ORACLE NetSuite

SuiteProjects Pro

User Guide

2024.2

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Table of Contents

SuiteProjects Pro Overview

Welcome to SuiteProjects Pro.

This guide includes information about the SuiteProjects Pro user interface and describes how to use its features.

The User Guide includes the following chapters:

- SuiteProjects Pro Overview — This overview includes a brief introduction to SuiteProjects Pro applications (modules) (see SuiteProjects Pro Applications).
- Signing In to SuiteProjects Pro — Describes how to access SuiteProjects Pro, change your password, or reset your password.
- Navigating SuiteProjects Pro — Describes how to navigate SuiteProjects Pro, including the Create, Tips, User Menu, and other navigation options available from all pages in SuiteProjects Pro.
- Working with Lists and Records — Describes how to use the functionality of:
  - Redesigned lists — See Lists.
  - Lists using the previous UI layout and functionality — See Lists — Previous UI Version Layout.

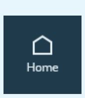
    > **Note:** Not all lists use the redesigned list view layout and functionality. For information about lists using the redesigned list view layout and functionality, see Feature Changes in the Redesigned User Experience.

  - Records — See Records.
- Working with the Project Center View — Describes how to work with the Project Center view. The Project Center optional feature aims to provide you with the tools to manage key project activities from a single page.
- Home Application — Gives a general introduction to the Home module, including dashboards and calendars..
- Working with Reports — Gives a general introduction to the Reports module, including the Report Management and Editor optional feature and user interface.
- References — Provides reference material, including descriptions for most icons used on the SuiteProjects Pro user interface.

SuiteProjects Pro Applications

The SuiteProjects Pro system contains various applications, also referred to as modules. These applications are designed around specific functional areas, as described in the table below.

> **Note:** The way these applications operate in your environment is dependent on the business needs of your company. You may not have access to all these applications or all the functionality within these applications. Access is controlled by role permissions and other settings managed by your account administrator.

Icon	Description
	**Home Application —** A home base application providing you critical information such as messages and reminders of pending approvals. It can also contain wizards, which help you quickly update data throughout the system, quick access to saved reports, which can be displayed in graphical forms such as pie charts and line graphs.

Opportunities Application — This application enables you to manage prospective new business for your company with existing customers as well as with new customers and prospects. You are able to create Deals, Estimates, Proposals, To dos, and Events within the application.

Opportunities

> **Important:** Access to the Opportunities application is restricted. As communicated in the SuiteProjects Pro 2023.2 release notes, enabling the Opportunities application is no longer permitted. You can continue using the Opportunities if it is currently enabled in your account.
>
> As an alternative to using the Opportunities module, consider using project stages to track projects through the sales cycle. For more information about project stages, see the help topic Project Stages.

Projects

Projects Application — This is one of the primary components within SuiteProjects Pro. This is where management of your projects takes place. The application is flexible and provides several features to address your business needs.

Resources

Resources Application — This application enables you to schedule resources to projects. It also provides a vehicle to store the skill sets, education, industry experience, job roles and location of employees in the SuiteProjects Pro database. You can then search the database to find the right resource.

Invoices

Invoices Application — This application handles financial transactions such as customer charges and invoices in SuiteProjects Pro. Primarily focused on invoicing your customers, the Invoices application manages the results of running the billing rules you can set up for projects in the Projects application.

Timesheets

Timesheets Application — This application is where employees record their time against customer or internal projects.

Expenses

Expenses Application — This application is where employees enter expense reports against projects for a specific date or period of time. It can also handle authorizations for employee spending on company expenses.

Purchases

Purchases Application — This application provides the ability to create a process flow from a purchase request to fulfillment and receipt, and lets you track purchases made within your company.

Reports

Reports Application — This application lets you create and run a wide variety of reports based on your business configuration. SuiteProjects Pro provides a robust and flexible reporting environment.

Workspaces

Workspaces Application — This application provides an area where you can store documents and share them with others. It acts as an administrative library within SuiteProjects Pro.

Administration

Administration Application — This is where account administrators manage the many configuration options within SuiteProjects Pro.

MC

User Menu — This is where you set up your user preferences. You can also view your profile and access SuiteProjects Pro Help and Support features from the User Menu.

Feature Changes in the Redesigned User Experience

The following table summarizes the feature changes introduced with the UI upgrade to the redesigned user experience, as well as the lists that benefit from the redesigned list view layout and functionality, and the records and pages that benefit from the redesigned header layout and functionality. Other features retain the layout and functionality of the previous user interface.

Other optional features work particularly well with the new user interface and let you take full advantage of its capabilities — see Optional Features.

<table>
<tr><th>Features</th><th>Redesigned Lists</th><th>Redesigned Page and Record Headers</th></tr>
<tr>
<td>

Navigation:

Navigation bar
Application menu
Create, Tips and Resource compare view buttons
User Menu

Lists:

Fixed position for Run an action / Bulk actions and Modify columns
Column lock
Improved pagination
Redesigned toolbar
To approve tab
Bulk actions
Sorting options
Advanced filters
Rows per page list options
Column totals
Multicurrency monetary totals
Column filters
Preset column filters when opening list from QuickView or Bookings Chart
List smart rendering

Record Header:

Title and subtitle
In-record navigation
Record information panel

Page Header:

Title and subtitle
Tab navigation

</td>
<td>

Projects module

Alerts
Bookings
Issues
Projects
Projects > [Select a project] > Issues
Projects > [Select a project] > Financials > Billing > Rules
Projects > [Select a project] > Financials > Billing > Transactions
Projects > [Select a project] > Financials > Recognition > Rules
Projects > [Select a project] > Financials > Recognition > Transactions
Project budgets
Tasks

Resources module

Alerts
Bookings
Resources
Resource Demand Requests (RDR)
Resource Request Queues (RRQ)

Timesheets module

Alerts
Leave accrual > All transactions
Schedule requests
Time entries
Timesheets

Expenses module

Alerts
Authorizations
Expense reports
Expense reports > [Select an expense report] > Receipts

</td>
<td>

Record Headers:

Bookings
Customers
Employees
Expense reports
Filter sets
Guests
Invoices
Projects
Purchase orders
Purchase requests
Resource profile approvals
Resources
Resource requests
Schedule requests
Timesheets
Workspaces
Workspace Discussions
Workspace Documents

Other Page Headers:
Administration > Global Settings
Administration > Application Settings

</td>
</tr>
</table>

	- Receipts ▪ **Invoices module** - Invoices - Retainers - Slips ▪ **Purchases module** - Fulfillments - Fulfillments outstanding / Fulfilled POs - Purchase items - Purchase orders - Purchase orders > [*Select a purchase order*] > Purchase items - Purchase requests - Purchase requests > [*Select a purchase request*] > Request items - Request items ▪ **Reports module** Saved Reports ▪ **Workspaces module** - Alerts - Discussions - Documents - Workspaces - Workspaces > [*Select a workspace*] > Discussions - Workspaces > [*Select a workspace*] > Documents - Workspaces > [*Select a workspace*] > Links	

	▪ **Administration module** ▫ Application settings > [*Select an application*] > Approval processes ▫ Application settings > [*Select an application*] > Notifications ▫ Application settings > Expenses > Expense items ▫ Application settings > Expenses > Vendors ▫ Application settings > Invoices > Agreements ▫ Application settings > Invoices > Charge stages ▫ Application settings > Invoices > Customer POs ▫ Application settings > Invoices > Invoice layouts ▫ Application settings > Invoices > Services ▫ Application settings > Projects > Assignment groups ▫ Application settings > Projects > Budget activities ▫ Application settings > Projects > Budget categories ▫ Application settings > Projects > Issue categories ▫ Application settings > Projects > Issue stages ▫ Application settings > Projects > Project locations ▫ Application settings > Projects > Project stages ▫ Application settings > Projects > Service [1–5] lines ▫ Application settings > Projects > Severities ▫ Application settings > Projects > Sources ▫ Application settings > Projects > Statuses ▫ Application settings > Projects > Task types ▫ Application settings > Purchases > Accounts payable locations ▫ Application settings > Purchases > Carriers ▫ Application settings > Purchases > F.O.B. locations ▫ Application settings > Purchases > Manufacturers	

	▫ Application settings > Purchases > Products ▫ Application settings > Purchases >Purchasers ▫ Application settings > Purchases > Receiving locations ▫ Application settings > Purchases > Shipping terms ▫ Application settings > Resources > Attribute sets ▫ Application settings > Resources > Booking types ▫ Application settings > Resources > Generics ▫ Application settings > Purchases > Vendors ▫ Application settings > Resources > Skill/Education/Location/Job role/ Industry/Custom profile NN ▫ Application settings > Timesheets > Leave accrual rules ▫ Application settings > Timesheets > Payroll types ▫ Application settings > Timesheets > Services ▫ Application settings > Timesheets > Time types ▫ Application settings > Workspaces > Document categories ▫ Global settings > Custom Fields ▫ Global settings > Customers > Contacts ▫ Global settings > Customers > Customer locations ▫ Global settings > Customers > Customers ▫ Global settings > Display > Email templates ▫ Global settings > Jobs, rates > Cost centers ▫ Global settings > Jobs, rates > Job codes ▫ Global settings > Jobs, rates > Rate cards ▫ Global settings > Organization > Accounting Periods ▫ Global settings > Organization > Current Periods ▫ Global settings > Organization > Departments ▫ Global settings > Organization > Hierarchies	

	▫ Global settings > Organization > Projects ▫ Global settings > Organization > Saved List Views ▫ Global settings > Organization > Work schedules ▫ Global settings > Reports > Custom calculations ▫ Global settings > Reports > Custom time ranges ▫ Global settings > Reports > Enabled Features ▫ Global settings > Users > Employee locations ▫ Global settings > Users >Employees ▫ Global settings > Users > Filter sets ▫ Global settings > Users > Filter sets > [*Select a filter set*] > Access Control ▫ Global settings > Users > Guests ▫ Global settings > Users > Guest roles ▫ Global settings > Users > Roles	

Optional Features

The following optional features work particularly well with the redesigned SuiteProjects Pro user experience and let you take full advantages of its capabilities. Contact your account administrators to check whether these features are enabled in your SuiteProjects Pro configuration.

- **Inline-editing in lists** — This feature lets you edit items data directly from the list, without having to open the item form. This is currently available only in the project tasks list and in the project center (if the Project Center feature is enabled). See Inline-Editing in Lists.
- **Project Center** (Requires the Inline-Editing in Lists feature) — This feature lets you create and modify your project plan, create new phases and tasks directly from the new list and drag-and-drop tasks and phases to reorder them, and create and manage resource bookings to your project and tasks from within the same outline view. See Working with the Project Center View.
- **Redesigned Administration module** (enabled by default) — This feature lets account administrators and users with the relevant access rights use the main navigation to go to administration global settings sections and use tabs in the global settings page header to move between pages. See Administration Settings Page Navigation.
- **Redesigned Advanced Filters** — This 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. The new layout brings better usability and takes less of your canvas space. See Redesigned Advanced Filters (Optional Feature).
- **Consolidated user profile** — This feature lets you review information about you and other resources at a glance, including skills and experience. You can access your resource profile from the user menu when this feature is enabled.
- **Customized user avatars** — This feature lets you or your account administrator upload a profile picture. In the new UI, this picture displays in the User Menu, when this feature is enabled.

- **Save list layout** — This feature lets you save list layouts for future use. You can use the enhanced list controls and options the new UI offers to create custom configurations to suit your every need and switch between these configurations at any time. See Personalized List Layouts.

The following usability enhancements are also available as optional features for redesigned lists:

- **Wrap text in list cells** — This feature wraps long text over multiple lines in list cells instead of showing truncated text on a single line. See Display Options for Long Text Cells in Lists.

Signing In to SuiteProjects Pro

To access SuiteProjects Pro, go to the SuiteProjects Pro sign-in page and enter your sign-in details. Use the following web address: https://auth.netsuitesuiteprojectspro.com/login.

> **Note:** To access a SuiteProjects Pro sandbox account, go to https://auth.sandbox.netsuitesuiteprojectspro.com/login.

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

The sign-in page includes two tabs. Clicking either tab changes the URL in your browser address bar without reloading the page.

- **Password** – Use the Password tab if you sign in using your SuiteProjects Pro sign-in details. See Signing In Using Your SuiteProjects Pro Sign-In Details.

  You may be required to provide a second factor when signing in using your SuiteProjects Pro sign-in details to add more security to your company's SuiteProjects Pro account. See Signing In Using Two-Factor Authentication (2FA).
- **Single Sign-On** – Use the Single Sign-On tab if you sign in to SuiteProjects Pro by entering your username and password on your company single sign-on page. See Signing In to SuiteProjects Pro Using Single Sign-On (SSO).

  > **Note:** Depending on the single sign-on solution used in your company, you may need to enter your SSO details on your company SSO page first, then select the application you want to access. In this case, refer to your internal documentation for instructions.

If you are not sure which tab or sign-in method you need to use, see your company's internal documentation or the instructions provided by your account administrator.

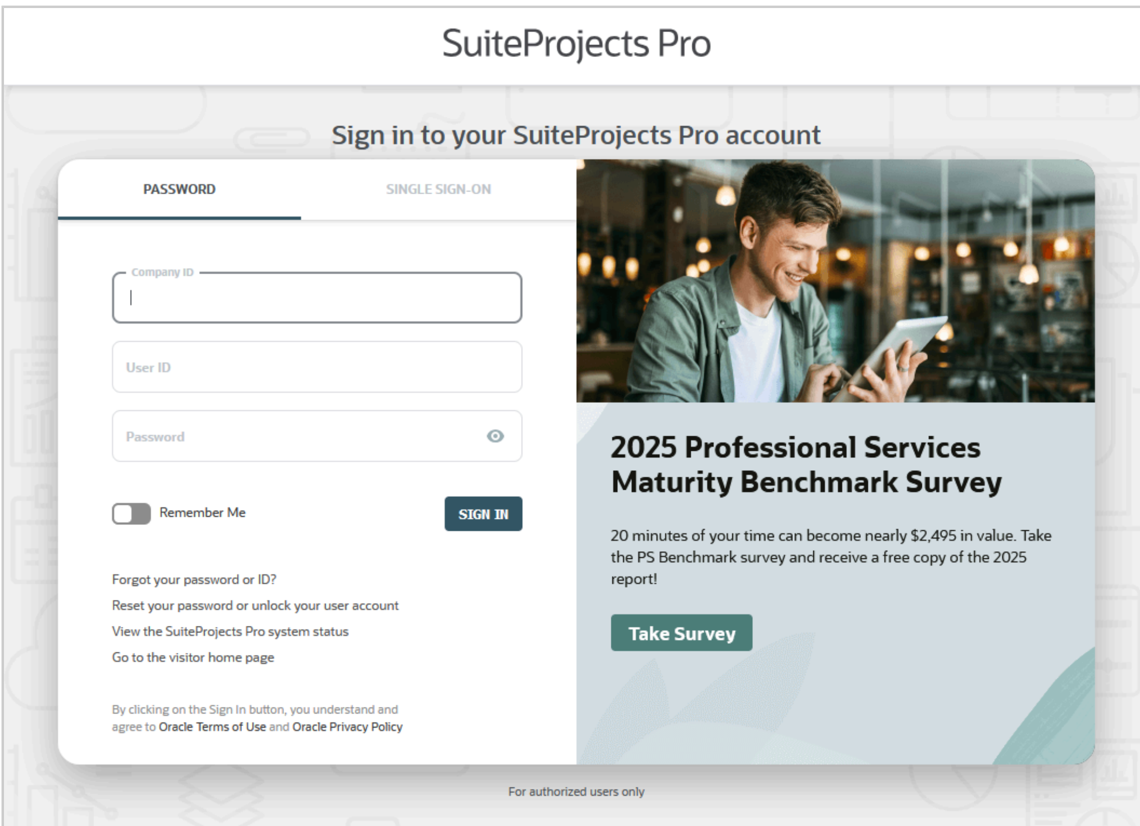
The sign-in page includes the following links.

- **Forgot your password and ID?** – Click this link to get a reminder of your user ID and the hint you set up for your password. See ID and Password Reminder.
- **Reset your password or unlock your user account** – Depending on your company's account configuration, you can click this link to regain access to your SuiteProjects Pro account after answering a security challenge. See Resetting Your SuiteProjects Pro Password.
- **View the SuiteProjects Pro system status** – Click this link to check the availability of SuiteProjects Pro at any time.

- **Go to the visitor home page** – Click this link to go to the SuiteProjects Pro product information page (https://www.netsuite.com/portal/products/professional-services-automation/suiteprojects-pro.shtml).

The right panel includes announcements. We use this panel to communicate important service announcements from time to time. Review this panel regularly for information about planned service disruptions (during new release upgrades, for example) and other information.

> **Note:** The SuiteProjects Pro Mobile app on Android or iOS devices uses a version of this sign-in page adapted for smaller displays. This light version does not include the announcement panel.
>
> Your browser remembers which version of the sign-in page you last used to sign in to SuiteProjects Pro. You can change the sign-in page version by changing or appending the following query parameter at the end of the URL in the address bar of your browser:
>
> - `https://auth.netsuitesuiteprojectspro.com/login?ui=light` – light version adapted for smaller displays.
> - `https://auth.netsuitesuiteprojectspro.com/login?ui=default` – full version.



Signing In Using Your SuiteProjects Pro Sign-In Details

You need the following information to sign in to SuiteProjects Pro:

- Your **Company ID** — This is the unique identifier for your company's SuiteProjects Pro account.
- Your **User ID** — This is your unique identifier as a user of your company's SuiteProjects Pro account.
- Your **Password** — This is the secret combination of characters that you have created.

The combination of your **Company ID**, **User ID** and **Password** may be referred to as your SuiteProjects Pro sign-in details or user credentials in the SuiteProjects Pro documentation.

Passwords are valid for a limited period. See Password Expiration.

You will need to change your password periodically, before or when it expires. You may also need to change your password the first time you sign in to SuiteProjects Pro. See Changing your SuiteProjects Pro Password.

Depending on your company's account configuration, you may be required to set up security questions and answers. This gives you the ability to reset your password and regain access in case you are locked out of SuiteProjects Pro without the assistance of an account administrator. See Setting Up Security Questions and Resetting Your SuiteProjects Pro Password.

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

To sign in using your SuiteProjects Pro sign-in details:

1. Go to the SuiteProjects Pro sign-in page — https://auth.netsuitesuiteprojectspro.com/login.

   > **Note:** To access a SuiteProjects Pro sandbox account, go to https://auth.sandbox.netsuitesuiteprojectspro.com/login.

2. Enter your **Company ID**, **User ID**, and **Password**.

   > **Tip:** You can get a reminder to your email address if you forgot your User Id or Password. See ID and Password Reminder.

3. Click **Sign in**.

   The SuiteProjects Pro user interface appears.

   You may need to set up two-factor authentication (2FA) or enter a verification code next time you sign in if required by your company before the SuiteProjects Pro UI appears. See Signing In Using Two-Factor Authentication (2FA).

   > **Important:** You have a limited number of sign-in attempts, after which you will be locked out of your company's SuiteProjects Pro account.

ID and Password Reminder

In case you forget your sign-in details, you can get a reminder of your user ID and the hint you set up for your password.

To get a reminder of your sign-in details:

1. Click the link **Forgot your password or ID?**.

   The "Forgot your password or ID?" page appears.
2. Enter your **Email address**. This must be the email address associated with your SuiteProjects Pro user account.
3. Click **Send reminder**.

   An email is sent to your email address with a reminder of your user ID and the hint you set up for your password.

Password Expiration

Passwords are valid for a limited period. Your password validity period depends on your company's account configuration.

After your password expires, the password form appears automatically if you try to sign in to SuiteProjects Pro. You must change your password before you can access SuiteProjects Pro. You can change your password at any time before it expires — see Changing your SuiteProjects Pro Password.

You will receive a password expiration notification email 14 days before the password expires, and 3 days before the password expires, unless you change your password before. The notification email includes the date your password will expire and instructions for changing your SuiteProjects Pro password.

Changing your SuiteProjects Pro Password

You may need to change your SuiteProjects Pro password the first time you sign in to SuiteProjects Pro or when your password expires. You can also change your password at any time.

> **Note:** If you are signing in using two-factor authentication (2FA), you will need to enter a verification code next time you sign in. All your trusted devices are removed automatically with every change of password. See Signing In Using Two-Factor Authentication (2FA).

To change your password in SuiteProjects Pro:

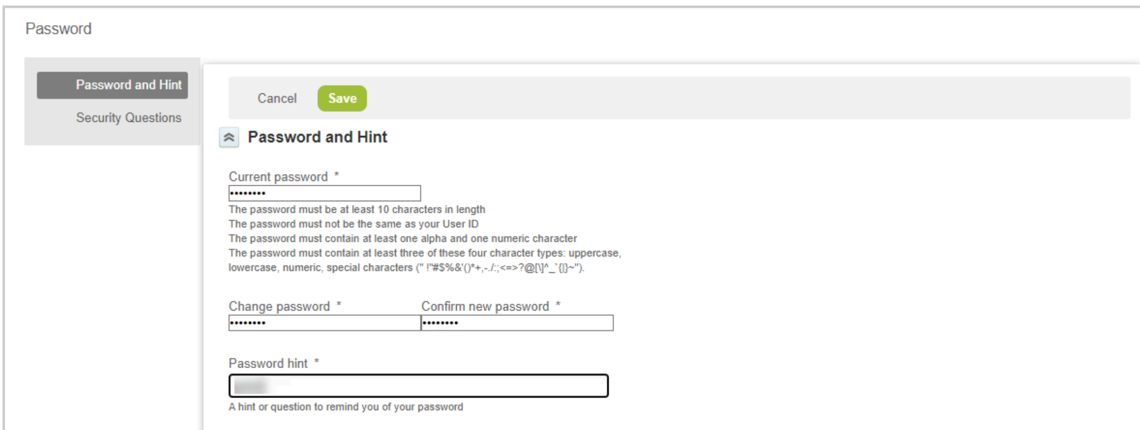
1. In SuiteProjects Pro, go to the User Menu and click Password.
2. Enter your **Current Password**.
3. Enter your new password in the **Change Password** field.
4. Enter your new password again in the **Confirm New Password** field.
5. Click **Save**.

A message appears confirming that your password was changed

It is important to choose a password that cannot be compromised. Your password must meet minimum requirements. The following minimum requirements apply to all SuiteProjects Pro accounts by default. However, a stricter password policy may be enforced for your company's account.

- The password must be at least characters 8 in length.
- The password must not be the same as your User ID.
- The password must contain at least one alpha and one numeric character.
- The password must contain at least three of these four character types: uppercase, lowercase, numeric, special characters (" !"#$%&'()*+,-./:;<=>?@[\]^_`{|}~").
- Your new password must not be the same as one of your last two previous passwords.

Tip: Create a password that is easy to remember and hard to guess.



Setting Up Security Questions

Depending on your company's account configuration, you may need to set up security questions when you sign in to SuiteProjects Pro for the first time. You may also be prompted to set up security questions when you change your password, if the Security Questions feature was enabled for your company's SuiteProjects Pro account recently. Security questions are used to verify your identity if you are unable to access SuiteProjects Pro. After you set up security questions in SuiteProjects Pro, you can reset your password and regain access to SuiteProjects Pro by answering a security challenge.

You can select your three security questions from the dropdown list and write your answers in the text field next to each question.

To set up your security questions:

1. Sign in to SuiteProjects Pro. If you have not already set up security questions and the feature is enabled for your SuiteProjects Pro account, the Password form appears.
2. Scroll down to the Security Questions section.
3. For each question, select a question and enter your answers in the text field.
4. Click **Save**.

You can change your security questions and answers at any time.

To change your security questions:

1. In SuiteProjects Pro, go to the User Menu and click Password.

   The Password page appears.
2. Scroll down to the Security Questions section.

   For each question, select a question and enter your answers in the text field.
3. Click **Save**.

> **Note:** When setting up or changing your security questions, consider the following rules:
>
> - You must answer all three questions.
> - Your answers should be unique for each question.

Resetting Your SuiteProjects Pro Password

Depending on your company's SuiteProjects Pro account configuration, you can reset your password and regain access in case you are locked out of SuiteProjects Pro without the assistance of an account administrator. If this option is available for your company's SuiteProjects Pro account, you will need to answer a security challenge to verify your identity and regain access to SuiteProjects Pro.

To reset your password and unlock your access to SuiteProjects Pro:

1. On the SuiteProjects Pro sign-in page, click **Reset your password or unlock your user account**.

   The "Lost access to your account?" page appears.
2. Enter your **Company ID**, **User ID** and **Email address**.
3. Click **Send instructions**.

   If the details entered are valid, the security challenge form appears.
4. Answer all three questions and click **Submit**. If you answer the questions correctly, you will receive an email with a temporary password.
5. Sign in to SuiteProjects Pro using the temporary password.

   The password form appears. You will regain access to SuiteProjects Pro after you change your password. See Changing your SuiteProjects Pro Password.

Note: If you are signing in using two-factor authentication (2FA), you need to enter a verification code before the password form appears. All your trusted devices are removed automatically with every change of password.

To find the verification code, open the authenticator app on your phone and locate your company's SuiteProjects Pro account. In the authenticator app accounts list, SuiteProjects Pro uses the account-specific domain for your company's SuiteProjects Pro account (typically `<company-id>.app.netsuitesuiteprojectspro.com` for a production account) and your user ID to identify the account and user set up to work with the authenticator app.

Signing In Using Two-Factor Authentication (2FA)

Requiring a second factor for authentication is a method of improving security. Your account administrator can require you to use two-factor authentication (2FA) to sign in to your company's SuiteProjects Pro account.

SuiteProjects Pro sends you an email notification if an account administrator enrolls you to sign in to your company's SuiteProjects Pro account using 2FA. The next time you sign in to SuiteProjects Pro, you will be asked to set up 2FA. See Set Up Two-Factor Authentication (2FA).

After you set up 2FA, you will be asked to enter a verification code when you sign in.

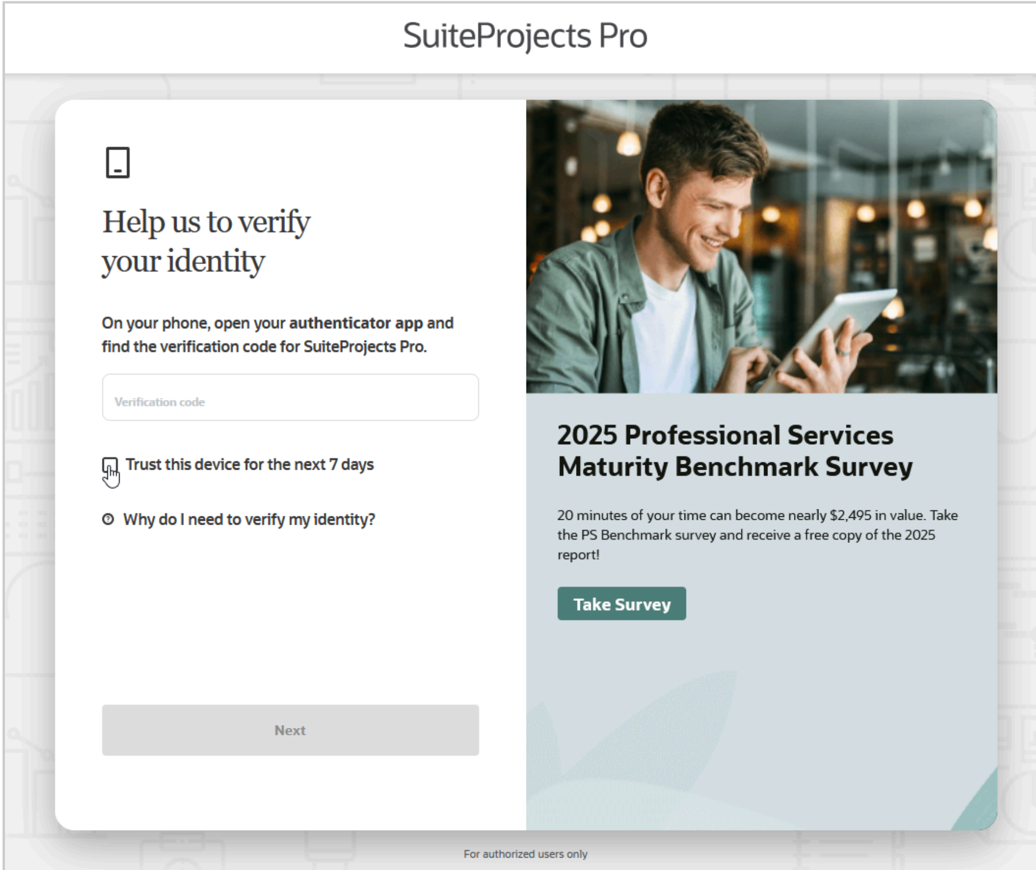
Important: If you change your phone, change your authenticator app, or lose your phone, reset (clear) your 2FA settings in SuiteProjects Pro to access your company's SuiteProjects Pro account. After you reset 2FA, you will be asked to set up 2FA again on the next sign in. See Reset Your Two-Factor Authentication (2FA) Settings.

If you share or lose one of your trusted devices, you must remove all your trusted devices to protect your company's SuiteProjects Pro account from unauthorized access. See Trusted Devices.

To sign in to SuiteProjects Pro using 2FA:

1. Go to the SuiteProjects Pro sign-in page — https://auth.netsuitesuiteprojectspro.com/login.
2. Enter your **Company ID**, **User ID** and **Password**.
3. Click **Sign in**.

   The **Help us to verify your identity** page appears.



4. Enter the **verification code** on the SuiteProjects Pro 2FA verification page.

   To find the verification code, open the authenticator app on your phone and locate your company's SuiteProjects Pro account. In the authenticator app accounts list, SuiteProjects Pro uses the account-specific domain for your company's SuiteProjects Pro account (typically <company-id>.app.netsuitesuiteprojectspro.com for a production account) and your user ID to identify the account and user set up to work with the authenticator app.

5. (Optional) Check the **Trust this device for the next <number> days** box to add the device to your list of trusted devices. This will let you sign in to SuiteProjects Pro on that device without being asked to enter a verification code every time.

> **Note:** Your company's SuiteProjects Pro account may not allow you to add trusted devices. Your account administrator controls whether the Trusted Devices feature is available and how long devices can be trusted.

6. Click **Next**.

   The SuiteProjects Pro UI appears.

> **Important:** If your verification code is refused several times, follow the instructions to Troubleshoot Authenticator Apps before you try again. Using an incorrect validation code during 2FA setup or identity verification counts as a failed sign-in attempt. You have a limited number of sign-in attempts, after which you will be locked out of your company's SuiteProjects Pro account.

Learn more

- Why do I need 2FA? How does 2FA add more security to SuiteProjects Pro?
- What is my authenticator app?
- The code from my authenticator app isn't right. What's wrong?
- There's not enough time to enter the verification code before it changes. What do I do?
- Can I transfer the 2FA setup from my old phone to a new one?
- Can I switch authenticator apps?
- Troubleshoot Authenticator Apps

Set Up Two-Factor Authentication (2FA)

If you are required to set up two-factor authentication (2FA), onscreen instructions guide you through the 2FA setup process after you enter your company ID, user ID and password on the SuiteProjects Pro sign-in page, and click **Sign In**.

> **Note:** You can set up 2FA from the sign-in form that you use when signing in to the SuiteProjects Pro UI, when connecting the SuiteProjects Pro Mobile app to SuiteProjects Pro, or when authorizing an API integration application to access SuiteProjects Pro on your behalf.

To set up 2FA:

1. Click **Set up 2FA**.

   The 2FA setup step 1/3 page appears.

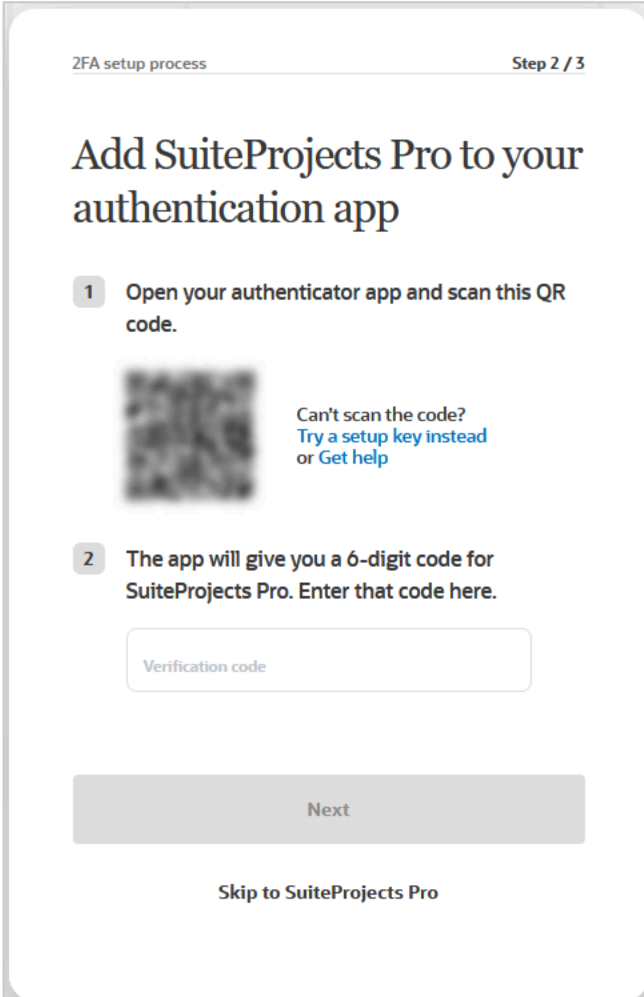
   > **Note:** At different steps through the setup process, you can click **Skip to SuiteProjects Pro** to dismiss the 2FA setup. You can skip the 2FA setup up to a limited number of times or days. After that, you are required to complete the setup to access SuiteProjects Pro.

2. Install Oracle Mobile Authenticator on your phone. You can download the app from the App Store (iOS) or from Google Play (Android).

   > **Note:** You can use any app that complies with the OATH TOTP standard, if you have already one installed on your phone.

   After you have installed the authenticator app, click **Next**.

   The 2FA setup step 2/3 page appears. It includes a QR code and a link to **Try a setup key instead**.



3. Using the authenticator app on your phone, scan the QR code, or enter a setup key manually.

   The authenticator app generates a verification code.

4. Enter the verification code on the SuiteProjects Pro 2FA setup step 2/3 page, and click **Next**. Verification codes generated by an authenticator app expire approximately every 30 seconds. Enter a new code if the initial code you receive expires.

   > **Important:** If your verification code is refused several times, follow the instructions to Troubleshoot Authenticator Apps before you try again. Using an incorrect validation code during 2FA setup or identity verification counts as a failed sign-in attempt. You have a limited number of sign-in attempts, after which you will be locked out of your company's SuiteProjects Pro account.

5. Click **Next**.

   The 2FA setup finished page appears.

6. Click **Enter SuiteProjects Pro** to access the SuiteProjects Pro UI.

   The SuiteProjects Pro UI appears. The 2FA setup is completed.

> **Note:** You need to click **Enter SuiteProjects Pro** to complete the setup. The 2FA setup finished page will appear on the next sign-in otherwise.
>
> SuiteProjects Pro sends an email notification to your email address when you complete your 2FA setup.

Learn more

- Why do I need 2FA? How does 2FA add more security to SuiteProjects Pro?
- Can I skip the 2FA setup?
- What do I need to know about authenticator apps?
- What authenticator app can I use for 2FA?
- I can't scan the QR code as required in the 2FA setup, what should I do?
- The QR code and the setup key don't work. What's wrong?
- The code from my authenticator app isn't right. What's wrong?
- There's not enough time to enter the verification code before it changes. What do I do?
- Troubleshoot Authenticator Apps

Reset Your Two-Factor Authentication (2FA) Settings

To avoid disrupting your access to your company's SuiteProjects Pro account, you need to reset (clear) your two-factor authentication (2FA) settings if you:

- Change your authenticator app.
- Change your phone.
- Lose your phone.

> **Note:** OpenAir is now SuiteProjects Pro. As of 5 a.m. Eastern Time (UTC–5) on January 25, 2025, for your sandbox account, and on February 15, 2025, for your production account, service URLs with the `netsuitesuiteprojectspro.com` domain name replace URLs with the `openair.com` domain name.
>
> Your existing 2FA setup continues to work after the change of domain. However, your authenticator app will show your previous account URL with the `openair.com` domain. For the authenticator app to show your new account URL with the `netsuitesuiteprojectspro.com` domain, reset your 2FA settings and set up 2FA again.
>
> For more information about the change, see the help topic Introducing SuiteProjects Pro (Action Required).

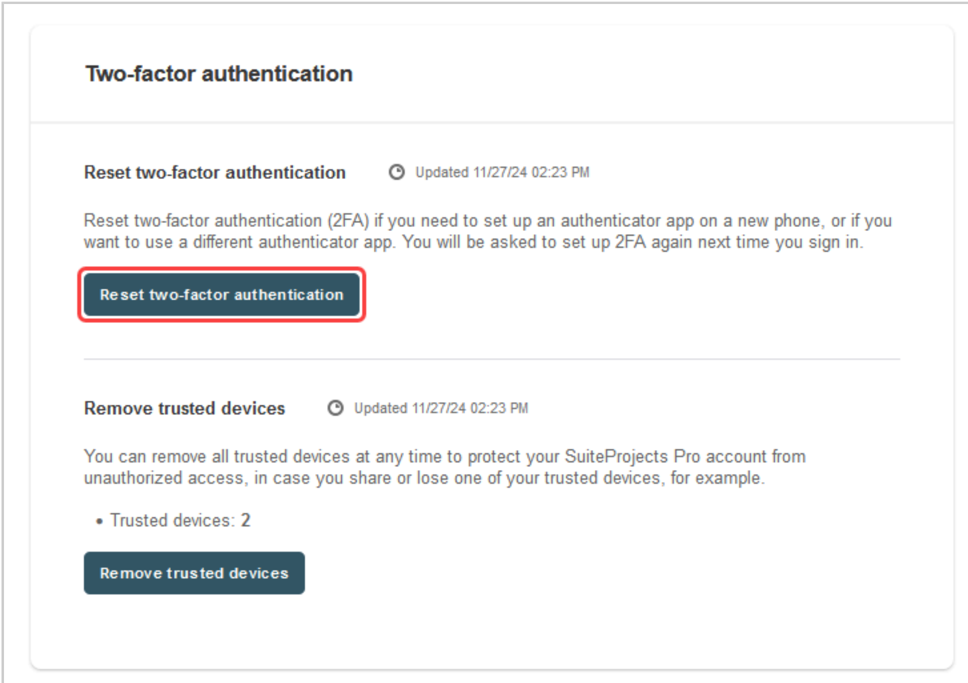
When you reset your 2FA settings, you remove your existing 2FA setup information from SuiteProjects Pro. After you reset 2FA, you will be asked to set up 2FA again on the next sign in.

You can reset your 2FA settings in SuiteProjects Pro.

> **Note:** If you are not able to sign in to SuiteProjects Pro to reset your 2FA settings, contact your account administrator for assistance.

To reset your 2FA settings:

1. In SuiteProjects Pro, go to User Menu > Two-factor authentication.



2. Click **Reset two-factor authentication**.

   A window appears asking you to enter a verification code.

3. Enter the **verification code**.

   To find the verification code, open the authenticator app on your phone and locate your company's SuiteProjects Pro account. In the authenticator app accounts list, SuiteProjects Pro uses the account-specific domain for your company's SuiteProjects Pro account (typically `<company-id>.app.netsuitesuiteprojectspro.com` for a production account) and your user ID to identify the account and user set up to work with the authenticator app.

4. Click **Reset**.

   A confirmation message appears. You will be asked to set up 2FA again next time you sign in to your company's SuiteProjects Pro account.

   > **Note:** SuiteProjects Pro sends an email notification to your email address when you reset your 2FA settings or an account administrator resets your 2FA settings.

Learn more

- Can I transfer the 2FA setup from my old phone to a new one?
- Can I switch authenticator apps?
- Where do I reset my 2FA?
- I can't reset my 2FA, what should I do?

Trusted Devices

If your company's SuiteProjects Pro account allows you to add trusted devices, you can ask SuiteProjects Pro to trust a device for several days when you sign in. This will let you sign in to SuiteProjects Pro on that same device without being asked to enter a verification code every time. See Signing In Using Two-Factor Authentication (2FA).

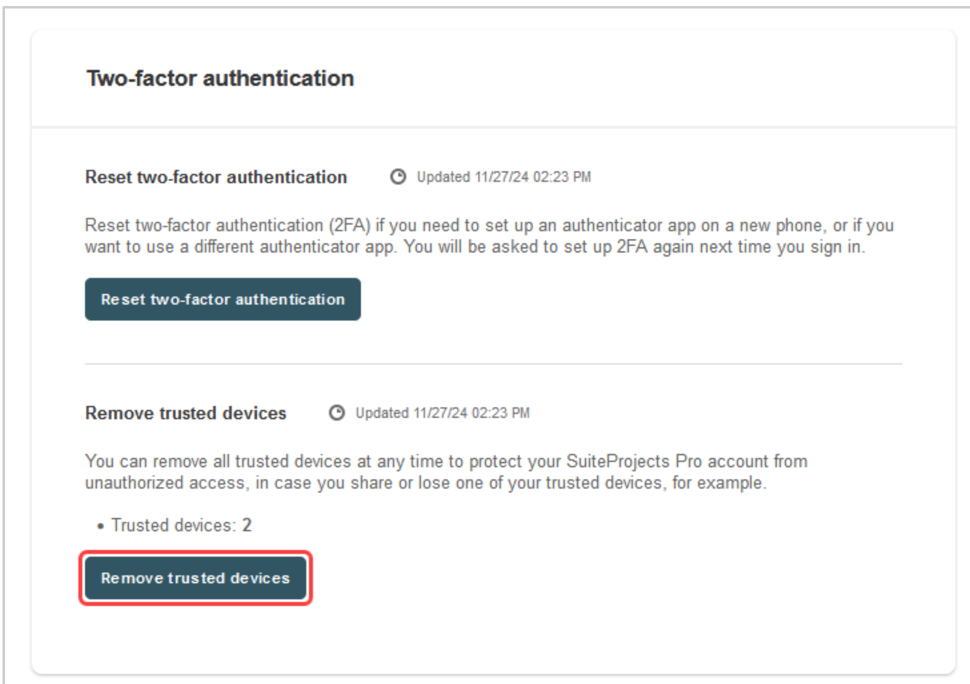
To protect your company's SuiteProjects Pro account from unauthorized access, you need to remove all your trusted devices if you share or lose one of your trusted devices.

You can view the number of current trusted devices or remove your trusted devices in SuiteProjects Pro.

> **Note:** If you are not able to sign in to SuiteProjects Pro to remove your trusted devices, contact your account administrator for assistance.

To view the number of current trusted devices or remove your trusted devices:

1. In SuiteProjects Pro, go to User Menu > Two-factor authentication.



2. Click **Remove trusted devices**.

   A window appears asking you to enter a verification code.
3. Enter the **verification code**.

   To find the verification code, open the authenticator app on your phone and locate your company's SuiteProjects Pro account. In the authenticator app accounts list, SuiteProjects Pro uses the account-specific domain for your company's SuiteProjects Pro account (typically <company-id>.app.netsuitesuiteprojectspro.com for a production account) and your user ID to identify the account and user set up to work with the authenticator app.
4. Click **Remove**.

   A confirmation message appears. You will be asked to enter a verification code next time you sign in to your company's SuiteProjects Pro account.

Two-Factor Authentication FAQ

Review the following frequently asked questions and answers about two-factor authentication (2FA).

Why do I need 2FA? How does 2FA add more security to SuiteProjects Pro?

Two-factor authentication (2FA) adds an extra verification step when you sign in to SuiteProjects Pro. This extra step prevents your account from unauthorized access, even when your password gets compromised. 2FA codes from your authenticator app are complicated to intercept, which makes 2FA a reliable form of authentication.

Can I skip the 2FA setup?

If your company requires you to sign in using 2FA, you can skip two-factor authentication (2FA) setup up to the number of times and number of days set by your account administrator. You will be asked to set up 2FA next time you attempt to sign in. After that, you won't be able to sign in to your company's SuiteProjects Pro account until you complete the 2FA setup. See Set Up Two-Factor Authentication (2FA).

What do I need to know about authenticator apps?

An authenticator app generates the verification code (the second factor) that you need for signing in to SuiteProjects Pro. It provides a code even when you're not connected to a network.

What authenticator app can I use for 2FA?

You can use any authenticator app that complies with the OATH TOTP standard.

- **OATH** stands for the Initiative for Open Authentication.
- **TOTP** stands for time-based one-time password.

Oracle Mobile Authenticator is one example of OATH TOTP-compliant app.

You can use a term like OATH TOTP to search for other compliant authenticator apps.

I can’t scan the QR code as required in the 2FA setup, what should I do?

To scan the QR code, you may first need to select **Scan a QR code** or **Add Account** in the app.

For more information, see the help for your app.

- If you've reset 2FA in SuiteProjects Pro, you can use the same authenticator app to set up 2FA again.
- If your app won’t scan the QR code or accept a manually entered key, delete the SuiteProjects Pro account from your app, and try scanning the QR code again.

The QR code and the setup key don't work. What's wrong?

Your authenticator app may not be OATH TOTP-compliant. Try installing a different authenticator app. Oracle Mobile Authenticator is OATH TOTP-compliant.

For more information, see the help for your app.

- If you've reset 2FA in SuiteProjects Pro, you can use the same authenticator app to set up 2FA again.
- If your app won’t scan the QR code or accept a manually entered key, delete the SuiteProjects Pro account from your app, and try scanning the QR code again.

The code from my authenticator app isn’t right. What's wrong?

There are a few possible reasons for SuiteProjects Pro not accepting the code from your authenticator app.

- Verify that you've entered the code exactly as it appears in your authenticator app.
- If you have more than one account listed in your authenticator app, be sure you're entering the code associated with your SuiteProjects Pro account.
- The time on your phone needs to be accurate. Directions for different versions of phone software vary. See Troubleshoot Authenticator Apps.

There's not enough time to enter the verification code before it changes. What do I do?

You can enter either the current or the previous verification code generated by the authenticator app. This gives you some additional time to enter the verification code even after it changes.

Can I transfer the 2FA setup from my old phone to a new one?

It depends on an authenticator app you use.

What is my authenticator app?

You may have used Oracle Mobile Authenticator to set up two-factor authentication (2FA) for SuiteProjects Pro. You may also have used another app that complies with the OATH TOTP standard.

If you lost your mobile phone or you can’t access your authenticator app, contact the person in your company who manages SuiteProjects Pro to reset 2FA. If you reset 2FA, you will be asked to set up 2FA again next time you sign in.

Can I switch authenticator apps?

Yes, the process is the same as when you need to reset your 2FA. See Reset Your Two-Factor Authentication (2FA) Settings.

Where do I reset my 2FA?

After you sign in to SuiteProjects Pro, go to the User Menu (your avatar menu in the upper-right corner), and click **Two-factor authentication**.

This page lets you reset 2FA. See Reset Your Two-Factor Authentication (2FA) Settings.

I can't reset my 2FA, what should I do?

If you can't generate a 2FA verification code, you need to contact your account administrator to help you reset 2FA.

What is a trusted device?

If your company's SuiteProjects Pro account allows you to add trusted devices, you can ask SuiteProjects Pro to trust a device for several days when you sign in. This will let you sign in to SuiteProjects Pro on that device without being asked to enter a verification code every time.

Each trusted device is removed automatically several days after you add it to your trusted devices, depending on your company's SuiteProjects Pro account configuration.

You or the person in your company who manages SuiteProjects Pro can remove all your trusted devices at any time to protect your SuiteProjects Pro account from unauthorized access, in case you share or lose one of your trusted devices, for example.

Troubleshoot Authenticator Apps

Occasionally, SuiteProjects Pro will not accept verification codes generated by your authenticator app. You may get an error message that the code is expired. If your phone (and perhaps your app) are not synchronized to the proper time source, your verification codes will not work.

> **Important:** If your verification code is refused several times, use the following steps to troubleshoot your authenticator app before you try again. Using an incorrect validation code during 2FA setup or identity verification counts as a failed sign-in attempt. You have a limited number of sign-in attempts, after which you will be locked out of your company's SuiteProjects Pro account.

Use the following steps to verify your phone and authenticator app settings.

To synchronize time on your phone and your authenticator app:

1. On your phone, go to the settings screen and locate the settings for date and time.
   - On iOS devices, go to Settings > General > Date & Time. Verify that the switch for the setting **Set Automatically** is on.
   - On Android devices, go to Settings > System > Date & Time. Verify that the switch for the settings **Automatic date & time** and **Automatic time zone** is on.

> **Note:** The navigation path to the date and time settings, and the exact name of the settings varies depending on the type and the version of the operating system software on your phone (iOS or Android). Older software versions on some phones might have a **sync time to server** setting. Clear the box if the sync time to server setting is checked. Verify that the time on your phone is synchronized to **network** time.

2. Some authenticator apps have an internal time synchronization setting. If the time is not correctly synchronized, the verification codes will not work. Refer to the vendor documentation for your authenticator app for steps to correct the time in the app.

   In the Google Authenticator app for Android devices, for example, this setting is called **Time correction for codes**. Refer to Common issues with 2–Step Verification (External link to Google Support site) for troubleshooting steps.

3. If synchronizing time does not help you, try resetting 2FA. See Reset Your Two-Factor Authentication (2FA) Settings.

Signing In to SuiteProjects Pro Using Single Sign-On (SSO)

Your company may use a single sign-on (SSO) page to manage your access to SuiteProjects Pro and other applications.

Depending on the single sign-on solution used in your company, you may need to:

- Enter your SSO details on your company SSO page first, then launch SuiteProjects Pro from the single sign-on portal without needing to use the SuiteProjects Pro sign-in page. In this case, refer to your internal documentation for instructions.
- Start the sign-in process from the SuiteProjects Pro sign-in page. In this case, use the following steps.

If you are not sure which tab or sign-in method you need to use, see your company's internal documentation or the instructions provided by your account administrator.

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

To sign in to SuiteProjects Pro using SSO:

1. Go to the SuiteProjects Pro sign-in page at https://auth.netsuitesuiteprojectspro.com/login.

2. Click the **Single Sign-On** tab.

> **Note:** Clicking the **Password** or **Single Sign-On** changes the URL in your browser address bar without reloading the page.
>
> - https://auth.netsuitesuiteprojectspro.com/login for the Password tab.
> - https://auth.netsuitesuiteprojectspro.com/login_sso for the Single Sign-On tab.
>
> If you use single sign-on when you sign in:
>
> - The Single Sign-On tab is active the next time you go to https://auth.netsuitesuiteprojectspro.com/login and the URL in your browser address bar changes to https://auth.netsuitesuiteprojectspro.com/login_sso, unless you clear your browser cache history.
> - If your SuiteProjects Pro session times out, you are redirected to the sign-in page with the Single Sign-On tab active (https://auth.netsuitesuiteprojectspro.com/login_sso)

3. Enter your **Company ID**.
4. Click **Sign in**.

   Your company single sign-on page appears.
5. Enter your single sign-on details. If your identity is verified successfully using SSO, you will be redirected to SuiteProjects Pro.

Navigating SuiteProjects Pro

This section introduces you to common elements and tools in the SuiteProjects Pro UI.

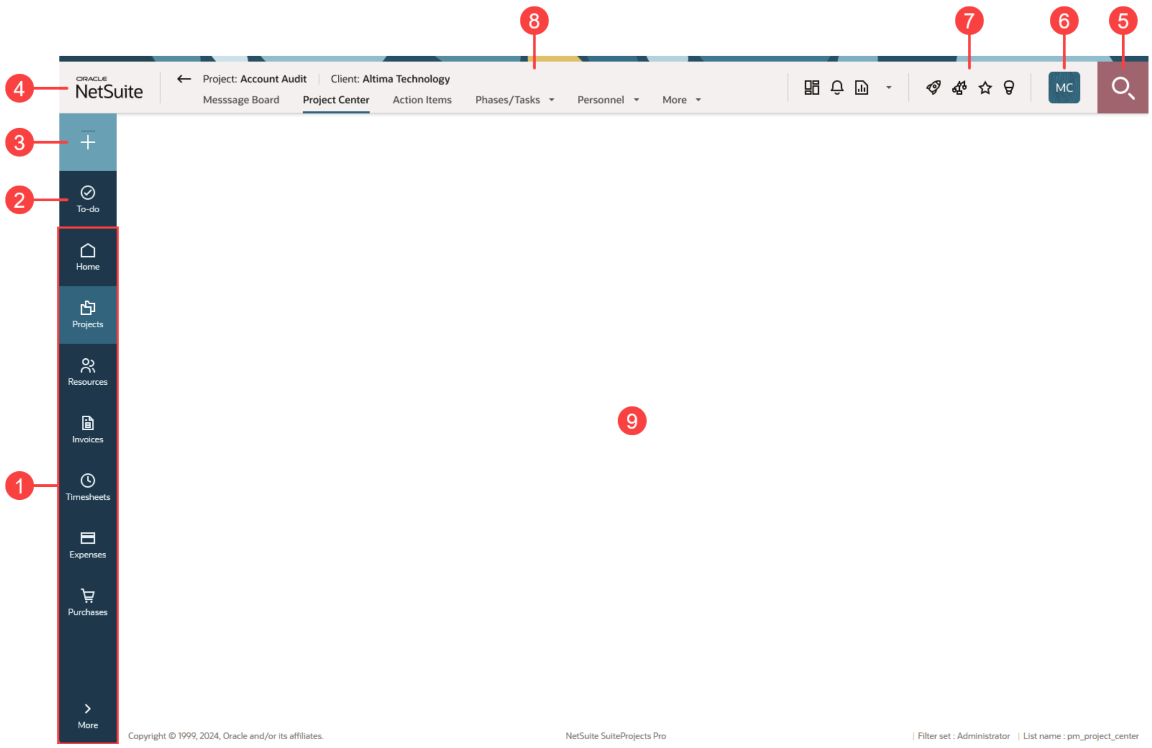
The following table describes functionality that is always available regardless of the page you are working in. Some of this functionality is context-sensitive and adapts according to the application you are using or the page you are viewing.

<table>
<tr><td>1</td><td>Main menu — The menu bar on the left lists the applications that you have access to. Click one of the application icons to show the menu for that application. Each application menu lists the various pages and tools available within that application. See Using the Main Menu.</td></tr>
<tr><td>2</td><td>To-do button — Click the to-do button between the main menu and the create button to show a list of tasks that require action as part of a workflow or business process in SuiteProjects Pro. See To-do list.</td></tr>
<tr><td>3</td><td>Create button — Click the create button below your company pictogram in the upper-left corner to show the create menu and create a new record. See Create Button.</td></tr>
<tr><td>4</td><td>Company pictogram — Your company pictogram is in the upper-left corner. The optimal pictogram size is 50 x 50 pixels. Larger logos are scaled down to fit within this dedicated space.

Depending on your company's account configuration, the company pictogram may be configured as a link to your company's intranet or any other web page.</td></tr>
<tr><td>5</td><td>Global Search — Click the search icon, then search and quickly go to any of the create actions, lists and settings pages accessible from the navigation menu, or search for a customer, project, employee or resource. See Getting Started with Global Search.</td></tr>
<tr><td>6</td><td>User Menu — Click on your initials or profile picture in the upper-right corner to show the user menu and access all user preference and support features. See User Menu.

Note: The top bar shows your initials on a blue color background or your profile picture, if you have one.

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.</td></tr>
<tr><td>7</td><td>Utility buttons — Several utility buttons give you access to additional tools from anywhere in SuiteProjects Pro, depending on your access profile. See Utility Buttons.</td></tr>
<tr><td>8</td><td>Page header — The page header indicates the page or the record you are currently viewing. For some pages, the page header also includes a secondary navigation menu and an information panel. See Canvas and Page Header.</td></tr>
<tr><td>9</td><td>Canvas — Your business data displays in the canvas area. See Canvas and Page Header.</td></tr>
</table>



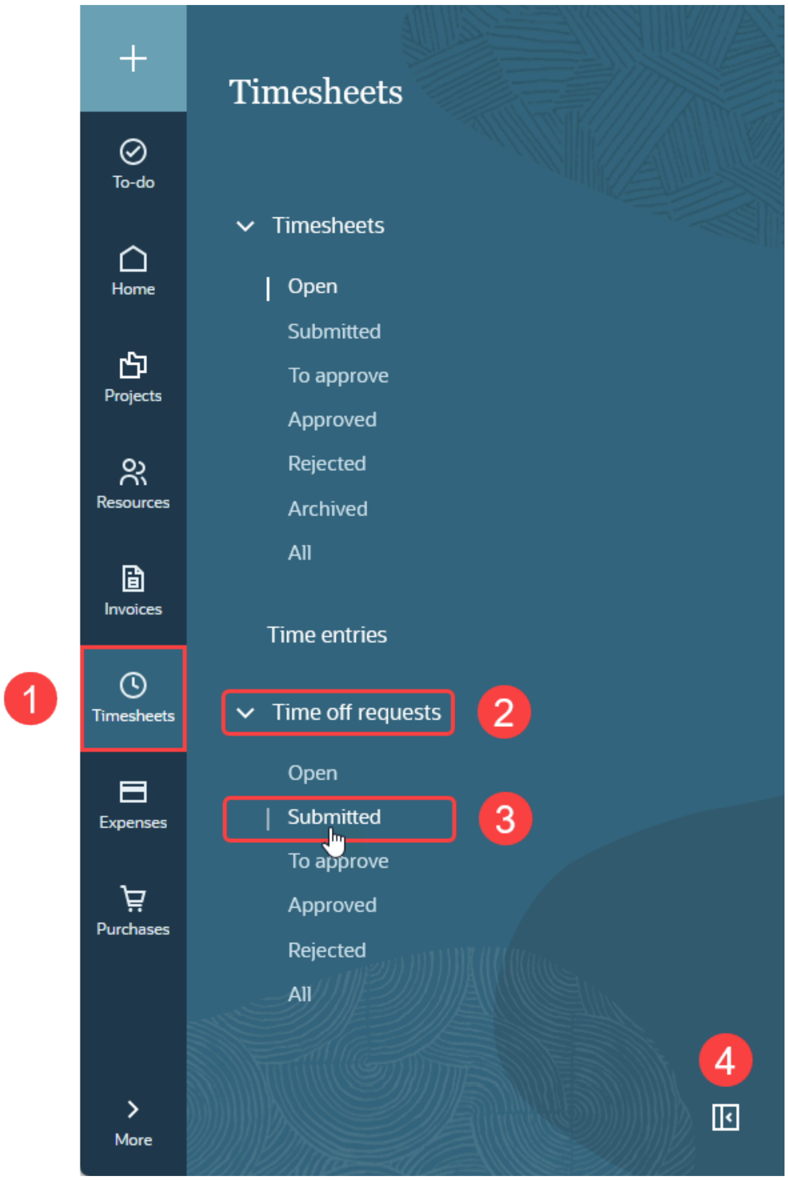
Using the Main Menu

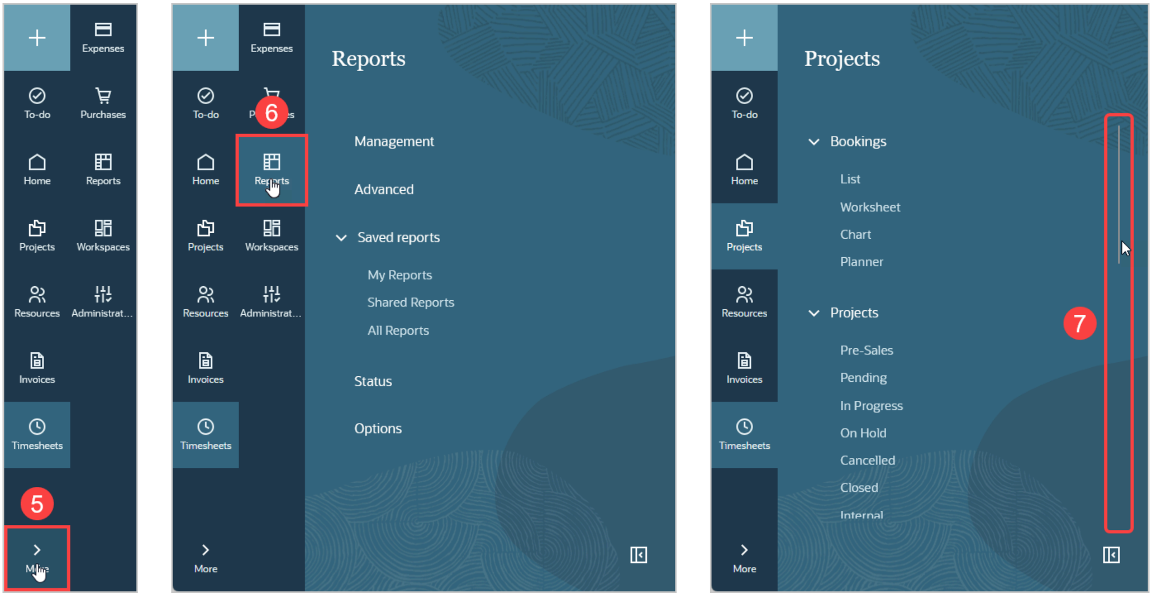
The main menu on the left of your browser window lists all the applications (modules) that you have access to. The menu item for each application shows the application icon and name with a black background.

The following table describes how to use the main menu.

1	Click one of the application icons to display a menu for that application. The **application menu** includes the pages and tools you have access to in the application grouped by functionality. The application you are currently using is highlighted with a lighter background color. If the application menu includes the page you are currently viewing, the menu item for that page is highlighted with a white color font and line.
2	If different pages and tools are available for a particular functionality, that functionality is listed in bold type with a caret next to the functionality header. Click the header to expand or collapse the list of available views and tools. Notice that the caret points up if the list of pages and tools is expanded, an down if it is collapsed.
3	Click any of the available options listed in a normal-weight font to go to the corresponding page. For example, to view a list of approved time off requests, click the **Timesheets** icon then click **Approved** under **Time off requests** in the Timesheets application menu. **Tip:** Hold the Shift key on your keyboard and click one of the menu items to open that page in a new browser window. Hold the Ctrl key and click the required option to open the page in a new browser tab.
4	Click the collapse icon or click anywhere outside the application menu to close it.
5	Depending on your screen size and resolution, there may not be sufficient space to display all the available applications in the main menu. Click on the more icon at the bottom of the main menu to show a continuation menu listing all the modules you have access to.

6	In the continuation menu, click one of the module icons to show the application menu.
7	Depending on your screen size and resolution, there may not be sufficient space to display all the menu items in the application menu (Projects, for example). In this case, use the scroll bar to scroll up and down the application menu.

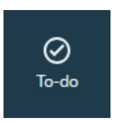




To-do list

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.

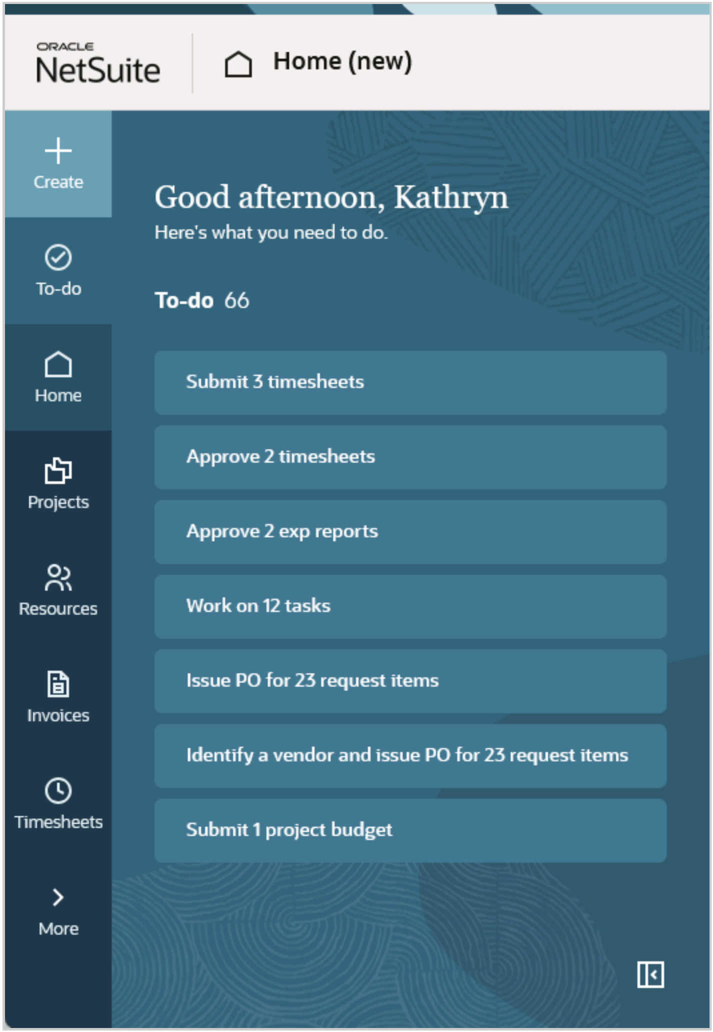
> **Note:** The to-do list includes all workflow tasks from the Reminders portlet on the classic homepage, and some workflow tasks from the My status portlet. Workflow tasks in the My status portlet for which you cannot take direct action are not included in the to-do list. For more information about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



Create Button

The **create** button is located on the upper-left corner between your company pictogram and the main menu.

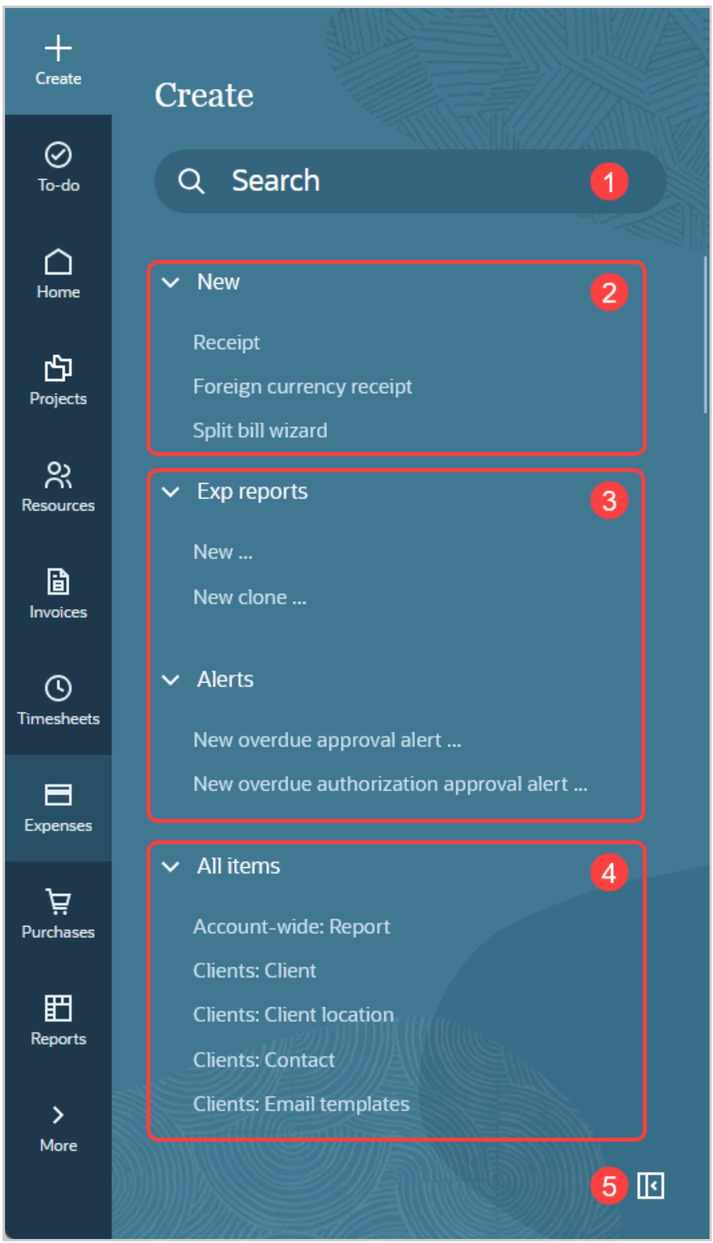
Click the **create** button to show a context-specific Create menu. The Create menu lists the create actions available within three different contexts: the page you are currently viewing, the application you are using, and throughout SuiteProjects Pro.

Click the create action for the item you want to create to go to the corresponding form.

> **Note:** The Create menu only lists the types of objects you can create according to your access profile.

The following table describes the elements of the create menu.

1	Enter the first characters of the item you want to create in the **search box**. The create menu is filtered as you type and only includes items containing your search string. Matching strings are highlighted in bold in the filtered menu.
2	**Page-related create actions** are listed first, if there are any. These are all the create actions available for the current page.
3	**Application-related create actions** are listed after the page-related create actions. These are all the create actions available for the application you are currently using.
4	**Global create actions** are listed after the application-related create actions. These are all the create actions available in SuiteProjects Pro according to your access profile.
5	Click the collapse icon or click anywhere outside the create menu to close it.



Getting Started with Global Search

The global search feature lets you search and quickly go to any of the create actions, lists, tools and administration settings pages in SuiteProjects Pro, or search for a customer, project, employee or resource.

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

To leave the global search page, click the cross icon in the upper-right corner or press Esc on your keyboard.

The global search page has the following components:

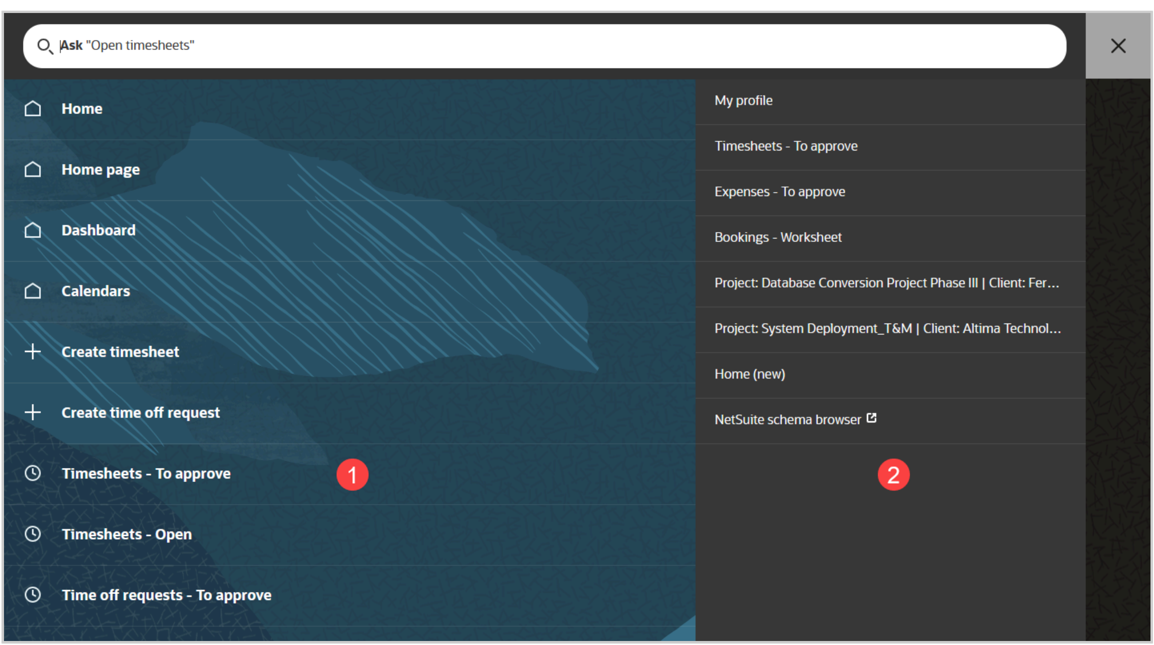
- Suggestions and Shortcuts
- Search

Suggestions and Shortcuts

The global search page initially shows navigation suggestions and your navigation shortcuts side-by-side.

1. The left panel shows a default list of navigation suggestions based on typical SuiteProjects Pro usage.
2. The right panel shows your navigation shortcuts. The shortcut list is the same as in the shortcuts menu. For more information about shortcuts, see Shortcuts.

The suggestions and shortcuts are replaced with search results when you start entering a term in the search bar.



Search

You can find what you're looking for using your own language and terms so you don’t have to memorize a hierarchical menu structure.

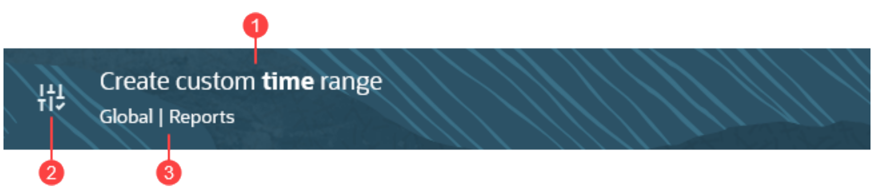
Enter a term or phrase in the search bar. Matching results show as you type. Parts of the search result entry that match or nearly match the search phrase are emphasized in bold font weight.

Click the search result entry to go to the corresponding page.

Search results include the following information:

1. Object name, settings page title, or create action title.
2. Object type or application (module) icon.
3. Application (module) name. For application settings, the search result entry shows the Administration application icon and the name of the application the settings applies to. For global settings, the search result entry shows "Global | <section>" where <section> is the name of the global settings section.
4. Additional information about the object.

   Click the name of a searchable object in the additional information to go to the page for that object. For example, click the customer name or the project owner name in the search result entry for a project to go to the demographic form for the customer or the employee.



You can search for:

- A navigation menu item (main navigation, create menu and user menu) – For example "timesheets", "create timesheet" or "personal settings".
- A customer, project or employee (resource) record. The following table lists the information you can search in addition to the object name, depending on the type of record you're looking for. Search results include the additional information in the order listed.

Record type	Information
Customer	Email, Customer owner, Active
Employee (Resource)	Employee ID (User ID), Email, City,
Project	Internal ID, Project stage, Customer, Project owner

Tip: When searching a project by internal ID, the search results may also include other objects matching the integer number. You can include additional information to refine your search if needed.

Note: Information in search entry results show an `[inactive]` flag next to a customer name, employee name (including for the customer owner and project owner), or project name if the customer, employee or project is not active and you have access to inactive objects.

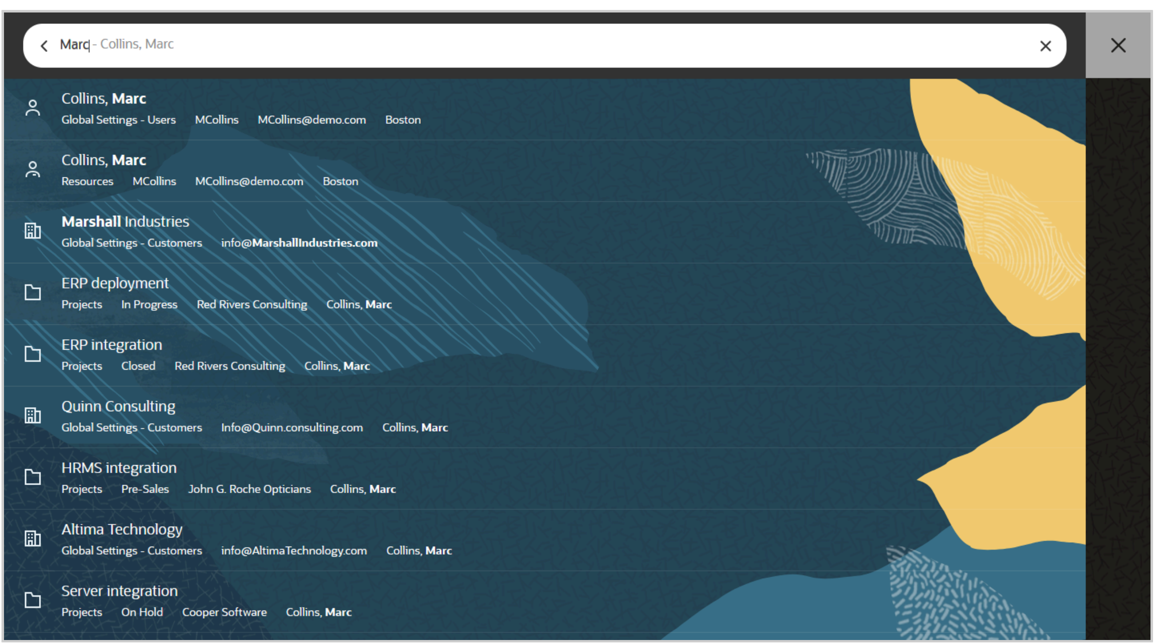
Two search result entries are returned for each named employee (resource) if you have access to the information in both the Administration (Employee record, demographic tab) and Resources (Resource record, profile tab) application (one for each navigation path).

The search functionality uses:

- Rotated search hints – The search bar shows hints one after the other until you start entering a term or phrase. You can use these hints as examples to construct your search phrase such as "Create timesheet", for example.
- Rapid type-ahead – As you start entering a term or phrase, the search bar shows a suggested search phrase. Click the suggested search phrase to use it for your search.
- Synonym match – Searching for "new envelope", "add expense report" or "create expense report" returns similar results, for example, because "new", "add" and "create" are synonyms, and "envelope" and "expense report" are also synonyms. This enables you to find what you're looking for even if you don't know what it's called in SuiteProjects Pro.
- Typo-tolerant match – A small error in the search phrase still returns near phrase matches in the search returns.
- Integrated business objects – The type-ahead uses the information from supported record type, and search results are shown as you type

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

Figure 1. Example of results obtained when searching for an employee's name.



User Menu

A material avatar with your initials or your profile picture displays in the upper-right corner.

Click the avatar to view the user menu. The user menu shows your name and role at the top.

Depending on your user and role privileges, you can access the following user settings, preferences and filters from the user menu.

- **Text size** — Select the text size for the main text on pages throughout SuiteProjects Pro.
- **Change Filter set** — If you have multiple filter sets available in your access profile, you can apply a different filter set. Click **Change Filter set** to show the list of available filter sets and select the filter set you want to apply. If your primary filter set gives you access to large amounts of information, you can change the filter set to limit the amount of records on lists, speed up loading times and improve the general performance of lists and other functionality.

  > **Note:** This option is only available if there is more than one filter set available to your access profile.

- **My profile** — Click **My profile** to display your resource profile. Depending on your access profile, you may be able to edit your resource profile or change your profile picture.

  > **Note:** This option is available depending on your access profile and only if the Consolidated Resource Profile optional feature is enabled for your company's SuiteProjects Pro account.

- **Personal settings** — Click **Personal settings** to show and change your personal settings. See Personal Settings
- **Password** — Click **Password** to show a form where you can change your password, set a password hint and, depending on your company's account configuration, set your security questions. See Changing your SuiteProjects Pro Password and Setting Up Security Questions.
- **Help Center** — Click **Help Center** to open the SuiteProjects Pro Help Center in a new browser tab. For more information, see the help topic SuiteProjects Pro Help Center.

  > **Note:** This option is available depending on your access profile.

- **Support** — Click **Support** to show the support page. You can use the support page to access SuiteAnswers, the SuiteProjects Pro user forum, release notes, and new release resources.

  > **Note:** This option is available depending on your access profile.

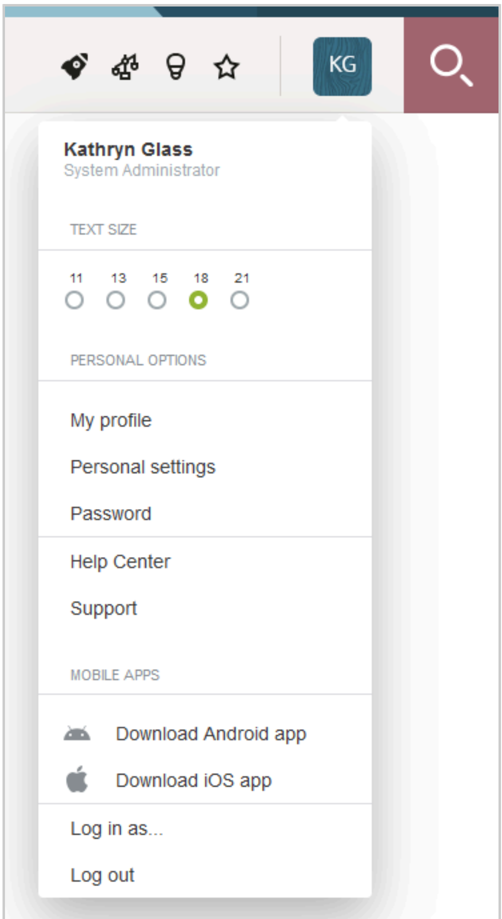
- **Mobile apps** — Click **Download Android app** or **Download iOS app** to open the SuiteProjects Pro Mobile app page in the Google Play Store (Android devices) or the App Store (iOS devices).

  > **Note:** These options are available depending on your company's account configuration and only if your access profiles allows you to use the SuiteProjects Pro Mobile app.

- **Proxies** — Click **Proxies** to enable other users to sign in to SuiteProjects Pro and perform tasks on your behalf.
- **Log in as ...** — Click **Log in as ...** to display the list of users you can proxy in as (sign in and perform tasks on behalf of), then click one user to open a new instance in a new browser tab and perform tasks on behalf of a colleague.

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

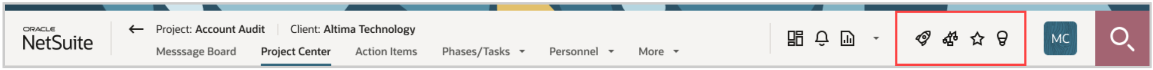
- **Log out** — Click **Log out** to sign out of SuiteProjects Pro and end your SuiteProjects Pro session.



Utility Buttons

Utility buttons are located in the upper-right corner, immediately to the left of the user menu. Your access profile determine the utility buttons you can see. They can include, from right to left:

- Shortcuts – Click the Shortcuts button ☆ to add shortcuts, edit shortcuts, or click shortcuts to go to your favorite pages in and outside SuiteProjects Pro.
- Contextual Tips – Click the Tips button to show a menu of quick links and contextual tips.
- Resource Comparison – Depending on your access profile, you can click the Resource Comparison button to show a list of resources currently selected for comparison.
- Product Updates – Depending on your access profile, you can click the Product Updates button to show a panel with new release highlights and other product updates.



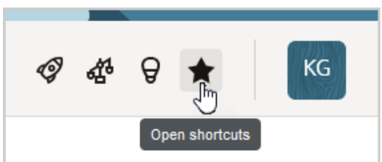
Shortcuts

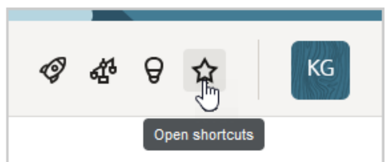
> **Note:** This utility button is only available if the Navigation Shortcuts feature is enabled for your company's SuiteProjects Pro account. When enabled, you can hide the shortcuts utility panel and functionality in your personal settings. See Optional Features.

Click the shortcuts utility button ☆ to view the shortcuts menu and go to your favorite pages in and outside SuiteProjects Pro from anywhere in SuiteProjects Pro.

If the Navigation Shortcuts is enabled in your company's SuiteProjects Pro account, you can:

- Access the shortcuts menu from any page in SuiteProjects Pro. To do so, click the shortcut utility button. The utility button shows a solid star icon instead of an outline star icon if a shortcut already exists for the current page.





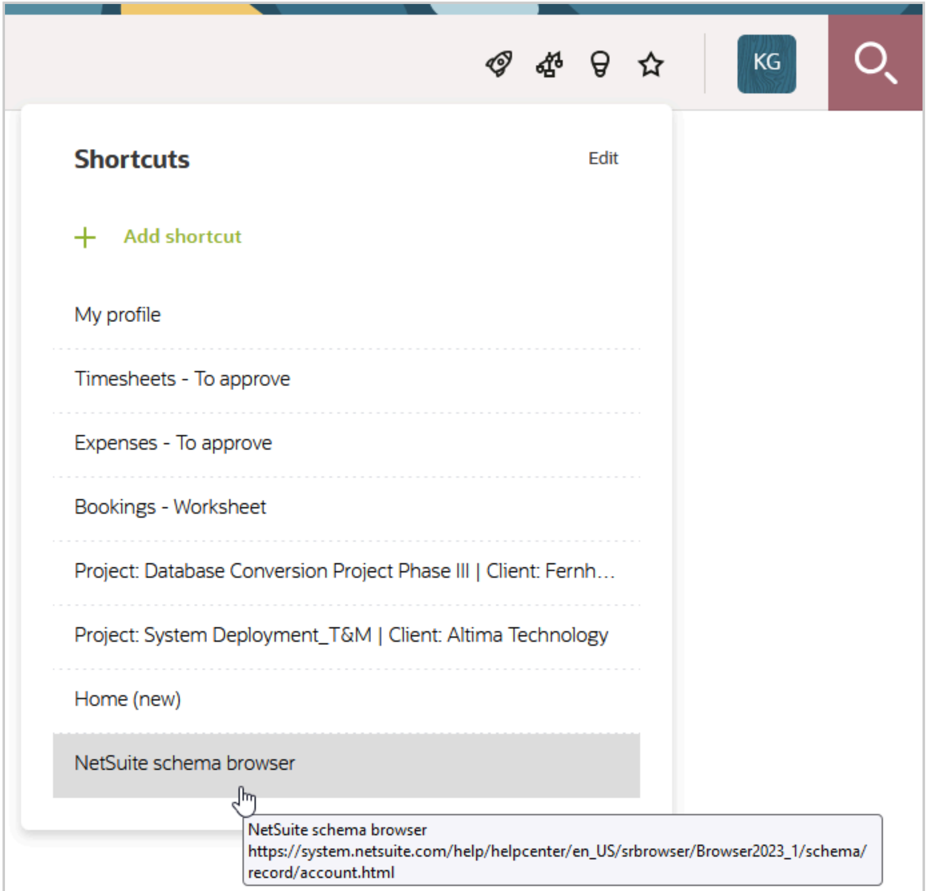
- Add shortcuts to any pages in SuiteProjects Pro including new record forms, specific tabs on specific records, report properties and report runs. See Adding a Shortcut to a Page in SuiteProjects Pro.
- Add shortcut to any external URLs. See Adding a shortcut to an external URL.
- Go to your favorite pages in and outside of SuiteProjects Pro.

> **Tip:** Point to a shortcut to see the full shortcut name and URL.

- Edit or delete your shortcuts. See Managing your shortcuts.

> **Note:** By default, you can have a maximum of 50 shortcuts in your shortcuts menu. Account administrators can reduce this maximum value.

To enable the Navigation Shortcuts feature go to Administration > Global Settings > Account > Optional features and check the **Enable shortcuts** box. You can also reduce the **maximum number of shortcuts user can save**. See the help topic Optional Features.



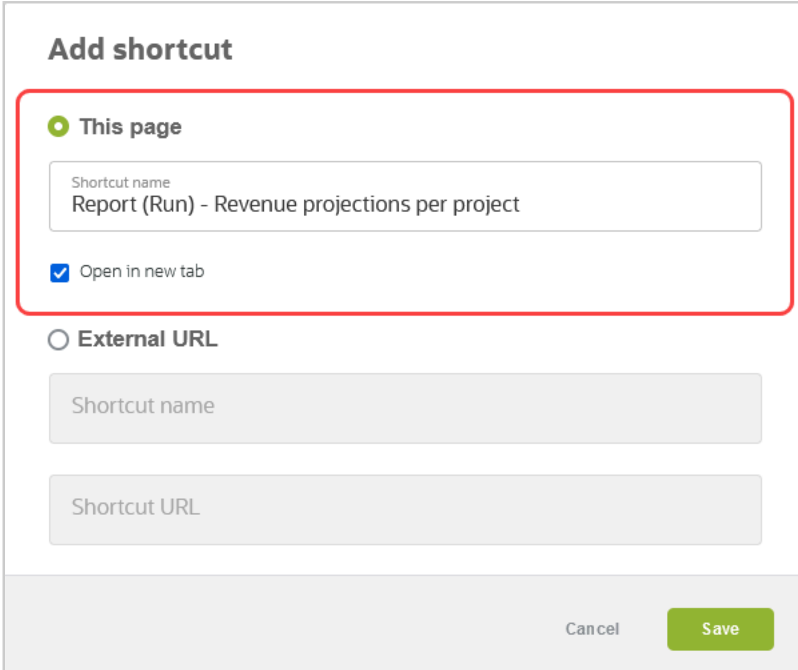
Adding a Shortcut to a Page in SuiteProjects Pro

Use the following steps to add a shortcut to any page in SuiteProjects Pro.

To add a shortcut to a page in SuiteProjects Pro:

1. Go to the page you want to add a shortcut for.
2. Click the shortcut utility button ☆.
3. Click **Add shortcut**.

   The Add shortcut window appears.



4. Select **This page**.

> **Note:** You cannot have more than one shortcut for the same SuiteProjects Pro page. You cannot select **This page** if a shortcut already exists for the page you are currently on.

5. Edit the default **Shortcut name**, if required. The name can be up to 128 characters long.
6. Check the **Open in a new tab** box if you want the page to open in a new browser tab when clicking the shortcut.
7. Click **Save**.

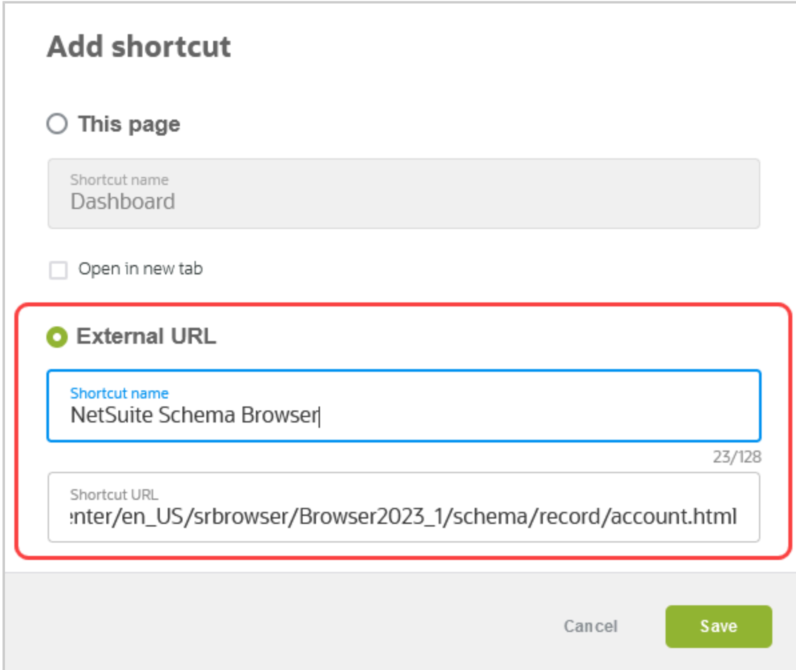
Adding a shortcut to an external URL

Use the following steps to add a shortcut to any external URL.

To add a shortcut to an external URL:

1. Copy the URL for the page you want to add a shortcut for.
2. Click the shortcut utility button from anywhere in SuiteProjects Pro.
3. Click **Add shortcut**.

   The Add shortcut window appears.



4. Select **External URL**.
5. Enter a **Shortcut name**. The name can be up to 128 characters long.
6. Paste the URL in the **Shortcut URL** box.

> **Note:** External URLs always open in new browser tab.

7. Click **Save**.

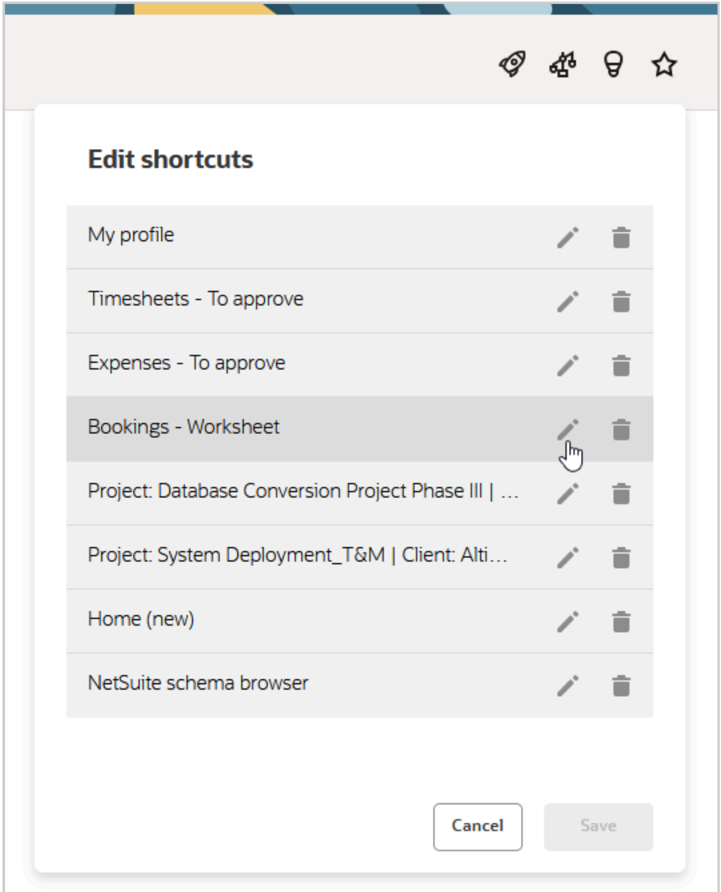
Managing your shortcuts

Use the following steps to edit or delete your existing shortcuts.

To manage your shortcuts:

1. Go to the shortcut menu from the shortcut utility button.
2. Click **Edit**.

   The Edit shortcuts panel appears in place of the shortcuts menu.



3. Do any of the following:
   - Click the edit icon to change the shortcut name or shortcut URL.

     The Edit shortcut window appears. It is similar to the Add shortcut window. See Adding a Shortcut to a Page in SuiteProjects Pro and Adding a shortcut to an external URL.
   - Drag a shortcut to change the order in which it appears in your shortcuts panel.
   - Click the delete icon to delete the shortcut.

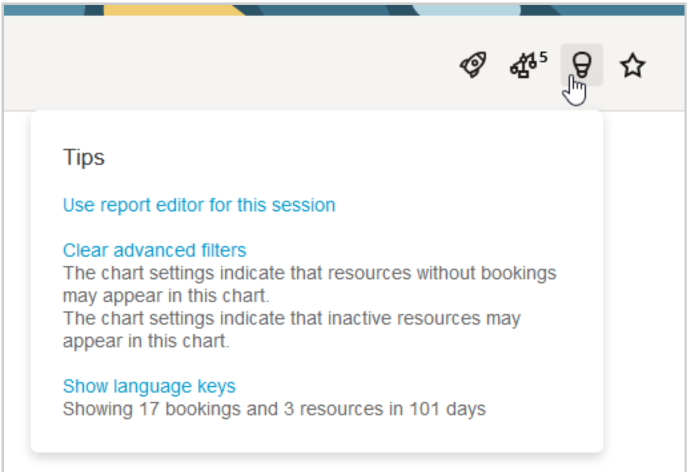
> **Important:** All changes you make in this step, including changes to the shortcut name and URL are only applied temporarily. You must save these changes in the next step.

4. Click **Save** to save your changes, or **Cancel** to discard your changes.

Contextual Tips

Click the Tips button to display contextual tips and information related to the page you are currently viewing or application you are currently using. It also contains quick access links to context-specific special actions available to your access profile.

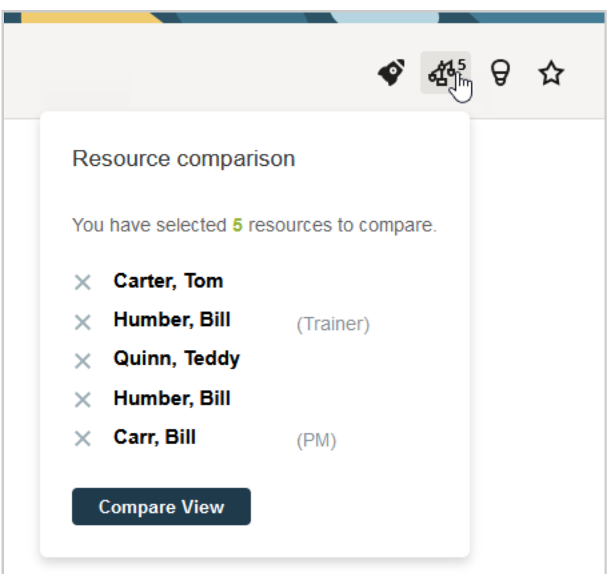
Note: Contextual tips are also available at the column and cell level on redesigned list views. See List Contextual Tips.



Resource Comparison

Note: This button is only available if your access profile includes the ability to use the Resources application and the Resource Comparison feature.

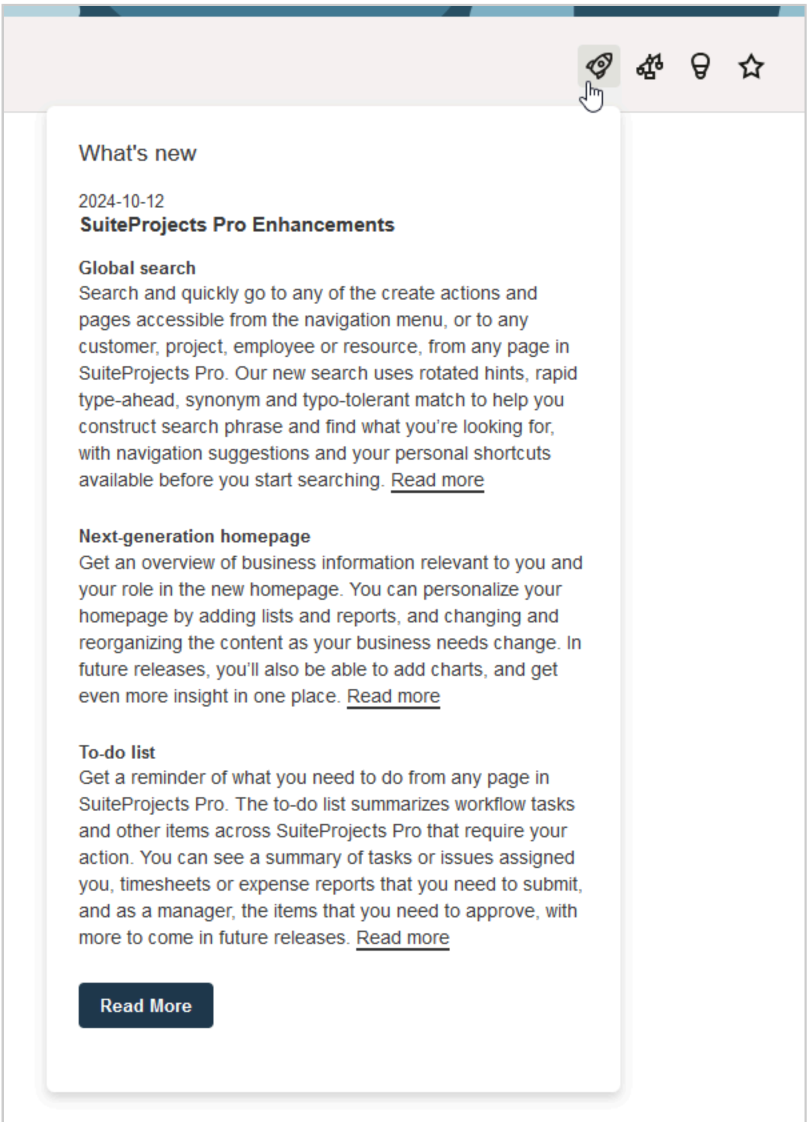
Click the Resource Comparison button to show a list of resources currently selected for comparison. Click the remove icon to remove a resource from the list. Click **Compare View** to open the Resource Compare View.



Product Updates

> **Note:** This button is only available if the Product Updates Panel feature is enabled for your company's SuiteProjects Pro account and if your access profile enables you to view the SuiteProjects Pro Help Center.

Click the Product Updates button to show 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. You can click **Read More** links for more information about each highlight, or to view the full release notes in the SuiteProjects Pro Help Center.



Canvas and Page Header

The canvas shows your business data organized into various visual layouts. Depending on the context and purpose, information is organized into forms, lists, charts, grids or worksheets.

The page header identifies the page or data you are currently viewing. For some data objects, such as projects, timesheets or expense reports, the page header also includes a secondary navigation menu with access to different information or tools related to the object you are viewing.

The content of the canvas and page header and the content format vary depending on the view. For more information, see the following topics:

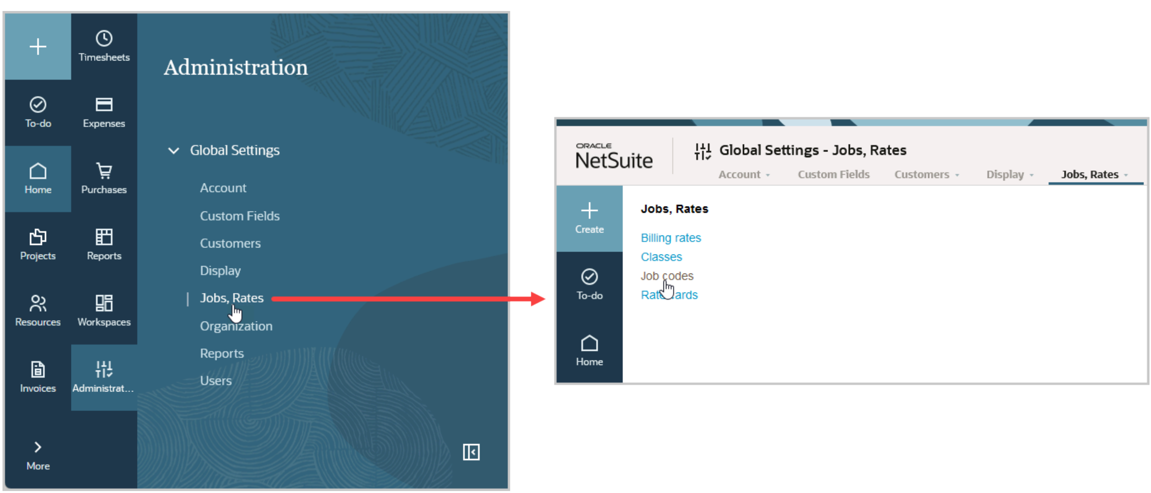
- Lists — Lists present bulk data in a linear way, providing a variety of tools for productive work.
- Records — Records may include data presented in different ways. In some cases, you may be able to access forms, grids, lists as well as other views and tools within a record. A secondary navigation menu located in the page header for these records, or record header, enables you to go to different elements of the record data and related tools.
- Administration Settings Page Navigation — Administrators control global and application settings in the Administration application. The administration global settings page header lets you move between the different settings forms and lists.

Administration Settings Page Navigation

Administration global and application settings have a page header with tab navigation and overview pages for each settings section or each application.

To go to an administration settings page from anywhere in SuiteProjects Pro:

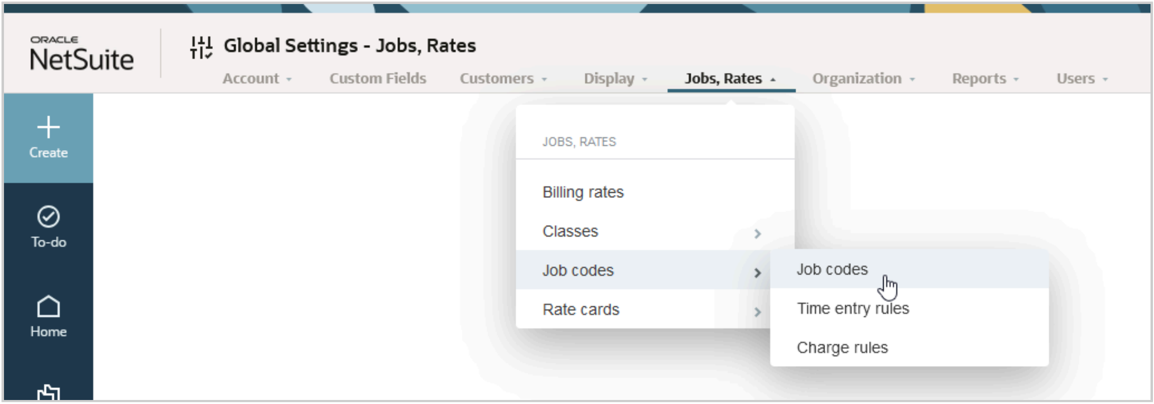
1. Click Administration in the Main Navigation menu. The Administration menu appears.
2. Click the relevant section under Global settings or Application settings. The section overview page appears.
3. Click the page required.



To move between global settings pages or application settings pages:

1. Click the relevant section heading in the page header.

   A submenu appears. The submenu includes a second level if pages include subtabs.
2. Click the page or subtab required.


ORACLE
NetSuite
Global Settings - Jobs, Rates
Account
Custom Fields
Customers
Display
Jobs, Rates
Organization
Reports
Users
Create
To-do
Home
JOBS, RATES
Billing rates
Classes
Job codes
Rate cards
Job codes
Time entry rules
Charge rules

Home Application

The Home application gives you an overview of your and your company's business performance, what you need to know and what you can or need to do.

If the Home application is set as the starting application in your personal settings, the first thing you see after you sign in to SuiteProjects Pro is the last page you visited in the Home application.

Depending on your access profile, the Home application can include the following elements:

- Home — Your homepage can include messages from your company, standard portlets with summary of information, as well as metrics such as charts and reports. See Homepage and Dashboards.
- Dashboard — Your dashboard can include charts and reports arranged in multiple tabs. See Homepage and Dashboards.
- Home (new) — An early version of the next-generation homepage was introduced in SuiteProjects Pro 2024.2. It is available in addition to (and not in replacement of) the other homepage because it does not currently offer a new solution for all the homepage functionality. However, you can start personalizing your homepage and include lists and reports to show the information that is relevant to you. See Getting Started with the Next-Generation Homepage.
- Calendars — Calendars let you see an overview of bookings, task assignments, time off requests, and work schedule, for you and other employees, depending on your access profile. See Calendars.

Homepage and Dashboards

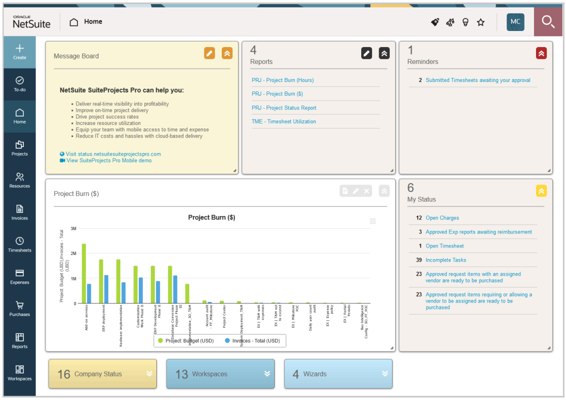
Your homepage shows content in a variety of portlets. Portlets are panels that show dynamic content updated either in real time or at regular intervals. Your homepage includes standard portlets and you can add or remove portlets showing report data as a table (reports) or in a visual way (charts).

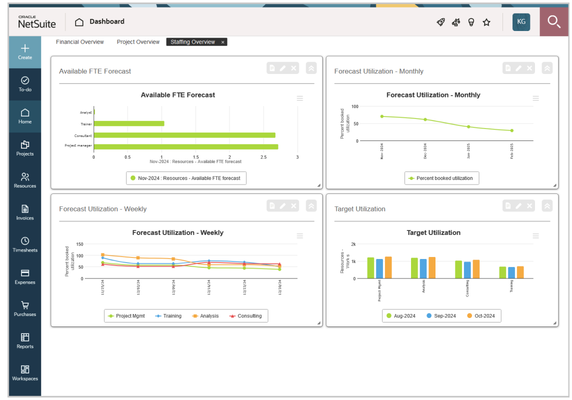
Depending on your access profile, the Home application also includes a dashboard page. Your dashboard shows content in portlets arranged in multiple tabs. For example, you may have one tab for financial information and another tab for resource utilization information. Your dashboard may include tabs and charts that your account administrators have set up for you. You can add or remove tabs to your dashboard, and add or remove portlets showing report data as a table (reports) or in a visual way (charts) in each tab.

Depending on your access profile, a dashboard is also available for each project. The project dashboard shows content relevant to a specific project.

For more information, see the following topics:

- Navigation
- Portlet Controls
- Standard Homepage Portlets
- Report Portlets
- Chart Portlets
- Dashboard Tabs
- Project Dashboard





Navigation

You can go to your homepage and your dashboard from anywhere in SuiteProjects Pro.

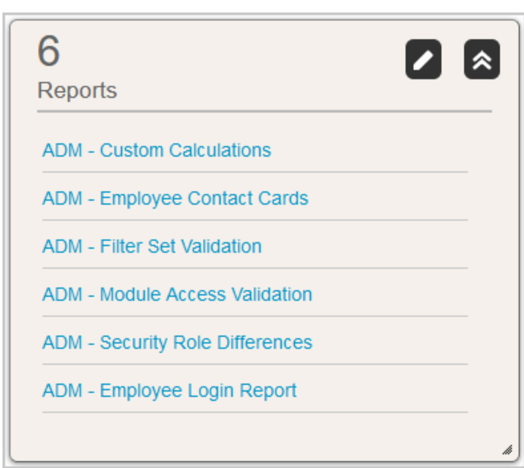
- To go to your homepage, go to Home > Home.
- To go to your dashboard, go to Home > Dashboard.
- To go to a project dashboard, go to Projects > Projects > [*Select a project stage*] > [*Select a project*] > Message board

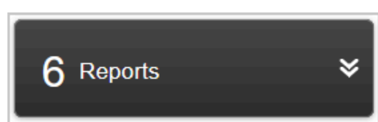
Portlet Controls

You can change the position and size of the portlets on your homepage, dashboard tabs, and project dashboards.

- Drag the title bar of a portlet to change the position of the portlet. Moving a portlet respects grid alignment and changes the position of other portlets depending on where you move it from and to.
- Drag the lower-right corner of the portlet to change the portlet size. In some cases, the content adapts automatically to the new portlet size. If the content is larger than the portlet, you can scroll through the content.

Portlets include two parts: title bar and content. You can also collapse portlets so that only the title bar is visible and expand them by clicking the collapse and expand icons.





The title bar of expanded portlets may show additional action icons, depending on the type of portlet:

- Click the Edit icon to change the portlet settings to controlling the information shown.
- (Chart and report portlets) Click the View report icon to view the report associated with the portlet in the Reports application.
- (Chart and report portlets) Click the Close icon to delete the portlet.

Standard Homepage Portlets

Depending on your account configuration and access profile, your homepage shows a combination of the following standard portlets:

- Message board – Your company can use the message board portlet to communicate important information to all users in the company or in your department. The message board portlet is always in the upper left corner of your homepage canvas. You can collapse, expand and resize it, but you cannot move it.
- Reminders – The reminders portlet includes information about workflow tasks that require your action such as timesheets, expense reports, or other information you need to review and approve. Click a link to go to the corresponding list of items to approve.
- My status – Your status portlet can include information about work (tasks and issues) that is assigned you and needs to be completed, depending on your account configuration, and other items that you are responsible for and need to submit such as open timesheets, expense reports or other information that is routed for approval.
- Company status – The company status portlet can include information about work (tasks and issues) that needs to be completed, depending on your account configuration, and information at various stages of the approval process. Typically, you would not have access to this portlet unless you are an account administrator or in a management role.
- Reports – The reports portlet lists a selection of reports you have access to and lets you run any of the listed reports from your homepage. Click the edit icon to modify the selection of reports. Click a link to run the corresponding report.
- Workspaces – The workspaces portlet lists workspaces you have access to. Click a link to go to the corresponding workspace.
- Wizards – The wizards portlet lists the wizards you have access to. You may have access to the American receipt import wizard which enables you to connect to an American Express online statement and download your receipts into a preexisting expense report. Typically, you would not have access to other wizards unless you are an account administrator or in a management role. Other wizards enable account administrators to perform advanced bulk change or maintenance tasks.

All standard homepage portlets except the message board portlets show the content as a list of links. The number of list items is indicated in the title bar.

It is not possible to remove a standard portlet that is visible on your homepage.

> **Note:** The to-do list introduced in SuiteProjects Pro 2024.2 includes all workflow tasks from the Reminders portlet, 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 To-do list.

Report Portlets

Report portlets enable you to show your report data on your homepage or dashboard.

The report portlet lets you:

- Sort you report data by one column in ascending or descending. To sort the data by a column or change the sort order, click the column header.
- Filter the report data. Enter a search string in the box under the column header to show only the rows with values containing the search string. You can use filters in multiple column.
- Change the width of columns. Drag the white line separating column headers toward horizontally to change the width of the column to the right of that separation line.

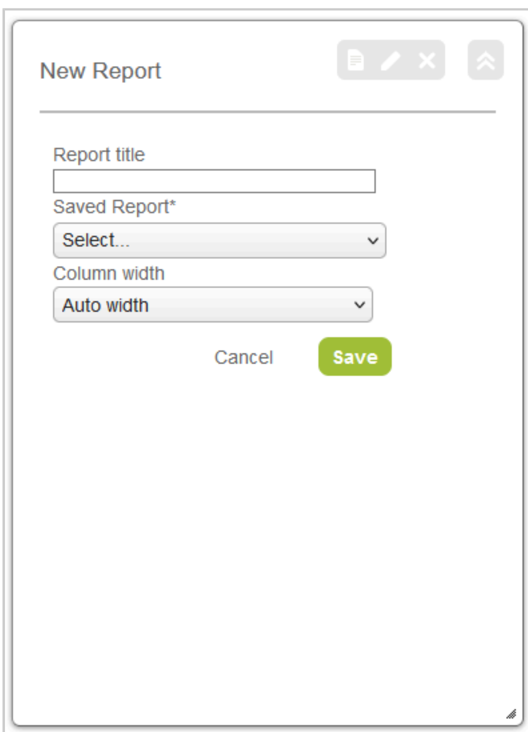
Review the following guidelines:

- Report portlets can only display a limited number of rows for performance reasons. The maximum number of rows depends on your account configuration. You should use filters to reduce the number of rows in your report to ensure that the report portlet shows the full report data.
- A report runs automatically when you go to your homepage or dashboard tab showing that report data, if the report did not run in the last 12 (or 24 hours ago, depending on your account configuration). The report also runs automatically whenever you click **Save** in the portlet setup.

To add and set up a report portlet:

1. From your homepage or your dashboard tab, click the Create button, then **New report**.

   A new report portlet appears on the canvas of your homepage or dashboard tab.

2. Enter a **Report title**. This is the text in the title bar of your report portlet. If not specified, the name of the selected report is used.
3. Select the **Saved report** that you want to show in the portlet.
4. Under **Column width**, select `Auto width` to change the column width automatically depending on the portlet width, or `Fixed width` to keep the same column width when you resize the portlet.
5. Click **Save**.

The portlet loads your report data.

6. Move and resize the portlet as required.

Chart Portlets

Chart portlets enable you to show report data in a visual way so that it is easier to interpret and compare.

The chart portlets let you interact with your data:

- Click the legend for the series to hide or to show again the series.
- Point to or near a data point to show a tooltip with information about the data point (Series, category and value).
- Click the menu icon ☰ to download the chart as a JPG, PDF, PNG or SVG file.

A report runs automatically when you go to your homepage or dashboard tab showing a chart using that report as data source, if the report did not run in the last 12 (or 24 hours ago, depending on your account configuration). The report also runs automatically whenever you click **Save** in the portlet setup.

Chart Types

Chart portlets currently support the following chart types:

- Area – Area charts, like line charts, show information as a series of data points connected by a line, but in an area chart, the area between the X-axis and the line segments is filled with color or a pattern. Three types of area charts are available:
  - Area – Single-series area chart where data points in a series are connected by straight line segments.
  - Area spline – Data points in a series are connected by smooth curves. Multiple series are plotted in front of each other.
  - Stacked area – Multiple series are plotted on top of each other instead of in front of each other.
- Bar – Bar charts visualize data as a set of rectangular bars, their lengths being proportional to the values they represent. Five types of bar charts are available:
  - Horizontal – Single-series bar chart where the horizontal axis shows the values, and the vertical axis shows the categories they belong to.
  - Vertical – Single-series bar chart where the vertical axis shows the values, and the horizontal axis shows the categories they belong to.
  - Multi-horizontal – Multiple-series horizontal bar chart where all series are represented by a rectangular bars placed side by side.
  - Multi-vertical – Multiple-series vertical bar chart where all series are represented by separate rectangular bars placed side by side.
  - Stacked-horizontal – Multiple-series horizontal bar chart where all series are stacked across a single rectangular bar.
  - Stacked-vertical – Multiple-series vertical bar chart where all series are stacked across a single rectangular bar.
- Line – Line charts show information as multiple series of data points connected by a smooth line. Two types of line charts are available:

    - Line – Without labels at data points.
    - Line with data labels – With labels at data points showing values.
- Pie – A pie chart is a circular chart looking like a pie divided into slices (sectors). Slices show the percentage each value contributes to a total, the area of each slice being proportional to the quantity it represents, and the circle representing 100%. Three types of pie charts are available:
    - Basic – Pie chart with multiple line labels.
    - Donut – Pie chart with a blank circular area in the center.
    - Pie with one line labels – Pie chart with single line labels.

> **Note:** All supported chart types except pie charts have two axes: a value axis that is used to measure data, and a category axis that is used to categorize data. Typically, the category axis is the horizontal axis (x-axis) and the value axis is the vertical axis (y-axis). For horizontal bar charts, the category axis is the vertical axis and the value axis is the horizontal axis.
>
> Pie charts use slices both to categorize data (category) and to measure data (values) as a percentage of a whole.
>
> All charts except pie charts, single-series area charts and single-series bar charts support multiple series. A series is a set of related data values, such as a line or one set of columns filled with the same color or pattern on a chart.

Adding and Setting Up a Chart Portlet

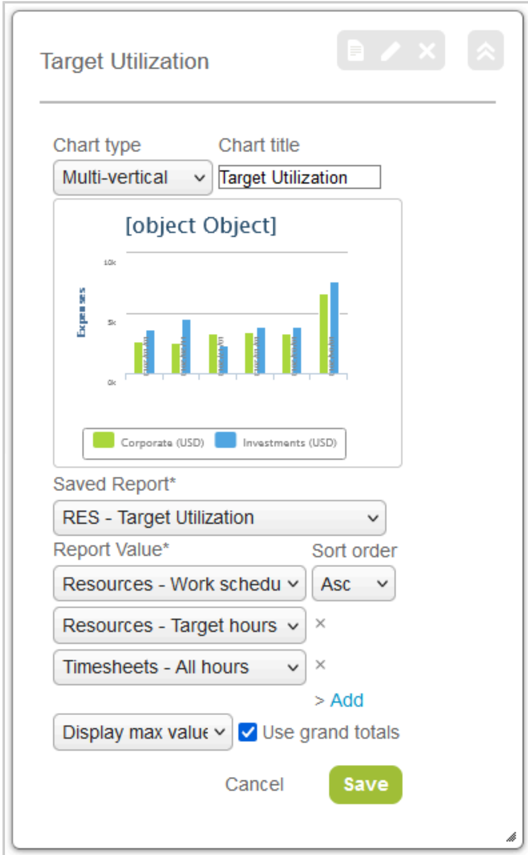
Several factors determine what the chart portlet show. Each chart portlet uses one of your reports as data source. Depending on the data you want to visualize, and how you want to visualize it, setting up your chart portlet starts with identifying, or creating, the report that will provide the data source for your chart. Your data source (report) determines the single or multiple report values you can select when setting up your chart portlet. Your data source (report) also determines the category axis or slices, and the series for your chart.

For more information about reports, see Working with Reports.

To add and set up a chart portlet:

1. From your homepage, your dashboard tab, or your project dashboard, click the Create button, then **New chart**.

   A new chart portlet appears on the canvas of your homepage or dashboard tab.



2. Select a **Chart type**.

   The chart settings form includes a preview of the selected chart type.
3. Enter a **Chart title**. This is the text in the title bar of your chart portlet and above the chart. If not specified, the name of the selected report is used.
4. Select the **Saved report** that you want to show in the portlet.

   > **Note:** Remember that the report you choose not only determines the single or multiple report values you can select when setting up your chart portlet, but it also determines the category axis or slices, and the series for your chart. Setting up a chart portlet often starts with creating a report for your chart.

5. Choose a **Report value** and a **Sort order**.

   The sort order determines the order of categories on the category axis based on the first report value selected for all charts except pie charts when the category axis is not a date axis.

   For chart types that support multiple series (all charts except pie charts, single-series area charts and single-series bar charts), you can choose multiple report values.

   To add a new report value:
   a. Click **Add**.
   b. Choose a **Report value**.
6. Select the number of values to plot (for each series). By default, the chart shows the maximum number of values, but you can limit the number of values to include the first few values only.
   - For pie charts, this allows to show the top *n* values as separate slices and group additional values under a slice labeled "Others".

> **Note:** The Others slice counts as one of the first values. To show the top *n* values as separate slices and others as a grouped slice, select `Display first <n+1> values`.

- For other charts, this allows you to limit the number of categories on the category axis if the category axis is not a date axis, or the number of series, otherwise.

7. (Optional) If the chart type supports multiple series, check the **Use grand totals** box.
   - If you selected multiple report values for the chart, the **Use grand totals** box changes the series and the category axis,
     - When cleared, the chart uses the first selected report value for the value axis. All other report values are ignored. If your report includes date columns, the dates are used for series, and sub-total rows in your report, are used for the category axis.
     - When checked, the chart uses selected report values as series and the columns that were used for series when the **Use grand totals** box was not checked (for example, dates) as category. Make sure that all selected report values have the same unit.
   - If you selected only one report value for the chart, the **Use grand totals** box changes the series.
     - When cleared, the chart uses the sub-total rows in your report as separate series.
     - When checked, the chart shows only one series which represents the sum of all separate series that were shown when the **Use grand totals** box was not checked.
8. Click **Save**.

   After some time, the portlet plots your chart.
9. Move and resize the portlet as required.

Dashboard Tabs

Your dashboard shows content in portlets arranged in multiple tabs. Your dashboard may include tabs and charts that your account administrators have set up for you. You can add or remove tabs to your dashboard.

To add a new tab to your dashboard:

1. From your homepage or your dashboard tab, click the Create button, then **New tab**.

Project Dashboard

Depending on your access profile, a dashboard is also available for each project. The project dashboard shows content relevant to a specific project.

Project dashboards can include:

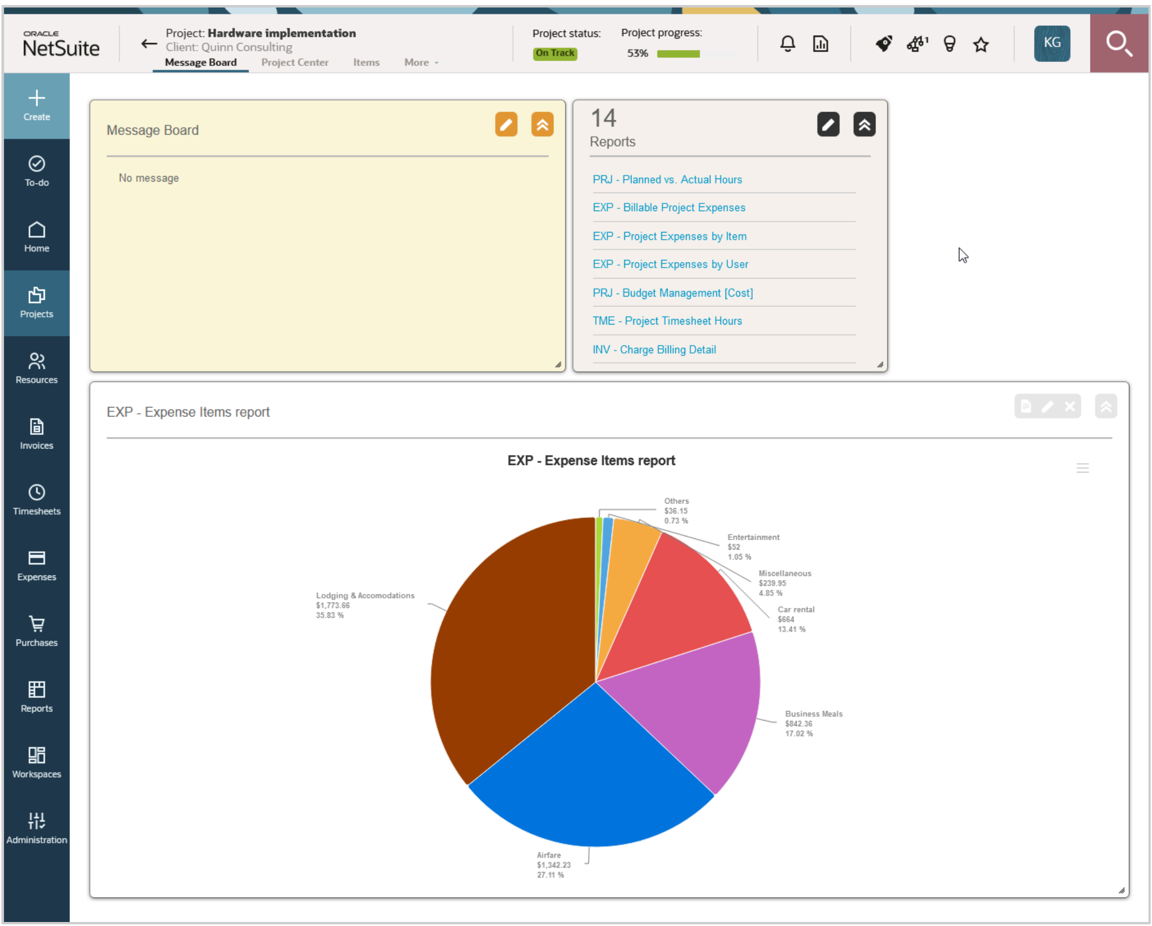
- Message board – Your company or project manager can use the message board portlet to communicate important information about the project. The message board portlet is always in the upper left corner of your project dashboard canvas. You can collapse, expand and resize it, but you cannot move it.
- Reports – The reports portlet lists a selection of reports you have access to and lets you run any of the listed reports from your project dashboard. Click the edit icon to modify the selection of reports. Click

a link to run the corresponding report. When running a report from the project dashboard, the report uses an additional filter to show only the information that is relevant to the current project.

> **Note:** All items displayed on the Project Dashboard are filtered by the specific project. Only saved reports with the "Make this report available in project-specific situations" option selected are shown in the Reports portlet and available to create Charts.

- Chart portlets – Chart portlets enable you to show report data in a visual way so that it is easier to interpret and compare. An additional filter is applied to the report to show only the information that is relevant to the current project. For more information, see Chart Portlets.

> **Note:** To be available as data source for report and chart portlets, reports must have the "Make this report available in project-specific situations" box checked in the report settings.



Getting Started with the Next-Generation Homepage

Depending on your company's account configuration, you may have access to the next-generation homepage. It is an early version that was introduced in SuiteProjects Pro 2024.2. It is available in addition to (and not in replacement of) the other homepage because it does not currently offer a new solution for all the homepage functionality. However, you can start personalizing your homepage and include lists and reports to show the information that is relevant to you.

> **Note:** 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 To-do list.

You can show up to 12 different sections of information in the next-generation homepage:

- The primary content region occupies a larger area in the top-left corner of your canvas. It lets you explore data in up to 10 separate tabs.

  If there are more tabs that can be shown, use the arrows on each end of the tab bar to view other tabs to the left or to the right.

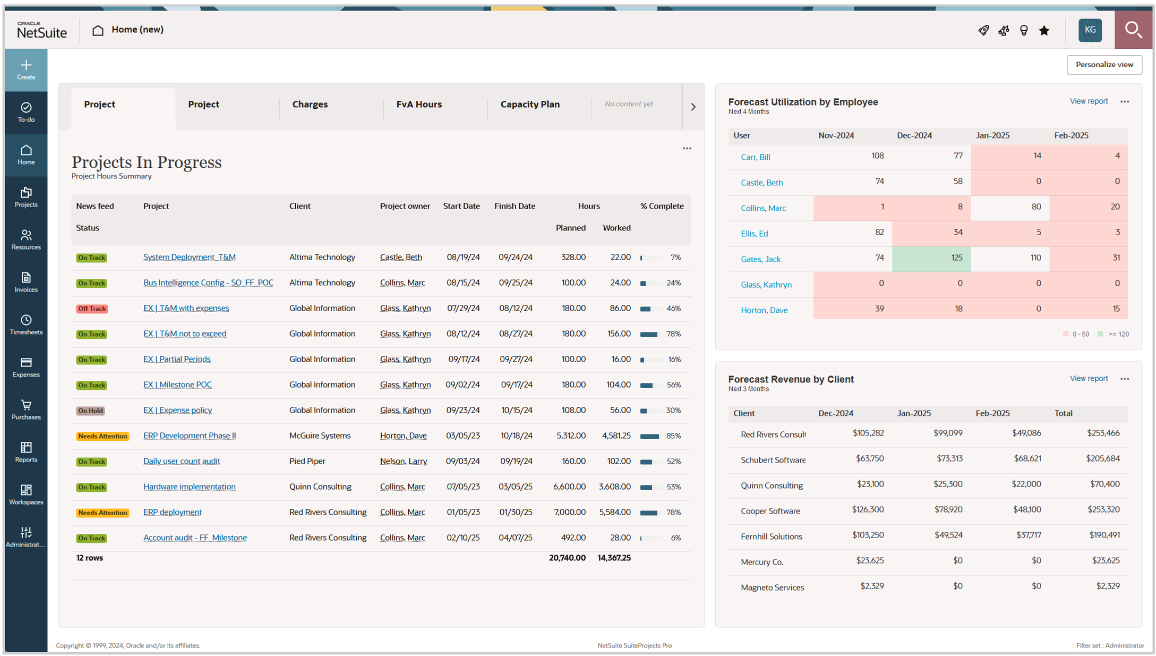
  Tab titles with ellipses at the end indicate that the title is truncated. Point to the tab title to view the full title.
- The secondary content regions occupy a smaller area to the right or below the primary content region. It lets you view two additional sections of information that are always visible on your homepage.

You can personalize the homepage, and add, reorganize and change the content in each region to suit your own business needs.

Currently 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 list views:
    - The list toolbar, page navigation and bulk action columns are not shown for lists on the homepage.
    - Lists on the homepage include the **Actions** column. You can use an action to run reports from a report list in the homepage, for example.
    - Lists on the homepage use a different visual style (background color for headers, font and font size, no line separators between columns).
    - 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 setup. The total row is always visible at the bottom of the list portlet and shows the number of rows visible in the list portlet and if there are the number of rows in the full-page list.
    - Lists on the homepage do not support inline-editing even if the full-page lists for the same object type supports inline-editing.
    - Changes to the full-page list view setup do not impact the homepage list. If you save changes to the list layout or list filter selected in the homepage list setup are reflected in your homepage.
  - Click the more icon in the upper-right corner of the content area and select:
    - **Collapse all** to collapse all collapsible rows in the list.
    - **Expand all** to expand all collapsible rows in the list.
    - **Set up list** to set up the homepage list.
- Report – You can show data from one of your reports on your homepage.
  - Reports on the homepage use a different visual style (background color for headers, font and font size, no line separators between columns).
  - If the full report uses color-coding, the color-coding legend is included in the bottom-right corner of the content area.
  - Click **View report** to go to the full report in the Reports application. On the full report page, you can use a back navigation link to go back to the homepage.
  - Click the more icon in the upper-right corner of the content area and select:

- **Collapse all** to collapse all collapsible rows in the report.
- **Expand all** to expand all collapsible rows in the report.
- **Refresh** to run the report and refresh the report data.
- **Set up report** to set up the homepage report.



Navigation

You can go to the next-generation homepage from anywhere in SuiteProjects Pro. To do so, go to Home > Home (new).

Personalizing the Next-Generation Homepage

You can personalize the homepage by adding, changing and reorganizing content in each region to suit your own business needs.

To personalize the next-generation homepage

1. On the homepage, click **Personalize view**

   The Personalize view drawer appears on the right.
2. In the Personalize view drawer, you can:
   - Review the list of content items in both content regions.
   - Edit each of the content regions. Click **Edit** to show the Edit region drawer. You can then add or delete content items from the region.
   - Drag a content item to change the order in which it appears in the region.
   - Delete a content item. Click the more icon then **Delete**.

> **Important:** All changes you make in this step, including changes to the content setup are only applied temporarily. You must save these changes in the next step.

3. Click **Save** to save your changes, or **Cancel** to discard your changes.

Editing a Content Region

You can add or remove content items in each region to suit your own business needs.

To edit a region:

1. On the homepage, click **Personalize view**

   The Personalize view drawer appears on the right.
2. In the Personalize view drawer, click **Edit region** next to the region you want to edit.

   The Edit region drawer appears. It lists the content of the region and the new content you can add. A counter next to the region title shows how many content items there are in the region, and how many content items you can have.
3. In the Edit region drawer, you can:
   - Add a new content item. Under the New section, click the type of content you want to add. This adds an empty content-item of the chosen type to the content region if the maximum number of content items for the region was not yet reached.
   - Delete a content item. Click the bin icon next to the content item you want to delete.
4. Click **Apply** to save changes temporarily and return to the Personalization drawer.

> **Important:** All changes you make in the Edit region drawer are only applied temporarily. You must click save in the Personalize view drawer to save the changes.

5. Click **Save**.

Setting up a content item

After you add a content item to a content region, you need to set up the content item.

To set up a content item:

1. Locate the content you want to edit on the homepage. In the upper-right corner of the content area, click the more icon then **Edit**.

   The Set up <content-type> drawer appears.
2. Select or enter all the setup information for your content item. When selecting an option from a dropdown list, such as an object type, for example, you can enter a few characters to filter the dropdown list as you type and show matching options only.

   The following table describes the setup information in the different form section for each content type.

Form section	List	Report
Data	- **Object type** – Select the type of records you want the list to show. If the object list in	- **Data source (report)** – Select one of your saved reports from the dropdown list.

Form section	List	Report
	SuiteProjects Pro includes several tabs (by approval status, or by stage, for example), an option corresponding to each tab is available in the dropdown list. ■ **List tab** – If the object list in SuiteProjects Pro includes several tabs (by approval status, or by stage, for example), an option corresponding to each tab is available in the dropdown list. Select the tab you want to show. ■ **List layout** – Select one of your saved list layouts associated with the selected object type. ■ **List filter** – (Optional) Select one of your saved list filters associated with the selected object type. You should use a list filter to limit the number of objects in your list because the homepage list can only show a limited number of rows. ■ **Number of rows** – Select the maximum number of rows you want to show.	The dropdown list shows up to 50 saved reports initially. To find a specific report, enter the report name in the search bar. The list is filtered as you type with matching terms highlighted in bold. If you have access to more than 50 reports, enter at least three characters from the report name and click **Search All** to find all matching values. The dropdown list shows up to 1,000 reports containing your search term. A message at the top of the dropdown suggests that you refine your search if there are more than 1,000 search results. ■ **Column width** – Select `Auto width` to change the column width automatically depending on the portlet width, or `Fixed width` to keep the same column width when the size of the content region changes.
Text	■ **<Content-type> title** – Enter a title for the homepage content item. The title shows above your list or report. ■ **<Content-type> subtitle** – (Optional) Enter a subtitle for the homepage content item. The subtitle shows under the title. ■ **<Content-type> description** – (Optional) Enter a description for the homepage content item.	
Tab	**Tab title** – Enter a tab title for your content-item. When there is more than one content item in the primary content region, there is a tab for each content item. If not specified, the list or report title is used.	

3. Click **Save** or press Enter.

Calendars

Depending on your access profile, calendars let you see an overview of bookings, task assignments, time off requests, and work schedule, for you and other employees.

Use the options in the upper-right corner to show a one calendar month, one week or one day calendar view.

Use the date navigation in the upper-left corner to select the day, week or month shown, go to the previous or next day, week or month (single arrow icons) , or go back or forward, a full week, month or year (double arrow icons).

Use the dropdown fields in the upper-left corner to select whose calendar you want to see.

- To view the calendars for a department or a group of employees defined by a metavalue, use the first dropdown field and select a department or metavalues such as *My direct reports*, *My direct and indirect reports*, *Employees booked or assigned to projects I manage*, for example. The second dropdown field lets you select an employee in that department or group. Calendar items for the selected employee are listed at the top for each day.
- To view the calendar for one employee only, clear the selection in the first dropdown field and do either of the following:
  - Use the second dropdown field to select an employee.
  - Click the search icon and enter the name of the employee. A list of matching results appears and is updated as you type. Click the name of the employee.

Note: Your access profile determines which department and employees you have access to. You can only see the calendars for the departments and employees that you have access to.

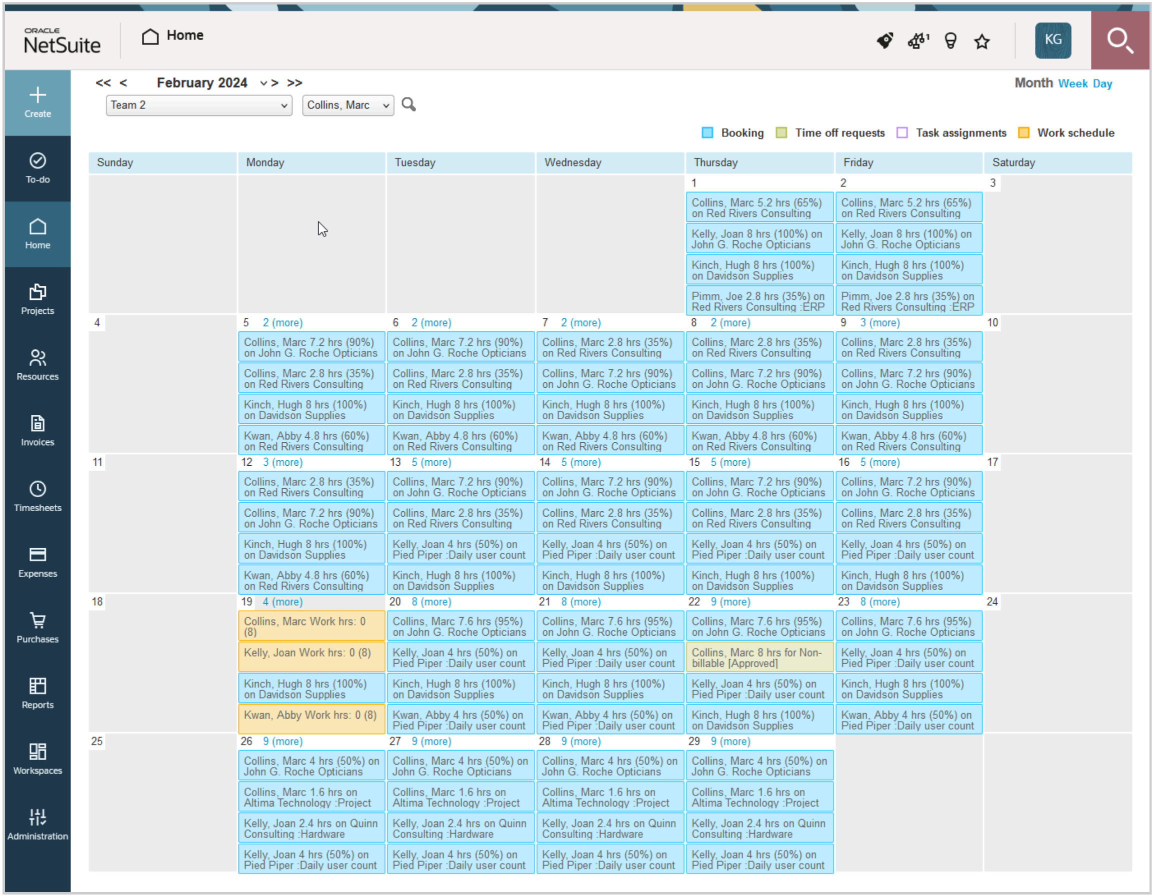
Calendar items are color-coded by type to help you identify them at a glance.

- In the week and month calendar view, each calendar item shows a summary text. The text shown depends on your SuiteProjects Pro account configuration.
- If there are more calendar items than can be shown in a calendar cell, the cell shows a link indicating the number of additional items. Click the link to view all calendar items for that day in a day calendar view. Depending on your access profile, you can control the number of calendar items that can be shown for each day in the month calendar view using the **Maximum number of rows to display per day in 'My Calendar' monthly view** personal setting. For more information about personal settings, see Personal Settings.
- The day calendar view shows a list of calendar items for that day by type, along with a summary, details, and notes. Click a link under **Summary** to go to the booking, task assignment, or time off request, or to view the schedule exception details.

Navigation

You can go to your calendars from anywhere in SuiteProjects Pro. To do so, go to Home > Calendars.

Depending on your account configuration and your access profile, you can add your calendar as a menu option in all applications ([*Choose an application*] > My Calendar). To do so, check the **Show My Calendar tab in all modules** box in your personal settings. For more information about personal settings, see Personal Settings.



Working with Lists and Records

All the information you work with in SuiteProjects Pro is organized and stored in records. These records are accessible from lists that include all records of a specified type. You can customize these list to display selected fields.

Lists

You can use lists to access individual records or to work with multiple records at one time.

To access lists, click ab application icon in the main navigation menu and select a relevant view from the application menu. See Navigating SuiteProjects Pro.

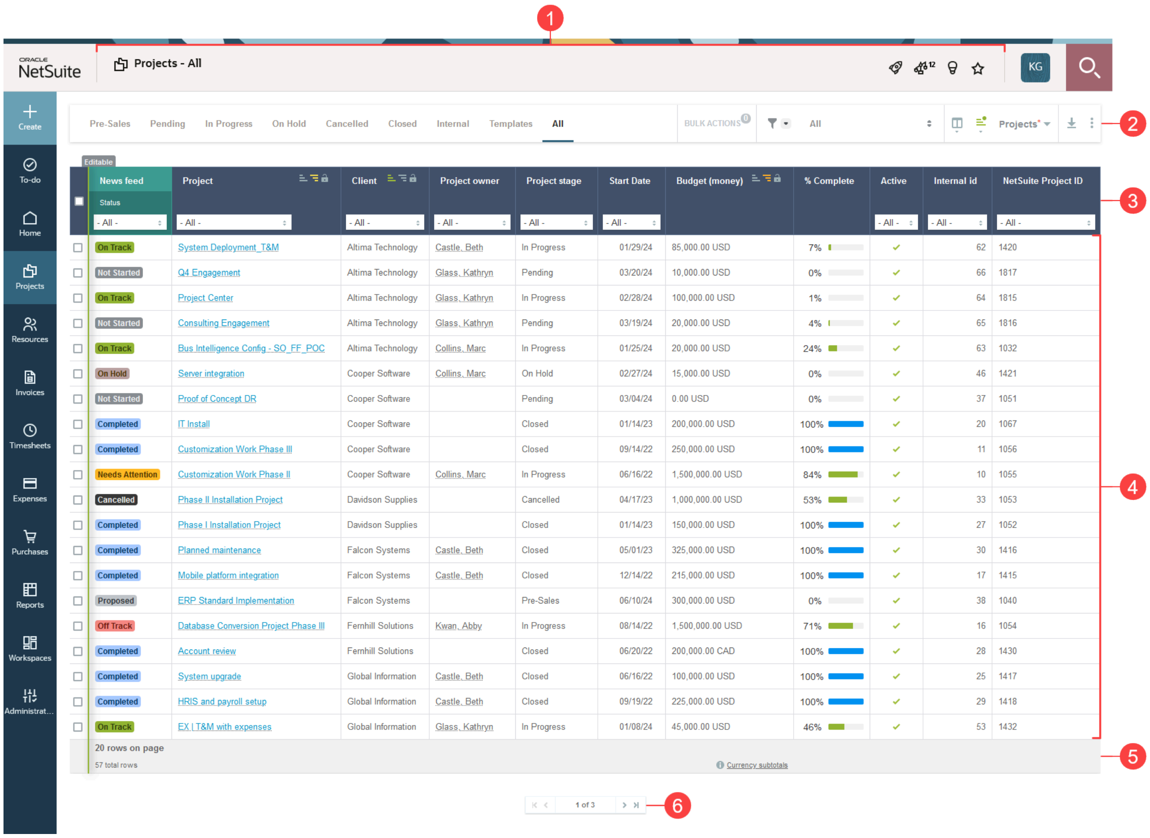
Some lists are also accessible as part of a specific record. See Records.

Lists available within a record, or in-record lists, offer the same features as lists available from the application menu.

This section describes the common features for redesigned list views. Some of these features let you customize the list to your requirements. Any changes you make before leaving a list, signing out of SuiteProjects Pro or closing the browser, will be remembered the next time you go to that list. You may also save different layouts for your lists and switch between any saved layouts rapidly. See Personalized List Layouts

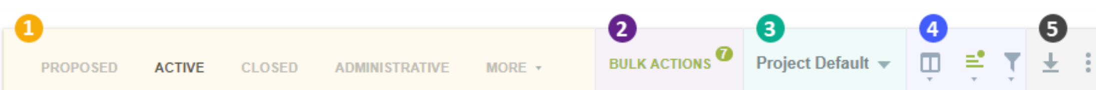
> **Note:** Not all lists use the redesigned list layout and functionality.
>
> For a list of lists using the redesigned layout and functionality, see Feature Changes in the Redesigned User Experience.
>
> For information about lists using the previous UI layout and functionality, see Lists — Previous UI Version Layout.

1	**Page header** — The page header indicates the page or the record you are currently viewing. If the list is part of a record, the page header also includes an in-record navigation menu. See Record Header.
2	**List toolbar** — The toolbar lets you switch between different tabs and gives you access to options and tools. See List Toolbar and Navigating the List.
3	**Column headers** — You can access additional tools and controls in the column headers. See List Column Headers.
4	**List data** — From the list data, you can use optional features to access more information or edit data directly from the list. See List Data.
5	**Column totals** — The totals for the current page are displayed in bold at the bottom of the numeric columns and the totals for the whole data across all list pages are displayed underneath the page totals. The total number of rows in the page and in across all list pages are displayed at the bottom of the first non-numeric column. You can enable or disable column totals using a toggle on the more options panel. See Other List Options.
6	**Page navigation** — Use the page navigation bar to go to the item you need quickly. See Navigating the List.



List Toolbar

The list toolbar includes 5 sections giving you quick access to different list tabs and tools. You can also press a shortcut key to access certain tools.



1	**Tab navigation** — Click one of the tabs or views to go to a different list tab or to a different view accessible from the list. See Navigating the List.
2	**Bulk actions** — Use the bulk action utility to make changes to any number of selected items in one go. Shortcut key: B. See Bulk Actions.
3	**List layouts** — Save your list layout for later use, load one of your saved layouts and share them with colleagues. Shortcut key: L. See Personalized List Layouts.
4	**Data** — Control what data is included in your list and how it is displayed. The tools in the data panel grouping include: **Columns** — Select the columns you want to display and set the column order. Shortcut key: C. See Selecting List Columns. **Sort** — Sort your list data by column using up to three sorting levels in ascending or descending order. Shortcut key: O. See Sorting the List Data.

	Advanced Filters — Apply advanced filters to restrict the number of list entries according to set criteria. Shortcut key: F. See Filtering Options.
5	**Download** — Download your list data as a CSV, HTML or PDF file and import/read your data in your spreadsheet, word processing or PDF tools. See Download Your List Data. **More options** — Control the number of rows per page, enable column totals or clear filters. See Other List Options.

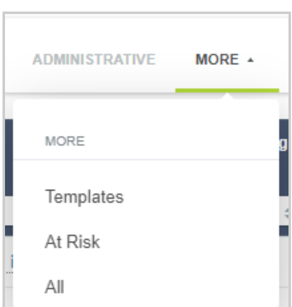
Navigating the List

Lists offer tab navigation and page navigation.

- **Tab navigation** — Click one of the tabs in the list toolbar to go to a different list tab or to a different view accessible from the list.
  - The available options depend on the particular list you are viewing. For example, in the Projects list, each tab represents a project Stage.

For items with an approval status, such as bookings, timesheets or expenses, each list tab represent a status — Open, Submitted, To approve, Approved, Rejected, Archived, and All. For some lists, such as the bookings list, the navigation panel also includes other views and tools accessible from the list. For example, in the bookings list, the tab/view navigation panel may also include links to the Advanced Booking Worksheet, Booking Chart and Resource Booking Planner, depending on the features enabled in your company's SuiteProjects Pro account.

  - If there is not sufficient space to display all the available tab options, click the **More** header with a small caret next to it to display a continuation menu.

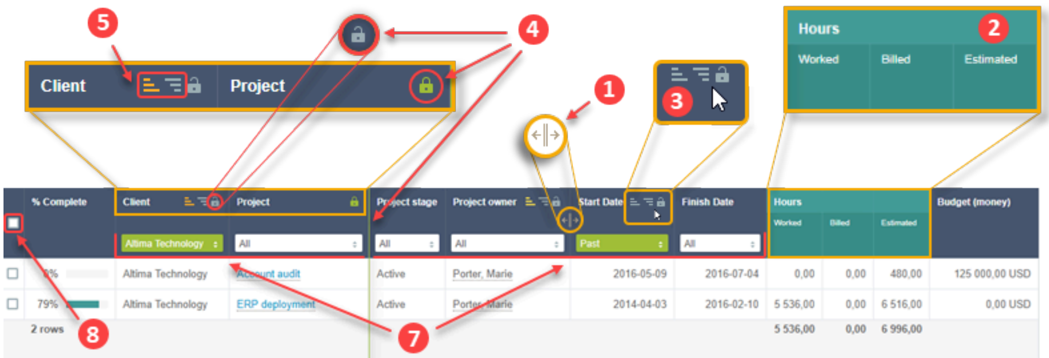


- **Page navigation** — Click the navigation arrows to go to the first, previous, next or last page of list data or click on the page number and type the page number you want to go to and press the Enter to go straight to that page of list data.

List Column Headers

You can access several tools and display options directly from the column headers bar:

1	**Column width** — By default, column widths are calculated to provide an optimum fit between the list content and the available canvas space. **To change the width of a column:** 1. Point to the column border. 2. When the mouse pointer changes to a resize cursor, drag the column border to the required width. **Note:** Consider the following: - Full use of the available canvas space takes precedence over custom column width. If you change the width of a column, the width of other columns may also change to ensure the list occupies the full canvas width. You may not be able to reduce a column width below a certain limit. - If you set custom column widths manually and leave the list, these custom column widths will continue to apply the next time you go to the list. - Custom column widths are saved as part of your custom list layout. See Personalized List Layouts.
2	**Column category** — Column headers are displayed on a dark blue color background unless the field or column falls under a field grouping or column category. If the column falls under a field grouping or column category, the column header is split vertically with the column title at the bottom displayed on a green color background and the column category at the top displayed on a lighter green color background. If two or more adjacent columns fall under the same category, the column category shows as one merged cell across those columns.
3	**Column options** — The available option icons are hidden unless one of the options is enabled for the column. Point to the column header to display the available option icons, which may include the sort ascending, sort descending and column lock icons. If one of the column option is enabled, the available option icons continue to display when you move the pointer away from the column header.
4	**Column lock** — Click the column lock icon to lock the list to that column. Everything to the left of the locked column will stay in view when you scroll horizontally. Notice the green locked column icon next to the title of the locked column and the green column border running through the entire list. Click the locked icon to unlock the column or click the lock icon for another column to change the locked column.
5	**Sort** — Point to the column title to display the option icons for the column and click the sort ascending icon or sort descending icon next to the column title to sort your list data using up to three sorting levels in ascending or descending order. See Sorting the List Data.
6	**Column tips** — The column options include an information icon if contextual tips are available for the column. Click the information icon to view contextual tips relevant to the column. See List Contextual Tips.
7	**Column filters** — Use column filters to restrict the number of list entries. See Filtering Options.
8	Check the box in the **Bulk actions** column header to select all items on the page or click the clear all icon to clear all selected items in the list. See Bulk Actions
8	Expand All / Collapse All — The workspace documents list lets you expand and collapse all folders in the document tree by clicking the expand all icon and collapse all icon in the **Name** column header.



Bulk Actions

The Bulk Actions feature allows you to make changes to any number of selected items at the same time.

Note: Account administrators can control who can access bulk actions for expenses, timesheets, employees, projects, bookings, charges, invoices, billing transactions, and recognition transactions lists by role permission. Go to Administration > Employees > Roles > [*Select a role*] and check the **Disallow the use of bulk actions in <record type> list views** box to disable bulk actions for that role and list.

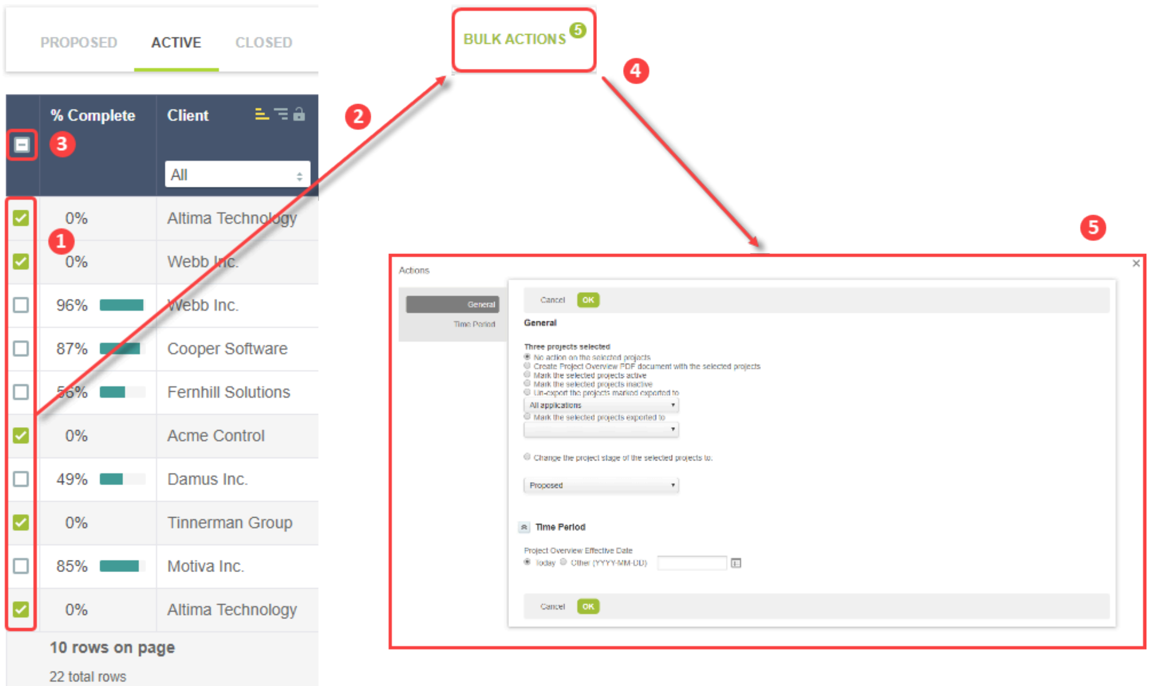
If bulk actions are available for the list and enabled for your role:

- The bulk actions column is always the first column on the left and shows a box for each row in the list.
- The list toolbar includes the bulk actions panel.

Otherwise, the bulk actions column and toolbar panel are not available.

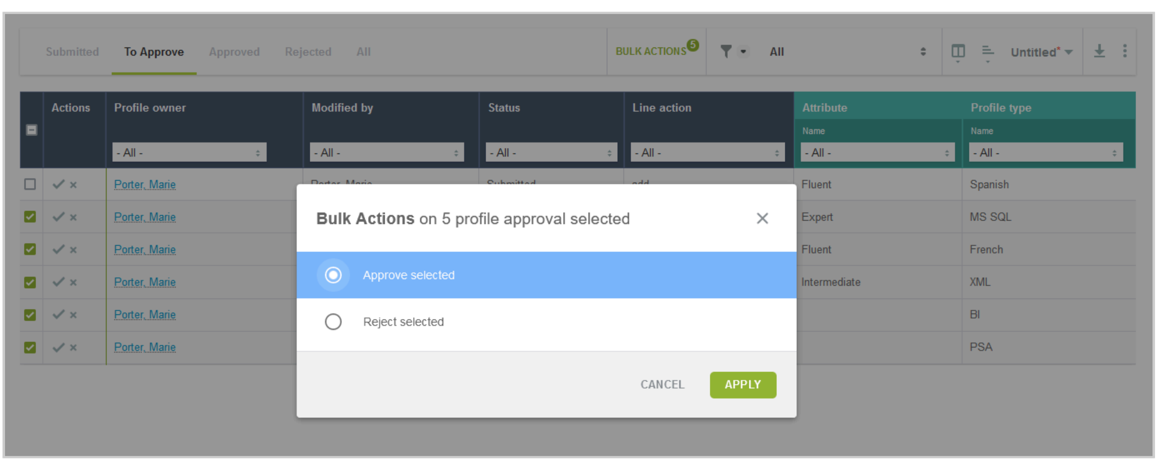
To use bulk actions:

1	Check the box next to the items you want to select. Selected rows are shown with a light gray color background and a green checked box in the bulk actions column.
2	The bulk actions panel in the list toolbar is highlighted in green whenever items are selected and indicates the number of selected rows across the entire list.
3	Check the box in the column headers to select all items on the page or click the clear all icon to clear all selected items in the list.
4	Click **Bulk Actions** in the toolbar or press B on your keyboard to open the Actions dialog.
5	Select the actions as required and press **OK**. The available actions depend on the items and on your role permissions.



The following lists feature a redesigned Bulk actions dialog:

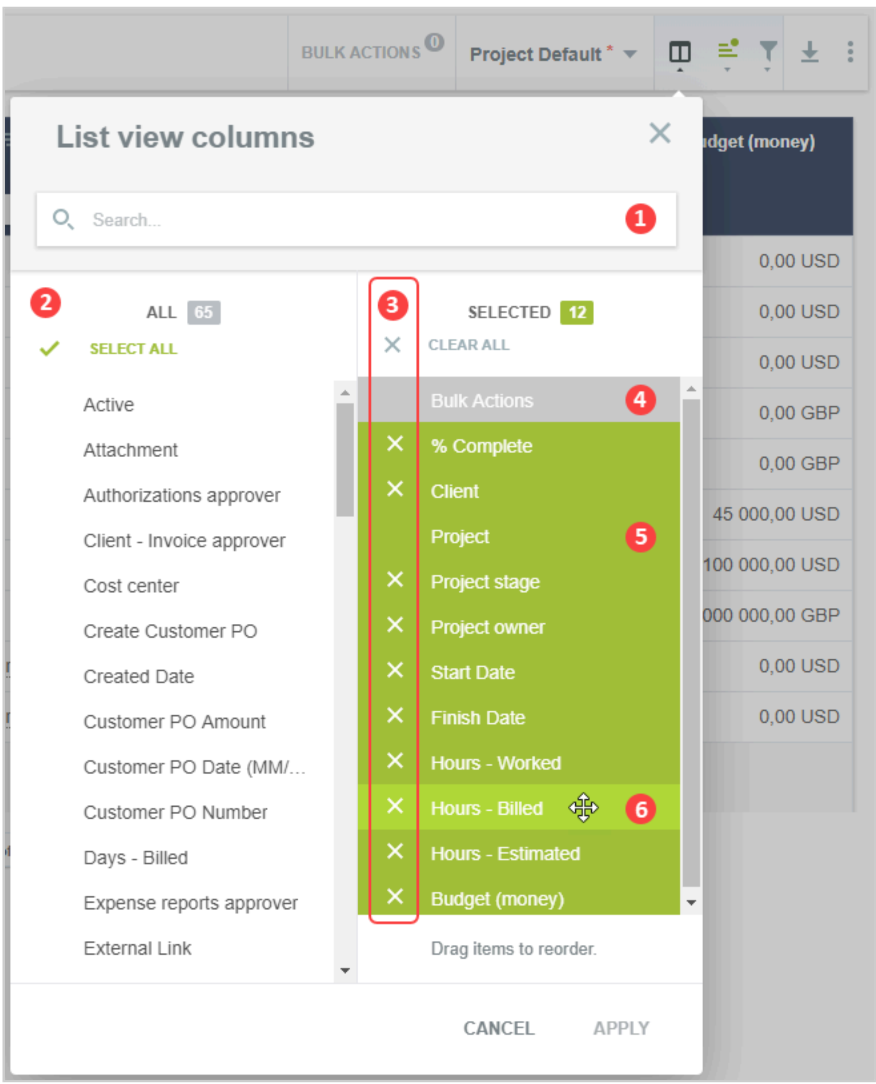
- Reports > Saved Reports
- Resources > Profile approval > To approve
- Workspaces > Documents
- Workspaces > [*Select a workspace*] > Documents



Selecting List Columns

Click the Columns icon in the list panel or press C on your keyboard to display the **List columns** flyout panel. Select the columns you want to include in the active list and specify the column order. Click **Apply** to validate your changes and return to your list. Any column preferences applied to a list continue to apply the next time you go to the same list until you change them or switch to a different list layout.

1	Type any characters from a column title in the **search box**. The lists of available and selected list columns are filtered as you type and only includes the column titles containing the string you have typed. Matching strings are highlighted in bold in the filtered column list.
2	Click a Column title to include the column in the list or click **Select all** to include all available columns.
3	Click the remove icon × next to a selected column title to remove it from the list or click **Clear all** to remove all selected columns.
4	Some columns, for example **Bulk actions** or **Actions**, are required and set to display as the first columns on the left. You cannot remove them from the list nor change their position. These columns are displayed with a gray color background.
5	Some columns are required but can be reordered. For example, you cannot remove the Project column from a Project list but you can change its position. These columns do not have the remove icon × next to the column title.
6	Click a column to select it then drag the selected column to change its position.



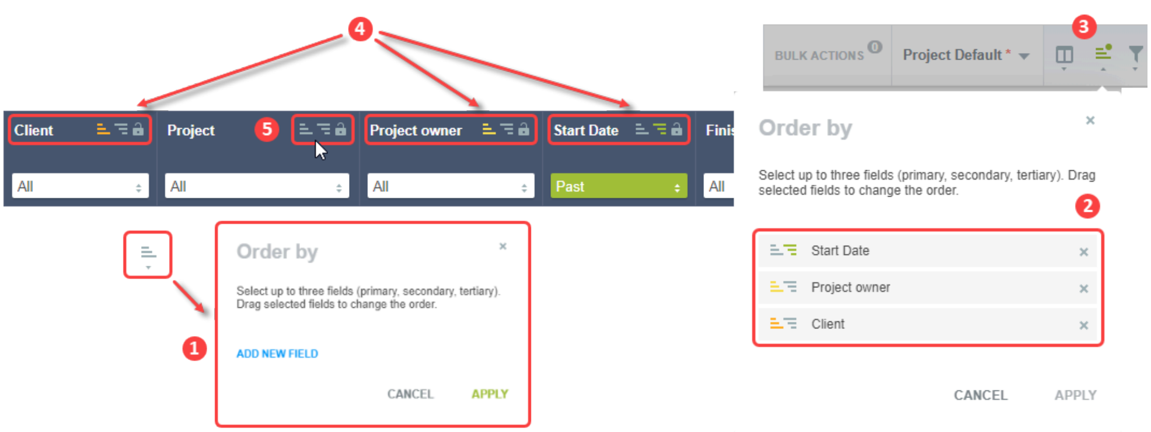
Tip: You can save these column preferences as part of a custom list layout. See Personalized List Layouts.

Sorting the List Data

You can sort your data using the **Order by** panel accessible from the list toolbar or the sort options available in the column headers. Both methods work together.

This feature supports ascending and descending sort options and multi-level sorting up to three levels. Any sort order applied to a list continues to apply the next time you go to the same list until you change it or switch to a different list layout.

1	Click the sort icon in the list toolbar or press O on your keyboard. The **Order by** panel displays. Click **Add New Field** and select up to three fields to sort by.
2	The fields are displayed in the **Order by** panel. Click one of the icons next to the field name to select between an ascending sort order or a descending sort order. Drag the fields up or down to determine the order of your sorting levels. The sorting levels are color-coded — green for the primary, yellow for the secondary, and orange for the tertiary sort field. In the pictured example below, the list data is sorted by Start date in descending order, then by Project owner in descending order, and finally by Customer in descending order. Click the remove icon next to a field name to clear that sorting level and stop using that field to order your list. Click **Apply** to validate your changes and return to the list.
3	Notice the sort icon is displayed in green color with a dot to indicate that sorting options have been set for the list.
4	Notice the column headers also indicate the sort order and sorting levels with icons similar to those in the **Order by** flyout panel.
5	You can also sort your data directly from the column headers. Point to the column title to display the option icons for the column. Click the Sort Ascending or Sort Descending icons. The icons show in green, yellow or orange color if the sort option is enabled for that column. You can set up to three sorting levels. The first sort icon you click will make that column the primary sort field. The second and third sort icons you click will make these columns the secondary and tertiary sort fields, respectively. When you have set all three sorting levels, the sort icons no longer display for the remaining columns. Click an active sort icon to clear that sort level if you want to sort your data by another column.



Tip: You can save the sort order settings as part of a custom list layout. See Personalized List Layouts.

Important: Sorting is disabled if the list contains more than a threshold number of rows. The threshold depends on the configuration of your company's SuiteProjects Pro account.

- A message appears at the top of the list column headers if the number of rows exceeds the threshold: “Sorting is disabled for lists containing more than `<threshold>` rows. To reduce the number of rows and restore full functionality, use advanced filters. See Advanced Filters.
- You can still use the **Order by** panel and the sort ascending or descending buttons. However, any changes will have no effect on the order your list data is displayed if the number of rows exceeds the threshold.

Filtering Options

You can limit the data displayed in the list based on criteria you specify. There are two features you can use to achieve this:

- Column Filters — Searchable dropdown options accessible directly from the column headers bar let you limit your data by matching fields to specific values or range of values.
- Advanced Filters — Flexible filtering options accessible from the list toolbar let you refine your list to show exactly the data you need.

Column Filters

Column filters are dropdown boxes located in the column headers bar. Click the dropdown box to display a searchable list of value options. Select the desired options to set the column filter.

Depending on the column, the value options will be listed in one of the following formats:

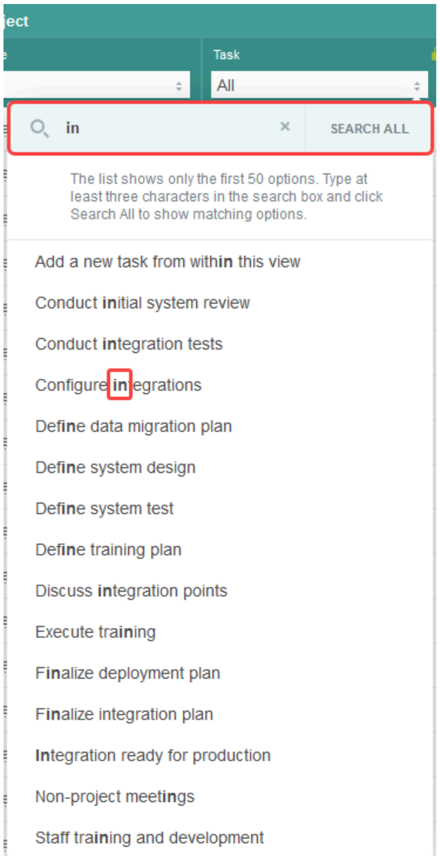
- Distinct values: All (default), List of distinct values. Non-unique values only appear one time.
- Alphabetical: All (default), First alphabetical and numerical character [A-Z, 0-9].
- Date: All (default), List of redefined date ranges.

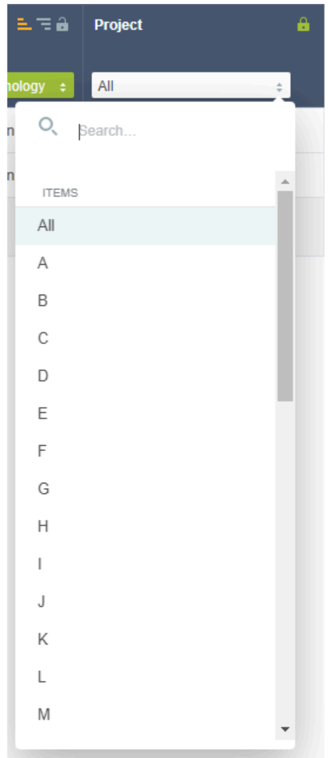
The feature includes the following characteristics. Column filters are:

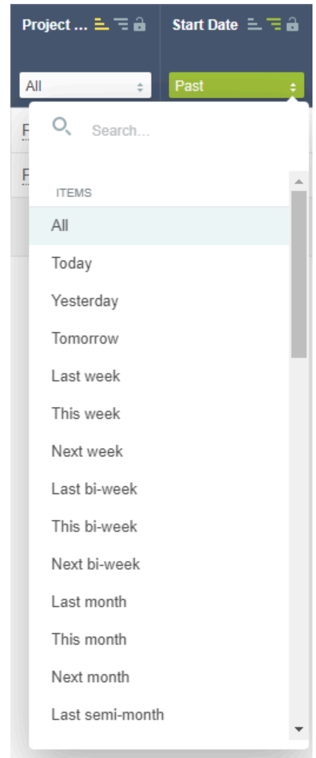
- Searchable — Type any number of characters in the dropdown search box to display only the options containing your search string. The list of available value options is filtered as you type. Matching strings are highlighted in bold in the filtered options list.

> **Note:** Distinct value column filter dropdowns show up to 50 options initially.
>
> To show distinct value options that are not included in the initial list, type at least three characters in the search box. The list of distinct value options is filtered as you type with matching terms highlighted in bold. Filtering as you type only filters through the 50 distinct values loaded initially. To search for all matching values, click **Search All**.
>
> The dropdown will show a list of up to 1000 distinct values containing your search term. 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 as necessary until there are less than 1000 matching values, then type additional characters to filter the search results.
>
> If there are less than 50 distinct values in the column filter dropdown, no search is required. All possible options may already be listed if other filters are already used to refine the list data. For example, if you are using column filters on the project or resource columns, to refine the list data, there may be less than 50 distinct value options for the tasks column filter, in which case the dropdown shows all options, and a search is not required.

- Easily identifiable — When a column filter is applied, the column filter dropdown box is highlighted with a green color background and shows the selected filter option. Multiple column filters — You can apply multiple column filters to the list.
- Remembered — Any column filters applied to a list continue to apply the next time you go to the same list.
- Easily cleared — To clear all column filters applied to the list, click the List options icon ⋮ and click Clear column filters from the List options dropdown panel.







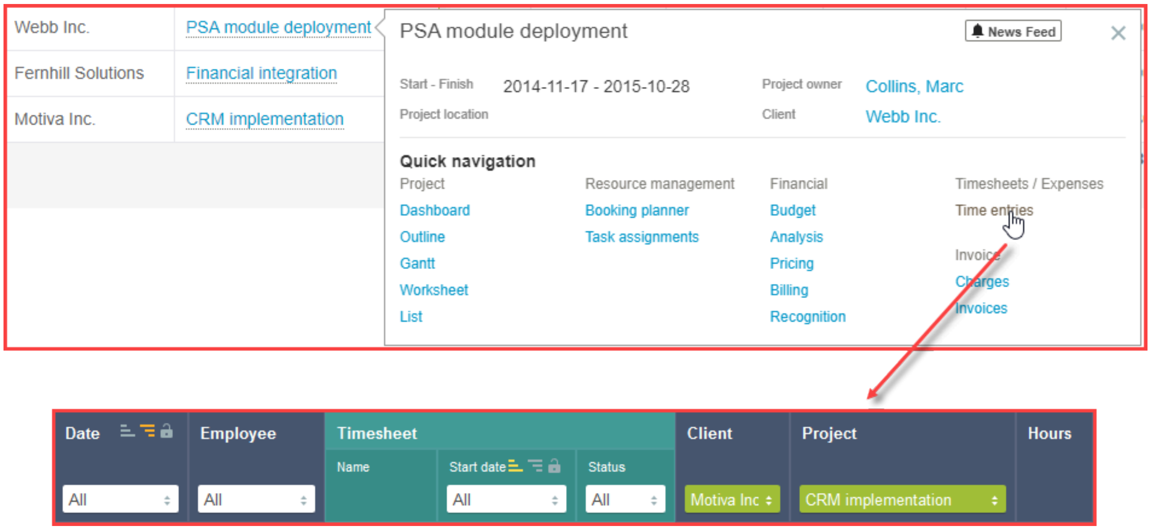
Tip: You can save any combination of column filters as part of a custom list layout. See Personalized List Layouts.

Opening a List from QuickViews and Other Pages — Preset Column Filters

You can go to specific lists by clicking links available in a QuickView window, in other pages such as the Booking chart or the Assignments chart, or in some of the portlets, such as the My Status portlet, on the homepage. When you click a link in a QuickView or Booking chart which refers to a list, the list opens with predefined column filters already applied. The column filters are set to list context-specific data in them list.

For example:

- QuickViews give you access to additional information, actions and quick navigation options for certain items in any lists — See QuickViews. The QuickView for a Project will include quick navigation links to Time entries, Receipts, Charges and Invoices lists. Clicking one of these links opens a list showing only the Time entries, Receipts, Charges and Invoices for that specific Project. The column filters for the Project and Customer columns will be preset when the list displays.
- The Booking chart lets you see booking data in a visual chart and gives you an overview of bookings for one or more employees. Clicking on a bar in the chart opens the Bookings list showing only the bookings for the selected Resource, or all bookings, for a specific period of time. The column filters for the Resource, Start date and End date columns will be preset when the List displays.



Note: Review the following guidelines:

- Filtered columns will be automatically added to the list if not present in the active or remembered list layout.
- Date Column filters are preset to custom date ranges matching a period of time in the Booking chart. These custom date ranges are temporary and will not be available in the dropdown options after you have cleared or changed the value for that column filter.
- Opening a List using a quick navigation link in a QuickView or in the Booking chart overrides the remembered list layout. The Column filters will continue to apply the next time you go to that List unless you clear or change the values set for those column filters.
- Column filters are not currently preset when opening to a list by clicking a quick navigation link in the Assignment chart.

Advanced Filters

Advanced filters are accessible from the list toolbar and let you refine your list using filter conditions to show exactly the data you need.

Tip: Use advanced filters to reduce your list data and only include the data directly relevant to your task. This will help your lists load faster and in some cases may restore full functionality to your lists. See List Data.

Click the Filter icon in the list toolbar or press F on your keyboard to show or hide the advanced filters panel under the list toolbar. If an advanced filter is currently applied to your list, the Filter icon is displayed in green color.

Currently, two versions of the advanced filters user interface are available. Both have similar functionality but different layouts.

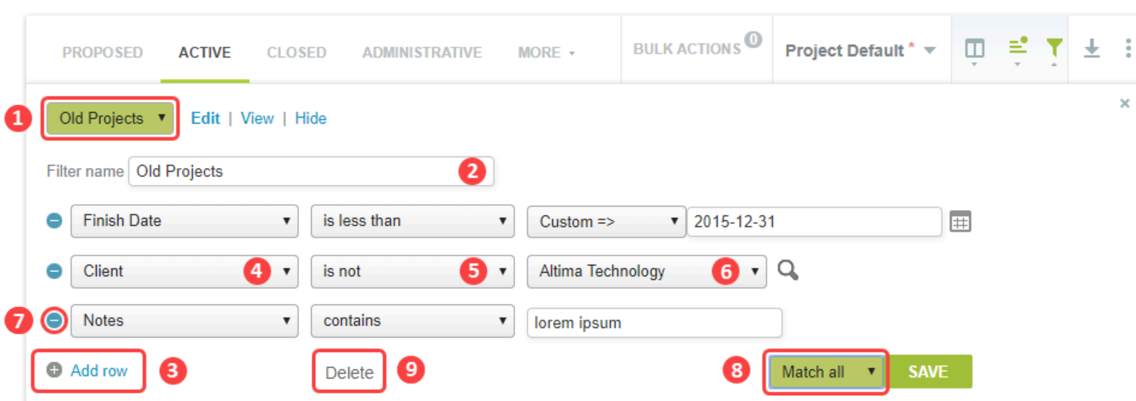
- Default Advanced Filters UI — The default advanced filters user interface lists filter conditions vertically (one filter condition per line). For complex filters. You select and apply a filter from the flyout panel and not from the toolbar.

- Redesigned Advanced Filters (Optional Feature) — 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. The new layout brings better usability and takes less of your canvas space.

Default Advanced Filters UI

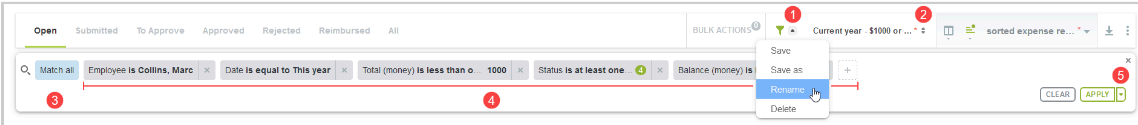
The default advanced filters user interface lists filter conditions vertically (one filter condition per line). For complex filters. You select and apply a filter from the flyout panel and not from the toolbar.

1	Click the dropdown to select one of your saved Advanced Filters or create a new one. Click Edit to modify the filter settings, View to display the filter criteria or Hide to display only the filter name. Select **All** from the dropdown to disable any Advanced filter currently applied to your list.
2	Give your advanced filters a descriptive name so you can re-use them in future. After you have set or modified the filter condition, click **Save** to validate your changes and return to your list.
3	Click **Add row** to add a new filter condition.
4	Click the dropdown box further left in the filter condition row to select a field.
5	Click the middle dropdown box to select a comparison operator from the available options.
6	Depending on the chosen field and comparison operator, define a value or a range of values by either typing, selecting a value or range from predefined dropdown options, or setting a custom value.
7	Click the Delete row icon next to a row to delete that criterion.
8	Click the dropdown field and select **Match all** if the results must match all specified filter conditions (AND logical operator) or select **Match any** if the results must meet at least one of the specified filter conditions (OR logical operator). **Note:** The default logical operator for list advanced filters is **Match all**. Whenever possible, set advanced filters to match all specified filter conditions for optimum list performance.
9	Click **Delete** to delete the saved advanced filter. The deleted advanced filter will no longer be available for selection.



Redesigned Advanced Filters (Optional Feature)

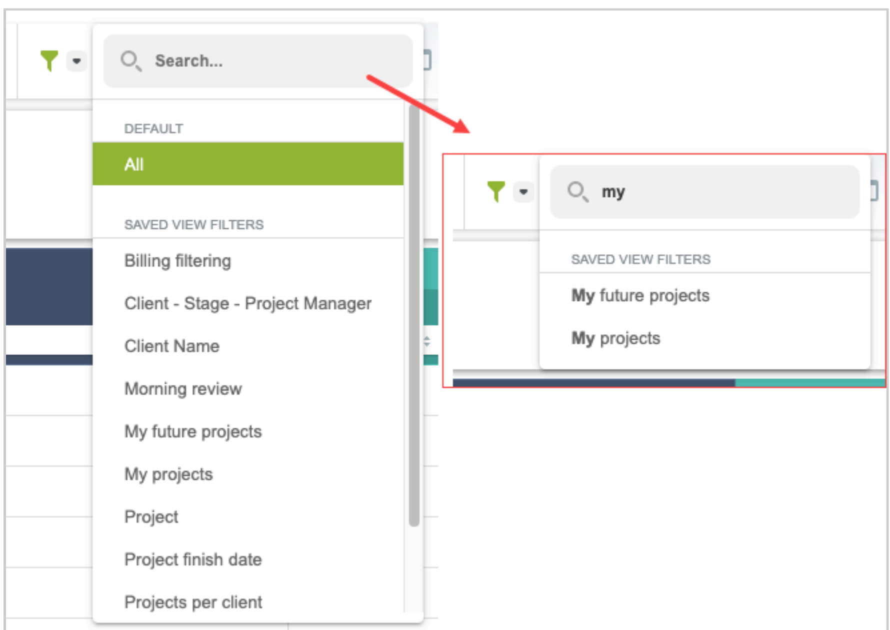
The Redesigned Advanced Filters optional feature changes the user interface for advanced filters on redesigned lists. The redesigned advanced filters panel is compact and lists filter conditions horizontally instead of vertically. It lets you select and apply saved filters directly from the list toolbar instead of the flyout panel. The new layout brings better usability and takes less of your canvas space.



1. Click the caret icon and select an option to save, save as, rename or delete the filter.
2. The filter selector in the list toolbar shows the name of the filter that is currently applied to your list, or **All** if no filters are applied.

   The filter selector includes a search bar. To search for a specific filter, type a few characters of the filter names in the search bar. The dropdown list is refined as you type to show only the saved filters with names list matching your search string.

   - The default name for new filters is "Unsaved filter".
   - A red asterisk next to the filter name indicates there are unsaved changes.
   - Click the filter name to select and apply one of your saved filter, or to clear advanced filters and show **All** data. To search for a specific filter, type a few characters of the filter names in the search bar. The dropdown list is refined as you type to show only the saved filters with names list matching your search string.



3. The logical operator is shown in light blue color background. Click the logical operator to change it. Select **Match all** if the results must match all specified filter conditions (AND logical operator) or select **Match any** if the results must meet at least one of the specified filter conditions (OR logical operator).

   > **Note:** The default logical operator for list advanced filters is **Match all**. Whenever possible, set advanced filters to match all specified filter conditions for optimum list performance.

4. Each filter condition shows the field name, the comparison operator and the value in a simple sentence structure. If multiple values are selected, the filter conditions shows a number indicating the number of values selected instead of the value.

Click a filter condition to modify it, or click the clear icon × to remove a filter condition.

> **Note:** The filter panel shows a maximum of three rows of filter conditions when you first open it. A **+ <n>** button indicates there are <n> more additional filter conditions defined for this filter. Click **+ <n>** to expand the filter panel and show all filter conditions.

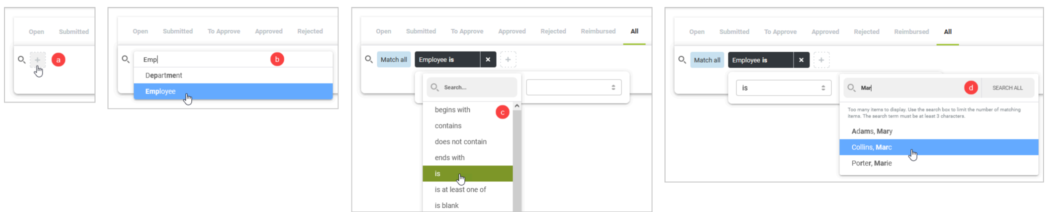
To add a new filter condition:

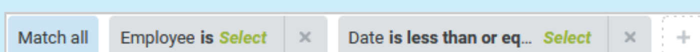
a. Click the add icon in the advanced filter panel.

b. Enter a field name. A list of matching available field names appears and is updated as you type, with exact and closest match at the top of the list. Select the relevant field.

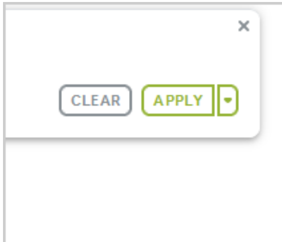
c. Select a comparison operator.

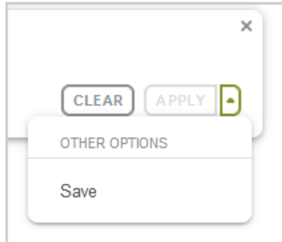
d. (Optional) Select one or more values, or a range from predefined dropdown options, or enter a custom value, depending on the field type and comparison operator.



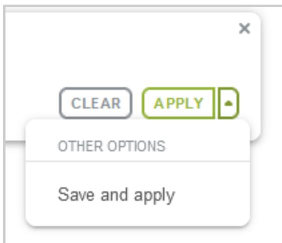
> **Note:** Review the following guidelines:
>
> - You must add at least one filter condition before you can save the filter.
> - It is not necessary to select or enter a value for each filter condition you define. The filter condition will be ignored if the value is not specified. This may be helpful if you want to configure saved filter templates, which you can then can adapt by selecting relevant values for each filter condition.
>
> 
>
>
> - The customer dropdown list in the Redesigned Advanced Filters feature shows additional customers information in addition to the customer Name, depending on your account configuration. See Administrator Guide.
> - The resource or employee dropdown list in the Redesigned Advanced Filters feature lets you search and select both active and inactive employees as values in your filter conditions depending on your account configuration. See Administrator Guide.

5. Click **Apply** to preview the advanced filter results before saving the changes you made to the filter. The list shows the items matching all filter conditions in the filter panel including any unsaved changes you made to the filter conditions. You can then click the caret next to **Apply**, and click **Save** to save the changes you made to the filter.





Alternatively, click the caret next to **Apply**, then click **Save and Apply** to save the changes you made to the filter before viewing the advanced filter results.

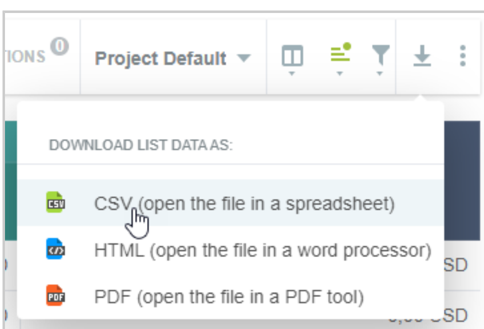


6. Click **Clear** to clear all filter conditions.

Download Your List Data

Click the Download icon in the List toolbar to download your list data. You can export your list data in one of the following file formats:

- CSV — CSV is a widely supported format for tabular data import. Use this option if you want to import the list data into a spreadsheet or a Business Intelligence (BI) tool, for example.
- HTML — Use this option to import the list data as formatted and editable text into a word processing tool, for example.
- PDF — Use this option to view the list data in a PDF tool or to distribute the list data.

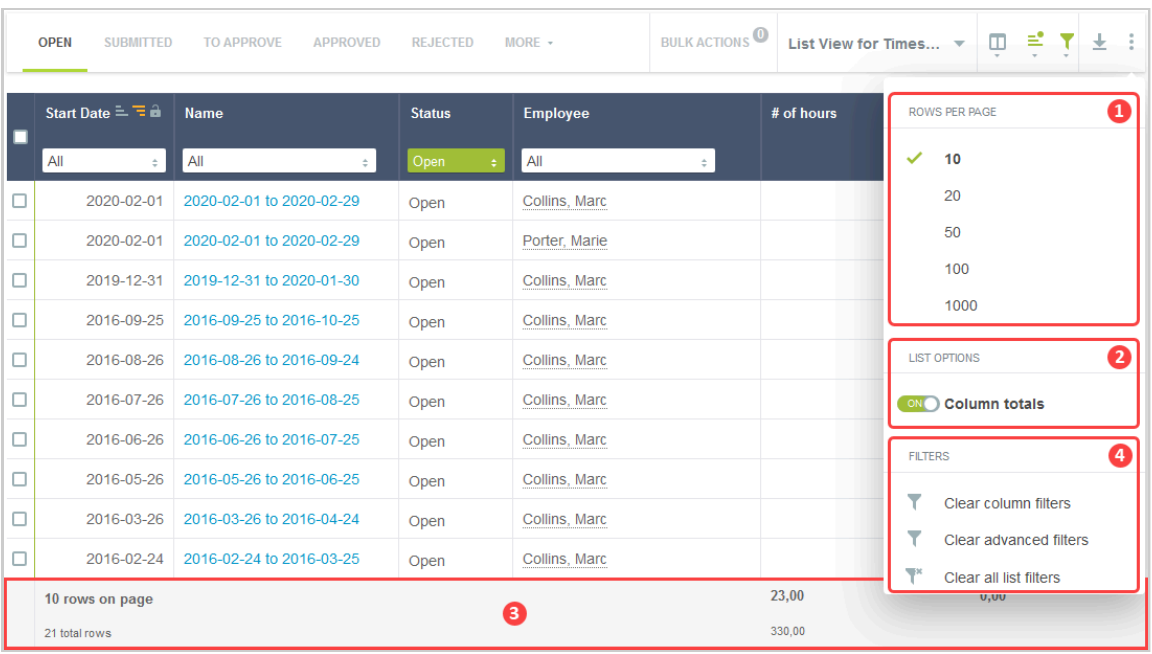


Note: The downloaded list data uses all redesigned list layout options, including multiple sorting levels.

Other List Options

Click the More options icon in the List toolbar to access the following options:

1	Set the number of **rows per page**. 1000 rows per page is the maximum allowed so as not to compromise performance when displaying large list data. If you change the number of rows per page, the list reloads at the relevant page. After you change the option, the new page contains the first row which was displayed in the old page before you changed the number of rows per page option. **Note:** If the number of rows per page is set to 100 or higher, SuiteProjects Pro renders your list data progressively as you scroll. See Rendering Rows of Data as You Scroll.
2	**Column totals** for all numeric columns, including monetary values. Click the **Column totals** toggle to turn the feature on/off.
3	When **Column totals** are enabled, the totals for the current page are displayed in bold type at the bottom of the numeric columns and the totals for the whole data across all list pages are displayed underneath the page totals. The total number of rows in the page and across all list pages are displayed at the bottom of the first non-numeric column. If multicurrency is enabled for your account and the list column contains monetary values in two or more currencies, click **Currency subtotals** to view subtotals for all currencies included in the list data. See Multicurrency Monetary Column Totals.
4	Click **Clear column filters** to reset all column filters applied to your list. Click **Clear advanced filters** to reset all advanced filters applied to your list. Click **Clear all filters** to reset all column filters and advanced filters applied to your list.



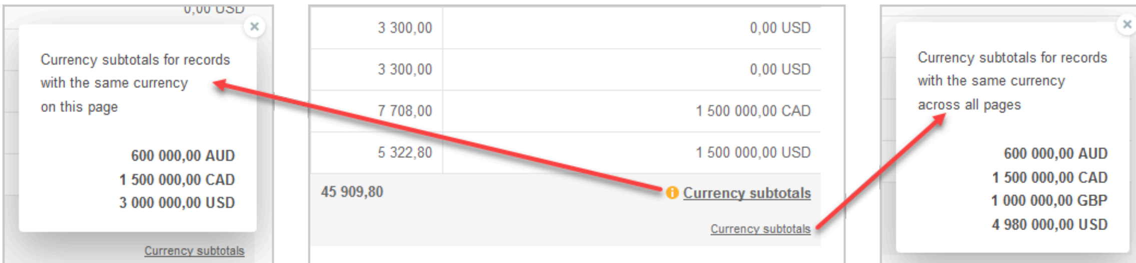
Multicurrency Monetary Column Totals

You can view monetary subtotals for each currency if multicurrency is enabled for your account and the list column contains monetary values in two or more currencies. Currency subtotals are available both for the page and for the entire list.

- To view the currency subtotals for the page you are currently viewing, click the **Currency subtotals** link in bold type at the bottom of the monetary column.

- To view the currency subtotals for the whole data across all list pages, click the **Currency subtotals** link in smaller and normal weight type underneath.

The column totals row shows the total monetary value in place of the **Currency subtotals** link if all monetary values on the current page or across all pages are in the same currency.



Personalized List Layouts

You can personalize the layout of any list that you have access to in SuiteProjects Pro and adapt the list layout to your specific needs.

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

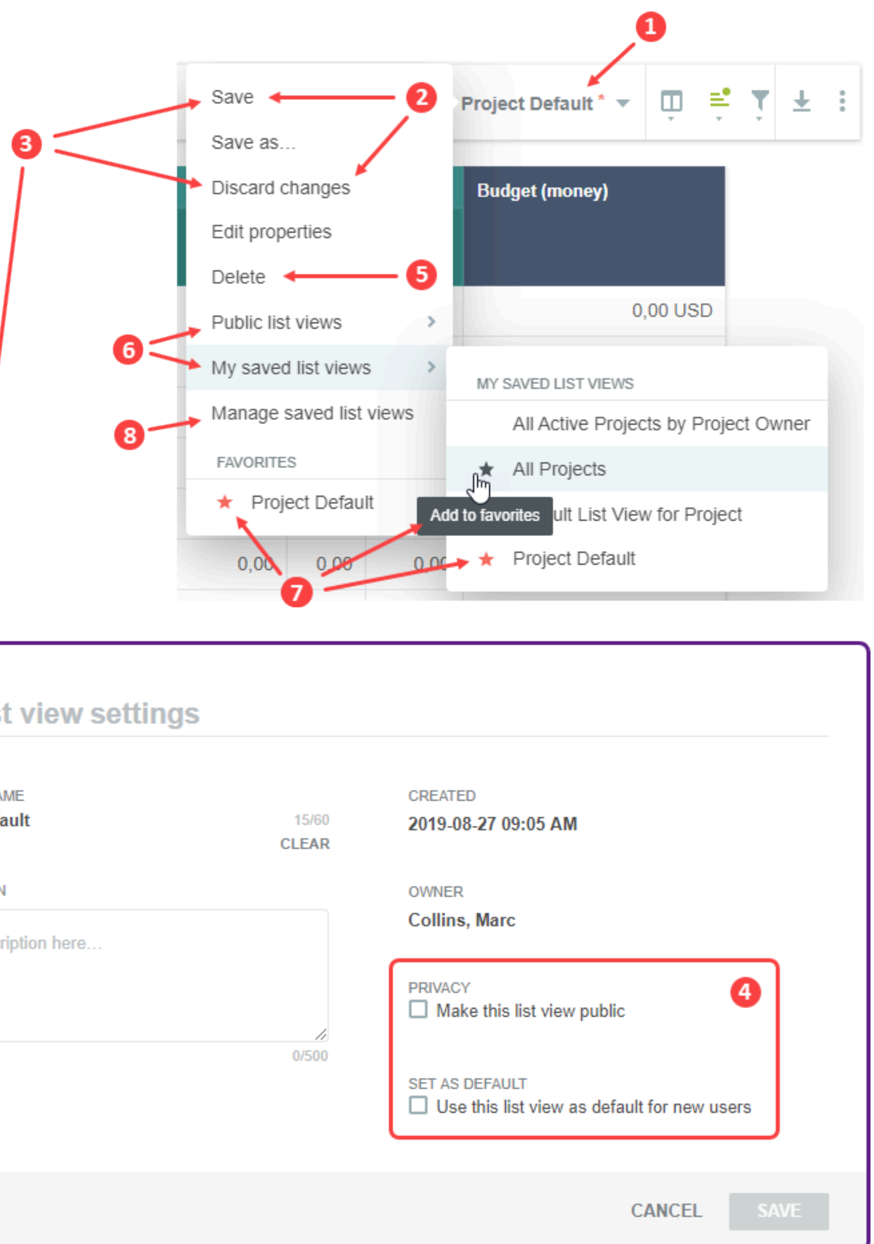
> **Note:** The following list parameters are not saved as part of the list layout:
>
> - Column lock and column totals settings.
> - Advanced filters. You can save advanced filters separately. See Advanced Filters.

The following table describes the different elements of the list layout functionality:

1	The toolbar shows the name of the layout currently applied to the list.

	The first time you go to a list, the list toolbar shows the name of the default list layout. The default list layout is either one that was set for all new users in your company, or the system default. The name of the system default layout is "Untitled". If you change any of the list layout parameters, a red asterisk * next to the list layout name indicates that there are unsaved changes to the applied list layout. Click the name of the active list layout in the toolbar or press the L key to show the list layout menu.
2	Click **Save** in the list layout menu to save the changes that you made to the applied list layout. The menu option is available if you changed any of the list layout parameters when working with the list, and only if the list is one of your list layouts. Click **Discard changes** to apply the last saved version of the list layout. When you discard changes, a confirmation dialog displays. Click **OK** to confirm. This action cannot be undone.
3	Click **Save as ...** to save the applied list layout including all changes that you made to the list layout parameters as a new list layout. When you save a new list layout, the new list view settings window appears. Enter a descriptive name for the new list layout under **List view name**, optionally enter a **Description** for your list layout (up to 500 characters), and click **Save**. The toolbar shows the new list layout name after you save it. You can edit the name and description for your list layout at any time. Click **Edit properties** to modify the layout properties. **Tip:** Be sure to save changes as a new list layout if you are using the "Untitled" system default layout or a default layout that was set up for your company and you want to retain these changes. Account administrators may set or change default layouts at any time. Unsaved changes will be lost and the new default layout will automatically apply to your list if: - You were using the system default "Untitled" layout and an account administrator set a default layout. - You were using a default layout set by an account administrator, and that layout is no longer available as a public list layout.
4	Depending on your access profile, check the **Make this view public** box when saving the list layout to give all account users access to this list layout.
5	You can delete the list layout if it is one of your list layouts. After you click **Delete**, a confirmation dialog appears. Click **OK** to confirm. This action cannot be undone.
6	Click **My saved list views** to show the list of layouts that you created for this list. Click **Public list views** to show the list of layouts created and shared by others for this list. Click the name of a list layout to apply it to the list. The last list layout you applied will automatically be applied next time you go to the list. **Important:** Save changes to the list layout that is currently applied before you apply the same or a different list layout, if you want to retain these changes. Any unsaved changes to the previously applied list layout are lost and cannot be recovered after you apply the same or a different list layout.
7	You can set the list layouts you use most frequently as favorites for easier access. When you point to one of the list layouts in **My saved list views** or **Public list views**, a star icon ★ appears next to the layout name. Click the icon to add or remove this list layout to or from your favorites. Your favorite list layouts are listed at the bottom of the list layouts menu under the **Favorites** menu section. - To apply one of your favorite list layout, click the name of that list layout.

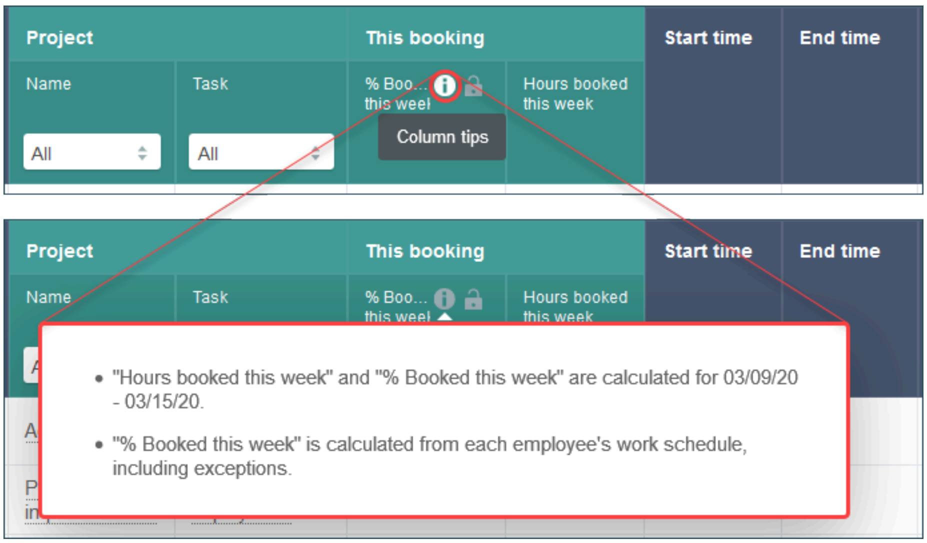
	■ To remove a list layout from your favorites, click the red star icon ★ next to their name.
8	Click **Manage saved list views** to show a show the list of all your list layouts for the list you are viewing. The Managed saved list views list lets you: ■ Apply a list layout. To do so, click the **Set as list view** link under the Actions column. ■ Delete a list layout. To do so, click the **Delete** link under the Actions column. ■ Depending on your access profile, make the list layout available or unavailable to all users of your company's account. To do so, click the **Set as public** or **Unset public** link under the Actions column. ■ Depending on your access profile, delete, set as public, unset as public multiple list layouts at the same time. To do so, check the box under the Action column for all list layouts, then select the relevant option from the **Action** dropdown list in the column header.



List Contextual Tips

Contextual tips specific to the list you are currently viewing are available at three levels:

- **List contextual tips** — Click the Tips button to display contextual tips and information related to the list you are currently viewing or to the application (module) the list is part of. See Contextual Tips.
- **Column contextual tips** — The column options in the column headers include an information icon if contextual tips are available for the column. Click the information icon to view contextual tips relevant to the column. See List Column Headers.



- **Cell contextual tips** — List cells include an information icon if contextual tips are available. Click the information icon in the top right corner of the cell to view contextual tips relevant to that field or record. See List Data.

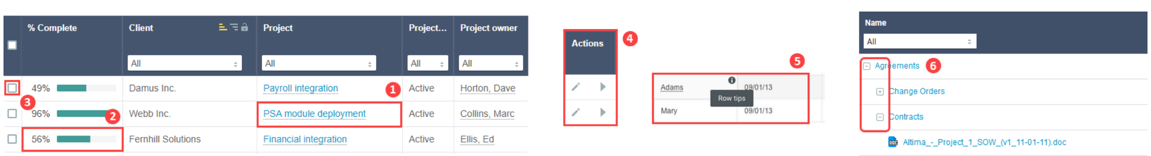
List Data

List data is presented in a tabular form according to the Column configuration, Sorting, Filtering and other List options you have specified. Lists let you have an overview of a specific set of data and let you select and go to the particular item you want to work on.

From the list you can:

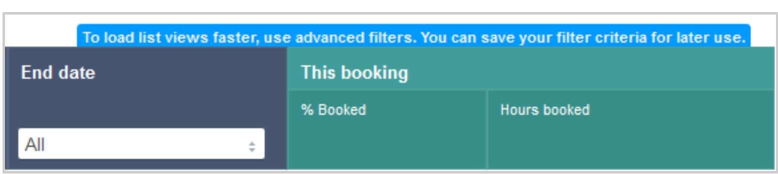
1	Go to one of the listed records — Click the name of the record to display the record page.
2	Monitor the progress of your projects at a glance.
3	Some lists include a Bulk actions column. The Bulk actions column is always the first column on the left, when present, and cannot be moved. Select records and run bulk actions on the selected records. See Bulk Actions
4	Some lists include an Actions column. The Actions column is always the first or second column on the left, when present, and cannot be moved. Depending on the list, the following actions may be available:

	■ Add New — Click the add new icon ＋ to crate a new record. ■ Delete — Click the delete icon to delete the record, document or report. ■ Download — Click the download icon to save the workspace document or the report on your computer. ■ Duplicate — Click the duplicate icon to create a copy of the record. ■ Edit — Click the edit icon to open the record form. ■ File — click the file icon to place the report in a folder or remove it from its current folder. ■ Publish — click the publish icon to publish the report to the SuiteProjects Pro Business Intelligence (BI) Connector. ■ Replace — Click the replace icon to replace a workspace document ■ Run — Click the run icon to run the report. ■ Schedule — click the schedule icon to run or publish the report automatically according to a specific schedule. ■ Share — Click the share icon to share the report with other employees. ■ View — Click the view icon to show a non-editable view of the record. ■ View Document — Click the view document icon to view a workspace document. ■ More actions — Click the more icon ⋮ to display additional action options.
5	**Cell tips** — List cells include an information icon if contextual tips are available. Click the information icon in the top right corner of the cell to view contextual tips relevant to that field or record. See List Contextual Tips.
6	Expand / Collapse — The workspace documents and saved reports lists let you expand and collapse folders by clicking the expand icon ⊞ and collapse icon ⊟ next to the folder name.

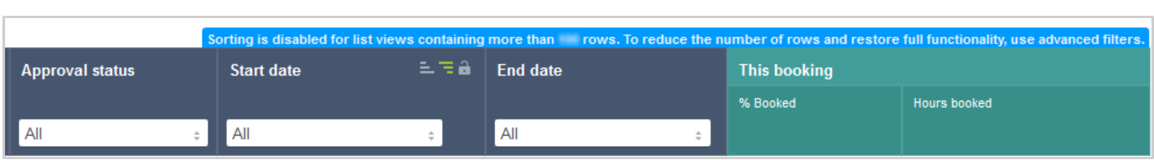


Tip: Lists with fewer rows load faster. To reduce the number of row, use advanced filters.

A tip appears at the top of the list column headers if the list contains more than 500 rows:



Some list features, such as Sorting the List Data, are disabled if the list contains more than a threshold number of rows. The threshold depends on the configuration of your company's SuiteProjects Pro account. A message appears at the top of the list column headers if the number of rows exceeds that threshold:



Tip: Reduce the number of rows using advanced filters to load lists faster or restore full functionality. See Advanced Filters.

Some of the list features depend on your account configuration:

- The following optional features change some of the list behavior and functionality:
  - Rendering Rows of Data as You Scroll
  - Display Options for Long Text Cells in Lists
- The following optional features extend the capabilities of the list data beyond an overview and navigation tool:
  - QuickViews
  - Inline-Editing in Lists
  - Project Center — See Working with the Project Center View

Note: To check whether these features are enabled in your company's account, contact your account administrators.

Rendering Rows of Data as You Scroll

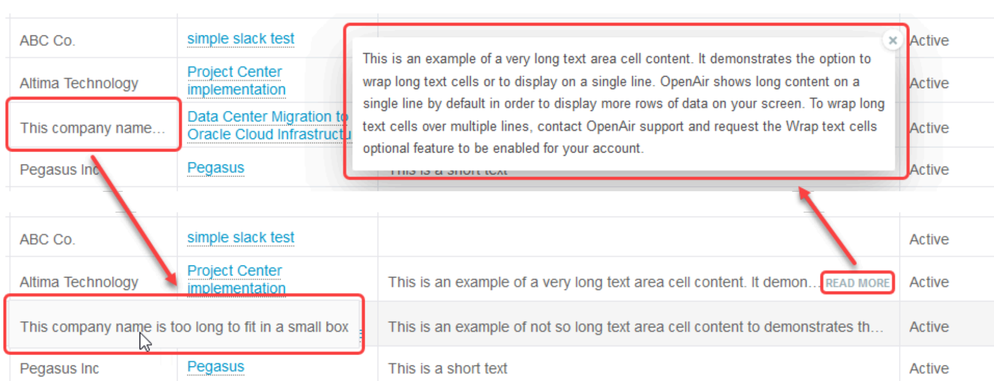
SuiteProjects Pro renders rows of data as you scroll the list if the number of rows per page is set to 100 or higher. If this is the case, SuiteProjects Pro prepares the rows that will be visible on your screen as well as extra rows of data up and down the list for display. Additional rows are rendered progressively as you scroll up and down. This reduces the demands on your browser and let your lists load faster.

Note: You can only search the rendered rows using the browser “Find in page” feature (Ctrl +F). You cannot search through all 100 or 1000 rows in a page using Ctrl + F.

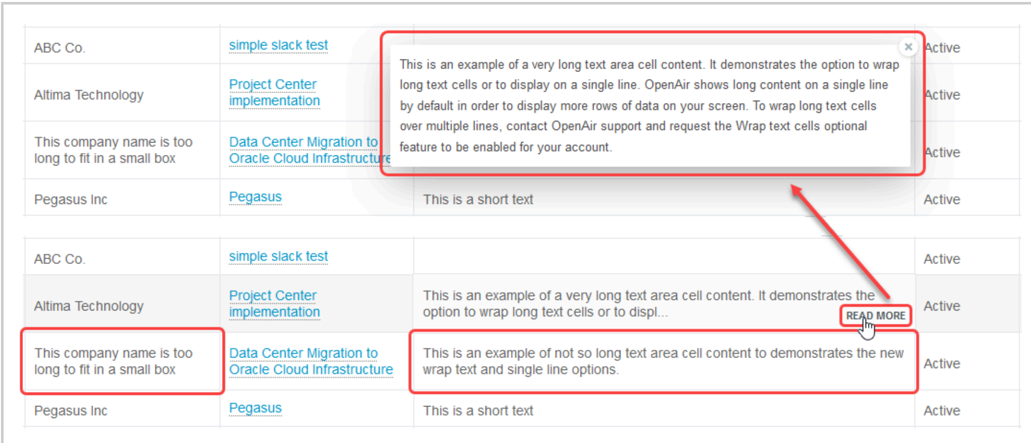
Display Options for Long Text Cells in Lists

Depending on your account configurations, lists display long text cells differently. Account administrators can select to wrap long text and text area field values on multiple lines in list cells 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).



- **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

QuickViews

QuickViews give you access to additional information, actions and quick navigation options for certain items in any lists. Quickviews are available for the following items:

- Bookings
- Employees
- Projects
- Tasks

When QuickViews are enabled for a particular item, the item is underlined with a dotted line. Point to the item to view the QuickView panel with context-specific details including:

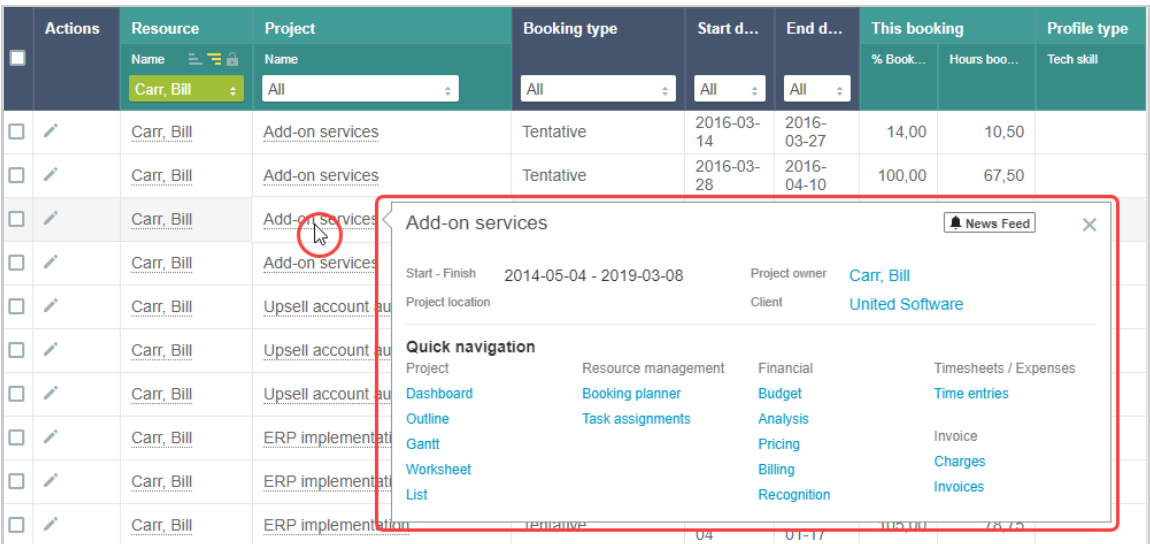
- General information about the item.
- Specific Details such as the Employee’s Skills, for example.
- Action links such as a New booking Create action or Add to Resource Comparison, for example.
- Quick navigation links to specific forms, pages and lists, filtered where appropriate to show only the relevant data.

Note: Account administrators can enable QuickViews for each item separately and set the default delay between the time you point to the item name and the time the QuickView panel appears at the account level.

- To enable QuickViews, go to Administration > Global Settings > Account > Optional Features, and check the **Enable QuickView for <record type>**.
- To set the default QuickView delay, go to Administration > Global Settings > Display > Interface: Display, and enter the **QuickView popup activation delay** in seconds under Display options.

You can change the QuickView delay or disable QuickViews. To do so, go to User Menu > Personal settings, and:

- To set the QuickView delay, enter the **QuickView popup activation delay** in seconds under Display options.
- To disable QuickViews, check the **Disable QuickViews** box under Display options.



Inline-Editing in Lists

The Inline-Editing in Lists optional feature 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

> **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

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

> **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 Getting Started with the Next-Generation Homepage.

> **Note:** Contact your account administrators to check whether the Inline-Editing in Lists feature is enabled in your company's account.

If the Inline-Editing feature is enabled and available for the list you are working with, a label on top of the column headers indicates this is an editable list.

Editable

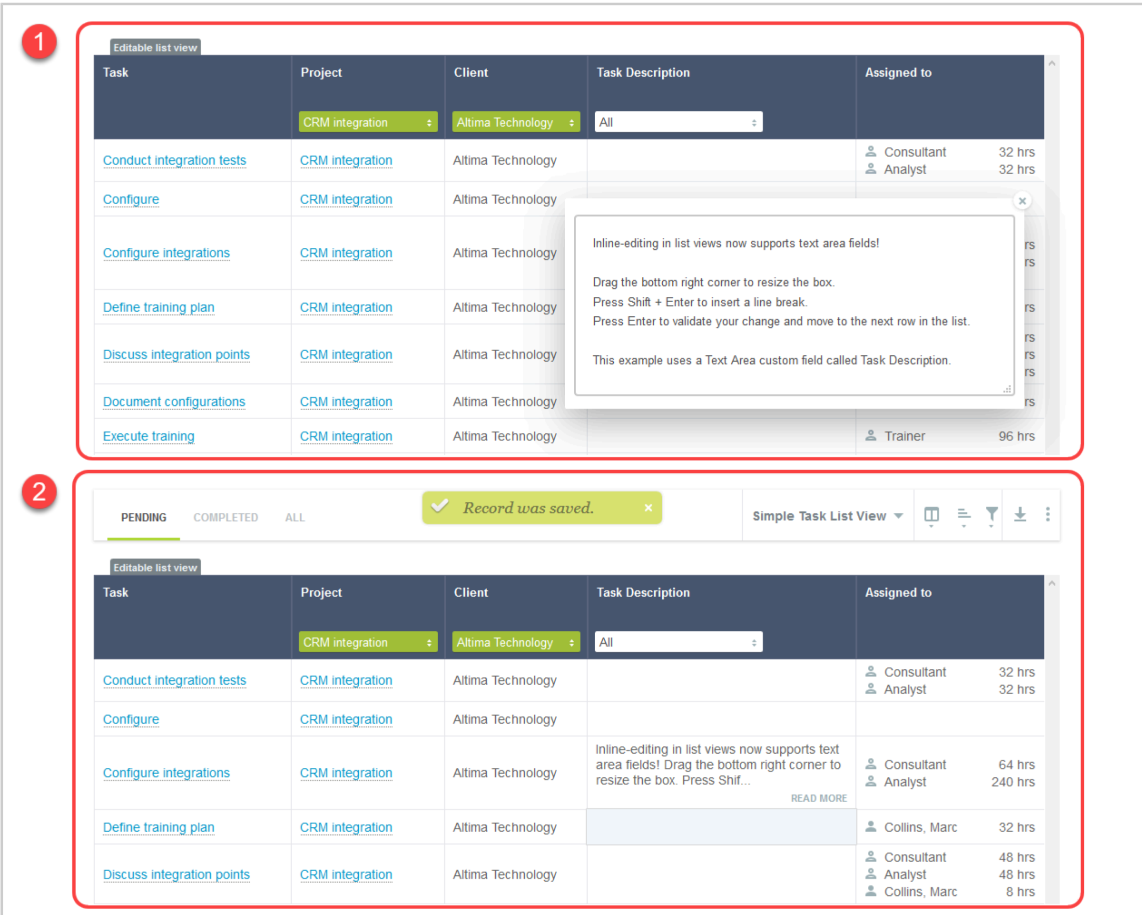
- Double-click any editable cell to edit the field value straight from the list, without having to leave the list or open a record form.

> **Note:** Inline-editing is available for all fields except File Attachment fields.
>
> Multiple selection fields are supported as of SuiteProjects Pro. See Multiple Selection Fields and Inline-Editing.

> **Tip:** Press Shift + Enter on your keyboard to insert a line break in a text area field. Drag the bottom right corner to resize the box

- Press the Tab key or Shift+Tab to go to the editable cell immediately to the right or immediately to the left, respectively. If you are editing the last editable cell to the right, press the Tab key to go to the first editable cell in the same row. If you are editing the first editable cell to the left, press Shift + Tab to go to the last editable cell in the same row.
- Click a different row to save the changes made, or press the Enter key to save the change, close the edit mode and move to the cell immediately below. An on-screen message confirms the record was saved or notifies you in case of error in the same way as when you click **Save** on the Task form.

- Form permissions and form rules are respected. If you are not able to modify a particular record or field on the record form, you will not be able to modify that record or field in the list.
- Any form scripts associated with the record form will be triggered when editing a record directly from the list.

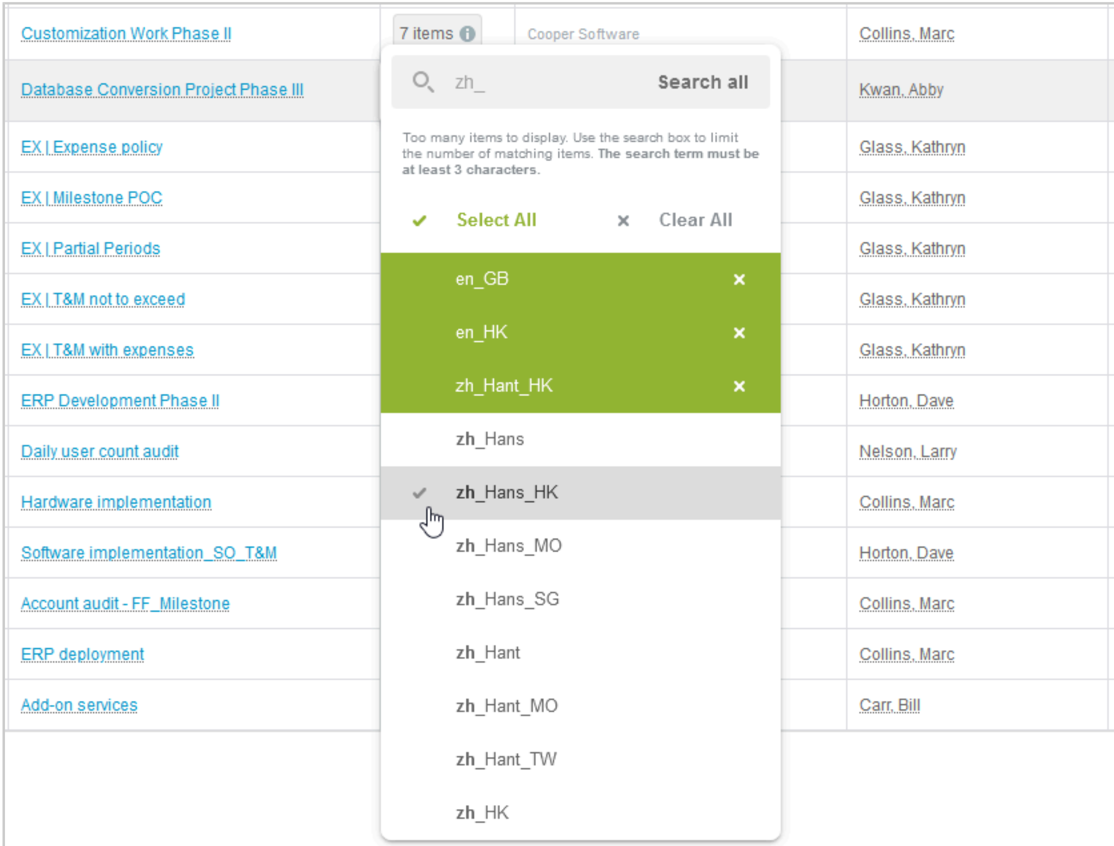


Multiple Selection Fields and Inline-Editing

When you double-click the cell to edit the field values, the list of possible values appears.

- Selected values show with a green color background at the top of the list.
- Enter a string in the search bar to show matching non-selected values at the top. If there are more value options than can be shown, enter at least three characters and click **Search all** to show matching non-selected values.
- Click a value to add or remove it from selected values.
- Click **Select all** to select all values, or **Clear all** to clear all selected values.

If only one value is selected, the list cell shows the selected values. If multiple values are selected, the cell shows the number of items and an information icon . Point to the information icon to see the values.



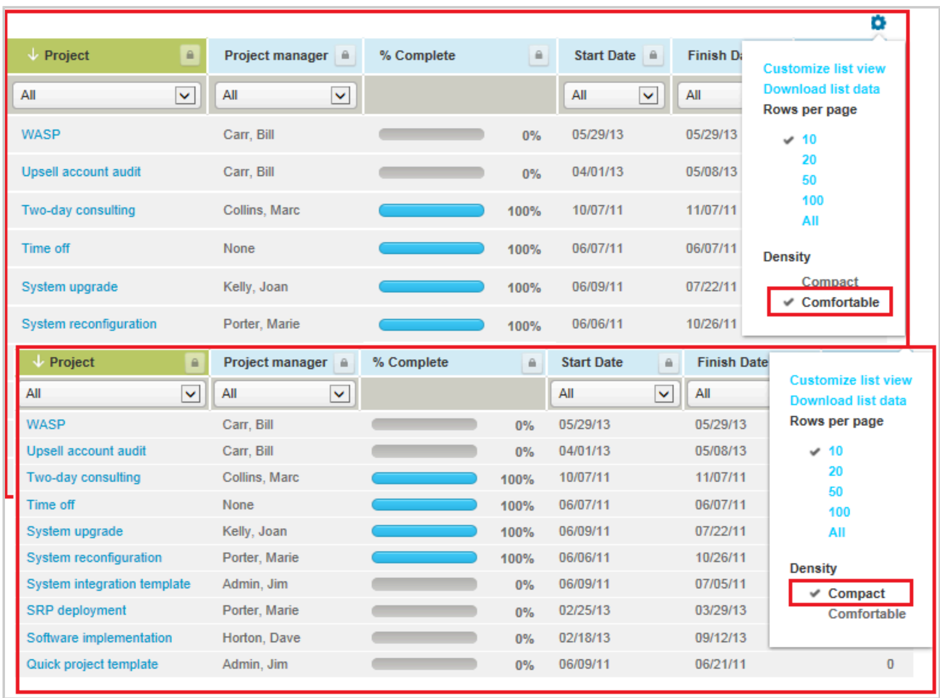
Lists — Previous UI Version Layout

> **Note:** This help topic describes how to work with lists that do not use the redesigned list view layout and functionality.
>
> For a list of lists using the redesigned list view layout and functionality, see Feature Changes in the Redesigned User Experience.
>
> For information about the redesigned layout and functionality, see Lists.

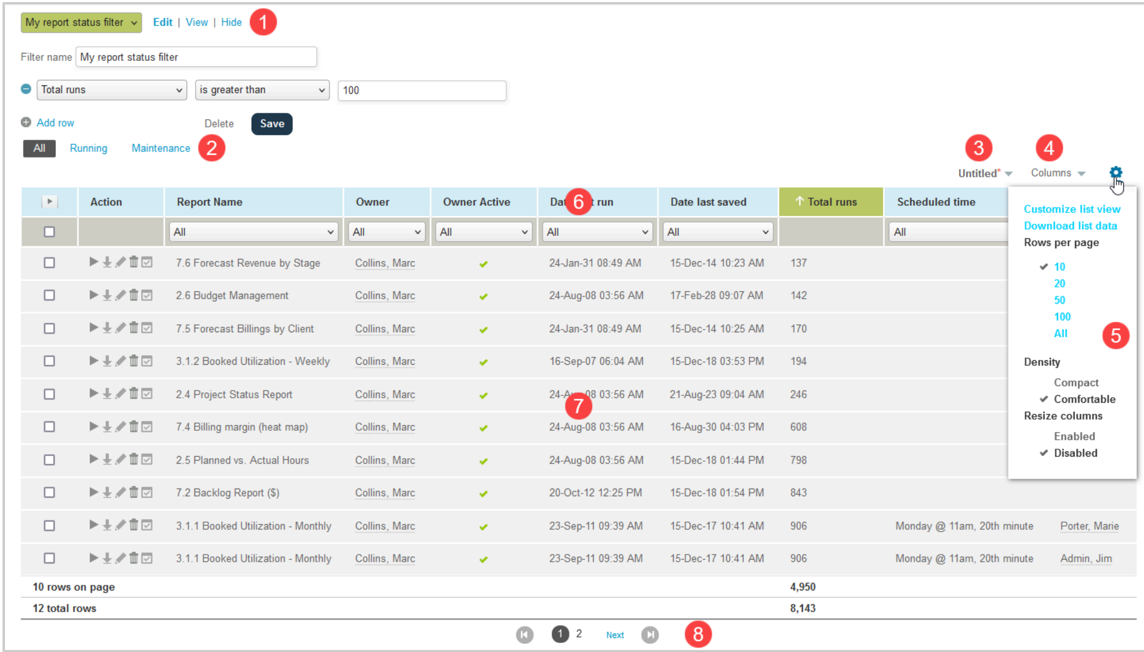
Some of the lists available in SuiteProjects Pro such as the report status list, for example, do not currently use the redesigned list view layout and functionality. This help topic provides information about lists in the previous version of the SuiteProjects Pro UI for reference.

1. Advanced filters – Select an existing filter from the dropdown list to show the filter conditions. Select **All** to show all items in the list. Select **New filter ...** to create a new filter. The advanced filter functionality is otherwise similar to the default advanced filter functionality for redesigned list views. See Default Advanced Filters UI.
2. Tab navigation – Click one of the tabs in the list toolbar to go to a different list tab or to a different view accessible from the list.
3. List layout – This functionality is similar to list layout for redesigned list views. See Personalized List Layouts.

4. Columns selection – This functionality is similar to the column selection for redesigned list views. See Selecting List Columns.
5. List settings – Click the settings icon to show the list settings menu. The menu options include:
   - Customize list view – This functionality is equivalent to the newer column selection panel. You should use the newer column selection tool that includes significant usability improvements.
   - Download list data – Click to download your list data. The download file format options are the same as for the redesigned list views. See Download Your List Data.
   - Rows per page – Select the maximum number of rows the list can show per page.
   - Density – Select comfortable or compact to control the density of the list data. In compact mode the margins are trimmed and headings wrapped to make more information visible.



   - Resize columns – When enabled, you can drag the right-side border of a column to change its width, and an additional option is available to reset column sizes.
6. Column headers – You can:
   - Click a column header to sort the list data by this column, or change the sort order. The column shows with a green color background if used for sorting the list data.
   - Use column filters under the column header to apply simple filter conditions and limit the number of rows shown in the list.
   - Click the run icon to run bulk actions on all rows that have the box checked in the same column.
7. List data – The list data supports the QuickViews functionality, lets you identify active list items at a glance with a green color check mark .
8. Page navigation — The page navigation enabled you to move through the list quickly regardless of its size. Click the First icon , Prev link, Next link, or Last icon to go to the first, previous, next or last page of list data, respectively. The page of data that is currently shown is indicated with a dark gray background, and up to 5 contiguous page numbers are shown. If the list contains more pages of data, you can point to the numbers and select a page number to jump to that page.



Records

Through records, you keep track of all the information from your company's SuiteProjects Pro account. You can have records of your employees, customers, projects, tasks, timesheets, receipts, expense reports, charges, invoices and so on. Different views and tools are available for some record types. These views may include information about records of different types which relate directly to the record you are viewing. For example, the information associated with an Expense Report record will typically comprise several Receipt records, Similarly, a Project record will include all Task and Issue records associated with that project. Other views may offer a functionality associated with that type of record.

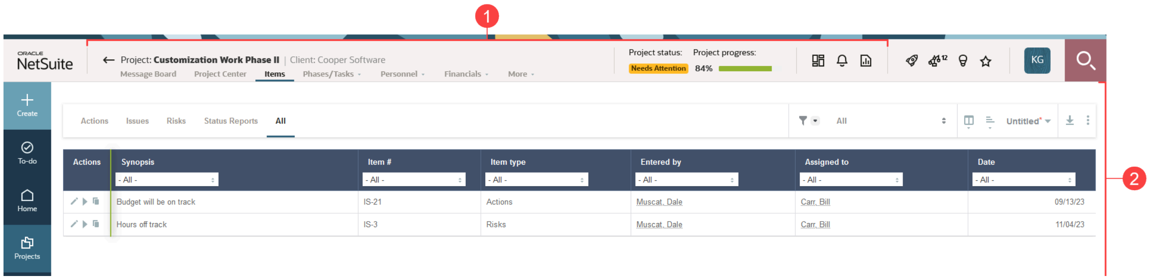
<table>
<tr><td>1</td><td>The record header gives information about the record you are currently viewing and, where applicable, lets you navigate the different views and tools available for that record type. See Record Header.

Note: Not all record types use the redesigned header layout and functionality currently. For information about record types and pages using the redesigned header layout and functionality see Feature Changes in the Redesigned User Experience.</td></tr>
<tr><td>2</td><td>The canvas shows information about the record you are viewing. Record information may be displayed in different formats depending on the type of information you are viewing. The main three formats are forms, lists and grids.

■ Entity forms let you view and modify information about the record you are viewing. See Forms.
■ In-record lists provide information about items associated with the record you are viewing and let you navigate to these item records. For more information about lists, see Lists.

Note: Not all in-record lists use the redesigned list view layout and functionality currently. For information about lists using the redesigned list view layout and functionality see Feature Changes in the Redesigned User Experience.

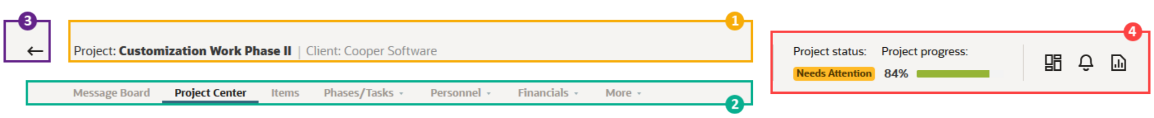
■ Grids let you view and enter information about multiple items over and across a date range on the same page. See Grids.</td></tr>
</table>



Record Header

The record header displays in the screen-specific header section of the top bar when you are viewing a record. Depending on the record you are viewing it may include the following features:

1	The **record title and sub-title** remind which record you are viewing. For example if you are viewing a Project record, the title and sub-title will be the Project name and the Customer name, respectively.
2	The **in-record navigation menu** lets you navigate between the different views and tools available for the type of record you are viewing, when applicable. See In-Record Navigation.
3	Click the back arrow ← in the top left corner to **go to the list view** for items of the same type as the record you are currently viewing. **Note:** This button does not take you back to the list you were viewing before navigating to the record. For example, if you navigated to a Project record using a quick navigation link in a QuickView within the Bookings list, clicking the back arrow will take you to the Projects list and not the Bookings list.
4	A **record information panel** gives you access to information about your record at a glance and lets navigate quickly to related assets. See Record Information Panel.



Note: The redesigned record header is currently available only for the following record types: Bookings, Customers, Envelopes/Expense reports, Guests, Invoices, Projects, Resources, Timesheets, Users/Employees. See Feature Changes in the Redesigned User Experience.

Screen headers adjust to smaller screens to ensure that title, tab navigation, record information and utility icons are either visible or accessible.

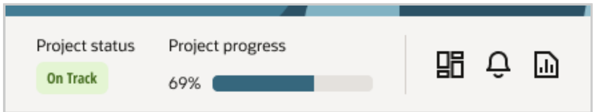
In-Record Navigation

The in-record navigation menu lets you move between the different forms, lists and tools available for the type of record you are viewing. The in-record navigation menu is fully responsive and adapts well when viewing the record on tablets or small screens. If there is not sufficient space to display all menu options in the in-record navigation panel, click **More** to display a vertical continuation menu.

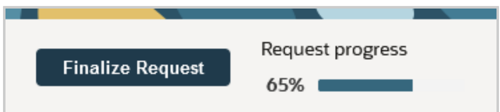
Record Information Panel

The record information panel includes more information about the record you are viewing and quick navigation links to related assets. For example:

- If you are viewing a project record, the information panel shows the project progress bar and project status and includes quick navigation links to any assets associated with the project. Such assets may include a project status summary report, a workspace, or the project status news feed. To view the asset, click the corresponding icon. You can also click the **Project status** tag to view the project status news feed.



- If you are viewing a resource request record, the information panel shows the request progress bar and the **Finalize request** button.



Forms

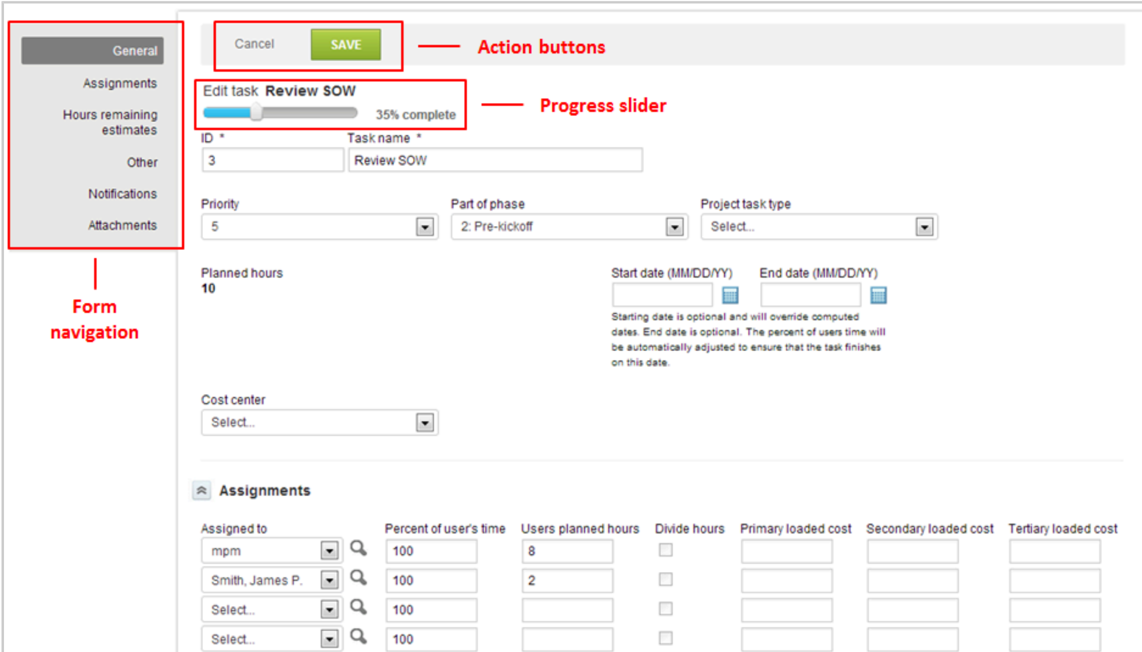
Forms let you view and modify the main information for each record.

Forms have a two-column layout, collapsible sections, and input fields.

- The form navigation panel let you move between form sections. This is particularly useful for complex records with long forms, such as Projects. The form section you are currently viewing is highlighted automatically as you scroll the form. See Form Navigation.
- Form signposting helps you keep your bearings when navigating complex forms — See Form Signposting.
- Action buttons are color-coded in the application. Green color buttons generally indicate saving changes you made. Blue color buttons perform in-page functions but do not save information. Cancel and Delete buttons are shown with a transparent background.
- Task progress bars or sliders show a visual representation of the current progress.

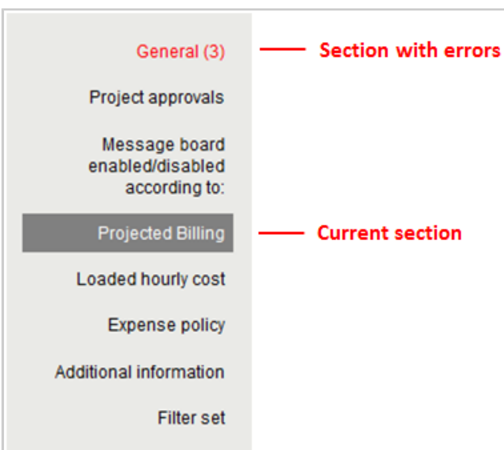
> **Note:** If enabled in your account, the slider lets you set the progress.

- On-screen error messages help you locate and correct input errors — See On-Screen Error Messages.
- In-form notifications help you find and resolve data entry issues — See In-Form Notifications.
- Either in-form overlay popups or popup windows are used for additional data entry. You should use in-form overlay popup for better usability — See In-Form Popups.



Form Navigation

Form navigation is a Forms control that allows you to move around large forms quickly.



> **Note:** Form Navigation does not display if the form only includes a General section.

Form navigation features:

- **Section list** — The bar displays the list of sections the form is divided into.

  > **Note:** Clicking on a section will take you directly to the relevant part of the form.

- **Section indicator** — The section you are currently viewing is highlighted in gray.

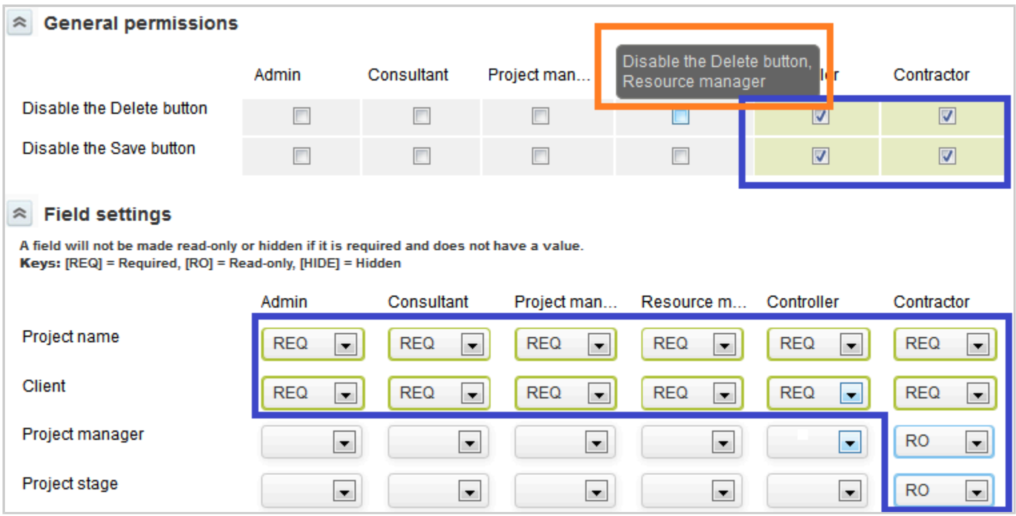
  > **Note:** As you scroll through a form the Section indicator changes instantly.

- **Section errors** — If you attempt to save an incomplete form red text is used to indicate sections with errors together with a count of the number of errors.

Note: One missing field will be reported as more than one error if it breaks more than one rule. For example, not selecting a customer can generate the 'Required field' and 'Please select a customer' errors.

Form Signposting

Form signposting uses info tips and color highlighting to help you to keep your bearings when navigating complex forms.

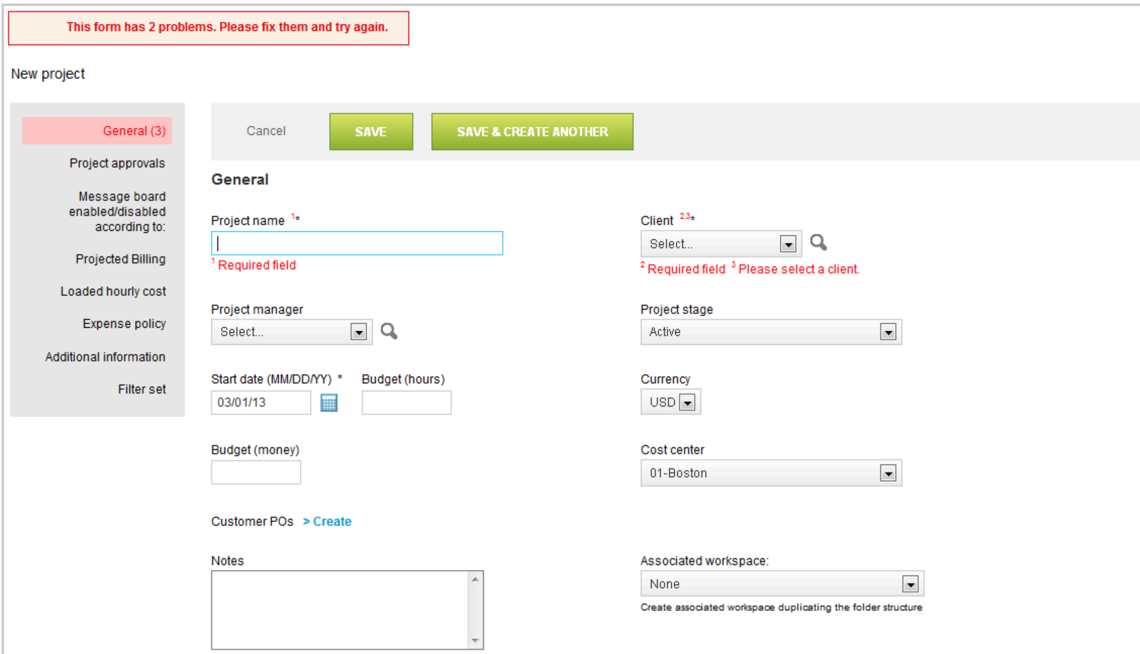


The orange box in the above screenshot shows an info tip. An info tip is displayed when you point to a control. This allows you to positively confirm the selection.

The blue boxes show the use of color to highlight the selections that have been made. This color coding makes it easier for you to verify that the correct settings have been made.

Note: For this release, form signposting has only been applied to the 'Modify the form permissions' screens.

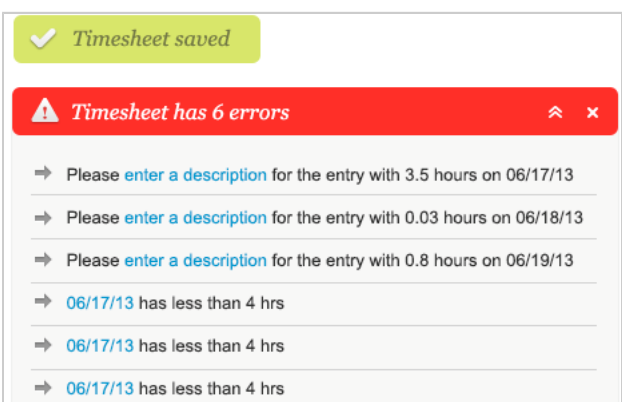
On-Screen Error Messages



The Form Navigation control and on-screen error messages help to you quickly located and correct errors messages.

If problems are encountered, the form will automatically take you to the first error. The Form Navigation control shows you the number of errors in each section. The on-screen error messages explain how to correct the errors.

In-Form Notifications



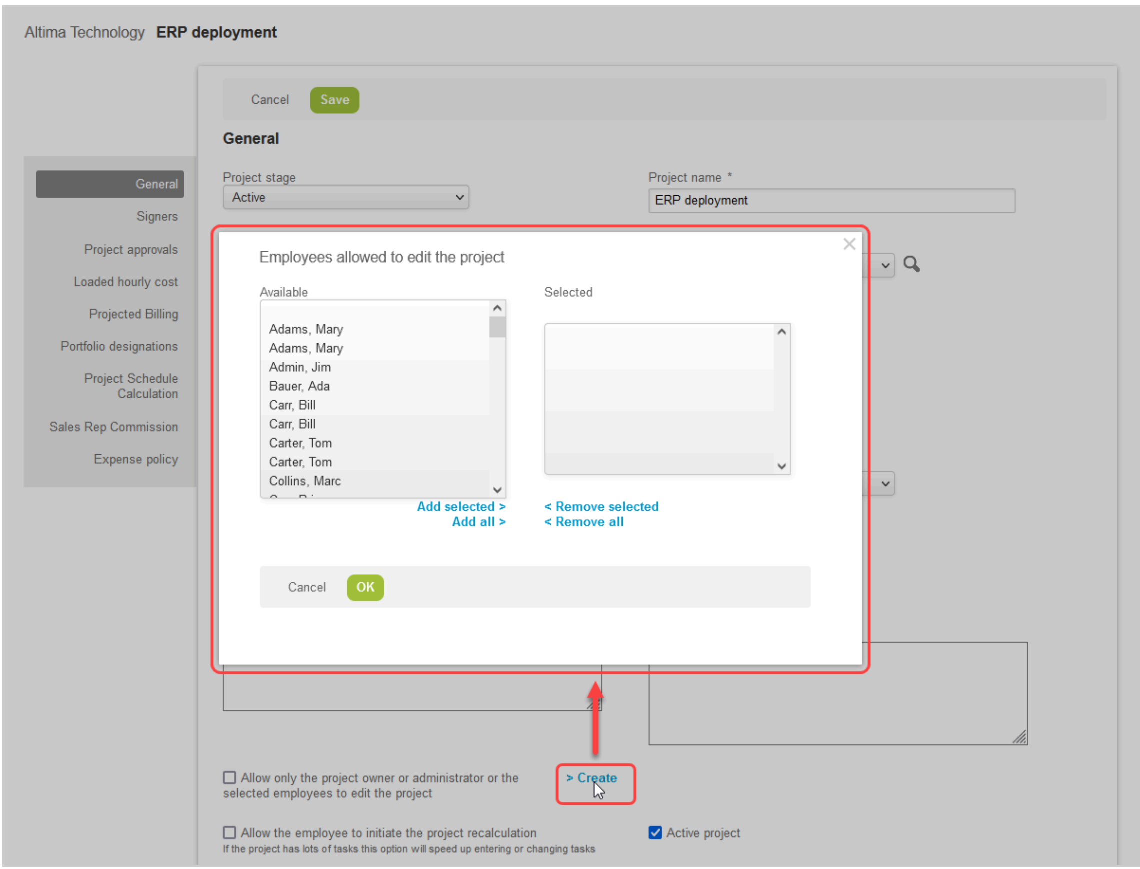
In-Form notifications provide clear feedback on user actions without the need for popup windows. They are particularly valuable for correcting data input errors. Errors are reported in a list with clickable links and instructions. Click on the links to be taken directly to the source of the error.

Note: For this release, in-form notifications are only available for the timesheet grid.

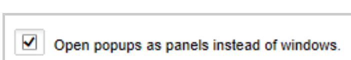
In-Form Popups

In-form popups have all the advantages of conventional popup windows, but appear as part of the form.

This allows you to block popup windows and still use all the SuiteProjects Pro functionality.

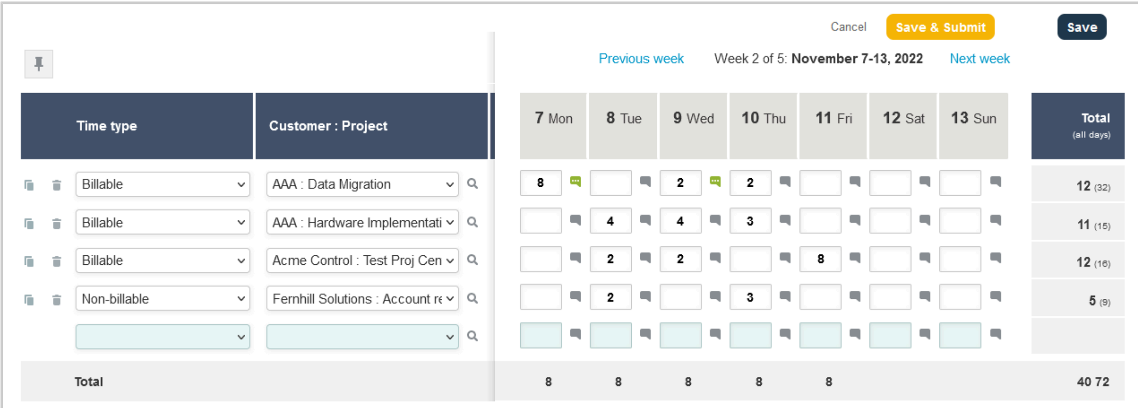


The option is enabled from **Personal Settings > Display Options**.



Grids

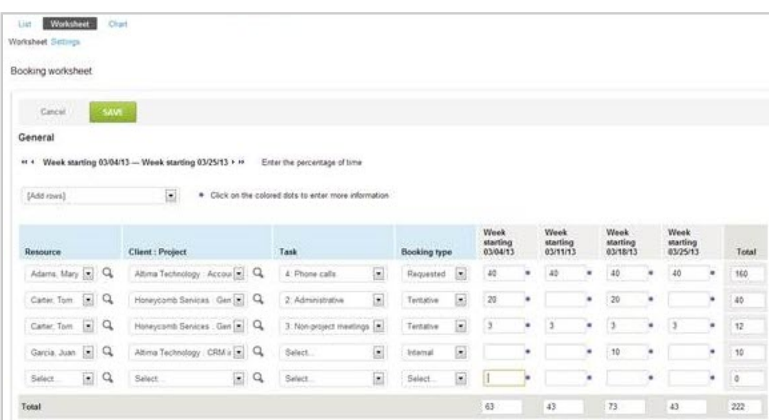
Timesheet grid



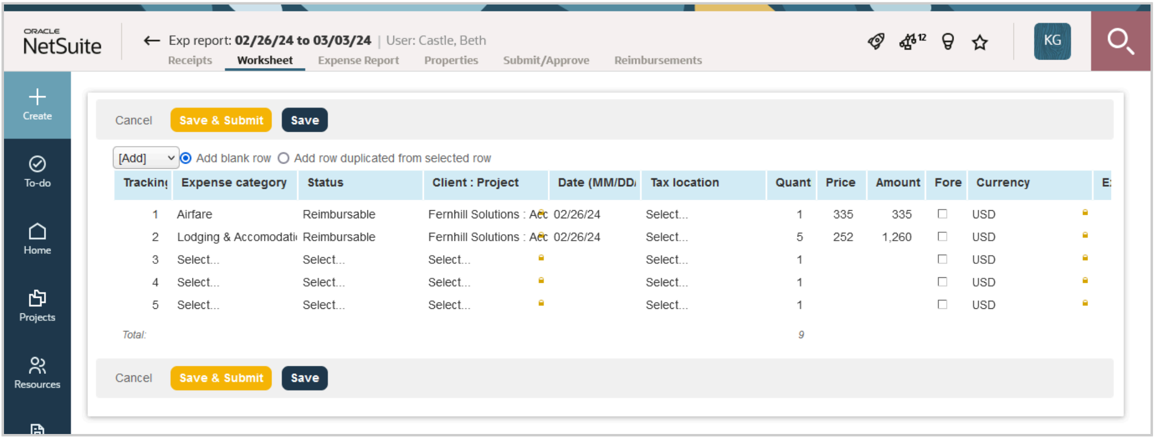
Timesheet grid features:

- **Pin** — Click the pin icon to fix the calendar display on the right. After you pin the calendar, You can scroll vertically the information columns on the left without losing the calendar on the right.
- **Week browse** — Click to view the **Previous week** or **Next week**.
- **Delete row** — Click the Delete icon and confirm the deletion to remove a row from the grid.
- **Duplicate row** — Click the Duplicate icon to add a duplicate immediately below.
- **New row** — An empty row is always available at the bottom of the timesheet. When you start to fill out the empty row, a new empty row is added automatically.
- **Time entry information** — Click the Notes icon to add information for a time entry. A green color Notes icon indicates that there is additional information for the time entry
- **Resizing timesheet columns** — When this feature is enabled, drag the column edge to resize the column. SuiteProjects Pro remembers the column size.
- **Density** — You can control the density of the timesheet grid in your personal settings. See Control the data density displayed in timesheet grid with selected mode.

Classic grid



Dynamic grid



Working with the Project Center View

> **Note:** The following optional features must be enabled to use the project center: Inline-Editing in Lists and Project Center.
>
> You must have the “View Project Center” role permission to access the project center.
>
> Contact your account administrators to check whether these features are enabled in your company's account and to check your role permissions.

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:

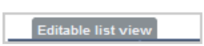
- Create and modify your project plans — See Managing Project Plans in the Project Center.
- Create and manage resource bookings from within the project center — See Managing Resource Bookings in the Project Center.
- Track hours worked in past periods and view the planned resource costs and time charges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

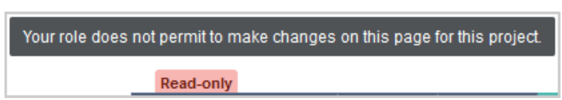
Account administrators control who can access the project center by role permission.

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 Inline-Editing in Lists.





> **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.

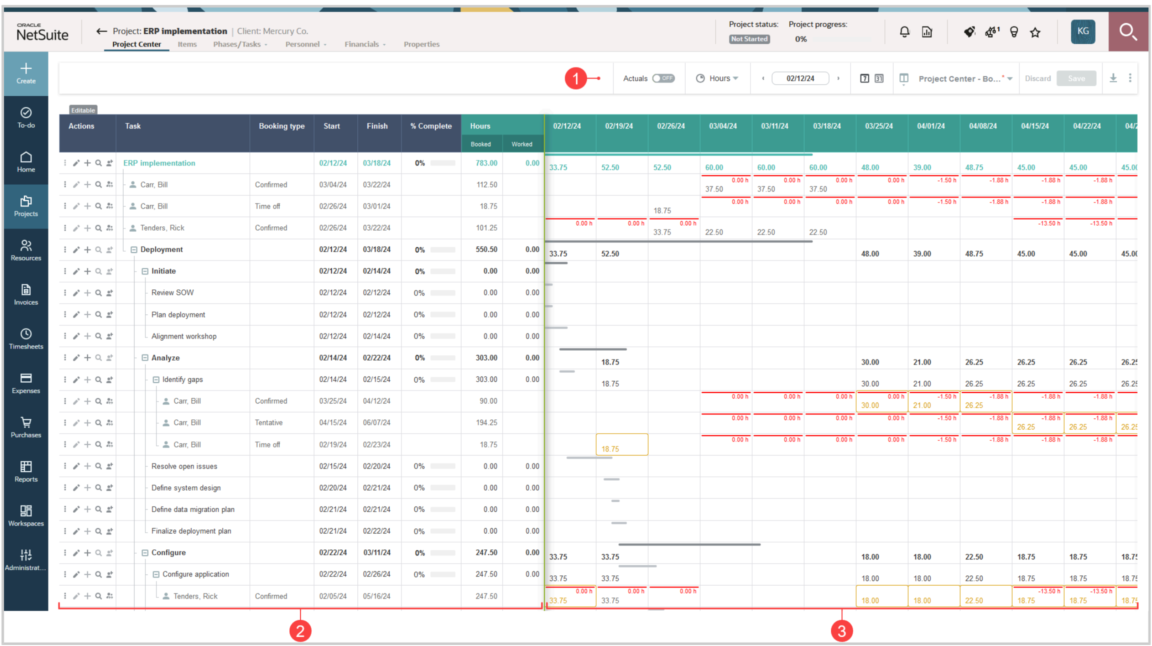
The project center includes the following components:

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 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 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 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 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 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 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.

Lazy Loading

The project center page uses lazy loading, or loading "on demand" to load only the data you see on the page as you interact with the tool.

The project outline and the booking grid are loaded progressively. SuiteProjects Pro loads only enough data to fit the available canvas space when you go to the project center. It then loads data as you scroll, as you expand or collapse nodes in your project tree, or as you change the period visible in the booking grid. This ensures a smooth experience when viewing or editing large project structures with a high number of bookings and achieves a good compromise between loading time and key project center functionality.

You can use the vertical scroll bar to go through all rows in the project center view even if the data is not loaded. This lets you scroll through the data of larger projects faster.

You can start your project where you left off with remembered vertical scrolling position, which is maintained when reloading the page or reopening a browser tab. This lets you go faster to any rows in the project center view, when working on large and complex projects.

Note: The project center initially loads only the number of rows and columns that fit in your browser window. If you increase or decrease the size of the browser window, reload the page for optimum user experience.

Project Center Toolbar

The following table describes the main components of the project center toolbar.

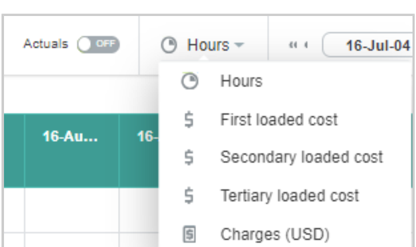
1	**Actuals** — Toggle the **Actuals** switch ON to view hours or time cost spent on the project thus far, or time charges already generated for billing. Toggle the switch OFF to view planned time, planned time cost, or time charge projections across the project lifespan. The **Actuals** switch works together with measure selector. For information about the values shown in the booking grid depending on both settings, see Viewing Hours, Time Costs, or Time Charges in the Project Center. This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.
2	**Measure selector** — Select what values are shown in the booking grid. Depending on your account configuration and role permissions, you can view hours, primary, secondary and tertiary loaded costs, and time charges. See Viewing Hours, Time Costs, or Time Charges in the Project Center.

	This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.
3	**Navigation Panel** — Control the period shown in the booking grid, use the navigation panel in the project center toolbar. See Date Navigation in the Project Center. This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.
4	**Booking Grid Granularity** — Switch between weekly and monthly granularity in the booking grid and view a week-by week or month-by-month schedule, use the date navigation panel in the project center toolbar. See Date Navigation in the Project Center. This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.
5	**Column Options**— Select the columns you want to include in the booking grid and specify the column order, use the column options in the project center toolbar. See Project Center Column Options.
6	**List layout** — Save and use list layouts in the project center view in the same way as in lists. The list layout saves the selected columns and column order in the project outline part of the page (on the left).See Personalized List Layouts.
7	**Save** and **Discard** — Hours you add or update in the booking grid are not saved automatically. You need to save or discard any changes you make in the booking grid using the buttons in the toolbar. This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.
8	**Download** — Download your list data in the project center toolbar. See Download Your List Data.
9	**List options** — Control the information displayed in the booking grid, use the list options in the project center toolbar. See Project Center Display Options.

Viewing Hours, Time Costs, or Time Charges in the Project Center

Note: This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.

Depending on your account configuration and role permissions, you can view hours, time costs based on the primary, secondary and tertiary loaded cost rates for each resource, and time charges. Select the information you want to view from the measure selector in the toolbar.

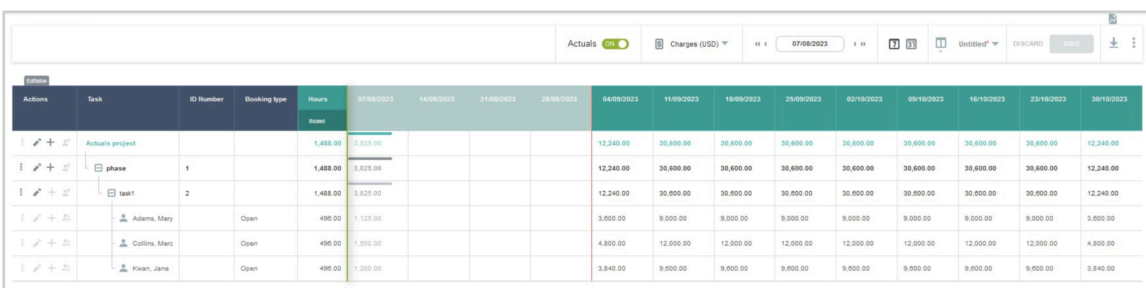


The time cost information is calculated based on current and historical loaded cost rates for each resource, including any overrides at the project or task level. If your company uses different loaded cost levels, you can view time cost information based on primary, secondary or tertiary loaded cost rates.

The following table describes the values that are shown depending on the measure selected and on the **Actuals** switch.

Measure selected	Actuals OFF	Actuals ON
Hours	Hours booked	■ For past weeks or months: **[Read-only]** Hours worked sourced from logged time entries against each task or against the project in open, submitted, approved and archived timesheets. ■ For the current and future weeks or months: Hours booked. See Hours Worked in Past Weeks or Months (Actuals).
Loaded costs (primary, secondary, or tertiary)	**[Read-only]** Hours booked × Resource loaded cost (primary, secondary, or tertiary)	**[Read-only]** ■ For past weeks or months: Hours worked × Resource loaded cost (primary, secondary, or tertiary). Hours worked are sourced from logged time entries against each task or against the project in open, submitted, approved and archived timesheets. ■ For the current and future weeks or months: Hours booked × Resource loaded cost (primary, secondary, or tertiary).
Charges	**[Read-only]** Time charge projections (based on time billing rules)	**[Read-only]** ■ For past weeks or months: Time charges ■ For the current and future weeks or months: Time charge projections (based on time billing rules)

> **Note:** Monetary values are shown in the currency set for the project. Actions for booking rows in the Actions column are not available when viewing loaded costs or charges. Only users who can view loaded cost information can view cost information in the project center.



Hours Worked in Past Weeks or Months (Actuals)

You can view hours worked in past weeks or months, and assess project performance against your plan without leaving the project center view.

You can use this functionality to compare hours logged so far against tasks, phases, or the entire project, with hours booked and adjust your plan accordingly between now and project completion.

To view hours worked or hours booked in the columns for past weeks or months, toggle the **Actuals** button in the toolbar.

- If the **Actuals** switch is **ON**, the project center shows hours worked instead of hours booked in the booking grid columns for past weeks or months:
  - Hours worked values are sourced from logged time entries against each task or against the project in open, submitted, approved and archived timesheets.
  - Hours worked values cannot be modified.
  - The column header background color and the values for past weeks or months are dimmed.
  - If a resource is not booked to a task in the project but has logged time entries against this task, the project center shows a row for the resource with hours worked. The row has a red background color and an unbooked resource icon next to the resource name.

  - Hours booked in the booking grid columns for the current and future weeks or months.
  - Calculated values for each task, for each phase, and for the entire project under the **Hours – ETC** and **Hours – EAC** in the project outline (left side of the project center view).
- If the **Actuals** switch is **OFF**, the booking grid shows hours booked for past, current, and future weeks or months.

Date Navigation in the Project Center

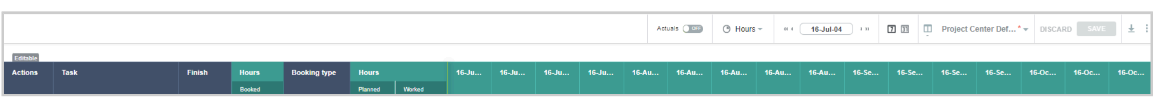
> **Note:** This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.

The Project Center view shows a booking grid alongside the project outline. Each column corresponds to a week or a month, and the column header shows the first day of the week or month, depending on the chosen granularity.

- Click the week icon or month icon to switch between weekly and monthly granularity in the booking grid. Depending on the selected granularity, the booking grid shows a week-by week or month-by-month schedule.

  Review the following guidelines:

    - When adding or changing hours in a booking grid cell, SuiteProjects Pro creates a separate booking record for this booking grid cell. In a week-by-week schedule, bookings are created for each week. In a month-by-month schedule, bookings are created for each month.
    - Switching between weekly and monthly granularity without adding or changing hours does not change the bookings.
        - Hours added in a month-by-month schedule are shown as distributed proportionally across all the full weeks and part weeks in that month when you switch to weekly granularity.
        - Hours added in a week-by-week schedule are summarized when you switch to monthly granularity. Hours for overlapping weeks (weeks overlapping across two consecutive months) are shown as distributed proportionally across both months.
    - When changing hours for a booking spanning several booking grid cells (several weeks or months), SuiteProjects Pro creates separate bookings for the cell you modified, the range of cells from the original booking immediately to the left of the cell you modified, and the range of cells from the original booking immediately to the right of the cell you modified.
    - You should use the same granularity when adding and modifying booking hours for the same project. Adding hours in one granularity and modifying these hours in the other granularity may lead to unintended decimals and cell value overrides in you project schedules.
- The number of visible 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 horizontal scroll bar to move through the project timeline. The default scroll range covers the period between the earliest booking start date and the latest booking end date across the project.
- You can use the date navigation panel in the toolbar to change the visible columns in the booking grid.
    - Click the previous icon ‹ or next icon › to move the visible period backward or forward by the number of visible columns. You can also do this when you reach either end of the scroll range to extend the scroll range and reach dates previously outside the scroll range.
    - Click the date in the center of the date navigation panel to select the starting date of the visible period. The column containing the date you select then becomes the first visible column on the left. Selecting a date outside the scroll range shifts the scroll range but does not extend it.



Project Center Column Options

You can add columns containing task and booking information in the project outline.

Click the Columns icon in the toolbar or press C on your keyboard to display the **List view columns** panel. Select the columns you want to include and specify the column order. Click **Apply** to validate your changes and return to the project center view. Your column preferences continue to apply the next time you go to the project center view until you change them or switch to a different list layout. See also Selecting List Columns and Personalized List Layouts.

Some columns contain information both for the nodes in the project structure (project, phases, tasks and milestones) and for the bookings:

- The **Start** and **Finish** columns in the project outline show the start and finish dates for the booking row. For grouped booking rows, the **Start** column shows the earliest booking start date in the group and the **Finish** column shows the latest booking finish date in the group.

- The **Hours — Booked** column shows the total hours booked for each row. For grouped booking rows, the **Hours - Booked** column shows the total hours booked across all bookings in the group. The column also shows the total hours booked for each task, phase, and for the entire project. The value is updated automatically when you save changes in the booking grid.

  > **Note:** The Show Booked Hours on Lists feature must be enabled for your account to show the total hours booked at the project level.
  >
  > There may be rounding discrepancies between the value shown in the **Hours - Booked** column and the sum of values shown in the booking grid.

- The **Hours – ETC — The Estimate to Complete (ETC)** column shows hours for each task, for each phase, and for the entire project. It is the total number of hours booked to the task, to all tasks in the phase, or to all tasks in the project and to the project, from the current week or month to the end of the project inclusive.
- The **Hours – EAC — The Estimate at Completion (EAC)** column shows hours for each task, for each phase, and for the entire project. It is the sum of the ETC and the total number of hours worked to the task, to all tasks in the phase, or to all tasks in the project and to the project, for all past weeks or months since the project start.

  > **Note:** The **Hours – ETC** and **Hours – EAC** values are calculated only when the **Actuals** switch is **ON**. See Hours Worked in Past Weeks or Months (Actuals).

- The **Notes** column in the project outline shows the notes for phases, tasks, milestones, booking. You can view or edit notes for phases, tasks, milestones, bookings and view notes for the project in the same column.

  > **Note:** Review the following guidelines:
  >
  > - Notes are read-only for projects. If the notes field in a grouped booking row are empty, there are already notes for this row or the field is empty.
  > - Changing the notes cell for a grouped booking row, overwrites the notes for every booking in the row.
  > - If the notes cell for a grouped booking row is empty then either there are different notes for different bookings in the row, or the notes field is empty for all booking in the row.

- The **Non-billable task** column is editable for task and milestones.

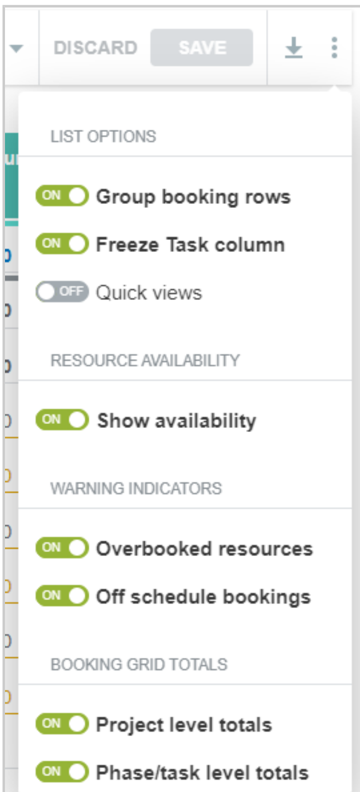
Project Center Display Options

> **Note:** All display option except QuickViews are available only if project center options are set to show resource booking information – See the help topic Project Center Options.

You can use the list options to control the information displayed in the booking grid. The following display options are available:

- Group booking rows — Show bookings for the same resource, on the same task, and with the same booking type and job code on a single row or on separate rows. See Group Booking Rows.
- Freeze Task Column — Keep the **Task** column always visible when you scroll horizontally in the project outline. See Freeze Task Column.

- QuickViews — Pause or reinstate them in the context of the project center view. See QuickViews.
- Show availability — Show or hide resource availability indicators — When shown, resource availability indicators are visible for the entire booking row when you select a cell. See Resource Availability Indicators.
- Warning Indicators — Show or hide warning indicators for off-schedule bookings (bookings before or after the task date range) and potentially overbooked resources (booked hours making up 100% or more of working hours for the resource in a given week). See Booking Warning Indicators.
- Booking grid totals — Show or hide total hours booked against each task, each phase, or the entire project. See Booking Grid Totals.

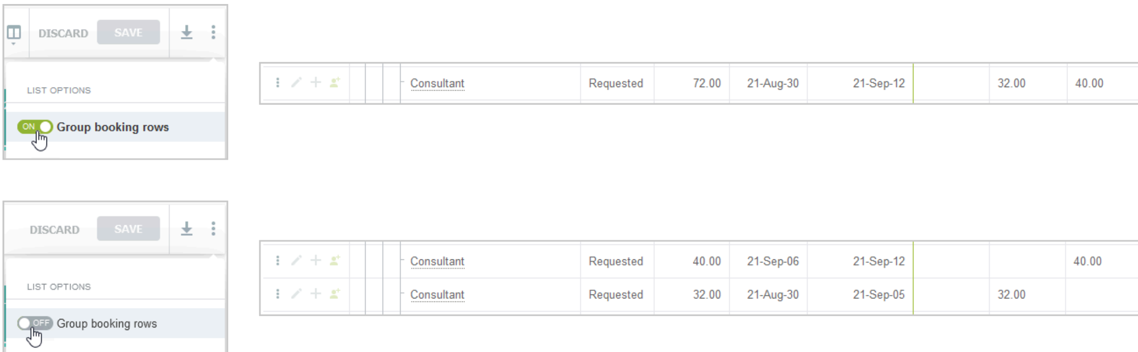


Group Booking Rows

Bookings are nested under a task or at the project level. You can choose how bookings are displayed on the project center view. To change this display option, click the More icon ⋮ in the toolbar, then toggle the **Group Booking Rows** switch under List options.

- If the **Group Booking Rows** switch is **ON**, bookings for the same resource, on the same task (or at the project level), and with the same booking type and job code, are grouped on a single row.
- If the **Group Booking Rows** switch is **OFF**, each booking appears on a different row even if all booking information is the same.

Note: When you add or edit a booking covering multiple weeks using the project center, a different booking is created for each week the resource is booked. If you create a booking outside of the project center covering multiple weeks, this booking always shows on a single line. If you modify the hours for this booking in the project center, there will be a different row for each week the resource is booked when the grouped display option is OFF.



Freeze Task Column

You can keep the Task column visible while you scroll horizontally in the project outline. This can be helpful as you the name of a phase, task, milestone and resource are visible while updating.

The **Freeze Task column** list option is enabled by default. To change this display option, click the More icon ⋮ in the toolbar, then toggle the **Freeze Task column** switch **OFF**.

QuickViews

QuickView for the record appears when you point to the name of the project, phase, task, milestone, or resource listed in the project center view. If QuickViews are enabled for your account and in your user settings, you can pause or reinstate them in the context of the project center view.

To change this display option, click the More icon ⋮ in the toolbar, then toggle the **Quick views** switch **OFF** and QuickViews are paused and do not appear.

Resource Availability Indicators

Resource availability indicators show the availability of the booked resource for each week as you make changes. This can be helpful to avoid overutilization.

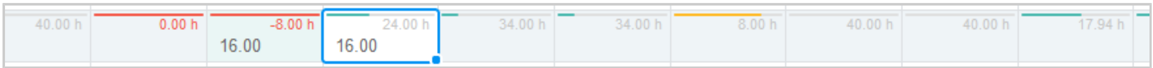
Note: Resource availability indicators show only when the booking grid shows Hours. See Viewing Hours, Time Costs, or Time Charges in the Project Center.

To change this display option, click the More icon ⋮ in the toolbar, then toggle the **Show Availability** switch under Resource availability.

If the **Show Availability** switch is **ON**:

When you click a cell in the booking grid, all cells in the booking row show a visual indication of the resource's availability that week. The availability indicator shows the number of hours available for booking and a horizontal progress bar representing the proportion of the resource's working hours that are already booked that week. It is updated automatically as you make changes.

When you edit a cell value, the cell shows the availability indicator until you save your changes. This also serves as a visual reminder of the cells you updated since you last saved changes.



- The number of hours available is calculated as the employee's working hours less the hours the employee is booked for in that week.

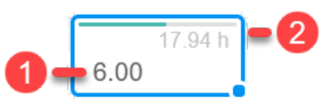
  Hours Available = Working Hours – Booked Hours, where:

  - Working Hours are based on the employee work schedule with any schedule exceptions and approved time off work deducted.
  - Booked Hours is the sum of hours across all relevant bookings for that resource and that week. Bookings included in the calculation depend on your account configuration.

    Note: Account administrators can configure which bookings are excluded from the available hours and booked hours calculation based on the **Booking type** and **Approval status**. All booking types and all approval statuses except "Rejected" are included by default. For more information, see Administrator Guide.

  Example:

  If the resource works 40 hours in the week according to the work schedule, has 16.06 hours booked to other tasks this week, the resource has 23.94 available hours. If you book the resource for 6 hours to this task this week (1), the resource now has 17.94 available hours (2).



- The progress bar is color-coded. The color code depends on your account configuration.

  Note: By default, the following color code is used:

  - Gray color — No booked hours in that week.
  - Green color — Booked hours make up less than 75% of working hours in that week.
  - Orange color — Booked hours make up between 75% (included) and 100% (excluded) of working hours in that week.
  - Red color — Booked hours make up 100% or more of working hours in that week. The available hours also appears

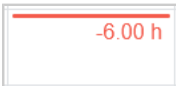
  Account administrators can customize the color code to suit the business requirements of your company by defining utilization ranges and selecting a color for each utilization range. For more information, see Administrator Guide.

Booking Warning Indicators

Booking warning indicators show potential overutilization of resources in each week and out of schedule bookings.

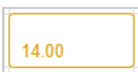
Note: Booking warning indicators show only when the booking grid shows Hours. See Viewing Hours, Time Costs, or Time Charges in the Project Center.

- Overbooked resources — Booked hours greater than or equal to a certain percentage of working hours. The resource availability indicator always shows in the cell if this percentage or more of the resource time is booked for the resource that week. The percentage of working hours (or utilization threshold) depends on your account configuration.

  Note: Account administrators can set the utilization threshold. For more information, see Administrator Guide.

- Off-schedule bookings — The cell is highlighted with an orange color outline and the hours show in orange color if the booking is before the scheduled start time or after the scheduled end date for the task or project.

You can control each type of warning indicators using the list options. To change these display options, click the More icon ⋮ in the toolbar, then toggle the **Overbooked resources** or **Off-schedule bookings** switch under Warning indicators.

Booking Grid Totals

Booking grid totals show the total number of hours booked against each task, each phase and the entire project in the booking grid to get an overview of the planned effort.

- Project level totals — The booking grid is showing the total number of hours booked against the project and against all tasks across the entire project for each week or month.
- Phase/task-level totals — The booking grid is showing the following:
  - The total number of hours booked against each task for each week or month.
  - For each phase, the total number of hours booked against all tasks across the phase for each week or month.

Note: The totals shown in the booking grid are updated immediately after you add or change booking hours in the booking grid. Click **Save** in the toolbar to update the totals shown under the **Hours Planned** and **Hours Booked** columns in the project outline (left side of the project center view).

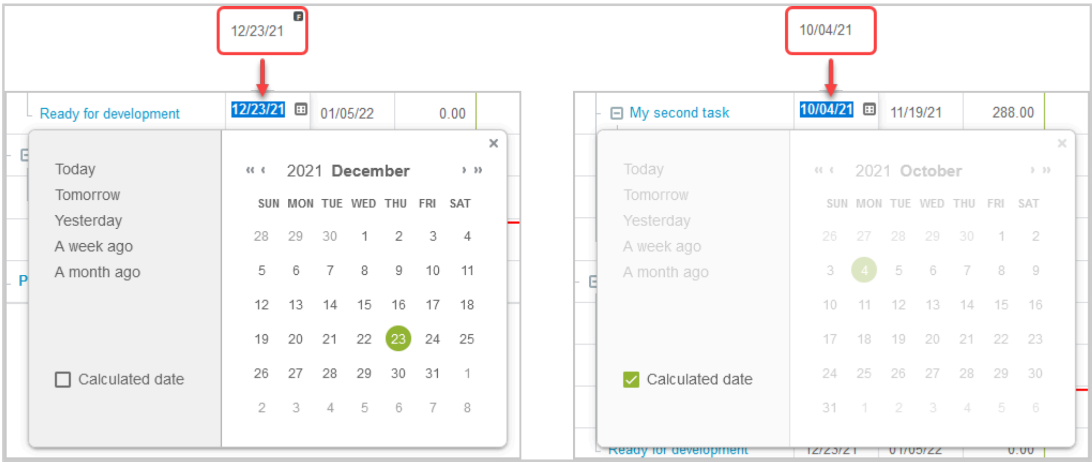
Managing Project Plans in the Project Center

You can create and modify your project plans directly in the project center.

1	Add new phases, tasks and milestones to your project plan without having to open a form. Click the Add New icon + in the Actions column next to a phase or a next to the project root to insert a new entry. The new entry will be nested immediately under the phase or the project root.
2	Use inline-editing to enter or update the phase, task or milestone information. See Inline-Editing in Lists.

You can distinguish set start and end dates from calculated dates. The fixed date icon indicates a set start and end date for a task or milestone. You can modify set start and end dates using inline editing in the project center, if your role permissions allow it, but you cannot modify calculated dates. However, you can change calculated dates to set dates and conversely.

To change a calculated start or end date to a set date, double-click the start or end date cell, clear the **Calculated date** box, then select the date. Conversely, to change a set start or end date to a calculated date, double-click the start or end date cell, then check the **Calculated date** box.



Click a different row or press Enter to save the changes. A message appears confirming the record was saved.

> **Note:** Form permissions and form rules are respected. Form scripts associated with the project phase, task or milestone form will be triggered when updating a record directly from the project center outline view.
>
> Access control at the project level is also supported. For example, if the project can only be edited by the project owner or authorized users, the project center view is read-only for all other users unless the **Allow employees with appropriate permissions to add project based items when they do not have permission to modify the project** optional feature is enabled for your account and the user can edit project tasks. A label above the column headers indicates whether the project center is editable or read-only, depending on the access control settings for the project you are viewing and your permissions.

3 To change the sequence of your project, point to the row corresponding to the phase, task or milestone you want to move, then drag it to the required position. The mouse pointer changes to a closed hand cursor when you hold the mouse down.

When you drag the selected entry:

- (**a**) Point in between the rows. Notice a green line and an arrow appear in between the rows. Notice also the direction of the arrow.
  - If you point closer to the row above, the arrow starts in the row above. Release the mouse to **insert the selected entry after the row above**.
  - If you point closer to the row below , the arrow starts in the row below. Release the mouse to **insert the selected entry before the row below**.

> **Note:** Inserting the selected entry after/before another entry is relevant when the nesting level of the two entries is different. For example, when inserting a task between a task nested under a phase and a milestone at the same level as the phase above, the inserted task will either be nested under the phase if inserted after the task above, or at the same level as the phase and the milestone if inserted before the milestone below.

- (**b**) Point to a phase row and release the mouse to **insert the selected entry into that phase**. Notice the background color of the entire row turns green as you point to a phase row.
- (**c**) Point to a task or milestone row. Notice the background color of the entire row turns gray as you point to a task or milestone row, indicating this is not a valid operation. If you release the mouse, the operation is cancelled and the sequence of your project is not changed.

4

Click the Edit icon in the Actions column to open the phase, task, or milestone property form.

Click the More icon in the Actions column and select **Delete** to delete an entry. Any entries nested under the deleted entry will move up one level. For example, if you delete one of the main phases nested under the project root, all the sub-phases, tasks and milestones that were nested under that deleted phase will now be nested under the project root. A message appears confirming the record was deleted successfully.

5

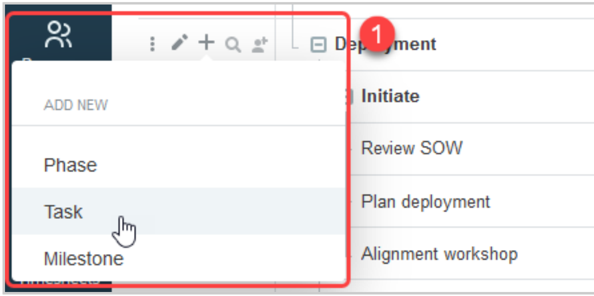
The project center lets you view and set dependencies between predecessor and successor phases or tasks.

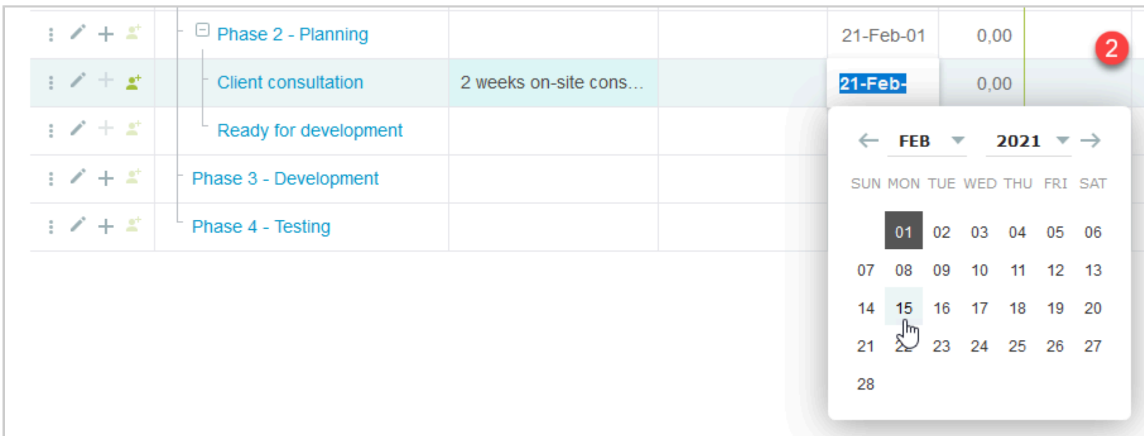
- You can add the **Predecessors** column to the project outline section of the view.
- You can set predecessor tasks or phases for any task and phase in your project sequence. The functionality is similar to setting predecessors from the task entity form or the project outline, Gantt and task detail view. You set the relationship on the successor task or phase and select multiple tasks or phases that control the start or finish date of this task or phase (predecessors).

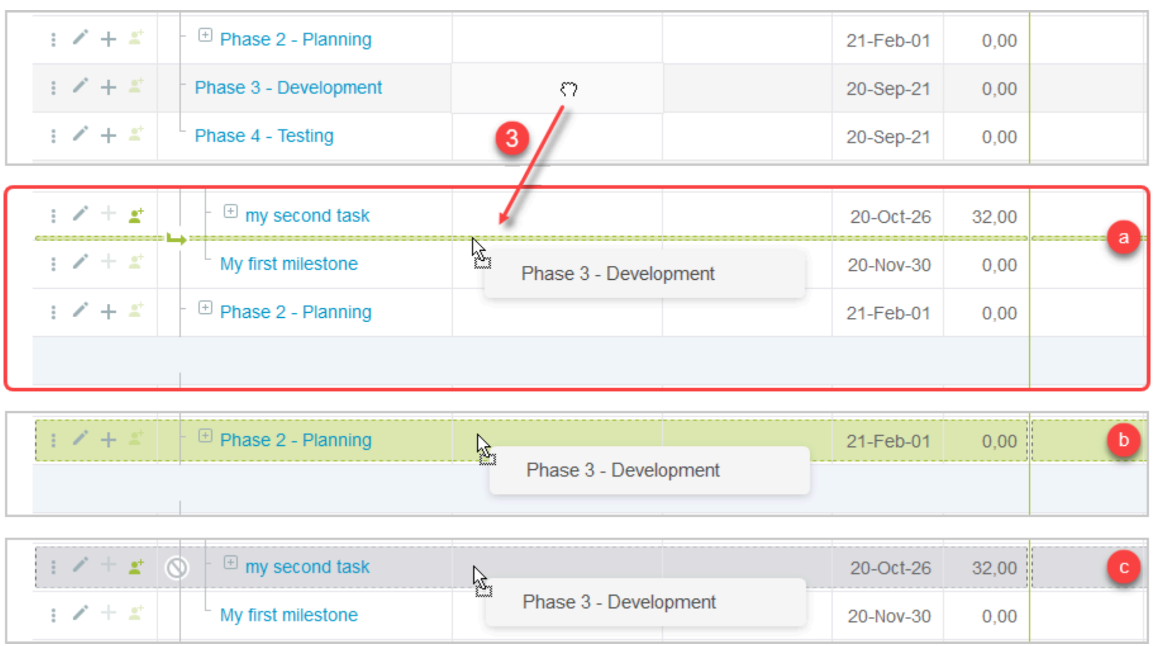
Click the More icon in the Actions column and select **Edit predecessors** or click the cell in the **Predecessors** column to edit the predecessor settings for a task. The Predecessor settings popup window appears and shows any predecessors already set and a blank line, you can use to add a task or phase dependency.

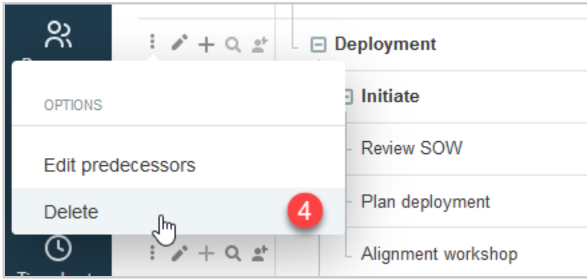
1. Select the name of the **Predecessor** task or phase. This is a task or phase that controls the start or finish date of the task or phase you a re currently editing.
2. Select the **Type** of the relationship. The following options are available.
   - Finish-to-Start — The finish date of the predecessor task or phase controls the start date of the successor task.
   - Start-to-Start — The start date of the predecessor task or phase controls the start date of the successor task.
   - Finish-to-Finish — The finish date of the predecessor task or phase controls the finish date of the successor task.
   - Start-to-Finish — The start date of the predecessor task or phase controls the finish date of the successor task.
3. Enter the number of **Lag days**. This is the number of days you want to allow between the start or finish date of the successor task and the start or finish date of the predecessor. For example, If you define a Start-to Finish with 60 Lag days, the finish date of the successor task or phase should be 60 days after the start date of the predecessor task or phase.
4. After you set the **Predecessor**, **Type**, and **Lag days**, a new blank line appears.
5. To remove a dependency, click the delete icon
6. Click **Save** to save your changes to the predecessor settings, or **Cancel** to discard your changes.

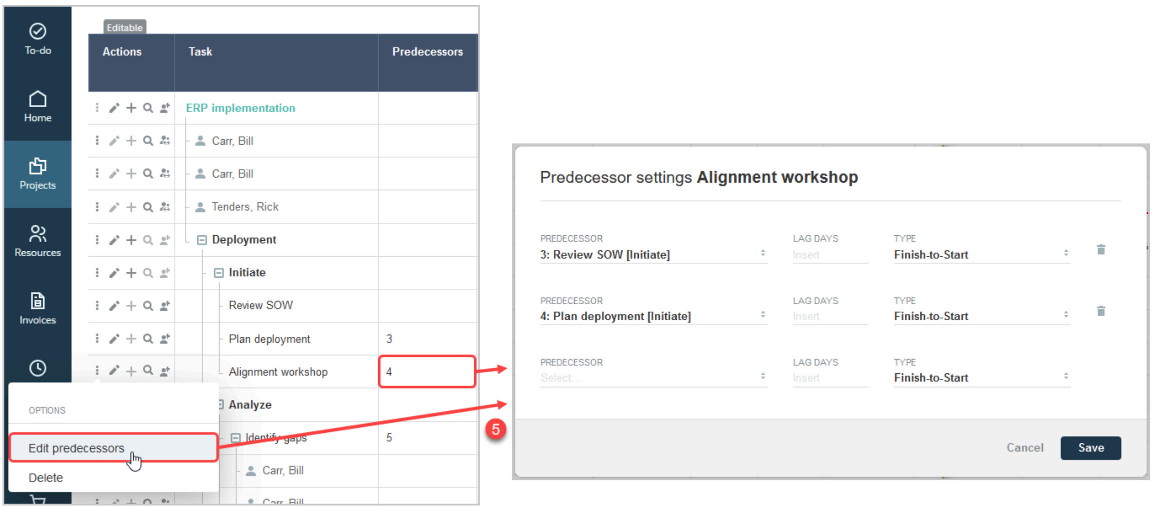
   The popup window closes and a confirmation message appears if you made any changes.


1
Deployment
Initiate
Review SOW
Plan deployment
Alignment workshop
ADD NEW
Phase
Task
Milestone


2
Phase 2 - Planning
21-Feb-01
0,00
Client consultation
2 weeks on-site cons...
21-Feb-
0,00
Ready for development
Phase 3 - Development
Phase 4 - Testing
FEB
2021
SUN MON TUE WED THU FRI SAT


Phase 2 - Planning
21-Feb-01
0,00
Phase 3 - Development
20-Sep-21
0,00
Phase 4 - Testing
20-Sep-21
0,00
3
my second task
20-Oct-26
32,00
a
My first milestone
Phase 3 - Development
20-Nov-30
0,00
Phase 2 - Planning
21-Feb-01
0,00
Phase 2 - Planning
Phase 3 - Development
21-Feb-01
0,00
b
my second task
20-Oct-26
32,00
c
Phase 3 - Development
My first milestone
20-Nov-30
0,00





Managing Resource Bookings in the Project Center

Note: This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.

You can view, create and manage resource bookings from the project center.

- For information about using the toolbar and managing columns, see Project Center Toolbar.
- For information about other display options, see Project Center Display Options.
- For information about adding bookings, see Adding Resource Bookings to Your Project Plan.
- For information about modifying bookings, see Modifying Resource Bookings in the Project Center.
- For information about adding multiple bookings and distributing hours across adjacent cells on the same booking row, see Creating a Booking and Distributing Hours Over a Multiple Week Period.
- For information about copying or cutting values from the booking grid to the clipboard and pasting values from the clipboard to the booking grid, see Copying, Cutting and Pasting Booking Row Cells.
- For information about copying values into adjacent cells, see Copying Booking Row Cells Using the Fill Handle.
- For information about copying bookings along with other project information when creating a new project from an existing project, see Copying Bookings with Projects.
- For information about deleting booing rows, see Deleting a Booking Row in the Project Center.

General Guidelines

Review the following guidelines:

- 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 does not currently support the ability to open the properties form for a booking record directly from the project center view.

> **Tip:** If the Quickviews for Projects, Tasks and Employees optional features are enabled for your account, point to the name of the project, task or employee, press Shift and click **All bookings** to view a list of all bookings for this project, task or employee in a new browser tab.

- A label above the project center column headers indicates whether the project center is editable or read-only, depending on the access control settings for the project you are viewing and your permissions. Bookings cannot be added, deleted or updated if the project center view is read-only.

> **Note:** If the project can only be edited by the project owner or authorized users, the project center view is read-only for all other users unless the **Allow employees with appropriate permissions to add project based items when they do not have permission to modify the project** optional feature is enabled for your account and the user can edit project tasks.

- Inline-editing for bookings in the project outline works the same way as for phases, tasks, and milestones.
- You can use inline-editing to edit the information shown in the project outline columns for a grouped booking row.
  - If you change any information in the grouped booking row, the information will be changed for all bookings in the group.

    If any of the grouped bookings have some unique information other than Project, Task, Customer, Employee, Job code, or Booking type, and if the relevant column is included in the project outline, the corresponding cell shows empty.
  - Form scripts associated with the booking form are triggered for each booking record in the group. This may have a performance impact on the project center, depending on the number of bookings in the group and on how resource demanding the scripts are.
  - If one of the bookings in the group is not editable, the grouped booking row is not editable.
- You can change the selected resource to another named or generic resource for all bookings in a grouped booking row using the Change Resource icon. The booked resource will be changed for all bookings in the group.
- Modifying a cell in the booking grid is equivalent to deleting the resource booking for that resource and for that week, and creating a new resource booking to replace it. Instead of updating the existing booking, SuiteProjects Pro marks the existing booking as deleted and creates a new booking with the new hours. Tale this into consideration if you use the entrance function type parameter in form scripts to differentiate between newly created bookings and updated bookings. For more information about entrance function type parameters and user scripting, see User Scripting.

Adding Resource Bookings to Your Project Plan

> **Note:** This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.
>
> You can only add resources when viewing Hours in the booking grid and when the **Actuals** switch is toggled OFF. See Viewing Hours, Time Costs, or Time Charges in the Project Center.

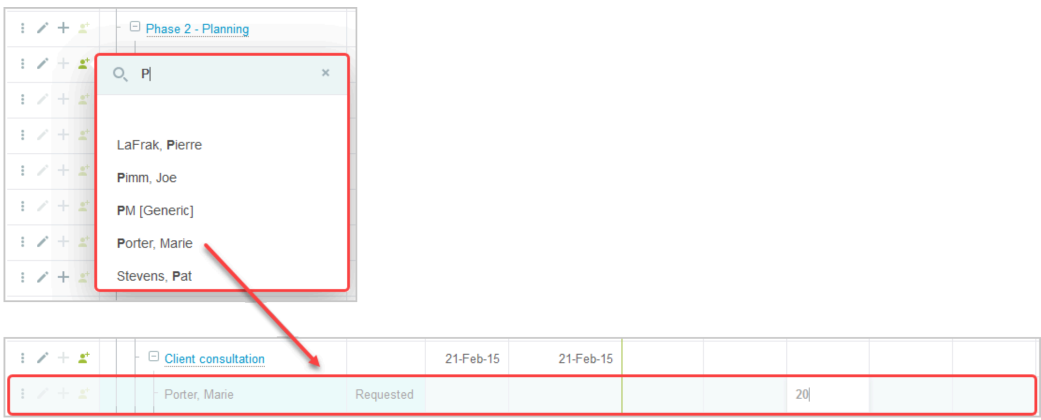
You can add resource bookings to your tasks and project without having to open a form.

To add resource bookings to your project plan:

1. In the project center view, click the Add booking icon in the Actions column next to a task or next to the project root to add a new resource booking. The new booking row will be nested immediately under the task or the project root.
2. Type a few characters in the search box to refine the list of resources, if required, and select a resource from the list of options.

   > **Note:** You can change the selected resource to another named or generic resource for all bookings in the row at any time. To do so, click the Change Resource icon and select a new resource.

3. Use inline-editing to enter information for all required fields and any additional information for your booking in the relevant project outline columns.
4. Double click the cell on the booking row corresponding to the week you want to book the resource for, and type the number of hours you want to book the resource for in that week. Repeat for each week you want to book the resource for the task.

   > **Tip:** Use Tab and Shift + Tab, or the right and left arrow keys to move to the next cell to the right or to the left of the cell you are currently editing. If the next cell is outside the horizontal scroll range, moving to that cell extends the scroll range by the number of visible columns.

   You can use the **Add multiple bookings** action to fill multiple cells on the booking row covering a continuous period. See Creating a Booking and Distributing Hours Over a Multiple Week Period.

   You can copy or cut values from the booking grid to the clipboard and paste values from the clipboard to the booking grid. See Copying, Cutting and Pasting Booking Row Cells.

   You can copy a value into adjacent cells on the same booking row by dragging the fill handle to the left or right. See Copying Booking Row Cells Using the Fill Handle.

5. Click **Save**. A message appears confirming the bookings were created successfully. Booking cells with errors preventing the save operation are outlined with a black border. Point to the outlined booking cell to show a tooltip describing the error.

   You can also click **Discard** to cancel all changes made in the booking grid after you last saved it.

General Guidelines

The following guidelines apply when adding bookings in the project center view:

- A separate booking record is created for each booking grid cell containing hours. This enables you to distribute hours flexibly over multiple weeks and to include gaps if required.

- If you want to create a booking over a specified period with hours distributed evenly across all weeks in the booking period, you can:
  - Create a single booking using the Create button. The booking will show as a single row in the project center even when the **Grouped** display option is off. If you edit any hours in the booking grid, separate booking records will be created for each week in the period.
  - Create multiple contiguous bookings in the Project Center using the **Add multiple bookings** action. See Creating a Booking and Distributing Hours Over a Multiple Week Period.
- If you add a new booking row, you must enter some hours for that booking before you can save it.
- You can add multiple booking rows before you add hours in the booking grid. However, you must add hours to all the booking rows before you can save your bookings. Note the **Save** button in the toolbar is disabled and shows in gray color if there are no hours in a booking row.
- Use inline-editing to enter additional information for your booking in the relevant project outline columns.
- You can create project templates complete with bookings then copy all bookings from your templates across to the new projects you create from these templates. Remember to choose the dates judiciously for your project and booking templates so they do not impact utilization or other reporting metrics. See Copying Bookings with Projects

Searching for Resources in the Project Center

You can use the resource search functionality to search for resources matching your profile, job code and availability criteria, and review other projects these resources are booked to directly from the project center to find the best staffing fit for your projects.

You can use the resource search to add a new resource on a project or task level and to replace a resource on a booking row.

In the project center view, locate the row for the task you want to add a resource to (or the root row for the project if you want to add a resource at the project level), or locate the booking row for which you want to replace the resource. Click the search icon 🔍 to open the resource search panel.

<table>
<tr><td>1</td><td>Title

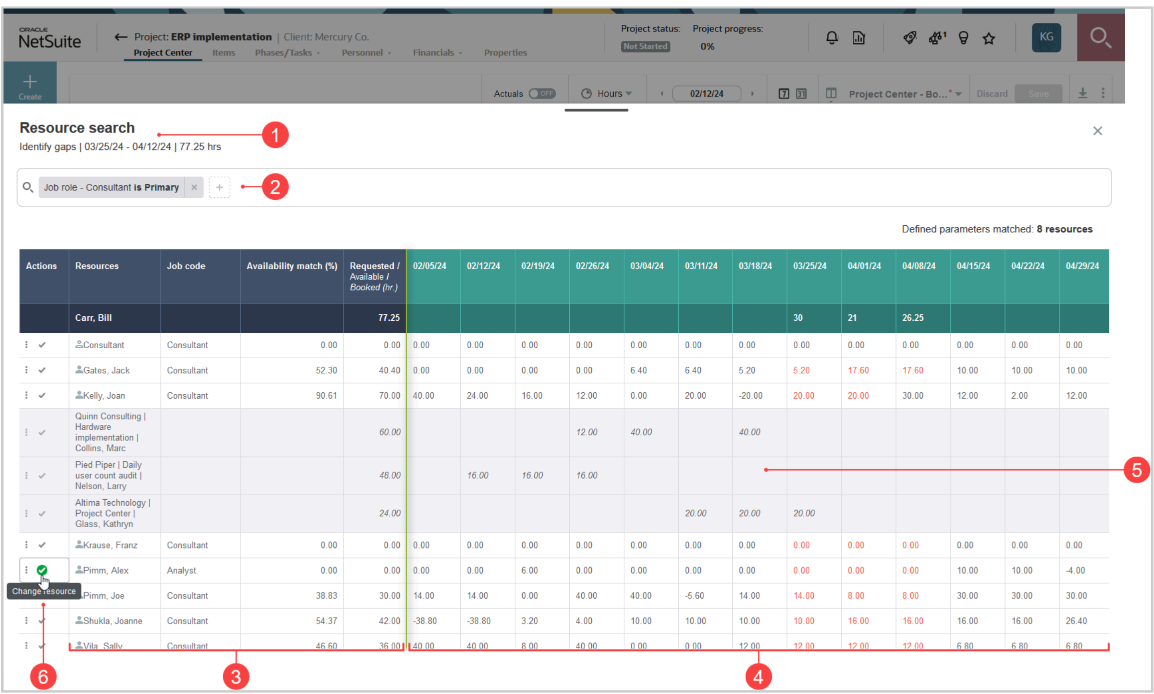
The resource search title includes:
The name of the project, task or booking.
The project, task, or booking timespan, as defined by:
The start and end dates for the project or task you are adding a resource to.
The start date of the first booking and end date of the last booking in the row, if you are replacing the resource on a booking row. In this case, the subtitle also shows the number of requested hours.
The number of requested hours (only when replacing a resource).</td></tr>
<tr><td>2</td><td>Filter conditions

Resource search results include all generic and named resources. You can add filter conditions to refine your search and show the resources matching your criteria. See Resource Search Criteria.</td></tr>
<tr><td>3</td><td>Name and summary information

The left pane lists the generic and named resources you have access to that match your search criteria in alphabetical order and their job codes.

When replacing a resource it shows the total number of hours available for each resource across the search timespan and the availability match. The first row shows the resource who is currently booked and the number of hours this resource is booked for across the booking timespan. The first row stays visible when you scroll down the list of resources matching your search.</td></tr>
</table>

4	**Resource availability grid** The grid shows the available hours for each resource in the search results. It has the same granularity (weekly or monthly) as the booking grid on the main project center page. It shows up to 100 weeks or months from the start of the project, task, or booking start and date.
5	**Other bookings** You can view other projects each resource is booked to during the search timespan. The list of other projects the resource is booked to shows on gray color background. For each project, the other bookings list shows the name and project owner and the number of hours the resource is booked across the search timespan and for each week or month in the grid. The other bookings list shows only the projects you have access to.
6	**Actions** From the Actions column, you can ■ Click the check mark to add a booking row for this resource, or change the booked resource to this resource. A check mark with a green color background shows the booking row you have added or the resource you selected to replace the currently booked resource. Click the check mark again to remove the booking row or undo the resource replacement. ■ Click the more options icon then **Show bookings** to show other projects the resource is booked to during the search timespan.



Adding booking rows using the resource search

You can add booking rows on a project or task using the advanced resource search.

To add booking rows for resources using the advanced resource search:

1. In the project center view, locate a resource next to a project or task row.
2. Click the search icon .

   The advanced resource search panel appears.

3. Start typing a few characters of the filter names in the search bar or click the add icon to add a new filter condition and show the available matching attributes.

   Enter a resource profile or skill name, **Name** or **Job code**. A list of matching available field names appears and is updated as you type, with exact and closest match at the top of the list. Select the relevant field.
4. The resource results in the name and information pane shows active generic and named resources sorted in alphabetical order. When replacing an existing resource it also shows the total number of hours available for this resource across the period.
5. Select one or multiple resources to add to your project plan. This adds a booking row for each resource you select.

   Click the check mark next to the resource to select it. Note that the icon changes to a check icon on green color background when you point to the icon and when the resource is selected.

   To clear the selection, click the green check mark. Note that the icon changes to a cross on dark gray color background when you point to the icon and when the resource is selected.
6. Click the close icon to return to the project center view.
7. Check the availability and modify the hours in the booking grid.
8. Click **Save** to save the changes or discard to cancel the changes.

Replacing a resource on a booking row using the resource search

You can replace booking rows on a resource using the advanced resource search.

To replace a resource on a booking row using the advanced resource search:

1. In the project center view, locate the resource next to a booking row.
2. Click the search icon.

   The advanced resource search panel appears. The first row in the list of matching resources shows the resource who is currently booked and the number of hours this resource is booked for across the booking timespan. The first row stays visible when you scroll down the list.
3. Start typing a few characters of the filter names in the resource search bar or click the add icon to add a new filter condition and show the available matching attributes. Enter a resource profile or skill name, **Name** or **Job code**. A list of matching available field names appears and is updated as you type, with exact and closest match at the top of the list. Select the relevant field.
4. The resource results in the name and information pane shows active generic and named resources sorted in alphabetical order and the total number of hours available for this resource across the period.
5. Click the check mark next to the resource to select it. Note that the icon changes to a check icon on green color background when you point to the icon and when the resource is selected.

   > **Note:** You can only select a single resource when you are replacing a resource.
6. Click the close icon to return to the project center view.
7. Click **Save** to save the changes.

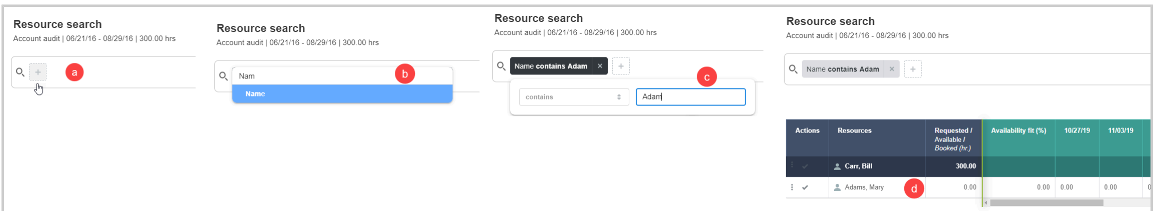
Resource Search Criteria

You can define filter conditions to find the resources that match your criteria. To add a filter condition:

1. Click the add icon + to add a new filter condition and show the available matching attributes.

2. Enter a resource profile, skill name, or field name (**Name** or **Job code**). A list of matching available field names appears and is updated as you type, with exact and closest match at the top of the list. Select the relevant field.
3. Select a comparison operator.
4. Select one or more values, or a range from predefined dropdown options, or enter a custom value, depending on the field type and comparison operator.

Each filter condition shows the operand and comparison operator in a simple sentence structure. If multiple values are selected for the second operand, the filter conditions shows a number indicating the number of values selected instead of the value. Click a filter condition to modify it, or click the clear icon to remove a filter condition.



> **Note:** By default, all users with the **View project center** role permission can use the resource search. Account administrators can restrict access to the resource search functionality for certain role using the **Hide advanced resource search in project center** role permission.

Modifying Resource Bookings in the Project Center

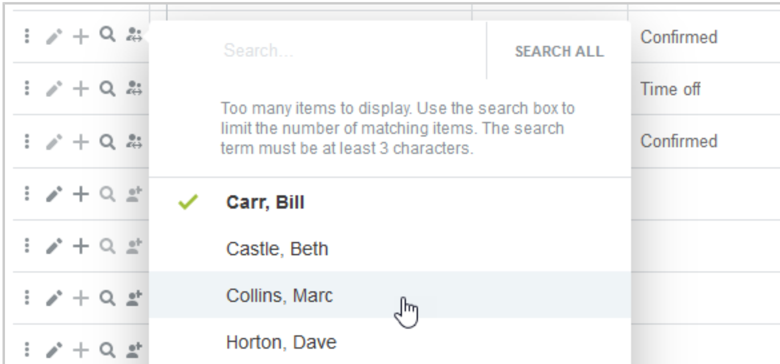
> **Note:** This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.
>
> You can modify resource bookings and resourced booked when viewing Hours in the booking grid and when the **Actuals** switch is toggled OFF.. See Viewing Hours, Time Costs, or Time Charges in the Project Center.

You can modify resource bookings using inline-editing in the booking grid and change the resource booked for all the bookings on a booking row.

> **Important:** Modifying a cell in the booking grid is equivalent to deleting the resource booking for that resource and for that week, and creating a new resource booking to replace it. Instead of updating the existing booking, SuiteProjects Pro marks the existing booking as deleted and creates a new booking with the new hours. Tale this into consideration if you use the entrance function type parameter in form scripts to differentiate between newly created bookings and updated bookings. For more information about entrance function type parameters and user scripting, see User Scripting.
>
> Review also the general guidelines for adding resource bookings — see General Guidelines.

To modify resource bookings in the project center:

1. In the project center view, locate the booking row with bookings you want to change.
2. To change the resource for all the bookings on a booking row, click the Change Resource icon, then select a named resource or a generic resource from the dropdown list. You can use the search bar to refine the dropdown list as you type.



You can distinguish between a named resource or a generic resource with different icons. A solid resource icon indicates a named resource, an outline resource icon indicates a generic resource.

3. Double click the booking row cell you want to modify, and type the number of hours you want to book the resource for in that week. Repeat for each cell you want to modify.

   Tip: Use Tab and Shift + Tab, or the right and left arrow keys to move to the next cell to the right or to the left of the cell you are currently editing.

   You can use the **Add multiple bookings** action to fill multiple cells on the booking row covering a continuous period. See Creating a Booking and Distributing Hours Over a Multiple Week Period.

   You can copy or cut values from the booking grid to the clipboard and paste values from the clipboard to the booking grid. See Copying, Cutting and Pasting Booking Row Cells.

   You can copy a range of cells to adjacent cells horizontally or vertically. See Copying Booking Row Cells Using the Fill Handle.

4. Click **Save**. A message appears confirming the bookings were created successfully. Booking cells with errors preventing the save operation are outlined with a black border. Point to the outlined booking cell to show a tooltip describing the error.

   You can also click **Discard** to cancel all changes made in the booking grid after you last saved it.

Note: Modifying resource bookings is possible only when the booking grid measure shows Hours and the Actuals switch is OFF. See, Hours Worked in Past Weeks or Months (Actuals) and Viewing Hours, Time Costs, or Time Charges in the Project Center.

Creating a Booking and Distributing Hours Over a Multiple Week Period

Note: This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.

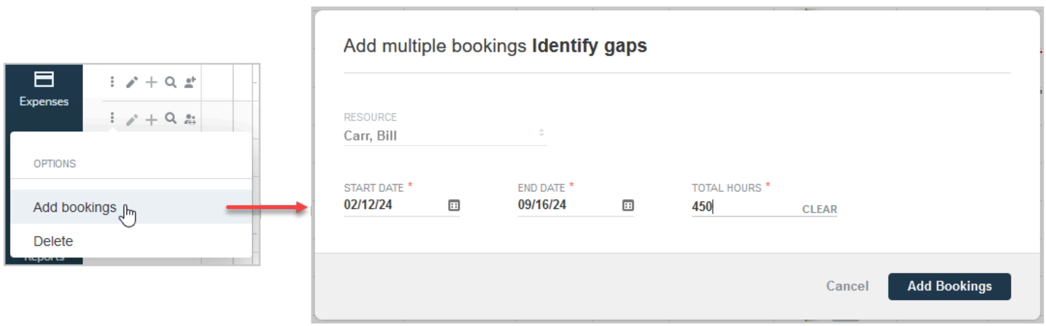
Adding multiple bookings is possible only when viewing Hours in the booking grid and when the **Actuals** switch is toggled OFF. See Viewing Hours, Time Costs, or Time Charges in the Project Center.

To create a booking over a specified period with hours distributed evenly across all weeks in the booking period, you can do one of the following:

- Create a single booking using the Create button. The booking will show as a single row in the project center even when the **Grouped** display option is off. If you edit any hours in the booking grid, separate booking records will be created for each week in the period.
- Create multiple contiguous bookings in the Project Center using the **Add multiple bookings** action. You can use the following steps to fill multiple cells on the booking row covering a continuous period. This is equivalent to creating a booking using the **Create** button above the main navigation menu, except, in the project center it will create multiple contiguous bookings — one for each complete or part week — with the total number of hours distributed evenly over all weeks in the specified date range.

To create a booking and distribute hours over a multiple week period:

1. Add a resource booking row. See Adding Resource Bookings to Your Project Plan.
2. Click the More icon ⋮ in the Actions column, then click **Add multiple bookings**. The Add multiple bookings dialog appears.



3. Select a **start date** for the booking period. The start date defaults to the first day of the first week shown in the booking grid.
4. Select an **end date** for the booking period. The period between the start date and end date must not be more than 52 weeks.
5. Enter the **total hours** to be booked over the entire period.
6. Click **Add bookings**. The booking grid shows the total number of hours distributed evenly over all weeks in the specified date range. The number of hours for each week is calculated in function of the number of days available in that week (if the end date falls part through the week, for example). This operation overrides any existing hours for weeks falling in the specified date range.

21-Sep-06	21-Sep-13	21-Sep-20	21-Sep-27	21-Oct-04	21-Oct-11	21-Oct-18
	13,24	22,06	22,06	22,06	22,06	22,06

Note: Adding multiple bookings is possible only when the booking grid measure shows Hours and the Actuals switch is OFF. See, Hours Worked in Past Weeks or Months (Actuals) and Viewing Hours, Time Costs, or Time Charges in the Project Center.

Copying, Cutting and Pasting Booking Row Cells

Note: This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.

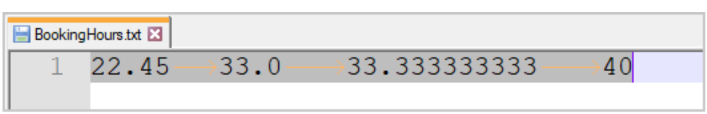
Copy or cut values from the project center booking grid (booked hours) to the clipboard and paste values from the clipboard to the booking grid.

- To copy cells to the clipboard, drag to select a range of adjacent cells and press Ctrl+C (Windows) or Cmd+C (macOS).
- To cut cells (copy to the clipboard and delete values when values are pasted), drag to select a range of adjacent cells and press Ctrl+X (Windows) or Cmd+X (macOS).
- To delete multiple cell values at the same time, drag to select a range of adjacent cells and press Delete.
- To paste the clipboard content into the booking grid, select the first cell of the destination range and press Ctrl+V (Windows) or Cmd+V (macOS).
- To clear the clipboard content after you copy or cut cells, press Esc. The cut values are not deleted until you paste them.

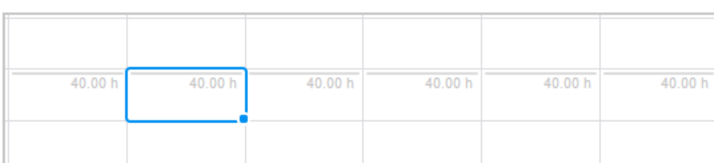
Note: You can also use keyboard keys to select a range of adjacent cells. To do so, select a cell, then use Shift + Arrow keys to extend the selection range both horizontally and vertically.

You can include cells outside the horizontal scroll range in your selection. Dragging or pressing Shift + Arrow keys beyond the last column in the scroll range extends the scroll range.

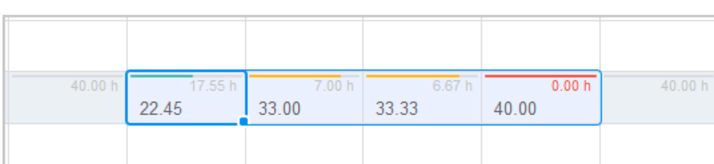
The selected area is highlighted with a light blue color background and outlined with a thin blue solid line. When you cut or copy the selected area, the outline changes to a dotted line. When you paste the clipboard content, the destination range is highlighted with a light blue color background and outlined with a thin blue solid line.



1 Ctrl+C



2 Ctrl+V



3

Review the following guidelines:

- You can copy, cut and paste values across multiple adjacent rows and columns.
- You can only select adjacent booking rows for the same task, or select adjacent booking rows at the project level. It is not possible to copy, cut or paste booking rows across multiple tasks at the same time.
- When pasting into the booking grid:
  - You can paste up to 100 columns at the same time, even if the clipboard data contains more columns than the number of columns displayed on the project center page.
  - You can only paste into adjacent booking rows for the same task, or paste into adjacent booking rows at the project level. If the clipboard data contains more rows than the number of available booking rows, only the first rows of clipboard data are pasted into available booking rows, additional rows of data in the clipboard are ignored.
  - The selected cell or range indicates the top left corner of the destination range. If you select a range of cells smaller than the clipboard content, the clipboard content is copied into a destination range of up to 100 columns across and up to the number of available booking rows down. If you select a range of cells larger than the clipboard content and the clipboard content contains more than one value, the destination range is the same size as the clipboard content up to 100 columns across.
  - If the clipboard content contains only one value, the value is pasted into all cells in the selected destination range.
  - All existing values in the destination range are overwritten. If the source cell was empty, the destination cell is cleared.
  - You can paste numerical values copied from any application, including tab-separated numerical values copied from a text file.
  - The source values must be in the correct numerical format, either an integer or a decimal number with a dot for decimal separator — `26.75`, for example. Pasting a cell value formatted as text or as a number with a comma for decimal separator or thousands separator, for example, clears the destination range. This is independent on the number format in your personal settings.
- Changes in the booking grid are not saved automatically. To save the changes, click **Save**. To discard the changes, click **Discard**.

Copying Booking Row Cells Using the Fill Handle

> **Note:** This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.

You can copy a single value or multiple values into adjacent cells vertically or horizontally in the project center booking grid by dragging the fill handle to the left or right.

To copy booking row cell values to adjacent cells:

1. Drag to select the cell or the range of cells you want to copy (source range).

   > **Note:** You can also use keyboard keys to select a range of adjacent cells. To do so, select a cell, then use Shift + Arrow Keys to extend the selection range both horizontally and vertically.
   >
   > You can include cells outside the horizontal scroll range in your selection. Dragging or pressing Shift + Arrow keys beyond the last column in the scroll range extends the horizontal scroll range.

2. Point to the fill handle on the bottom right corner of the selected range.

   The cursor becomes a + sign.

3. Drag the fill handle to the right, to the left, above, or below across the range of cells you want to fill (destination range).

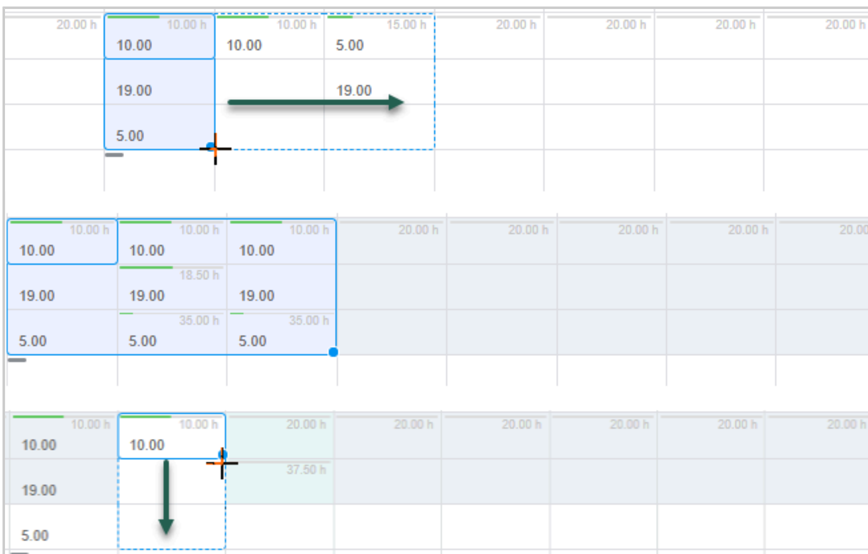
   The destination range is outlined with a blue dotted line.

   > **Note:** You can include cells outside the horizontal scroll range in the destination range. Dragging the fill handle beyond the last column in the scroll range extends the horizontal scroll range.

4. Release the mouse.

   The destination range is filled automatically with the values of the copied cells. Any existing values in the destination range are overwritten. If the destination range is larger than the source range, the source range values are repeated as a pattern to fill the entire destination range.

   > **Note:** Changes in the booking grid are not saved automatically. To save the changes, click **Save**. To discard the changes, click **Discard**.



Copying Bookings with Projects

You can create project templates complete with bookings then copy all bookings from your templates across to the new projects you create from these templates.

The start date of each booking associated with the new project is relative to the project start date and determined based on the start date of the booking associated with the project template relative to the project start date in the template. This feature, in combination with the booking-driven project schedule calculation can save you time staffing your new projects in the project center view.

For more information about booking-driven project schedule calculation, see Basing Project Schedule Calculation on Bookings for a Project.

> **Note:** Choose the dates judiciously for your project and booking templates so they do not impact utilization or other reporting metrics.

To copy bookings when creating a new project from another project:

1. Click the Create button, then **Projects: Project, from another project …**.

The New Project form appears.

2. Enter or select all required information.
3. Select a project from the **Duplicate phases and tasks from this project** dropdown list.
4. Check the **Duplicate bookings** box.
5. Enter or select any additional information as required.
6. Click **Save**.

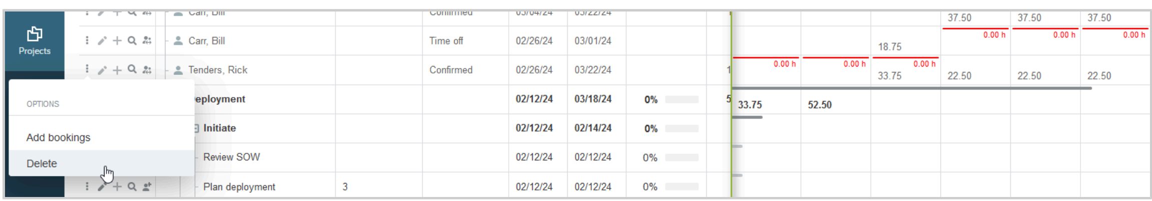
Deleting a Booking Row in the Project Center

> **Note:** This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.
>
> You can delete booking rows when viewing Hours in the booking grid and when the **Actuals** switch is toggled OFF. See Viewing Hours, Time Costs, or Time Charges in the Project Center.

To delete a booking row, click the More icon ⋮ in the Actions column and select **Delete**. A message appears confirming the booking was deleted successfully.

All business rules are respected — you will not be able to delete a booking if your role does not permit it, or if the booking was either submitted for approval or approved.

All bookings in a grouped booking row will be deleted except if some of the bookings in the group cannot be deleted. If some of the bookings cannot be deleted, review each booking in the grouped booking row. Turn off the **Grouped** display option and try deleting each booking one by one.



> **Note:** Deleting a booking row is possible only when the booking grid measure shows Hours and the Actuals switch is OFF. See, Hours Worked in Past Weeks or Months (Actuals) and Viewing Hours, Time Costs, or Time Charges in the Project Center.

Project Schedule Calculation in the Project Center

The project schedule is recalculated automatically after:

- You modify the **Start** date or **Finish** date for a task.
- You drag a task into a phase and the task modifies the **Start** date or **Finish** date for the phase.
- You add or modify one or more predecessors to a task or phase.
- You add or modify **Planned hours**, if the project schedule calculation is based on assignments (default).
- You add or modify hours in the booking grid and click **Save**, if the project schedule calculation is based on bookings. For more information about calculating the project schedule based on bookings instead of assignments, see Basing Project Schedule Calculation on Bookings for a Project.

When you go to the project center or reload the project center page, SuiteProjects Pro checks if any changes impacting the project schedule were made outside of the project center and triggers the project schedule calculation if needed.

All calculated **Start** dates and **Finish** dates in the project sequence are updated. **Planned hours** are also updated if the project schedule calculation is based on bookings.

> **Note:** You can set individual projects to calculate the following information based on bookings instead of assignments:
>
> - Calculated task, phase and project **Start** dates and **Finish** dates.
> - **Planned hours**.
> - **% Complete**.
>
> For more information , see Basing Project Schedule Calculation on Bookings for a Project.

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.

Basing Project Schedule Calculation on Bookings for a Project

You can set individual projects to use bookings instead of assignments for project schedule calculation.

If the project schedule calculation is based on bookings instead of assignments:

- All calculated **Start** dates and **Finish** dates are updated based on bookings
  - If the task has no predecessor tasks or phases:
    - The task **Start** date is the project **Start** date .
    - The task **Finish** date is the latest booking end date out of all bookings to the task.
  - If the task has one or more Finish-to-Start or Start-to-Start predecessor tasks:
    - The task **Start** date is calculated based on all dependencies (the latest date to meet all the dependencies).
    - The task **Finish** date is the latest booking end date out of all bookings to the task, or the **Start** date + 1 day, whichever is the latest.
  - If the task has one or more Finish-to-Finish or Start-to-Finish predecessor tasks:
    - The task **Finish** date is calculated based on all dependencies (the latest date to meet all the dependencies).
    - The task **Start** date is the earliest booking start date out of all bookings to the task, or the project **Start** date if it is later than the earliest booking start date.

  > **Note:** All task fixed **Start** dates and fixed **End** dates remain unchanged.
  >
  > The earliest **Start** date for a task is always the project start date. You cannot set an earlier fixed **Start** date for a task.

- **Planned hours** are calculated based on bookings, instead of being set at the task level or calculated from task assignments. It is the sum of all hours booked to the task, phase or project. The **Planned hours** field on the task entity form is read-only when schedule calculation for the associated project is based on bookings.

- **% Complete** is calculated based on bookings. For tasks, **% Complete** indicates the amount of work completed on the task (from approved time entries) compared to **Planned hours** (sum of all hours booked to the task).

> **Important:** Review the following guidelines:
>
> - Only the calculated **Start** dates, calculated **Finish** dates, **Planned hours**, and **% Complete** are calculated based on bookings instead of assignments.
> - Using bookings instead of assignments for project schedule calculation may impact other functionality that are based on assignments. Test extensively on a sandbox account and consider the impact carefully before you start using this feature on a production account.
>
>   Examples of functionality that may have a dependency on assignments:
>   - Charge projections based on assigned hours.
>   - Earned value management (EVM) metrics.
>   - Billing rule rate override at the assignment level.
>   - Planned/assigned hours adjustment based on approved hours.
>   - Pending bookings from task assignments.
>   - Any user scripts or integrations with dependency on assignments.

To base project schedule calculation on bookings for a project:

1. Create the `project_plan_based_on_bookings` custom field.
   a. Go to Administration > Global Settings > Custom Fields.
   b. Click the Create button, then click **New Custom field**.

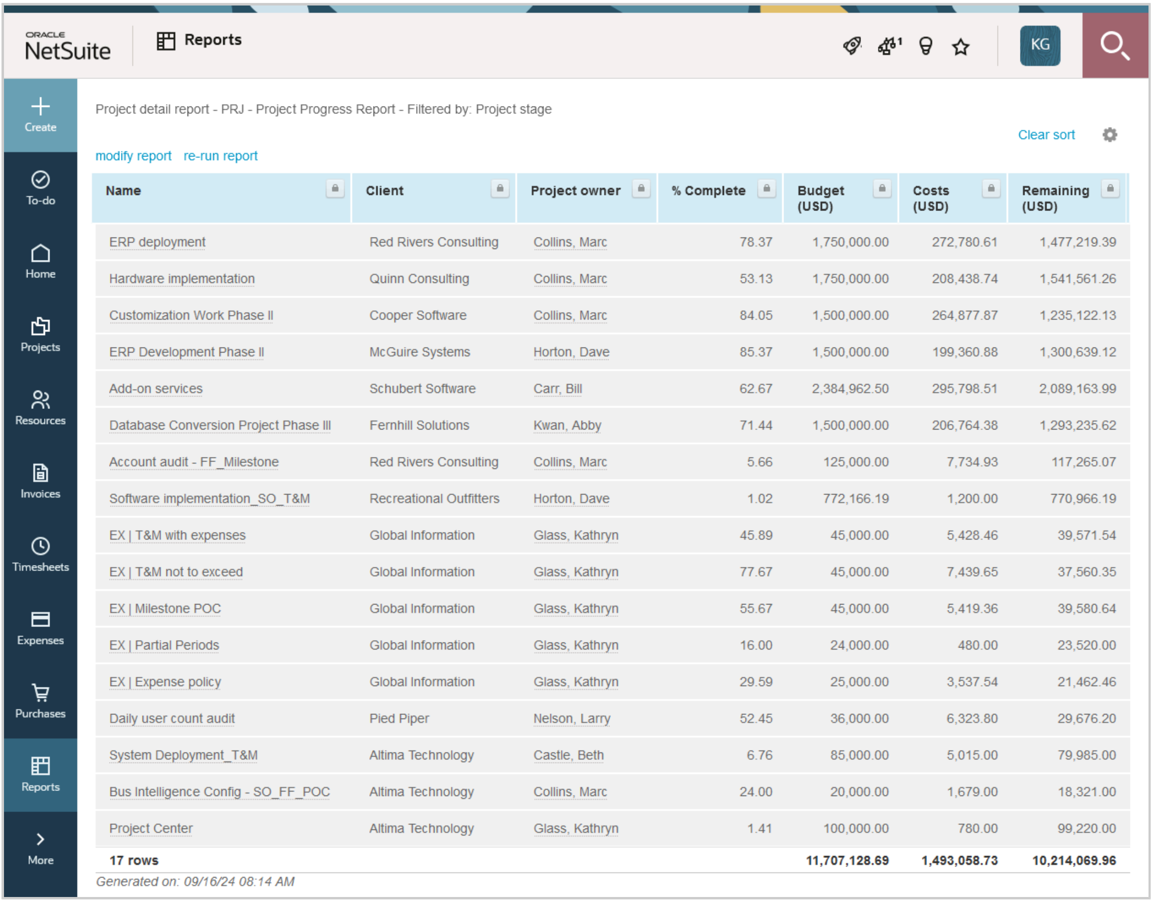
      A form appears.
   c. Select *Project* from the **Add a custom field to** dropdown list (under Global).
   d. Select *Checkbox* from the **Type of field to add** dropdown list.
   e. Click **Continue**.

      Another form appears.
   f. Enter the **Field name** — This must be exactly `project_plan_based_on_bookings`.
   g. Check the **Active** box.
   h. Enter a **Display name** — For example, `Calculate project schedule based on bookings`.
   i. Click **Save**.
2. Go to Projects > Projects > [*Select a project*] > Properties.
3. Check the **Calculate project schedule based on bookings** box.
4. Click **Save**

Working with Reports

Reports

Reports take their layout from the Lists — Previous UI Version Layout.



Project detail report - PRJ - Project Progress Report - Filtered by: Project stage

Name	Client	Project owner	% Complete	Budget (USD)	Costs (USD)	Remaining (USD)
ERP deployment	Red Rivers Consulting	Collins, Marc	78.37	1,750,000.00	272,780.61	1,477,219.39
Hardware implementation	Quinn Consulting	Collins, Marc	53.13	1,750,000.00	208,438.74	1,541,561.26
Customization Work Phase II	Cooper Software	Collins, Marc	84.05	1,500,000.00	264,877.87	1,235,122.13
ERP Development Phase II	McGuire Systems	Horton, Dave	85.37	1,500,000.00	199,360.88	1,300,639.12
Add-on services	Schubert Software	Carr, Bill	62.67	2,384,962.50	295,798.51	2,089,163.99
Database Conversion Project Phase III	Fernhill Solutions	Kwan, Abby	71.44	1,500,000.00	206,764.38	1,293,235.62
Account audit - FF_Milestone	Red Rivers Consulting	Collins, Marc	5.66	125,000.00	7,734.93	117,265.07
Software implementation_SO_T&M	Recreational Outfitters	Horton, Dave	1.02	772,166.19	1,200.00	770,966.19
EX | T&M with expenses	Global Information	Glass, Kathryn	45.89	45,000.00	5,428.46	39,571.54
EX | T&M not to exceed	Global Information	Glass, Kathryn	77.67	45,000.00	7,439.65	37,560.35
EX | Milestone POC	Global Information	Glass, Kathryn	55.67	45,000.00	5,419.36	39,580.64
EX | Partial Periods	Global Information	Glass, Kathryn	16.00	24,000.00	480.00	23,520.00
EX | Expense policy	Global Information	Glass, Kathryn	29.59	25,000.00	3,537.54	21,462.46
Daily user count audit	Pied Piper	Nelson, Larry	52.45	36,000.00	6,323.80	29,676.20
System Deployment_T&M	Altima Technology	Castle, Beth	6.76	85,000.00	5,015.00	79,985.00
Bus Intelligence Config - SO_FF_POC	Altima Technology	Collins, Marc	24.00	20,000.00	1,679.00	18,321.00
Project Center	Altima Technology	Glass, Kathryn	1.41	100,000.00	780.00	99,220.00
17 rows				11,707,128.69	1,493,058.73	10,214,069.96

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Reporting controls can be found in the header.

Report Management and Editor

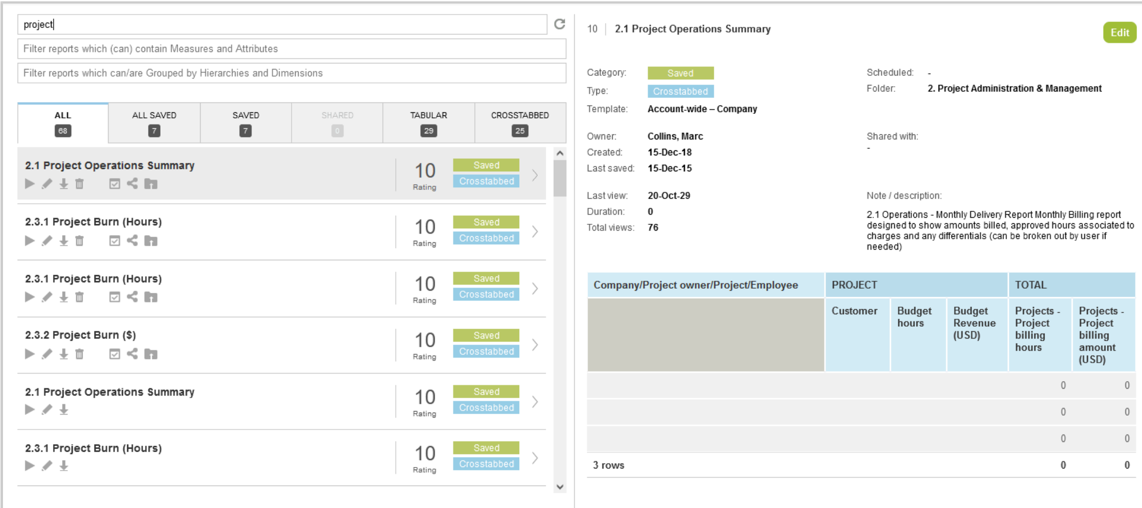
Note: The functionality described in this help topic is only available if the Report Management and Editor optional feature is enabled for your account and if you have sufficient privilege to access the feature. For more information contact your account administrator.

The Report Management and Editor optional feature lets you:

- Search for saved reports and report templates by name or content. The interface shows a list of results as you type and lets you preview the configuration of each report. You can perform all available report actions directly from the search results.
- Edit saved reports or create new reports from templates using the report editor. The report editor lists available dimensions and measures, which you can drag into your rows and columns to create

your report. You can also select filters and preview your report layout as you edit the report. You can preview the report data, run and view the full report directly from the report editor.

> **Note:** Advanced reports are not currently supported in the Report Management and Editor interface.

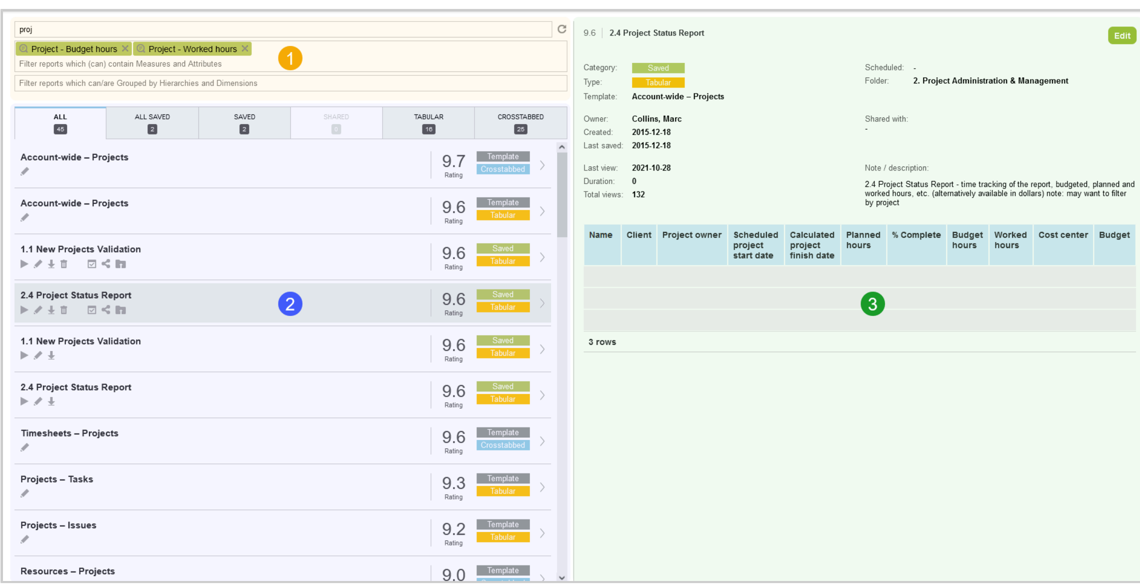


Searching Reports in the Report Management Interface

> **Note:** The functionality described in this help topic is only available if the Report Manager and Editor optional feature is enabled for your account and if you have sufficient privilege to access the feature. For more information contact your account administrator.

The report management interface lets you search for saved reports and report templates by name or content. The interface shows a list of results as you type and lets you preview the configuration of each report. You can perform all available report actions directly from the search results.

To access the report management interface, go to Reports > Management.



The report management interface includes the following panels:

1. **Search panel** — You can search report templates and saved reports by:
   - Name
   - Measures or attributes (columns) available for inclusion in the report
   - Hierarchies or dimensions (rows) available for inclusion in the report
2. **Results panel** — 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.
   - Results are organized in tabs. Depending on your access privileges, tabs may include **All** (all reports you have access to), **All Saved** (all saved reports you have access to), **My Saved** (saved reports you own), **Shared** (saved reports others have shared with you), **Tabular** report templates, **Crosstabbed** report templates. The number of reports available in each tab is indicated under the tab title.
   - Each report template has a rating between 0 and 10, depending on how often the template is used by SuiteProjects Pro users. Report templates that are used very often have a rating of **10**, reports that are rarely or never used have a rating of **0**. Saved reports have the same ratings as the report templates they are based on.
   - Each result entry includes the name of the report and icons corresponding to the actions available for this report.

Action Icon	Description
	Run the report.
	Edit the report in the report editor. See Creating and Editing Reports in the Report Editor.
	Download the report as CSV, HTML or PDF.
	Delete the report.
	Schedule the report — Configure SuiteProjects Pro to run and send or publish the report automatically at regular intervals.
	Share the report with other employees in your company.
	File the report in a specific folder in SuiteProjects Pro.

   - Click a report name to preview the report.
3. **Preview panel** — 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.

   Click **New** to create a new report from a template, or **Edit** to modify a saved report using the report editor. See Creating and Editing Reports in the Report Editor.

   The report information includes the following details:
   - The **Report rating** appears in the top left corner, next to the **Report name**.
   - The **Category** indicates whether it is a saved report, a report template, or a shared report.
   - The **Type** indicates whether the result is a tabular (detail) or crosstabbed (summary) report. Advanced reports are not currently supported in the report management interface.
   - Which report **Template** this saved or shared report is based on (if applicable).
   - The **Owner** of the report

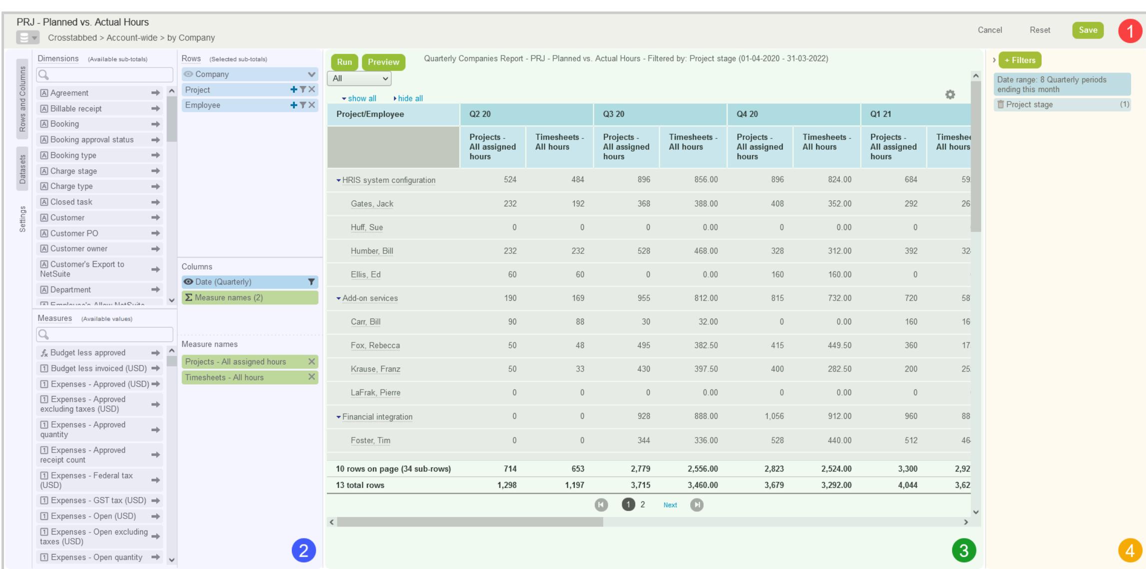
- The date when the report was **Created**.
- The date when the report was **Last saved**.
- The date when the report was **Last viewed**.
- The **Duration** of the last run for this report.
- The **Total views** (total number of views) for this report across all account users.
- When the report is **Scheduled** to run automatically (if applicable).
- The **Folder** this report is filed in.
- Who the report is **Shared with**.
- Report **Notes / description**
- **Template specification** — The following additional information is shown for report templates.
  - **Intro** — Brief description of the template report and its layout.
  - **Dataset** — Which SuiteProjects Pro tables the information in this report template is sourced from.
  - **Grouping** — The primary grouping and other potential groupings for this report template.
  - **Hierarchy** — Which hierarchies are supported (if applicable).

Creating and Editing Reports in the Report Editor

The report editor lets you create, edit, test, and run reports from a single page, without the need to switch between forms and previews or to refresh the page.

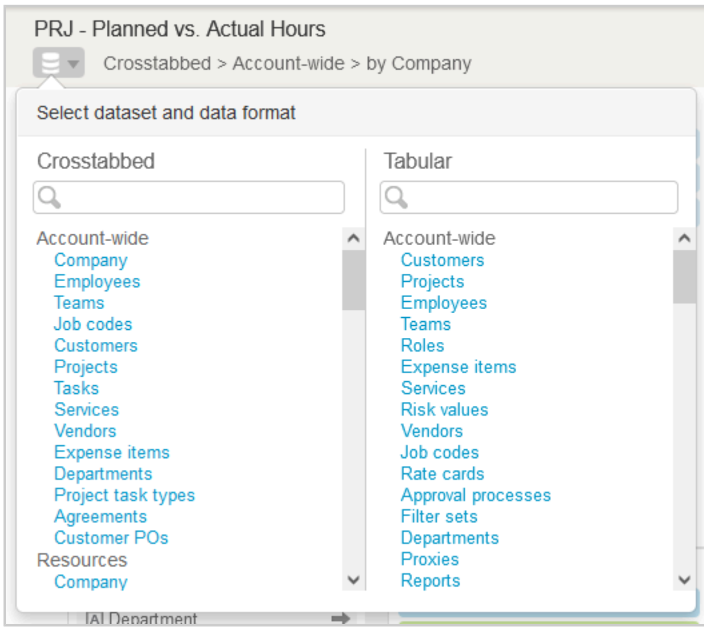
To access the report editor, go to Reports > Management, search for saved report or report template, then do one of the following:

- Click the edit icon under the name of the report in the results panel.
- Click **New** in the preview panel (to create a new report from a report template).
- Click **Edit** in the preview panel (to modify a saved report).



The report editor includes the following elements:

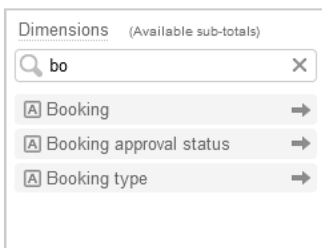
1. **Report header** — The report header shows the report name and the template the report is based on. The report also lets you enter a new name for the report, select a different report template to create a new report, and save or discard the changes made.
   - To change the report name, click the report name and enter a new name. The default name for a new report is "Untitled".
   - To create a new report from a different report template, click the dataset icon and select the report template.

   - The report header for tabular (detail) reports include a **Rollup** box. Check the **Rollup** box to add the ability to aggregate and drill down your report data to different levels defined by non-measurable attributes in your report layout.
   - To save changes made to your report, click **Save**, to clear the report configuration and revert to the default template report configuration, click **Reset**, to discard unsaved changes and go back to the report management interface.
2. **Report configuration pane** — The report configuration pane includes three vertical subtabs.
   - **Rows and Columns** — The Rows and Columns subtab shows the information currently included in the report layout. For roll-up tabular reports and crosstabbed reports, it includes three panes, with lists of rows, columns and measure names in the report. For standard tabular reports, it includes the Rows pane only. The Rows and Columns subtab includes the following functionality:
     - Dimensions (non-measurable attributes or aggregation levels) and dates show with a light blue color background. Measures (aggregated values) show with a green color background.
     - Drag a row, column or measure to change the order of rows, columns or measures in the report.
     - Click the remove icon to remove the row, column or measure from the report.
     - Click the visible icon to show or hide a row or a column. The icon shows in dark gray color when the row or column is visible on the report, and in light gray color when the row or column is hidden.

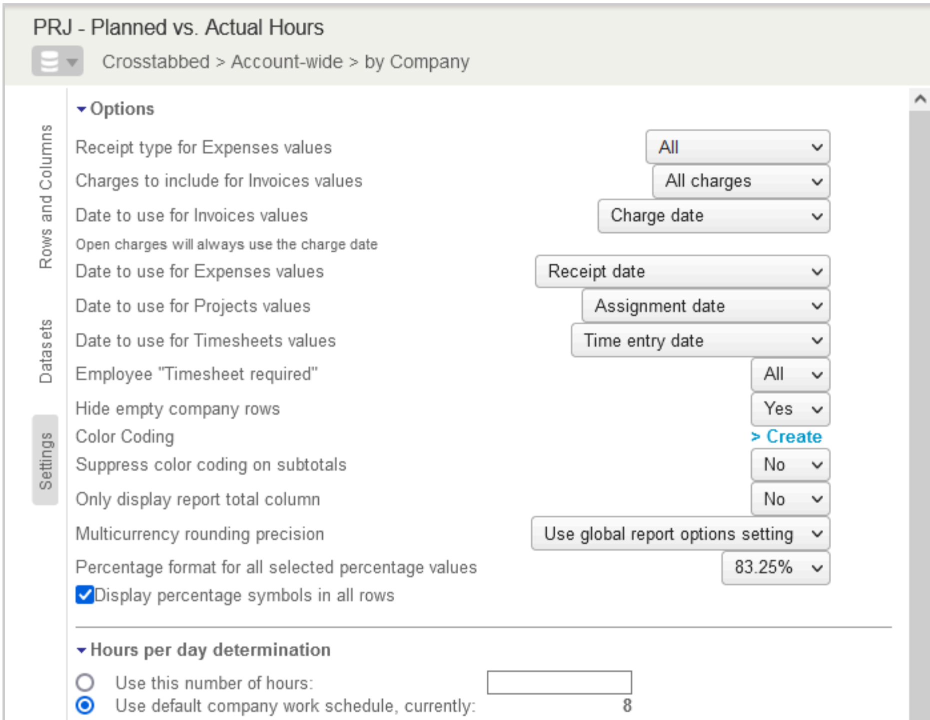
- Click the total icon to show or hide total columns for all measures. The icon shows in dark gray color when the total columns are visible on the report, and in light gray color when the total columns are hidden.
- Click the filter icon to add or modify a filter based on the row or column. The icon shows in dark gray color when there is an active filter, and in light gray color when there are no active filters.
- Click the add icon to add an entity attribute or dimension to the report.
- Click the edit icon to modify the list of entity attributes or dimensions included on the report.

- **Datasets** The Datasets subtab shows the information that you can include in the report layout. For roll-up tabular reports and crosstabbed reports, it includes two panes, with lists of dimensions (aggregation levels defined by non-measurable attributes) and measures (aggregated values). For standard tabular reports, it includes the Attributes pane only. The Datasets subtab includes the following functionality:
  - Enter a few characters into the search bar to filter the list of attributes, dimensions, or measures as you type.



  - Icons indicate the dimension or measure type:
    - Dimensions: (Text) or (Hierarchy).
    - Measures: (Count or Total), (Time - Calculated from the number of days), (Time - Calculated from the number of hours), or (Custom calculation).
  - Point to an attribute, a dimension, or a measure to view a tooltip description.
  - Click an attribute, a dimension, or a measure to add it to your report. You can also drag it to the **Rows**, **Columns** or **Measures** panel. The cursor changes to indicate valid or invalid drop locations.

- **Settings** — The Settings subtab shows a form with other report configuration settings.



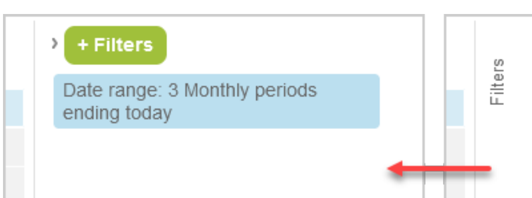
> **Note:** You can use the Rows and Columns and Datasets subtabs side by side in the configuration pane to add attributes, dimensions and measures to your report. However, the Settings subtab cannot be shown alongside another subtab.

3. **Report View or Preview pane** — Preview your report layout without data as you change the configuration. Click **Preview** to test your report with sample data limited to one record, click **Run** to run the full report.

4. **Filters pane** — The filters pane lets you review and modify existing filters, or add new filters to include only the information you want to report on.

   Click **+ Filters** to add a new filter, or click a filter to modify it. A window appears to let you define the filter or select the values you want to include or exclude.

   The filters pane can be minimized. Click the arrow pointing right to minimize the filters pane, or click Filters to view the filters pane.



Configuring SuiteProjects Pro to Run and Deliver a Report Automatically

You can use the Schedule feature in the Reports application to run and deliver your reports automatically at regular intervals.

To configure SuiteProjects Pro to run and deliver a report automatically:

1. Go to Reports > Saved reports > My reports, or to Reports > Management.
2. Locate the report you want to run automatically.
3. Click the schedule icon in the **Action** column or under the report name. The Schedule report form appears.
4. In the General section of the Schedule Report form:
    a. Check the **Run the report at the following time** box.
    b. Select a **Day** and time (Eastern Time | UTC-5) to set the frequency of publication. The publication schedule can be set to run everyday, or on a specific day of the week or month.
    c. Check the **CSV** box to include the report as a CSV file.
    d. Chek the **PDF** box to include the report as a PDF file.
5. In the Email options section of the Schedule form:
    a. Check all applicable boxes under **Email the generated files to**. The report are sent to your email address by default but you can also check the **All the employees who share the report** box, or check the **Additional contacts** box and click **Create** to select the contacts you want to include.
    b. Enter the sender email address to use under **The email is from**.

    > **Note:** Depending on the configuration of your company's SuiteProjects Pro account, sending system-generated email from a custom address may not be permitted. When this is the case, a note under the text box advises you so, and email is sent from `www@openair.com`.

    c. Enter a **Subject** line. The default value is `Scheduled Report: [Report Name]`.
    d. (Optional) Enter additional text for the body of the message under **Optional email text**.

    > **Note:** Metavalues such as %%date%% are not supported in scheduled report email subject line and message body.

6. Check the **Email me additional information if the report returns no data** if you would like to receive an email notification if the report returns no data.
7. Click **Save**.

Personal Settings

Click **Personal settings** in the User Menu to configure your personal settings and optional features. Personal Settings override any corresponding settings set by your company.

> **Note:** The options which you see in your Personal Settings depend on your user role and your company's settings. Some options may not be available to you.

General

Allow support log in

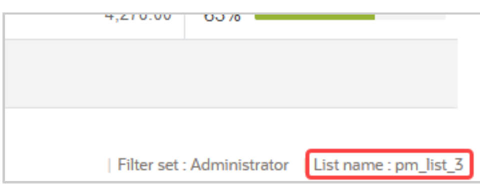
When checked, SuiteProjects Pro Support representatives can sign in to a copy of your company's SuiteProjects Pro account in a test environment for investigation, if required. This setting is used for troubleshooting and support.

> **Note:** This setting is used for troubleshooting and support. It does not authorize SuiteProjects Pro Support to access your production, sandbox or release preview account.

Optional Features

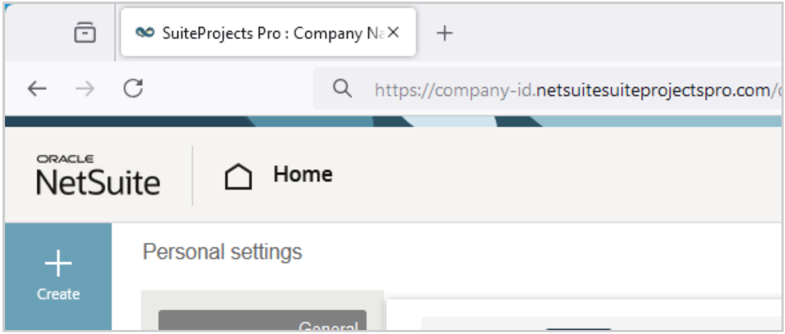
Show the list name in page footer

Displays the list name in the bottom right corner of the screen when viewing a list.



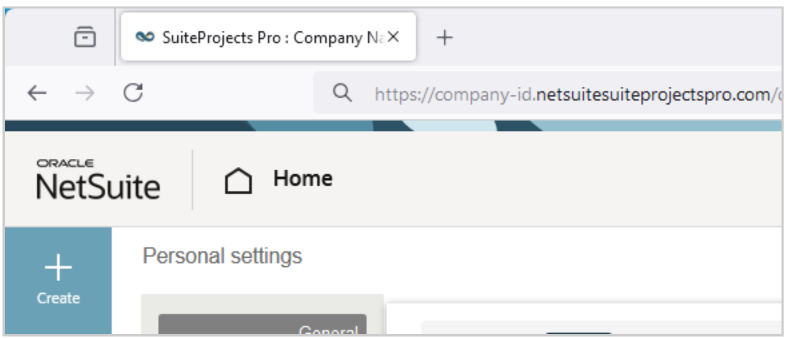
Show currently active module name in the browser title bar

Check this box to show the name of the active module in the browser bar or tab. When this box is cleared, the browser bar or tab shows “SuiteProjects Pro” only.



Show company name in the browser title bar

Check this box to show the company name in the browser bar or tab. When this box is cleared, the browser bar or tab shows “SuiteProjects Pro” only. The company name which appears is the same as the Company ID used on the SuiteProjects Pro sign-in page.



Disable shortcut

Check to hide the navigation shortcuts functionality. For more information about navigation shortcuts, see Shortcuts.

Note: This preference is available only if the Navigation Shortcuts feature is enabled for your company's SuiteProjects Pro account.

Time Settings

Time zone

Controls which time zone is used in SuiteProjects Pro.

Use 24–hour clock for time entry and display

When selected, SuiteProjects Pro uses 24–hour time (for example, 1:00 p.m. will appear as 13:00) for displaying time in SuiteProjects Pro. When cleared, SuiteProjects Pro will display time using the 12–hour clock with “AM/PM” notation.

Regional Settings

Language

Controls the language used in SuiteProjects Pro.

Date format

Controls how dates are displayed in SuiteProjects Pro.

Number format

Controls how numbers and decimals are displayed throughout SuiteProjects Pro, including whether a decimal is represented by a period (.) or comma (,), and which delimiter SuiteProjects Pro uses for digit grouping in numbers larger than 999.

List separator for CSV output files

Controls which list separator (for example, a comma (,) or a semi-colon (;)) is used to separate values in CSV output files.

Print Settings

Page size for generating PDF pages

Controls whether SuiteProjects Pro generates PDF files in Letter or A4 size.

Dashboard Options

Display zero items on dashboard

Displays the entire array of reminder and status options available in the dashboard tab, even if there are no active items requiring attention. This option is disabled by default because the full set of items may be long if you have access to all service modules.

Timesheet Options

Sort timesheets alphabetically by customer and project

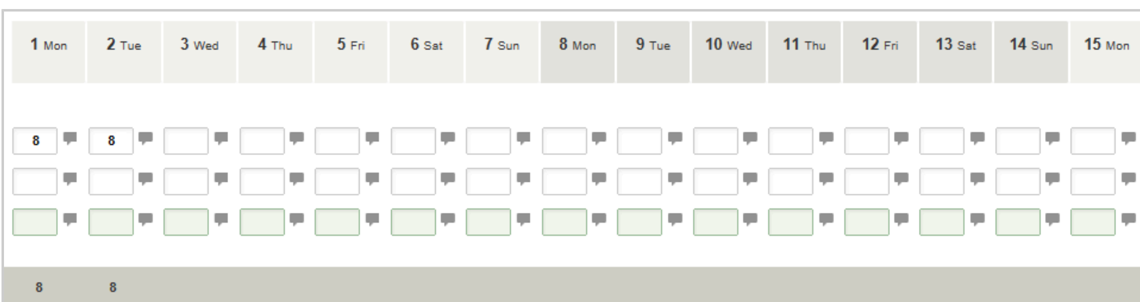
This setting re-sorts time entries by customer and project after saving. As time entries are input into the timesheet and submitted, the customer:project entries are sorted alphabetically within each day instead of the order they are entered.

Enable start and end time entry on timesheets

When checked, you can enter a start time and end time for each time entry. It can be used to record start and end time for a portion of the day when you worked on a particular project or task. You can also add a start time column and end time column to the time entry list.

Display all weeks for timesheets containing multiple weeks

When this feature is enabled, you can work with all the weeks of a multi-week timesheet in the same grid view.



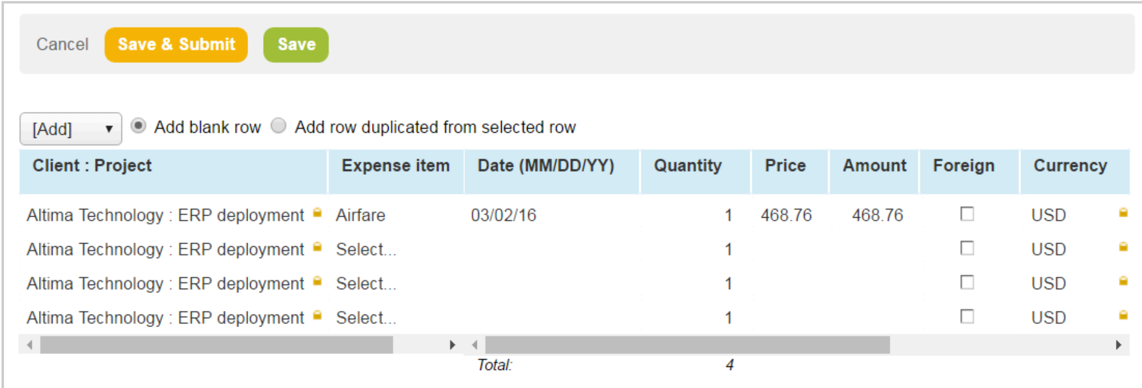
Enable Approvals on Mobile apps for Timesheets

Check this box to be able to view timesheets awaiting your approval in SuiteProjects Pro Mobile.

Expenses Options

Default to expense worksheet when viewing an expense report

Automatically displays the expense worksheet when you create an expense report instead of displaying the receipts form.



Enable Approvals on Mobile apps for Expenses

Check this box to be able to view expense reports awaiting your approval in SuiteProjects Pro Mobile.

Invoices Options

Disable confirmation when using the ‘Generate New Revenue container’ section on invoices.

When this box is cleared, an “Automatically Generate New Revenue container” confirmation dialog appears when you click “Generate Revenue Container” or “Submit and Generate Revenue Container” in an invoice. Check this box to disable this confirmation dialog. You can also set this preference in the confirmation dialog when it appears.

Projects Options

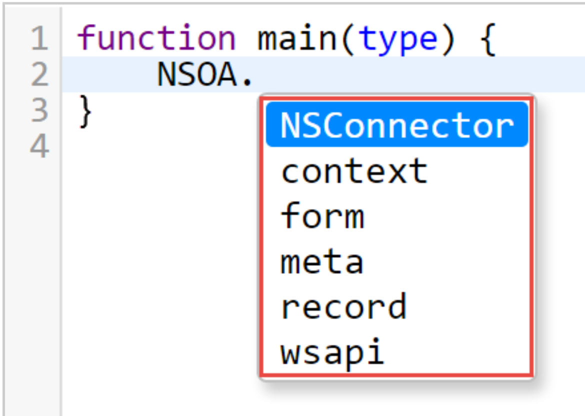
Preferred landing page for projects

Controls which page opens when a project is opened, for example, the Task List or Properties.

Scripting Studio Options

Enable script deployment editor content assist auto activation

When selected, when you type the text “NSOA” into the Scripting Studio editor, and then type a period (.), the Auto List window appears with all available options which can follow “NSOA.” in a script.



The user has the following options:

- Click on the required item with the mouse and double-click to select it.
- Use the up and down arrow keys to select the required item and then hit 'Enter' to select it.
- Type the first character of the required item (e.g. 'm') to highlight it and then hit 'Enter' to select it. If more than one item starts with the same letter then the first item will be highlighted and the list of options filtered.
- Hit 'Esc' to close the Auto List window and type as normal. Clicking outside of the editor window will also close the Auto List window.

Tip: Press <Ctrl> + <Space> to show the Auto List window at any point in the editor.

After selecting an item from the Auto List window, the value will be copied into the editor and typing continues after the inserted value.

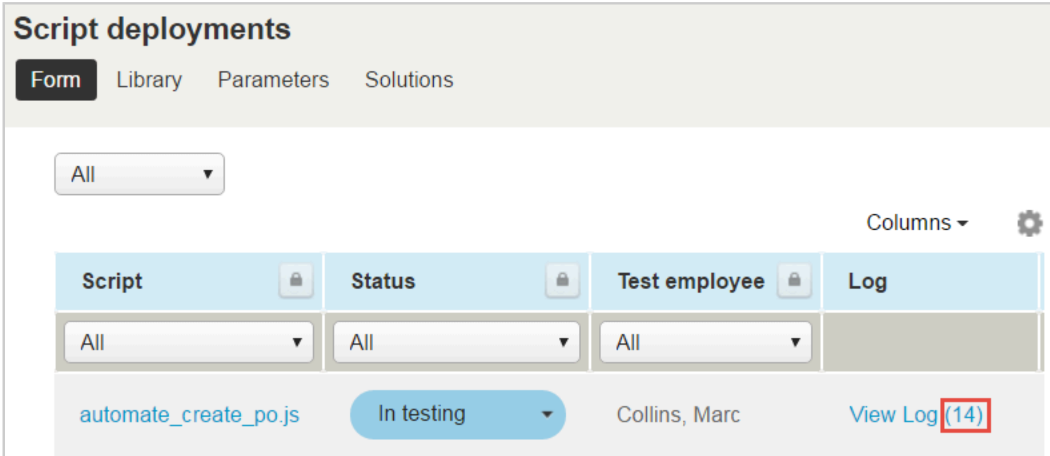
Script deployment editor content assist auto activation delay (milliseconds)

Controls the amount of time it takes for the Content Assist Auto Activation to appear after "NSOA." has been typed in the Scripting Studio editor. The default value is 500 milliseconds, and the field accepts any positive number. This setting has no effect if "Enable script deployment editor content assist auto activation" is not selected.

Important: Entering a value below 200 milliseconds may cause performance issues.

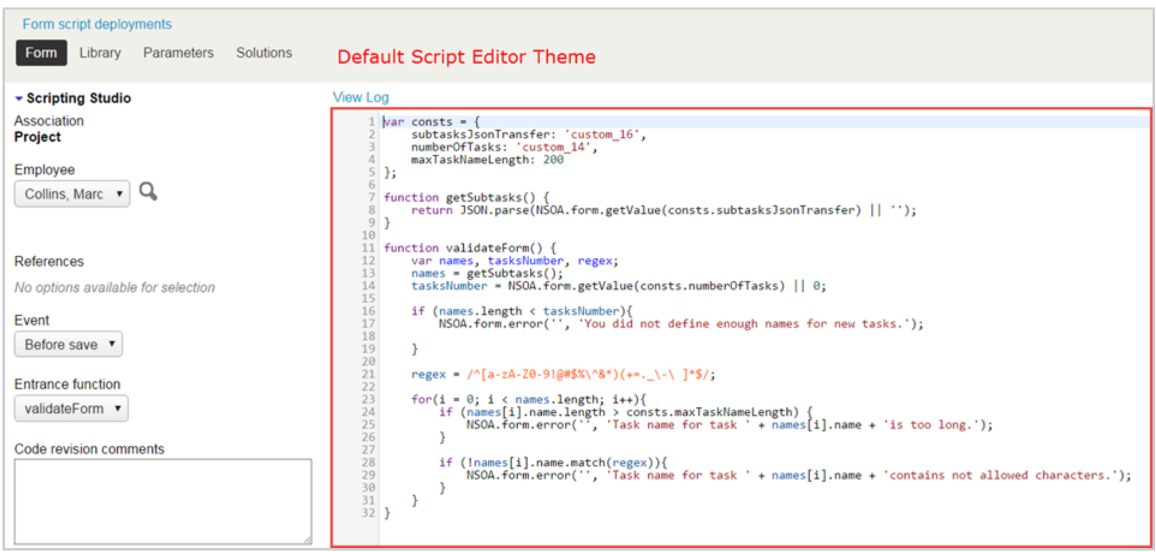
Display the number of logs at 'View logs' link

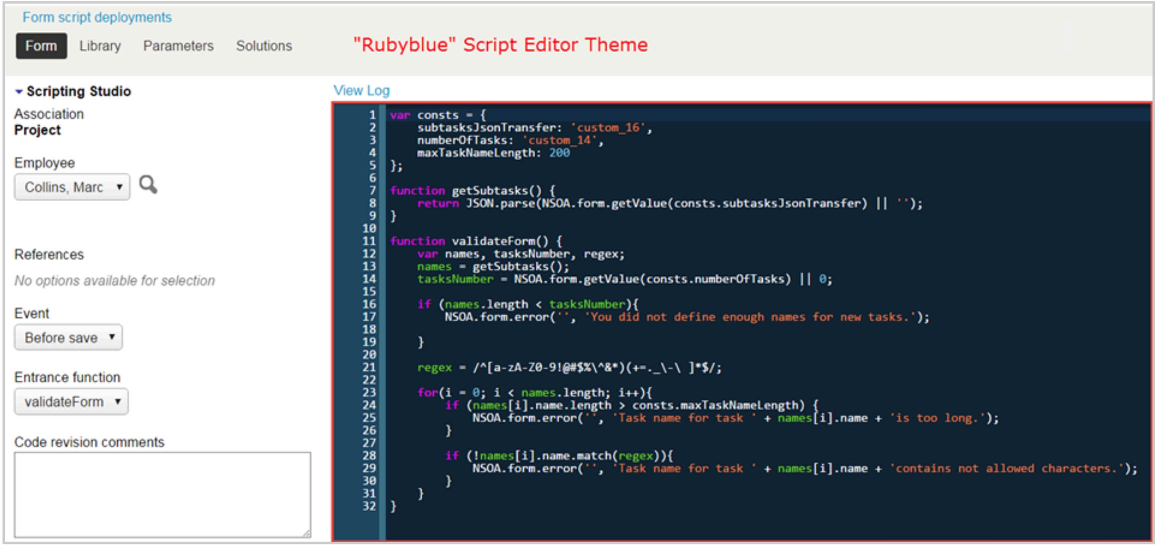
Displays the number of included logs next the **View Log** link in Script Deployments lists.



Editor Theme

Customize the script editor with a variety of selectable color schemes.





Font Size

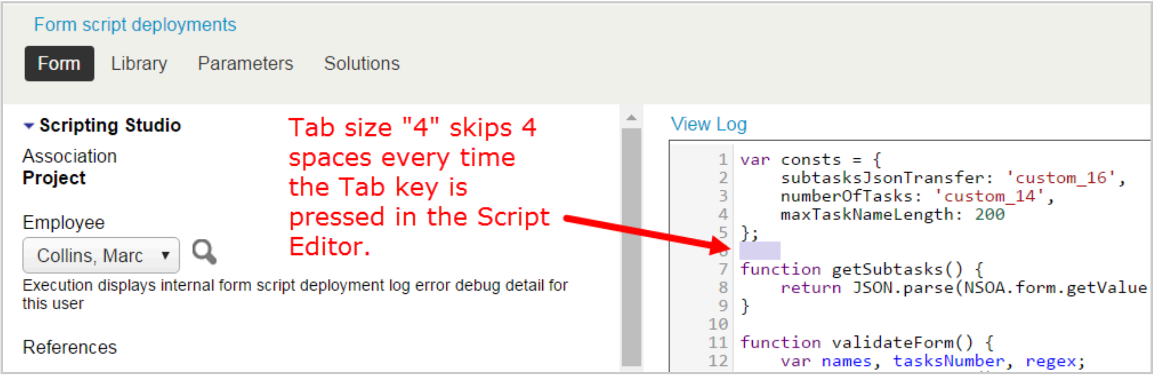
Customize the size of the text font in the script editor. This setting only affects the text within the Script Editor. All other text uses the “Text size” User Menu setting.

Indent Unit

Select whether an indent unit is a space or a tab in the script editor.

Tab Size

Set how many spaces a tab equals in the script editor.



Display Options

The following “Number of entries to display...” settings control how many entries appear in drop-downs throughout SuiteProjects Pro.

For example, if creating a charge, you may only want to see those customers and projects which you use most frequently when selecting from the drop-down list in the "New charge" dialog. If you limit the number of customer:project combinations which are displayed in these drop-downs, the drop-downs will display only those customers and projects which you have used most recently, up to the limit specified in these settings.

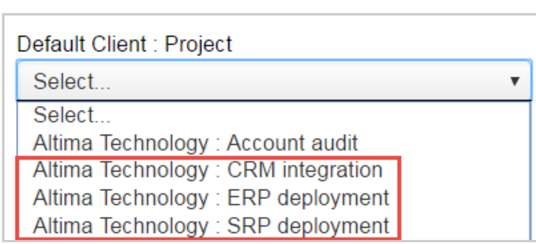
Tip: For the best performance, do not use the “All” option for the “Number of entries” settings.

- **Number of entries to display in customer:project drop-downs**
- **Number of entries to display in customer/prospect:deal drop-downs**
- **Number of entries to display in customer drop-downs**
- **Number of entries to display in expense item drop-downs**
- **Number of entries to display in product drop-downs**
- **Number of entries to display in employee drop-downs**
- **Number of entries to display in vendor drop-downs**
- **Number of entries to display in approver drop-downs**
- **Number of entries to display in workspace drop-downs**

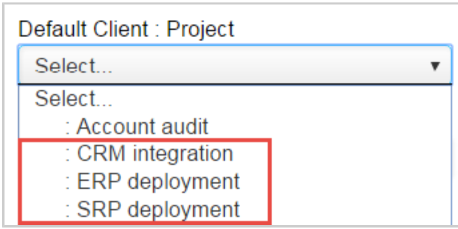
Shorten customer:project drop-downs

Controls how text appears within “customer:project” drop-downs. It contains three settings:

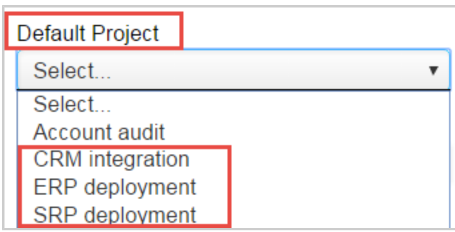
- **Do not shorten** — The drop-down displays both customer and project



- **Remove customer name, leave project name indented** — The drop-down displays a colon (:) and project name, but does not include the customer name

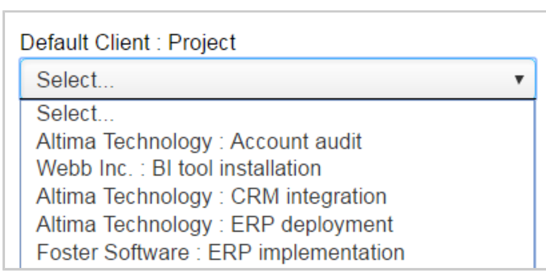


- **Remove customer name and indentation of project name** — Only displays the project name, and renames the “customer:project” drop-down to “project”.



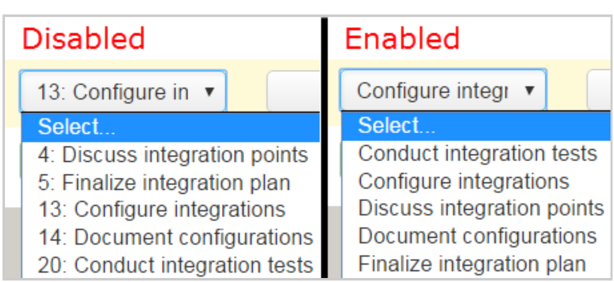
Sort the customer:project drop-downs by project

Sorts customer:project drop-downs alphabetically by project instead of by customer. The display order in the drop-down will still be “customer:project”.



Sort the task drop-downs by name and omit the ID number prefix

Displays tasks in task drop-downs in alphabetical order and removes the tasks’ number prefixes.



Maximum number of rows to display per day in ‘My Calendar’ monthly view

Controls how many rows are displayed for each day in the monthly “My Calendar” view.

Show ‘My Calendar’ tab in all modules.

Displays the “My Calendar” tab in all modules. When disabled, the “My Calendar” tab only appears in “Home”.

> **Note:** If you have been assigned the “View calendars for other users” role permission, you will always see the “Calendars” instead of the “My Calendar” link in “Home”. When “Show ‘My Calendar’ tab in all modules.” is enabled in this situation, you will see “Calendars” in “Home” and “My Calendar” in all other modules.

Show Account tab in ‘My Account’ module only.

This setting is no longer supported, and has no effect.

Remember the size of popup windows

This setting is no longer supported, and has no effect.

Disable automatic resizing of popup windows

This setting is no longer supported, and has no effect.

Add the save or run button to the top right of forms

This setting is no longer supported, and has no effect.

Add “Save & create another” button to the top right of forms

This setting is no longer supported, and has no effect.

Add approval buttons to the bottom of reports

Adds an Approve/Reject Items to the bottom of Timesheet reports, as well as at the top of the report.

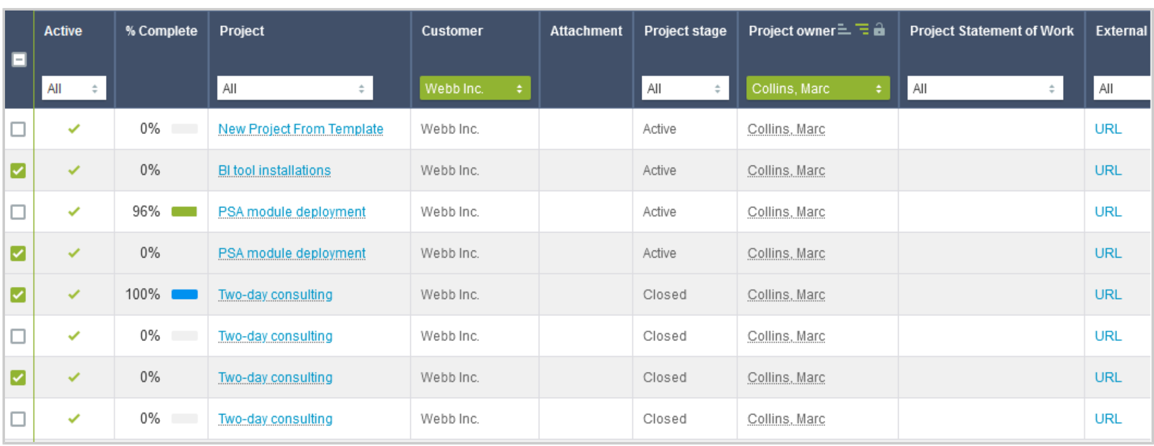
Anchor column titles at top of page when scrolling vertically

Column titles in lists and reports will remain in view when scrolling down the page.

Preserve row highlighting when checking boxes to select a row in list views

This setting has no effect on redesigned lists.

For lists using the previous UI layout, when you check a box to select a row in the list, the row is highlighted in yellow to indicate the selected rows. Several rows can be highlighted at once to show all selections made before saving the list.



	Active	% Complete	Project	Customer	Attachment	Project stage	Project owner	Project Statement of Work	External
	All		All	Webb Inc.		All	Collins, Marc	All	All
	✓	0%	New Project From Template	Webb Inc.		Active	Collins, Marc		URL
	✓	0%	BI tool installations	Webb Inc.		Active	Collins, Marc		URL
	✓	96%	PSA module deployment	Webb Inc.		Active	Collins, Marc		URL
	✓	0%	PSA module deployment	Webb Inc.		Active	Collins, Marc		URL
	✓	100%	Two-day consulting	Webb Inc.		Closed	Collins, Marc		URL
	✓	0%	Two-day consulting	Webb Inc.		Closed	Collins, Marc		URL
	✓	0%	Two-day consulting	Webb Inc.		Closed	Collins, Marc		URL
	✓	0%	Two-day consulting	Webb Inc.		Closed	Collins, Marc		URL

Enable anchoring of left columns when scrolling horizontally

This setting has no effect on redesigned list views.

Row titles in lists and reports will remain in view when scrolling across the page.

Hovering over menu links reveals menu options

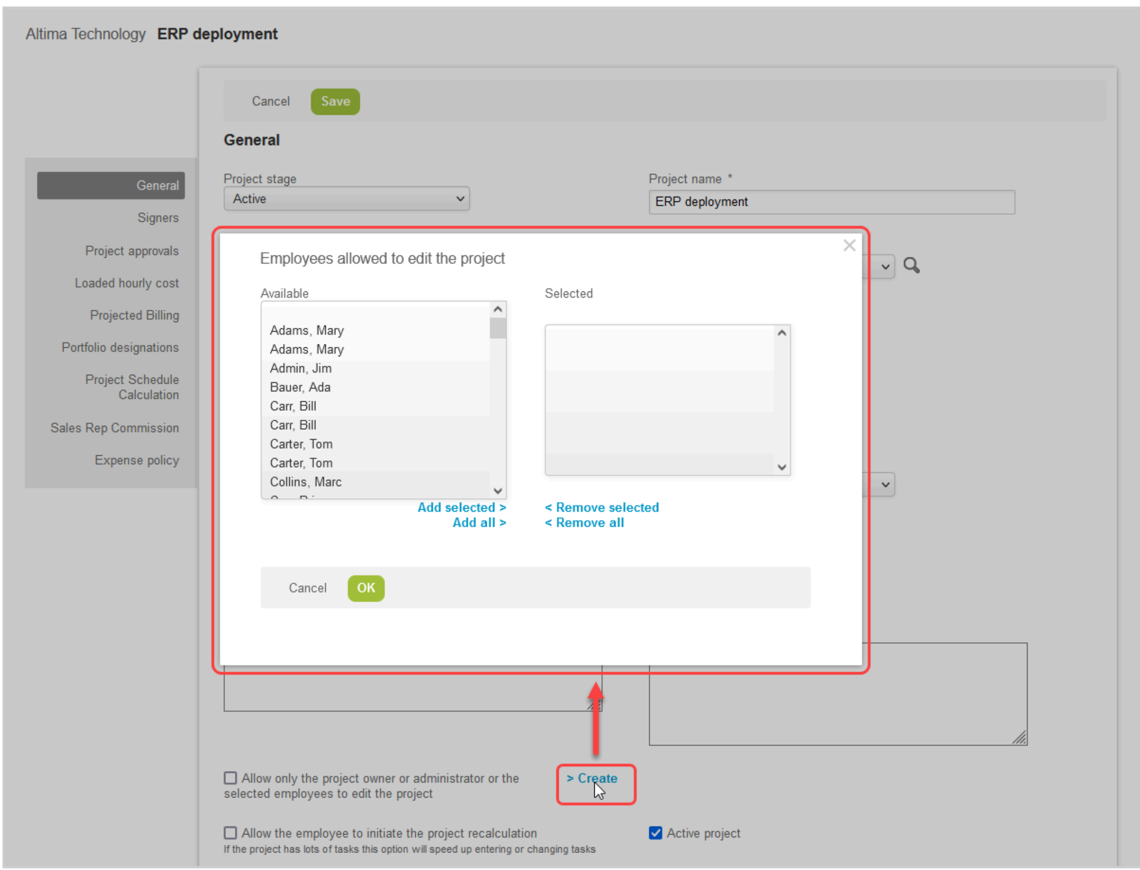
This setting has no effect on redesigned list views.

Drop-down menus open automatically when pointing to a menu. When this setting is disabled, click the menu link to open the drop-down.

Open popups as panels instead of windows.

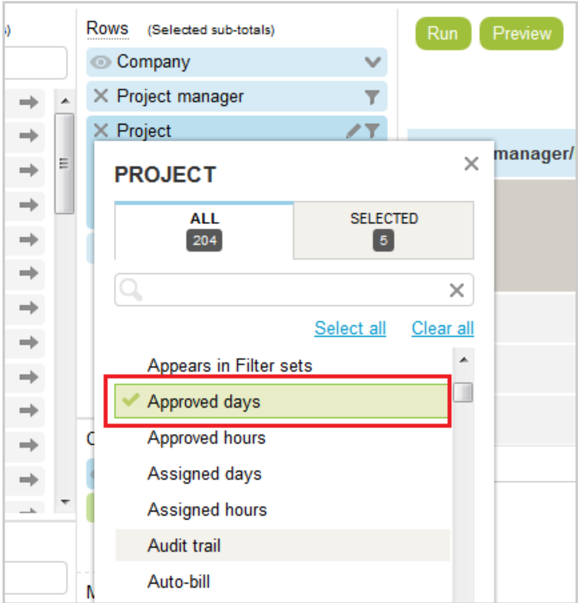
Opens popups as in-form panels, instead of new windows. In-form popups have all of the advantages of conventional popup windows, but appear as part of the form. This allows you to block popup windows in your browser and still use all SuiteProjects Pro functionality.

Tip: Using popup panels is best practice. You should check this box.



Use in-line multiple selection interface

Uses an in-line picker selection interface in various modules.



Disable QuickView

Disables QuickViews, preventing them from appearing when pointing to fields which open them.

QuickView popup activation delay

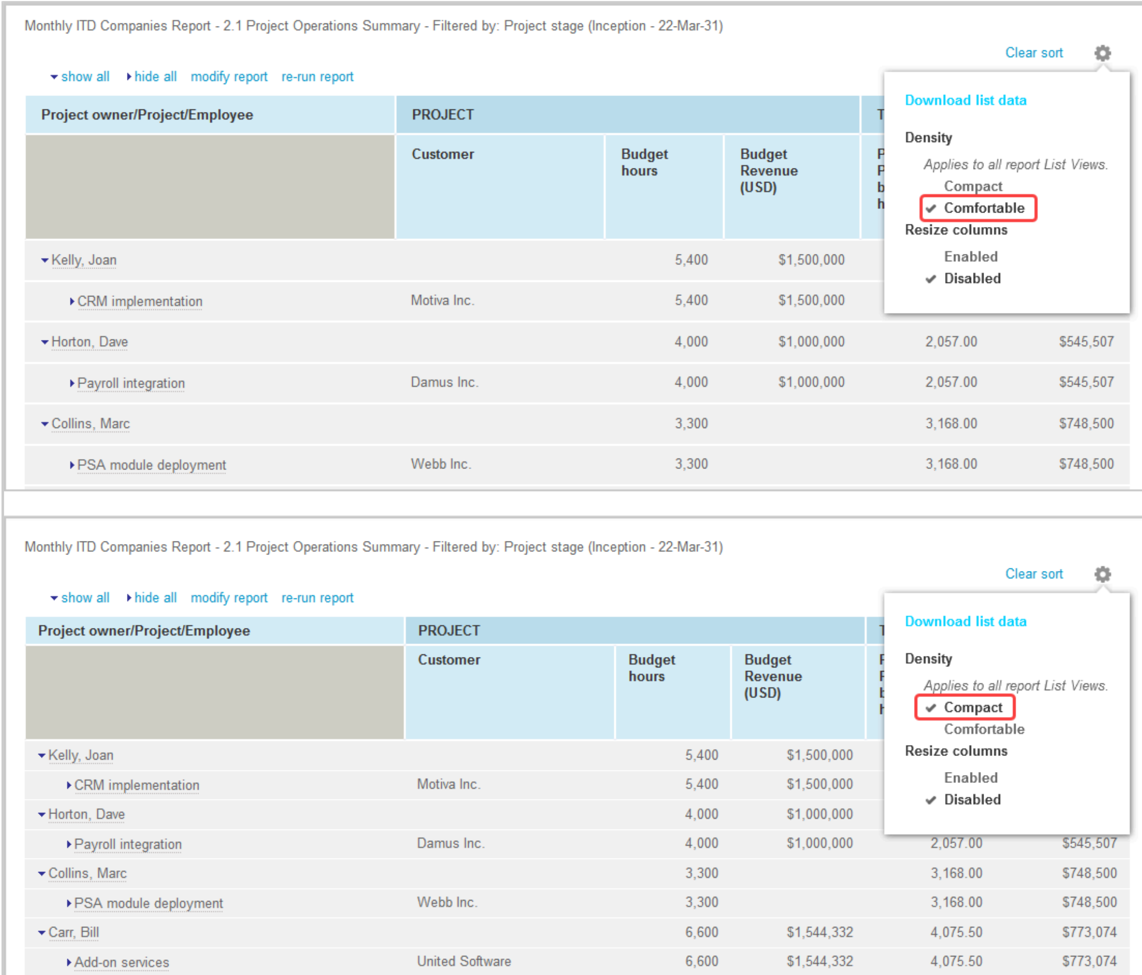
Sets the time it takes for a QuickView window to open when pointing to a field which opens a QuickView. The options available in the drop-down are time in seconds. This setting has no effect if “Disable QuickView” is selected.

Data Density

Control the data density displayed in list views with selected mode

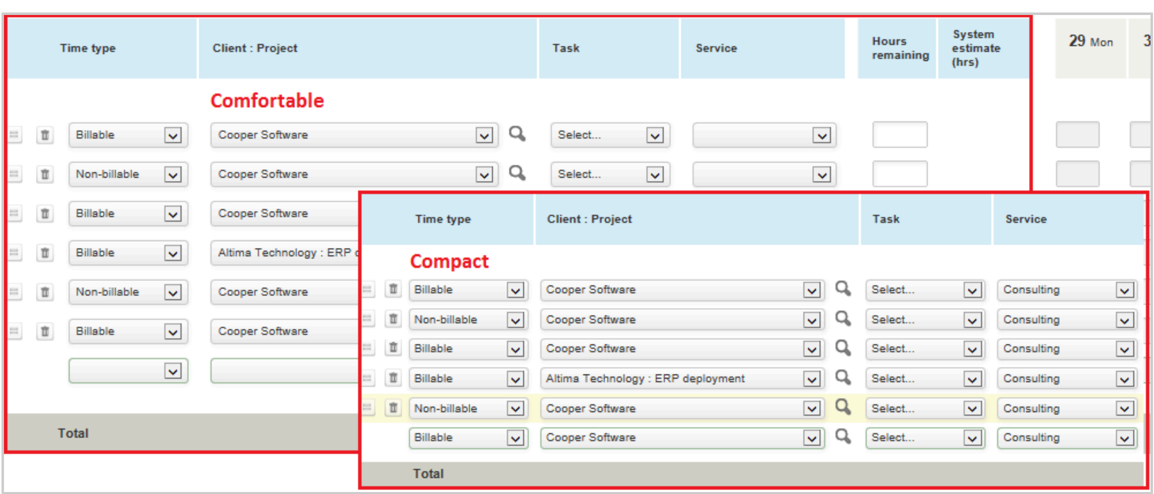
This setting has no effect on redesigned list views.

Controls the appearance of data in lists. In “Compact” mode, the margins are trimmed and headings wrap to make more data visible. “Comfortable” mode provides more spacing.



Control the data density displayed in timesheet grid with selected mode

Controls the appearance of data in timesheet grids. In “Compact” mode, the margins are trimmed and headings wrapped to make more data visible. “Comfortable” mode provides more spacing.



Starting Application

Controls which module is opened by default when signing in to SuiteProjects Pro.

Email Settings

Bcc me on all emails

Includes you as a Bcc recipient (i.e. other recipients do not see you on the recipient list) on all emails you send from SuiteProjects Pro, including from actions which trigger emails. For example, if you approve a timesheet, and the person who submitted the timesheet receives an automatic email notification of the approval, you will also receive a copy of the notification.

Authorized Applications

This Personal Settings section lists all the integration applications you have authorized to access SuiteProjects Pro on your behalf.

SuiteProjects Pro supports OAuth 2.0, a robust authorization framework. This authorization framework enables integration applications to access SuiteProjects Pro on your behalf without needing to store or ask for your sign-in details. Applications using this framework can only access SuiteProjects Pro on your behalf if you give them explicit permission to do so.

All the authorized applications listed in this section use the OAuth 2.0 framework to obtain access to SuiteProjects Pro. This section lets you revoke the permission given to any of your authorized application at any time.

For more information about authorizing and revoking applications, see Authorizing Applications to Access SuiteProjects Pro on Your Behalf.

Authorizing Applications to Access SuiteProjects Pro on Your Behalf

Integration applications let you connect SuiteProjects Pro with other applications and they extend what you can do with SuiteProjects Pro. Integration applications may use the OAuth 2.0 authorization protocol to gain access to your company's SuiteProjects Pro account.

The first time an application using the OAuth 2.0 protocol attempts to access SuiteProjects Pro on your behalf, you will need to give this application your explicit permission.

To authorize an application, you will typically use the following steps:

1. The application opens a browser and directs you to the same trusted sign-in page you normally use to sign in to SuiteProjects Pro — the SuiteProjects Pro sign-in page or your company Single Sign-on form appears.
2. Enter your sign-in details and click **Log in**.

An authorization page will appear indicating that the application `<application name>` would like to access your SuiteProjects Pro data.

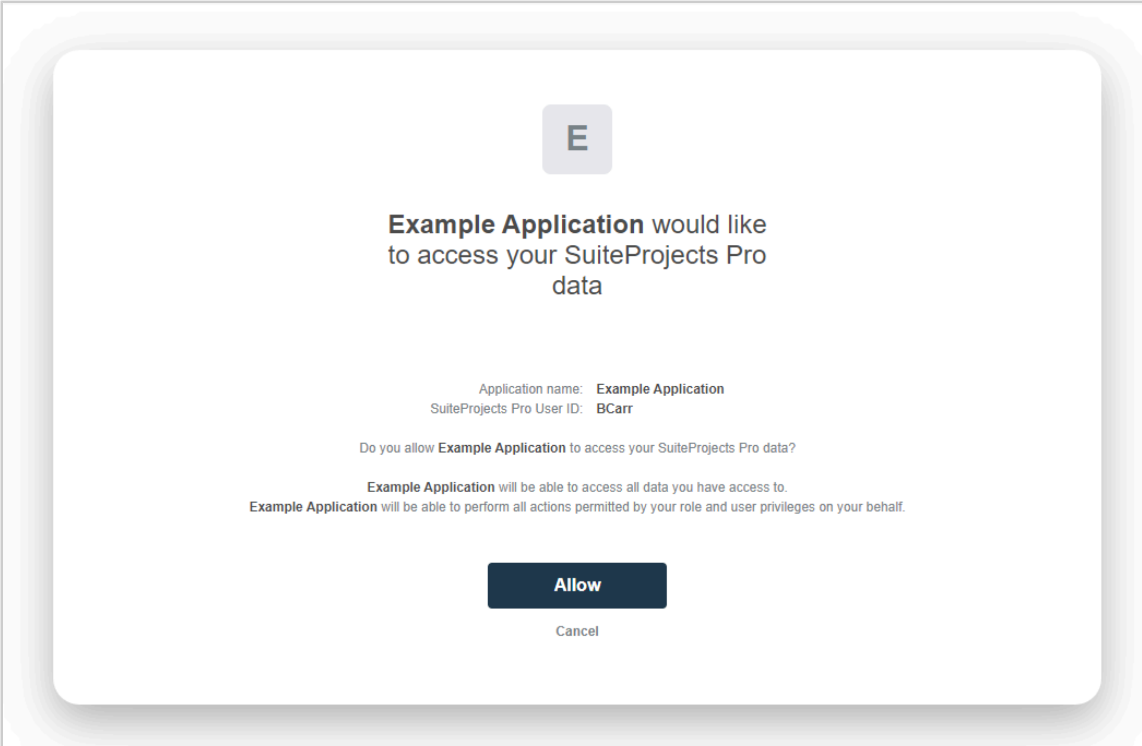
3. Read the content of the authorization page attentively. It should describe what the application does and how it will help you. It should also say what the application can do, for example:
   - The application will be able to access all data you have access to.
   - The application will be able to perform all actions permitted by your role and user privileges.

   > **Important:** **For Administrators** — Business rules configured for your company's SuiteProjects Pro account are applied when an integration application interacts with your SuiteProjects Pro data through the REST API. However, they are not applied when an integration application interacts with your SuiteProjects Pro data through the SOAP API or XML API — application developers must enforce business rules within their integration application if required. Business rules include SuiteProjects Pro account configuration settings and access control mechanisms, as well as any user scripts deployed on your company's SuiteProjects Pro account.

4. Click **ALLOW** to authorize the application or click **CANCEL** if you do not want the application to access SuiteProjects Pro on your behalf.

> **Note:** The steps may vary depending on the method you use to sign in to SuiteProjects Pro:
>
> - If you normally enter your company ID, user ID and password on the SuiteProjects Pro sign-in page, or if you enter your company ID on the SuiteProjects Pro sign-in page and then your password on your company single sign-on page, the above steps apply.
> - If you normally need to enter all sign-in details on your company single sign-on page to access SuiteProjects Pro without going to the SuiteProjects Pro sign-in page first (Identity Provider initiated Single Sign-on), you must sign in and launch SuiteProjects Pro before the application attempts to access SuiteProjects Pro on your behalf. The authorization page appears automatically. Follow steps 3 and 4 above. You do not need to re-enter your sign-in details.

Integration applications are registered and managed by your account administrator. They need to be enabled on your account before they can attempt to connect to SuiteProjects Pro and request your permission.



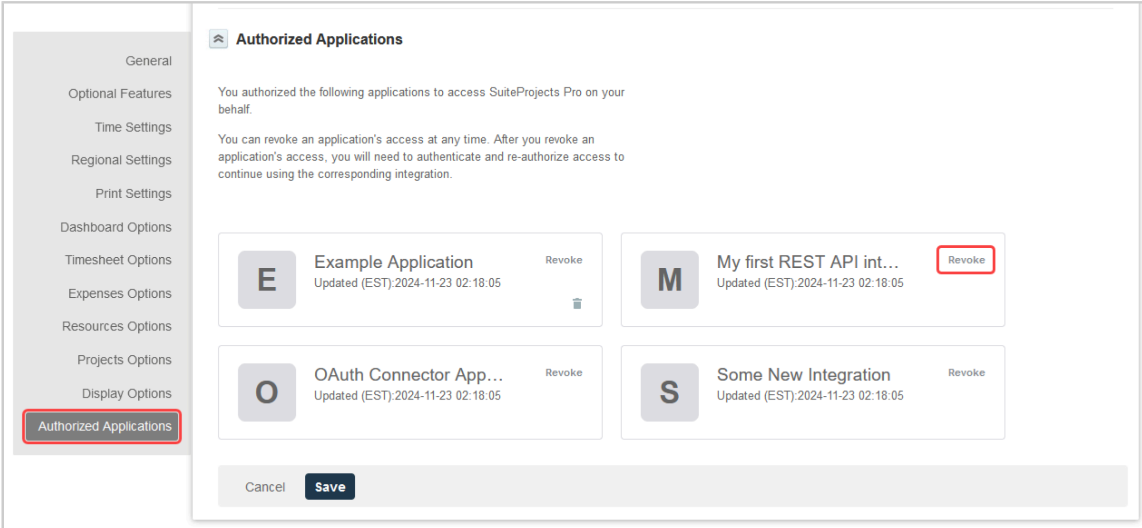
> **Note:** Integration applications are registered and managed by your account administrator. They need to be enabled on your company's SuiteProjects Pro account before they can attempt to connect to SuiteProjects Pro and request your permission.
>
> Account administrators can disable an application at any time.
>
> - If you have authorized an application and this application is disabled by an administrator, the application will no longer be able to interact with SuiteProjects Pro.
> - If an administrator enables this application again, you will need to give this application your explicit permission again before you can continue to work with it in connection with SuiteProjects Pro.

After you authorize an application, it will be able to interact with SuiteProjects Pro on your behalf until you revoke the authorization.

To view the application you have authorized, go to User Menu > Personal Settings > Authorized Applications. All your authorized applications are listed in a grid. Details include the name of the application and the date and time when it was last updated.

> **Note:** All times are given as Eastern Standard Time (EST).

To revoke an application, click **REVOKE** in the top right corner of the corresponding box, then click **REVOKE** in the confirmation message. The application no longer shows in the authorized applications list. If a revoked application attempts to access SuiteProjects Pro on your behalf, you will be prompted to give this application your explicit permission again.

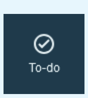
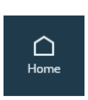
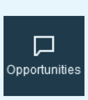

General
Optional Features
Time Settings
Regional Settings
Print Settings
Dashboard Options
Timesheet Options
Expenses Options
Resources Options
Projects Options
Display Options
Authorized Applications
Authorized Applications
You authorized the following applications to access SuiteProjects Pro on your behalf.
You can revoke an application's access at any time. After you revoke an application's access, you will need to authenticate and re-authorize access to continue using the corresponding integration.
E
Example Application
Updated (EST):2024-11-23 02:18:05
Revoke
M
My first REST API int…
Updated (EST):2024-11-23 02:18:05
Revoke
O
OAuth Connector App…
Updated (EST):2024-11-23 02:18:05
Revoke
S
Some New Integration
Updated (EST):2024-11-23 02:18:05
Revoke
Cancel
Save

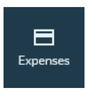
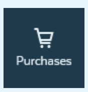
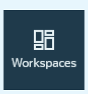
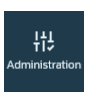
References

This section describes the icons used in the user interface.

- Global Icons
- List Icons
- Record Icons

Global Icons

Icon	Description
	Global search. See Getting Started with Global Search.
	User avatar (initials or profile picture). Open the user menu. See User Menu.
	View or add navigation shortcuts. See Shortcuts.
	Access contextual tips for the page. See Contextual Tips.
	Resource comparison utility button. See Resource Comparison.
	View highlights for the latest release. See Product Updates.
	Create new content. See Create Button.
	View a summary of workflow tasks and other items that require action from you. See To-do list.
	Home Application
	Opportunities Application

Icon	Description
	Projects Application
	Resources Application
	Invoices Application
	Timesheets Application
	Expenses Application
	Purchases Application
	Reports Application
	Workspaces Application
	Administration Application

List Icons

Icon	Description
	Open Column options panel
	Sort order disabled — Click to open Order by panel
	Sort order enabled — Click to open Order by panel
	Filters disabled — Click to open Advanced filters panel
	Filters enabled — Click to open Advanced filters panel

Icon	Description
	Open Download data options page
	Open More list options panel
	Remove
	Sort ascending
	Sort descending
	First sort level (ascending in this case) — Click to clear sort order
	Second sort level (ascending in this case) — Click to clear sort order
	Third sort level (ascending in this case) — Click to clear sort order
	Add criterion row
	Remove criterion row
	Lock column
	Column locked — Click to unlock column
	Column tips and Cell tips — Click to view the contextual tips relevant to the column or for the record.
	Resize column
	Row selected — Click to remove row from selection
	Rows selected — Click to clear row selection
	Go to the first page
	Show the previous 12–week period (date navigation)
	Go to the previous page (page navigation), Show the previous week (date navigation)
	Go to the next page (page navigation), Show the next week (date navigation)
	Show the next 12–week period (date navigation)
	Go to the last page
	Mark as a favorite
	Marked as a favorite — Click to remove from favorites
	Open the record form to edit the record
	Display a non-editable view of the record
	Duplicate the record
	Delete the record
	Add a new record

Icon	Description
	Add a new booking
	Expand node
	Collapse node
	View the document
	Replace the document
	Place the report in a folder or remove it from its current folder.
	Publish the report to the Business Intelligence Connector. See the help topic Publishing Reports.
	Run the report.
	Run or publish the report automatically according to a specific schedule.
	Share the report with other employees.

Record Icons

Icon	Description
	Go to the list for this type of records
	Display Project Status News Feed
	Display the reports associated with this record
	Display the Workspace associated with this record