



ORACLE  
NETSUITE

# Employee Management

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# Employee Management

NetSuite provides you with the tools that you need to manage your employees. You can:

- Add employee records to NetSuite. For more information, see [Employee Information Management](#).
- Give employees access to NetSuite. For more information, see [Giving an Employee Access to NetSuite](#).
- Log employee expenses and purchase requests. For more information, see [Expense Reports and Purchase Requests](#).
- Track employees' time with the Time Tracking feature. For more information, see [Managing Time Tracking](#).

NetSuite also offers SuitePeople, a comprehensive and integrated Human Capital Management (HCM) solution. SuitePeople enables Human Resources professionals to manage employees within NetSuite, thus eliminating repetitive and manual processes with one source of where employee data is kept.

For more information, see [SuitePeople Overview](#). For more information about SuitePeople, contact your NetSuite account manager.

- [SuitePeople Overview](#)
- [Effective Dating for Employee Information](#)
- [Employee Change Requests](#)
- [Employee Directory and Org Browser](#)
- [Employee Center Management](#)
- [Employee Onboarding and Offboarding Plans](#)
- [Employee Offboarding](#)
- [Time-Off Management](#)
- [Performance Management](#)
- [Compensation Tracking](#)
- [Job Management](#)
- [Advanced Employee Permissions](#)
- [Time Tracking](#)
- [Analytics and Reporting](#)
- [Compliance](#)
- [SuitePeople U.K. Localization](#)

# SuitePeople Overview

SuitePeople is a comprehensive and integrated Human Capital Management (HCM) solution. SuitePeople eliminates repetitive and manual processes by providing one source for employee data. This enables Human Resources (HR) and Payroll professionals to efficiently manage employees within NetSuite.

SuitePeople consists of two main modules:

- SuitePeople HR, which empowers employees and managers with self-service functionality to complete most everyday tasks. SuitePeople HR leverages NetSuite to provide customizable workflows tailored for how you do business. This module includes:
  - [Goal Management and Performance Reviews](#) – Manage goals and performance reviews with the Performance Management feature. Employees create and track their own goals, in collaboration with their managers. You can set up and launch performance reviews for individual employees or for groups of employees.



**Note:** The Performance Management feature requires SuitePeople HR but is not included in SuitePeople HR by default. To learn more, contact your NetSuite account manager.

- [Time-Off Management](#) – Create and manage time-off plans, and assign them to employees. Employees can request time off and view the status of their requests in the Employee Center. Managers can review and approve time-off requests either from an email message or from the Employee Center.
- [Effective Dating for Employee Information](#) – Edit the employee record as of a certain date, whether in the past, present, or future.
- [Employee Change Requests](#) - Manage change approvals for the employee record.
- [Job Management](#) – Track different job types within your organization.
- [Kudos](#) - Recognize the achievements of your coworkers.
- [Employee Directory and Org Browser](#) – Browse your organization's structure, and search for employees by using filters for location, department, and other parameters.
- [Employee Center Dashboard Publishing Feature](#) - Create a standard Employee Center dashboard for your organization. You can create/ a dashboard specifically designed for supervisors and managers.
- [Working With News Items](#)- Create and share company news with your employees. News items appear on the Company News portlet in the Employee Center.
- [Compensation Tracking](#)- Track base pay and bonus information on the employee record, and, if applicable, integrate compensation with SuitePeople U.S. Payroll.
- [Advanced Employee Permissions](#) - Use employee permissions for more control over which fields and sublists on the employee record are available to NetSuite roles.
- [Workforce Analytics](#) - Measure and analyze headcount and turnover trends in your company.
- [Employee Reports and Workbooks](#) - Use reports to keep you up to date with time-off balances, payroll, employee change history, and more.
- [Employee Onboarding and Offboarding Plans](#) – Manage the onboarding and offboarding process for various employees by using plans, templates, reminders, and email notifications.
- [Employee Offboarding](#) - Manage the offboarding of employees, including the creation of custom termination reasons.
- [Employee Timeline](#) - View an employee's key career milestones and career changes in chronological order.

- [Compliance](#) - Ensure that your organization is compliant with government and industry requirements.
- [SuitePeople U.K. Localization](#) - Helps HR professionals monitor information required by U.K. employee reporting regulations by using custom forms, fields, and saved searches.
- SuitePeople U.S. Payroll, which is a full-service payroll solution that is fully integrated with SuitePeople HR and Accounting modules. For more information, see .

For more information about SuitePeople HR or SuitePeople U.S. Payroll, contact your NetSuite account manager.

## SuitePeople Permission Requirements

**i Note:** If you want more control over what employee information is accessible by different NetSuite users you can use the Advanced Employee Permissions feature. You can use the employee permissions that come with this feature to give you more control over what employee information certain roles can access. You can also customize employee permissions to include all or set of standard fields and sublists from the employee record. For more information, see [Advanced Employee Permissions](#).

The following section contains information about the permission requirements you need for various SuitePeople features.

NetSuite includes four different types of permissions. They are Lists, Reports, Setup, and Transactions. Generally, permissions have four possible access levels, which are View, Create, Edit, and Full.

You can control what a role can do based on the level of access you set for a permission. In general, each successive level (view, create, edit, full) of a permission provides increased usage of the related record type, task, or page. However, the usage of some permissions does not fit exactly into this model. Generally, any user with at least View access to a record type has the ability to print records of that type. For some permissions, not all access levels are supported. All SuitePeople features require some level of employee access to view employee information. For more information, see the help topic [Permissions Documentation](#).

- [Advanced and Basic Government-Issued ID Tracking Permission Requirements](#)
- [Compensation Tracking Permission Requirements](#)
- [Effective Dating Permission Requirements](#)
- [Employee Center Publishing Permission Requirements](#)
- [Employee Change Requests Permission Requirements](#)
- [Job Management and Job Requisitions Permission Requirements](#)
- [Kudos Permission Requirements](#)
- [News Items Permission Requirements](#)
- [Performance Management Permission Requirements](#)
- [Termination Reason Tracking Permission Requirements](#)
- [Time-Off Management Permission Requirements](#)
- [Workforce Analytics Permission Requirements](#)

### Advanced and Basic Government-Issued ID Tracking Permission Requirements

You can enable the Basic Government-Issued ID Tracking feature to grant roles the Basic Government-Issued ID permission. Alternatively, you can enable the Advanced Government-Issued ID Tracking feature

to grant roles the Advanced Government-Issued ID permission. These permissions are located on the Lists subtab of the Role page. For a list of the standard roles assigned to this permission, see the help topic [Standard Roles Permissions Table](#). You can create custom roles that include this permission. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

If you enable the Basic Government-Issued ID Tracking feature, note the following. You must assign the Basic Government-Issued ID Tracking permission at the Full access level to roles who track employees' passport numbers and driver's licenses. Passport numbers and driver's licenses are masked from roles that do not have the Basic Government-Issued ID Tracking permission at the Full access level.

If you enable the Advanced Government-Issued ID feature, note the following. You must assign the Advanced Government-Issued ID permission to roles who track a variety of government-issued identifications for your employees. You can assign the Advanced Government-Issued ID permission at the View, Create, Edit, or Full access levels.

If users need to add or edit government-issued IDs on the employee record, assign the Government-Issued ID Types permission at access level Create or Edit.

The following table lists the permission level a user must have to perform certain tasks related to the Advanced Government-Issued ID Tracking features.

Permission	Subtab	Permission Access Level	Supported Functionality
Advanced Government-Issued IDs	Permissions > Lists	View	Allows users to view and search for employee government-issued ID information. Users cannot create, edit, or delete government-issued ID information.
		Create	Allows users to create driver's license, passport and other IDs through entry forms. Users cannot edit or delete government-issued IDs.
		Edit	Allows users to create, view, and edit government-issued IDs. Users cannot delete government-issued IDs.
		Full	Allows users to create, view, edit, and delete government issued-IDs.
Government-Issued ID Types   <b>Note:</b> IDs are always masked unless the Full access level is used.	Permissions > Lists	View	Allows users to view and search for government-issued ID types. Users cannot create, edit, or delete government-issued ID types.
		Create	Allows users to create and view government-issued ID types for employees. Users cannot edit or delete government-issued ID types.
		Edit	Allows users to create, view, and edit government-issued ID types. Users cannot delete government-issued ID types.
		Full	Allows users to create, view, edit, and delete government-issued ID types.

For more information about these features, see [Government-Issued ID Tracking](#).

## Compensation Tracking Permission Requirements

If you use the Compensation Tracking feature, any standard roles that have the Employees permission can access base pay and bonus target information. To access information on the bonus record, roles require the Bonus permission. To access bonus types, roles require the Bonus Type permission. These permissions are located on the Lists subtab of the Role page. For a list of the standard roles assigned to these permissions, see the help topic [Standard Roles Permissions Table](#). To create custom roles that include these permissions, see the help topic [Customizing or Creating NetSuite Roles](#).

For more information about the Compensation Tracking feature, see [Compensation Tracking](#).

The following table lists the permission level a user must have to perform certain tasks related to compensation tracking.

Permission	Subtab	Permission Access Level	Supported Functionality
Employees	Permissions > Lists	View	Allows users to view and search for base pay and bonus target information on the employee record.
		Create	Allows users to create and view base pay and bonus target information on the employee record.
		Edit	Allows users to create, view, and edit base pay and bonus target information on the employee record.
		Full	Allows users to create, view, and edit base pay and bonus target information on the employee record. Users can also delete the employee record.
Bonus Type	Permissions > Lists	View	Allows users to view and search for bonus type records.
		Create	Allows user to view, search for, and create bonus type records.
		Edit	Allows users to view, search for, edit, and create bonus type records. Users can also deactivate bonus type records, if the records have not been assigned to a bonus.
		Full	Allows users to view, search for, edit, and create bonus type records. Users can also deactivate or delete bonus type records.
Bonus	Permissions > Lists	View	Allows users to view and search for a list of awarded bonuses on the employee record. Users can also see the Award Bonus button.
		Create	Allows users to view and search for a list of awarded bonuses on the employee record. Users can award bonuses using the Award Bonus form.
		Edit	Allows users to view and search for a list of awarded bonuses on the employee record. Users can award bonuses using the Award Bonus form, and, if bonuses are not paid using SuitePeople U.S. Payroll, users can edit bonuses.
		Full	Allows users to view and search for a list of awarded bonuses on the employee record. Users can award bonuses using the Award Bonus form. If bonuses are not paid using SuitePeople U.S. Payroll, users can edit bonuses. Users can also delete bonuses. If bonuses are paid using SuitePeople

Permission	Subtab	Permission Access Level	Supported Functionality
			U.S. Payroll, users can delete only bonuses that are not included on a payroll batch.

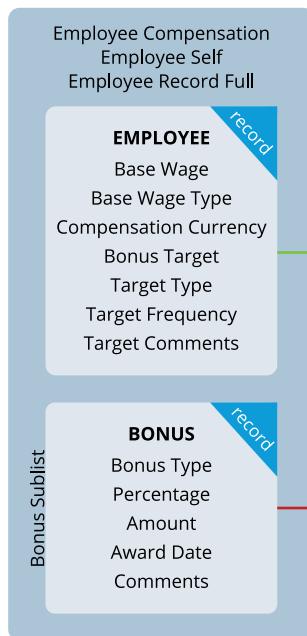
## Advanced Employee Permissions and Bonuses

With the Advanced Employee Permissions feature, you can apply additional restrictions to fields on the employee record. For more information, see [Advanced Employee Permissions](#). However, you cannot use the Advanced Employee Permissions feature to control access to fields on the bonus record. Access to bonus record fields is determined by your role, and specifically by the employee restrictions defined on a role. For more information about employee restrictions, see the help topics [Customizing or Creating NetSuite Roles](#) and [Setting Employee Restrictions](#).

The Advanced Employee Permissions feature includes a permission called Employee Compensation. This permission provides access to:

- Compensation fields on the employee record
- The Bonus sublist

The following image illustrates the fields that the Employee Compensation permission provides access to. It also shows the fields that the Advanced Employee Permissions feature can restrict.



**Important:** The ability to create or edit bonuses is restricted to roles that include the bonus permission. You might want managers to be able to create bonuses for their direct reports. However, if managers can create bonuses for their direct reports, then managers can also create bonuses for themselves.

## Effective Dating Permission Requirements

If you use the Effective Dating feature, the Employee Effective Dating permission must be assigned to roles to use the feature. If users need to add or edit the change reasons record, the Employee Change

Reason permission should be assigned at access level Create or Edit. The Employee Effective Dating permission also gives users access to the employee timeline. For more information, see [Viewing an Employee's Timeline](#). These permissions are located on the Lists subtab of the Role page.

For a list of the standard roles assigned to these permissions, see the help topic [Standard Roles Permissions Table](#). You can create custom roles that include this permission. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

The following table lists the permission level a user must have to perform certain tasks related to effective dating.

Permission	Subtab	Permission Access Level	Supported Functionality
Employee Effective Dating (Access levels Create and Full are not supported)	Permissions > Lists	View	Allows users to view and search for effective dated changes. Users cannot create, edit, or delete effective dated changes.  Allows users to view the employee timeline from the employee record. For details, see the help topic <a href="#">Employee Timeline</a> .
		Edit	Allows users to create, view, and edit effective dated changes. Users cannot create or delete effective dated changes.
Employee Change Reason Permission	Permissions > Lists	View	Allows users to view and search change reasons records. Users cannot create, edit, or delete change reason records.
		Create	Allows users to create and view change reasons records. Users cannot edit or delete change reason records.
		Edit	Allows users to create, view, and edit change reasons records. Users cannot delete change reason records.
		Full	Allows users to create, view, edit, and delete change reasons records.

For more information about this feature, see [Effective Dating for Employee Information](#).

## Employee Center Publishing Permission Requirements

If you use the Employee Center Dashboard Publishing feature, note the following. You must assign the Employee Center Publishing global permission to any users who are responsible for publishing a standard Employee Center dashboard for your company. The permission is assigned to users on their employee record.

For more information about the Global Permissions feature, see the help topic [Using the Global Permissions Feature](#). For more information about the Employee Center Publishing feature, see [Employee Center Dashboard Publishing Feature](#).

## Employee Change Requests Permission Requirements



**Important:** This topic describes a feature that is currently available only in some customer accounts. For information on the availability of this feature for your account, please contact your NetSuite account manager.

If you use the Employee Change Requests feature, note the following. You must assign Employee Change Requests permissions to any users who are responsible for managing Employee Change Requests for your company. The Administrator, HR Generalist, and Chief People Officer roles are automatically assigned Full permission for Employee Change Requests and Employee Change Request Types. For a list of the standard roles assigned to these permissions, see the help topic [Standard Roles Permissions Table](#). You can create custom roles that include this permission. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).



**Note:** To create, view, approve, and decline Employee Change Requests in the Employee Center, note the following. You do not need to assign Employee Change Requests permissions to Employee Center roles. Instead, you must assign Advanced Employee Permissions to requesters and approvers in a custom Employee Center role. For more information, see [Advanced Employee Permissions for Employee Change Requests](#).

The following table lists the permission level a user must have to perform certain tasks related to Employee Change Requests.

Permission	Subtab	Permission Access Level	Supported Functionality
Employee Change Requests	Permission > Lists	View	Allows users to view employee change requests. Users cannot create, edit, or delete employee change requests.
		Create	Allows users to create and view employee change requests. Users cannot edit or delete employee change requests.
		Edit	Allows users to create, view, and edit employee change requests. Users cannot delete employee change requests.
		Full	Allows users to create, view, edit, and delete employee change requests.
Employee Change Request Types	Permission > Lists	View	Allows users to view employee change request types. Users cannot create, edit, or delete employee change request types.
		Create	Allows users to create and view employee change request types. Users cannot edit or delete employee change request types.
		Edit	Allows users to create, view, and edit employee change request types. Users cannot delete employee change request types.
		Full	Allows users to create, view, edit, and delete employee change request types.

For more information about this feature, see [Employee Change Requests](#).

## Job Management and Job Requisitions Permission Requirements

If you use either the Job Management or the Job Requisitions feature, note the following. The Job Management and Job Requisitions permissions must be assigned to roles to use these features. Additionally, if users need to assign jobs, the Employees permission should be assigned at access level Edit.

These permissions are located on the Lists subtab of the Role page. For a list of the standard roles assigned to these permissions, see the help topic [Standard Roles Permissions Table](#).

The following table lists the permission levels that a user must have to perform certain tasks related to these features.

Permission	Subtab	Permission Access Level	Supported Functionality
Employees	Permissions > Lists	Edit	Allows users to assign jobs on the employee record.
Job Management (Access level View is not supported)	Permissions > Lists	Create	Allow users to create and view job records. Users cannot edit or delete job records.
		Edit	Allows users to create, view, and edit job records. Users cannot delete job records.
		Full	Allows users to create, view, edit, and delete job records.
Job Requisitions (Access level View is not supported)	Permissions > Lists	Create	Allow users to create and view job requisition records. Users cannot edit or delete job requisition records.
		Edit	Allows users to create, view, and edit job requisition records. Users cannot delete job requisition records.
		Full	Allows users to create, view, edit, and delete job requisition records.

For more information about these features, see [Managing Jobs](#) and [Job Requisitions](#).

## Kudos Permission Requirements

If you use the Kudos feature, the Kudos permission needs to be assigned to roles to use this feature. Additionally, if users need to create or edit organization values, the Organization Values permission should be assigned at access level Create or Edit.

The Kudos and Organization Values permissions are located on the Lists tab of the Role page. For a list of the standard roles assigned to this permission, see the help topic [Standard Roles Permissions Table](#).

The following table lists the permission level a user must have to perform certain tasks related to these features.

Permission	Subtab	Permission Access Level	Supported Functionality
Kudos	Permissions > Lists	View	Allows users to receive and view Kudos. Users cannot create new, edit, or delete Kudos.

Permission	Subtab	Permission Access Level	Supported Functionality
		Create	Allows users to give Kudos. Users cannot edit or delete Kudos.
		Edit	Allows users to edit the Inactive field. Users cannot delete Kudos.
		Full	Allows users to edit the Inactive field and delete Kudos.
Organization Value	Permissions > Lists	View	Allows users to view company organizational values. Users cannot create, edit, or delete organizational values.
		Create	Allows users to create and view organizational values. Users cannot edit or delete organizational values.
		Edit	Allows users to create, view, and edit organizational values. Users cannot delete organizational values.
		Full	Allows users to create, view, edit, and delete organizational values.

## News Items Permission Requirements

If you use the Employee Center Dashboard Publishing feature, note the following. The News Items permission lets you create news items that appear on the Company News portlet of the Employee Center.

This permission is located on the Lists tab of the Role page. For a list of the standard roles assigned this permission, see the help topic [Standard Roles Permissions Table](#).

The following table lists the permission access level a user must have to perform certain tasks related to this feature.

Permission	Subtab	Permission Access Level	Supported Functionality
News Items	Permissions > Lists	View	Allows users to view and search for news items. Users cannot create, edit, or delete news items.
		Create	Allows users to view and create news items. Users cannot edit or delete new items.
		Edit	Allows users to create, view, and edit news items. Users cannot delete news items.
		Full	Allows users to create, view, edit, and delete news items.

## Performance Management Permission Requirements

If you use the Performance Management feature, any roles that have the Talent Administration permission can access goal and performance review information. With this permission you can:

- Create metrics for tracking employee performance
- View, deactivate, and delete employees' goals
- Create and manage performance review questions, rating scales, and templates
- Create, schedule, and approve performance reviews
- Edit, delete, and cancel performance reviews

The Talent Administration permission is located on the Lists subtab of the Role page. By default, the standard Human Resources Generalist, Administrator, and Chief People Officer (CPO) roles include the Talent Administration permission. For a list of standard roles and their permissions, see the help topic [Standard Roles Permissions Table](#). You can also create custom roles that include this permission. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

Permission	Permissions Subtab	Permission Access Level	Supported Functionality
Talent Administration	Lists	View	Allows you to view and search for goal and performance review information. You can view goals and performance reviews for employees. You can also view performance metrics, performance review questions, performance review rating scales, and performance review templates.
		Full	<p>You can create and edit only your own goals. You can approve and delete goals. You can create, edit, or delete the following with some limitations:</p> <ul style="list-style-type: none"> <li>■ performance metrics</li> <li>■ performance review questions</li> <li>■ performance review rating scales</li> <li>■ performance review templates</li> <li>■ performance reviews</li> <li>■ performance review schedules</li> </ul> <p>You can approve and cancel performance reviews.</p>

## Termination Reason Tracking Permission Requirements

If you use the Termination Reason Tracking feature, the Termination Reasons permission must be assigned to roles to use this feature.

This permission is located on the Lists tab of the Role page. For a list of the standard roles assigned to this permission, see the help topic [Standard Roles Permissions Table](#).

The following table lists the permission access level a user must have to perform certain tasks related to this feature.

Permission	Subtab	Permission Access Level	Supported Functionality
Termination Reasons	Permissions > Lists	View	Allows users to view and search for termination reasons. Users cannot create, edit, or delete termination reasons.
		Create	Allows users to view and create termination reasons. Users cannot edit or delete termination reasons.

Permission	Subtab	Permission Access Level	Supported Functionality
		Edit	Allows users to create, view, and edit termination reasons. Users cannot delete termination reasons.
		Full	Allows users to create, view, edit, and delete termination reasons.

For more information about this feature, see [Termination Reason Tracking](#).

## Time-Off Management Permission Requirements

If you use the Time-Off Management feature, note the following. The Time-Off Administration permission and the Documents and Files permission must be assigned to roles to use this feature. These permissions are located on the Lists subtab of the Role page. For a list of the standard roles assigned to these permissions, see the help topic [Standard Roles Permissions Table](#).

You can also create custom roles that include these permissions. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

The following table lists the permission level a user must have to perform certain tasks related to this feature.

 <b>Note:</b>	The Time-Off Tracking SuiteApp must be installed when you are using the Time-Off Management feature. The Time-Off Tracking SuiteApp enables users to request or approve time-off from the Employee Center.
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Permission	Subtab	Permission Access Level	Supported Functionality
Time-Off Administration	Permissions > Lists	View	Allows users to view and search for time-off plans, time-off types, and time-off rules. Users cannot create, edit, or delete time-off information.
		Create	Allows users to create time-off plans, time-off types, and time-off rules. Users cannot edit or delete time-off information.
		Edit	Allows users to create, view, and edit time-off plans, time-off types, and time-off rules. Also, users can change the time-off plan assigned on the employee record.  Users cannot delete time-off plans, time-off types, or time-off rules.
		Full	Allows users to create, view, edit, and delete time-off plans, time-off types, and time-off rules.
Documents and Files	Permissions > Lists	View	Allows users to view and search for files in File Cabinet. The Time-Off Tracking SuiteApp requires access to files that are stored in File Cabinet.
		Create	Allows users to view and create files in File Cabinet. The Time-Off Tracking SuiteApp requires access to files that are stored in File Cabinet.

Permission	Subtab	Permission Access Level	Supported Functionality
		Edit	Allows users to create, view, and edit files in File Cabinet. Users cannot delete files. The Time-Off Tracking SuiteApp requires access to files that are stored in File Cabinet.
		Full	Allows users to create, view, edit, and delete files in File Cabinet. The Time-Off Tracking SuiteApp requires access to files that are stored in File Cabinet.

For more information about this feature, see [Time-Off Management](#).

## Workforce Analytics Permission Requirements

If you use the Workforce Analytics feature, any standard roles that have the Workforce Analytics permission can use this feature. This permission is located on the Reports tab of the Role page. For a list of the standard roles assigned to this permission, see the help topic [Standard Roles Permissions Table](#). You can create custom roles that include this permission. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

The following table lists the permission level a user must have to perform certain tasks related to this feature.

Permission	Subtab	Permission Access Levels	Supported Functionality
Workforce Analytics (Access levels Create, Edit, and Full are not supported)	Permissions > Reports	View	Allows users to access and view the headcount and turnover trends under Reports > Employees/HR.
Employees	Permissions > Lists	View	Allows users to view and search for headcount, hire, and turnover trends in your company. Users cannot create, edit or delete information.
		Create	Allows users to create hire and termination details on the employee record. Users cannot edit or delete hire or termination details on the employee record.
		Edit	Allows users to create, view, and edit hire and termination details on the employee record. Users cannot delete hire and termination details on the employee record.
		Full	Allows users to create, view, edit, and delete hire and termination details on the employee record.

For more information about this feature, see [Workforce Analytics](#).

# Employee Information Management

- Adding an Employee
- Adding Employees by Importing a CSV File
- Editing Employee Records Using CSV Files
- Giving an Employee Access to NetSuite
- Assigning a Supervisor to an Employee
- Viewing and Editing an Employee Record with Effective Dating
- Rehiring a Terminated Employee
- Searching for Effective-Dated Changes to the Employee Record
- Viewing an Employee's Timeline
- Employee Locations
- Creating an Employee Template
- Working with Employee Social Security Numbers
- Printing Mailing Labels for Employees

## Adding an Employee

Employee records enable you to maintain information about your employees including contact details, payroll, human resources data, and access permissions.

You can also grant an employee login access to your NetSuite account by entering an email address, password, and assigning a role.

For more information about adding an employee, see the following topics:

- Entering Communication Information on the Employee Record
- Entering an Address for an Employee
- Entering Human Resources Information for an Employee

### To add an employee:

1. Go to Lists > Employees > Employees > New.
2. To use a custom form for the employee, select a form from the **Custom Form** list.
3. Enter the required information for the employee.



**Tip:** To understand more about the information that should go into each field, you can click the field label.

If you use NetSuite OneWorld, you must select a **Subsidiary** for the employee. The employee can access only information associated with this subsidiary. You can customize an employee's role to give the employee access to information outside of the subsidiary. For more information, see the help topic [Control Employee Access to Subsidiaries](#).

4. If necessary, enter information into the subtabs. You can always enter information at a later time.



**Note:** The available subtabs depend on the enabled features and any customizations to the employee record in your account.

- **Communication** – Add files and user notes to the employee record. For more information, see [Entering Communication Information on the Employee Record](#).
- **Address** – Add the employee's addresses. For more information, see [Entering an Address for an Employee](#).
- **Human Resources** – Add information specific to human resources, such as the employee's hire date, social security number, and expense and purchase details. For more information, see [Entering Human Resources Information for an Employee](#).
- **Time-Off** – If you use the Time-Off Management feature, assign a time-off plan to the employee and view the employee's time-off balances. For more information, see [Assigning a Time-Off Plan to an Employee](#) and [Viewing an Employee's Time-Off Balance](#).
- **Government-Issued ID** – If you use the Government-Issued ID feature, track a variety of government-issued identification information about the employee. In this subtab, you can track accurate documentation for the employee's travel, driving qualifications, and tax compliance. For more information, see [Government-Issued ID Tracking](#).
- **Affordable Care Act** – If you use the ACA SuiteApp, you can assign an offer of coverage plan. Then, you can add any covered individuals who are included in the plan, and apply a safe harbor code for the employee. For more information, see [Updating Employee Records for ACA](#).
- **ACH/Direct Deposit** – If you use SuitePeople U.S. Payroll, set up direct deposit banking information for the employee. For more information, see [Setting Up Direct Deposit for an Employee](#).
- **Time Tracking** – Set up a time approver for an employee. For more information, see the help topic [Managing Time Tracking](#).
- **Compensation Tracking** – Track the employee's base pay and bonuses. For more information, see [Compensation Tracking](#).
- **Payroll** – If you use SuitePeople U.S. Payroll to pay this employee, add the employee's payroll information. For more information, see the help topic [Payroll Setup for Employees](#).
- **Commission** – If you use the Commissions feature, indicate if the employee is eligible for commission and select the method of paying commission. For more information, see the help topic [Commission Preferences](#).
- **Access** – Grant the employee access to NetSuite. For more information, see [Giving an Employee Access to NetSuite](#).

5. Click **Save**.



**Tip:** If you're adding multiple employees, you may find it helpful to create employee templates. For more information, see [Creating an Employee Template](#).

## Entering Communication Information on the Employee Record

Communication information includes files and notes that you want to maintain for an employee.

### To enter communication information on the employee record:

1. Go to Lists > Employees > Employees.

2. Beside an employee, click **Edit**.
3. Click the **Communication** subtab.
4. To attach a file to the employee record, click the **Files** subtab, and then do one of the following:
  - To attach a file from the File Cabinet, from the **Attach Existing Files** list, click **List**. Select a file to attach.
  - To attach a new file, click **New File**. For more information, see the help topic [Uploading Files to the File Cabinet](#).
5. To enter notes about the employee or about the record, click the **User Notes** subtab, and then click **New Note**.



**Important:** Because a contact record is created for each employee, these notes also appear on the corresponding contact record. You can prevent specific user roles from viewing notes on contact records that refer to the employee record. The role must have **Self Only** or **Self and Subordinates Only** selected in the **Employee Restrictions** field. Go to Setup > Users/Roles > Manage Roles to set this field.

6. When you are finished, click **Save**.

## Entering an Address for an Employee

On the **Address** subtab of the employee record, you can enter multiple addresses for an employee. The address might be mandatory.

If you use SuitePeople U.S. Payroll, the home address you enter for an employee is used to calculate state and local taxes.

### To enter an address for an employee:

1. Go to Lists > Employees > Employees.
2. Beside an employee name, click **Edit**.
3. On the employee record, click the **Address** subtab.
4. To indicate that this address is the default shipping address for the employee, check the **Default Shipping** box.
5. To indicate that this address is the employee's home address, check the **Home** box. If the employee has only one address, this box is checked by default. If you add other addresses for this employee, you can clear the Home box and check the box beside the home address.



**Note:** Make sure that the **Home** box is checked for one address. The address that is marked as the home address can be used in customized employee reports.

6. In the **Label** field, enter a descriptive title to appear for this address in lists.  
For example, you could enter a label of **Home** or **Mailing Address**.
7. To add or edit values for other address fields, click the pencil icon in the **Edit** column.  
An address popup displays address fields.



**Note:** The following steps list the address fields included in the default address form. The address form for each employee may vary according to the country where the employee is located. Variance also depends on the custom address forms defined in your account. For more information, see the help topic [Customizing Address Forms](#).

- a. Ensure the value for **Country** is correct.



**Note:** If you use SuitePeople U.S. Payroll to pay your employees, you can pay only employees who reside in the United States.

- b. In the **Attention** field, enter the person at this address who should be notified of receipt of documents or goods.

The value you enter autofills on forms if this address is marked as default for **Shipping** or **Billing**.

- c. In the **Addressee** field, enter the company name that should show on the shipping label. This name appears under the name entered in the **Attention** field.
- d. Enter a phone number for your employee. This number appears on the Employee List report.
- e. Enter the employee's street address. If you enter the zip code first, city and state populate automatically.
- f. By default, the information entered for the employee's address appears in read-only format in the **Address** free-form text box. The information sources from the **Attention**, **Addressee**, **Address 1**, **Address 2**, **City**, **State**, **Zip**, and **Country** fields.



**Note:** To edit the read-only text, check the **Override** box.

- g. Click **OK**.
8. To enter additional addresses, click **Add**.
9. Repeat steps 4-7 for each additional address.
10. Click **Save**.

## Entering Human Resources Information for an Employee

On the Human Resources subtab of the employee record, you can enter an employee's social security number, supervisor, hire date, and other information.

### To enter Human Resources information for an employee:

1. Go to Lists > Employees > Employees.
2. Click **Edit** beside the employee's name.
3. Click the **Human Resources** subtab.
4. In the **Social Security** field, enter the employee's social security number. For information regarding social security number masking and encrypting, see [Working with Employee Social Security Numbers](#).
5. Enter this employee's birth date.

### To enter job information for an employee:

1. From the **Type** list, select the type category that applies to this employee. For more information, see the help topic [Setting Up Employee Related Lists](#).

The type determines whether the employee data is included in employee-related key performance indicators.

To create new **Types**, go to Setup > Accounting > Employee Related Lists > New.

2. Select the status of this employee's employment with your company.

To create new selections for this field, go to Setup > Accounting > Employee Related Lists > New. For more information, see the help topic [Setting Up Employee Related Lists](#).

3. Enter a job description for this employee.



**Note:** If you use the Effective Dating feature and are assigned to a role with the Employee Effective Dating permission, note the following. You can see historical changes to an employee's status and type on the employee timeline. For more information, see [Viewing an Employee's Timeline](#).

### To enter job information for sales reps:

1. For sales reps, choose one of the following:
  - If you do not use Team Selling, check the **Sales Rep** box to assign sales territories to the employee. You can also select them in the **Sales Rep** field on customer records and sales transactions.
  - If you use Team Selling, and if the employee is a part of the sales team, select a field in **Sales Role**. For more information, see the help topic [Team Selling](#).

When the **Sales Rep** box is checked or a **Sales Role** is selected for an employee, NetSuite creates a customer record. The employee is selected as the default sales rep on the customer record.
2. To assign cases or territories to the employee, check the **Support Rep** box.
3. To assign the employee to manage projects and project tasks, check the **Project Resource** box.  
If the employee is a project resource, and you want to designate a project manager to an employee, check the **Project Manager** field.  
If the employee is a project resource, select a role in the **Default Projects Resource Role** field.  
When the employee is assigned to a project, the selected role is automatically assigned.  
When an employee is marked as a Project Resource, the **Target Utilization** field is available.
4. Select a work calendar for the employee.
5. In the **Labor Cost** field, enter the hourly overhead labor cost rate for this employee to calculate project costs and profitability.
6. In the **Hire Date** field, enter the date the employee was hired.
7. In the **Last Review Date** field, enter the date of the employee's last review.
8. In the **Next Review Date** field, enter the date of the employee's next review.
9. In the **Termination/Release Date** field, enter the person's last date of employment.

### Supervisor Change Hist.

1. This subtab shows system notes about changes to the employee's supervisor. For more information, see [Assigning a Supervisor to an Employee](#).

### Work Status

1. Select the Employee's resident status.

This information is located in Section 1 of the employee's completed I-9 form.

To create new selections for this field, go to Setup > Accounting > Employee Related Lists > New.

2. Select the employee's **Visa Type**.

To create new selections for this field, go to Setup > Accounting > Employee Related Lists > New.

3. Enter the Visa's expiration date.
4. Enter the **Alien Number**.

This information is located in Section 1 of the employee's completed I-9 form.

This step is required only if the employee's work status is **Alien authorized to work**.

5. Enter the date through which the employee is authorized to work.

This information is located in Section 1 of the employee's completed I-9 form.

This step is required only if the employee's work status is **Alien authorized to work**.

6. On the **Work Status** subtab, check **I-9 Verified** if the employee has completed an I-9 form.

### To enter expense and purchasing information:

1. In the **Expense Limit** field, enter the amount the employee can expense without approval.  
This field defaults to \$0, which requires all expenses to be approved.
2. In the **Expense Approver** field, select the person that approves the employee's expense reports.  
If no approver is selected, the supervisor approves expense reports. If a supervisor and an expense approver are selected, either can approve expense reports. For more information on approvers and approval limits, see the help topic [Approval Routing](#).
3. In the **Expense Approval Limit** field, enter the maximum amount an employee is allowed to approve on an expense report when specified as an approver.
4. In the **Purchase Limit** field, enter the amount the employee can purchase without approval.  
This field defaults to \$0, which requires all purchases to be approved.
5. In the **Purchase Approver** field, select the person that approves the employee's purchase requests.  
If no approver is selected, the supervisor approves purchase requests. If both a supervisor and a purchase approver are selected, either can approve the purchase request.
6. In the **Purchase Approval Limit** field, enter the maximum amount an employee can approve on a purchase request when specified as an approver.
7. In the **Account** field, enter this employee's account number if needed.

### To enter personal information for an employee:

1. Select the employee's marital status.

To create new selections for this field, go to Setup > Accounting > Employee Related Lists > New.

2. Select the employee's ethnicity.

To create new selections for this field, go to Setup > Accounting > Employee Related Lists > New.

3. On the **Personal** subtab, select the employee's gender.

4. Use the following information to enter or verify information on the additional subtabs on the **Human Resources** subtab.

After you have entered all necessary information, click **Save**.

### To enter emergency contacts for an employee:

1. Enter the name of the employee's emergency contact.

2. Enter the relationship between the contact and employee.
3. Enter the address of the emergency contact.
4. Enter the phone number for the emergency contact.
5. Click **Add/Edit**.

### To enter education information:

1. On the **Education** subtab, select the employee's level of education. To create new selections for this field, go to Setup > Accounting > Employee Related Lists > New.
2. Enter the **Degree** received.
3. Enter the date the degree was conferred.
4. Click **Add/Edit**.

## Adding Employees by Importing a CSV File

You can add multiple employee records at once by uploading employee data in a CSV file. The CSV file must include the following information for each employee record:

- **Hire Date**
- **Work Calendar**
- **Employee ID**

**Note:** You only need to provide the Employee ID if your organization has not checked the **Auto** box on the employee record entry form.

For One World Accounts, you must also include the following information for each employee record:

- **Subsidiary**
- **First Name**
- **Middle Name**
- **Last Name**

You can also include information for optional employee record fields in your CSV file.

You should organize employee information in your CSV file by using employee record field names as your CSV column headers.

A	B	C	D	E	F	G	H	I	J	K	L
1	Hire Date	Work Calendar	Subsidiary	First Name	Last Name						
2	04/01/2019	US Work Calendar	Parent Company	Samantha	Smith						
3	04/01/2019	US Work Calendar	Parent Company	James	Brook						
4	04/01/2019	US Work Calendar	Parent Company	Mark	Black						
5	04/01/2019	US Work Calendar	Parent Company	Melissa	Roberts						
6	04/01/2019	US Work Calendar	Parent Company	Joyce	Rowling						
7											

## To add employees by importing a CSV file:

1. Go to Setup > Import/Export > Import CSV Records.
2. In the **Import Type** list, select Employees.
3. In the **Record Type** list, select Employees.
4. In the CSV file(s), choose **One File to Upload**.
5. Click **Select...** and then select the file you want to upload.
6. Click **Next**.
7. In the **Data Handling** subtab, select **Add**.
8. Click **Next**.
9. Click the **Advanced Options** subtab and then check the **Run Server SuiteScript and Trigger Workflows** box.
10. Click **Next**.
11. On the Field Mapping page, verify that your CSV file's column headers have been matched to the correct employee record fields.
12. Click **Next**.
13. Enter a unique name for your CSV file's field mapping in the **Import Map Name** field.
14. Click **Save and Run**.

You can check the status of your CSV import from the Job Status page by clicking the **Import Job Status** link.

## Editing Employee Records Using CSV Files

You can edit multiple existing employee records at one time by exporting employee records to a CSV file. Edit the CSV file and then import the CSV file. You can also include information for additional employee record fields in your CSV file.

You should organize employee information in your CSV file by using employee record field names as your CSV column headers.

## To edit employee records using CSV files:

1. Go to Lists > Employees > Employees.
2. Click the CSV export icon.
3. Open the CSV file and edit the employee records you want to change. Then, save the file.
4. Go to Setup > Import/Export > Import CSV Records.
5. In the **Import Type** list, select Employees.
6. In the **Record Type** list, select Employees.
7. In the CSV file(s), choose **One File to Upload**.
8. Click **Select...** and then select the CSV file you edited.
9. Click **Next**.
10. In the **Data Handling** subtab, select **Add or Update**.
11. Click **Next**.

12. Click the **Advanced Options** subtab and then check the **Run Server SuiteScript and Trigger Workflows** box.
13. Click **Next**.
14. On the Field Mapping page, verify that your CSV file's column headers have been matched to the correct employee record fields.
15. Click **Next**.
16. Enter a unique name for your CSV file's field mapping in the **Import Map Name** field.
17. Click **Save and Run**.

## Giving an Employee Access to NetSuite

To give an employee access to your NetSuite account, you must ensure the employee record includes an email address. The email address serves as the user ID. Then, complete the necessary information on the Access subtab of the employee record. This setup includes the following:

- Enabling the Give Access option
- Assigning roles and/or permissions

**Note:** If you use the Effective Dating feature, the **Give Access** box and the **Email** address field on the employee record are not effective-dated. If you grant access to an employee or change the employee's email address, as part of an effective-dated change, those two changes are immediate.

**Note:** If you use the Advanced Employee Permissions feature, the Employee Access permission must be assigned to a role. This assignment lets the role give access and assign roles to employees. For more information, see [Employee Access Tab Permission Overview](#).

To secure the user login process:

- Two-factor authentication is the preferred alternative to restricting access by IP Address. For more information, see the help topic [Two-Factor Authentication \(2FA\)](#).
- If you use the IP Address Rules feature, you can set up IP address restrictions to limit where employees can log in to NetSuite. For information about setting IP address rules, see the help topic [Enabling and Creating IP Address Rules](#).

**Note:** Only active users with access count against the Full User Count purchased for your account. Inactive users that have access do not count. For information about making users inactive, see [Inactivating Employee Records](#).

Follow this procedure to let employees set up a NetSuite password themselves. If you prefer to assign passwords, see [Assign an Employee Password Manually](#).

### To give an existing employee access to NetSuite:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the name of the employee for whom you want to set up access.
3. Under Email | Phone | Address, enter the employee's email address.  
The email address is required for login.

4. Click the **Access** tab.
5. Check the **Give Access** box.
6. Check the **Send New Access Notification Email** box to inform the user how to access your NetSuite account. The standard user access notification includes the email address to use for logging in to NetSuite. It also contains a URL so that the user can set up a NetSuite password. The user must set up a NetSuite password within 24 hours or the URL will expire. If this occurs, edit the employee record, clear the **Give Access** box, click **Save**, and repeat steps 1–6.



**Important:** The email contains the URL only if the user does not have access to NetSuite. For example, it is a new user, or it is a user whose access was removed.

7. On the **Roles** subtab, assign one or more roles to this employee.

Each role includes a set of associated permissions that determine the data assigned users can see and the tasks they can perform. For more information, see [Assigning Roles to an Employee](#).

8. If you use the **Global Permissions** feature on the **Employees** subtab, note the following. A **Global Permissions** subtab is available on the employee record. Use this subtab to assign permissions. Go to Setup > Company > Enable Features to enable this feature. These permissions apply for all of the employee's assigned roles. For more information, see the help topic [Using the Global Permissions Feature](#).

9. Click **Save**.

## Assign an Employee Password Manually

Use the following procedure if you prefer to assign a user's password, rather than letting users assign their own password.

### To give an employee access to NetSuite and assign a password:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the name of the employee for whom you want to set up access.
3. Under Email | Phone | Address, enter the employee's email address.  
The email address is required for login.
4. Click the **Access** tab.
5. Check the **Give Access** box.
6. Do not check the **Send New Access Notification Email** box.
7. Check the **Manually Assign or Change Password** box.
8. Enter a password for the employee. As you type, the characters are validated against the password policy criteria, and the results displayed.



**Note:** For employees who can view unencrypted credit card numbers, note the following. The password must be at least 10 characters or the minimum length required for your account, whichever is greater. This is required to comply with Payment Card Industry (PCI) Data Security Standard. For more information, see the help topic [NetSuite Password Requirements](#).

9. In the **Confirm Password** field, re-enter the password.
10. Check the **Require Password Change on Next Login** box to require this employee to change their password on their next login to NetSuite.

When the employee next logs in, the **Change Password** page appears. The user cannot access other NetSuite pages until a new password is created and saved.

Requiring this action protects your account from unauthorized access using generic passwords and prepares your account for an audit.



**Important:** The **Require Password Change on Next Login** box never appears as checked. When you check this box and save the record, an internal flag is set. When the password change occurs, the flag is cleared. If you later check the box again and resave the record, the internal flag is reset to require another password change.

11. When you have finished entering information, click **Save**.
12. Next, tell your user the appropriate login page to go to, the email address to use for login, and the password you assigned. For security reasons, do not send the password by email.

For more information, see the help topic [Types of Login Pages for Your NetSuite Account](#).

## Assigning Roles to an Employee

You must assign one or more roles to each employee to whom you want to provide access to NetSuite. Each role is a set of associated permissions that determine the data assigned users can see and the tasks they can perform.

You assign roles to an employee on the Roles subtab of the Employee record's Access tab.



**Note:** If you have the Effective Dating feature enabled, the Role field is not effective-dated. If you change an employee's role settings, as part of an effective-dated change, this change is immediate.

- For general information about roles and NetSuite access, see the help topic [NetSuite Access Overview](#).
- NetSuite provides many standard roles with predefined permissions. To view a list of the standard roles and permissions, see the help topic [Standard Roles Permissions Table](#).
- You can customize the standard roles to fit the unique needs of your business. For information about how to customize a role, see the help topic [Customizing or Creating NetSuite Roles](#).
- If you use the Global Permissions feature, in addition to assigning roles to employees, you can assign permissions directly on each employee record. Please note that usage of the Global Permissions feature is not recommended. For more information, see the help topic [Using the Global Permissions Feature](#).
- You can restrict employee access to data by location. For information, see [Employee Locations](#).
- For information regarding employee roles and social security data, see [Working with Employee Social Security Numbers](#).

Employees can have multiple roles in your company.

### To assign one or more roles to an employee:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the name of the employee you want to assign a role to.
3. Under **Email | Phone | Address**, enter an email address in the **Email** field if one has not been entered already.
4. Click the **Access** subtab.

5. Complete the necessary access-related fields, if you have not already. For more information, see [Giving an Employee Access to NetSuite](#).
6. In the **Role** field, select a role for this employee.
7. Click **Add**.
8. Repeat steps 6-7 for any other roles you want to assign to this employee.
9. Click **Save**.

Your employee now has a role and can access your NetSuite account. When the employee logs in, the employee sees only the links that the role gives permission to see.

If you need to remove a role for an employee, open the record, click the name of the role on the **Access** tab. Click **Remove**, and then click **Save**.



**Note:** To see a list of all the users assigned to a particular role, go to Setup > Users/Roles > Manage Users. Select the role from the Role list. You can also run an employee search to find out which roles have been assigned to employees. For more information, see the help topic [Running Searches](#).

## Assigning a Supervisor to an Employee

In NetSuite, supervisors can approve the following for their supervised employees:

- Expense reports, if no expense approver is assigned
- Purchase orders, if no purchase approver is assigned
- Time-off requests, if the Time-Off Management feature is enabled

If you enable the Employee Change Requests feature, supervisors can create employee change requests for their supervised employees. For more information, see [Employee Change Requests](#).

For someone to be considered a supervisor in NetSuite, that person must be selected as the supervisor of another employee on that employee's record. The supervisor receives email when an employee enters a new time-off request, a new expense report, or a new purchase request that needs approval. For more information, see the help topics [Approving or Rejecting Time-Off Requests](#) and [Approval Routing](#).

### To assign or change supervisors on employee records:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the name of the person whose supervisor you want to assign or change.
3. Under Primary Information, in the **Supervisor** field, select the person who should be the supervisor of this employee.
4. When you have finished editing the employee's record, click **Save**.

## Supervisor Changes and Commissions

Supervisor changes can affect commissions for the supervisor, depending upon their commission schedule. For example, the effective date for a supervisor change is not the same as the date when the employee is updated. Therefore, the supervisor could be credited with less or more commissions than they should be. To avoid this, change the effective date for a supervisor change to a date in the future or in the past.



**Note:** A change to a supervisor effective date does not cause a commission recalculation, which may be necessary to correct the commission amount.

### To update a supervisor assignment:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the employee.
3. Under Primary Information, in the **Supervisor** field, select the supervisor's name.
4. Click **Save**.

### To update the supervisor change history for an employee:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the employee.
3. Under Primary Information, in the **Supervisor** field, confirm that the employee has the correct supervisor.
4. Click the **Human Resources** tab.
5. Click the **Supervisor Change Hist.** subtab.
6. On the row with the relevant supervisor change, click **Edit**. Enter the correct date in the Effective Date field. Note that you cannot enter effective dates of assignments that overlap. For example, an employee cannot report to two supervisors at the same time. Click **Save**. Click **Close**.
7. To save the employee record, click **Save**.



**Note:** This manual change to the supervisor change history does not use the SuitePeople Effective Dating feature.

## Viewing and Editing an Employee Record with Effective Dating

The Effective Dating feature enables you to make changes to the employee record that are back-dated or future-dated to a specific date. These changes represent when a particular piece of information became effective or true, regardless of when you made the change. To use the Effective Dating feature, you must be logged into NetSuite using a role that has the Employee Effective Dating permission. By default, this permission is automatically assigned to the standard Administrator, Chief People Officer (CPO), and HR Generalist roles. This permission also gives you access to the employee timeline from the employee record. For more information, see [Viewing an Employee's Timeline](#).

Many fields on the employee record are supported by effective dating, but others are not. When you view an employee record, fields that are not supported are labeled Not Effective-Dated. For more information, see [Effective Dating for Employee Information](#).

### Using Effective Dating with the Employee Record

## Viewing an Employee's Record as of a Date

If you are using the Effective Dating feature, you can view many of the fields on an employee's record as of a specified date.

## To view an employee record as of a date:

1. Go to List > Employees > Employees.
2. Click **View** next to the name of the appropriate employee.
3. On the employee record page, from the **Actions** list, select **View As Of Date**.
4. In the Select Effective Date Information window, enter or select a date and click **OK**.

The employee record page is refreshed showing the Viewing As Of banner to indicate that you are viewing an effective-dated view of the employee record. Note that the fields that are not effective-dated are labeled.



**Note:** You can also click the **Effective Date Log** subtab to view all effective-dated changes made to the employee's record. Use the **Field** and **Change Reason** filters to find specific changes.



**Note:** If you use CSV import or the Mass Updates functionality to edit multiple employee records, note the following. The changes affect the current day version of the employee records. You cannot use these features to make past-dated or future-dated changes to employee records. For more information, see the help topics [Employees Import Type](#) and [Mass Changes or Updates](#).

## Editing an Employee's Record as of a Date

If you are using the Effective Dating feature, you can edit many of the fields on an employee's record as of a specified date. This allows you to back-date a change to employee information and specify when a particular piece of information was valid or true.

## To edit an employee record as of a date:

1. Go to List > Employees > Employees.
2. Click **Edit** next to the name of the appropriate employee. You can also click **Edit** from a view of an employee record.
3. In the Select Effective Date Information window, enter or select the date as of which you would like to edit the employee record.
4. Select a change reason from the **Change Reason** list. Optionally, enter details of the change to further describe it. Click **OK**.

The employee record page appears showing the Editing As Of banner to indicate that you are editing an effective-dated view of the employee record. Note that the fields that are not effective-dated are labeled.

5. Make the required changes to the employee record.
6. Click **Save**. The changes you made will appear in the **Effective Date Log** subtab.

## Rehiring a Terminated Employee

You can rehire employees that have been previously terminated. If you use the Effective Dating feature, you can select a date in the past or the future for this change to occur. For more information, see [Effective Dating for Employee Information](#).



**Note:** You must be in the Administrator role to reactivate a terminated employee record.

### To rehire a terminated employee:

1. Go to Lists > Employees > Employees (Administrator).
2. Click **Edit** next to the name of the terminated employee.
3. If you are using the Effective Dating feature, in the Select Effective Dating Information window:
  - a. In the **Date** field, select the employee's hire date.
  - b. In the Change Reason, select a change reason. For example, Rehire or Employee Status Change.
  - c. Optionally, enter Change Reason Details.
  - d. Click **OK**.
4. Click the **Human Resources** subtab.
5. In the **Hire Date** field, enter the new hire date.
6. Clear the **Termination/Release Date** field.
7. Update the rest of the necessary fields on the employee record such as the Position, Department, Supervisor, and so on.
8. Click the **System Information** subtab.
9. Clear the **Inactive** box.
10. Click **Save**.

## Searching for Effective-Dated Changes to the Employee Record



**Important:** This feature requires SuitePeople HR. For more information, see [SuitePeople Overview](#).

After you use the Effective Dating feature to make back- or future-dated changes to employee information, note the following. You can use the NetSuite search features to determine when particular aspects of the employee record were true or valid. Use the Valid Date option on the Employee Change Search page to do this.

### Using Effective Dating with the Employee Record

#### To search for effective-dated changes to the employee record:

1. Go to Reports > New Search.
2. Click **Employee Change**.
3. On the Employee Change Search page, under **Valid Date**, specify the date or date range that you want to search.
4. Specify any other search parameters you want to include. For example, you can look for employees who have effective-dated changes with a particular change reason. To do this, select one or more reason from the **Change Reason** list.
5. Click **Submit**.

The Employee Change Search: Results page shows the results of your search.



**Note:** You can also search for effective-dated changes for a specific employee. Go to Lists > Employees > Employees, and then click **View** next to the name of the employee. Click the **Effective Date Log** subtab to view all effective-dated changes made to the employee's record. Use the **Field** and **Change Reason** filters to find specific changes.

## Viewing an Employee's Timeline

The employee timeline displays an employee's key milestones and career changes in chronological order. Information displayed on the employee timeline includes the employee name, hire date, and the termination date. The employee timeline also displays most effective-dated changes made to the employee record.

You can view additional information on the employee timeline based on your role. If you are a manager, you can view effective-dated changes on the timelines of any employees in your reporting chain without the Effective Dating permission. If you are not a manager, you can view effective-dated changes on the employee timeline only if you have the Effective Dating permission. Similarly, you can view information about an employee's bonuses in the employee timeline if you have the Bonus permission.

The employee timeline displays:

- employee status changes
- employee type changes
- changes in job title
- changes in compensation (type, currency, and base wage)
- the name of the person who modified the information
- awarded bonuses

You can view an employee's timeline from the employee record.

Watch the following video for information on the employee timeline:



[Introducing the Employee Timeline](#)

### To view an employee's timeline from the employee record:

1. Go to Lists > Employees > Employees.
2. Beside an employee, click **View**.
3. From the **Actions** list, select **View Timeline**.

Managers with Employee Center roles can also view their direct reports' employee timelines through the My Team portlet.

### To view an employee's timeline from the My Team portlet:

1. On the **Manager** tab, go to the My Team portlet.
2. Beside an employee, from the **Actions** list, select **View Timeline**.

## Employee Locations

This section contains the following topics:

- [Associating an Employee with a Location](#)
- [Restricting Employee Access by Location](#)

## Associating an Employee with a Location

You can associate employees with a specific location to ensure that employees have access to only the information associated with that location. For example, you can restrict access for warehouse personnel who handle item receipts or fulfillments at a single location. You can also refine employee reports and searches by location.

### To associate an employee with a location:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the employee to whom you want to assign a location.
3. Under Classification in the **Location** field, select the location of this employee.  
For more information, see the help topic [Creating Locations](#).
4. Click **Save**.

To search for employee records based on location, go to Lists > Employees > Search. In the **Location** field, choose the company location whose employee records you want to access, and click **Submit**. A list of employee records for that location appears.

## Restricting Employee Access by Location

Use the following procedure to restrict employee access by location.

### To restrict employee access by location:

1. Go to Setup > Users/Roles > User Management > Manage Roles.
2. Click **Customize** next to the role you would like to restrict.
3. Click the **Restrictions** subtab.
4. Click the blank line in the list and select **Location** from the **Segment** column.
5. From the **Restrictions** column, choose a level of access for the location field on transactions and records.
6. In the **Location Restrictions** field, choose a level of access for the location field on transactions and records.
  - **None - default to own** - There is no restriction on what can be selected. The default selection is the location set on the user's record.  
All transactions and records are accessible.
  - **Own, subordinate, and unassigned** - Users can select their own location, sublocations of their location, locations and sublocations of their subordinates. Users can also leave the **Location** field blank.  
Users can access only those transactions and records with one of these selections in the location field.
  - **Own and subordinates only** - Users can select only their location and sublocations of their location, or locations and sublocations of their subordinates.

Users can access only those transactions and records with their location or sublocations selected in the **Location** field.

7. Check the **Allow Viewing** box to allow users logged in with this role to see, but not edit, data. This applies to data for employees to which the role does not have access.



**Important:** This setting does not allow viewing of employee payroll or commissions data. Also, users cannot view non-subordinate employee records other than their own record when the **Restrictions** column is set to **own and subordinates only**.

8. Check the **Apply to Items** box to apply the department restrictions defined here to item records, in addition to transaction, employee, or partner records.
9. Click **Save**.

## Creating an Employee Template

You can create a template for employee records to speed up the process of adding employees to NetSuite.

On the template record, you can select default values for fields on the employee record. When creating an employee record, you can select your template, and the default values will automatically fill in the employee record. For example, you can create a template for customer support reps that are paid hourly. On the template, you can select your support department and class, and the location of this support team. You can also select payroll earnings, withholdings, and deductions, and then designate the employee as a support rep.

When you add a support rep employee, you can select your template to fill in all the appropriate information. Go to Lists > Employees > Employees > New. Enter the employee's name and contact information, and then set up access to NetSuite, if necessary.



**Note:** You must have the Advanced Employee Permissions feature enabled to view employee templates. For more information, see [Advanced Employee Permissions Overview](#).

### To create an employee template:

1. Go to Lists > Employees > Employees.
2. In the Employees list, click **New Template**.
3. In the **Employee ID Template** field, enter a name for this template. You will select this name in the **Template** field when creating new employee records.
4. Under Classifications, you can:
  - Select a default department, class, and location for employees. Click the plus sign next to any of these fields to create a new department, class, or location.
  - If you use NetSuite OneWorld, you can select a default subsidiary for employees.
  - If the **Project Management** feature has been enabled, you can select a default billing class for employees. An employee's billing class sets the rate billed for that employee's time.
5. On the **Human Resources** subtab, you can define defaults for the following:
  - **Type** - Select an employee type from those defined at Setup > Accounting > Employee Related Lists.
  - **Sales Role** - If this template is for sales reps, select a sales role. Sales roles are defined at Setup > Sales > CRM Lists. If you select from this field, sales territories can be assigned to employees

whose records are entered with this template. These employees can be selected in the **Sales Rep** field on customer records.

- **Support Rep** - If this template is for support reps, check this box. If you check this box, case territories can be assigned to employees whose records are entered with this template. These employees can be selected in the **Assigned To** field on case records.

6. Click **Save** to make your template available on employee records.

## Managing Subtabs on the Employee Template

The following subtabs that appear on the employee template depend on the enabled features in your account. For example, if you have SuitePeople U.S. Payroll enabled in your NetSuite account, the Payroll subtab will be available to you on the employee template.

The most common subtabs that will appear on the employee template include the following:

- Payroll subtab
- Project Management subtab
- Time-Off Management subtab

### To define values on the Payroll subtab:

1. Check the **Include in Payroll** box to indicate if the employees created with this template are included in SuitePeople U.S. Payroll.
2. Check the **Compensation Type** box to indicate if the employees created with this template are paid on a wage basis or on a salary basis.
3. Check the **Pay Frequency** box to indicate how often employees created with this template are paid.
4. Check the **Workplace** box to select an existing workplace for the employees created with this template, or click the plus sign to create a new one.
5. You can define more Payroll items such as earnings, taxes, deductions, contributions, and accrued time for the employees created with this template.
  - For steps on setting up deductions, see the help topic [Setting up Deductions for an Employee](#).
  - For steps on setting up company contributions, see the help topic [Setting up Company Contributions for an Employee](#).
  - For steps on setting up accrued time such as vacation and sick time, see the help topic [Setting up Accrued Time for an Employee](#).
6. Click **Save** to make your template available on employee records.

### To define values on the Project Management subtab:

1. If the **Project Management** feature has been enabled, you can check the **Project Resource** box to enable the employee to be added as a resource on projects and tasks.
  - If the Project Resource box is checked for this employee, the following fields are available for customization:
    - You can check the **Project Manager** box to mark the employee as a Project Manager.
    - In the **Default Project Resource Role** field, you can select which role the employee will be assigned when they are assigned to a project.
    - In the **Target Utilization** field, enter the percentage of time the employee has or will contribute to project work.

- In the **Work Calendar** field, select the work calendar for this employee.
- 2. Click **Save** to make your template available on employee records.

### To define values on the Time-Off Management subtab:

1. If the **Time-Off Management** feature has been enabled, you can check the **Time-Off Self Approver** to enable this employee to approve their own time-off requests.
2. Click **Save** to make your template available on employee records.

### To define values on other subtabs:

1. If the **System Information** subtab is available to you, you can check the **Inactive** box to deactivate the employee record for this template.
2. If the SuiteCloud platform is available to you, a **Custom** subtab will appear on the employee template. You can add any custom fields you think would be relevant for the employee template. For more information about custom fields, see the help topic [Custom Fields](#).
3. The **Access** subtab will be available depending on any bundles you have installed in your account. For example, if you have the Expensify bundle installed, you can check the **Restrict Access to Expensify** box to restrict this employee from accessing Expensify. For more information about installing SuiteBundles, see the help topics [SuiteBundler Overview](#) and [SuiteApp Installation and Update](#).

## Working with Employee Social Security Numbers



**Warning:** If you run scripts as an administrator with access to employee records, these scripts may expose social security numbers to any user. For example, a user is assigned to a role that has permission to run and deploy scripts. The user does not have permission to view the employee record. However, they can still view social security numbers when they attempt to access parts of the employee record. To prevent unintended access to this information, only run your script using an appropriate role that masks social security numbers.

Social security numbers are masked and encrypted by default when displayed on the screen or when records or transactions are printed. Only administrators or users with permission to access social security number data can view the numbers unmasked.

Users permission to access social security number data is based on the level of the Employee Social Security Numbers permission. This permission is associated with their assigned roles. This permission can be at one of the following two levels:

- **Masked** – Social security numbers appear in masked form such as (\*\*\*\*\*-\*\*\*\*\* or \*\*\*\*\*-\*\*\*\*\*). If 11 characters are displayed, it indicates that hyphens were used when the social security number was entered.
- **Full** – The complete social security numbers is displayed such as (123-11-1234).

Users assigned standard roles can access social security number data as follows:

Role	Permission Level
Administrator	Full
Employee Center	Masked

Role	Permission Level
Payroll Manager	Full
Payroll Setup	Full
System Administrator	Full

Social security number data is masked or displayed based on role access level when a user does any of the following:

- Views the employee list
- Views or edits HTML or PDF formats of forms
- Views reports
- Customizes reports
- Saves or views saved reports

## Social Security Numbers in Search

To ensure the security of your employees' social security numbers, NetSuite encrypts social security numbers. Because the numbers are encrypted, you cannot run a search that includes social security numbers in the results using the summary type Group.

## Printing Mailing Labels for Employees

You can print mailing or shipping labels for employees without using mail merge or data export. For more information on printing mailing labels, see the help topic [Printing Mailing and Shipping Labels](#).

To print mailing or shipping labels, go to Transactions > Management > Print Checks and Forms. Click the Mailing Labels link.

# Effective Dating for Employee Information

The Effective Dating feature enables you to make changes to the employee record that are back-dated or future-dated to a specific date. These changes represent when a particular piece of information became effective or true, regardless of when you made the change. To use the effective dating feature, you must be logged into NetSuite as an Administrator, a Chief People Officer (CPO), or an HR Generalist.

When you make an effective-dated change, you specify a change reason to document why the change was made. This enables you to track and distinguish changes by reason. When you enable the Effective Dating feature, several default change reasons become available, but you can create new ones that match your company's policies.

Watch the following help videos for information about using the Effective Dating feature:

-  [Using Effective Dating with the Employee Record](#)
-  [Managing Employee Change Reasons for Effective Dating](#)

For more information about this feature, see these topics:

- [Using Effective Dating With the Employee Record](#)
- [Managing Employee Change Reasons](#)
- [Searching for Effective-Dated Changes to the Employee Record](#)
- [Using Effective Dating with Other NetSuite Features](#)
- [Using Effective Dating with Employee Workflows and SuiteScripts](#)

## Using Effective Dating With the Employee Record

The SuitePeople Effective Dating feature enables you to make changes to the employee record that are effective as of a past, current, or future date. These changes represent when a particular piece of information became effective or true, regardless of when you made the change. To use the Effective Dating feature, you must be logged into NetSuite using a role that has the Employee Effective Dating permission. By default, this permission is automatically assigned to the standard Administrator, Chief People Officer (CPO), and HR Generalist roles. This permission also gives you access to the employee timeline from the employee record. For more information, see [Viewing an Employee's Timeline](#).

-  [Using Effective Dating with the Employee Record](#)

The Effective Dating feature lets you view, edit, and search for effective-dated changes. For more information, see the following help topics:

- [Viewing an Employee's Record as of a Date](#)
- [Editing an Employee's Record as of a Date](#)
- [Searching for Effective-Dated Changes to the Employee Record](#)
- [Editing Employee Records Using CSV Import for Effective Dating](#)

Many fields on the employee record are supported by effective dating, but others are not. When you view an employee record, fields that are not supported are labeled Not Effective-Dated.



**Important:** If you disable this feature after using it, back-dated or future-dated changes you made are lost. Only the current state of the employee records is kept.



**Note:** Inline editing is disabled when the Effective Dating feature is enabled.

## Roles and Permissions

For information about the permission requirements for effective dating, see [Effective Dating Permission Requirements](#).

## Viewing an Employee's Record as of a Date

If you use the Effective Dating feature, you can view many of the fields on an employee's record as of a specified date.

### To view an employee record as of a date:

1. Go to Lists > Employees > Employees.
2. Click **View** next to the name of the appropriate employee.
3. On the employee record page, under **Actions**, click **View As Of Date**.
4. In the Select Effective Date Information window, enter or select a date and then click **OK**.

The employee record page is refreshed showing the Viewing As Of banner to indicate that you are viewing an effective-dated view of the employee record. Note that the fields that are not effective-dated are labeled.



**Note:** You can also click the **Effective Date Log** subtab to view all effective-dated changes made to the employee's record. Use the **Field** and **Change Reason** filters to find specific changes.

## Editing an Employee's Record as of a Date

If you are using the Effective Dating feature, you can edit many of the fields on an employee's record as of a specified date. This lets you back-date a change to employee information and specify when a particular piece of information was valid or true.

### To edit an employee record as of a date:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the name of the appropriate employee. You can also click **Edit** from a view of an employee record.
3. In the Select Effective Date Information window, enter or select the date as of which you would like to edit the employee record.
4. Select a change reason from the **Change Reason** dropdown list. Optionally, enter details of the change to further describe it. Click **OK**.

The employee record page appears showing the Editing As Of banner to indicate that you are editing an effective-dated view of the employee record. Note that the fields that are not effective-dated are labeled.

5. Make the required changes to the employee record.
6. Click **Save**. The changes you made will appear in the **Effective Date Log** subtab.
7. If there are any conflicts between the changes you want to make and previously made effective-dated changes, they appear in the **Field Conflicts Found** window. To resolve the conflicts, do the following:
  1. To keep a previously created change, click **Keep** beside the change.
  2. To reject a previously created change, click **Override** beside the change.
  3. When you are finished resolving the conflicts, click **Confirm**.

## Editing Employee Records Using CSV Import for Effective Dating

You can bulk edit employee records using the Effective Dating feature and CSV import. This lets you update employee records as of a past, current, or future date. Prepare your CSV file for import by sorting it from past to future-dated changes. You may include the column's Internal ID, Effective Date, Change Reason, and Change Reason Details.

### To bulk edit employee records using CSV import:

1. Go to Setup > Import/Export > Import CSV Records.
2. Follow the steps on Importing CSV Files with the Import Assistant.
3. During the Field Mapping step, ensure the Effective Dated fields in NetSuite are mapped to the corresponding fields in the CSV. The Effective Dated fields are Effective Date, Change Reason, and Change Reason Details.
4. Confirm the CSV has the status Complete on the Job Status page after it has finished importing

The Set By field in the Effective Dated Log will be set to the logged-in user that performed the import.

**Note:** Use Multi-Threading is disabled when importing a CSV with Effective Dated fields.

**Note:** When dealing with Effective-Dated conflicts, NetSuite applies future-dated changes as they come up. For example, there is a future-dated change for March 1, 2020 and an effective dated change is imported for February 1, 2020. The February 1 change will be applied until March 1, when that change becomes effective.

## Managing Employee Change Reasons

If you have the Effective Dating feature enabled, you must specify an employee change reason when you make an effective-dated change to an employee record. Several default change reasons are provided when the feature is enabled. You can edit or delete these, and create your own.

Watch the following help video for information about how to create and search for Employee Change Reasons.

 Managing Employee Change Reasons for Effective Dating

**i Note:** You cannot delete an employee change reason that has been used to make an effective-dated change. If you no longer want to use a particular employee change reason, you can make it inactive. This causes it to not be available when an effective-dated change is made.

If you enable the Employee Change Requests feature, you cannot delete an employee change reason that is linked to an employee change request type.

## Creating Employee Change Reasons

Use the following procedure to create an employee change reason.

### To create an employee change reason:

1. Go to Setup > HR Information System > Employee Change Reasons.
2. Click **New Employee Change Reason**.
3. On the Employee Change Reason page, enter a **Name** and **Description** for the reason.
4. Click **Save**.

## Editing or Inactivating Employee Change Reasons

Use the following procedure to edit or deactivate an employee change reason.

### To edit or deactivate an employee change reason:

1. Go to Setup > HR Information System > Employee Change Reasons.
2. Click **Edit** next to the change reason you want to edit.
3. On the Employee Change Reason page, enter a **Name** and **Description** for the reason.
4. To deactivate the change reason so that it is no longer available to select when editing an employee record, check the **Inactive** box.
5. Click **Save**.

## Searching for Employee Change Reasons

Use the following procedure to search for employee change reasons.

### To search for employee change reasons:

1. Go to Reports > New Search
2. Click **Employee Change Reason**.
3. Specify any search parameters you want to include.
4. Click **Submit**.

The Employee Change Reasons Search: Results page shows the results of your search.

# Using Effective Dating with Other NetSuite Features

When the Effective Dating feature is enabled, there are NetSuite limitations with some functionality.

## Overriding Future Changes

Any effective-dated change, whether past, present, or future, overrides any future-dated changes relative to the change being made.

## Impact of Effective Dating on Employee Workflows and SuiteScripts

With the Effective Dating feature enabled:

- When you change the current version of an employee record, NetSuite executes all workflows and scripts that are triggered by employee record changes.
- When you make a past-dated change to an employee record, NetSuite does not execute workflows and scripts that normally are triggered by employee record changes.
- When you make a future-dated change, the system does not immediately execute workflows and scripts that normally are triggered by employee record changes. These workflows and scripts are run when the date specified in the future-dated change arrives.
- Any change that you make to the employee record will conflict with any future-dated changes that are dated after the change you are making now. If you make this change in the user interface, the system displays a window showing the conflicts and prompting you to confirm them. With workflows and scripts, the future-dated change is automatically overridden. For example, you change an employee's department from Sales to Marketing as of January 1, 2021. Then, you change that employee's department from Sales to HR as of today. The future-dated change from Sales to Marketing is overridden.
- Every effective-dated change requires a change reason. If a workflow or script does not provide a change reason, a default change reason is provided. This is to ensure that the workflow or script does not fail. For information about providing a change reason while scripting, see [Using Effective Dating with Employee Workflows and SuiteScripts](#). Here is a list of the default change reasons provided:
  - CSV Import Change - This employee's information has been changed using CSV import.
  - New Employee Record - This employee is new to the SuitePeople system.
  - Web Service Change - This employee's information has been changed using SOAP web services.
  - SuiteScript Change - This employee's information has been changed using SuiteScript.
  - Employee Self-Change - This employee's information has been changed by this employee.

## Giving Employees Access and Assigning Roles

When you give an employee access to NetSuite, you check the Give Access box on the Access subtab of their employee record. Then, you assign a role to the employee, and make sure that the employee's email address is accurate so that NetSuite can contact them. These fields are not effective-dated. If you change any of these settings, the change takes effect immediately, even if you do so as part of an effective-dated change. For more information, see [Giving an Employee Access to NetSuite](#) and [Assigning Roles to an Employee](#).

## Updating an Employee's Supervisor

When you change an employee's supervisor on their employee record, you can then go to the Human Resources > Supervisor Change Hist. subtab and change the effective date for this change. This is not governed by the Effective Dating feature.

## Payroll Effective Dates

If you are using SuitePeople U.S. Payroll, note that the Payroll tab on the employee record has several fields that have an Effective Date and an Expiration Date. These values are not governed by the SuitePeople Effective Dating feature. These fields include: Earnings, Deductions, Company Contributions, and Accrued Time.

## Advanced Employee Permissions Feature

The following permission requirements are required when you use the Effective Dating feature with the Advanced Employee Permissions feature enabled.

- To view effective dating changes, a role must be assigned the Employee Effective Dating permission, and the Employees, Employee Confidential, or Employee Administration permission.
- By default, only the Employee Effective Dating permission gives access to the effective dating logs and the employee change search. However, you can customize any of the employee permissions to include effective dating logs. Note the following about users assigned to a role with a customized employee permission that includes effective dating logs. These users see only what they have access to see, based on the permissions assigned to the role. For example, a role with the Employee Confidential permission will see effective dating logs only for their direct reports and below.

For more information about the Advanced Employee Permissions feature, see [Advanced Employee Permissions Overview](#).

## Employee Change Requests Feature

Before you enable the Employee Change Requests feature, you must also enable the Effective Dating feature. The Effective Dating feature impacts employee change requests in the following ways:

- When you create an employee change request type, you must select an employee change reason. This is the employee change reason that will be used to make approved future-dated changes to an employee's record.
- When you create an employee change request, you must select a proposed future-date. This is the date the approved changes will be applied to an employee's record. Fields that are approved to change appear on the Effective Date Log subtab on the employee's record.

For more information about the Employee Change Requests feature, see [Employee Change Requests](#).

## Using Effective Dating with Employee Workflows and SuiteScripts

You can make past, future, or current-day changes to the employee record using the user interface and using workflows and SuiteScripts. When you make an effective-dated change to the employee record,

you specify a change reason. When you make past or future effective-dated changes, you also specify the effective date for the change.

## Current Day Changes

Here is a sample of how you make changes to today's version of the employee record:

```

1 | require(['N/record'], function (record) {
2 |   var rec = record.load({type: 'employee', id: '659'});
3 |   rec.setValue({fieldId: 'initials', value: 'CC'});
4 |   rec.setValue({fieldId: 'employechangereason', value: '4'});
5 |   rec.save({ignoreMandatoryFields: true});
6 | });

```

## Future or Past Effective-Dated Changes

Here is a sample of how you make changes to the employee record on a future or past date:

```

1 | define(['N/record','N/format'], function(record, format) {
2 |   function onRequest(){
3 |     var loadDate = format.parse({value: "14/11/2021", type: format.Type.DATE});
4 |     var rec = record.load({type: "employee", id: '2730', defaultValues: {effectivedate: "14/11/2021"}}); // or customers date format in
this case, mm/dd/yyyy
5 |     rec.setValue({fieldId: "title", value: "Manager"});
6 |     rec.setValue({fieldId: "effectivedate", value: loadDate});
7 |     rec.save({ignoreMandatoryFields: true});
8 |   };
9 |
10 |   return {
11 |     onRequest : onRequest
12 |   }
13 | });

```

**Note:** The effectivedate field syntax must match the format you have chosen in your company settings. Go to Setup > Company > Preferences > General Preferences to configure your Date Format. Confirm that any SuiteScripts or workflows that reference the effectivedate field are using the same format.

# Employee Change Requests

The Employee Change Requests feature enables managers to initiate requests for changes to their direct reports in NetSuite. Managers can initiate an employee change request for their subordinates in the Employee Center and have it go through an approval process. Approvers can approve or decline employee change requests, and approved requests are reflected in the employee's record on a proposed future date.

For more information about the Employee Change Requests feature, see the following topics:

- [Prerequisites for Employee Change Requests](#)
- [Employee Change Requests Management](#)
- [Employee Change Requests in the Employee Center](#)
- [Employee Change Request Statuses](#)

## Prerequisites for Employee Change Requests

To use the Employee Change Requests feature, you must enable dependent features and set up employee change request types. Then, you must assign Advanced Employee Permissions to requesters and approvers. Finally, you must set up an approval workflow. For more information, see the following topics:

Watch the following help video for information about employee change requests:



### [Employee Change Requests Overview](#)

- [Enabling the Employee Change Requests Feature](#)
- [Setting Up Employee Change Request Types](#)
- [Advanced Employee Permissions for Employee Change Requests](#)
- [Approval Workflow for Employee Change Requests](#)

## Enabling the Employee Change Requests Feature

The Employee Change Requests feature is dependent on Advanced Employee Permissions, Effective Dating, Compensation Tracking, and Job Management. These four features are automatically enabled when you enable the Employee Change Requests. To create an approval workflow for employee change requests, you must enable SuiteFlow. To allow managers to create employee change requests in the Employee Center, you must enable Employee Center Dashboard Publishing.

### **To enable the Employee Change Requests feature:**

1. Go to Setup > Company > Enable Features.
2. On the **Employees** subtab, check the **Employee Change Requests** box.
3. If you want managers to create employee change requests in the Employee Center, on the **Employees** subtab, check the **Employee Center Dashboard Publishing** box.
4. On the **SuiteCloud** subtab, check the **SuiteFlow** box.
5. Click **Save**.

## Setting Up Employee Change Request Types

Before managers can create employee change requests, an HR Administrator or other user with appropriate permission must set up employee change request types. Employee change request types provide managers with the types of changes they can initiate for their direct reports.

### When creating an employee change request type:

1. First, choose the fields you want to appear on the employee change request.
2. Then, assign an employee change reason. The employee change reason you select for each employee change request type is used to make a future effective-dated change to employees' records. After an employee change request is approved by all approvers, the requested changes to fields on the employee's record are applied on a future date. The change appears in the Effective Date Log subtab on the employee's record as an effective-dated change

After an employee change request is approved by all approvers, the requested changes to fields on the employee's record are applied on a future date. The change appears in the Effective Date Log subtab on the employee's record as an effective-dated change

Watch the following help video for information about setting up employee change request types.



[Employee Change Request Types](#)

## Default Employee Change Request Types

The Employee Change Requests feature includes three default employee change request types:

- [Base Pay Change Template Type](#)
- [Promotion Template Type](#)
- [Transfer Template Type](#)

You can edit, delete, or make copies of these types.

### Base Pay Change Template Type

Base pay compensation includes an employee's regular salary or wage earnings.

You can view and edit an employee's base pay by clicking the Compensation subtab on the employee record. The employee's base pay information is recorded in the following fields:

- Compensation Currency
- Base Wage Type
- Base Wage

When the base pay change template type is set up, managers and HR administrators can change an employee's pay by completing an employee change request. For more information about setting up a base pay change template type, see [Creating New Employee Change Request Types](#).

For more information about completing a base pay change request type, see [Creating a Base Pay Change Request From the Employee Record](#).

### Promotion Template Type

The promotion type permits managers and HR Administrators to promote an employee.

Information about the employee's promotion is recorded in the following fields on the employee record:

- Supervisor

- Job
- Compensation Currency
- Base Wage Type
- Base Wage

If administrators have set up the promotion template type, managers and HR administrators can promote an employee by completing an employee change request. For more information about setting up a promotion template type, see [Creating New Employee Change Request Types](#).

For more information about completing a promotion change request type, see [Creating a Promotion Change Request From the Employee Record](#).

## Transfer Template Type

The transfer type permits managers and HR Administrators to transfer an employee to a different department, location, or supervisor.

Information about the employee's transfer is recorded in the following fields on the employee record:

- Supervisor
- Department
- Location

If administrators have set up the transfer template type, managers and HR administrators can transfer an employee by completing an employee change request. For more information about setting up a transfer template type, see [Creating New Employee Change Request Types](#).

For more information about completing a transfer change request type, see [Creating a Transfer Change Request From the Employee Record](#).

## Creating New Employee Change Request Types

You can add a new employee change request type if you have the Employee Change Request Types permission at access level Create, Edit, or Full. For more information, see [Employee Change Requests Permission Requirements](#).

### To create an employee change request type:

1. Go to Setup > HR Information System > Employee Change Request Types.
2. Click **New Employee Change Request Type**.
3. On the Employee Change Request Type page, enter a **Name** and **Description** for the employee change request type.
4. From the **Change Reason** list, select a change reason.  
This is the change reason used to apply the requested changes on the employee's record after the employee change request is approved by all approvers. For more information about employee change reasons, see [Managing Employee Change Reasons](#).
5. In the **Guidelines for Request** field, enter any information that will assist employees when initiating this change request type. The guidelines that you enter here will be displayed to any employee who chooses to initiate a change request using this employee change request type.
6. In the **Related Fields** subtab, select the fields you want to include in the employee change request.  
The fields you choose here appear on the employee change request when you select this employee change request type. After all the approvers approve the request, these fields on the employee's record are changed on the proposed future date.

- a. To add a field, select a field from the list, then click **Add**.

For example, if you are creating a transfer change request, you can select the following related fields:

- Location
- Department
- Supervisor
- Job

You can add related links next to each Related Field to give the manager creating the request useful information about each field.

7. Under the **Insights** tab, check the insights that you want to appear for managers and approvers.

The following insights are available:

- **Job Duration** — The range of time past employees have been in this employee's current role.
- **Salary Increase** — The range of salary increases for other employees within the organization in the same proposed position and location.

These insights are based on two years of organizational data.

8. Click **Save**.

## Editing or Inactivating Employee Change Request Types

You can edit an employee change request type if you have the Employee Change Request Types permission access level at Edit, or Full. For more information, see [Employee Change Requests Permission Requirements](#).

### To edit or deactivate an employee change request type:

1. Go to Setup > HR Information System > Employee Change Request Types.
2. Click **Edit** beside the employee change request type you want to edit.
3. In the **Related Fields** subtab, add, delete, or move fields that you want to appear on the employee change request form.

The fields you choose here are changed on the employee record after all the approvers approve the request.

4. From the **Change Reason** list, select a change reason.

This is the change reason that is used to apply the requested changes as an effective-dated change on the employee's record. For more information about employee change reasons, see [Managing Employee Change Reasons](#).

5. To make it unavailable for selection when creating employee change requests, deactivate an employee change request type by checking the **Inactive** box.
6. When you are finished, click **Save**.

## Deleting Employee Change Request Types

You can delete an employee change request type only if it is not in use. In addition, you must have the Employee Change Request Types permission access level at Full. For more information, see [Employee Change Requests Permission Requirements](#).

If you no longer want to use an employee change request type, you can make it inactive. For more information, see [Editing or Inactivating Employee Change Request Types](#).

## To delete an employee change request type:

1. Go to Setup > HR Information System > Employee Change Request Types.
2. Click **Edit** beside the employee change request type you want to delete.
3. Point to **Actions**, and click **Delete**.

## Advanced Employee Permissions for Employee Change Requests

Before you use the Employee Change Requests feature, you must assign Advanced Employee Permissions to employees' roles. Requesters and approvers must have the correct Advanced Employee Permissions assigned to their role to successfully create, view, approve, and apply employee change requests. Human Resources Generalist, Chief People Office, and Administrator roles all have Employee Change Request permissions by default.



**Important:** Each requester and approver must have permission to view the fields in an employee change request. If you do not have permission to view a field, you cannot view the employee change request. The final approver must have permission to edit the fields in an employee change request to apply the requested changes. For more information, see [Advanced Employee Permissions Overview](#).

For example, for a manager to create an employee change request to promote a direct report, their role must have permission to:

- View their subordinate's salary, which requires the Employee Compensation permission. For more information, see [Employee Compensation Permission Overview](#).
- View their direct report's job, which requires the Employee Confidential permission. For more information, see [Employee Confidential Permission Overview](#).



**Note:** If you want requesters to create employee change requests from the Employee Center, you must enable the Employee Dashboard Publishing feature. Alternatively, requesters can create employee change requests from employee records if their role has the Employee Record permission access level at View, Edit, or Full. Requesters must also have the Advanced Employee Permissions at some access level.

For more information about the Advanced Employee Permissions feature, see [Advanced Employee Permissions](#). For more information about how to set up specific employees using Advanced Employee Permissions, see [Advanced Employee Permissions Use Cases](#).

## Approval Workflow for Employee Change Requests

You must set up an approval workflow before your company can begin creating employee change requests. This workflow defines and automates the approval process to approve changes to employees in your company.

## Setting Up an Approval Workflow for Employee Change Requests

You can set up an approval workflow for your company's employee change requests by assigning approvers to a workflow template.

Watch the following help video for information about setting up an approval workflow for employee change requests:



[Creating an Approval Workflow for Employee Change Requests](#)

### To set up an approval workflow for employee change requests:

1. Go to Customization > Workflow > Workflows.
2. Click **New Workflow**.
3. Click **From Template**.
4. Go to the **Employee Change Request Approval** template and click **Select**.
5. If you want to have an intermediate approver, select the person you would like to assign from the **Intermediate Approver** list.
6. Go to the **Final Approver** list and select the person you would like to assign as final approver.
7. Click **Continue**.
8. Go to the **Workflow** subtab and click the edit icon.
9. Enter a unique name for the workflow in the **Name** field.
10. In the **Release Status** list, select **Released**.
11. Click **Save**.

## Setting Up a Custom Approval Workflow for Employee Change Requests

You can set up a custom approval workflow for your company's employee change requests. You can customize your approval workflow by setting approvers according to your company's needs. For example, the next

approver in your workflow could be set by the following:

- **Employee name** For example, if you want approvals to go through a set group of HR managers, you can set each approver as each HR manager.
- **Relationship to the employee**. For example, you can set the next approver to be the supervisor of the employee for whom you are creating the request.
- **Relationship to the requester**. For example, you can set the next approver to be the supervisor of the requester.
- **Relationship to the approver**. For example, you can set the next approver to be the supervisor of the current approver.

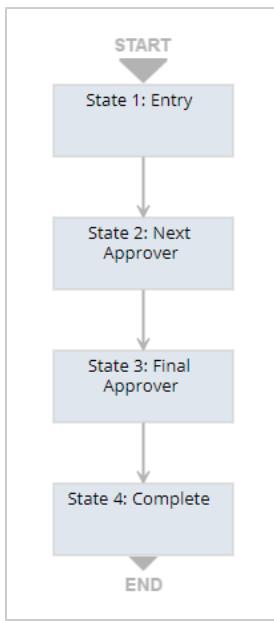


**Note:** You should set the final approver in your workflow to be an HR personnel so they can check the employee change request for accuracy.

For information about creating a custom employee change request approval workflow, see [Sample Custom Employee Change Request Workflow](#). For more information, see .

## Sample Custom Employee Change Request Workflow

This sample workflow demonstrates how to create a workflow for employee change requests that includes two approvers. A specific employee is set as each approver.



The following table describes the required states, actions, and transactions for this workflow.

State	Actions	Transitions
State 1: Entry	There are no actions for this state.	Transitions to <b>State 2: Next Approver</b> after an employee change request is created by a manager.
State 2: Next Approver	Set an employee to be the next approver.	Transitions to <b>State 3: Final Approver</b> after the employee set in State 2: Next Approver has approved the employee change request.
State 3: Final Approver	Set an employee to be the next approver and set this employee as the final approver.	Transitions to <b>State 4: Complete</b> after the final approver approves the employee change request.
State 4: Complete	Set the status of the employee change request to Complete and set the final approver to false.	There are no transitions for this state.

When you build your own employee change request workflow, you can include additional approver states between **State 2: Next Approver** and **State 3: Final Approver**. To do this, use the same action and transition that you use for **State 2: Next Approver** for the additional states.

You must use the actions for **State 3: Final Approver** for the final approver in your workflow. For example, you create a workflow with three approvers. Use the instructions for [Setting Up State 2: Next Approver](#) for your first and second approver states. Then, follow the instructions for [Setting Up State 3: Final Approver](#) for the third approver.

To begin building the Employee Change Request Workflow, go to [Building the Custom Employee Change Request Workflow](#).

## Building the Custom Employee Change Request Workflow

Create the workflow definition and define the basic workflow properties and the workflow initiation properties. The workflow initiates after a manager creates an employee change request.

**To create the workflow definition and define when the workflow initiates:**

1. Go to Customization > Workflow > Workflows.
  2. Click **New Workflow**.
  3. Set the following in the **Basic Information** field group:
    - a. In the **Name** field, enter a name for your workflow, such as **Employee Change Request Workflow**.
    - b. In the **Record Type** list, select **Employee Change Request**.
    - c. In the **Release Status** list, select **Testing**.
- Note:** Set Release Status to **Testing** until it is ready for production. When your workflow is ready for production, you can set it to **Released**.
- d. In the **Keep Instance and History** list, select **Only When Testing**.
  - e. Check the **Enable Logging** box.
  4. In the **Initiation** field group, choose **Event Based**.
  5. In the **Event Definition** field group, check the **On Create** box.
  6. Click **Save**.
  7. To continue with the Employee Change Request workflow, go to [Creating States for the Employee Change Request Workflow](#).

## Creating States for the Employee Change Request Workflow

After you create the workflow definition, create workflow states for each of the following events:

- Entry
- Next Approver
- Final Approver
- Completed

This procedure uses only two approvers, however, you can include additional approver states as needed.



**Important:** Each approver must have permission to view the fields in an employee change request. The final approver must have permission to edit the fields in an employee change request to apply the changes requested to the employee's record. For more information, see [Advanced Employee Permissions for Employee Change Requests](#).

### To create states for each event:

1. If your Employee Change Request Workflow is not already built, go to [Building the Custom Employee Change Request Workflow](#).
2. In the workflow diagrammer, click **New State**.  
A new state appears in the diagrammer.
3. Double-click the state you want to rename in the diagrammer.  
Alternatively, you can do the following:
  - a. In the diagrammer, click the state you want to rename.
  - b. In the context panel in the **State** tab, click the **Edit** icon.
4. Repeat the above steps to create states for the following events in the workflow:
  - State 1: Entry

- State 2: Next Approver
- State 3: Final Approver
- State 4: Complete



**Note:** If you want more than two approvers in your workflow, create additional states between **State 2: Next Approver** and **State 3: Final Approver** as needed.

5. To continue with the Employee Change Request Workflow, go to [Setting Up State 1: Entry](#).

## Setting Up State 1: Entry

After you create the states, you can set up the transition from **State 1: Entry** to **State 2: Next Approver**. If a manager creates an employee change request, this transition triggers the next approver state.

### To set up the transition to State 2: Next Approver:

1. If you have not created states for your Employee Change Request Workflow, go to [Creating States for the Employee Change Request Workflow](#).
2. In the diagrammer, point to the bottom of **State 1: Entry**. The icon becomes a filled half-circle.
3. Drag the icon to **State 2: Next Approver**.
4. In the diagrammer, double-click the transition arrow from **State 1: Entry** to **State 2: Next Approver**.
5. In the **Workflow Transition** window, set the following:
  - a. In the **To** list, select **State 2: Next Approver**.
  - b. In the **Transition On** list, select **After Record Submit**.
6. Click **Save** to save your changes to the transition.
7. To continue with the Employee Change Request Workflow, go to [Setting Up State 2: Next Approver](#).

## Setting Up State 2: Next Approver

After you set up **State 1: Entry**, you can set up **State 2: Next Approver**. If a manager creates an employee change request, this state sets a specified employee as the next approver.



**Note:** If you want to include additional approvers in your own workflow, repeat these steps for each approver state that is not the final approver.

State 2: Next Approver

### To set up State 2: Next Approver:

1. If you have not set up State 1, go to [Setting Up State 1: Entry](#).
2. In the diagrammer, click **State 2: Next Approver**.
3. In the context panel on the **State** subtab, click **New Action**.
4. In the **New Action** window, click **Set Field Value**.
5. In the **Parameters** field group, in **Field** list, select **Next Approver**.
6. In the **Value** field group, choose **Static Value**.

7. In the **Selection** list, select the name of the employee you want to be the next approver.
8. Click **Save**.

Transition to Step 3: Final Approver

#### To set up the transition to Step 3: Final Approver:

1. In the diagrammer, hover over the bottom of **State 2: Next Approver**. The icon becomes a filled half-circle.
2. Drag the icon to **State 3: Final Approver**.
3. In the workflow diagrammer, double-click the transition arrow from **State 2: Next Approver** to **State 3: Final Approver**.
4. In the **To** list, select **State 3: Final Approver**.
5. In the **Transition On** list, select **After Record Submit**.
6. In the **Event Types** list, click **Approve**.
7. In the **Condition** field group, select **Visual Builder**.
8. Next to the **Condition** field, click the **Open** icon to open the Condition Builder.
9. Enter the following:
  - a. In the **Field** list, select **Next Approver**.
  - b. In the **Compare Type** list, select **Any Of**.
  - c. In the **Selection** list, select **Current User**.
10. Click **Add** to add the condition, and then click **Save** to save the condition.
11. Click **Save** to save your changes to the transition.
12. To continue with the Employee Change Request Workflow, go to [Setting Up State 3: Final Approver](#).

### Setting Up State 3: Final Approver

After you set up **State 2: Next Approver**, set up **State 3: Final Approver**. If the employee you assigned in State 2 approves the employee change request, the employee change request is sent to the final approver.



**Important:** The final approver must have permission to make changes to the employee's record for the fields specified in the employee change request. For more information, see [Advanced Employee Permissions for Employee Change Requests](#).



**Note:** You should set the final approver in your workflow to be an HR personnel so they can check the employee change request for accuracy.

State 3: Final Approver

#### To set up State 3: Final Approver:

1. If you have not set up State 2, go to [Setting Up State 2: Next Approver](#).
2. In the diagrammer, click **State 3: Final Approver**.
3. To set the next approver:

- a. In the context panel on the **State** subtab, click **New Action**.
  - b. In the **New Action** window, click **Set Field Value**.
  - c. In the **Field** list, select **Next Approver**.
  - d. In the **Value** field group, choose **Static Value**.
  - e. In the **Selection** list, select the name of the employee you want to be the final approver.
4. To set the final approver to true:
- a. In the context panel on the **State** tab, click **New Action**.
  - b. In the **New Action** window, click **Set Field Value**.
  - c. In the **Field** list, select **Final Approver**.
  - d. In the **Value** field group, choose **Static Value**.
  - e. Check the **Checked** box.
  - f. Click **Save** to save the action.

Transition to State 4: Complete

#### To set up the transition to State 4: Complete:

1. In the diagrammer, hover over the bottom of **State 3: Final Approver**. The icon becomes a filled half-circle.
2. Drag the icon to **State 4: Complete**.
3. In the workflow diagrammer, double-click the transition arrow from **State 3: Final Approver** to **State 4: Complete**.
4. In the **To** list, select **State 4: Complete**.
5. In the **Transition On** list, select **After Record Submit**.
6. In the **Event Types** list, click **Approve**.
7. In the **Condition** field group, select **Visual Builder**.
8. Next to the **Condition** field, click the **Open** icon to open the Condition Builder.
9. Enter the following:
  - a. In the **Field** list, select **Next Approver**.
  - b. In the **Compare Type** list, select **Any Of**.
  - c. In the **Selection** list, select **Current User**.
10. Click **Add** to add the condition, and then click **Save** to save the condition.
11. Click **Save** to save your changes to the transition.
12. To continue with the Employee Change Request Workflow, go to [Setting Up State 4: Complete](#).

## Setting Up State 4: Complete

After you set up **State 3: Final Approver**, set up **State 4: Complete**. If the final approver you assigned in State 3 approves the employee change request, this state sets the status of the request to Complete.

#### To set up State 4: Complete:

1. If you have not set up Step 3: Final Approver, go to [Setting Up State 3: Final Approver](#).
2. In the diagrammer, Select **State 4: Complete**.

3. To set the request status to complete:
  - a. In the context panel on the **State** subtab, click **New Action**.
  - b. In the **New Action** Window, click **Set Field Value**.
  - c. In the **Field** list, select **Request Status**.
  - d. In the **Value** field group, choose **Static Value**.
  - e. In the **Selection** list, select **Completed**.
  - f. Click **Save**.
4. To set the final approver to false:
  - a. In the context panel on the **State** tab, click **New Action**.
  - b. In the **New Action** window, click **Set Field Value**.
  - c. In the **Field** list, select **Final Approver**.
  - d. In the **Value** field group, choose **Static Value**.
  - e. Leave the **Checked** box unchecked.
  - f. Click **Save** to save the action.
5. Now that the workflow setup is complete, test and then release the workflow. To continue with the Employee Change Request Workflow, go to [Testing the Employee Change Request Workflow](#).

## Testing the Employee Change Request Workflow

Before releasing your workflow, test the workflow to make sure it functions as designed.

After setting your workflow release status to **Testing**, test the following functionality:

- Test workflow initiation. Make sure the workflow initiates when an employee change request is created. To create an employee change request, see [Creating an Employee Change Request From the Employee Record](#) and [Creating an Employee Change Request from the Employee Center](#).
- Test conditions. Set up a testing scenario where you can verify that the conditions in each state can evaluate to both true and false. For more information, see the help topic [Testing Workflow Conditions](#).
- Test actions and transitions. Make sure that the actions and transitions in each step appear in the workflow execution log and complete successfully. For more information, see the help topic [Testing Actions and Transitions](#).

After you have tested the Employee Change Request Workflow, change the release status to **Released**. For more information, see the help topic [Release Status](#).

## Employee Change Requests Management

HR Administrators or other users with appropriate permission can create new employee change requests from the employee record. They can also edit, delete, or deactivate existing employee change requests.

Before you create an employee change request, ensure you have completed [Prerequisites for Employee Change Requests](#).

For more information about managing employee change requests, see the following topics:

- [Creating an Employee Change Request From the Employee Record](#)
- [Creating a Base Pay Change Request From the Employee Record](#)

- Creating a Promotion Change Request From the Employee Record
- Creating a Transfer Change Request From the Employee Record
- Editing or Inactivating an Employee Change Request
- Deleting an Employee Change Request

## Creating an Employee Change Request From the Employee Record

Requesters can create employee change requests from employee records if their role has the Employee Record permission access level at View, Edit or Full. For more information, see the help topics [Setting Permissions](#) and [Advanced Employee Permissions for Employee Change Requests](#).

Watch the following help video for information about creating an employee change request from the employee record:



[Creating and Managing Employee Change Requests from Employee Records](#)

Managers can also create Employee Change Requests for their direct employees from the Employee Center. For more information, see [Creating an Employee Change Request from the Employee Center](#).

## Creating a Base Pay Change Request From the Employee Record

You can create an employee change request for base pay compensation from the employee record.

### To create an employee change request for base pay compensation:

1. Go to Lists > Employees > Employees.
2. Next to the employee you want to create a base pay change request for, click **View**.
3. From the **Actions** list, select **Create Employee Change Request**.
4. From the **Change Request Type** list, select a base pay change request type.
5. On the request form, complete the following fields:
  - From the **Compensation Currency** list, select the currency in which to compensate the employee.
  - From the **New Base Wage Type** list, select the type of compensation that the employee will receive.
  - If the employee does not already have a base wage, in the **New Base Wage** field, enter the amount.
  - If the employee has an existing base wage, you can do one of the following:
    - Enter a new value in the **New Base Wage** field.
    - Enter a percentage by which to change the amount in the **% Change** field.
  - In the **Proposed Date** field, enter or select a date in the future.
    - This date is used to apply the change as an effective-dated change. If your role has the permissions, you can edit this date up until the change status of Completed, Declined, or Expired.
  - In the **Justification** field, enter your reason for requesting this change.

6. Click **Submit**.

## Creating a Promotion Change Request From the Employee Record

You can create an employee change request for promotions from the employee record.

### To create an employee change request for promotions:

1. Go to Lists > Employees > Employees.
2. Next to the employee you want to create a promotion change request for, click **View**.
3. From the **Actions** list, select **Create Employee Change Request**.
4. From the **Change Request Type** list, select a promotion change request type.
5. On the request form, complete the following fields:
  - If the employee does not already have a base wage, in the **New Base Wage** field, enter the amount.
  - If the employee has an existing base wage, you can do one of the following:
    - Enter a new value in the **New Base Wage** field.
    - Enter a percentage by which to change the amount in the **% Change** field.
  - From the **New Base Wage Type** list, select the type of compensation that the employee will receive.
  - From the **Compensation Currency** list, select the currency in which to compensate the employee.
  - From the **New Job** list, select the employee's new job.
  - From the **New Supervisor** list, select the employee's new supervisor.
  - In the **Proposed Date** field, enter or select a date in the future.
    - This date is used to apply the change as an effective-dated change. If your role has the permissions, you can edit this date up until the change status of Completed, Declined, or Expired.
  - In the **Justification** field, enter your reason for requesting this change.
6. Click **Submit**.

## Creating a Transfer Change Request From the Employee Record

You can create an employee change request for transfers from the employee record.

### To create an employee change request for transfers:

1. Go to Lists > Employees > Employees.
2. Next to the employee you want to create a transfer change request for, click **View**.
3. From the **Actions** list, select **Create Employee Change Request**.
4. From the **Change Request Type** list, select a transfer change request type.

5. On the request form, complete the following fields:
  - From the **New Location** list, select the location of the employee's new job.
  - From the **New Department** list, select the department of the employee's new job.
  - From the **New Supervisor** list, select the employee's new supervisor.
  - From the **New Job** list, select the employee's new job.
  - In the **Proposed Date** field, enter or select a date in the future.
    - This date is used to apply the change as an effective-dated change. If your role has the permissions, you can edit this date up until the change status of Completed, Declined, or Expired.
  - In the **Justification** field, enter your reason for requesting this change.
6. Click **Submit**.

## Editing or Inactivating an Employee Change Request

After employee change requests are created, you can edit the request status, next approver, and justification. You can only edit an employee change request if you have the Employee Change Request permission access level at Edit, or Full. You can no longer edit the employee change request once it has the status Completed, Expired, or Declined. For more information, see [Employee Change Requests Permission Requirements](#).

### To edit or deactivate an employee change request:

1. Go to Setup > HR Information System > Employee Change Requests.
2. Click **Edit** next to the employee change request you want to edit.
3. On the request form, you can modify Request Status, Next Approver, and Justification.



**Note:** You must add an explanation in the **Reason** field if you set the Request Status to Declined.

4. To deactivate an employee change request, to make it unavailable, check the **Inactive** box.
5. When you are finished, click **Save**.



**Note:** The Approvals subtab at the bottom of the employee change request shows who has already approved or declined the employee change request.

## Deleting an Employee Change Request

You can delete existing employee change requests if you have the Employee Change Request permission access level at Full. For more information, see [Employee Change Requests Permission Requirements](#).



**Note:** When you delete an employee record, employee change requests for that employee are also deleted. For more information, see [Deleting Employee Records](#).

If you want to make an employee change request unavailable, you can make it inactive. For more information, see [Editing or Inactivating an Employee Change Request](#)

### To delete an employee change request:

1. Go to Setup > HR Information System > Employee Change Requests.
2. Click **Edit** next to the employee change request you want to delete.
3. On the request form, point to **Actions**, and click **Delete**.

## Employee Change Requests in the Employee Center

The Employee Center is the primary workspace for processing approvals. You must have a custom Employee Center role to access employee change requests in the Employee Center. An administrator can add a custom Employee Center role to your account. For more information, see [Adding an Employee](#).

To use employee change requests in the Employee Center, see the following topics:

- [Creating an Employee Change Request from the Employee Center](#)
- [Approving or Declining an Employee Change Request](#)
- [Viewing an Employee Change Request](#)

## Creating an Employee Change Request from the Employee Center

Managers can create employee change requests from a custom Employee Center role. They can create employee change requests on the Manager tab in the My Team portlet. To create an employee change request in the Employee Center, you must enable the Employee Center Dashboard Publishing feature. For more information, see [Employee Center Dashboard Publishing Feature](#).

Watch the following help video for information about creating an employee change request from the employee center:



[Employee Change Requests in the Employee Center](#)

### To create an employee change request:

1. On the **Manager** tab, go to the My Team portlet.
2. Point to the **Actions** menu next to the employee for whom you want to request a change. Then, select the type of change you want to make.



**Note:** If the type of employee change request you want to make is not in the list, contact your HR Administrator.

3. On the request form, complete the following:
  - **Request Changes** - The employee's current information appears on the left. Select new values from the fields on the right.
  - **Proposed Date** - Enter a future date in the date panel. This date is used to apply the change as an effective-dated change.



**Note:** The proposed date must be in the future. If this change is required now, contact your HR Administrator.

- **Justification** - Explain your reason for requesting this change.

4. Click **Submit**.

## Approving or Declining an Employee Change Request

After an employee change request is created, each approver set by your company's defined workflow must approve the request. Approvers receive an email when it is their turn to approve or decline the request.

### To approve or decline an employee change request:

1. On the **Employee** tab, go to the Home Links portlet.
2. Expand **Employee Change Requests** and click **Approve Pending Requests**.
3. Click **View** next to the request you want to approve.
4. Review the request, and then click **Approve** to approve the request, or click **Decline** to decline the request.
5. In the **Comments** field, enter an explanation for why you approve or decline the request. You must give a reason if you decline the request.

If you approve the request, one of the following occurs:

- If you are not the final approver, an email notification is sent to the next approver to approve or decline the request.
- If you are the final approver, the changes are applied to the employee's record on the proposed date.

If you decline the request, the next approvers can no longer approve the request. An email with your declining reason is sent to the manager who requested the employee change request.

An email is sent to the requester when an employee change request is completed successfully.

## Viewing an Employee Change Request

You can view employee change requests that you have created and employee change requests that require your approval.

If you are an approver and your role includes the Employees permission, you can have different levels of access in the approval process:

- If you are the final approver, note the following. You can approve and apply employee change requests when the **Employees** permission access level is **Edit** or higher. You must also have **Effective Dating Edit** or higher.
- If you are not the final approver, you can approve employee change requests when the **Employees** permission access level is set to **View** or higher.



**Note:** The Approvals subtab at the bottom of the employee change request shows who approved or declined the employee change request.

## Viewing an Employee Change Request That You Created

After you create an employee change request, you can view the request to keep track of its status.

### To view employee change requests that you created:

1. On the **Manager** tab, go to the Home Links portlet.
2. Expand **Employee Change Requests** and click **My Requests**.
3. Click **View** next to the request you want to view.

## Viewing an Employee Change Request That Requires Your Approval

You can view an employee change request that requires your approval. You must be the next approver to view the request.

### To view employee change requests that require your approval:

1. On the **Employee** tab, go to the Home Links portlet.
2. Expand **Employee Change Requests** and click **Approve Pending Requests**.
3. Click **View** next to the request you want to view.

## Employee Change Request Statuses

The following table describes each possible status for an employee change request.

Status	Description
Pending Approval	The employee change request is in progress and requires attention from the next approver.
Completed	The employee change request has been approved by all approvers. NetSuite applies the requested changes to the employee's record on the proposed date.
Declined	The employee change request has been declined and can no longer be approved. No changes are made to the employee's record. <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <b>Note:</b> If the request was declined because it requires a correction, create a new employee change request.           </div>
Expired	The employee change request has passed the proposed date and can no longer be approved. Create a new employee change request with a future proposed date. If a change is required now, contact HR.
Failed to Apply	The employee change request has been approved by all approvers but could not be applied to the employee's record. To have the changes applied, contact HR.

# Employee Directory and Org Browser

The Employee Directory SuiteApp enables your employees to quickly and easily search for their colleagues by name, location, department, and job title. If you use NetSuite OneWorld, employees can also search by subsidiary. This SuiteApp also provides an Org Browser. Employees can quickly browse through your organizational chart, viewing the supervisors and direct reports of fellow employees.

If SuitePeople HR is provisioned in your account and you use the Kudos feature, employees can give Kudos to colleagues directly from the employee directory. For more information, see [Kudos](#).

For more information about this SuiteApp, see the following topics:

- [Set Up the Employee Directory SuiteApp](#)
- [Using the Employee Directory](#)
- [Using the Org Browser](#)

## Set Up the Employee Directory SuiteApp

The following table describes the steps needed to set up the Employee Directory and Org Browser SuiteApp.

Step	Related Help Topic
1. Log in as a NetSuite Administrator.	<a href="#">Roles and Accounts</a>
2. Complete the prerequisites.	<a href="#">Prerequisites for the Employee Directory SuiteApp</a>
3. Install the SuiteApp.	<a href="#">Installing the Employee Directory SuiteApp</a>
4. Configure the SuiteApp.	<a href="#">Configuring the Employee Directory and Org Browser</a>
5. Update the required scripts to work with custom roles.	<a href="#">Updating Required Scripts for the Employee Directory and Org Browser</a>

 **Note:** Currently, the Employee Directory SuiteApp supports only US and UK English languages.

## Prerequisites for the Employee Directory SuiteApp

To install the Employee Directory SuiteApp, Employee Center provisioned for your account. Ensure these features are enabled in your NetSuite account before installation (if they are not on the Enable Features page, contact your NetSuite account manager):

- Custom Records
- Server SuiteScript

If you want to give Kudos from the SuiteApp, you must enable the Kudos feature in the Performance Management section of the Enable Features page.

## Installing the Employee Directory SuiteApp

Bundle Name: **Employee Directory**

Bundle ID: 112469

This is a managed bundle and is automatically updated. These issue fixes and enhancements are available after the SuiteApp is updated in your account.

For more information, see the help topic [Installing a Bundle](#).

## Configuring the Employee Directory and Org Browser

After installing the Employee Directory SuiteApp, configure the Employee Directory and Org Browser:

- Choose to use the Employee Directory, the Org Browser, or both.
- Choose four fields that will be on the Employee Directory for all employees.
- Choose three fields that will be on the Org Browser for all employees.
- Apply a filter to include or exclude employees based upon a NetSuite saved search.
- Specify a list of top-level employees in the Org Browser. They will be on the top of the org chart.

The Employee Directory SuiteApp includes a default saved search which filters out inactive and terminated users. To create a saved search to filter employees differently, select it on the Employee Directory Configuration page.

The directory listing for an employee shows the following information:

- Employee Name
- Office Phone Number
- Mobile Phone Number
- Email Address
- Action Button

Four additional fields appear in the directory listing for each employee. **Configurable Field 1** follows the employee's name. As an administrator, you can choose which fields appear from the following table:

Configurable Fields	Standard Fields	Custom Field Types
Configurable Field 1	Job Title	Free-Form Text List/Record
Configurable Field 2	Subsidiary Location Department Sales Role Type	Free-Form Text List/Record
Configurable Fields 3 & 4	Department Location Fax Hire Date Home Phone Phone	Free-Form Text List/Record Date Date/Time

Configurable Fields	Standard Fields	Custom Field Types
	Sales Role	
	Subsidiary	
	Supervisor	
	Type	



**Important:** The auto suggest feature and filter panel on the Employee Directory SuiteApp rely on the configurable fields you select. The SuiteApp suggests or filters employees based on four standard fields: **Job Title**, **Subsidiary**, **Location**, and **Department**. For example, **Job Title** is one of your configurable fields. You select and custom fields for the other configurable fields. The SuiteApp suggests and filters by job title.

Three additional fields appear in the org browser listing. **Configurable Field 1** follows the employee name and has a larger font size than the other configurable fields. **Configurable Field 1** has its own line above **Configurable Field 2** and **Configurable Field 3**. The following table shows which fields can be chosen:

Configurable Fields	Standard Fields	Custom Field Types
Configurable Field 1	Job Title	Free-Form Text List/Record
Configurable Fields 2 & 3	Subsidiary Location Department Sales Role Type	Free-Form Text List/Record



**Note:** For standard fields such as Subsidiary and Sales Role to appear, enable the appropriate features.

## To configure the employee directory and org chart:

1. Go to Setup > Employee Directory/Org Browser > Preferences.
2. To use the Employee Directory, check the **Enable Employee Directory** box.
  - a. The Directory Layout section shows visible fields in the Employee Directory. Select the field you want to appear under the employee name and title from the **Configurable Field 1** and **Configurable Field 2** lists.
  - b. Select the fields you want to appear on the right-hand side of the directory listing from the **Configurable Field 3** and **Configurable Field 4** lists.
3. To use the Org Browser, check the **Enable Org Browser (Org Chart)** box.
  - a. The Org Browser Layout sections shows visible fields in the Org Browser. Select the three additional fields you want to display from the **Configurable Field 1**, **Configurable Field 2**, and **Configurable Field 3** lists.
  - b. Under Org Browser Top-Level Employees, click the arrow in the **Employee** field. On the list, select the names of one or more employees who you want to show at the top of the Org Browser.

4. Under Directory and Org Browser Filters, select the saved search you want to use to filter employees out of the directory and org browser. To revert to the saved search that was included by default with the Employee Directory SuiteApp, select **Employee Directory (Default)** from the **Saved Search** list. For more information, see the help topic [Saved Searches](#).



**Important:** Ensure that the saved search does not filter standard criteria according to the information on the user's record. Specifically, avoid filtering standard criteria such as **Class**, **Department**, **Location**, **Subsidiary**, and others and according to **- Mine - or - Mine and Descendants -**. These restrictions also apply to **User Field...** criteria that you can filter according to **Class**, **Department**, **Location**, **Subsidiary**, and others.

5. Click **Save**.

## Updating Required Scripts for the Employee Directory and Org Browser

You must update the Employee Directory and Org Browser scripts to work with the custom roles that will use the SuiteApp.

Script ID	Script
customdeploy_ed_emp_dir_su	Employee Directory
customdeploy_ed_emp_search_backend_su	ED Employee Search Backend Su
customdeploy_ob_org_browser_su	Org Browser UI Su
customdeploy_ob_org_browser_backend_su	Org Browser Backend Su

### To update the required scripts for the Employee Directory and Org Browser:

1. Go to Customization > Scripting > Script Deployments.
2. Locate a required script based on the table on this page. Click **Edit**.
3. On the **Audience** subtab, go to the **Roles** field.
4. Select the roles that will use the SuiteApp. To select all roles, check the **Select All** box.
5. Click **Save**.
6. Repeat steps 2 to 5 for each required script.

## Using the Employee Directory

You use the employee directory to search for employees by name, location, department, job title, or (with NetSuite OneWorld accounts) subsidiaries. After performing the search, you can filter your results further by all of these categories.

### Employee Directory

#### To use the employee directory:

1. From your Employee Center role, go to My Company > Employee Directory.
2. On the Employee Directory page, type the string that you want to search. As you type, the search field shows employees who match your search term in their name, location, department, job title, or (NetSuite OneWorld) subsidiary. The more characters you type, the more narrowed the search becomes.
3. To search for employees who have your search string in their location, department, job title, or subsidiary, click the appropriate link in the search field.
4. If you see the person you are searching for in search field, click their name.
5. To perform a full search, press Enter or click **Search**.
6. The Employee Directory page shows a list of employees who match your search term.
7. To view an employee in the org browser, click **View In Org Browser** on the right side of the employee entry.

For more information about the org browser, see [Using the Org Browser](#).

## Filter Search Results

### To filter your search results:

1. If the search returned a large number of results and you want to narrow the results, click **Filters** to open the filter pane.
2. To apply a filter (that is, view only employees with particular characteristics), check the appropriate box under **Locations**, **Departments**, **Job Titles**, or **Subsidiaries**.
3. By default, the filters pane lists up to five entries for each category, ranked by the number of employees that match in each entry. To add another filter under a category, click **Add** and begin typing until you see the entry you want to use.
4. Below the filter area, the filters that you have applied appear. To remove a filter, clear the appropriate box or click the close button on the applied filter.



**Important:** The Kudos feature requires SuitePeople HR. An administrator must enable it for your account. For more information, see [Kudos](#).

## Give Kudos from the Employee Directory

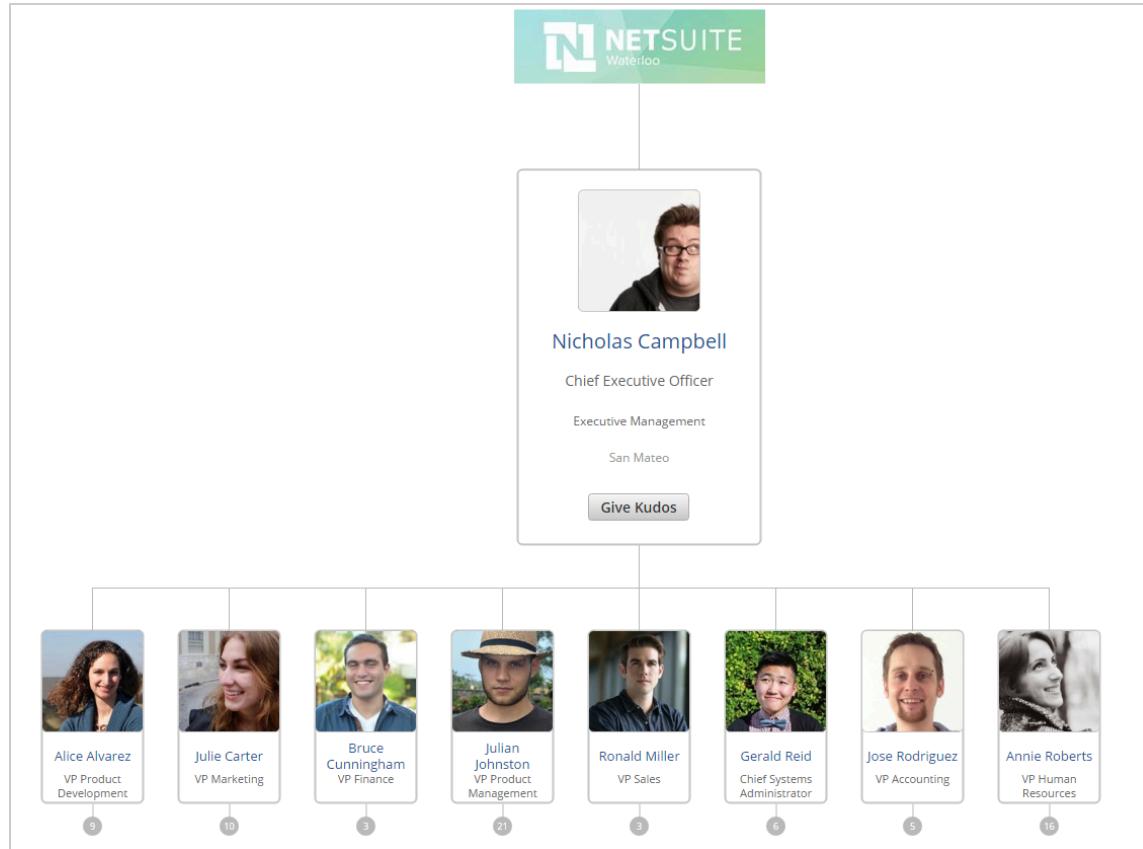
### To give Kudos from the employee directory:

1. On the Employee Directory page, search for the person you want to give Kudos to.
2. Click **Give Kudos** on the right side of the employee entry.
3. Optionally, you can add names to give Kudos to more than one coworker at a time. Begin by typing another coworker's name. As you type, suggested names appear that match what you have typed. Click the name to add the person.
4. In the text field, type a description for the Kudos that explains why you want to recognize your coworker(s).
5. Under Supported Values, click one or more organizational values that this Kudos demonstrates. When you hover over a values icon, a description of that value appears.
6. Click **Give Kudos**.

# Using the Org Browser

The Org Browser provides an intuitive, interactive, and graphic method of viewing your organizational chart, and the supervisors and direct reports of fellow employees. You can also use the employee directory to locate employees. For more information, see [Using the Employee Directory](#).

To begin, from your Employee Center role, under My Company, click Org Browser. The Org Browser page appears showing a tree structure graphic depicting your organization's hierarchy. It is centered on the person at the top of your organization, such as your president or chief executive officer. On each person's card, below their name, their job title and other configurable information appears.



You can go around the org browser in the following ways:

- To center the org browser on any person, click that person's card.
- Underneath that person's card, you see the people who report directly to them.
- You can also center on a person by typing their name in the search field.
- To zoom in or out on the org browser, use the scroll button on your mouse or click the zooming tool on the left side.
- To move around the org browser, click and drag in the direction that you want to move.
- For employees who are not centered in your view, a number below their cards shows the number of people they have reporting directly to them.
- If you view an employee lower down in your company's hierarchy, their direct manager is replaced on the org browser by a number. That number shows the number of levels of management above them. When you hover over that number, the reporting relationship up to the top of your organization appears.

- To download a copy of your current view of the org browser, click **Download** beside the search field.
- To find a person by name, start typing their name in the **Find people by name** field.



**Important:** The Kudos feature requires SuitePeople HR, and an Administrator must enable it for your account. For more information, see [Kudos](#).

### To give Kudos from the Org Browser:

1. On the Org Browser page, locate the person you want to give Kudos to, and click their card to center them.
2. Click **Give Kudos** on their card.
3. Begin typing a coworker's name. As you type, suggested names appear that match what you have typed.
4. If you want to give Kudos to more than one coworker at a time, keep adding names.
5. In the text field, type a description for the Kudos that explains why you want to recognize your coworker(s).
6. Under Supported Values, click one or more organizational values that this Kudos demonstrates. When you hover over a values icon, a description of that value appears.
7. Click **Give Kudos**.

# Employee Center Management

The Employee Center is a role designed for regular employees in your organization. In the Employee Center, your employees can access their information. They can submit requests (such as time-off requests and purchase orders) for approval, submit timesheets, and so on. You can manage the Employee Center to ensure that employees have access to the tools and information they need.

For information about managing the Employee Center, see the following topics:

- [About the Employee Center Role](#)
- [Employee Center Portlets](#)
- [Granting Access to the Employee Center](#)
- [Employee Center Dashboard Publishing Feature](#)
- [Working With News Items](#)

## About the Employee Center Role

When you add the Employee Center role on an employee's record, you grant the employee access to the Employee Center. From the Employee Center, employees can do the following:

- View their paycheck history, employee profile, and W-4
- Enter and view time entries. Supervisors can review and approve time entries for direct reports.
- Enter and view expense reports. Depending on how you set up approvals for expense reports, expense approvers (managers or supervisors) can review and approve expense reports.
- Enter and view purchase requests or requisitions. Depending on how you set up approvals for purchase requests or requisitions, purchase approvers (managers or supervisors) can review and approve purchase requests or requisitions.
- Enter and view activities such as tasks and phone calls
- Access their calendar
- Access documents and relationship records

With SuitePeople HR, your employees can complete additional tasks in the Employee Center:

- Request time off and view their time-off balances. Supervisors can view and approve time-off requests for their direct reports.
- Recognize the achievements of their peers with Kudos
- Browse the Org Chart and search the Employee Directory

For more information about SuitePeople, see [SuitePeople Overview](#).

The Employee Center dashboard can be customized by employees to show the information that they most need. Click **Personalize** in the upper right of the dashboard, or in the Settings portlet, click **Personalize Dashboard**. For more information about personalizing your dashboard, see the help topic [Dashboard Personalization](#).

**Note:** The dashboard cannot be customized if the lock icon (🔒) appears beside the word **Home** on the left side of the home page.

## Understanding Restrictions for Employee Center Data

The standard Employee Center role can filter purchase orders, expense reports, and time reports that employees with this role are permitted to view. Employees logging in with this role can see purchase orders, expense reports, and time reports that they own. If they supervise other employees and are listed as an approver, note the following. They can also see purchase orders, expense reports, and time reports that their employees own.

In OneWorld accounts, subsidiary restrictions are not enforced to filter time and expense report records that users with this role can see. Subsidiary restrictions are enforced to filter the records that users with this role can see, except for times reports, purchase orders, and expense reports. Subsidiary restrictions for the role are checked first, then subsidiary restrictions for the individual users.

Customized Employee Center roles built from the standard Employee Center role filter viewable records in this same manner by default.

## Purchase Approvals and Currencies

If you use the Multiple Currencies feature, note the following. When you view purchase requests and purchase orders that require approval, how currency fields are displayed depends on whether you customize the view.

### Non-customized View

- **Amount** – shows amount in base currency
- **Base Currency** – shows currency in base amount

### Customized View

- **Amount (Foreign Currency)** – shows amount in foreign currency

- **Currency** – shows foreign currency

## Employee Center Portlets

NetSuite provides portlets that employees can add to their Employee Center dashboards. Some portlets are available regardless of the features that are enabled in your organization's NetSuite account, and some portlets are feature dependent.

### Standard Portlets

The following standard portlets are included in the Employee Center regardless of the features that are enabled in your account. Some of these portlets appear the first time that you log in to the Employee Center. Other portlets are accessible from the Personalize Dashboard palette.

Portlet	Description
Calendar	<p>Lists activities for a selected period ordered by date and time, with links to drill down into individual activity records.</p> <p>In the portlet, you can select between a daily, weekly, monthly, or agenda view. You can choose to display your own calendar or a public calendar for another entity within the organization.</p> <p>Click the <b>Set Up</b> menu option to display a popup where you can define the types of activities to display in the calendar.</p>
Custom Search	<p>You can display up to six on the Home page. If you have access to the Manager tab, you can display up to two on that tab.</p> <p>Shows results from a saved search.</p> <p>In the portlet, click <b>Set Up</b> to select the saved search, and specify a custom title for the portlet. You can specify the number of results to display, and whether to drill down into search results in the portlet, or on a new page. If you use the Inline Editing feature, you can specify whether to enable inline editing of search results.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <span style="color: #0070C0; font-size: 1.5em; margin-right: 5px;">i</span> <b>Note:</b> When placed in the right or left columns of a dashboard, custom search portlets display only the first four results columns of the saved search. When placed in the center column, they display the first nine results columns. Custom search portlets also include New, Edit, and View columns with links for each result record.       </div>
Employee Center — Home Links	<p>Provides links to different records within your Employee Center, such as documents, contacts, and timesheets.</p>
List	<p>Shows a list of records of a selected type, with links to view, and, if you have permission, to edit individual records. Shows nine columns when placed in the center column of the dashboard. Shows four columns when placed in the right or left column.</p> <p>In the portlet, click <b>Set Up</b> to select a type of record and the number of records shown.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <span style="color: #0070C0; font-size: 1.5em; margin-right: 5px;">i</span> <b>Note:</b> On some tabs, the available List portlets are configured to show predefined types of records. For example, the Activities page offers Tasks and Phone Calls list portlets.       </div>
Quick Search	<p>Shows a form where you can quickly search for records of a selected type, using one selected filter field and entered keywords.</p> <p>Click <b>Set Up</b> to define the type of records to search. Then, enter keywords in the portlet's text box and select a field name from the Search For list.</p>

Portlet	Description
RSS/Atom Feed	<p>You can display up to two.</p> <p>Shows RSS or Atom feed URL content, from an external website or HTML document.</p> <p>In the portlet, click <b>Set Up</b> to select display options and a URL. NetSuite provides a number of standard RSS feed URLs, or you can choose Custom and enter another URL.</p>
Recent Records	<p>Shows a list of records that you have recently created, modified, or viewed.</p> <p>In the portlet, click the record to view it. If you have permission, an Edit link is also available. You can click it to open the record in edit mode.</p>
Recent Reports	<p>(Available on the Reports tabbed page.)</p> <p>Shows a list of reports that you have recently created, modified, or viewed.</p> <p>In the portlet, click the report name to view the individual report.</p>
Reminders	<p>Shows important tasks of selected types, usually that are past due or soon due to be completed.</p> <p>In the portlet, click <b>Set Up</b> to select types of reminders and to define the number of days in advance that reminders should be shown. Click on a reminder to go to the page where you need to take an action.</p>
Report Snapshots	<p>(Can display up to 10.)</p> <p>Each added portlet provides a graphical or list summary of a selected standard or custom report's data, with a link to view the underlying report.</p> <p>In the portlet, you can select a date range for data and click thumbnails to choose among chart types for graphical data. Click <b>Set Up</b> to select the type of display and other layout options, including chart themes. Click menu options to print the report snapshot chart, download it to a PNG, JPG, PDF, or SVG file, or view the underlying report results.</p> <p>When the report snapshot portlet is in the left or right dashboard column, the list text truncates at 25 characters. To avoid this truncation, place the portlet in the middle column.</p> <p>Report snapshot list amounts are rounded to the nearest whole number and do not display decimal places.</p>
Search Form	<p>Shows a form to search for records of a selected type. Filter fields are based on system-defined defaults or a custom search form that you defined as preferred.</p> <p>In the portlet, click <b>Set Up</b> to select the search form to be used. Click <b>Full Search</b> to switch to the default search page for the selected record type. Click <b>Edit</b> to open the definitions page for the selected search form and make edits.</p>
Settings	<p>Shows links to user-level setup tasks.</p> <p><b>Important:</b> The contents of this portlet are system-defined. This portlet cannot be removed or modified.</p>
Shortcuts	<p>Shows links to selected pages, so you can navigate quickly to frequently used pages.</p> <p>Click <b>Set Up</b> to reorder the listing of existing shortcut links. Click <b>New Shortcut</b> to add a shortcut if you know the URL of the page. If you do not know the URL, go to that page. Then, click More &gt; Add to Shortcuts in the upper right corner of that page.</p>
Tasks	<p>Shows a list of upcoming CRM tasks assigned to you, with links to view, and if you have permission, to edit, individual records.</p> <p>In the portlet, select a view and a sorting method, and click <b>Set Up</b> to define the number of tasks shown.</p>

Portlet	Description
Trend Graphs	<p>(Can display up to five.)</p> <p>Shows a chart of key performance indicator (KPI) data with a time-based X axis.</p> <p>In the portlet, click thumbnails to choose among different chart types. You also can change the graph's X axis scale by selecting different time intervals from the list. Click <b>Set Up</b> to select a KPI to be graphed and layout options, including chart themes. You also can click menu options to print the trend graph chart or download it as a PNG, JPG, PDF, or SVG file.</p>

## Feature-Dependent Portlets

The following portlets are available for the Employee Center dashboard only if certain features are enabled in your account.

Portlet	Description	Required Feature
Expense Reports	<p>Shows you the status of up to five of your latest submitted expense reports. You can also click the <b>Enter Expense Report</b> button to enter new expense reports. Links to your expense reports are not available from the Home Links portlet.</p>	Expense Reports
Goals	<p>Shows actions to take on goals and an overview of goals that are in progress. On the Employee dashboard, the portlet shows your goals that are starting soon, due soon, and overdue. Employees can also view the progress and time elapsed for their top three goals in progress.</p> <p>On the Manager dashboard, the portlet shows your direct reports' goals that require approval or reflection and goals that are overdue. Managers can also view the progress and time elapsed for their direct reports' goals in progress. For more information, see <a href="#">Viewing Goals in the Goals Portlet</a>.</p>	Performance Management
Kudos	<p>Enables you to give Kudos to your coworkers to recognize a job well done. You can also view the other Kudos given in your company.</p>	Kudos
My Team	<p>Displays a list of your direct reports, if you are a manager. This portlet appears on the Manager view of your Employee Center dashboard.</p> <p>If you enable the Employee Change Requests feature, managers can create employee change requests for their direct reports from the My Team portlet. For more information, see <a href="#">Employee Change Requests in the Employee Center</a>.</p>	Employee Center Dashboard Publishing
News Items	Enables you to share company news with your employees.	Employee Center Dashboard Publishing
Payroll	Shows you the status of your last five paychecks, and allows you to view your Form W-4 information. Paycheck amounts are hidden by default. You can view paycheck amounts by clicking the eye icon. You can not access your paycheck history and Form W-4 information from the Home Links portlet.	Payroll
Purchases	Shows you the status of up to five of your latest submitted purchase requests or requisitions. You can click the <b>Enter Purchase Request</b> button or the <b>Enter Requisition</b> button to enter new purchase requests or requisition. Links to your purchase requests or requisitions are not available from the Home Links portlet.	Purchases or Requisitions
Time-Off	Provides a quick view of the time off you have for the rest of the year. It also provides the time off that you have taken, and the time off that you have booked. You can also click <b>Book Time-Off</b> to schedule more time off.	Time-Off Management

# Granting Access to the Employee Center

Use the following procedure to assign the Employee Center role to an employee.

## To assign the Employee Center role to an employee:

1. Go to Lists > Employees > Employees.
2. Next to the name of the employee to whom you want to assign the Employee Center role, click **Edit**.
3. Under Email | Phone | Address, enter an email address, if one has not already been entered.
4. Click the **Access** subtab.
5. Complete all access-related fields. For more information, see [Giving an Employee Access to NetSuite](#).
6. In the **Role** field, select **Employee Center**.
7. Click **Add**.
8. Click **Save**.



**Note:** Employees with Administrator roles in addition to Employee Center access do not count against your Employee Center licenses. If you remove an employee's Administrator role, the employee counts against your Employee Center licenses. To purchase additional licenses, contact your account representative.

# Employee Center Dashboard Publishing Feature

The Employee Center Dashboard Publishing feature includes the following:

- **Employee Center Publishing global permission** – Users with this global permission can publish a standard Employee Center dashboard for all Employee Center users. All Employee Center users see the same layout and the same portlets when they log in to NetSuite with their Employee Center role.
- **News Item record and permission** – Users who are assigned roles that include the News Items permission can create News Item records. News items appear on the Company News portlet on the Employee Center dashboard. For more information, see [Working With News Items](#).
- **Manager dashboards in the Employee Center** – Employee Center users who are supervisors or managers have two dashboards in the Employee Center:
  - An Employee dashboard, where they can book time off for themselves, enter their own expense reports, keep track of contacts, and so on.
  - A Manager dashboard, where they can see information about and approve requests from their direct reports.

More information about the Manager dashboard is available in the Employee Center help.

For information on enabling features, see the help topic [Enabling Features](#).



**Note:** The Employee Center Dashboard Publishing feature is only available for accounts with SuitePeople HR provisioned. For more information, see [SuitePeople Overview](#).



**Important:** After you enable the Employee Center Dashboard Publishing feature, any Employee Center dashboards that individual employees previously customized are replaced with a default dashboard. This dashboard can be edited only by users with the Employee Center Publishing global permission. If you disable the Employee Center Dashboard Publishing feature, previous versions of the Employee Center dashboard are restored.

## The Employee Center Publishing Permission

When you enable the Employee Center Dashboard Publishing feature, the Global Permissions feature is also enabled. This is true unless it is already enabled. For more information, see the help topic [Using the Global Permissions Feature](#). To use the publishing tool, you must assign the Employee Center Publishing global permission to a user. This user can then publish the Employee Center dashboard from the Employee Center role. Other users cannot customize their own dashboards, and a lock icon ( ) appears on the dashboard. For more information about publishing the Employee Center dashboard, in the Employee Center help, see the section "Customizing the Employee Center for Your Organization".

### To assign the Employee Center Publishing permission to a user:

1. Go to Lists > Employees > Employees.
2. Beside the employee who is responsible for publishing the Employee Center dashboard, click **Edit**.
3. Click the **Access** subtab.
4. On the **Roles** subtab, verify that the employee is assigned the Employee Center role.

This screenshot shows the 'Roles' subtab of the Employee edit screen. The 'Employee Center' role is selected in the dropdown menu. Below the dropdown are four buttons: 'Add', 'Cancel', 'Insert', and 'Remove'. The 'Add' button is highlighted.

5. On the **Global Permissions** subtab, from the **Permission** list, select **Employee Center Publishing**, and then click **Add**.

This screenshot shows the 'Global Permissions' subtab of the Employee edit screen. A new row is present in the table, showing 'Employee Center Publishing' under 'Permission' and 'Full' under 'Level'. Below the table are four buttons: 'Add', 'Cancel', 'Insert', and 'Remove'. The 'Add' button is highlighted.

6. Click **Save**.

When this employee uses the Employee Center role, the Edit Dashboard button appears on the Employee Center home page.



**Warning:** Only use the Global Permissions feature to assign permissions to employees.

## Working With News Items

To share company news with your employees, you can create news items that appear on the Company News portlet in the Employee Center. If you have multiple locations set up for your company, you can

create news items that appear for employees in specific locations. You can also create news items that appear for only managers. Managers can find manager-specific news on the Manager dashboard in the Employee Center.

## Prerequisites

To create news items, the Employee Center Dashboard Publishing feature must be enabled in your NetSuite account. For more information about the Employee Center Publishing feature, see [Employee Center Dashboard Publishing Feature](#).

As well, you must be assigned a role that includes the News Item permission. By default, the News Item permission is included in the following NetSuite roles, with the full access level (view, create, edit, and delete access):

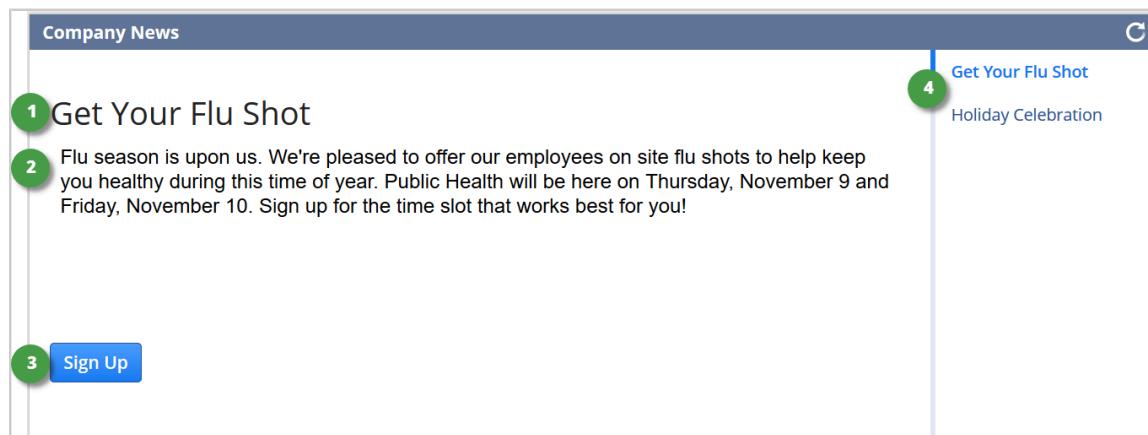
- Chief People Officer (CPO)
- Human Resources Generalist

For more information about permissions, see the help topic [NetSuite Permissions Overview](#).

## Adding News Items to the Company News Portlet

The five most recent news items appear on the Company News portlet in the Employee Center. Older news items do not appear.

The following image shows what a news item looks like in the Company News portlet:



1	The <b>headline</b> of the news item.
2	The <b>body</b> of the news item. You can format this text with different fonts, colors, and basic formatting (bold, italics, underline, numbered and ordered lists).
3	The <b>Call to Action</b> button. You can specify the text that should appear on the button and a link for the button. For example, you might want to link to a page on your company's intranet site.
4	Users can view headlines for other news items and click the headlines to read other news.

### To add news items to the Company News portlet:

1. Go to Lists > News Items > New > New.

2. In the **Headline** field, enter a headline for the news item.
3. In the **Body** field, enter the text that makes up the body of the news item.
4. Additionally, you can set the following:
  - You can include a button that users can click to learn more or perform a certain action. In the **Call to Action** field, enter the text that should appear on the button. In the **Call to Action Link** field, enter the link that opens when the user clicks the button.
  - To show this news item to only employees in a specific location, first, clear the **Available in All Locations** box. Then, in the **Locations** list, select one or more locations.



**Important:** Employees who are not associated with a location can see news items for any location. To learn how to associate an employee with a location, see [Employee Locations](#).

- To show this news item to only managers, check the **Managers Only** box.
5. Click **Save**.

#### To edit news items:

1. Go to Lists > Web Site > News Items.
2. Beside the news item that you want to edit, click **Edit**.
3. Make your changes.
4. Click **Save**.

#### To delete news items:

1. Go to Lists > Web Site > News Items.
2. Beside the news item that you want to delete, click **Edit**.
3. In the **Actions** menu, click **Delete**.

# Employee Onboarding and Offboarding Plans

Planning employee onboarding and offboarding tasks is common when you manage human resources. With the Onboarding/Offboarding Plans SuiteApp, you can facilitate smooth career movements for employees in your organization. The SuiteApp empowers you with customizable plans and templates that you can tailor for your specific business need.

For more information, see:

- [Onboarding and Offboarding Plans Overview](#)
- [Setting Up Onboarding and Offboarding Plans](#)
- [Getting Started With Onboarding and Offboarding Plans](#)
- [Working With Onboarding and Offboarding Plans](#)

## Onboarding and Offboarding Plans Overview

The Onboarding/Offboarding Plans SuiteApp is a comprehensive tool for managing employee career movements in an organization. HR professionals can use it to create employee plans, use premade plan templates or create their own templates. They can also use it to receive notifications related to an employee onboarding or offboarding.

## Features and Benefits

With Onboarding/Offboarding Plans, you can:

- Save time by creating employee plan templates that you can reuse for different scenarios.
- Promote a positive onboarding and first-day experience for newly hired employees by linking tasks to points of contact.
- Ensure proper transfer and graceful transition for exiting employees by linking tasks to points of contact.
- Provide a designated list for any employee who are in the process of entering or exiting the organization.
- Keep track of the status of tasks that are required to comply with legal standards, such as the completion of government forms.
- Identify common roadblocks when completing tasks to help refine future employee career changes.

## Plan Types and Templates

Onboarding/Offboarding Plans lets you create plans appropriate to an employee career movement. You can select from different plan types depending on the purpose of the plan. Each plan type includes a premade template that populates with tasks suitable for the change.

The following table shows the available plan types and the purpose and template assigned to each.

Plan Type	Purpose	Template
Onboarding	Use this to organize the tasks of newly hired employees and transferred employees and help them start their new jobs.	Onboarding Plan Template

Plan Type	Purpose	Template
Offboarding	Use this to organize the tasks of exiting employees and ensure complete transfer.	Offboarding Plan Template

## Roles

As an HR professional, use the following standard roles to view, create, and edit plans for employees in the organization:

- Administrator
- Chief People Officer
- Human Resources Generalist

To allow a custom role to use Onboarding/Offboarding Plans, see [Granting Onboarding/Offboarding Permissions for Custom Roles](#).

When you create a plan for an employee, you can assign a Coordinator to manage the plan and Assignees to perform the tasks.

SuiteApp Role	NetSuite Role Requirement	Definition
Coordinator	Chief People Officer Human Resource Generalist Custom roles with permissions	This role lets an employee view, edit, track, or delete the plan of another employee.
Assignee	Any NetSuite role	This role lets an employee view and update the status of tasks assigned to them.

If you use any of the standard roles and access a plan that is created for you, you automatically assume an Assignee role. You can only view, update, and add notes to tasks that are assigned to you. You can view the complete list of tasks only of other employee plans.

For more information about the SuiteApp, see the following:

- [Limitations and Best Practices](#)
- [Frequently Asked Questions: Onboarding/Offboarding Plans](#)

To install and set up the SuiteApp as an Administrator, see [Setting Up Onboarding and Offboarding Plans](#).

To learn how to use the SuiteApp for your specific business need, see [Getting Started With Onboarding and Offboarding Plans](#).

To get detailed information about the tasks you can do with the SuiteApp, see [Working With Onboarding and Offboarding Plans](#).

## Limitations and Best Practices

Read this section to view the best practices and known limitations when you use Onboarding/Offboarding Plans.

## Limitations

- Currently, the Onboarding/Offboarding Plans SuiteApp supports only US and UK English languages.

- CSV import is not available for Onboarding/Offboarding Plans. You may encounter problems with formatting when you try to import lists from the SuiteApp.

## Best Practices

Follow these guidelines to maximize your use of the SuiteApp:

- When setting up the SuiteApp, remember to set the preferred form, so the plans and templates will behave properly. For more information, see [Setting Form Preferences](#).
- You should create an employee record before you create a plan. Some of the features of the SuiteApp require an employee record to work. For example, receiving email notifications, and automatically including employees and supervisors as assignees. For more information, see [Adding an Employee](#).
- If you created the employee's plan before their employee record, see [Guidelines for Associating Plans With Employee Records](#).
- Before you create an offboarding plan, ensure that you have entered a termination date on the employee record.



**Note:** If you use the Effective Dating feature, ensure that the effective date on the employee record is the current date. You can also use a date in the past. If you set the effective date to a future date, the SuiteApp cannot source the termination date on the record.

- When creating plans, ensure that you select the appropriate plan type before you continue. If you change the plan type after you have modified other fields, all data you have entered will be lost.
- When creating a plan, remember that the template field can no longer be changed after you click **Save**. Ensure that you are selecting the appropriate template before saving.
- If you need to work on existing templates, see [Guidelines for Managing Templates](#).
- For best practices when receiving email notifications, see [Receiving Email Notifications](#).

## Frequently Asked Questions: Onboarding/Offboarding Plans

Read the answers to the following questions for more information about the SuiteApp.

### How many plans and templates can I create using the SuiteApp?

There is no limit to the number of plans and templates you are allowed to create.

### Can I assign a task to multiple assignees?

Yes, you may assign a task to multiple assignees, and there is no limit to the number of assignees.

### Why can't I see the count changing on the Reminders or Onboarding portlet even after I completed a task?

Click the Refresh icon on the Reminders or Onboarding portlet to see the most recent task counts.

### Does the SuiteApp account for business days and holidays when computing due dates?

This feature is not available.

What is the time zone used in the SuiteApp?

The SuiteApp adapts the time zone indicated in the company preferences of the account.

## Setting Up Onboarding and Offboarding Plans

To set up Onboarding/Offboarding Plans, follow the steps in the table.

Step	Related Help Topic
1. Log in as a NetSuite administrator.	<a href="#">Roles and Accounts</a>
2. Complete the prerequisites.	<a href="#">Prerequisites</a>
3. Install Onboarding/Offboarding Plans.	<a href="#">Installing the SuiteApp</a>
4. Grant permissions for custom roles to use Onboarding/Offboarding Plans.	<a href="#">Granting Onboarding/Offboarding Permissions for Custom Roles</a>
5. Set the preferred Onboarding/Offboarding Plans form for custom roles.	<a href="#">Setting Form Preferences</a>
6. Set up your account for Onboarding/Offboarding Plans updates.	<a href="#">Updates Preferences</a>
7. Set up the Onboarding portlet.	<a href="#">Setting Up the Onboarding Portlet</a>

## Prerequisites

To use Onboarding/Offboarding Plans, enable the features in the following table.

Subtab	Feature	Description
SuiteCloud	Custom Records	Helps access custom records provided by the SuiteApp.
	Client SuiteScript	Helps access the custom functions of the SuiteApp.
	Server SuiteScript	Helps run the scripts provided by the SuiteApp.

For more information, see the help topic [Enabling Features](#).

To continue setting up the SuiteApp, see [Installing the SuiteApp](#).

## Installing the SuiteApp

As an Administrator, install the Onboarding/Offboarding Plans using the following details:

- Bundle Name: Onboarding/Offboarding Plans
- Bundle ID: 244690

For more information about how to install a SuiteApp in your account, see the help topic [Installing a Bundle](#).

To continue setting up the SuiteApp, see [Granting Onboarding/Offboarding Permissions for Custom Roles](#).

## Granting Onboarding/Offboarding Permissions for Custom Roles

Standard Chief People Officer (CPO) and HR Generalist (HRG) roles receive the complete set of permissions by default. You can then create custom instances of these roles and assign them to employees to give them access to the SuiteApp.

### Onboarding/Offboarding Plans Permissions

To grant access to custom roles that were not created from standard CPO or HRG roles, you must manually add the following permissions:

Custom Record	Level	Restrict
Onboarding/Offboarding Plan	Full	-
Onboarding/Offboarding Plan Task	Full	-
Onboarding/Offboarding Template	Full	-
Onboarding/Offboarding Template Task	Full	-
Onboarding/Offboarding Task	Edit	Viewing and Editing

#### To grant permissions to a role:

1. Log in as an Administrator
2. Go to Setup > Users/Roles > User Management > Manage Roles
3. On the Manage Roles page, choose a role.
  - Click **Edit** to add permissions to a custom role.
  - Click **Customize** to create a custom role from a standard role.
4. On the Role page, look for the **Permissions** subtab. Click the **Custom Record** subtab.
5. Select a permission from the list.
6. Select the level of access and restrictions for the permission.
7. Click **Add**
8. Repeat Step 5 to 7 for each permission that you need to add.
9. Click **Save**.

### Guidelines for Granting Permissions for Custom Roles

- When the SuiteApp is upgraded or fixed, only the standard roles can receive the updates. You must manually push incoming updates to custom instances of these roles.
- If you created custom CPO and HRG roles before you installed the SuiteApp, you must manually add permissions to these custom roles.

For more information about setting permissions for a role, see the help topic [Setting Permissions](#).

## Change in Custom Scripts Using the Full Access Role



**Note:** The Full Access role has been deprecated. For more information, see the help topic [Full Access Role \(Deprecated\)](#).

Starting with Onboarding/Offboarding Plans version 1.02.1, custom scripts included in the SuiteApp run using the Administrator role. For existing users upgrading to version 1.02.1, you should update the script deployments to run as Administrator.

### To update your script deployments:

1. Go to Customization > Scripting > Script Deployments.
2. Locate the following OOP scripts and click the corresponding **Edit** link.
  - OC Assignee Task UE
  - OC Employee UE
  - OC Checklist Access Su
  - OC Checklist Su
  - OC Onboarding Checklist UE
  - OC Onboarding Template Checklist UE
3. On the **Execute as Role** list, select **Administrator**.
4. Click **Save**.

To continue setting up the SuiteApp, see [Setting Form Preferences](#).

## Setting Form Preferences

You need to set the preferred form for each custom role that you assign to users.

### To set form preferences:

1. Go to Setup > Users/Roles > Manage Roles.
2. Locate the custom role on the list. Click **Edit**.
3. On the Role page, click the **Forms** subtab.
4. Click the **Custom Record** subtab.
5. In the **Preferred** column, check the box next to **Custom Onboarding Task Form**.
6. In the **Restricted** column, check the box next to **Custom Onboarding Task Form**.
7. Click **Save**.

## Updates Preferences

Roles that use the SuiteApp can receive updates about their plans by using the Onboarding portlet, the Reminders portlet, or email notifications.

To set up the Onboarding portlet, see [Setting Up the Onboarding Portlet](#).

To set up reminders, see the help topic [Setting Up Reminders](#).

Click or drag to add the following reminders on your dashboard:

- Onboarding Tasks
- Offboarding Tasks

To ensure that email notifications work smoothly, see the following:

- Verify that any Coordinator you will assign to a plan have an email address on their employee record. The SuiteApp uses this address to send notifications to employees.
- If you want an employee to receive notifications, ensure that they have an existing employee record. Otherwise, they cannot receive updates about their assigned tasks or any plans created for them. If you must create their plan before their record, remember to update the plan to link it to the record.

## Email Summary

The SuiteApp includes a script that sends an email summary of current tasks, assignees and coordinators. You can modify the script's schedule to adhere to your organization's email policies.

### To modify the email summary script:

1. Go to Customization > Scripting > Script Deployments.
2. Under the Script column, locate OC Send Daily Summary SS. Click **Edit**.
3. On the **Status** field, select **Scheduled**.
4. Make the appropriate changes under the **Schedule** subtab. For more information, see the help topic [Scheduled Script Deployment Record](#).
5. Click **Save**.

To learn how to use the SuiteApp for your specific business need, see [Getting Started With Onboarding and Offboarding Plans](#).

## Setting Up the Onboarding Portlet

You can customize your dashboard to include an Onboarding portlet. The Onboarding portlet can show up to three tabs showing your onboarding plan, your assigned tasks and newly hired employees in your organization.

You can perform the following on the Onboarding portlet:

- Track the progress and due dates of activities on your onboarding plan
- Mark onboarding plan activities complete
- View your total number of pending assigned tasks
- Monitor tasks with approaching due dates
- Open a link to an assigned task to update its status
- View your company's recent hires
- Open a link to view a new hire's employee record or send a welcome email

## To set up your Onboarding portlet:

1. Click **Personalize** in the upper-right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **SuiteApps** tab, click the **Onboarding** icon or drag it onto the dashboard.



**Tip:** You should use the portlet in either the wide or narrow areas of the one or two column dashboard layouts. Avoid using the portlet in the narrow areas of the three column dashboard layout.

To ensure a uniform onboarding experience for employees using the Employee Center role, enable the Employee Center Dashboard Publishing feature. This feature allows you to publish a standard Employee Center dashboard for all Employee Center users in your organization. All Employee Center users see the same dashboard layout and portlets when they log in to NetSuite with their Employee Center Role. For more information, see [Employee Center Dashboard Publishing Feature](#).

To perform activities on the Onboarding portlet, see [Using the Onboarding Portlet](#).

## Getting Started With Onboarding and Offboarding Plans

Onboarding/Offboarding Plans lets you build efficient ways to manage employee career movements in your organization.

To start using the SuiteApp for your immediate business needs, see the following:

- [Accessing the SuiteApp](#)
- [Using the SuiteApp for Employee Onboarding](#)
- [Using the SuiteApp for Employee Offboarding](#)

To get detailed information about the tasks you can do with the SuiteApp, see [Working With Onboarding and Offboarding Plans](#).

## Accessing the SuiteApp

Refer to the following navigation table to access Onboarding/Offboarding Plans.

Task	Page Name	Accounting Center (CPO and HRG)	Classic Center (Administrators)
Create a new plan	Onboarding/Offboarding Plan	Payroll and HR > Lists > Onboarding/Offboarding Plan > New	Lists > Employees > Onboarding/Offboarding Plan > New
View the list of plans	Onboarding/Offboarding Plan List	Payroll and HR > Lists > Onboarding/Offboarding Plan	Lists > Employees > Onboarding/Offboarding Plan
Create a new template	Onboarding/Offboarding Template	Setup > Onboarding/Offboarding > Template > New	Setup > Onboarding/Offboarding > Template > New
View the list of templates	Onboarding/Offboarding Template List	Setup > Onboarding/Offboarding > Template	Setup > Onboarding/Offboarding > Template

For more information about using plans and templates, see [Working With Onboarding and Offboarding Plans](#).

## Using the SuiteApp for Employee Onboarding

Onboarding/Offboarding Plans lets you provide a smooth transition for newly hired employees. You can conduct onboarding activities using customized plans and templates that you can reuse.

To start using Onboarding/Offboarding Plans for employee onboarding, refer to the following table for a list of common tasks.

Task	Related Help Topic	Notes
1. Create an onboarding template or make a copy of the premade template.	<a href="#">Working With Templates</a>	Template: Onboarding Plan Template
2. Create an onboarding plan.	<a href="#">Creating Plans</a>	Plan Type: Onboarding
3. Manage the onboarding plan.	<a href="#">Managing Plans</a>	-
4. Track updates.	<a href="#">Updates Preferences</a> <a href="#">Working With Updates</a>	Reminders portlet: Onboarding Tasks

## Using the SuiteApp for Employee Offboarding

Onboarding/Offboarding Plans lets you conduct a graceful transition for exiting employees. You can conduct offboarding activities using customized plans and templates that you can reuse.

## Guidelines for Using the SuiteApp for Employee Offboarding

- Before you create an employee's offboarding plan, create an employee record first. You cannot create an offboarding plan for an employee who does not have a record.
- After you create an offboarding plan, avoid clearing the **Termination/Release Date** field on the employee record. The termination or release date is used to compute task due dates. If you delete it, you can no longer change the due dates and must delete the plan.
- If you use the Effective Dating feature, ensure that the effective date on the employee record is the current date. You can also use a date in the past. If you set the effective date to a future date, the SuiteApp cannot source the termination date on the record

To start using Onboarding/Offboarding Plans for employee offboarding, refer to the following table for a list of common tasks.

Task	Related Help Topic	Notes
1. Create an offboarding template or make a copy of the premade template.	<a href="#">Working With Templates</a>	Template: Offboarding Plan Template
2. Enter a termination date on the employee record.	<a href="#">Employee Termination</a>	-
3. Create an offboarding plan.	<a href="#">Creating Plans</a>	Plan Type: Offboarding
4. Manage the offboarding plan.	<a href="#">Managing Plans</a>	-
5. Track updates.	<a href="#">Updates Preferences</a> <a href="#">Working With Updates</a>	Reminders portlet: Offboarding Tasks

# Working With Onboarding and Offboarding Plans

Onboarding/Offboarding Plans lets you manage templates, plans, and updates to ensure smooth employee career movements.

For more information about working with Onboarding/Offboarding Plans, see the following:

- [Working With Templates](#)
- [Working With Plans](#)
- [Using the Onboarding Portlet](#)
- [Working With Updates](#)

## Working With Templates

Onboarding/Offboarding Plans lets you create your own templates or pattern templates out of premade ones. Templates are used when creating plans.

To start, see:

- [Working With Premade Templates](#)
- [Creating Templates](#)
- [Managing Templates](#)

## Working With Premade Templates

You can use a premade template as a pattern for templates that you want to create. Each template includes tasks appropriate to the plan type.



**Note:** Remember to only make copies of premade templates when you create your own template. Avoid editing a premade template. If you do, SuiteApp upgrades may overwrite your changes.

The SuiteApp includes the following templates:

- Onboarding Plan Template
- Offboarding Plan Template

### To create a template from a premade template:

1. Go to the Onboarding/Offboarding Template List page. For instructions, see [Accessing the SuiteApp](#).
2. On the page, choose a premade template. Click **View**.



**Note:** Do not click **Edit**. If you do, SuiteApp upgrades may overwrite your changes.

3. On the template page, point to the **Actions** list. Click **Make Copy**.
4. On the Onboarding/Offboarding Template page, click the **Template Name** field. A list of tasks will appear under the **Tasks** subtab. The **Plan Type** and **Due Date Basis** fields are already populated with the appropriate entries.



**Note:** The **Due Date Basis** field is populated according to plan type. For onboarding plans, it displays **Hire Date**. For offboarding plans, it displays **Termination Date**.

5. In the **Template Name** field, enter a new name with a maximum of 300 characters.
6. In the **Custom Welcome Message and Email Content** text box, retain or edit the message. The text you enter appears in the Onboarding portlet, welcome page of the Onboarding plan, and is sent as an email notification to the employee.



**Tip:** The [firstname] placeholder autofills with the employee's first name sourced from the employee record.

7. On the **Tasks** subtab, you may retain or update the existing values for each task.

Column	Notes
Task Name	Retain the name of the task or enter a new name with a maximum of 300 characters.
Task Description	Retain the description of the task or enter a new one with a maximum of 100 characters.
Required	Check the box if you need your assignees to complete the task.
Days from Due Date Basis	<p>This column works with the <b>Due Date Basis</b> field on the header section. Enter data based on when the task must be finished.</p> <ul style="list-style-type: none"> <li>■ <b>Before the due date basis</b> – Enter a minus sign (-) and the number of days.</li> <li>■ On the same day as due date basis – Enter zero (0).</li> <li>■ <b>After the due date basis</b> – Enter the number of days.</li> <li>■ No defined due date – Leave blank.</li> </ul> <p>The following lists some examples of tasks and the appropriate entries:</p> <ul style="list-style-type: none"> <li>■ Order a computer 14 days before the hire date – Enter <b>-14</b>.</li> <li>■ Introduce the new hire on their hire date – Enter <b>0</b>.</li> <li>■ Complete profile five days after the hire date – Enter <b>5</b>.</li> <li>■ Submit an optional document – Leave blank.</li> </ul>
Assigned To	<p>If you want the task to be assigned to a specific employee for all plans that are created using this template, select the employee. Otherwise, leave it blank. You can fill out the column later when you create a plan for an employee.</p> <p>To select assignees, click the double arrows. On the popup window, select assignees from employee lists or search for their names.</p>
Include Supervisor as Assignee?	Check the box if you want the supervisor to be included as an assignee. When you use the template to create an employee's plan, the <b>Assigned To</b> column will automatically include their supervisor.
Include Employee as Assignee?	Check the box if you want the employee to be included as an assignee. When you use the template to create an employee's plan, the <b>Assigned To</b> column will automatically include their name.
Task URL	If a task requires the employee to access a site, append a URL with a maximum of 999 characters on this field. The task name will appear as a link in the assignee's plan. This is especially helpful if the task involves other pages in the NetSuite application.

8. To add tasks, go to the bottom of the task list. On the blank field, enter the task details. Click **Add**.
9. Click **Save**.

After you save the template, you can find it in the list of all templates. For more information, see [Accessing the SuiteApp](#).

If you want to create a plan from the template you created, see [Creating Plans](#).

## Creating Templates

Onboarding/Offboarding Plans lets you create templates that are customized for your business needs.

### To create a template:

1. Go to the Onboarding/Offboarding Template page. For instructions, see [Accessing the SuiteApp](#).
2. Enter a name in the required **Template Name** field. Choose descriptive or specific keywords. You can enter a maximum of 300 characters in this field.
3. In the **Plan Type** field, select the appropriate type. This field is set to **Onboarding** by default.
4. The **Due Date Basis** field populates with the date that matches the plan type. For onboarding, it displays **Hire Date**. For offboarding, it displays **Termination Date**. This field works in conjunction with the **Days from Due Date Basis** column to determine the due date of each task.
5. In the **Custom Welcome Message and Email Content** text box, retain or edit the message. The text you enter appears in the Onboarding portlet, welcome page of the Onboarding plan, and is sent as an email notification to the employee.



**Tip:** The [firstname] placeholder autofills with the employee's first name sourced from the employee record.

6. On the **Tasks** subtab, enter the details of your task.

Column	Notes
Task Name	Enter a maximum of 300 characters for the name of your task.
Task Description	Enter a maximum of 100 characters for the description of your task.
Required	Check the box if you need your assignees to complete the task.
Days from Due Date Basis	<p>This column works with the <b>Due Date Basis</b> field on the header section. Enter data based on when the task must be finished.</p> <ul style="list-style-type: none"> <li>■ <b>Before the due date basis</b> – Enter a minus sign (-) and the number of days.</li> <li>■ On the same day as due date basis – Enter zero (0).</li> <li>■ <b>After the due date basis</b> – Enter the number of days.</li> <li>■ No defined due date – Leave blank.</li> </ul> <p>The following lists some examples of tasks and the appropriate entries:</p> <ul style="list-style-type: none"> <li>■ Order a computer 14 days before the hire date – Enter <b>-14</b>.</li> <li>■ Introduce the new hire on their hire date – Enter <b>0</b>.</li> <li>■ Complete profile five days after the hire date – Enter <b>5</b>.</li> <li>■ Submit an optional document – Leave blank.</li> </ul>
Assigned To	<p>If you want the task to be assigned to a specific employee for all plans that are created using this template, select the employee. Otherwise, leave it blank. You can fill out the column later when you create a plan for an employee.</p> <p>To select assignees, click the double arrows. On the popup window, select assignees from employee lists or search for their names.</p>
Include Supervisor as Assignee?	Check the box if you want the supervisor to be included as an assignee. When you use the template to create an employee's plan, the <b>Assigned To</b> column will automatically include their supervisor.

Column	Notes
Include Employee as Assignee?	Check the box if you want the employee to be included as an assignee. When you use the template to create an employee's plan, the <b>Assigned To</b> column will automatically include their name.
Task URL	If a task requires the employee to access a site, append a URL with a maximum of 999 characters on this field. The task name will appear as a link in the assignee's plan. This is especially helpful if the task involves other pages in the NetSuite application.

7. After you complete the task details, click **Add**.
8. Repeat step 6 for each task you need to add.
9. Click **Save**.

After you save the template, you can find it in the list of all templates. For more information, see [Accessing the SuiteApp](#).

If you want to create a plan from the template you created, see [Creating Plans](#).

## Managing Templates

Onboarding/Offboarding Plans lets you edit, deactivate, or delete an existing template.

### Guidelines for Managing Templates

- When you change a template after it was associated with a plan, your changes apply only to future plans that are created with that template.
- You can not delete a template if it is being used by a plan. Delete the plan that is using the template first before you delete the template.
- To avoid using a specific template but are unable to delete all plans associated with it, you can mark the template as inactive. After a template is marked as inactive, it cannot be associated with future plans.

#### To manage a template:

1. Go to the Onboarding/Offboarding Template List page. For instructions, see [Accessing the SuiteApp](#).
2. Locate the template name. Click **Edit**.
3. Choose the task you want from the following table.

Task	Instructions
Edit the template	Edit the fields and columns.
Inactivate the template	Check the <b>Inactive</b> box.
Delete the template	Point to the Actions list. Click <b>Delete</b> .

4. Click **Save**.

## Working With Plans

After you install Onboarding/Offboarding Plans, you can already create a plan by using a premade template. You can also create your own template that you can use to create plans.

To start, see:

- [Creating Plans](#)
- [Managing Plans](#)

## Creating Plans

Onboarding/Offboarding Plans lets you create a dedicated plan for an employee's career movement in the organization. When you create a plan, you can choose to use an existing template to populate tasks or create a new list of tasks.



**Important:** Before you create an employee's offboarding plan, create an employee record first. You cannot create an offboarding plan for an employee who does not have a record.

### To create a plan:

1. Go to the Onboarding/Offboarding Plan page. For instructions, see [Accessing the SuiteApp](#).
2. In the **Plan Type** field, select the appropriate type.

This field is set to **Onboarding** by default.

The plan type determines the templates that you can select on the **Template** field. For more information, see [Plan Types and Templates](#).



**Note:** Ensure that you select the appropriate plan type before you continue. If you change the plan type after you modify other fields, all data you entered is lost.

3. Complete the values for the fields in the table.
  - If you are creating an onboarding plan, enter values depending on whether an employee record is available or not.
  - The welcome message and email from an onboarding plan template will only work with employees that have existing employee records. The employee record must have a name and email address.
  - If you are creating an offboarding plan, enter values according to the instructions in the Employee record is available column.

Field	Employee record is available	Employee record is not available
Employee Name	No action needed. The value is sourced from the employee record. If the record is deleted, this field is set to blank.	Enter the name of the employee.
Employee Record	Enter a name or click the double down arrows to select the employee.	Leave the field blank.
Hire Date	No action needed. The value is sourced from the employee record. If the record is deleted, this field is set to blank.  The employee record must contain a hire date before you can select a template from the <b>Template</b> field.	Enter the date when the employee starts to work in the organization.  If you plan to select an onboarding template from the <b>Template</b> field, ensure that this field contains a value.
Termination Date (for offboarding plans)	No action needed. Value is sourced from the employee record.	For offboarding plans, you cannot enter information on the field.

Field	Employee record is available	Employee record is not available
	<p><b>Note:</b> If you use the Effective Dating feature, ensure the effective date on the employee record is the current date or a date in the past. If you set the effective date to a future date, the SuiteApp cannot source the termination date on the record.</p>	
Supervisor	No action needed. The value is sourced from the employee record. If the record is deleted, this field is set to blank.	Enter a name or click the double down arrows to select the supervisor.
Location	No action needed. The value is sourced from the employee record. If the record is deleted, this field is set to blank.	Select the location where the employee is assigned to work.

**Note:** When the employee record becomes available, the coordinator can edit the plan to associate it with the record. Before you do, see [Guidelines for Associating Plans With Employee Records](#).

- From the **Plan Status** list, select the status of the plan.

Plan Status	Description	Notes
Not Started	This plan status applies if all task statuses are set to <b>Not Started</b> . All new plans are set to this status by default.	The plan status changes back from <b>In Progress</b> to <b>Not Started</b> if one or more task statuses is set to blank then to <b>Not Started</b> .
In Progress	This plan status applies if one or more task statuses are set to <b>In Progress</b> or <b>Completed</b> . This status only applies if not all task statuses are set to Completed.  The plan status applies if one or more task statuses in a newly created plan is set to blank then to <b>Not Started</b> .	The plan status changes back from <b>Completed</b> to <b>In Progress</b> if one or more task statuses are updated to <b>Not Started</b> or <b>In Progress</b> .
Completed	This plan status applies if all task statuses are set to <b>Completed</b> .  The Coordinator of a plan can set the plan status to <b>Completed</b> even if the tasks have not been marked complete.	The plan status changes from <b>In Progress</b> to <b>Completed</b> based on the following. If one or more tasks that are set to <b>Not Started</b> or <b>In Progress</b> are deleted and all other tasks are set to <b>Completed</b> .

- From the **Coordinator** list, select the name of the employee who will manage the plan. The Coordinator can view, edit, and create tasks on the plan. For more information, see [Managing Plans as a Coordinator](#).
- If you plan to select a value from the **Template** list, verify the following:
  - If you are creating an onboarding plan, ensure that the **Hire Date** field is not blank.
  - For onboarding plans, employee records with a name and an email address must be available. This ensures the welcome message and email are displayed and sent correctly.
  - If you are creating an offboarding plan, ensure that the **Termination Date** field is not blank.
 The tasks in the template will appear on the **Tasks** subtab
- Complete the details of the tasks:
  - If you used a template and want to change the details of the tasks, use the table as a guide.
  - If you did not use a template and need to add new tasks, enter the values based on the table. Click **Add**.

Column	Guideline
Task Name	Enter a maximum of 300 characters for the name of your task.
Task Description	Enter a maximum of 100 characters for the description of the task.
Required	Check the box if you need your assignees to complete the task.
Due Date	If you used a template, the populated tasks will already contain due dates. If you are adding a new task, enter or select the date.  <b>Note:</b> If you later associate an employee record with an existing plan, the hire date may change. Consequently, the due dates for all tasks may adjust to accommodate the difference between the two hire dates.
Assigned To	Click the double arrows. On the popup window, select assignees from employee lists or search for their names.
Task Status	Select the status of the plan. This field is set to <b>Not Started</b> by default.
Marked Complete By	Leave this field blank. It is automatically populated with the name of the employee who changes the status to <b>Completed</b> .
Notes	Enter a maximum of 300 characters for information that are relevant to the task.
Task URL	If a task requires the employee to access a site, append a URL with a maximum of 999 characters on this field. The task name will appear as a link in the assignee's plan. This is especially helpful if the task involves other pages in NetSuite.

8. Click **Save**.

## Guidelines for Associating Plans With Employee Records

If you must associate an employee record to an existing plan for an employee, remember the following:

- Ensure that the record includes a name, an email address and a hire date.
- If the record contains a hire date that is different from the hire date on the plan, note the following. The due dates for all tasks adjusts to accommodate the difference between the two hire dates. The following table shows a sample calculation for due dates if hire dates are changed manually or are associated with an employee record.

	Before Associating with Record	After Associating with Record
Hire Date	October 1, 2019	October 6, 2019
Task Due Before the Hire Date	September 17, 2019	September 22, 2019
Task Due After the Hire Date	October 6, 2019	October 11, 2019

- When you change the hire date of employees on their record, the hire date and due dates on the plan may also change.
- When you delete an employee record that is associated with an existing plan, the following sourced values are removed from the plan:
  - Employee Name
  - Hire Date
  - Supervisor
  - Location

- When due dates change, the SuiteApp sends an email notification to the employees and assignees about the update.

## Managing Plans

You can perform actions on an employee plan depending on your role as a Coordinator or an Assignee to that plan.

If you use any of the standard roles and access a plan that is created for you, you automatically assume an Assignee role. You can only view, update, and add notes to tasks that are assigned to you. You can view the complete list of tasks only of other employee plans.

To start, see:

- [Managing Plans as a Coordinator](#)
- [Managing Plans as an Assignee](#)

### Managing Plans as a Coordinator

As the Coordinator of a plan, you can perform the following:

- [Viewing or Editing Plans](#)
- [Tracking the Status of Plans](#)
- [Deleting Plans](#)

If you use any standard with complete permissions to access a plan that is created for you, you automatically assume an Assignee role. This also applies to custom roles. You can view the complete list of tasks only of other employee plans. For more information, see [Managing Plans as an Assignee](#).

#### Viewing or Editing Plans

Use the following procedure to view or edit plans.

##### To view or edit a plan:

- Go to the Onboarding/Offboarding Plan List page. For instructions, see [Accessing the SuiteApp](#).
- On the page, locate the employee's name. Choose whether to click **View** or **Edit**.
- If you click **Edit**, update the information on the plan.



**Note:** If the plan is already associated with a template, you can no longer associate it with another template. You can only select the template when you first create the plan.

- Click **Save**.

#### Tracking the Status of Plans

As a Coordinator, view and edit the progress of work done in the plan by using the **Plan Status** field.

Plan Status	Description	Notes
Not Started	This plan status applies if all task statuses are set to <b>Not Started</b> . All new plans are set to this status by default.	-

Plan Status	Description	Notes
In Progress	<p>This plan status applies if one or more task statuses are set to <b>In Progress</b> or <b>Completed</b>. This status only applies if not all task statuses are set to <b>Completed</b>.</p> <p>The plan status applies if one or more task statuses in a newly created plan is set to blank then to <b>Not Started</b>.</p>	The plan status changes back from <b>Completed</b> to <b>In Progress</b> if one or more task statuses are updated to <b>Not Started</b> or <b>In Progress</b> .
Completed	<p>This plan status applies if all task statuses are set to <b>Completed</b>.</p> <p>The Coordinator of a plan can set the plan status to <b>Completed</b> even if the tasks have not been marked complete.</p>	The plan status changes from <b>In Progress</b> to <b>Completed</b> based on the following. If one or more tasks that are set to <b>Not Started</b> or <b>In Progress</b> are deleted and all other tasks are set to <b>Completed</b> .

## Deleting Plans

### To delete a plan:

1. Go to the Onboarding/Offboarding Plan List page. For instructions, see [Accessing the SuiteApp](#).
2. On the page, locate the employee's name. Click **Edit**.
3. Point to the **Actions** list. Click **Delete**.

## Managing Plans as an Assignee

As an Assignee to a task, you can manage plans by performing the following:

- [Viewing Assigned Tasks](#)
- [Updating the Status of Tasks](#)
- [Adding Notes on Assigned Tasks](#)

If you use any of the standard roles and access a plan that is created for you, you automatically assume an Assignee role. You can only view, update, and add notes to tasks that are assigned to you. You can view the complete list of tasks only of other employee plans.

### Viewing Assigned Tasks

As an Assignee, you can view tasks through the Onboarding portlet, the Reminders portlet or email notifications.

To view tasks using the Onboarding portlet, see [Using the Onboarding Portlet](#).

By using the Reminders portlet, you receive notifications on your dashboard. With the portlet, you can view the latest count of tasks assigned to you that are set to **Not Started** or **In Progress**.

### To view assigned tasks on the Reminders portlet:

1. Go to Home.
2. On the Reminders portlet, click one of the following:
  - [Onboarding Tasks](#)
  - [Offboarding Tasks](#)



**Note:** You need to add both reminders on the portlet to receive notifications. For more information, see [Updates Preferences](#).

3. On the results page, locate the task you want to view. Click **Edit** or **View** to open the plan.

Employees and assignees automatically receive email notifications, which contain links to plans. To better understand the notifications, see [Receiving Email Notifications](#).

### Updating the Status of Tasks

You can update the status of your tasks by using the Onboarding portlet, the plan page or the Reminders portlet results page.

To update tasks using the Onboarding portlet, see [Using the Onboarding Portlet](#).



**Note:** All tasks, including required and optional tasks, need to be marked complete for the plan status to automatically set itself as **Completed**. Otherwise, the Coordinator needs to manually update the plan status. For more information, see [Managing Plans as a Coordinator](#).

#### To update the task status on the plan page:

1. On the Onboarding/Offboarding Plan page, locate the task.
2. In the **Task Status** column, select a status from the list.

Task Status	Description	Notes
Not Started	All tasks are set to this status by default.	-
In Progress	Select this status for tasks that you have started to work on.	The assignee status changes back from <b>Not Started</b> to <b>In Progress</b> if one or more task statuses are set to <b>In Progress</b> or <b>Completed</b> .
Completed	Select this status for tasks that you have accomplished.	The assignee status changes to <b>Completed</b> after you have set all task statuses to <b>Completed</b> .

3. Click **Save**.

#### To update the task status from the Reminders portlet:

1. On the Reminders portlet, click one of the following:
  - Onboarding Tasks
  - Offboarding Tasks
2. To activate inline editing, turn on the **Edit** switch.
3. Locate the task on the list. Click the status of the task to select a new status.

### Adding Notes on Assigned Tasks

As an assignee to a plan, you can enter your comments or notes for each task. These notes can be viewed and edited by the other assignees to the task.

As an employee for whom the plan was created, you can view the notes entered by the assignees.

#### To add notes on assigned tasks:

1. On the Onboarding/Offboarding Plan page, locate the task.
2. In the **Notes** column, enter your comments about the task. You can enter a maximum of 300 characters in this field.
3. Click **OK**.
4. Repeat Steps 2 to 3 to add notes to other tasks on the plan.
5. Click **Save**.

## Using the Onboarding Portlet

The Onboarding portlet is available to all roles including the Employee Center role. If you do not see the portlet on your dashboard, see [Setting Up the Onboarding Portlet](#).

 **Note:** In the Employee Center, if a lock icon appears beside the word **Home** on the dashboard and the portlet is missing, contact your administrator.

With the Onboarding portlet, you can perform activities on the following tabs:

- [My Plan](#)
- [My Tasks](#)
- [New Hires](#)

### My Plan

The My Plan tab is only available when the employee is first assigned an onboarding plan. The contents of the tab dynamically changes depending on the employee's progress.

Colored badges appear in the top left corner when a plan activity is due today, due tomorrow or overdue.

#### To complete your onboarding plan:

1. On the Onboarding portlet, select the **My Plan** tab.
  2. Depending on your progress, click **Start Onboarding** or **Continue Onboarding** to open the Onboarding Plan page.
  3. Check the box next to the task name of every task you complete.
  4. Click the **Save** button. The green progress bar extends to the right, providing a visual cue of your progress.
  5. To return to the home dashboard, click the **Back** button.
  6. Repeat steps 1 to 3 until all activities are marked complete.
- After all activities are complete, the Onboarding Plan page automatically closes and returns you to the Onboarding portlet.
7. Click on **Dismiss Plan** to hide the **My Plan** tab.

### My Tasks

The My Tasks tab is always available and shows tasks assigned to you as part of another employee's onboarding plan. Colored badges appear under the Due Date column for tasks that are due today, due tomorrow or overdue.

### To update the status of your tasks:

1. On the Onboarding portlet, select the **My Tasks** tab.
2. To open the Onboarding/Offboarding Plan page, click on a task name.
3. In the **Task Status** column, select a status from the list.

Task Status	Description	Notes
Not Started	All tasks are set to this status by default.	-
In Progress	Select this status for tasks that you have started to work on.	The assignee status changes back from <b>Not Started</b> to <b>In Progress</b> if one or more task statuses are set to <b>In Progress</b> or <b>Completed</b> .
Completed	Select this status for tasks that you have accomplished.	The assignee status changes to <b>Completed</b> after you have set all task statuses to <b>Completed</b> .

4. Click **Save**.
5. (Optional) To view a list of all your tasks, click **View All Tasks**.
6. (Optional) To view a list of all completed tasks, click **View Completed**.

## New Hires

The New Hires tab is always available and shows up to five of your organization's newest employees in the last 90 days. To view the new employee's profile, click their name. To send a welcome email, click the envelope icon beside the Say Hi! greeting on the right column. Employees with no email addresses saved on their employee records do not have the icon so you can not send them an email greeting.

## Guidelines for the Onboarding Portlet

Read these guidelines to maximize your use of the portlet:

- The portlet currently supports only one onboarding plan. After you complete and dismiss your onboarding plan, the My Plan tab is permanently hidden. If you are given a new onboarding plan, the activities on that plan will appear in the My Tasks tab.
- After you dismiss a plan, you can still view your plan using your Employee Center – Home Links. You can also view it by clicking **View Completed** in the My Tasks tab.
- All onboarding plan tasks, including required and optional activities, must be marked complete for the plan to set itself as complete.
- The My Tasks tab lists a maximum of five tasks. However, the tab shows the total number of assigned tasks beside the words My Tasks.
- After clicking a new employee's name, the employee record information available depends on your current role's permission level and restrictions.
- To send a welcome email from the New Hires tab, ensure that you have a valid email application installed in your device. Your operating system must also recognize this application as your device's default email client.

## Working With Updates

HR professionals or employees with access to the SuiteApp can receive notifications about the progress of an employee through any of the following:

- [Tracking Dashboard Reminders](#)
- [Receiving Email Notifications](#)

## Tracking Dashboard Reminders

You can set up reminders for incoming onboarding tasks by using the reminders portlet. You need to be assigned to a task for the reminders to appear on the portlet.

To set up reminders, see [Updates Preferences](#). You can track the following reminders from the dashboard:

- Onboarding Tasks
- Offboarding Tasks

To update task statuses, see [Updating the Status of Tasks](#).

## Receiving Email Notifications

The SuiteApp sends email notifications to the following users defined on the plan:

- Employee
- Coordinator
- Assignee



**Important:** Email notifications sent to the employees and assignees are sent by using the email address of the coordinator. Coordinators must verify that they have an email address on their record, so that the SuiteApp can use it to send email notifications.

The SuiteApp sends an email notification after an employee updates and clicks **Save** on a plan.

The following table shows the events that trigger email notifications for each type of user.

Email Notification Trigger	Employee on the Plan	Assignee	Coordinator
New tasks were assigned to you	X	X	-
Tasks are no longer assigned to you because of any of the following:	X	X	-
<ul style="list-style-type: none"> <li>■ You were removed as an assignee</li> <li>■ Tasks were deleted</li> <li>■ Plan was deleted</li> </ul>			
Due dates for your tasks were changed	X	X	-
Daily update of your tasks	X	X	-
Daily update of all tasks related to an employee change	-	-	X

# Employee Offboarding

When an employee leaves your company, you should update the employee's information in NetSuite. NetSuite provides tools to terminate employees, track termination reasons, and deactivate or remove employee records.

For more information, see the following help topics:

- [Employee Termination](#)
- [Termination Reason Tracking](#)
- [Deleting Employee Records](#)
- [Inactivating Employee Records](#)

## Employee Termination

When an employee leaves your company, you should modify the person's record to reflect the termination date. You should also remove any granted user roles and access permissions. You can deactivate the employee record if you want to prevent it from appearing in lists or as choices anywhere in your account. For more information, see [Inactivating Employee Records](#).

You must also specify a termination date. If you use the Termination Reason Tracking feature, you must specify a termination category, termination reason, termination details, and if the termination is regretted. For more information, see the help topic [Termination Reason Tracking](#).

If you use SuitePeople U.S. Payroll to pay this employee, you can create an individual paycheck to complete any financial obligation you have to them. For more information, see the help topics [Viewing Individual Paychecks](#) and [Creating an Off-Cycle Payroll Batch](#).

## Modifying a Terminated Employee's Record

Use the following procedure to modify a terminated employee's record.

### To modify a terminated employee's record:

1. Go to Lists > Employees > Employees.
2. On the Employees list, click **Edit** next to the terminated employee's name.
3. Click the **Human Resources** subtab.
4. In the **Termination/Release Date** field, enter the last working day for the employee. Choose this day based on one of these possibilities:
  - To terminate the employee as of today or a past date, enter the appropriate date. Note that if you terminate an employee on today's date, the termination will take effect immediately and the employee will lose their access to NetSuite. If you want the employee to still access NetSuite on their last day of employment, you can terminate their employment at the end of the workday.
  - If you are using the Effective Dating feature and you want to terminate the employee on a future date, enter that future date.



**Note:** Future-dated changes are made shortly after 12:00:01 am Pacific Time on the specified date.

If you use Termination Reason Tracking, you must enter the following:

- a. **Termination Category** - Select whether the termination is voluntary or involuntary. Voluntary indicates the employee ended their employment and involuntary indicates the company ended the employment.
  - b. **Termination Reason** - Select the reason for the termination. For more information, see the help topic [Managing Termination Reasons](#).
  - c. **Termination Regretted** - Select if the termination is regretted. A regretted termination indicates that the company regards the termination as a loss. A non-regretted termination indicates that the company does not see the termination as a loss. Select **Unspecified** from the list to untrack this information.
  - d. **Termination Details** - Enter details of the termination.
5. Modify any other fields as required. For more information, see [Entering Human Resources Information for an Employee](#).
6. Click the **Access** subtab.
7. Remove all access permissions and assigned user roles.
8. Click the **System Information** subtab.
9. Check the **Inactive** box if you do not want this employee's record to appear in lists or as choices anywhere in your account.

To view inactivated employee records or reactivate them, go to Lists > Employees > Employees, and check the **Show Inactives** box.



**Important:** You should also clear the **Give Access** box to revoke access for the employee. If you want to deactivate all roles of the employee, and the employee is also a partner, customer, or vendor, you must revoke access and deactivate those records, too.

10. Click **Save**.



**Note:** You cannot delete an employee record that has any associated transactions.

## Completing Financial Obligations to a Former Employee

You must follow the laws set by your jurisdiction to complete financial obligations to a terminated employee. Depending on the jurisdiction an employee works in, you might need to pay them on the same day that employment is terminated. Otherwise, you can process the employee's final paycheck in your regular payroll batch.

If you use SuitePeople U.S. Payroll to pay your employees, follow this procedure for compensating a terminated employee.

### To complete financial obligations to a former employee:

1. Update payroll information. This ensures the employee's new status is updated with the payroll tax engine. For more information, [Updating Payroll Information](#)
2. If you need to process payroll on the same day that employment is terminated, create a one time payroll that includes only the terminated employee. For more information, [Creating an Off-Cycle Payroll Batch](#).



**Important:** For same-day payroll batches, a fee applies. Direct deposits take at least two business days to process. To pay the employee with a check, check the **No Direct Deposits** box on the Payroll Batch page.

The terminated employee is paid during the first regular payroll cycle that includes the termination date. You can also pay them from a one-time payroll batch.

## Mass Deleting an Employee's Events

When an employee leaves your company, an administrator can delete the events they have scheduled. This is the only way to delete another employee's events that are marked Private or Show as Busy.

Roles other than administrator cannot delete events that do not belong to them. During the mass update, administrators may see public events they cannot delete.

### To perform the delete events mass update:

1. Go to Lists > Mass Update > Mass Updates.
2. Click **Activities**, and then click **Delete Events**.
3. On the **Criteria** subtab in the **Filter** column, select **Calendar**.
4. In the window that appears, select the employee whose calendar you want to delete.
5. Click **Set**.
6. Click **Preview**.
7. On the Mass Update Preview Results page, click **Perform Update**.

## Termination Reason Tracking

When you terminate an employee, you must specify a termination or release date. If you use the Termination Reason Tracking feature, you must select a termination category and a termination reason from a list of options. You must also specify termination details, and whether the termination is regretted. For more information, see [Managing Termination Reasons](#).

If you view the employee record of an employee who was terminated before this feature was enabled, these fields are populated by the string "Unspecified".

NetSuite has several default termination reasons, but you can change them or create your own. For more information, see [Default Termination Reasons](#).

The Termination Reasons page shows all of the termination reasons in your account. If you no longer want to use a reason, but it has been used in the past, you can make it inactive. To view inactivated termination reasons, select the **Show Inactives** box.

If you use the Workforce Analytics feature, you can view a high-level snapshot and synopsis of the employees who are leaving your company. You can view the reasons why employees are leaving on the Turnover Analysis page. Go to Reports > Employees/HR > Turnover Analysis. For more information, see [Workforce Analytics](#).



**Note:** When this feature is enabled mass update is not available. Instead use NetSuite's Import Assistant to update data through import of a CSV file. For information, see the help topic [Importing CSV Files with the Import Assistant](#). Also, when this feature is enabled inline editing is disabled.

Watch the following help video for information about using the Termination Tracking feature:

 Using the Termination Reason Tracking Feature

## Termination Reason Tracking Roles and Permissions Requirements

For information about the permission requirements for termination reason tracking, see [Termination Reason Tracking Permission Requirements](#).

 **Note:** If you want more control over what employee information is accessible by different NetSuite users, you can use the Advanced Employee Permissions feature. When this feature is enabled, you can use the employee permissions that come with this feature. This gives you more control over what employee information certain roles can access. You can also customize employee permission that include all or set of standard fields and sublists from the employee record. For more information, see [Advanced Employee Permissions](#).

## Managing Termination Reasons

When you enable the Termination Reason Tracking feature, NetSuite provides several default termination reasons, but you can change them or create your own. For more information, see [Default Termination Reasons](#).

The Termination Reasons page shows all of the termination reasons in your account. If you no longer want to use a reason, but it has been used in the past, then you can make it inactive. Select the **Show Inactives** box to show all reasons.

## Adding Termination Reasons

Use the following procedure to add a termination reason.

### To add a termination reason:

1. Go to Setup > HR Information System > Termination Reasons > New, or click **New Termination Reason** on the Termination Reasons page.
2. Enter a **Name** for the reason. Select a **Termination Reason Category** (Voluntary, Involuntary) from the list.
3. To make the reason inactive, check the **Termination Reason is Inactive** box.
4. To save and return to the Termination Reasons page, click **Save**. To save and create another new termination reason, click the down arrow, and click **Save & New**.

## Editing Termination Reasons

Use the following procedure to edit a termination reason.

### To edit a termination reason:

1. Go to Setup > HR Information System > Termination Reasons.
2. Click **Edit** beside the termination reason you want to edit.
3. Enter a **Name** for the reason. Select a **Termination Reason Category** (Voluntary, Involuntary) from the list.

4. To make the reason inactive, check the **Termination Reason is Inactive** box.
5. Click **Save**.

## Default Termination Reasons

If you are using the Termination Reason Tracking feature, you must specify a termination reason when you terminate an employee. NetSuite has a set of default termination reasons. You can change these or create your own. For more information, see [Managing Termination Reasons](#). For each termination reason, you also specify a termination category: Voluntary or Involuntary.

This is the list of default termination reasons that are available when you start using this feature.

Termination Reason Name	Termination Category
Attendance	Involuntary
Another Job	Voluntary
Disability	Involuntary
Dissatisfaction with Compensation	Voluntary
Dissatisfaction with Co-Worker	Voluntary
Dissatisfaction with Supervisor	Voluntary
Enlisted in Armed Forces	Voluntary
Family Reasons	Voluntary
Health Reasons	Voluntary
Insubordination	Involuntary
Involuntary Other	Involuntary
Involuntary Retirement	Involuntary
Job Abandonment	Voluntary
Job Position Eliminated or Changed	Involuntary
Leave of Absence and Did Not Return to Work	Voluntary
Marriage	Voluntary
Personal Reasons	Voluntary
Refusal to Follow Instruction	Involuntary
Refused Suitable Work	Voluntary
Relocation	Voluntary
Return to School	Voluntary
Unsatisfactory Performance	Involuntary
Violation of Rules	Involuntary
Voluntary Other	Voluntary

Voluntary Retirement	Voluntary
Without Notice or Reason	Voluntary
Working Conditions	Voluntary
Work Schedule	Voluntary

## Deleting Employee Records

You can delete an employee record, but normally only in an unusual situation, such as creating the employee record in error. If an employee record has any transactions associated with it, it cannot be deleted.

If an employee is no longer actively working for your company, you should deactivate the employee record instead. For more information, see [Inactivating Employee Records](#) and [Employee Termination](#).

### To delete an employee record:

1. Go to Lists > Employees > Employees.
2. On the Employees list, click **Edit** next to the name of the employee record you want to delete.
3. On the **Actions** menu, click **Delete**.
4. When prompted to confirm, click **OK**.
5. If the employee record has dependent records, the employee record cannot be deleted and a NetSuite notice page will appear. Here, you can either click **Go Back** or click the hyperlink to view the dependent records. To delete the employee record, each dependent record must be deleted first.

## Inactivating Employee Records

You can deactivate employee records for employees who no longer actively work for your company. This enables you to remove their access to NetSuite, while retaining the history of their employment with your company.

When you deactivate an employee record, you can no longer select it in employee fields.

You can also delete an employee record. You would only do that if the record was created in error, or if you had some other reason to recreate the employee record. For more information, see [Deleting Employee Records](#).

The following are some cases in which you would want to deactivate an employee record:

- You are terminating the employee. In this case, you do not want to delete the employee record. It contains information that you might need in the future for record-keeping or auditing purposes. Also, you might rehire the employee and could make their record active again. For more information, see [Employee Termination](#).
- The employee is taking a leave of absence, so you want to temporarily remove their access to NetSuite and restore it later.

When you deactivate an employee record:

- The employee's login credentials and role assignments remain intact. If they return to your company and you make their record active again, they can access NetSuite as they did before being deactivated.

- If the employee has scheduled reports, then the report schedules are automatically deleted.
- If the employee is the owner of calendar events, those events remain in the calendar.
- If the employee is the owner of saved searches, they remain in the list of saved searches.

### To inactivate an employee record:

1. Go to Lists > Employees > Employees.
2. Check the **Show Inactives** box at the top of the list.
3. In the **Inactive** column, check the box next to the employee you want to deactivate.
4. Click **Submit**.



**Important:** You should also clear the **Give Access** box to revoke access for the employee. If you want to deactivate all roles of the employee, and the employee is also a partner, customer, or vendor, you must revoke access and deactivate those records, too.

# Time-Off Management

The NetSuite Time-Off Management feature enables Human Resources to define and manage time-off plans according to company policies. Then, assign them to employees based on location, department, class, or with NetSuite OneWorld subsidiary. For more information, see the following topics:

- [Time-Off Management Overview](#)
- [Prerequisites for Using Time-Off Management](#)
- [Time-Off Management Setup](#)
- [Time-Off Management Integration With SuitePeople U.S. Payroll](#)
- [Viewing an Employee's Time-Off Balance](#)
- [Time-Off Changes](#)
- [Submitting Time-Off Requests on Behalf of Employees as an Administrator](#)
- [Approving or Rejecting a Time-Off Request as an Administrator](#)
- [Time-Off Management for Employees or Managers](#)
- [Time-Off Reports](#)

## Time-Off Management Overview

The NetSuite Time-Off Management feature enables Human Resources to define and manage time-off plans according to company policies. Then, assign them to employees based on location, department, class, or with NetSuite OneWorld subsidiary.

This includes the ability to:

- Create a set of time-off types for the different categories of time off that your employees can take.
- Define the time-off rules that accommodate the different policies at your company.
- Configure how NetSuite handles changes to these rules at specific employee milestones.
- Set up eligibility and entitlement.
- Set up accruals based on a fixed amount per period or hours worked.
- Set up balance and carryover limits.
- Review and make adjustments to employees' time-off balances.

Employees assigned to a time-off plan must have access to the Employee Center to submit time-off requests. Managers can review and approve time-off requests either from an email message or from the Employee Center. For more information, see [Time-Off Management for Employees or Managers](#).

The Time-Off Management feature can be integrated with other features in NetSuite, including Time Tracking, SuitePeople U.S. Payroll, Projects, and Resource Allocations:

- [Time Tracking and Time-Off Management](#)
- [Payroll and Time-Off Management](#)
- [Projects and Time-Off Management](#)
- [Project Management, Resource Allocations, and Time-Off Management](#)

## Time Tracking and Time-Off Management

The Time Tracking feature must be enabled to use Time-Off Management. If you use time transactions to track employee time and bill time to projects, NetSuite generates time entry records when a time-off request is approved. If you use SuitePeople U.S. Payroll, time usage is reflected in Payroll. You can view generated time entry records under the Time Tracking subtab of the employee record. For more information, see the help topic [Time Tracking](#).



**Note:** When the accounting preference **Require Approvals on Time Records** box is checked, time-off entries generated from approved time-off requests cannot be edited. This preference is located on the **Time & Expenses** subtab. To allow employees to make updates, clear this box.

## Payroll and Time-Off Management

Time-Off Management and SuitePeople U.S. Payroll can work together to ensure that your employees receive the time off that they are entitled to and that they are paid correctly. For more information about how to set up Payroll and Time-Off Management to work together, see [Time-Off Management Integration With SuitePeople U.S. Payroll](#).

## Projects and Time-Off Management

Different types of time off can be associated with projects and project tasks. When a time-off request is approved for a time-off type that is associated with a project and project task, note the following. The project information appears on the **Time Details** subtab on the time tracking record.

## Project Management, Resource Allocations, and Time-Off Management

When the Project Management and Resource Allocations features are both enabled, they work with Time-Off Management in the following ways:

- A project manager allocates a resource to a project. The resource has approved time off that conflicts with the project dates. NetSuite displays a warning on the resource allocation record. The conflict also appears on the Time-Off Conflicts subtab of the Resources subtab on the project record.
- A resource already allocated to a project requests time off that conflicts with the project dates. However, the time-off request is approved. The project manager receives an email notification with the details of the conflict.

For more information, see the help topic [Resource Allocations and Time-Off Management](#).

## Prerequisites for Using Time-Off Management

This section outlines the prerequisites for using the Time-Off Management feature:

- [Install the Time-Off Tracking SuiteApp](#)
- [Assign Work Calendars to Employees](#)

- Time-Off Management Roles and Permissions Requirements

 **Note:** Currently, the Time-Off Tracking SuiteApp supports only US and UK English languages.

## Install the Time-Off Tracking SuiteApp

 **Important:** To install the Time-Off Tracking SuiteApp, you must have the Time-Off Management feature enabled. Go to Setup > Company > Enable Features. On the Employees subtab, under HR Information System, check the Time-Off Management box. If you do not see this feature on the Enable Features page, you need SuitePeople HR provisioned on your account. For more information, see [SuitePeople Overview](#).

With the Time-Off Tracking SuiteApp, employees can make time-off requests using their Employee Center role. The workflow included in the SuiteApp ensures that requests are routed for approval to an employee's supervisor. The Time-Off Tracking SuiteApp also includes a set of saved searches that you can use as reports. For more information, see the help topic [Time-Off Tracking Reports](#).

For more information about installing SuiteApps, see the help topic [Installing a Bundle](#). You can search for the Time-Off Tracking Suite App using the following information:

- Bundle Name: **Time-Off Tracking**
- Bundle ID: 112449

The Time-Off Tracking SuiteApp is a managed bundle and is automatically updated whenever fixes and enhancements are available.

 **Note:** The Time-Off Tracking SuiteApp uses the time-off request record. Custom fields on the time-off request record do not appear when employees create time-off requests. If you add custom fields to the time-off request record, make sure that the fields are not required. If they must be required, include default values for the fields.

## Assign Work Calendars to Employees

When you use the Time-Off Management feature, you must assign a work calendar to employees on the employee record. This assignment ensures that NetSuite can determine which days are working days for the employee. NetSuite uses the work calendar to calculate the number of hours to deduct from an employee's balance when a time-off request is submitted. For more information, see the help topics [Setting Up a Work Calendar](#) and [Assigning a Time-Off Plan to an Employee](#).

## Time-Off Management Roles and Permissions Requirements

The Time-Off Administration permission is required to set up the Time-Off Management feature. The standard roles that include this permission are HR Generalist, Administrator, and Chief People Officer (CPO). For details, see [Time-Off Management Permission Requirements](#).

You can also create custom roles that include this permission. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

If your role has the appropriate permission, you can review time-off requests before employees take the time off, and approve or reject them as needed.

Employees in your company who are assigned a time-off plan must have access to the Employee Center role. This access ensures that they can submit time-off requests and view their time-off balances.

Managers can review requests from an email message or from the Employee Center.

## Time-Off Management Setup



**Important:** If you are using SuitePeople U.S. Payroll, see [Time-Off Management Integration With SuitePeople U.S. Payroll](#).

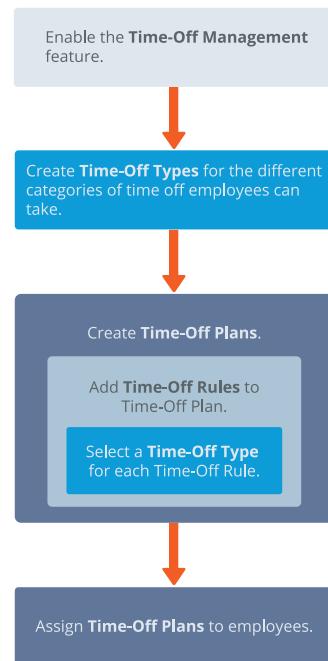
Before setting up the Time-Off Management feature, consider how your company's time-off policies are applied to employees. Think about the differences between employees. For example, the amount of time-off they are entitled to, and how unused time off is dealt with at the end of the year. Another example is how time off is accrued. You can create multiple time-off plans to accommodate these differences.

Time-off plans contain the time-off types and time-off rules that reflect your company's time-off policies. Create the time-off types so that they match the specific leave types at your company, such as vacation time and sick leave. The time-off rules define how to handle time-off eligibility, entitlements, accruals, and carryover during an employee's tenure with the company.

Complete the following steps to set up the Time-Off Management feature:

- [Creating a Time-Off Type](#)
- [Creating a Time-Off Plan](#)
- [Creating a Time-Off Rule](#)
- [Assigning a Time-Off Plan to an Employee](#)

The process for setting up Time-Off Management is as follows:



## Time-Off Types

With time-off types, you can define the different categories of time off that employees at your company are entitled to take.

For example, you can create a time-off type for vacation and another time-off type for sick leave. These time-off types should be consistent with your company time-off policies.

You can create unlimited time-off types to reflect the various time-off policies at your company. You can add multiple rules to the same time-off type to specify the different rules to apply during an employee's tenure. For more information, see [Time-Off Rules](#).

Watch the following help video for information about creating a time-off type:



## Creating a Time-Off Type

Use the following procedure to create a time-off type.

### To create a time-off type:

1. Go to Setup > HR Information System > Time-Off Type > New.
  2. In the **Name** field, enter a unique name for the type. The name specified here appears in time-off lists for time-off requests, time-off plans, and time-off changes.
  3. In the **Display Name** field, enter how you want the time-off type name to appear to employees. For example, you might have different time-off types for different subsidiaries, departments, or locations. However, you want the type to appear the same to all employees.
  4. To track only the usage of this time-off type, without having an entitlement and accruing a positive balance, check the **Track Only** box. For example, you might want to check the Track Only box if your company offers unlimited sick days.
- When you change an existing time-off type to track only, future accruals are not calculated. All balance entries prior to the change are saved and displayed in the time-off changes record. For more information, see [Viewing an Employee's Time-Off Balance](#).
5. If you are using SuitePeople U.S. Payroll, select a **Payroll Item**. For more information, see [Time-Off Management Integration With SuitePeople U.S. Payroll](#).



**Important:** A time-off type can be associated with only one payroll item. Payroll items used with the Time-Off Management feature must be an Earning type. For more information, [Setting up Payroll Items to Work With Time-Off Management](#).

6. In the **Minimum Increment** and **Increment Unit** fields, specify the minimum increment of time off that is required for this type. Time-off requests cannot be for less than this amount and must be multiples of this amount. Leave the field value at zero or blank to allow employees to enter any value.

For example, employees must take time off in half-day increments. Set the **Minimum Increment** field to 0.5, and then, from the **Increment Unit** list, select **Days**.

7. To associate this time-off type with a specific project, select the project from the **Project** list.

When you create a project to associate with a time-off type, consider the following:

- You select **Limit Time and Expenses to Resources** on the Preferences subtab. Therefore, employees who track time against a project must have **Project Resource** selected on their employee record.
  - You select **Allow Time Entry** and **Classify Time as Exempt** on the Preferences subtab. Employees can track time against a project even if **Project Resource** is not checked on their employee record.
8. To associate this time-off type with a specific task on the project, select it from the **Project Task** list. When you create a project task to associate with a time-off type, enter a value in the **Estimated Work** field on the Project Task/Milestone page. If you do not enter anything in this field the project task is saved as a milestone. It does not appear in the **Project Task** list on the time-off type record. For more information, see the help topic [Project Tasks](#).
- When you associate a time-off type with a project and project task, reports run for tracked time include time entries generated from time-off requests.
9. From the color picker, select the color that you want to associate with this time-off type.
  10. Click **Save**.

Next, create the time-off plan and add the types you created to it. For more information, see the help topic [Creating a Time-Off Plan](#).

## Editing a Time-Off Type

You can edit a time-off type at any time. However, changes that affect accruals for a large number of employees should be made at the end of a business day. This gives NetSuite enough time to implement the changes. You should also avoid making any changes that affect accruals on the same accrual day.

### To edit a time-off type:

1. Go to Setup > HR Information System > Time-Off Type.
2. Click **Edit** next to the time-off type you want to change.
3. When you are finished editing, click **Save**.

## Inactivating or Deleting a Time-Off Type

When you deactivate a time-off type, it no longer appears in lists.

You cannot delete time-off types if they are assigned to a time-off plan, or if a balance change or time-off request was made against it. Before you delete a time-off type, remove it from the time-off plan, and then delete all time-off changes and requests that use the time-off type.

### To deactivate a time-off type:

1. Go to Setup > HR Information System > Time-Off Type.
2. Next to the time-off type you want to make inactive, click **Edit**.
3. Check the **Inactive** box.
4. Click **Save**.

If the type-off type is assigned to a time-off plan, you must remove it from the plan before you deactivate it. To view a list of inactive types, go to the list page view and check the **Show Inactives** box.



**Note:** When a time-off type is inactivated, any time-off rules associated with it are hidden. All future accruals are deleted, and any unused time off expires at the end of the year without a carryover. Any manual changes and approved time-off requests for a future date must be manually removed, if required.

### To delete a time-off type:

1. Go to Setup > HR Information System > Time-Off Type.
2. Next to the time-off type you want to delete, click **Edit**.
3. Select **Delete** from the **Actions** menu.
4. When prompted to confirm the deletion, click **OK**.

## Setting Up Time-Off Type Auto-Approval and Time-Off Self-Approver

You can set a time-off type that is automatically approved when requested and subject to an approval threshold.

You can assign select employees as time-off self-approvers so they can submit time-off requests that are automatically approved. This is especially useful for company executives, such as the Chief Product Officer, whose time-off you still want to track.

### To set up a time-off type for auto-approval with threshold:

1. Go to Setup > HR Information System > Time-Off Type.
2. Click **Edit** next to the time-off type you want to change.
3. Check the **Auto-Approve with Threshold** box.
4. In the **Auto-Approval Threshold** field, specify the maximum period of time that the time-off is automatically approved. Time-off requests exceeding the threshold will require supervisor approval. The value follows the unit selected in the **Increment Unit** field. The minimum value required for this field is **1**, and there is no maximum. You can enter a value such as **200** to allow for almost unlimited time-off auto-approvals.

For example, if you set a threshold of 5 days, requests of up to 5 consecutive days will be automatically approved. Requests exceeding 5 days will require supervisor approval. For more information, see Guidelines for Time-Off Auto-Approvals.

5. Click **Save**.

The following guidelines describe how time-off type auto-approvals work with other time-off types in the same request:

- A time-off request with auto-approved and non-auto-approved time-off types requires supervisor approval.
- A time-off request with multiple auto-approved time-off types may still require supervisor approval depending on the threshold set for each type. Also, the total duration of the time-off request checks against the highest threshold value among all time-offs in the request.

The following table summarizes different scenarios when submitting multiple auto-approved time-off types in the same request.

Time-Off Type Submitted		Total Duration of Time-Off Request	Requires Supervisor Approval?
A	B		
Within threshold	Within threshold	Within highest threshold value	No
Within threshold	Within threshold	Exceeds highest threshold value	Yes
Within threshold	Exceeds threshold	Within highest threshold value	Yes
Within threshold	Exceeds threshold	Exceeds highest threshold value	Yes
Exceeds threshold	Exceeds threshold	Exceeds highest threshold value	Yes

- To avoid complications, inform users to submit auto-approved time-off requests separately from non-auto-approved time-offs.

### To assign an employee as a time-off self-approver:

- Go to List > Employees > Employees.
- On the Employees list, click **Edit** next to the employee you want to set up as a time-off self-approver.
- Click the **Time-Off** subtab.
- Check the **Time-Off Self-Approver** box.
- Click **Save**.

If your account has Advanced Employee Permissions enabled, ensure that you add **Time-Off Self Approver** as a custom field in your custom employee permissions. For more information, see [Adding Custom Fields to Advanced Employee Permission](#).

## Setting Up Time-Off Calendar Event Creation

You can set time-off types to automatically create an event in the NetSuite calendar. The time-off requester and their supervisor sees the approved time-off requests in their Calendar portlet. When the time-off request is cancelled or rejected, the calendar event is deleted from the calendar. For more information about the Calendar and events, see the help topics [Calendar Portlets](#) and [Working with Events](#).

A calendar event is created for each day in the approved time-off request. By default, all time-off calendar events are set as an All Day event and follows the timezone preferences of the time-off requester. The employee and their assigned supervisor are set as event attendees and must have Active employee records.

### To set up automatic time-off calendar event creation:

- Go to Setup > HR Information System > Time-Off Type.
- Click **Edit** next to the time-off type you want to change.
- Check the **Create Calendar Event** box.
- Click **Save**.

## Time-Off Plans

A time-off plan contains the time-off types and rules that dictate how each time-off type is applied. Rules define how eligibility, accruals, entitlements, and carryover work for employees in the plan, and how they evolve over each employee's tenure with the company.

Before you create a time-off plan, make sure you have set up and defined time-off types. For more information, see [Creating a Time-Off Type](#).

Watch the following help video for information about creating a time-off plan:



## Creating a Time-Off Plan

Use the following procedure to create a time-off plan.

### To create a time-off plan:

1. Go to Setup > HR Information System > Time-Off Plan > New.
2. In the **Name** field, enter a name for the time-off plan. This name appears wherever you are required to select a time-off plan, such as the employee record. Name the plan so that you or someone else in HR can easily pick the right plan to assign to each employee.
3. To include forecasted accruals for the year in days available to an employee, check the **Days Available Includes Future Accruals for the Year** box. To include only time off that employees have accrued to date, clear the box.
4. From the **Start of Entitlement Period** list, select when the entitlement period starts. For example, if employees are entitled to 15 days, and if April is selected, the entitlement period starts April 1st.
5. If necessary, select a **Subsidiary, Class, Department**, or **Location**. You can assign this plan only to employees who are associated with the department, class, location, and subsidiary you set here. If you do not set a specific department, class, location, or subsidiary, this plan can be assigned to anyone.
6. Click **Save**.

After you save the plan, you can create time-off rules. For more information, see the help topic [Creating a Time-Off Rule](#).

## Editing a Time-Off Plan

You can make changes to a time-off plan at any time. After the plan is saved, the system updates any future time-off changes to reflect the new settings.

### To edit a time-off plan:

1. Go to Setup > HR Information System > Time-Off Plan.
2. Click **Edit** next to the time-off plan you want to change.
3. When you are finished editing, click **Save**.



**Note:** If you are removing rules from a plan, you cannot delete the last rule if the time-off plan is assigned to employees. You must either add another rule or unassign the plan from all employees before you can delete the rule.

## Inactivating or Deleting a Time-Off Plan

When you deactivate a time-off plan, it no longer appears in lists. To deactivate a time-off plan that is already assigned to an employee, first remove the time-off plan from the employee record. To view a list of inactive plans, go to the list page view and check the **Show Inactives** box.

### To deactivate a time-off plan:

1. Go to Setup > HR Information System > Time-Off Plan.
2. Next to the time-off plan that you want to make inactive, click **Edit**.
3. Check the **Inactive** box.
4. Click **Save**.

### To delete a time-off plan:

1. Go to Setup > HR Information System > Time-Off Plan.
2. Next to the time-off plan that you want to delete, click **Edit**.
3. From the **Actions** menu, select **Delete**.
4. When prompted to confirm the deletion, click **OK**.

If you attempt to delete a time-off plan that has employees assigned to it, a popup window appears. Click the link in the window to view a list of all the employees that are assigned to the plan. Before you can delete the time-off plan, you must remove the time-off plan from each employee record.

## Time-Off Rules

After you create a time-off plan, you must define and apply rules to the time-off plan. Time-off rules let you specify how time off accumulates (that is, how time off accrues) within the time-off plan by time-off type. In a time-off rule, you can also set up how to manage time-off balance and carryover limits.



**Important:** If you use SuitePeople U.S. Payroll in your NetSuite account, you must follow the setup instructions in [Time-Off Management Integration With SuitePeople U.S. Payroll](#).

Watch the following help video for information about creating a time-off rule:

[Creating Time-Off Rules Using the Time-Off Management Feature — Video 3 of 4](#)

## Creating a Time-Off Rule



**Important:** If you use SuitePeople U.S. Payroll in your NetSuite account, follow the setup instructions in [Time-Off Management Integration With SuitePeople U.S. Payroll](#).

### To create a time-off rule:

1. Go to Setup > HR Information System > Time-Off Plan.
2. Beside the plan that you want to define rules for, click **Edit**.
3. Click **New Time-Off Rule**.
4. In the **Time-Off Type** field, select a time-off type to apply to the plan.



**Tip:** To create a new time-off type for this plan, in the Time-Off Type field, click **New**.

5. Specify the minimum tenure for this time-off type and whether the tenure is in months or years. Typically, minimum tenure is used to increase the amount of time off that employees are entitled to over a specific period of time. However, it can also be used to adjust an accrual or carryover rule at an employment milestone.

For example, you want employees to start with 10 vacation days and then set an increase after five years of employment to 15 vacation days. To do this, add two time-off rules to the plan using the same time-off type. One rule has a minimum tenure of zero with an entitlement of 10 vacation days. The second rule has a minimum tenure of five years with an entitlement of 15 vacation days.

6. Set up time-off accruals. For more information, see [Time-Off Accruals](#).
7. Set up balance and carryover limits. For more information, see [Setting up Balance and Carryover Limits in a Time-off Rule](#).
8. Click **Save**.

Repeat these steps for each rule that you want to apply to this time-off plan. Within a plan, you can create multiple rules for one time-off type. However, the time-off type must accrue in the same way, by either a fixed amount or by hours worked, in each rule where it appears.

## Time-Off Accruals



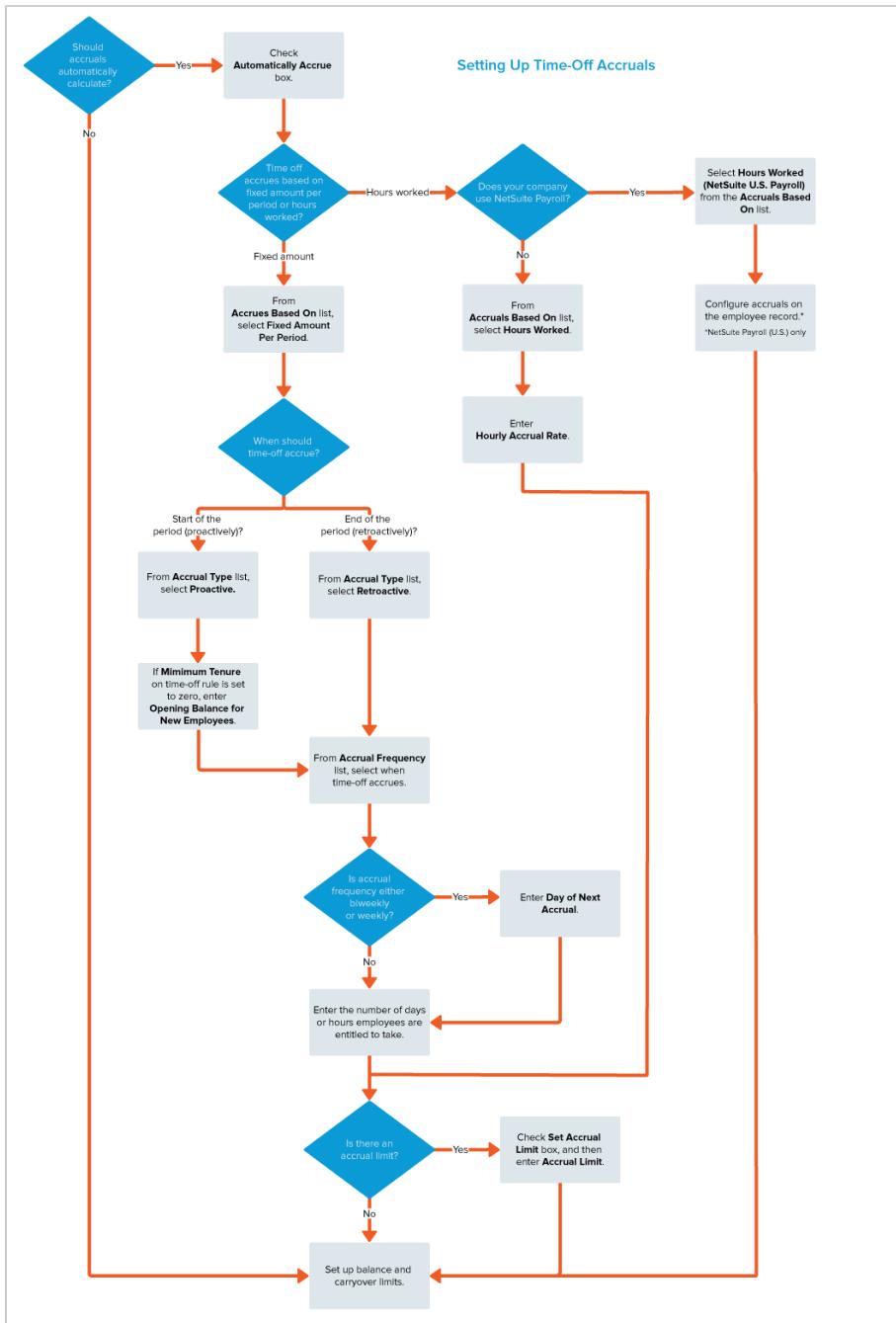
**Important:** If you use SuitePeople U.S. Payroll in your NetSuite account, follow the setup instructions in [Time-Off Management Integration With SuitePeople U.S. Payroll](#).

Time-off types can automatically accrue within a time-off plan in one of two ways: by a fixed amount per period, or by hours worked. For more information, see [Setting up an Accrual Based on a Fixed Amount per Period](#) and [Setting up an Accrual Based on Hours Worked](#).



**Note:** If you select a track only time-off type in the time-off rule, accrual options do not appear in the time-off rule.

The following diagram illustrates the process for setting up time-off accruals in a time-off rule:



**Important:** Within a time-off plan, if two or more rules use the same time-off type, both types must accrue in the same way. They must accrue either by a fixed amount or by hours worked.

## Setting up an Accrual Based on a Fixed Amount per Period

Accruals based on a fixed amount are always set up in time-off rules.

When time-off types accrue by a fixed amount per period:

- Time off accrues after a fixed amount of time: weekly, biweekly, semi-monthly, monthly, or annually.

- You set an annual entitlement for the time-off type. For example, employees might be entitled to two personal days in a year.
- Accruals are calculated based on the annual entitlement divided by the number of accrual periods in a year.

For example, time off accrues semi-monthly (or 24 times a year). The annual entitlement is 15 days. Therefore, the accrual amount per period =  $15 \div 24$ .

- Time off can accrue proactively (employees accrue time off for the period they are about to work). It can also accrue retroactively (employees accrue time off for the period they have already worked).

## To set up an accrual based on a fixed amount:

1. In the time-off rule, under **Accrual Method**, check the **Automatically Accrue** box.
2. From the **Accrues Based On** list, select **Fixed Amount Per Period**.
3. From the **Accrual Type** list, select whether time off accrues proactively or retroactively:
  - If employees accrue time off for the period they are about to work, select **Proactive**. Next, set the Minimum Tenure. If minimum tenure is set to zero, in the **Opening Balance for New Employees** field, choose one of the following:
    - Full Amount for Accrual Period** - Employees' first accrual is the full amount specified for the accrual period. It is applied either on their start date or the first day they are eligible to accrue based on the rules defined in their plan.
    - Prorated Amount for Accrual Period** - Employees' first accrual is a prorated amount based on the number of working days remaining in the accrual period. It is applied either on their start date or the first day they are eligible to accrue based on the rules defined in their plan.
    - Zero** - Employees' first accrual takes place on the next regularly scheduled accrual date.
  - If employees accrue time off for the period they have already worked, select **Retroactive**.
4. In the **Accrual Frequency** field, choose when time off accrues.

If you select **Biweekly** or **Weekly** as the accrual frequency, set the day of the next accrual. This determines the calendar day on which the accrual is applied.



**Note:** Annual and monthly accruals occur on the first day of the year/month for proactive accruals. They occur on the last day of the year/month for retroactive accruals. Semi-monthly accruals occur on the first and the 15th day of each month for proactive accruals. They occur on the 15th and the last day of each month for retroactive accruals.

5. In the **Entitlement** field, enter the number of days or hours that employees earn each year.
  6. In the **Entitlement Unit** field, specify whether the entitlement is in days or hours.
- The **Accrual Amount** and **Accrual Amount Unit** fields display the accrual rate based on your selections.
7. To enable an accrual limit, check the **Set Accrual Limit** box, and then do the following:
    - In the **Accrual Limit** field, enter the maximum number of days that employees can accrue. For example, if you enter 15 days, your employees stop accruing time when they reach this limit. Employees start accruing time again when they use some of their accrued time.
- The **Accrual Limit Unit** field displays the accrual limit rate based on your selections.
8. Click **Save**.

Continue to [Setting up Balance and Carryover Limits in a Time-off Rule](#).

## Setting up an Accrual Based on Hours Worked

Accruals based on hours worked can be set up in one of two ways, depending on whether you use SuitePeople U.S. Payroll in your account:

- If you use the Payroll feature, you set up accruals on the Payroll > Accrued Time subtab of the employee record. For more information, see [Time-Off Management Integration With SuitePeople U.S. Payroll](#).

**Note:** If you are setting up Time-Off Management for a subsidiary that does not use Payroll, accruals based on hours worked are **not** available.

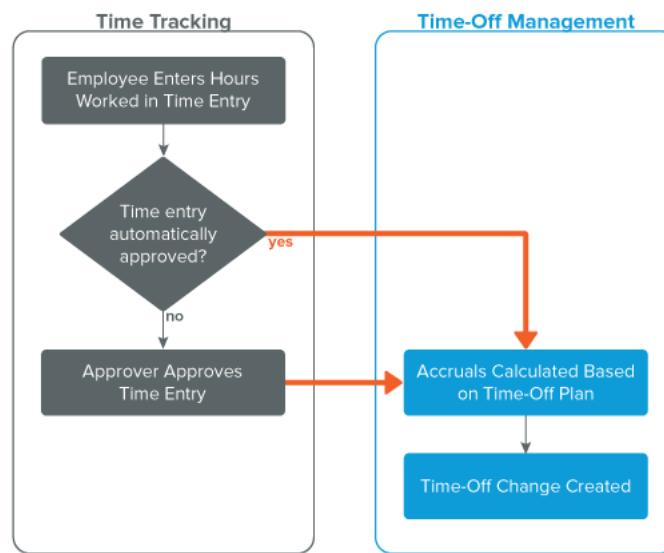
- If the Payroll feature is not enabled in your account, you set up accruals in time-off rules. The rest of this topic describes this method.

When time-off types accrue by hours worked:

- The Time Tracking feature must be enabled.
- Accruals are calculated based on the hours that an employee works on approved time entries multiplied by an accrual rate.

For example, the accrual rate is 0.04. The approved time entry shows 20 hours worked. The accrual amount for the time entry =  $20 \times 0.04$ .

The following diagram shows how the Time Tracking feature and the Time-Off Management feature work together to calculate hourly accruals for an employee:



### To set up an accrual based on hours worked:

- In the time-off rule, under **Accrual Method**, check the **Automatically Accrue** box.
- From the **Accrues Based On** list, select **Hours Worked**.
- In the **Hourly Accrual Rate** field, enter the accrual rate.
- To enable an accrual limit, check the **Set Accrual Limit** box, and then do the following:
  - In the **Maximum Accrual Limit** field, enter the maximum number of hours that employees can accrue. For example, if you enter 80 hours, employees stop accruing time when they reach this limit. Employees start accruing time again when they use some of their accrued time.

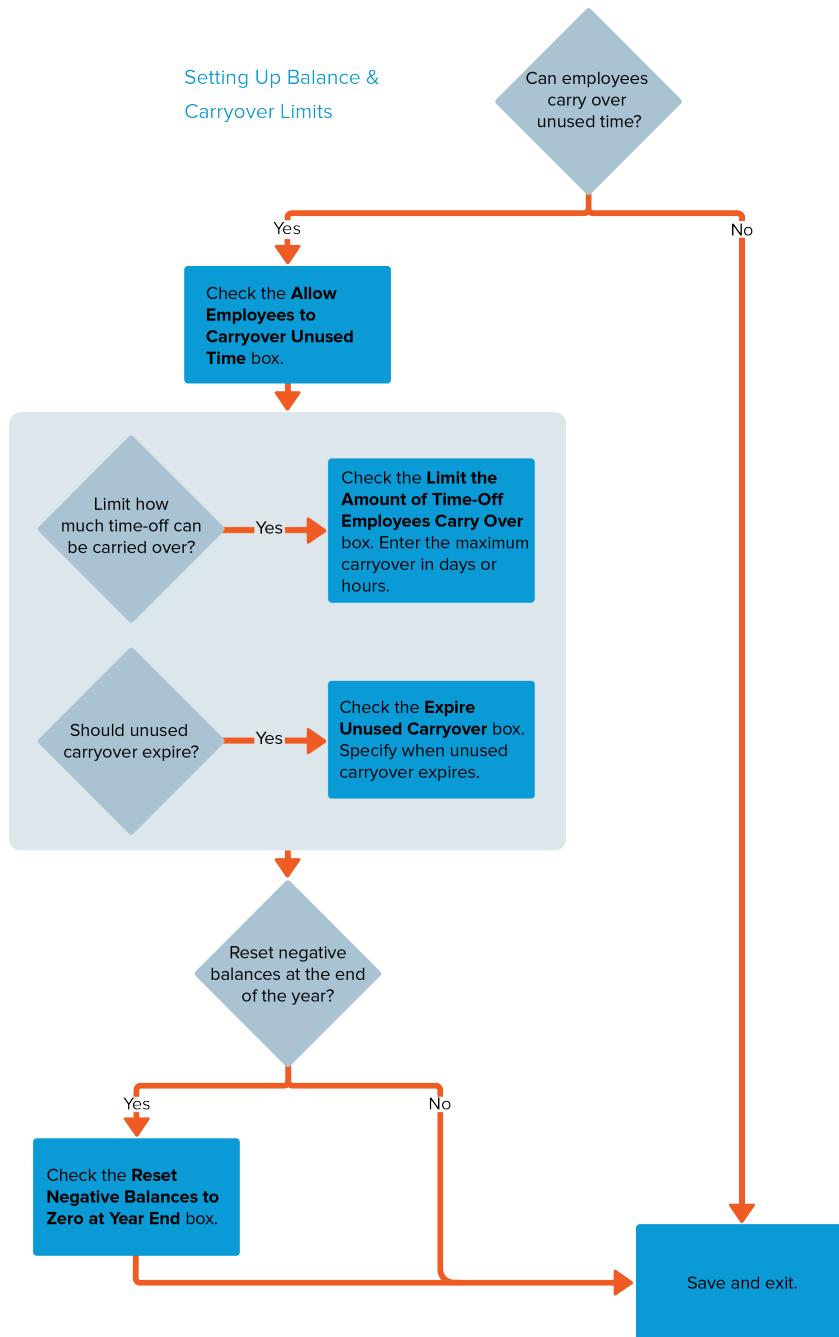
The **Maximum Accrual Unit** field displays the accrual limit rate based on your selections.

5. Click **Save**.

Continue to [Setting up Balance and Carryover Limits in a Time-off Rule](#).

## Setting up Balance and Carryover Limits in a Time-off Rule

The following diagram illustrates the process for setting up balance and carryover limits:



[To set up balance and carryover limits:](#)

1. In the time-off rule, set up how you want to manage carryover balances:
  - To deduct unused time off from an employee's balance, under **Balance and Carryover Limits**, clear the **Allow Employees to Carry Over Unused Time-Off** box.
  - To allow carryover, check the **Allow Employees to Carry Over Unused Time-Off** box. This is the default setting. Next, do the following:
    - To restrict how much unused time off can be added to next year's balance, check the **Limit the Amount of Time-Off Employees Carry Over** box. Then, do the following:
      1. In the **Maximum Carryover** field, enter the maximum amount of time each employee is entitled to carry over.
      2. In the **Maximum Carryover Unit** field, select the unit of time for the maximum carryover field.

For example, employees are entitled to carry over 5 days. Enter 5 in the **Maximum Carryover** field, and then select **Days** in the **Maximum Carryover Unit** field.

- To expire carried over time off after a specific period of time, check the **Expire Unused Carryover** box. Then, select which month the carried over time off should expire.

For example, if you select March, employees have until the end of March to take this type of time off. If they do not book the time off before it expires, it is removed from their accrual and they can no longer use it.



**Note:** If you select a date in the past, the expiry does not occur until the following year. If you change a carryover expiry month from a future date to a past date, the change does not occur until the following year. This is also true if you change a carryover expiry from a past date to a future date. The change takes effect in the current calendar year only if the expiry month is in the future.

- To prevent employees from carrying over negative balances at the end of the year, check the **Reset Negative Balances to Zero at Year End** box.
- To display expiry notification messages to employees in the Employee Center, check the **Show Balance Expiry** box. Notifications appear in the Employee Center when employees have time off that expires within the current or the next calendar month.

2. Click **Save**.

## Deleting a Time-Off Rule

Use the following procedure to delete a time-off rule.

### To delete a time-off rule:

1. Go to Setup > HR Information System > Time-Off Plan.
2. Beside the plan that contains the rule you want to delete, click **Edit**.
3. From the **Time-Off Rule** subtab, select **Edit** beside the time-off type from the rule you want to delete.
4. From the **Actions** menu, select **Delete**.
5. When prompted to confirm the deletion, click **OK**.



**Note:** You cannot delete the last rule in a time-off plan when the plan is assigned to employees. Before deleting all of the rules in the plan, unassign the plan from all employees.

## Assigning a Time-Off Plan to an Employee

When the Time-Off Management feature is enabled, a **Time-Off** subtab is added to your employee records. From here you can assign a time-off plan to your employees and then look up their current time-off balances. Employees assigned to a time-off plan can submit time-off requests and look up their balances from the Employee Center. The requests are for the time-off types they are eligible for, based on the rules defined in their plan.

### Before assigning a time-off plan to an employee:

- If you have not done so already, create an employee record for employees that you want to give access to time-off management. For more information about creating employee records, see [Adding an Employee](#).
- Make sure employees have access to time-off management from the Employee Center. For more information, see [About the Employee Center Role](#).



**Important:** If you use SuitePeople U.S. Payroll in your NetSuite account, see [Updating the Employee Record for Time-Off Management and Payroll](#).

Watch the following help video for information about assigning a time-off plan:

[Assigning a Time-Off Plan Using the Time-Off Management Feature — Video 4 of 4](#)

### To assign a time-off plan to an employee:

1. Go to List > Employees > Employees.
2. On the Employees list, click **Edit** next to the employee you want to set up for time-off management.
3. In the **Supervisor** field, select the employee's supervisor. The supervisor receives any time-off requests that the employee submits.
4. Click the **Time-Off** subtab.
5. In the **Time-Off Plan** field, select the plan to assign to the employee. If the time-off plan does not appear, check that rules are assigned to the plan. For more information, see [Time-Off Rules](#).
6. In the **Start Date for Time-Off Calculations** field, enter the date when you want to start time-off calculations for this employee. The date is used to determine which time-off rule applies to the employee based on how long that employee has been with the company. This is different from the hire date on the employee record. This date lets HR manage when time-off milestones are reached for each employee.

For example, your company acquires another company. You might want to use the date that the acquired company's employees started working, rather than the date of the acquisition.



**Note:** If you change an employee's start date after the employee has been assigned to a time-off plan, note the following. All future accruals, carry over, and expiry are updated based on the new date.

7. Click the **Human Resources** subtab.
8. In the **Work Calendar** field, select a work calendar for the employee.

When a work calendar is selected for time-off management, it:

- tells the system which days are working days for the employee
- blocks out the days that are not considered working days when an employee fills out a time-off request
- calculates the number of hours to deduct from the employee's balance when a day is taken off

If no work calendar is selected, the system assumes that the employee works eight hours a day, Monday to Friday, with no holidays. For more information, see the help topic [Setting Up a Work Calendar](#).

9. Click **Save**.

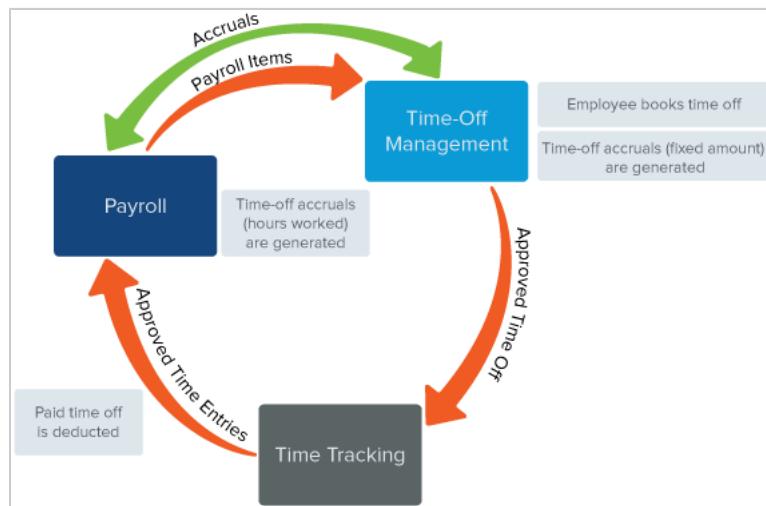
## Time-Off Management Integration With SuitePeople U.S. Payroll



**Important:** This topic applies to you if you have SuitePeople U.S. Payroll in your account. If you are **not** using Payroll, follow the steps in [Time-Off Management Setup](#) to set up the Time-Off Management feature.

If SuitePeople U.S. Payroll is set up in your account, follow the steps in this section to set up the Time-Off Management feature. Time-Off Management and Payroll are interconnected features. They must work together so that time-off accruals and time-off balances are properly tracked. When accruals and balances are correct, your employees are paid correctly and they receive the time off that they are entitled to.

To make sure that accruals and balances are correct, the Time Tracking feature must also be enabled in your account. The diagram below illustrates how the Payroll, Time-Off Management, and Time Tracking features interact:



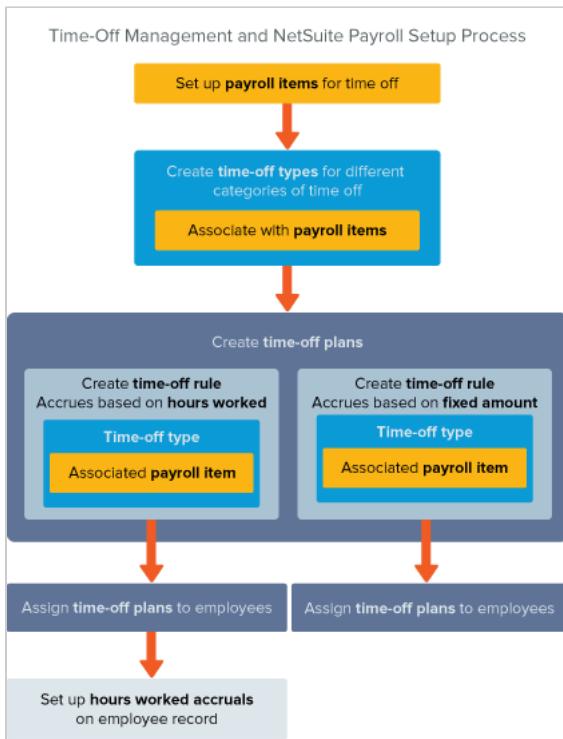
When an employee books time off, approved time off appears on the employee's timesheet. Approved time entries enter Payroll. Time-off types are associated with payroll items, which are shared with the Time-Off Management system. The employee's accruals are calculated in one of two ways:

- If time off accrues by a fixed amount in a period of time, the time-off system calculates accruals. The Time-Off Management system shares accruals with the payroll system so that proper amounts appear on employees' pay statements.

- If time off accrues on an hourly basis, Payroll calculates accruals. Payroll shares accruals with the Time-Off Management system so that time-off balances are accurate.

## Process for Setting up Time-Off Management With Payroll

The following diagram illustrates the process for setting up Time-Off Management with Payroll.



The following topics detail each step in the diagram:

1. [Setting up Payroll Items to Work With Time-Off Management](#)
2. [Associating a Time-Off Type With a Payroll Item](#)
3. [Creating a Time-Off Plan With Payroll](#)
4. [Setting up a Time-Off Rule With Payroll](#)
5. [Updating the Employee Record for Time-Off Management and Payroll](#)

## When to Set Up Time-Off Management With Payroll

The changes that you make to time-off information have an impact on payroll information. To avoid errors in payroll calculation, you should set up the Time-Off Management feature only when you are not creating or committing payroll batches. If the Time-Off Management feature is already integrated with SuitePeople U.S. Payroll, note the following. When you make changes to any time-off information, ensure that you make those changes only when you are not creating or committing payroll batches. This includes adding new employees to a time-off plan.

View the following videos to see an example of how to set up Time-Off Management with Payroll:

-  [Integrating NetSuite Payroll & Time-Off Management Overview — Video 1 of 4](#)
-  [Integrating NetSuite Payroll with Time-Off Management: Setting Up Payroll Items and Time-Off Types — Video 2 of 4](#)
-  [Integrating NetSuite Payroll & Time-Off Management: Creating Time-Off Plans and Time-Off Rules — Video 3 of 4](#)
-  [Integrating NetSuite Payroll & Time-Off Management: Updating the Employee Record — Video 4 of 4](#)

## Prerequisites for Integrating Time-Off Management With Payroll

Before you can set up the Time-Off Management feature with SuitePeople U.S. Payroll, the following must be completed:

- SuitePeople U.S. Payroll must be set up in your NetSuite account. If it is not set up in your account, contact NetSuite Customer Support. For more information, see the help topic [Payroll Setup](#).
- The Time Tracking feature must be enabled in your account. For more information, see the help topic [Managing Time Tracking](#).
- The Time-Off Management feature must be enabled.



**Important:** Be prepared to set up the Time-Off Management feature as soon as you enable it so that accruals in Payroll can be calculated correctly.

- Work calendars must be assigned to your employees. For more information see [Assign Work Calendars to Employees](#).

## Setting up Payroll Items to Work With Time-Off Management



**Important:** This topic applies to you if you use SuitePeople U.S. Payroll in your NetSuite account.

If you use SuitePeople U.S. Payroll, you already have payroll items set up in your NetSuite account. If you have payroll items set up for time off, ensure that the Item Type is set to Earning:Sick or Earning:Vacation.

If you do not have payroll items set up for time off, use the following steps:

### To create a payroll item for time off:

1. Go to Lists > Employees > Payroll Items > New.
2. If you use NetSuite OneWorld, select a subsidiary.
3. From the **Item Type** list, select either **Earning:Sick** or **Earning:Vacation**.
4. In the **Item Name** field, enter a name for the payroll item. For example, "Personal Days" or "Vacation Time".
5. If necessary, select a **Pay Code**.
6. Click **Save**.

This payroll item will be associated with a time-off type in the step [Associating a Time-Off Type With a Payroll Item](#).

## Associating a Time-Off Type With a Payroll Item



**Important:** This topic applies to you if you use SuitePeople U.S. Payroll in your NetSuite account.

You must associate time-off types with the payroll items that you created or updated. For more information, see [Setting up Payroll Items to Work With Time-Off Management](#). Associating time-off types with payroll items ensures that:

- NetSuite associates time entries with the correct payroll item. Time entries track time-off usage against each payroll item. Employees who track time can see their booked time off on their timesheet.
- Accruals can be calculated based on hours worked. For more information about calculating accruals on an hourly basis, see [Accruals Based on Fixed Amounts and Accruals Based on Hours Worked](#).

If you use Payroll for multiple subsidiaries in your NetSuite account, you must create separate time-off types for each subsidiary. You cannot use the same time-off type with multiple subsidiaries. Also, you must associate time-off types with payroll items that are associated with the same subsidiary.

For example, the subsidiaries Acme X and Acme Y both use Payroll. You set up a type called Vacation X for Acme X, and a type called Vacation Y for Acme Y. You also have a payroll item for Acme X called Vacation Pay X. You have another payroll item for Acme Y called Vacation Pay Y. To ensure that your time-off types work with payroll, you should associate the time-off type Vacation X with the payroll item Vacation Pay X. The time-off type Vacation Y should be associated with the payroll item Vacation Pay Y.

### To create a time-off type that is associated with a payroll item:

1. Go to Setup > HR Information System > Time-Off Type > New.
2. In the **Name** field, enter a unique name for the type. The name specified here appears in time-off lists for time-off requests, time-off plans, and time-off changes.  
As a best practice, if you use Payroll for multiple subsidiaries, you should include the subsidiary name in the time-off type name. For example, for a subsidiary called Acme X, you might want to name the time-off type **Vacation X**.
3. In the **Display Name** field, enter how you want the time-off type name to appear to employees. For example, you have different time-off types for different subsidiaries, departments, or locations. However, you want the type to appear the same to all employees.
4. To record usage without having an entitlement and accruing a positive balance, check the **Track Only** box.



**Note:** When you change an existing time-off type to track-only, future accruals are not calculated. All balance entries prior to the change are saved and displayed in the time-off changes record. For more information, see [Viewing an Employee's Time-Off Balance](#).

5. Select a **Payroll Item**. This payroll item should be one that you created or updated in the step [Setting up Payroll Items to Work With Time-Off Management](#).

If you use Payroll for multiple subsidiaries, make sure that you select a payroll item that applies to the subsidiary for this time-off type.



**Important:** A time-off type can be associated with only one payroll item.

6. In the **Minimum Increment** and **Increment Unit** fields, specify the minimum increment of time-off required for this type. Time-off requests cannot be for less than this amount and must be multiples of this amount. Leave the field value at zero or blank to allow employees to enter any value.
7. From the color picker, select the color that you want to associate with this time-off type.
8. Click **Save**.

## Creating a Time-Off Plan With Payroll



**Important:** This topic applies to you if you use SuitePeople U.S. Payroll in your NetSuite account.

After you create time-off types and associate them with payroll items, you can create time-off plans. A time-off plan contains different time-off types and rules that you can assign to an employee. For example, a time-off plan could include vacation time, personal time, sick days, and bereavement days. The plan would have rules that specify how these types of time off accrue. You might have different plans for part-time employees than for full-time employees. You might have different plans for employees who are paid hourly and employees who are paid a salary. You can create as many plans as you need to fulfill the time-off policies of your organization. Each time-off plan contains time-off rules. These rules define entitlement for a time-off type and how that time-off type accrues within the plan. It is important to understand the difference between accruals based on fixed amounts and accruals based on hours worked.

## Accruals Based on Fixed Amounts and Accruals Based on Hours Worked

When Time-Off Management and Payroll are integrated, time-off accruals can be automatically calculated in one of two ways:

Fixed Amount Per Period	Hours Worked (NetSuite U.S. Payroll)
Accruals are calculated based on a fixed amount (weekly, bi-weekly, monthly, semi-monthly, or annually).	Accruals are calculated based on the hours an employee works. This type of accrual might be appropriate for users who are paid hourly.
Time-Off Management calculates the accruals. You add the payroll items associated with each time-off type to the employee record in the Payroll > Accrued Time subtab.	Payroll calculates the accruals.
When the payroll batch is calculated, accrual amounts and balances from Time-Off Management are included on employees' pay statements, as of the period ending date. Time-off balances are also accurately represented in the Time-Off portlet in the Employee Center.	When the payroll batch is calculated, accrual amounts and balances from Payroll are included on employees' pay statements, as of the period ending date. Time-off balances are also accurately represented in the Time-Off portlet in the Employee Center.
Payroll items for accruals with this option must be added to the employee record in the Payroll > Accrued Time subtab. This ensures that the payroll items appear on employees' pay statements.	Payroll items for accruals with this option must be set up on the employee record in the Payroll > Accrued Time subtab. For more information, see <a href="#">Setting up</a>

Fixed Amount Per Period	Hours Worked (NetSuite U.S. Payroll)
	Accruals Based on Hours Worked On the Employee Record for Payroll.
Annual entitlement can reset at the beginning of any month	Annual entitlement must reset at the beginning of January.
Employees can carry over unused time-off, and you can set carryover expiry limits.	You can use the Accrued Time subtab on the employee record to specify whether employees can carry over unused time off. You cannot set carryover expiry limits.

For each time-off type that you plan to use, decide which type of accrual works best with your time-off policies.

### To create a time-off plan with payroll:

1. Go to Setup > HR Information System > Time-Off Plan > New.
2. In the **Name** field, enter a name for the time-off plan. This name appears wherever you are required to select a time-off plan, such as the employee record. Name the plan so that you or someone else in HR can easily pick the right plan to assign to each employee.
3. Check the **Days Available Includes Future Accruals for the Year** box to include forecasted accruals through to the end of the year. To include only time off that employees have accrued to date, clear the box.
4. From the **Reset Annual Entitlement At the Start Of** list, select the month when the entitlement period starts. The default setting is January.



**Important:** For a time-off rule that includes a time-off type that accrues based on hours worked, set **Reset Annual Entitlement At the Start Of** to **January**.

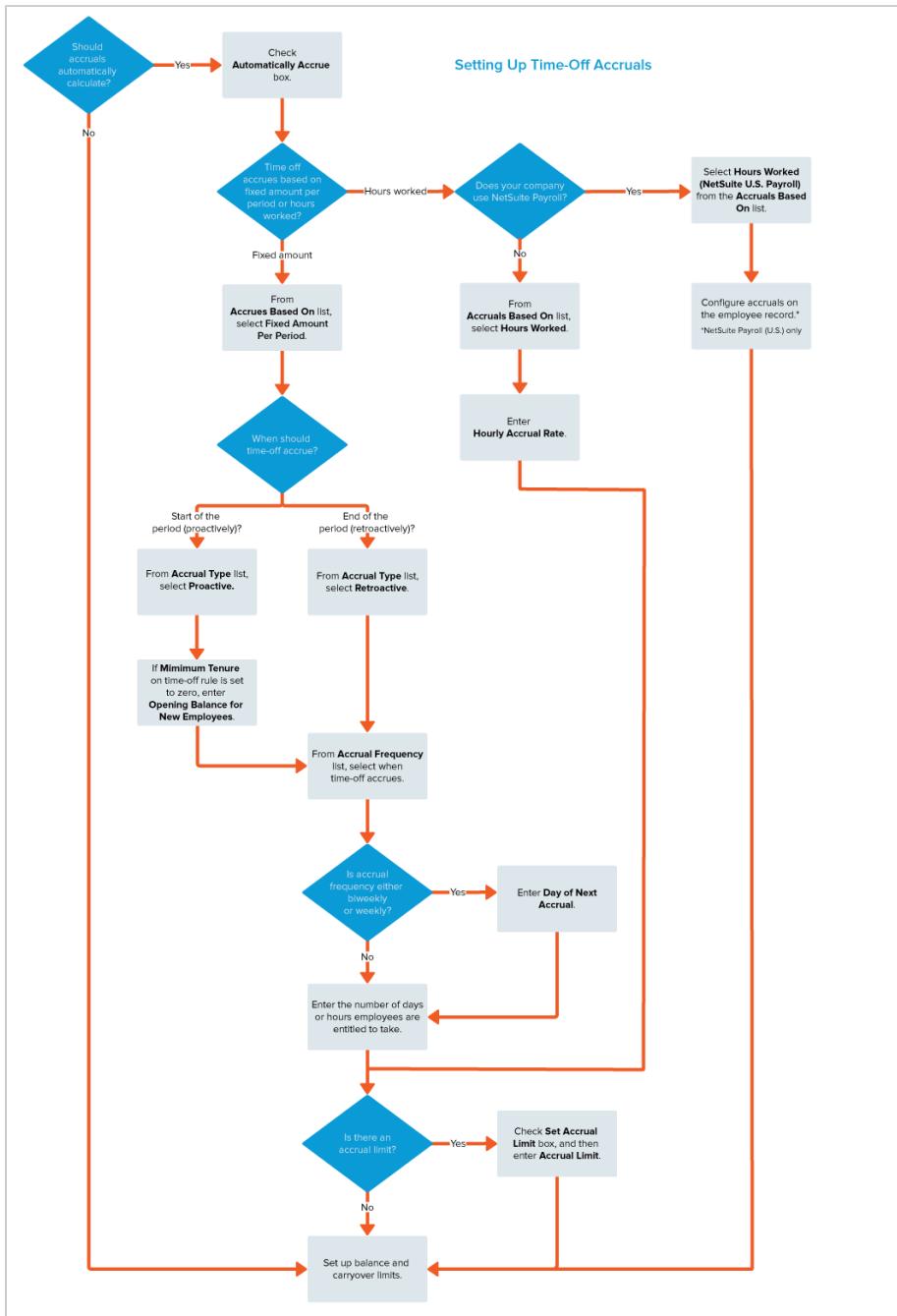
5. If necessary, select a **Subsidiary, Class, Department**, or **Location**. You can assign this plan only to employees who are associated with the department, class, location, and subsidiary you set here. If you do not set these fields, you can assign this plan to anyone.
6. Click **Save**.

## Setting up a Time-Off Rule With Payroll



**Important:** This topic applies to you if you use SuitePeople U.S. Payroll in your NetSuite account.

After you create a time-off plan, you must define and apply rules to the time-off plan. Time-off rules allow you to specify how you want employees to accumulate time off over a period of time. The image below depicts the process for setting up accruals in a time-off rule:



### To set up a time-off rule with payroll:

1. Go to Setup > HR Information System > Time-Off Plan.
2. Next to the plan that you want to define rules for, click **Edit**.
3. Click **New Time-Off Rule**.
4. In the **Time-Off Type** field, select the type of time off to apply to the plan. To integrate with Payroll, choose a time-off type that you created in [Associating a Time-Off Type With a Payroll Item](#).
5. Specify the minimum tenure for this time-off type and whether the tenure is in months or years. Typically, minimum tenure is used to increase the amount of time off employees are entitled to.

over a specific period of time. However, it can also be used to adjust an accrual or carryover rule at an employment milestone.

For example, you might want employees to start with 10 vacation days. Then, set an increase after five years of employment to 15 vacation days. To do this, you would add two time-off rules to the plan using the same time-off type. One rule would have a minimum tenure of zero with an entitlement of 10 vacation days. The second rule would have a minimum tenure of five years with an entitlement of 15 vacation days.



**Note:** If you set a minimum tenure on a time-off rule, note the following. The associated payroll item appears on employee pay statements only after an employee has met the minimum tenure.

Next, set up accruals for the time-off rule. Consider whether you want time-off types to accrue by a fixed amount or by hours worked:

- [Setting up an Accrual Based on a Fixed Amount With Payroll](#)
- [Setting up an Accrual Based on Hours Worked With Payroll](#)

For more information, see [Accruals Based on Fixed Amounts](#) and [Accruals Based on Hours Worked](#).

## Setting up an Accrual Based on a Fixed Amount With Payroll

Use the following procedure to set up an accrual based on a fixed amount.

### To set up an accrual based on a fixed amount:

1. In the time-off rule, under **Accrual Method**, check the **Automatically Accrue** box.
2. From the **Accrues Based On** list, select **Fixed Amount Per Period**.
3. From the **Accrual Type** list, select whether you want to accrue time proactively or retroactively:
  - If employees accrue time off for the period they are about to work, select **Proactive**. Next, set the **Minimum Tenure**. If minimum tenure is set to zero, in the **Opening Balance for New Employees** field, choose one of the following:
    - **Full Amount for Accrual Period** - Employees' first accrual is the full amount specified for the accrual period. It is applied either on their start date, or the first day they are eligible to accrue based on the rules defined in their plan.
    - **Prorated Amount for Accrual Period** - Employees' first accrual is a prorated amount based on the number of working days remaining in the accrual period. It is applied either on their start date, or the first day they are eligible to accrue based on the rules defined in their plan.
    - **Zero** - Employees' first accrual takes place on the next regularly scheduled accrual date.
  - If employees accrue time off for the period they have already worked, select **Retroactive**.
4. In the **Accrual Frequency** field, choose when time off accrues.

If you select **Biweekly** or **Weekly** as the accrual frequency, set the day of the next accrual. This determines the calendar day on which the accrual is applied.



**Note:** Annual and monthly accruals occur on the first day of the year/month for proactive accruals. They occur on the last day of the year/month for retroactive accruals. Semi-monthly accruals occur on the first and the 15th day of each month for proactive accruals. They occur on the 15th and the last day of each month for retroactive accruals.

5. In the **Entitlement** field, enter the number of days or hours that employees earn each year.
6. In the **Entitlement Unit** list, select whether the entitlement is in days or hours.

The **Accrual Amount** and **Accrual Amount Unit** fields display the accrual rate based on your selections.

7. To enable an accrual limit, check the **Set Accrual Limit** box, and then do the following:

In the **Accrual Limit** field, enter the maximum number of days that employees can accrue. For example, if you enter 15 days, your employees stop accruing time when they reach this limit. Employees start accruing time again when they use some of their accrued time.

The **Accrual Limit Unit** field displays the accrual limit rate based on your selections.

8. Set up how you want to manage carryover balances:

- To deduct unused time off from an employee's balance, clear the **Allow Employees to Carry Over Unused Time-Off** box.

- To allow carryover, check the **Allow Employees to Carry Over Unused Time-Off** box. Then do the following:

- To restrict the unused time off added to the next year's balance, check the **Limit the Amount of Time-Off Employees Carry Over** box. Then, do the following:

1. In the **Maximum Carryover** field, enter the maximum amount of time off that each employee is entitled to carry over.

2. In the **Maximum Carryover Unit** field, select the unit of time for the maximum carryover field.

For example, employees are entitled to carry over 5 days. Enter 5 in the **Maximum Carryover** field, and then select **Days** in the **Maximum Carryover Unit** field.

- To expire carried over time off after a specific period of time, check the **Expire Unused Carryover** box. Then, select which month the carried over time off should expire.

For example, if you select March, employees have up until the end of March to take this type of time off. If they do not book the time before it expires, it is removed from their plan and they are no longer able to use it.



**Note:** If you select a month in the past, the expiry does not occur until the following year. If you change a carryover expiry month from a future date to a past date, the change does not occur until the following year. This is also true if you change a past date to a future date. However, the change can take effect in the current year. This is true if the existing expiry month is in the future, and it is changed to a future date.

- You can prevent employees from carrying over negative balances at the end of the year for this time-off type. Check the **Reset Negative Balances to Zero at Year End** box.
  - To display expiry notification messages to employees in the Employee Center, check the **Show Balance Expiry** box. Notifications appear in the Employee Center when employees have time off that expires within the current or the next calendar month.

9. Click **Save**.

Continue to [Updating the Employee Record for Time-Off Management and Payroll](#).

## Setting up an Accrual Based on Hours Worked With Payroll

Use the following procedure to set up an accrual based on hours worked.

### To set up an accrual based on hours worked:

1. In the time-off rule, under **Accrual Method**, check the **Automatically Accrue** box.
2. From the **Accrues Based On** list, select **Hours Worked (NetSuite U.S. Payroll)**.

3. Click **Save**.

Continue to [Updating the Employee Record for Time-Off Management and Payroll](#).

## Updating the Employee Record for Time-Off Management and Payroll



**Important:** This topic applies to you if you use SuitePeople U.S. Payroll in your NetSuite account.

After you create time-off rules in your time-off plans, you must assign a time-off plan to each of your employees. If some of your time-off plans include accruals based on hours worked, you must set up those accruals on the employee record.

### Assigning a Time-Off Plan to an Employee

Use the following procedure to assign a time-off plan to an employee.

#### To assign a time-off plan to an employee:

1. Go to Lists > Employees > Employees.
2. Beside an employee, click **Edit**.
3. In the **Time-Off** subtab, select a plan from the **Time-Off Plan** list.
4. In the **Start Date for Time-Off Calculations** field, enter the date for time-off calculations. The date is used to calculate the number of days that this employee is entitled to time off. It is based on the minimum and maximum tenures set within the time-off plan. If there is no value specified in this field, this employee cannot be assigned to a time-off plan.
5. Click **Save**.

### Adding Payroll Items to the Employee Record

To ensure payroll items associated with a time-off type appear on employees' pay statements, you must add the payroll items to each applicable employee record.



**Important:** Payroll items that accrue based on hours worked require additional setup. For more information, see [Setting up Accruals Based on Hours Worked On the Employee Record for Payroll](#).

#### To add payroll items to the employee record:

1. Go to Lists > Employees > Employees.
2. Beside an employee, click **Edit**.
3. Click the **Payroll** subtab, and then click the **Accrued Time** subtab.
4. In the **Sick/Vacation Time** list, select a payroll item.
5. Click **Save**.

When a payroll item is associated with a time-off type that accrues based on a fixed amount, the accrual appears on the employee's pay statement. It does not appear in the Accrued Hours field on the Accrued Time subtab.

## Setting up Accruals Based on Hours Worked On the Employee Record for Payroll

You must set up accrual rates for payroll items that accrue based on hours worked on each applicable employee record.

### To set up accruals based on hours worked for an employee:

1. Go to Lists > Employees > Employees.
2. Beside an employee, click **Edit**.
3. Click the **Payroll** subtab, and then click the **Accrued Time** subtab.
4. In the **Sick/Vacation Time** list, select a payroll item that accrues by hours worked. The **Accrues Based On** field is set to **Hours Worked (NetSuite U.S. Payroll)**.  
For example, you might have associated a time-off type with a payroll item called **PTO - Vacation**.
5. In the **Accrued Hours** field, enter a beginning balance if the employee has accrued time that is not in the system.  
After the beginning balance is set, the system keeps track of this total.
6. In the **Accrue As** list, select **Per Hour Worked**.



**Warning:** Selecting an option other than Per Hour Worked in the Accrue As list could result in inaccurate accrual balances on the employee's pay statement.

7. In the **Accrual Rate** field, enter the number of hours this employee accrues for each hour worked (for example, 0.04).
8. In the **Monetary Rate** field, enter the cost per hour of the accrued time.
9. Depending on whether your time-off policy allows carryover, do one of the following:
  - If you **do not** allow employees to carry over unused time off, check the **Reset at Year End** box. At the end of each calendar year, NetSuite sets the total accruals to zero and begins calculations again.
  - If you allow employees to carry over unused time off, **do not** check the **Reset at Year End** box.
10. If your company sets a limit for accrued time, in the **Maximum Hours** field, enter the maximum number of hours that can be accrued.
11. Click **Save**.

When a payroll item is associated with a time-off type that accrues based on hours worked, note the following. The employee's accrual appears in the Accrued Hours field and on the pay statement.

## Viewing an Employee's Time-Off Balance

To view an employee's time-off balance, go to Lists > Employees > Employees. On the Employees list, click **View** next to the employee whose time-off balance you want to check. Click the **Time-Off** subtab to view a summary of an employee's time-off balance for the entire year.

The **Available Now** subtab displays how much time off an employee has left, and how much they have used and scheduled for the current year. This subtab includes:

- **Available This Year** - If the **Days Available Includes Future Accruals** box on the Time-Off Plan page is checked, note the following. The time-off plan includes all future accruals and manual increases and decreases for the current year. For more information, see [Time-Off Plans](#).
- **Used This Year** - The amount of time off that has been used as of the current date.

- **Scheduled This Year** - The amount of time off that has been requested and approved, but not yet taken.
- **Available Now** - The total remaining time off for the current year.

The **Balances** subtab displays an employee's available balance as of the current date. This balance is based on the accruals and carry over rules defined in the time-off plan. This subtab includes:

- **Carried Over** - The amount of time off that has carried over as of the current date.
- **Accrued** - The amount of time off that has accrued as of the current date.
- **Used** - The amount of used time off.
- **Expired Carryover** - The amount of time off that has expired as of the current date.
- **Balance** - Displays the balance as of the current date based on the amount of time carried over, accrued, used, and any expired carry over.

## Time-Off Changes

When an employee accrues time off, uses time off, or when time-off expires or is carried over, NetSuite creates a time-off change record. If you need to make a change to an employee's time-off balance, you can create or adjust a time-off change record.

For more information, see the following topics:

- [Viewing Time-Off Changes](#)
- [Creating a Time-Off Change](#)

## Viewing Time-Off Changes

The Time-Off Changes page displays a list view of all the time-off change records for the employees at your company. Time-off change records are created when time-off requests are approved, and when manual adjustments are made. These records are also created when carryover is applied, when time off expires, and when automatic accruals are calculated. Each of these changes are individually recorded so that you can distinguish between different types.

### To view time-off changes:

1. Go to Setup > HR Information System > Time-Off Change.  
The Time-Off Change page displays a list of all time-off changes, sorted by most recent changes.
2. To filter the list of time-off changes, expand the **Filters** section, and try the following:
  - To find time-off changes for a specific employee, from the **Employee** list, select the employee. To make multiple selections, hold down the Ctrl key.
  - To view time-off changes by time-off types, in the **Time-Off Type** list, select a time-off type. To make multiple selections, hold down the Ctrl key.
  - To view time-off changes by time-off change type, from the **Time-Off Change Type** list, select a time-off change type.



**Note:** When a time-off request for a future date that was previously approved is rejected, the associated time-off change record is deleted.

## Creating a Time-Off Change

You can manually adjust an employee's time-off balance for any of the time-off types that are part of the employee's plan. If needed, you can correct mistakes to time-off balances by deleting the existing

time-off change and submitting a new one. You can also submit a new time-off change with the required adjustment. You often need to create or edit a time-off change if an approved time entry is edited.

You cannot create a time-off change for yourself or make adjustments to your own time-off balance.



**Note:** To preserve employee data for auditing purposes, you cannot delete employee records for employees whose time-off balances have been changed. Instead, you should deactivate these employee records.

### To adjust an employee's time-off balance:

1. Go to Setup > HR Information System > Time-Off Change > New.
2. Select the employee and the time-off type that you want to make the adjustments to.
3. In the **Amount** field, enter either a negative or positive value.
4. In the **Amount Specified In** field, specify if this amount is in hours or days.



**Note:** When days is selected, the amount saves and displays in hours on the time-off change record. For example, you enter two days. It appears as 16 hours on the record when the employee's work calendar is set to an eight-hour work day. For more information, see the help topic [Setting Up a Work Calendar](#).

5. Enter the date when you want to apply this change.
6. If required, enter a description.
7. Click **Save**.

To delete a time-off change record, go to Setup > HR Information System > Time-Off Change. From the list page of all the time-off change records, click **Edit** next to the time-off change record you want to delete. From the **Actions** menu, select **Delete**. At the prompt, click **OK** to confirm the action.

## Submitting Time-Off Requests on Behalf of Employees as an Administrator

You can submit a time-off request on behalf of employees. The employee must be active and have available time-off entitlements.

Common scenarios where this feature is useful include:

- Submitting requests for employees who are sick or have emergencies.
- Consolidating time-off balances for employees who may have missed submitting time-offs.

### To submit a time-off request on behalf of an employee:

1. Go to Setup > HR Information System > Time-Off Request.
2. Click **New Time-Off Request**.
3. On the Request Time-Off page, check that **Submit On Behalf Of** is switched on.

**Request Time-Off**

Employee \*     Auto-Approve

Dates \*  to

Message to Approver

Back | Submit

4. In the **Employee** field, type the employee's name. As you type, suggested names appear that match what you have typed.
  5. Click a name or press Enter to select the first employee on the list.
  6. Note that the **Auto-Approve** box is checked by default so the request is automatically approved upon submission.
- (Optional) If you want the employee's supervisor to review the request, clear this box.



**Note:** This box is checked and unavailable when:

- The employee selected is set up as a time-off self-approver.
- The time-off type you select is set up for auto-approval and the request duration is within the auto-approval threshold.

7. Specify the start and end dates of your request.

After you specify the date range using the calendar, each day appears in chronological order.

## Request Time-Off

[Back](#) | [Submit](#)

**Employee \***  
 [x](#) [Search](#)  Auto-Approve

**Dates \***  
 **to**

TUE	APRIL 06	SICK	All day		No coworkers away
WED	APRIL 07	SICK	All day		No coworkers away
THU	APRIL 08	SICK	All day		No coworkers away

**Message to Approver**

**Summary**  
 You are requesting 3 Sick days from April 6th to April 8th 2021.

8. For each date in your request, select the type of time-off you are requesting. If the time-off type you select has multiple days available, the corresponding date entries in the list are automatically filled.  
 You can also use a combination of time-off types for a time-off request.
9. To change a time-off type or adjust the duration of the time off, click the **Edit** icon beside the entry that you want to change.
10. Make any required changes in the popup window that appears, and click **Done**.
11. Review the summary box for a breakdown of your request, and then click **Submit**.

An email is sent to the employee's supervisor informing them of the request.

# Approving or Rejecting a Time-Off Request as an Administrator



**Note:** You cannot approve or reject your own time-off request.

## To approve or reject a time-off request:

1. Go to Setup > HR Information System > Time-Off Request.
2. Select **View** beside the time-off request that you want to approve or reject.
3. To approve the request, click **Approve**.
4. To reject the request, click **Reject**. Optionally, enter a reason for the rejection, and then click **OK**.

## Rejecting an Approved Time-Off Request

Employees might submit a time-off request that is approved by their manager or an administrator. Then, decide to work during that time or part of that time. In many cases, you can reject the time-off request to accurately update the employee's available time-off balance. If you are using SuitePeople U.S. Payroll, however, rejecting an approved time-off request might require that you complete additional steps.

## Time-Off Requests That Appear on a Calculated Payroll Batch

### To reject an approved time-off request that appears on a calculated payroll batch:

1. Remove the employee's paycheck from the payroll batch. See the help topic [Removing Paychecks from a Batch](#).
2. Reject the time-off request. See [Approving or Rejecting a Time-Off Request as an Administrator](#).
3. Add the employee back to the payroll batch. See the help topic [Adding Employees to a Payroll Batch](#).
4. Calculate the payroll batch again. See the help topic [Calculating a Payroll Batch](#).

## Time-Off Management for Employees or Managers

With the NetSuite Time-Off Management feature, you can get approval for time off before you take it. You can create and submit time-off requests from the Book Time Off button on the Time-Off portlet on the Employee Center home page. The types of time off and the rules that apply to your time-off plan are based on your company policies. They are set up by your HR administrator. After you submit a time-off request, an email notification is sent to the approver.



**Note:** To use time-off management as an employee or manager, you must use your Employee Center role.

## Submitting Time-Off Requests

### Requesting Time Off from NetSuite's Employee Center

Use the following procedure to submit a time-off request.

### To submit a time-off request:

1. From the home page of your Employee Center, in the **Time-Off** portlet, click **Home**.
2. Click **Request Time-Off**.
3. On the Request Time-Off page, specify the start and end dates for your time-off request.

You cannot enter time off for days that are not a part of your work week. Non-working days and pending or approved whole day requests are grayed out and cannot be selected.



**Note:** To request only one day off, click the day you want off in the calendar twice. The Dates field will automatically populate with the specified date.

After you specify the date range using the calendar, each day is displayed in chronological order.

The screenshot shows the 'Request Time-Off' page. At the top, there are 'Submit' and 'Cancel' buttons. Below them is a 'Dates\*' section with two date pickers showing 'February 06, 2017' and 'to' 'February 13, 2017'. A large calendar grid for February 2017 is displayed, with days from Monday, February 6 to Sunday, February 12. The days from February 6 to 10 are highlighted in blue, indicating they are available for vacation. A tooltip for February 6 states: 'Days available accounts for time-off already approved for this year.' The days from February 11 to 13 are highlighted in green, indicating they are available for sick days. A tooltip for February 11 states: '3.5 days available'. The days from February 12 to 13 are highlighted in yellow, indicating they are available for flex days. A tooltip for February 12 states: '3 days available'. The days from February 11 to 13 are also highlighted in yellow, indicating they are available for flex days. A tooltip for February 13 states: '2 days available'. Below the calendar, there is a text area labeled 'Include a message to help make your case' containing the text 'Requesting 6 days of vacation.' At the bottom are 'Submit' and 'Cancel' buttons.

4. For each date in your request, select the type of time off you are requesting. If the time-off type you select has multiple days available, the corresponding date entries in the list are automatically filled for you.

For example, if you select **Vacation** with three days available, the first three days in the list are tagged as vacation days.

You can also use a combination of time-off types for a time-off request. For example, you can specify that you want to use a combination of vacation days and floating holidays.

The displayed days available takes into account time off that has already been approved for the year, but that you have not taken.

If the time-off type is tagged as track only, no time off is accumulated, and only your usage is tracked. For example, you have no limit to the number of sick days that you can take. The sick day time-off type is tagged as track only.



**Note:** If your company lets you carry over unused time, and you are booking time off for next year, note the following. You do not see your carryover balance in the forecasted balance. Your carryover days are calculated at the end of the year to ensure you do not overbook your time off for next year.

- To change a time-off type, or adjust the duration of the time off, click the **Edit** icon beside the entry that you want to change. Make any required changes in the popup window that appears, and click **Done**.

**Request Time-Off**

**Submit** **Cancel**

Dates\*  
 to

MON	FEBRUARY 06	VACATION	All day	<input type="button" value="Edit"/>
TUE	FEBRUARY 07	VACATION	All day	<input type="button" value="Edit"/>
WED	FEBRUARY 08	VACATION	All day	<input type="button" value="Edit"/>
THU	FEBRUARY 09	VACATION	0.5 day	<input type="button" value="Edit"/>
FRI	FEBRUARY 10			<input type="button" value="Edit"/>
MON	FEBRUARY 13			

Type\*

Duration\*

**Done** **Cancel**

Include a message to help make your case

**Submit** **Cancel**

If your request exceeds the days you have available, a warning icon appears beside the request. If your request overlaps with another employee's request, a notification icon appears beside the request. Neither of these icons prevent you from submitting your request. For more information, hover over the icon, and make any necessary changes.

**Wait!**  
You are requesting **4 Vacation days** which is more than the **3.5 days** available.  
**You might want to change the requested days.** If you're sure, click **Submit**

**Request Time-Off**

**Submit**   **Cancel**

**Dates\***  
February 06, 2017 to February 13, 2017

MON	FEBRUARY 06	VACATION	All day	
TUE	FEBRUARY 07	VACATION	All day	
WED	FEBRUARY 08	VACATION	All day	
THU	FEBRUARY 09	VACATION	All day	
FRI	FEBRUARY 10	FLEX	All day	
MON	FEBRUARY 13	FLEX	All day	

**Wait!**  
Some of your co-workers will also be away.  
 Jonathan Larson  
From February 6 to February 13, 2017

**Wait!**  
You are requesting **4 Vacation days** which is more than the **3.5 days** available. **You might want to change the requested days.** If you're sure, click **Submit**

Include a message to help make your case  
Requesting 6 days of vacation.

6. Optionally, you can include a message to your approver.
7. Review the summary box for a breakdown of your request, and then click **Submit**.

A request is sent by email to your approver. For time-off types set with automatic calendar event creation, calendar events will be created after the request is approved. The event can be viewed in your Calendar portlet and includes your assigned supervisor as an attendee. To view the status of your time-off request, in the **Time-Off** portlet, click **Requests**. For more information, see [Viewing Time-Off Requests](#).

## Submitting Time-Off Requests on Behalf of Employees as a Manager

Managers may only submit requests on behalf of employees who are direct reports. The employee must be active and have available time-off entitlements.

Common scenarios where this feature is useful include:

- Submitting requests for employees who are sick or have emergencies.
- Consolidating time-off balances for employees who may have missed submitting time-offs.

### To submit a time-off request on behalf of an employee:

1. From the home page of your Employee Center, in the **Time-Off** portlet, click **Home**.
2. Click **Request Time-Off**.
3. On the Request Time-Off page, click **Submit On Behalf Of**.

The screenshot shows the 'Request Time-Off' page. At the top right is a 'More' link and a 'Submit on behalf of' toggle switch, which is checked. Below the toggle is a 'Back' button and a blue 'Submit' button. The main form area has three sections: 'Employee \*' with a search bar containing 'I am requesting on behalf of' and an 'Auto-Approve' checkbox (which is checked and dimmed), 'Dates \*' with two date pickers separated by a 'to' label, and 'Message to Approver' with a large text input field. At the bottom are the same 'Back' and 'Submit' buttons.

4. In the **Employee** field, type the employee's name. As you type, suggested names appear that match what you have typed.
5. Click a name or press Enter to select the first employee on the list.
6. Note that the **Auto-Approve** box is checked and dimmed by default so the request is automatically approved upon submission.
7. Specify the start and end dates of your request.

After you specify the date range using the calendar, each day appears in chronological order.

## Request Time-Off

[Back](#) | [Submit](#)

**Employee\***

x
🔍
 Auto-Approve

**Dates\***

to

TUE	APRIL 06	SICK	All day		No coworkers away
WED	APRIL 07	SICK	All day		No coworkers away
THU	APRIL 08	SICK	All day		No coworkers away

**Message to Approver**

**Summary**

You are requesting 3 Sick days from April 6th to April 8th 2021.

8. For each date in your request, select the type of time off you are requesting. If the time-off type you select has multiple days available, the corresponding date entries in the list are automatically filled. You can also use a combination of time-off types for a time-off request.
9. To change a time-off type or adjust the duration of the time off, click the **Edit** icon beside the entry that you want to change.
10. Make any required changes in the popup window that appears, and click **Done**.
11. Review the summary box for a breakdown of your request, and then click **Submit**.

For time-off types set with automatic calendar event creation, calendar events will also be created. The event can be viewed in your Calendar portlet and includes the employee as an attendee.

## Viewing Time-Off Requests

Use the following procedure to view time-off requests.

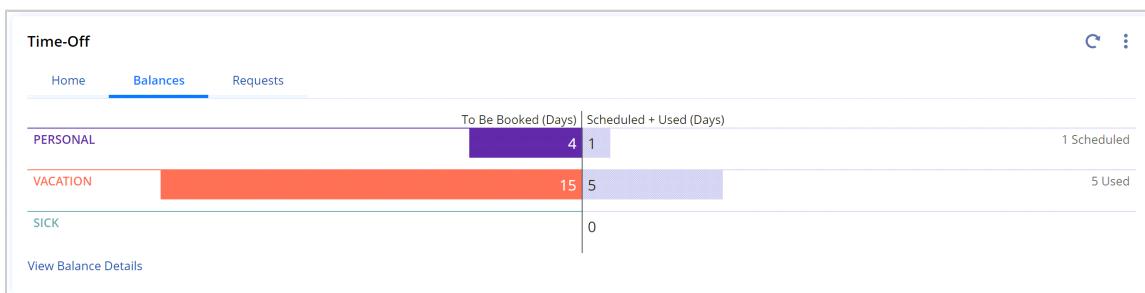
### To view time-off requests:

1. From the home page of your Employee Center, in the **Time-Off** portlet, click **Requests**.

2. To see more time-off requests, in the portlet, click **View All Requests**.
3. On the Time-Off Request page, you can:
  - See the current status of the request, who submitted it, the date range, and the time-off types used for the request.
  - Use the **Filters** section to find a specific time-off request, or view a history of requests for a specific employee, or a specific status. To make multiple selections, hold down the Ctrl key.
  - Click **View** beside a time-off request to see the original request.
4. To export the information, in the header row above the list, click one of the following icons:
  - the CSV Export icon
  - the Excel icon
  - the PDF icon
5. To print the list of time-off requests, click the Printer icon.

## Viewing Time-Off Balances

From the Time-Off portlet in the Employee Center, you can see a summary of time-off balances, pending requests, and any upcoming booked time-off for yourself. If your role has the appropriate permission, you can also view time-off information for your subordinates.



**Note:** Your time-off balances are view only and cannot be edited. If you see something that is incorrect, contact your HR administrator.

### To view time-off balances:

1. From the home page of your Employee Center, in the **Time-Off** portlet, click **Balances**. By default, your balance is displayed in days.
- Tip:** To view time-off balances in hours instead of days, click the **More** icon, and then select **Switch to Hours**.
2. To see a list of pending requests, upcoming time-off, and past time-off, or to view your balance in hours, click **View Balance Details**.

## Approving or Rejecting Time-Off Requests

If your role has the appropriate permission, you receive an email notification when you have time-off requests that require approval. Using links in the body of the email, you can directly approve or reject the request. For time-off types set with automatic calendar event creation, calendar events will also be created after you approve the request. The event can be viewed in your Calendar portlet and includes the employee as an attendee.

Watch the following help video for information about approving or rejecting time-off requests:



[Reviewing Time-Off Requests](#)

## Quickly Approving or Rejecting Time-Off Requests

Use the following procedure to approve or reject time-off requests.

### To quickly approve or reject a time-off request:

1. Do one of the following:
  - From the home page of your Employee Center, in the **Home Links** portlet, under **Time-Off**, click **Approve Time-Off Requests**.
  - From the email notification, use the links to take action on the request:
    - To approve the request, click **Approve**.
    - To reject the request, click **Reject**. Optionally, enter a reason for the rejection, and then click **OK**.

A specific day in a multiple day time-off request cannot be rejected. The entire request will have to be rejected.

Rejected time-off requests cannot be resubmitted.

## Reviewing Details of a Specific Request

You can view more details of a specific request. For example, whether the employee has enough time-off balance for the request.

### To review details of a specific request before you approve it:

1. From the email notification, click **View Record**.
2. On the Request Time-Off page, review the details of the request.

The screenshot shows a web-based application interface for managing time-off requests. At the top, there's a blue header bar with a house icon and the text "Request Time-Off". Below the header, there are three buttons: "Approve" (highlighted in blue), "Reject", and "Cancel". The main content area displays a user profile picture of Emma Swan and her name. Below the profile, it says "VOLUNTEER TIME REQUEST • Pending Approval". At the bottom of the content area, there's a date range "FRI DECEMBER 30" followed by a "VOLUNTEER TIME" label and an "All day" indicator. To the right of the date range, there's a yellow warning icon. At the very bottom of the page, there are the same "Approve", "Reject", and "Cancel" buttons as at the top.



**Tip:** If the request exceeds the employee's available days or conflicts with a holiday, a warning icon (⚠) appears beside the request. If the request overlaps with another employee's time-off request, a notification icon appears beside the request. For more information, hover over the icon.

- Click **Approve**, **Reject**, or **Cancel**.

If you click **Reject**, you are prompted to enter a comment, which is sent to the employee.



**Note:** A rejected request cannot be resubmitted or canceled.

## Viewing all Time-Off Requests Waiting for Approval

### To view all time-off requests waiting for approval:

- From the home page of your Employee Center, in the **Home Links** portlet, under **Time-Off**, click **Approve Time-Off Requests**.



**Tip:** If the request exceeds the employee's available days or conflicts with a holiday, a warning icon (⚠) appears beside the request. If the request overlaps with another employee's time-off request, a notification icon appears beside the request. For more information, hover over the icon.

**Review Time-Off Requests**

Sandra Meyer VACATION REQUEST	OCTOBER <b>19</b> WED to OCTOBER <b>20</b> THU 2 days (16 hours)	<b>Approve</b> View Request ✓ Available hours/days ✓ No schedule conflicts
Jeffrey Matthews Requesting 9 days of vacation. VACATION REQUEST	NOVEMBER <b>8</b> TUE to NOVEMBER <b>18</b> FRI 9 days (72 hours)	<b>Approve</b> View Request ⚠ Insufficient hours/days ⚠ Possible schedule conflicts
Sandra Meyer Requesting 8.5 days of vacation. VACATION REQUEST	NOVEMBER <b>8</b> TUE to NOVEMBER <b>18</b> FRI 8.5 days (68 hours)	<b>Approve</b> View Request ✓ Available hours/days ⚠ Possible schedule conflicts
Jonathan Larson Requesting 2 flex days. FLEX REQUEST	DECEMBER <b>24</b> TUE to DECEMBER <b>25</b> WED 2 days (16 hours)	<b>Approve</b> View Request ✓ Available hours/days ✓ No schedule conflicts ⚠ Conflicts with holidays
Rose Jordan Logging two sick days. SICK DAY REQUEST	OCTOBER <b>10</b> MON to OCTOBER <b>11</b> TUE 2 days (16 hours)	<b>Approve</b> View Request ✓ Available hours/days ✓ No schedule conflicts

- Do one of the following:

- To approve a request, click **Approve**.
- To reject a request, click **View Request**, and then click **Reject**. You are prompted to enter a comment, which is sent to the employee.



**Note:** A rejected request cannot be resubmitted.

## Canceling Time-Off Requests

After you submit a time-off request, you can cancel pending and approved time-off requests for a future date. Time-off calendar events will be deleted when you cancel an approved time-off request.



**Note:** Approved time-off requests that are associated with a locked timesheet cannot be canceled. If your time-off balances need to be corrected because you did not take scheduled time off, contact your administrator.

### To cancel a time-off request:

1. From the home page of your Employee Center, in the **Time-Off** portlet, click **Requests**.
2. Select the time-off request that you want to cancel.
3. Click **Cancel Request**.

## Time-Off Reports

The Time-Off Management feature includes a variety of reporting capabilities and saved searches that you can use to retrieve, present, and analyze your time-off data:

- [Available Time-Off Report](#)
- [Time-Off Balance Summary Report](#)
- [Time-Off Balance Details Report](#)
- [Time-Off Tracking Reports](#)
- [Time-Off Management Ad Hoc Reports](#)

For more information, see the help topic [Reporting Overview](#).

## Time-Off Management Ad Hoc Reports

You can create ad hoc reports to fit the specific needs of your company. For an ad hoc report, select the type of data you want to report on and the format of the report. Then, decide how you want to subtotal and group the information displayed on the report.

To create a report, go to Reports > New Report. Then, choose the data metric to include in your report. For Time-Off Management, the two available metrics are Available Time-Off and Time-Off Balance Adjustments.

For more information, see the help topics [Ad Hoc Reports](#) and [Choices for Ad Hoc Reports](#).

# Performance Management

SuitePeople HR's Performance Management features help ensure that employees are on track to meet their career goals and objectives. The following three tools are included in the Performance Management feature:

- [Goal Management](#)– Enables employees to create and track goals in collaborations with their managers.
- [Performance Reviews](#) – Enables the set up of performance reviews to help employees and managers assess their performance.
- [Areas of Focus](#) – Enables employees to reflect and plan their career management in collaboration with their managers.

The Performance Management tools must be enabled in NetSuite before they can be used. For more information, see [Performance Management Prerequisites](#).

Employees can also recognize the accomplishments, achievements, or milestones of their coworkers by giving [Kudos](#). Kudos must be activated separately from the other Performance Management tools.

## Goal Management and Performance Reviews

With the Performance Management feature, you can track and review employee performance. Performance Management includes the following tools:

- [Goal Management](#)– Employees can create and manage their own goals. Managers can approve and interact with the goals of their employees. You can also set up email notifications and access performance metrics.
- [Areas of Focus](#)– Employees can create and manage their own areas of focus. Managers can create areas of focus for their employees.
- [Performance Reviews](#)– You can create performance reviews and schedule them for an employee or groups of employees. As a reviewer, can edit and comment on employees' self-reviews. When performance reviews are completed, the employee's completed goals and kudos are shown.
- [Performance Management Saved Searches](#)– You can use saved searches to find information about and inside goals and performance reviews. You can customize saved searches to show the information you need.
- [Performance Management Workbook](#)– Using SuiteAnalytics Workbook, you can use and customize workbook and dataset templates for goals and performance reviews.

To use the Performance Management feature, you must activate it on your account. See [Performance Management Prerequisites](#)

## Performance Management Prerequisites

Before you can use the Performance Management feature, you need the following:

- SuitePeople HR. Contact your NetSuite account manager about setting up SuitePeople HR and Performance Management in your NetSuite account. For more information, see [SuitePeople Overview](#).
- You need to enable the Performance Management feature in your account. For more information, see [Enabling the Performance Management Feature](#).

- Your role needs to have the Talent Administration permission with the full access level. Standard roles that include this permission are Human Resources Generalist, Administrator, and Chief People Officer (CPO). For more information, see [Performance Management Permission Requirements](#).

## Enabling the Performance Management Feature

Before you can use the Performance Management feature, you need to enable it in your account.

### To enable the Performance Management feature:

- Go to Setup > Company > Enable Features.
- Select the **Employees** subtab.
- Scroll down to the Performance Management section, and check the **Performance Management** box.
- Click **Save**.

## Performance Management Permission Requirements

If the Performance Management feature is enabled in your account, any roles that have the Talent Administration permission can access goal and performance review information. With this permission you can:

- Create metrics for tracking employee performance
- View, deactivate, and delete employees' goals
- Create and manage performance review questions, rating scales, and templates
- Create, schedule, and approve performance reviews
- Edit, delete, and cancel performance reviews

The Talent Administration permission is located on the Lists subtab of the Role page. By default, the standard Human Resources Generalist, Administrator, and Chief People Officer (CPO) roles include the Talent Administration permission.

For a list of standard roles and their permissions, see the help topic [Standard Roles Permissions Table](#). You can also create custom roles that include this permission. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

Permission	Permissions Subtab	Permission Access Level	Supported Functionality
Talent Administration	Lists	View	Allows you to view and search for goal and performance review information. You can view goals and performance reviews for employees. You can also view performance metrics, performance review questions, performance review rating scales, and performance review templates. You cannot create or edit goals or performance reviews.
		Full	You can create and edit only your own goals. You can approve and delete goals. You can create, edit, or delete performance metrics, performance review questions, performance review rating scales, performance review templates, performance reviews, and performance review schedules, with

Permission	Permissions Subtab	Permission Access Level	Supported Functionality
			some limitations. You can also approve and cancel performance reviews.

## Goal Management

Goal management includes the following:

- [Goal Management for Employees and Managers](#)
  - Employees can create their own goals in collaboration with managers. They can record decisions and conversations by adding comments to goals.
  - Employees can manage current and past goals to identify key trends.
  - Managers and employees can set up notifications for goals at key events.
  - After goals are closed, employees and managers can write reflections on the outcome.
- [Goal Tracking with Performance Metrics](#)
  - Access real-time data in NetSuite to automatically update the actual value of a goal. NetSuite provides default performance metrics, and you can create your own.
- [Goal Saved Searches](#)
  - Use saved searches to find information about goals in your organization.
- [Performance Management Workbook](#)
  - You can use the performance management datasets and workbook templates to analyze goal information for the employees in your organization.

## Goal Management for Employees and Managers

With the Performance Management feature, you can create, manage, and set targets for your own goals. You can use performance metrics to automatically update the actual value of your goal with data from NetSuite. You can also associate your goals with an area of focus.

If you are a manager, you are responsible for approving your direct reports' planned goals. Your direct reports cannot change the status of goals to in progress until they are approved. You can comment on your direct reports' goals to provide guidance, but you cannot edit your direct reports' goals or create goals for them.

The best way to manage goals is to use your Employee Center role. You can also manage your goals at Setup > Performance Management > Goals.

Watch the following help video for information about managing your own goals in the Employee Center:



[Managing Goals in the Employee Center](#)

Watch the following help video for information about interacting with the goals of your direct reports in the Employee Center:



Learn more in the following topics:

- [Creating Goals](#)
- [Approving Goals](#)
- [Adding Comments to Goals](#)

- [Editing Goals](#)
- [Inactivating Goals](#)
- [Viewing Goals](#)
- [Closing Goals](#)

## Creating Goals

With the Performance Management feature, you can create and manage goals for yourself.

### To create a goal:

1. From the home screen of your Employee Center role, go to Talent > Goals.
  2. Click **New Goal**.
  3. In the **Goal Name** field, enter a name for the goal.
  4. In the **Details** field, describe the goal and how you plan to achieve it.
  5. If you have at least one ongoing area of focus, you can select it to associate with your goal from the **Area of Focus** list.
  6. From the **Start Date** field, select the date you plan to start working on the goal. You can change this date at any time.
  7. In the **Target Completion Date** field, select the date you plan to complete the goal. You can change this date at any time.
  8. (Optional) To set a target for your goal and to track if you are achieving that target, do the following:
    - a. Choose **Manual** or **Performance Metric** to determine how to track your goal.
    - b. If you track your goal manually, from the **Format** list, select to track your goal as a number, percent, or currency.
    - c. If you track your goal with a performance metric, from the **Performance Metric** list, select a performance metric. For example, to track how many customers you gain, use the performance metric New Customers. If you use a performance metric, when you move the goal to in progress, NetSuite updates the **Actual** field.
-  **Tip:** Click the info icon to read a description of the performance metric you select.
- d. In the **Start** field, enter a number that represents the value that you achieved before the start date.
  - e. In the **Target** field, enter a number that represents the value that you want to achieve. For example, if you want to gain three new customers, enter 3 in the Target field.
9. Click **Save**.

After you save a goal, your manager receives an email notification. Your manager needs to approve your goal before you can change the status from planned to in progress. After your manager approves your goal, you can no longer make changes to the Name and Details fields.

## Approving Goals

If you are a manager, approving a goal is an opportunity for you to provide input on the employee's goal. This step is required before employees can change the status of their goals to in progress.

You cannot reject a goal. Instead, add comments to the goal, or meet with your employee to discuss any changes that need to be made before the goal can be approved.

## To approve a goal:

1. From the home screen of your Employee Center role, go to Talent > Goals.
2. From the list of your direct reports, select a direct report.
3. From the **Planned** column, click a goal. Goals that require approval have a **Pending Approval** banner.
4. Review the goal details, targets, and dates.



**Note:** After you approve a goal, the employee can no longer edit the Goal Name and Details fields. Ensure these fields are acceptable before you approve a goal.

5. (Optional) To add a comment to the goal, click the **Comments** subtab. Enter a comment, and then click **Submit**.
6. To approve the goal, in the **Goal** subtab, click **Approve**.

After you approve a goal, an email notification is sent to the employee.

## Adding Comments to Goals

As an employee, you can add comments to your goals to keep your manager up-to-date on your progress.

As a manager, you can add comments to your employees' goals to provide guidance. After you add a comment to a goal, NetSuite notifies your employee.

## To add a comment to a goal:

1. From the home screen of your Employee Center role, go to Talent > Goals.
2. From the list of your direct reports, select a direct report.
3. Click the goal that you want to add a comment to.
4. Click the **Comments** subtab.
5. Enter your comment.
6. Click **Submit**.

After you submit a comment, you cannot edit or delete it.

## Editing Goals

As an employee, you are the only one who can edit your own goals. If your manager has not yet approved a goal, you can change the name of the goal and the goal details. You can change the status of your goal only after your manager approves it.

## To edit your goals:

1. From the home screen of your Employee Center role, go to Talent > Goals.
2. Click the goal that you want to make changes to.
3. Do any of the following:
  - If your manager has approved your goal, you can change your goal's status. To change the status of your goal, from the **Status** field, select one of the following statuses:
    - **Planned** - The initial status for goals that you create.

- **In Progress** - You are ready to start working on the goal. When you set the status of a goal with a performance metric to In Progress, the Actual field is updated with the actual value of your goal.
- **Completed** - The goal is completed.
- **Not Completed** - The goal was not completed by the target completion date. If you can continue to work on the goal, update the target completion date to give yourself more time.
- **Canceled** - The goal was canceled (for example, it is no longer relevant).



**Tip:** To update the status of a goal, from the Goals page, you can move the goal into a status column. You can also reorder goals within a column so that the sequence better reflects your priorities.

- To add an Area of Focus from a goal, click the dropdown menu and select the area of focus. To remove an Area of Focus from a goal, click **X** in the dropdown menu.



**Note:** When you edit an area of focus, the changes are reflected on all goals that are linked to the area of focus.

- To change the start date or target completion date of the goal, enter new dates in the **Start Date** or **Target Completion Date** fields.
  - To indicate how you feel about the status of your goal, select a **Mood**:
    - **On Track** – You are on track to achieve your goal.
    - **Behind** – You are behind on achieving your goal.
    - **At Risk** – You are at risk to miss your goal.
  - To change the performance tracking method for your goal, choose either **Manual** or **Performance Metric**.
  - To change the format for a manually tracked goal, from the **Format** list, select a format.
  - To change the performance metric of your goal, from the **Performance Metric** list, select a performance metric.
  - To change the value you completed when your goal started, in the **Start** field, enter a number.
  - To change the value you want to achieve, in the **Target** field, enter a number.
  - To update the actual value of your goal, in the **Actual** field, enter a number.
- If you are using a performance metric to track the actual value of your goal, you cannot enter a number here.
- To add comments to your goal, see the help topic [Adding Comments to Goals](#).

4. When you finish editing, click **Save**.

## Inactivating Goals

You can deactivate only your own goals. When you deactivate a goal, it no longer appears on the Goals page in your Employee Center.

### To deactivate a goal:

1. Go to Setup > Performance Management > Goals.
2. Beside the goal you want to make inactive, click **View**.
3. Click **Edit**.
4. Check the **Inactive** box.

5. Click **Save**.

To view inactive goals, click **Search** from the list page view. Select **Yes** beside the **Inactive** field and click **Submit**.

## Viewing Goals

Employees can view their own goals. Managers can view their own goals and the goals of their direct reports. Employees and managers can also use the Goals portlet to view their own goals and the goals of their direct reports. Goals that are closed for three months no longer appear on the Goals page, but you can still view them on the All Goals page.

### Viewing the Goals of Your Direct Reports

If you are a manager, you can view the goals of your direct reports. You cannot create or edit goals for your direct reports, but you can provide feedback by adding comments to their goals. You must approve your direct reports' planned goals before your direct reports can move the goals to in progress. For more information about approving goals, see the help topic [Approving Goals](#).

#### To view the goals of your direct reports:

1. From the home screen of your Employee Center role, go to Talent > Goals.
2. From the **My Team** list, select a direct report.
3. Click the goal that you want to view.

### Viewing Goals in the Goals Portlet

The Goals portlet provides an overview of your own goals and the goals of your direct reports. The Goals portlet can be added to any dashboard.



**Tip:** Click the name of any goal in the portlet to view the goal card on the Goals page.

Portlet Tab	Description
My Actions	<p>Displays the following information about your own goals:</p> <ul style="list-style-type: none"> <li>■ <b>Goals Starting Soon</b> — Displays goals that are starting in two weeks or less.</li> <li>■ <b>Goals Due Soon</b> — Displays goals that are due in two weeks or less. If a goal is not started or closed on time, the start date and target date can be updated. Only goals approved by your manager are displayed.</li> <li>■ <b>Overdue Goals</b> — Displays goals that are not started on time and goals that are not closed on time. If a goal is not started on time, the date in the Start Date column is bold. If a goal is not closed on time, the date in the Target Completion Date column is bold.</li> </ul>
My Goals	<p>Displays progress, time elapsed, and days remaining for the three goals that are on the top of the In Progress column on your Goals page.</p>
Team Actions	<p>Displays the following information about the goals of your direct reports:</p> <ul style="list-style-type: none"> <li>■ <b>Approval Required</b> — Displays goals that you must approve. For more information, see the help topic <a href="#">Approving Goals</a>.</li> <li>■ <b>Overdue Goals</b> — Displays goals that are not started on time and goals that are not closed on time. If a goal is not started on time, the date in the Start Date column is bold. If a goal is not closed on time, the date in the Target Completion Date column is bold.</li> <li>■ <b>Reflect on Goals</b> — Displays goals closed within the last three months that you have not yet written a reflection for. For more information, see the help topic <a href="#">Closing Goals</a>.</li> </ul>

Portlet Tab	Description
	<p><b>Note:</b> This tab appears only if you are assigned as a supervisor to at least one employee in NetSuite. If you use the portlet in your Employee Center role, this tab appears on the Manager Dashboard.</p>
Team Goals	<p>Displays all the goals of your direct reports that are in progress. Goals are displayed in a scatter plot graph by progress and time elapsed.</p> <p><b>Note:</b> This tab appears only if you are assigned as a supervisor to at least one employee in NetSuite. If you use the portlet in your Employee Center role, this tab appears on the Manager Dashboard.</p> <p><b>Note:</b> The legend and criteria of the graph are interpretations. Review your employees' goals with them to notified of their progress.</p>

## Viewing All Goals

The All Goals page enables you view all your goals and all the goals of your direct reports in one place. You can filter the All Goals page to search for and view specific goals.

### To view all goals:

- From the home screen of your Employee Center role, go to Talent > Goals.
- At the bottom of the Closed column, click the **Looking for all your goals?** link.

**Note:** If you select a direct report from the **My Team** list, the link appears at the bottom of the Closed column with that employee's name. For example, if you select John Smith from your My Team list, you will see the following link: **Looking for all goals for John Smith?**

- If you want to filter the All Goals page, do any of the following:
    - To filter by employee, In the **Employee** list, click an employee's name to view or hide their goals in the table.
- Note:** If you do not have direct reports, you can only view your own goals on the All Goals page.
- To filter by goal name, in the **Search by Goal** field, search for a goal.
  - To filter by closed date, from the **Closed Date Range** fields, enter a date range.
  - To filter by status, from the **Status** list, select a status.
  - To filter by performance metric, from the **Performance Metric** list, select a performance metric.
  - To filter by an area of focus, select one from the **Area of Focus** list. You can only use this filter if you are an employee, or if you are a manager and have one employee selected in the **Employee** filter.
  - To clear all the filters on the page, click **Clear All Filters**.

**Note:** All filters will only show the current statuses of employee goals. From the status dropdown menu, only those statuses will be visible.

Managers and employees can view a history of all the changes to an employee's goal marked 'In Progress' to stay aligned on the progress of the goal.

## To view goal change history as a manager:

1. From the Goals portlet, select the goal that you want to view the history of.
2. Click the **History** subtab on the goal window.

The History subtab shows which fields of the goal were changed, the content of the changes, and when the changes were made. Only employees can make these changes to their own goals.

Changes to a goal are only tracked after the manager approves the goal.

 **Note:** When you view a goal from an employee's performance review, only the changes up to the date the employee submitted the performance review will be displayed.

## To view goal change history as an employee:

1. From the home screen of your Employee Center role, go to Talent > Goals.
2. Select the goal you want to view the history of.
3. Click the **History** subtab on the goal window.

## Deleting Goals

As an employee, you can delete any of your goals if they have not been approved by their manager. Once a goal is deleted, it is gone forever.

### To delete a goal:

1. From the home screen of your Employee Center role, go to Talent > Goals.
2. Select the goal you want to delete.
3. From the **Actions** list, click **Delete**.
4. Click **Ok**.

## Closing Goals

After you finish working on a goal, you can close the goal and add a reflection that details the outcome of the goal.

You cannot edit a closed goal, but you and your manager can still add comments to it.

 **Note:** After you close a goal, the goal's actual value and progress are locked.

### To close a goal:

1. From the home screen of your Employee Center role, go to Talent > Goals.
2. Move the goal that you want to close from the **In Progress** column to the **Closed** column.
3. From the **Status** list, select a closed status:
  - **Completed** – The goal is complete.
  - **Not Completed** – The goal is not complete. For example, you may have a goal that is dependent on a project that is not completed on time.
  - **Canceled** – The goal is no longer required or relevant.

4. In the Reflection section, enter your thoughts about the outcome of the goal.
5. Click **Save**.

After you close a goal, an email notification is sent to your manager. Your manager can then enter a reflection about the outcome of the goal. You receive an email notification if your manager leaves a reflection on your goal.



**Note:** If you close a goal with an area of focus attached to it, you can no longer delete the area of focus.

After your goal is closed for three months, it no longer appears on your Goals page. You can view goals that are older than three months on the All Goals page. For more information, see [Viewing All Goals](#).

## Goal Tracking with Performance Metrics

Performance metrics access real-time data in NetSuite to automatically update the actual value of a goal. For example, if the goal is to win 10 new customers, the employee can use the New Customers metric. The New Customers metric uses data in NetSuite to find the number of customers who place their first order for whom the employee is the sales representative. NetSuite provides default performance metrics, and you can create your own.

A performance metric begins calculating the actual value of a goal when the employee moves the goal to in progress. The performance metric results are locked on the goal when it is closed (the status turns to completed, not completed, or canceled). When an employee closes a goal, transactions that occur within the goal period but after the closing date are not included in the goal.

Watch the following help video for more information about performance metrics:



[Real-Time Updates to Goals with Performance Metrics](#)

Learn more in the following topics:

- [Default Performance Metrics](#)
- [Creating Performance Metrics](#)
- [Editing, Inactivating, or Deleting a Performance Metric](#)

## Default Performance Metrics

Depending on the features that are enabled in your account, your employees can use the provided performance metrics to keep the actual value of their goals up-to-date.

Performance Metric	Description
Average Days to Close	The average number of days that it takes you to close a case.
Average Discount (%)	The average percent discount that you apply to sales orders.
<span style="color: #0070C0; font-weight: bold;">i</span> <b>Note:</b> This performance metric uses discounts that you apply to individual line items on a sales order, not to the overall sales transaction.	
Average Opportunity Duration (days)	The average number of days between creating an opportunity and closing it with the status Closed - Won.
Billable Hours	The number of your hours worked that can be billed to customers.

Performance Metric	Description
Cases Closed (#)	The number of cases that you close.
Kudos Received	The number of Kudos that you receive.
New Customers	The number of your customers who place their first order.
Opportunities Won	The number of opportunities that are closed with the status Closed – Won.
Projects Completed on Time (%)	The percentage of projects that you complete on time.
<p> <b>Note:</b> To use this performance metric, the projects that you are a part of should use both project tasks and baselines.</p>	
Quote Conversion Rate (%)	The percentage of your quotes that are converted to sales orders.
Revenue Target	The total monetary value of your closed won opportunities.
Win Rate	The percentage of your opportunities with the status Closed – Won

You can also create your own performance metrics. For more information, see [Creating Performance Metrics](#).

## Creating Performance Metrics

Creating a performance metric involves the following steps:

1. [Creating a Saved Search for a Performance Metric](#)
2. [Creating a Performance Metric](#)

 **Tip:** You may want to create performance metrics in a sandbox account first so that you can test that they work. Then you can create the performance metrics in your production account. For more information about sandbox accounts, see the help topic [NetSuite Sandbox](#).

### Creating a Saved Search for a Performance Metric

Before you create a performance metric, you need to create a saved search that has the correct criteria for tracking the progress of a specific goal. Saved searches that you use for performance metrics require the following:

- The saved search must be public. Making a saved search public means all users can run the search and see its results.
- The search results must include a summary type. For more information about summary types, see the help topic [Summary Types for Search Results](#).

To learn how to create a saved search, see the help topic [Defining a Saved Search](#).

The following example outlines how to define a saved search for tracking sales orders within a specific period. You change the saved search criteria depending on what you want to track.

### For example, to create a performance metric saved search to track sales orders:

1. Go to Reports > Saved Searches > All Saved Searches > New.
2. From the New Saved Search list page, select **Transactions**.
3. In the **Search Title** field, enter a unique name for the saved search.

4. To make the saved search public, check the **Public** box. Making a saved search public means all users can run the search and see its results.
5. Click the **Criteria** subtab, and then do the following:
  - a. In the **Standard** subtab, from the **Filters** list, select **Type**.
  - b. In the **Saved Transaction Search** window, select **Sales Order** from the list.
  - c. Click **Set**.
6. Click the **Results** subtab, and then do the following:
  - a. From the **Field** list, select **Amount (Transaction Total)**.
  - b. From the **Summary Type** column, select **Sum**.
  - c. Click **Add**.
7. Click **Save**.



**Note:** If you edit a saved search, the changes affect the associated performance metric and any open goals that use it.

## Creating a Performance Metric

After you create a saved search, you can create a performance metric.

### To create a performance metric:

1. Go to Setup > Performance Management > Performance Metrics > New.
2. In the **Name** field, enter a unique name for the metric. When naming the metric, name it so that an employee can determine the data and unit of measure that the metric tracks.
3. In the **Description** field, enter a description of the performance metric. When employees create a goal with this performance metric, they can view this description.
4. From the **Format** list, select if you want the performance metric to be tracked as a number, percent, or currency.
5. From the **Saved Search** list, select the saved search to associate with this metric.
6. From the **Employee Filter** list, select the type of employee you want to associate with this metric. For example, you can choose an employee type like Sales Rep as the filter for a revenue target performance metric. The performance metric will then use the revenue generated by the Sales Rep of a transaction record to populate the actual value of the goal.
7. From the **Date Filter** list, select the type of date you want to associate with this metric.
8. Click **Save**.

## Editing, Inactivating, or Deleting a Performance Metric

You can edit a performance metric at any time. Changes that you make to a performance metric directly affect any goals that are associated with it.

When you deactivate a performance metric, employees can no longer select the metric on new goals. If employees are already using the metric for existing goals, they can continue to use the metric.

You can delete a performance metric only if the metric is not associated with a goal.

### To edit, deactivate, or delete a performance metric:

1. Go to Setup > Performance Management > Performance Metrics.

2. Beside a metric, click **Edit**.
3. Do one of the following:
  - To edit the metric, make your changes, and then click **Save**.
  - To deactivate the metric, check the **Inactive** box, and then click **Save**.  
To view inactive performance metrics, check the **Show Inactives** box on the Performance Metrics list page.
  - To delete the metric, from the **Actions** list, select **Delete**. When prompted to confirm the deletion, click **OK**.

## Areas of Focus

Areas of focus enable employees and managers to collaborate on a list of focus areas to develop the employee's career.

If you are an employee, you can do the following:

- Create and manage your own areas of focus. For more information, see [Managing Your Areas of Focus](#).
- Connect your goals to areas of focus to ensure your goals are contributing to your career development. For more information, see the help topic [Creating Goals](#).

If you are a manager, you can provide guidance to your direct reports by creating areas of focus for them. For more information, see [Creating Areas of Focus for Your Direct Reports](#).

## Managing Your Areas of Focus

You use areas of focus to plan the areas of your career development you want to work on. You can create, edit, delete, and archive your areas of focus as needed. Areas of focus are available on your performance reviews or from the Goals page.



**Note:** You can sort the All Goals page by using the Area of Focus filter.

### Creating an Area of Focus

You can create an area of focus from your performance review or from your Goals page. For more information about creating an area of focus on your performance review, see the help topic [Completing Your Self Review](#).

#### To create an area of focus:

1. From the home page of your Employee Center role, go to Talent > Goals.
2. Click the **View My Areas of Focus** link.
3. Enter an area of focus, then click **Add**.

### Editing an Area of Focus

You can edit an area of focus after you or your manager creates it. For more information about editing an area of focus on your performance review, see the help topic [Completing Your Self Review](#).

#### To edit an area of focus:

1. From the home page of your Employee Center role, go to Talent > Goals.
2. Click the **View My Areas of Focus** link.
3. Beside the area of focus you want to edit, click the More icon  , then select **Edit**.
4. Make your edits, then click **Save**.

## Deleting an Area of Focus

You can delete an area of focus that is not included on a closed goal. If you delete an area of focus, it is also deleted from all planned and in progress goals that use it. For more information about deleting an area of focus on your performance review, see the help topic [Completing Your Self Review](#).

### To delete an area of focus:

1. From the home page of your Employee Center role, go to Talent > Goals.
2. Click the **View My Areas of Focus** link.
3. Beside the area of focus you want to delete, click the More icon  , then select **Delete**.
4. In the confirmation, click **Delete**.

## Archiving an Area of Focus

When you no longer need an area of focus, you can archive it. For more information about archiving an area of focus on your performance review, see the help topic [Completing Your Self Review](#).

### To archive an area of focus:

1. From the home page of your Employee Center role, go to Talent > Goals.
2. Click the **View My Areas of Focus** link.
3. Beside the area of focus you want to archive, click the More icon  , then select **Archive**.
4. In the confirmation, click **Archive**.



**Warning:** Once the area of focus is archived, it cannot be edited or moved back to the list of current areas of focus.

## Creating Areas of Focus for Your Direct Reports

If you are a manager, you can provide guidance to your direct reports by creating areas of focus for them. After you create an area of focus for a direct report, your direct report can edit, delete, or archive their own areas of focus as needed. You can create areas of focus for your direct reports on performance reviews or on the Goals page. For more information about creating an area of focus for a direct report on their performance review, see the help topic [Completing Performance Reviews as the Reviewer](#).

## Creating Areas of Focus for Your Direct Reports

You can create an area of focus for a direct report in the Employee Center from the Goals page.

### To create an area of focus for a direct report:

1. From the home screen of your Employee Center role, go to Talent > Goals.
2. From the **My Team** list, select a direct report.

3. Click the **View Areas of Focus for "Employee's Name"** link. For example, if you select John Smith from your My Team list, you will click the following link: **View Areas of Focus for John Smith**.
4. Click the **Current** subtab.
5. Enter an area of focus for the employee, then click **Add**.

## Manager Digest

The Manager Digest is a monthly email sent to managers to update you on your team's Kudos, goal progress, Areas of Focus, and performance reviews.

The Manager Digest is sent out on the first Monday of every month. The Manager Digest period starts on the day the last Manager Digest was sent and ends on the day before the current Manager Digest is sent.

The following examples show how the Manager Digest period works:

- If the first Manager Digest has a period from Tuesday, June 1 to Thursday, June 30, the Manager Digest will send on Friday, July 1.
- If the second Manager Digest has a period from Friday, July 1 to Sunday, August 1, the Manager Digest will send on Monday, August 2.

The Manager Digest displays information for the following:

- Your team's achievements. You can view who received Kudos and who has goals ahead of schedule.
- Updates on your team's goals. You can view how many of your team's goals are in progress, completed, not completed, and canceled. You can also view who has left comments on your team's goals, and how many goals are behind schedule.
- How to support your team and their goals. You can support your team and their goals by viewing which of your team's goals were updated and not updated. You can also support your team and their goals by viewing which of your team's goals were connected with Areas of Focus.
- Any ongoing performance reviews for your team.
- Any new performance metrics that have been created to measure progress on your team's goals.

The Manager digest will only display information for each section if there has been activity in that section. For example, if no new performance metrics were created in the last month, the Manager Digest will not display any information for performance metrics.

The Manager Digest only includes employees who are active and employees who are not terminated.

 **Note:** You will receive the Manager Digest if your team has at least one goal in progress, or you have to complete your team's performance reviews.

For more information, see the help topics [Goal Management for Employees and Managers](#) and [Areas of Focus](#).

## Performance Reviews

With the Performance Management feature, you can create and schedule performance reviews based on templates for employees. Performance review templates are made up of questions and an overall rating. Performance reviews also display goals that were worked on during the review period.

Performance reviews display any goals that were worked on and Kudos that were received during the review period. Employees and managers can manage the employee's area of focus directly from the performance review to help plan for future development.

Learn more in the following topics:

- [Performance Review Setup](#) — You can define performance review questions and rating scales, create performance review templates, and create performance reviews. These can be for groups of employees or for individual employees.
- [Performance Review Process](#) — Employees complete self reviews, managers complete employee reviews, Human Resources approves reviews, and then employees finalize their reviews. Employees and managers are notified by email when action is required for a review.
- [Performance Review Saved Searches](#) — Default saved searches provide you with information about performance reviews in your organization.
- [Performance Management Workbook](#) — You can use performance management datasets and workbooks to analyze goal and performance review information for employees.

## Performance Review Setup

When you set up performance reviews, consider the data that employees and managers should reflect on to evaluate performance for the specific review period.

To set up performance reviews, complete the following tasks:

- [Performance Review Questions](#) — Create a library of performance review questions that you can add to performance review templates.
- [Performance Review Rating Scales](#) — Create rating scales that you can apply to performance review templates. Rating scales are used for questions that require a rating and for the overall rating.
- [Performance Review Templates](#) — Create templates for different performance review scenarios. Templates are made up of performance review questions and a rating scale.

After you complete the setup tasks, you can launch performance reviews for groups of employees and individual employees:

- [Scheduling Performance Reviews](#) — Launch a performance review for a group of employees by using the Basic performance review schedule or the Advanced performance review schedule.
- [Individual Performance Reviews](#) — Launch a performance review for an individual employee.

## Performance Review Questions

You can create performance review questions to add to performance review templates. Each question is answered by both the employee and the reviewer on performance reviews.

For more information, check out the following:

- [Creating a Performance Review Question](#)
- [Editing, Inactivating, or Deleting a Performance Review Question](#)

### Creating a Performance Review Question

You can maintain a set of performance review questions in your question library. After you create questions, you can add them to performance review templates.

#### To create a performance review question:

1. Go to Setup > Performance Management > Question Library > New.
2. From the **Type** list, do one of the following:

- To create a question that requires a text only response, select **Text Only**.
  - To create a question that requires a text response and a rating selection, select **Text with Rating**. For details about rating scales, see [Performance Review Rating Scales](#).
3. In the **Text** field, enter your question.
  4. To finish, click **Save**.



**Tip:** You can also create questions directly from a performance review template. For details, see [Performance Review Templates](#).

## Editing, Inactivating, or Deleting a Performance Review Question

You can edit a question only if it is not used in a performance review. You can delete a question only if it is not used in a template.

When you deactivate a question, it no longer appears in lists. An inactive question still appears on performance reviews that were launched before you deactivated the question.

### To edit, deactivate, or delete a performance review question:

1. Go to Setup > Performance Management > Question Library.
2. Beside a question, click **Edit**.
3. Do one of the following:
  - To edit the question, make your changes, and then click **Save**.
  - To deactivate the question, check the **Inactive** box, and then click **Save**.  
To view a list of inactive questions, go to Setup > Performance Management > Question Library and check the **Show Inactives** box.
  - To delete the question, from the **Actions** list, select **Delete**. When prompted to confirm the deletion, click **OK**.

## Performance Review Rating Scales

You can create a rating scale to include on a performance review template. Rating scales apply to questions that require both a text response and a rating selection and to the overall rating on a performance review. For example, your rating scale might include the options Excellent, Good, Satisfactory, and Needs Improvement.

For more information, check out the following:

- [Creating a Performance Review Rating Scale](#)
- [Editing a Performance Review Rating Scale](#)

### Creating a Performance Review Rating Scale

Each performance review template can only contain one rating scale.

### To create a performance review rating scale:

1. Go to Setup > Performance Management > Performance Reviews > Rating Scales > New.
2. In the **Name** field, enter a unique name for the rating scale.
3. In the **Description** field, enter a description for the rating scale.

4. In the table, add rating items:
  - a. In the **Name** column, enter a name for the rating item. For example, the name could be Exceeds Expectations.
  - b. In the **Description** field, enter a meaningful description for the rating item. For example, the description could be "Performance and results were consistently above and beyond expectations." Descriptions can be viewed on performance reviews.
  - c. In the **Value** field, enter a numeric value for the rating item. The value determines the order in which rating items appear in the Rating list on a review. The rating item with the highest value appears at the top of the list. The rating item with the lowest value appears at the bottom of the list.
  - d. Click **Add**.
  - e. Repeat steps a to d for each rating item that you want to add to the rating scale. Rating scales must include at least two rating items.



**Note:** You cannot change rating items after the rating scale is included on a performance review template that you use on a performance review.

5. Click **Save**.

### Editing a Performance Review Rating Scale

You can edit a rating scale if it is not used in a performance review. You can delete a rating scale if it is not used in a template.

When you deactivate a performance review rating scale, it no longer appears in lists. An inactive rating scale still appears on performance reviews that were launched before you deactivated the rating scale.

#### To edit a performance review rating scale:

1. Go to Setup > Performance Management > Performance Reviews > Rating Scales.
2. Beside a rating scale, click **Edit**.
3. Do one of the following:
  - To edit the performance review rating scale, make your changes, and then click **Save**.
  - To deactivate a performance review rating scale, check the **Inactive** box, and then click **Save**.  
To view a list of inactive rating scales, go to Setup > Performance Management > Performance Reviews > Rating Scales and check the **Show Inactives** box.
  - To delete a performance review rating scale, from the **Actions** list, select **Delete**. When prompted to confirm the deletion, click **OK**.

## Performance Review Templates

After you create performance review questions and rating scales, you need to create performance review templates. With templates, you can set up different performance reviews for different sets of people in your organization or for different periods of time. For example, you might set up a quarterly performance review template and an annual performance review template.

For more information, check out the following:

- [Creating a Performance Review Template](#)
- [Editing a Performance Review Template](#)
- [Inactivating or Deleting a Performance Review Template](#)

## Creating a Performance Review Template

A performance review template is made up of performance review questions and a performance review rating scale. For more information, see [Performance Review Questions](#) and [Performance Review Rating Scales](#).

### To create a performance review template:

1. Go to Setup > Performance Management > Templates > New.
2. In the **Name** field, enter a unique name for the performance review template.
3. To add instructions to the performance review, in the **Instructions** field, enter instructions.
4. From the **Performance Review Rating Scale** list, select the rating scale to use for performance review questions and for the overall rating.
5. If you want to customize instructions for the performance review, in the **Customize Instructions** field, enter instructions for the performance review.



**Note:** If you do not customize the instructions, a default set of instructions will appear.

6. If you want to customize the acknowledgment message for the performance review, in the **Customize Acknowledgment** field, enter an employee acknowledgment message. This message should include specific information required by your company. Employees must read this acknowledgment message before completing their reviews.



**Note:** If you do not customize the acknowledgment message, a default acknowledgment message will appear.

7. From the **Performance Review Question** subtab, click a line in the list, and then do one of the following:
  - To add an existing question, select a question from the list.
  - To create a question, from the list, select **New**. For more information, see the help topic [Creating a Performance Review Question](#).
8. Click **Add**.
9. Repeat steps 5 to 6 for each question that you want to add to the performance review template.
10. To finish, click **Save**.

## Editing a Performance Review Template

If you edit a template, the changes are not updated on existing performance reviews that use the template.

### To edit a performance review template:

1. Go to Setup > Performance Management > Templates.
2. Beside a performance review template, click **Edit**.
3. When you finish editing, click **Save**.

## Inactivating or Deleting a Performance Review Template

When you deactivate a performance review template, it no longer appears in lists. An inactive template still appears on performance reviews that were launched before you deactivated the template.

You can delete a template only if it is not used by a performance review.

### To inactivate or delete a performance review template:

1. Go to Setup > Performance Management > Templates.
2. Beside the performance review template, click **Edit**.
3. Do one of the following:
  - To inactivate the template, check the **Inactive** box. Click **Save**.  
To view a list of inactive templates, go to Setup > Performance Management > Templates and check the **Show Inactives** box.
  - To delete the template, from the **Actions** list, select **Delete**.

## Scheduling Performance Reviews

You can schedule a performance review and assign it to a group of employees. On the launch date that you specify, employees and reviewers receive email notifications to complete their reviews. There are three different performance review schedules you can use: the Basic schedule, the Advanced Fixed Date schedule, and the Advanced Relative Date schedule.

To create a performance review for a single employee, see [Individual Performance Reviews](#).

To create a performance review with the Advanced Fixed Date schedule, see [Scheduling Performance Reviews with the Fixed Date Schedule](#).

To create a performance review with the Advanced Relative Date schedule, see [Scheduling Performance Reviews with the Relative Date Schedule](#).

### Scheduling Performance Reviews with the Basic Schedule

You can schedule a performance review using the Basic or Advanced version of the performance review schedule. With the Basic schedule, you can schedule a performance review based on subsidiary, location, department, or job title. For example, you might want to schedule a review for all employees in your sales department. You can schedule performance reviews based on calendar dates for the performance review's launch date and the employee's due date. You can also choose calendar dates for the reviewer's due date, the start of the review period, and the end of the review period.

An employee's supervisor is assigned as their reviewer for scheduled performance reviews. If an employee does not have a supervisor on their employee record, you can assign a reviewer by editing the individual performance review. For more information, see [Assigning a Supervisor to an Employee](#) and [Editing a Performance Review](#).



**Note:** To schedule performance reviews with the Basic schedule, you need to have a role with the Talent Administrator permission access level at Create or higher.

### To schedule a performance review with the Basic schedule:

1. Go to Setup > Performance Management > Scheduler > New.
2. In the **Name** field, enter a name for the performance review schedule. This name should be meaningful to employees and reviewers that will complete the performance review.
3. From the **Performance Review Template** list, select the template to use for this performance review schedule.
4. In the **Launch Date** field, enter the date on which NetSuite sends reviews to employees. This date must be a future date. You can also click the calendar icon to choose a date from the calendar.

5. In the **Employee Due Date** field, enter the date by which employees should complete their self reviews.
6. In the **Review Due Date** field, enter the date by which reviewers should complete the performance reviews.
7. In the **Review Period Start** field, enter the start date for the performance review period.
8. In the **Review Period End** field, enter the end date for the performance review period.



**Note:** After the performance review launch date, the start date and end date cannot be changed.

9. To specify the employees who should be included in the performance review, complete one or more of the following options:
  - To include employees based on their subsidiary, from the **Subsidiary** list, select a subsidiary. To include employees from multiple subsidiaries, press and hold Ctrl while you select additional subsidiaries.
  - To include employees based on their location, from the **Location** field, select a location. To include employees from multiple locations, press and hold Ctrl while you select additional locations.
  - To include employees based on their department, select the department from the **Department** list. To include employees from multiple departments, press and hold Ctrl while you select additional departments.
  - To include employees based on their job title, in the **Job** field, enter a job title. To enter multiple job titles, on a new line, start typing another job title.
10. Click **Save**.

When you launch the performance review schedule, you can access performance reviews by going to Setup > Performance Management > Performance Reviews.

### Scheduling Performance Reviews with the Fixed Date Schedule

With the Advanced schedule, you can schedule performance reviews for a group of employees simultaneously. The Advanced schedule has two options: scheduling reviews by Fixed Date, and scheduling reviews by Relative Date.

The Fixed Date schedule lets you schedule performance reviews with calendar dates and a dataset that defines all employees you want to give reviews to. The Fixed Date schedule also lets you choose calendar dates for the performance review's launch date and the employee's due date. It also lets you choose calendar dates for the reviewer's due date, the start of the review period, and the end of the review period.

To schedule performance reviews with the Fixed Date schedule, you need to have the following:

- A role with the Talent Administrator permission access level at Create or higher.
- A role with the SuiteAnalytics permission to create an employee dataset.
- The SuiteAnalytics feature enabled.

### To schedule a performance review with the Fixed Date Schedule

1. Setup > Performance Management > Scheduler > New.
2. In the **Name** field, enter a name for the performance review schedule. This name should be meaningful to employees and reviewers that will complete the performance review.

3. In the **Performance Review Template** list, select the template to use for this performance review schedule.
4. Under **Schedule Type**, select **Advanced Schedule**. The **Fixed Date** option is selected by default under **Launch Date Type**.
5. In the **Launch Date** field, enter the date on which NetSuite sends reviews to employees. This date must be a future date. You can also click the calendar icon  to choose a date from the calendar.
6. In the **Employee Due Date** field, enter the date by which employees should complete their self reviews. The employee due date must be before the review due date.
7. In the **Review Due Date** field, enter the date by which reviewers should complete the performance reviews.
8. In the **Review Period Start** field, enter the start date for the performance review period.
9. In the **Review Period End** field, enter the end date for the performance review period.
10. In the **Dataset** field, select the dataset that defines all the employees you want to schedule reviews for.



**Tip:** Ensure the dataset includes your desired restrictions before you attach it to a performance review schedule. Datasets run regardless of your role restrictions. The performance review schedule also automatically excludes any employees who are not active and employees who have been terminated.

11. Click **Save**.

Watch the following help video for information about scheduling a performance review with the Fixed Date Schedule:



[Using the Advanced – Fixed Date and Advanced – Relative Date Performance Review Schedules](#)

For more information on datasets, see [Performance Management Dataset Templates](#).

### Scheduling Performance Reviews with the Relative Date Schedule

With the Advanced schedule, you can schedule performance reviews for a group of employees simultaneously. The Advanced schedule has two options: scheduling reviews by Fixed Date, and scheduling reviews by Relative Date. The Relative Date schedule lets you choose review due dates and a review period that are in relation to the date the review is launched.

You can schedule reviews based on an employee group dataset that defines all the employees you want to give reviews to. Instead of choosing calendar dates, you can enter an offset number of days relative to the day the review is launched. You can enter a number of days for the following fields:

- **Employee Due Date After Launch (Days)**
- **Review Due Date After Launch (Days)**
- **Review Period Start Before Launch (Days)**
- **Review Period end Before Launch (Days)**

To schedule performance reviews with the Relative Date schedule, you need to have the following:

- A role with the Talent Administrator permission access level at Create or higher.
- A role with the SuiteAnalytics permission to create an employee dataset.
- The SuiteAnalytics feature enabled.

### To schedule a performance review with the Relative Date schedule:

1. Go to Setup > Performance Management > Scheduler > New.
2. In the **Name** field, enter a name for the performance review schedule. This name should be meaningful to employees and reviewers that will complete the performance review.
3. In the **Performance Review Template** list, select the template to use for this performance review schedule.
4. Under **Schedule Type**, select **Advanced Schedule**.
5. Under **Launch Date Type**, select **Relative Date**.
6. In the **Employee Due Date After Launch (Days)** field, enter the number of days after the performance review has launched to be the employee's due date.
7. In the **Review Due Date After Launch (Days)** field, enter the number of days after the performance review has launched to be the reviewer's due date.
8. In the **Review Period Start Before Launch (Days)** field, enter the number of days before the performance review launches to be the start of the review period.
9. In the **Review Period End Before Launch (Days)** field, enter the number of days before the performance review launches to be the end of the review period.
10. In the **Dataset** field, select the dataset that includes all the employees you want to schedule reviews for.



**Tip:** Ensure the dataset includes your desired restrictions before you attach it to a performance review schedule. Datasets run regardless of your role restrictions. The performance review schedule also automatically excludes any employees who are not active and employees who have been terminated.

11. Click **Save**.

For example, you can create a performance review schedule to send out probationary performance reviews on the ninetieth day after an employee's start date. If your performance review launches on August 25, your field values can be:

- **Review Period Start Before Launch (Days):** 90
- **Review Period End Before Launch (Days):** 1
- **Employee Due Date After Launch (Days):** 14
- **Review Due Date After Launch (Days):** 28

When the performance review scheduler runs on August 25, a performance review will be created with the following dates:

- **Review Period Start Before Launch (Days):** May 27
- **Review Period End Before Launch (Days):** August 24
- **Launch Date:** August 25
- **Employee Due Date After Launch (Days):** September 8
- **Review Due Date After Launch (Days):** September 22

Watch the following help video for more information on scheduling performance reviews with the Relative Date Schedule:

- [Using the Advanced – Fixed Date and Advanced – Relative Date Performance Review Schedules](#)

Watch the following help video for more information on using dataset templates with the Relative Date Schedule:

- [Using Dataset Templates with the Advanced Scheduler](#)

## Editing, Inactivating, or Deleting a Performance Review Schedule

You can edit, deactivate, and delete performance review schedules. Edits are not applied to performance reviews that were launched before you made the change. If you delete a schedule, performance reviews that were launched through the scheduler are not deleted.

When you deactivate a performance review schedule, it no longer appears in lists. Performance reviews that were launched through the scheduler before you deactivated the schedule are still active.

### To edit a performance review schedule:

1. Go to Setup > Performance Management > Scheduler.
2. Beside the performance review schedule name, click **Edit**.
3. Make your changes, and then click **Save**.

### To deactivate a performance review schedule:

1. Go to Setup > Performance Management > Scheduler.
2. Beside the performance review schedule name, click **Edit**.
3. Beside the performance review template, check the **Inactive** box. Click **Save**.



**Note:** To view a list of inactive schedules, go to Setup > Performance Management > Scheduler and check the **Show Inactives** box.

### To delete a performance review schedule:

1. Go to Setup > Performance Management > Scheduler.
2. Beside the performance review schedule name, click **Edit**.
3. Above the performance review schedule name, click **Delete**.
4. Click **OK**.

## Performance Management Dataset Templates



**Note:** Before you schedule performance reviews with the Advanced performance review schedule, ensure you have the SuiteAnalytics Workbook feature enabled. To learn how to enable the SuiteAnalytics Workbook feature, see the help topic [Enabling SuiteAnalytics Workbook in Your NetSuite Account](#).

When you schedule reviews with the Advanced schedule, you need to attach datasets to them which define the employees you want to give reviews to. NetSuite provides two dataset templates for you to use when you schedule performance reviews with the Advanced scheduler. They are **Performance Management - Reviews Scheduler** and **Reviews Scheduler by Relative Date Schedule**. These dataset templates are meant to serve as guides for how to set up your datasets when using the Advanced performance review schedule. You can use the dataset templates as they are or customize them.

When SuiteAnalytics is turned off, performance reviews with the Schedule Type marked as "Advanced" will automatically switch to the Schedule Type "Basic". The datasets attached to the schedules will be removed and the performance schedules will be marked as inactive. The following screenshot shows these changes recorded in the **System Notes** tab of the performance review schedule.

For more information about how to edit a dataset, see the help topic [Editing a Dataset](#).

## Performance Management – Reviews Scheduler Dataset Template

This dataset template includes all active employees and employees that have not been terminated enabling you to create performance reviews for all your active employees at once.

### Dataset Configuration

The Performance Management – Reviews Scheduler dataset includes fields from the employee record type that provide relevant information about your employees for creating their performance reviews. This dataset contains the following record fields, formulas, and criteria:

Root Record Type	Data Grid	Custom Formula Fields	Criteria Filters
Employee	<p>The following fields are included in the dataset:</p> <ul style="list-style-type: none"> <li>■ Entity ID</li> <li>■ Email</li> <li>■ Supervisor</li> <li>■ Job Title</li> <li>■ Department</li> <li>■ Location</li> <li>■ Subsidiary</li> </ul>	<p>The following custom formula fields are included in the dataset:</p> <ul style="list-style-type: none"> <li>■ Supervisor is Active &amp; Non-Terminated</li> <li>■ Employee is not Terminated</li> </ul>	<p>The following criteria is used to filter the dataset:</p> <ul style="list-style-type: none"> <li>■ Is Inactive is false</li> <li>■ Employee is not Terminated is true</li> </ul>

To edit a dataset, see the help topic [Editing a Dataset](#).

## Reviews Scheduler by Relative Date Dataset Template

This dataset template can be used for scheduling performance reviews by dates that are relevant and meaningful to you.

### Dataset Configuration

The Reviews Scheduler by Relative Date dataset includes fields from the employee record type that provide relevant information about your employees for creating their performance reviews. The dataset contains the following record fields, multiple custom formulas, and criteria:

Root Record Type	Data Grid	Custom Formula Fields	Criteria Filters
Employee	<p>The following fields are included in the dataset:</p> <ul style="list-style-type: none"> <li>■ Entity ID</li> <li>■ Hire Date</li> <li>■ Email</li> <li>■ Supervisor</li> <li>■ Job Title</li> <li>■ Department</li> <li>■ Location</li> <li>■ Subsidiary</li> </ul>	<p>The following custom formula fields are included in the dataset:</p> <ul style="list-style-type: none"> <li>■ Supervisor is Active &amp; Non-Terminated</li> <li>■ Employee is not Terminated</li> <li>■ Today is 30 Days After Hire Date</li> <li>■ Work Anniversary + 30 Days is Today</li> <li>■ Work Anniversary is Today</li> </ul>	<p>The following criteria is used to filter the dataset:</p> <ul style="list-style-type: none"> <li>■ Is Inactive is false</li> <li>■ Employee is not Terminated is true</li> <li>■ Work Anniversary is Today is True</li> </ul>

To edit a dataset, see the help topic [Editing a Dataset](#).

## Formula Configuration for Dataset Templates

The dataset templates include formulas that are crucial for your performance reviews. You can copy these formulas into your datasets because they include all supervisors and employees who are active and not terminated. The formulas are as follows:

### **Supervisor is Active and Non-Terminated**

```
CASE WHEN ( ${supervisor.isinactive}='F' AND (${supervisor.releasedate} IS null OR
${supervisor.releasedate}>CURRENT_DATE) ) THEN 'T'
ELSE 'F'
END
```

### **Employee is not Terminated**

```
CASE WHEN ({releasedate} IS null OR {releasedate} > CURRENT_DATE) THEN 'T'
ELSE 'F'
END
```

The following formulas provide flexibility for how you want to schedule performance reviews with the Relative Date performance review schedule. You can use any of these formulas:

### **Work Anniversary + 30 Days is Today**

This formula can be used in datasets when you want to schedule performance reviews for employees on the thirtieth day after their annual work anniversaries. It is useful if you want to create annual performance reviews for your employees with an additional amount of time. The formula is:

```
CASE WHEN CONCAT(CONCAT(TO_CHAR(EXTRACT(DAY FROM {hiredate}+30)),'/'),
TO_CHAR(EXTRACT(MONTH FROM {hiredate}+30))) = CONCAT(CONCAT(TO_CHAR(EXTRACT(DAY FROM
CURRENT_DATE)),'/'), TO_CHAR(EXTRACT(MONTH FROM CURRENT_DATE))) THEN 'T'
ELSE 'F'
END
```

### **Today is 30 Days After Hire Date**

This formula can be used in datasets when you want to schedule performance reviews for employees who were hired thirty days ago. This formula is useful if you want to create performance reviews for employees during their probationary periods. The formula is:

```
CASE WHEN TRUNC({hiredate} + 30) = TRUNC(CURRENT_DATE) THEN 'T'
ELSE 'F'
END
```

### **Work Anniversary is Today**

This formula can be used in datasets when you want to schedule performance reviews for employees on their work anniversaries. This formula is useful if you want to create annual performance reviews for your employees. The formula is:

```
CASE WHEN CONCAT(CONCAT(TO_CHAR(EXTRACT(DAY FROM {hiredate})),'/'), TO_CHAR(EXTRACT(MONTH
FROM {hiredate}))) = CONCAT(CONCAT(TO_CHAR(EXTRACT(DAY FROM CURRENT_DATE)),'/'),
TO_CHAR(EXTRACT(MONTH FROM CURRENT_DATE))) THEN 'T'
```

ELSE 'F'

END



**Note:** Some filters or formulas dependent on a feature that is turned off will still apply when datasets run.

For more information about how to use formula fields, see the help topic [Creating Formula Fields in SuiteAnalytics Workbook](#).

To edit a dataset, see the help topic [Editing a Dataset](#).

## Individual Performance Reviews

You may need to create a performance review for an individual employee rather than a group of employees. Like scheduled performance reviews, individual performance reviews use a performance review template. Unlike scheduled performance reviews, individual performance reviews launch right after you save them. Learn more in the following topics:

- [Creating a Performance Review for an Individual Employee](#)
- [Editing a Performance Review](#)
- [Deleting a Performance Review](#)

To learn how to schedule a performance review for a group of employees, see [Scheduling Performance Reviews](#).

### Creating a Performance Review for an Individual Employee

You can create a performance review for an individual employee. If required, you can assign a reviewer other than the employee's supervisor.

#### To create a performance review:

1. Go to Setup > Performance Management > Performance Reviews > New.
2. In the **Name** field, enter a meaningful name for the performance review.
3. From the **Employee** list, select an employee. After you save the performance review, you cannot change this field.
4. From the **Performance Review Template** list, select the template to use for this performance review. The questions, rating scale, and instructions on the template are included on the review. After you save the performance review, you cannot change this field.
5. From the **Reviewer** list, select a reviewer for the performance review. After you save the performance review, you cannot change this field.
6. In the **Review Period Start** and the **Review Period End** fields, enter the start and end dates for the review period. After you save the performance review, you cannot change these dates.
7. In the **Employee Due Date** field, enter the date by which the employee should complete their self review.
8. In the **Review Due Date** field, enter the date by which the reviewer should complete the performance review.
9. Click **Save**.

The performance review launches after you save it, and the employee and the reviewer receive an email notification. For details, see [Performance Review Process](#).

## Editing a Performance Review

After a performance review launches, you can make changes to the following fields:

- Review Status — You can make the following changes:
  - You can change all statuses to **Canceled**. For more information, see [Canceling Performance Reviews](#).
  - You can change a **Self Review Submitted** status to **Self Review Draft**.
  - You can change a **Review Submitted** status to **Reviewer Draft** or **HR Approved | Sign Off Required**. For more information on approving a review, see [Approving an Individual Performance Review](#).
- Reviewer — You can only edit the reviewer if you schedule a performance review and the employee does not have a supervisor assigned to them on their employee record. For more information, see [Scheduling Performance Reviews with the Basic Schedule](#).
- Employee Due Date
- Review Due Date

You cannot change the employee, start or end date of the review period, or performance review template.

### To edit a performance review:

1. Go to Setup > Performance Management > Performance Reviews.
2. Beside the performance review, click **Edit**.
3. After you finish editing, click **Save**.

## Deleting a Performance Review

You can delete a performance review only when its status is Launched or Canceled. After employees save or submit their responses, you can no longer delete the performance review. Instead, you can cancel the review. For more information about canceling a review, see [Canceling Performance Reviews](#).

### To delete a performance review:

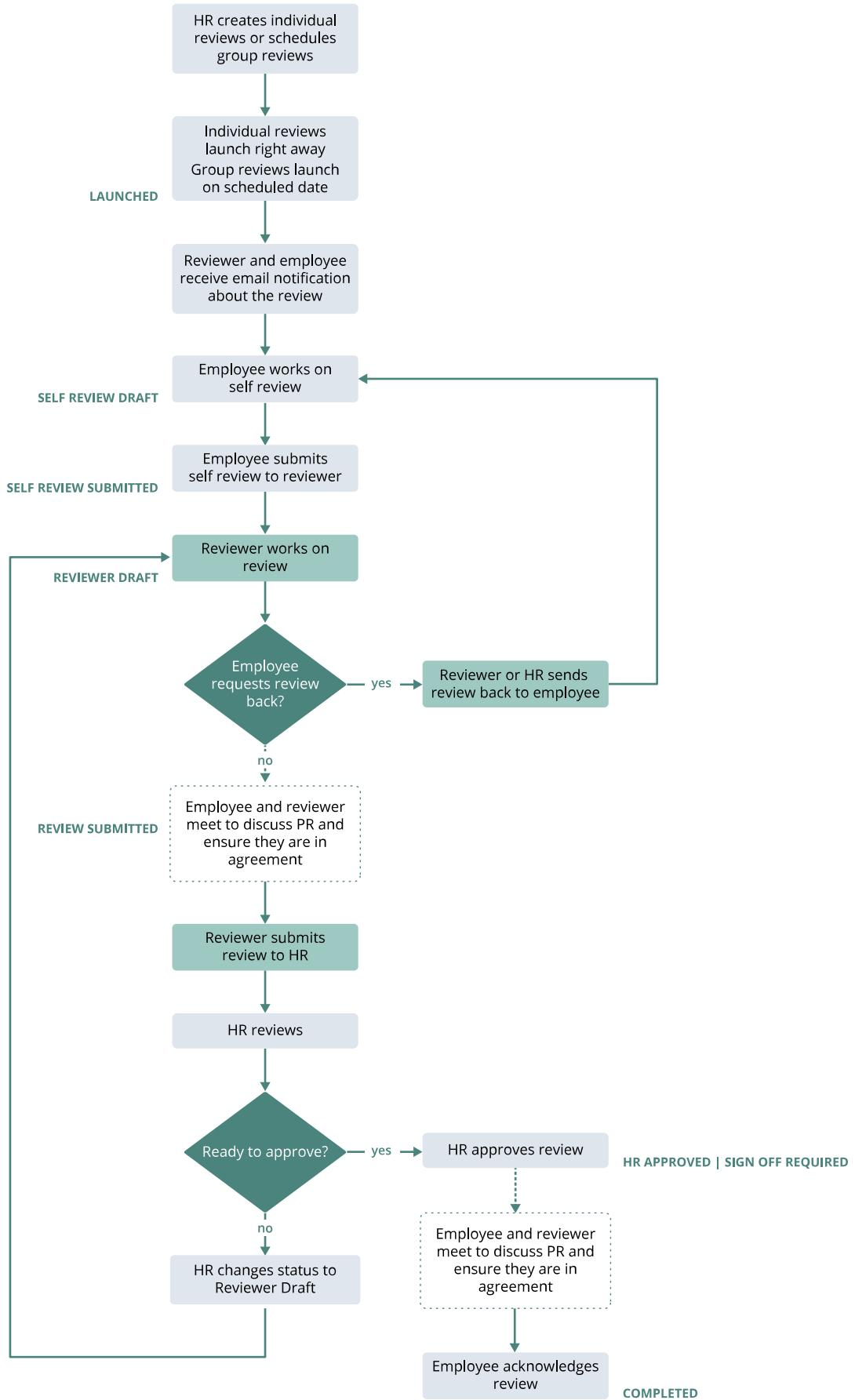
1. Go to Setup > Performance Management > Performance Reviews.
2. Next to the performance review, click **Edit**.
3. From the **Actions** list, select **Delete**.
4. When prompted to confirm the deletion, click **OK**.

## Performance Review Process

After you launch performance reviews, employees complete self reviews by answering performance review questions and rating their overall performance. Next, reviewers, who are typically managers, review employees' responses, add in-line responses, and submit reviews to Human Resources. At this point, you approve the review. After you approve reviews, employees can read their reviewer's responses, and can acknowledge their reviews.

Reviewers and employees should discuss reviews at some point in the process, although this step is not required.

The following diagram shows the performance review process.



## Completing Your Self Review

A performance review is an opportunity for you to reflect on your performance during a review period and to consider future career goals. When it is time for you to complete a self review, you receive an email notification with the due date for your self review. You can click the link in the notification to start working on your self review.

To help you reflect on your performance, your performance review includes the following:

- Goals that you worked on or completed during the review period
- Kudos you received during the review period
- Areas of focus you created to reflect on and plan your career development

The context panel on the right side of your performance review shows all goals you've worked on and all Kudos you've received during your review period.

### To complete your self review:

1. From the home screen of your Employee Center role, go to Talent > Performance Reviews.
2. Beside your performance review, click **Edit**.
3. In the Reflection section, enter responses to the questions.
4. In the Overall Rating section, select a rating for your overall performance during the period, and enter comments to support that rating.
5. Either save or submit your review:
  - To save a draft version of your responses, click **Save**.
  - To submit your responses to your reviewer, click **Submit**.

After you submit the performance review, you cannot make any other changes to it unless the performance review is sent back by your manager or HR Manager.

A copy of the goals that you worked on or completed during the review period and the Kudos you received during the review period are saved on your performance review.

## Completing Performance Reviews as the Reviewer

If you are a reviewer for employee performance reviews, you can start completing performance reviews after employees submit their self reviews. You can read employees' self review responses and provide your own reflection on their performance for the review period. This includes answering review questions and rating employees' overall performance.

When performance reviews launch, you receive an email notification. The notification includes the self review due date and the due date for your review. After employees submit their self reviews, you receive another notification.

To help you reflect on the employee's performance, the performance review includes the following:

- Goals that the employee worked on or completed during the review period
- Kudos from other coworkers during the review period
- Areas of focus you created to reflect on and plan your career development

The context panel on the right side of the employee's performance review shows all goals the employee worked on and all Kudos the employee received during the review period.

## To complete a performance review as the reviewer:

1. From the home screen of your Employee Center role, go to Talent > Performance Reviews.
2. Next to the employee's performance review, click **Edit**.
3. In the Reflection section, enter responses to the questions.
4. In the Overall Rating section, select a rating for the employee's overall performance during the period, and enter comments to support that rating.
5. Either save or submit the review:
  - To save a draft of the review, click **Save**.
  - To submit the performance review for Human Resources approval, click **Submit**.

 **Note:** In the Areas of Focus section, you can view the employee's current and archived areas of focus. For more information on how to manage an employee's area of focus as a manager, see the help topic [Creating Areas of Focus for Your Direct Reports](#).

After you submit the performance review, you cannot make any other changes to it.

## Sending Performance Reviews Back to Employees

Your employees may let you know that they need to make changes to their self reviews. If you have not yet submitted the reviews for Human Resource approval, you can send the reviews back to employees. When you return reviews to employees, your draft responses are saved, but employees cannot see your responses. Employees can make edits to their self reviews, and then they can submit their reviews to you again.



**Tip:** If a performance review is returned to you, you will receive an email notification for it.

## To send a performance review back to an employee:

1. From the home screen of your Employee Center role, go to Talent > Performance Reviews.
2. Beside a performance review, click **Edit**.
3. Click **Save and Return to Employee**.
4. In the confirmation message, click **Save and Return to Employee**.

## Approving Performance Reviews

Once a performance review is completed by both the employee and reviewer, Human Resources can approve the review. After you approve performance reviews, employees are notified by email to read reviewers' responses and finalize their reviews. You can approve performance reviews one at a time, or you may be able to approve multiple performance reviews at the same time.

### Approving an Individual Performance Review

After a reviewer submits a performance review, Human Resources needs to approve the review.

## To approve a performance review:

1. Go to Setup > Performance Management > Performance Reviews.

2. Next to the employee's performance review, click **Edit**.
3. From the **Status** list, select **HR Approved | Sign Off Required**.



**Note:** If the performance review is not ready for HR approval, from the **Status** list, you can select **Reviewer Draft**. This sends the review back to the reviewer.

4. To finish, click **Save**.

## Approving Multiple Performance Reviews

You can use a mass update to approve multiple performance reviews at the same time. To use a mass update, your role needs the Mass Updates permission. For more information about mass updates, see the help topic [Mass Changes or Updates](#).

### To approve multiple performance reviews:

1. Go to Lists > Mass Update > Mass Updates.
2. From the Mass Update list, select **Performance Management**.
3. Click **Approve Submitted Reviews**.
4. Define the mass update. For more information, see the help topic [Defining a Mass Update](#).

You can also mass approve submitted reviews from an employee's performance review that has either been launched or submitted for review. You can click the **Mass Approve Submitted Reviews** link in the top right of the employee's performance review.

## Finalizing Your Performance Review

After your reviewer submits your performance review and Human Resources approves it, you can add final comments and acknowledge your review. After you acknowledge your review, you cannot make any edits to your final comments.

### To finalize your performance review:

1. From the home page of your Employee Center, go to Talent > Performance Reviews.
  2. Beside your performance review, click **Edit**.
  3. Read your reviewer's responses.
- 
- Tip:** Take some time to discuss your performance review with your reviewer before you finalize it.
4. Click **Complete My Review**.
  5. If you want, enter any final comments in the field. After you acknowledge your review, you cannot change your final comments.
- 
- Tip:** Take some time to read the acknowledgement carefully. It could contain important information.
6. Click **Acknowledge**.

If your manager was not your reviewer, your manager can see your performance review after you finalize it.

## Cancelling Performance Reviews

If you launched a performance review that is no longer required, you can cancel the review at any time during the review and approval process.

### To cancel a performance review:

1. Go to Setup > Performance Management > Performance Reviews.
2. Next to the performance review, click **Edit**.
3. From the **Status** list, select **Canceled**.
4. To finish, click **Save**.



**Note:** The reviewer of the performance review can view canceled reviews by going to Setup > Performance Management > Performance Reviews.

## Performance Management Saved Searches

The Performance Management feature includes a set of saved searches that you can use to find information about and report on goals and performance reviews. You can customize these saved searches to show the information that you need. For more information, see the following help topics:

- [Goal Saved Searches](#)
- [Performance Review Saved Searches](#)

## Goal Saved Searches

The following are saved searches for goals that are provided for you in your account.

Saved Search	Description	Information Included
Goals in Progress by Days Open	Displays in progress goals and the number of days that they have been open.	<ul style="list-style-type: none"> <li>■ Employee names</li> <li>■ Start date of goals</li> <li>■ Number of days that goals have been open</li> </ul>
Overdue Goals in Progress	Displays goals that are in progress after their target completion dates. Includes employees' moods about goals, and the number of days that they are overdue by.	<ul style="list-style-type: none"> <li>■ Employee names</li> <li>■ Goal names</li> <li>■ Employee moods</li> <li>■ Start date and target completion date of goals</li> <li>■ Number of days that the goal is overdue by</li> </ul>
Overview	Displays all goals in your organization and their statuses, employees' moods about their goals, and dates for the goals (start dates, target completion dates, and closed dates).	<ul style="list-style-type: none"> <li>■ Status of goals</li> <li>■ Employee names</li> <li>■ Goal names</li> <li>■ Employee moods</li> <li>■ Start date, target completion date, and closed date of goals</li> </ul>

## To view a goal saved search:

1. Go to Setup > Performance Management > Goals.
2. From the **View** list, select the saved search you want to view.
3. (Optional) To filter the results, expand the Filters section.
4. (Optional) To export the results of the saved search, do any of the following:
  - To export the results in CSV format, click the Export – CSV icon.
  - To export the results in Microsoft Excel format, click the Export – Microsoft Excel icon.
  - To export the results in PDF format, click the Export – PDF icon.
  - To export the results in Tableau Workbook format, click the Export – Tableau Workbook icon.
5. (Optional) To print the results of the saved search, click the print icon.
6. (Optional) To customize the criteria and results for this saved search, click **Customize View**. For more information about customizing saved searches, see the help topic [Defining a Saved Search](#).

## Creating a Goal Saved Search

You can create a saved search based on the goal record.

## To create a goals saved search:

1. Go to Reports > Saved Searches > All Saved Searches > New.
2. From the list of search types, select **Goal**.
3. In the **Search Title** field, enter a title for the saved search.
4. Define the criteria, results, and other parameters for the search. For more information about defining saved searches, see the help topic [Defining a Saved Search](#).
5. When you are finished, click **Save**.

## Performance Review Saved Searches

The following saved searches for performance reviews are provided for you in your account.

Saved Search	Description	Information Included
Cycle Overview	Displays an overview of the performance review cycle so that you can make sure reviews are being completed on time.	<ul style="list-style-type: none"> <li>■ Performance review statuses</li> <li>■ Employee due dates and reviewer due dates</li> <li>■ If the review is overdue, number of days it is overdue</li> <li>■ The rating that the reviewer gave to the employee</li> </ul>
Employee Performance History	Displays a specific employee's performance history.	<ul style="list-style-type: none"> <li>■ Review period end date</li> <li>■ Name of the performance review</li> <li>■ Reviewer and the value of the rating that they gave to the employee</li> <li>■ Employee's acknowledgment</li> </ul>
Rating Distribution	Displays the performance review rating distribution by percentage so that you can	<ul style="list-style-type: none"> <li>■ Performance review template</li> </ul>

Saved Search	Description	Information Included
	see trends in employee ratings across your organization.	<ul style="list-style-type: none"> <li>■ Review period end date</li> <li>■ Reviewer rating and the value of that rating</li> <li>■ Rating distribution</li> </ul>

### To view a performance review saved search:

1. Go to Setup > Performance Management > Performance Reviews.
2. From the **View** list, select the saved search you want to view.
3. (Optional) To filter the results, expand the Filters section.
4. (Optional) To export the results of the saved search, do any of the following:
  - To export the results in CSV format, click the Export – CSV icon.
  - To export the results in Microsoft Excel format, click the Export – Microsoft Excel icon.
  - To export the results in PDF format, click the Export – PDF icon.
  - To export the results in Tableau Workbook format, click the Export – Tableau Workbook icon.
5. (Optional) To print the results of the saved search, click the print icon.
6. (Optional) To customize the criteria and results for this saved search, click **Customize View**. For more information about customizing saved searches, see the help topic [Defining a Saved Search](#).

### Creating a Performance Review Saved Search

You can create a saved search based on the performance review record.

### To create a performance review saved search:

1. Go to Reports > Saved Searches > All Saved Searches > New.
2. From the list of search types, select **Performance Review**.
3. In the **Search Title** field, enter a title for the saved search.
4. Define the criteria, results, and other parameters for the search. For more information about defining saved searches, see the help topic [Defining a Saved Search](#).
5. When you are finished, click **Save**.

## Performance Management Workbook

SuiteAnalytics Workbook offers many workbook and dataset templates, each with predefined source data, criteria, pivot tables, and charts.

This section contains the following topics for the SuiteAnalytics Performance Management — Goals and Reviews workbook:

- [Performance Management — Goals Dataset](#)
- [Performance Management — Reviews Dataset](#)
- [Performance Management — Goals and Reviews Workbook](#)

For more information about SuiteAnalytics Workbook, see the help topic [SuiteAnalytics Workbook Overview](#).

## Performance Management — Goals Dataset

This dataset combines fields from the Goal and Employee record types so that you can view a summary of employees' goals. This dataset is one of the two sources of data for the [Performance Management — Goals and Reviews Workbook](#).

### Dataset Configuration

The Performance Management — Goals dataset combines fields from the Goal and Employee record types. To edit the dataset, see the help topic [Defining a Dataset](#).

Root Record Type	Joined Record Type	Custom Formula Fields	Data Grid	Criteria Filters
Goal	Employee	<p>The following custom formula fields are included in the dataset:</p> <ul style="list-style-type: none"> <li>■ Days Overdue — Shows the number of days a goal is overdue to start by the start date or overdue to close by the target date.</li> <li>■ Modified in Last 30 Days — Only shows goals that have been modified in 30 days or less.</li> <li>■ Overdue Type — Shows if the employee is late to start a goal, late to close a goal, or if the goal is not overdue.</li> <li>■ Recent Goals — Only shows goals that are not closed and goals that have been closed in 90 days or less.</li> <li>■ Status Type — Shows if the goal is planned, in progress, completed, not completed, or cancelled.</li> </ul>	<p>The following record fields are included in the dataset:</p> <p>Goal:</p> <ul style="list-style-type: none"> <li>■ Actual</li> <li>■ Closed Date</li> <li>■ Employee</li> <li>■ Internal ID</li> <li>■ Name</li> <li>■ Performance Metric</li> <li>■ Progress (%)</li> <li>■ Start Date</li> <li>■ Target</li> <li>■ Target Completion Date</li> </ul> <p>Employee:</p> <ul style="list-style-type: none"> <li>■ Department</li> <li>■ Supervisor</li> </ul>	(none)

## Performance Management — Reviews Dataset

This dataset combines fields from Performance Review and Employee record types so that you can view a summary of employees' performance reviews. This dataset is one of the two sources of data for the [Performance Management — Goals and Reviews Workbook](#).

### Dataset Configuration

The Performance Management — Reviews dataset combines fields from five record types. To edit the dataset, see the help topic [Defining a Dataset](#).

Root Record Type	Joined Record Types	Custom Formula Fields	Data Grid	Criteria Filters
Performance Review	Employee Employee Overall Rating	The following custom formula fields are included in the dataset:	The following record fields are included in the dataset:	(none)

Root Record Type	Joined Record Types	Custom Formula Fields	Data Grid	Criteria Filters
	Reflection  Reviewer Overall Rating	<ul style="list-style-type: none"> <li>■ Author (Employee or Reviewer) — Shows if the answer was written by the employee or the reviewer.</li> <li>■ Characters per Answer — Shows the average number of characters the employee or reviewer wrote for their performance review answers.</li> <li>■ Days Overdue — Shows the number of days a performance review is overdue.</li> <li>■ Overall Rating Difference — Shows the numerical difference between the reviewer's overall rating value and the employee's overall rating value.</li> <li>■ Overdue Type — Shows if the employee's self review is overdue, the performance review is overdue, the employee's acknowledgment is overdue by more than 30 days, or the review is not overdue.</li> </ul>	<p>Performance Review:</p> <ul style="list-style-type: none"> <li>■ Employee</li> <li>■ Employee Due Date</li> <li>■ Employee Submitted Date</li> <li>■ Internal ID</li> <li>■ Name</li> <li>■ Performance Review Template</li> <li>■ Review Completion Date</li> <li>■ Review Due Date</li> <li>■ Review Period End</li> <li>■ Review Period Start</li> <li>■ Review Status</li> <li>■ Reviewer</li> <li>■ Reviewer Submitted Date</li> </ul> <p>Employee:</p> <ul style="list-style-type: none"> <li>■ Department</li> </ul> <p>Employee Overall Rating:</p> <ul style="list-style-type: none"> <li>■ Name</li> <li>■ Value</li> </ul> <p>Reflection:</p> <ul style="list-style-type: none"> <li>■ Question</li> </ul> <p>Reviewer Overall Rating:</p> <ul style="list-style-type: none"> <li>■ Name</li> <li>■ Value</li> </ul>	

## Performance Management — Goals and Reviews Workbook

This workbook is based on the Performance Management — Goals dataset and the Performance Management — Reviews dataset. With the Performance Management — Goals and Reviews workbook, you can assess goal and performance review related information for the employees in your organization. The pivot tables and charts included in this workbook have filters to ensure relevant data is displayed.

To access the workbook, click the **Performance Management — Goals and Reviews** link from the Workbook Templates list on the Workbook subtab of the Analytics Home page.

The following pivot tables and charts are predefined in the Performance Management — Goals and Reviews workbook:

- **Goals by Status** — A chart that displays the number of goals that are in each status.
- **Overdue Goals** — A pivot table that displays the number of days an employee is late to start a goal, late to close a goal, or if their goal is not overdue.

- **Goal Outliers** — A pivot table that displays the number of goals an employee has and how many of their goals have not been updated in two months. Human resources can use this information to follow up with employees on unusual goal activity.
- **Performance Metrics Alignment** — A chart that displays the number of goals that are tracked with each performance metric.
- **Review by Status** — A chart that displays the number of performance reviews that are in each status.
- **Overdue Reviews** — A pivot table that displays the number of days an employee's self review is late, a reviewer's performance review is late, and an employee's acknowledgment is late by more than thirty days. Does not display reviews that are not overdue.
- **Overall Rating Distribution** — A chart that displays the percentage of performance reviews that were given each type of overall rating.
- **Review Outliers** — A pivot table that displays the difference between a reviewer's overall rating and an employee's overall rating on performance reviews. Also displays the average number of characters an employee or reviewer wrote per answer on performance reviews. Human resources can use this information to follow up with employees and reviewers on any unusual performance review activity.

For more information about SuiteAnalytics Workbooks, see the help topic [SuiteAnalytics Workbook Overview](#).

## Kudos

With the Kudos feature, your employees can give recognition to each other for accomplishments, achievements, and milestones. Your employees use their Employee Center roles to give and interact with Kudos. When employees give Kudos to each other, they can include a short message. This message explains why the employee is being recognized. The writer can also indicate any of your company's organizational values that the employee's actions support.

Completed Kudos then appear in the Employee Center on a newsfeed portlet, where other employees can see them and add their support. Kudos can be filtered by department and location.

The Kudos feature includes a list of sample organization values. You can use, edit, or delete these values, or you can create new values that match your organizational culture.

For more information about Kudos, see the following topics:

- [Kudos Permission Requirements](#)
- [Renaming Kudos](#)
- [Giving Kudos to Coworkers](#)
- [Giving Kudos to Coworkers in the Employee Center](#)
- [Interacting with Kudos in the Employee Center](#)

## Kudos Permission Requirements

If you use the Kudos feature, the Kudos permission needs to be assigned to roles to use this feature. Additionally, if users need to create or edit organization values, the Organization Values permission should be assigned at access level Create or Edit.

The Kudos and Organization Values permissions are located on the Lists tab of the Role page. For a list of the standard roles assigned to this permission, see the help topic [Standard Roles Permissions Table](#).

The following table lists the permission level a user must have to perform certain tasks related to these features.

Permission	Subtab	Permission Access Level	Supported Functionality
Kudos	Permissions > Lists	View	Allows users to receive and view Kudos. Users cannot create new, edit, or delete Kudos.
		Create	Allows users to give Kudos. Users cannot edit or delete Kudos.
		Edit	Allows users to edit the Inactive field. Users cannot delete Kudos.
		Full	Allows users to edit the Inactive field and delete Kudos.
Organization Value	Permissions > Lists	View	Allows users to view company organizational values. Users cannot create, edit, or delete organizational values.
		Create	Allows users to create and view organizational values. Users cannot edit or delete organizational values.
		Edit	Allows users to create, view, and edit organizational values. Users cannot delete organizational values.
		Full	Allows users to create, view, edit, and delete organizational values.

## Renaming Kudos

Kudos are used to recognize coworkers for a job well done. They are given to someone for making an outstanding contribution, providing a great idea, or for helping out on a project. If required, Kudos can be renamed in your NetSuite account to better match your company culture.

### Prerequisites

To rename Kudos, the Kudos feature must be enabled in your account and you must be assigned to a role that includes the Kudos permission.

#### To rename Kudos:

1. Go to Setup > Company > Rename Records/Transactions.
2. On the Rename Records/Transactions page, the default names for records are autofilled in the fields.
3. In the **Name For Kudos** field, enter the name you want to use.
4. Click **Save**.

## Creating Organization Values

The Kudos feature includes a list of sample organization values. You can use, edit, or delete these values, or you can create new values that match your organizational culture.

## To create an organization value:

1. Go to Setup > Performance Management > Organization Values. The Organization Values list page shows the values that employees can assign to Kudos.
2. Click **New Organization Value**.
3. Enter a unique name for the value in the **Name** field.
4. (Optional) In the **Description** field, enter a description of what the value means.
5. (Optional) From the **Image** list, select an image for the value .
6. Click **Save**.

## Giving Kudos to Coworkers in the Employee Center

You use Kudos to recognize your coworkers for a job well done. You could give Kudos to someone for making an outstanding contribution, providing a great idea, or giving you help on a project. You can give Kudos to more than one coworker. You describe why you are giving them Kudos, and then choose some organizational values that your coworker demonstrated.

The best way to give Kudos is to use your Employee Center role.

### To give Kudos to coworkers:

1. From the home screen of your Employee Center role, in the Kudos portlet, click in the **Give Kudos to...** box. If your Kudos portlet is in the narrow configuration, click **Give Kudos**.
2. Begin typing a coworker's name. As you type, suggested names appear.
3. If you want to give Kudos to more than one coworker at a time, add more names.
4. In the text field, type a description for the Kudos that explains why you want to recognize your coworkers.
5. In the Supported Values section, click the organizational values that this Kudos demonstrates. When you hover over a values icon, a description of that value appears.
6. Click **Give Kudos**.

Your kudos appear in the Kudos portlet.

 **Note:** You can also give Kudos from other roles by going to Setup > Performance Management > Kudos > New.

## Implications of Deleting Employees

When employees leave your company, you should deactivate or terminate them, rather than delete their employee record. If you decide to delete an employee record from your NetSuite account, this has the following effects on Kudos:

- If the employee was the only recipient of any Kudos, those Kudos are deleted.
- If the employee was one of several recipients of Kudos, the employee's name is removed from the Kudos, but the Kudos is not deleted.
- If the employee gave Kudos to coworkers, you cannot delete the employee record until you delete all Kudos that the employee gave. Instead, you may want to deactivate or terminate the employee. For more information, see [Inactivating Employee Records](#) and [Employee Termination](#).

## Interacting with Kudos in the Employee Center

The Kudos portlet shows a newsfeed-style display of the Kudos that have been given in your company. The Kudos portlet displays the dates that Kudos are given. Here are some ways you can interact with the Kudos feed:

- To show support for a Kudos that someone else has given, click the Support button beside the Kudos. The button shows how many people have shown their support for the Kudos.
- By default, the Kudos portlet shows Kudos given across your entire company. To filter the Kudos to just one department, click the Dropdown button beside **My Company** and select a department.
- To search for a person's name or a word or phrase in Kudos descriptions, enter a term in the search field and click the **Search** button.

# Compensation Tracking

With the Compensation Tracking feature, you can track employees' base pay and bonuses. When this feature is enabled, the Compensation Tracking tab appears on the employee record.

If you use [SuitePeople U.S. Payroll](#), the wage and salary information that you enter in the Compensation Tracking tab can be copied to Payroll. When an employee's compensation information changes, you update the information in only one place. As well, bonuses that you enter in the Compensation Tracking tab can be included in payroll batches for the appropriate pay periods. For more information, see [Integrating Employees' Base Pay Information with Payroll](#) and [Integrating Bonuses with Payroll](#).

For information about the permissions required to use the Compensation Tracking feature, see [Compensation Tracking Permission Requirements](#).

The Compensation Tracking feature also includes the Employee Bonus History and Current Compensation Workbook. With this workbook, you can view a summary of employees' current base compensation and a history of employees' bonuses. For more information, see [Employee Bonus History and Current Compensation Workbook](#).

Watch the following help videos for information about using the Compensation Tracking feature:

-  [Tracking Compensation in NetSuite](#)
-  [Awarding Bonuses in NetSuite](#)

## Compensation Tracking Setup

To set up the Compensation Tracking feature, you need to enable the feature, integrate the feature with SuitePeople U.S. Payroll (if applicable), and create bonus types.

### Enabling the Compensation Tracking Feature

The Compensation Tracking feature requires SuitePeople HR. For more information about SuitePeople, see [SuitePeople Overview](#). If your account is set up for SuitePeople HR, you can enable the Compensation Tracking feature.

#### To enable the Compensation Tracking feature:

1. Go to Setup > Company > Enable Features.
2. Click the **Employees** subtab.
3. Check the **Compensation Tracking** box.
4. Click **Save**.



**Note:** When you enable the Employee Change Requests feature, the Compensation Tracking feature is automatically enabled.

## Integrating Employees' Base Pay Information with Payroll

When both the Payroll and the Compensation Tracking features are enabled, compensation integration options appear on the Set Up Payroll (Setup > Payroll > Set Up Payroll) page. With these options, you can synchronize employees' base pay information with SuitePeople U.S. Payroll. After you update an employee's salary or wage on the Compensation Tracking Subtab of the employee record, the base wage type and amount are copied to the Payroll subtab.

To use Payroll with Compensation Tracking, make sure you do the following:

- Assign a primary payroll item to each employee who is already included in Payroll. If more than one payroll item is associated with an employee, the Compensation Tracking feature updates the primary payroll item with base compensation information. You can set the primary payroll item in the Earnings subtab of the Payroll subtab on the employee record. For more information, see the help topic [Setting up Earnings for an Employee](#).
  - Set a default salary payroll item and a default wage payroll item. Default payroll items are used for one of two reasons:
    - When an employee's pay type is changed from salary to wage or from wage to salary in Compensation Tracking
    - When a wage or salary payroll item is not already associated with the employee
- If default payroll items are not set up, your employees might not be paid correctly.

### To integrate employees' base pay information with Payroll:

1. Go to Setup > Payroll > Set Up Payroll.
2. On the **Compensation Integration** subtab, check the **Copy Compensation Tracking Data to Payroll** box.
3. In the **Default Salary Payroll Item** list, select a default salary payroll item.
4. In the **Default Wage Payroll Item** list, select a default wage payroll item.
5. Click **Save**.

## Integrating Bonuses with Payroll

If you use SuitePeople U.S. Payroll, you can pay bonuses to employees when you create payroll batches. To ensure that bonuses that you track with the Compensation Tracking feature are included in payroll batches, you need to:

- Create bonus payroll items
- Assign the payroll items to employees
- Create bonus types and associate bonus payroll items with bonus types
- Include bonuses in payroll batches

Throughout these steps, you also need to update payroll information.

### To integrate bonuses with payroll:

1. Create a bonus payroll item using the payroll item type **Earning:Addition**. For more information, see the help topics [Payroll Item Types](#) and [Creating Payroll Items](#).
2. Create a bonus type that you associate with the bonus payroll item. For more information, see [Creating Bonus Types](#).
3. To commit your updates to the Payroll server, update payroll information. For more information, see the help topic [Updating Payroll Information](#).
4. Assign the bonus payroll item to the appropriate employees.
  - a. Go to Lists > Employees > Payroll Items.
  - b. In the list, beside the bonus payroll item that you created, click **Edit**.
  - c. In the **Employees** table, beside each employee who should have the payroll item, check the **Apply** box.



**Note:** Each of these employees must be included in Payroll. For more information, see the help topic [Including an Employee in Payroll](#).

- d. Enter an **Effective Date** and an **Expiration Date** for each applicable employee.
- e. Leave the **Rate** fields blank.
- f. Click **Save**.
5. To commit your updates to the Payroll server, update payroll information again. For more information, see the help topic [Updating Payroll Information](#).
6. To make sure that Bonuses are included in payroll batches, on a payroll batch, check the **Pay Bonuses** box. For more information, see the help topic [Selecting Payment Options for a Payroll Batch](#).



**Tip:** You can set a preference so that the Pay Bonuses box is checked by default on payroll batches. Go to Setup > Payroll > Set Up Payroll. On the **Preferences** tab, check the **Default "Pay Bonuses" on Paychecks** box.

## Creating Bonus Types

Before you can create bonuses, you need to define the bonus types that your organization uses. For example, you might have merit bonuses, spot bonuses, sign-on bonuses, or holiday bonuses.

If you want to use SuitePeople U.S. Payroll to pay bonuses to employees, you need to associate a bonus type with a payroll item. If some of your employees are included in SuitePeople U.S. Payroll and other employees are not, you should create separate bonus types for Payroll. For example, you might create one bonus type called Spot Bonus - Payroll and another called Spot Bonus.

### To create a bonus type:

1. Go to Setup > HR Information System > Bonus Type > New.
2. In the **Name** field, enter a name for the bonus type. Each bonus type must have a unique name.
3. In the **Subsidiary** field, select the subsidiary that can use this bonus type.
4. If applicable, in the **Payroll Item** list, select a payroll item to associate with this bonus type.



**Note:** You add a payroll item only to bonus types that apply to employees who are included in SuitePeople U.S. Payroll. If some of your employees are included in Payroll, and others are paid with a separate payroll solution, then you should create separate bonus types.

5. Click **Save**.



**Note:** If you are using SuitePeople U.S. Payroll, the payroll item that is associated with the bonus type must be assigned to employees who are eligible for the bonus type. For more information, see [Integrating Bonuses with Payroll](#).

## Recording Base Pay Compensation for an Employee

Base pay compensation includes an employee's regular salary or wage earnings.



**Important:** If base pay information is integrated with SuitePeople U.S. Payroll, before you make updates to base pay fields, make sure that you have permission to edit the fields in the Payroll > Earnings subtab on the employee record. If you do not have permission to edit the fields in the Payroll > Earnings subtab, changes that you make to the Compensation Tracking fields are not copied to Payroll. This could result in incorrect payments to employees.

### To track an employee's base pay compensation:

1. Go to Lists > Employees > Employees.
2. Beside an employee, click **Edit**.
3. Click the **Compensation Tracking** subtab.
4. Enter the employee's base pay information. You must enter values into all base pay fields:
  - From the **Base Wage Type** list, select the base wage type. Selections include annual salary, hourly, and monthly salary.



**Note:** If base pay information is integrated with SuitePeople U.S. Payroll, and if the employee is included in payroll, the value in the **Base Wage Type** list is copied to the **Compensation Type** field on the Payroll subtab. This value cannot be edited.

- From the **Compensation Currency** list, select the currency to use.



**Note:** If base pay information is integrated with SuitePeople U.S. Payroll, and if the employee is included in payroll, the currency is set to U. S. Dollars (USD) and cannot be edited.

- In the **Base Wage** field, enter the employee's base wage.
- 5. Click **Save**.

## Entering a Bonus Target for an Employee

With bonus targets, you can track employees' bonus eligibility. For example, some employees might be eligible for a bonus that is 10 percent of their annual salary, one time a year, so their bonus target is 10 percent, and their target frequency is annually.

Bonus targets are for tracking purposes. Bonus targets do not impact the amount that you award in an actual bonus or bonuses that are paid using SuitePeople U.S. Payroll.

### To enter bonus targets for an employee:

1. Go to Lists > Employees > Employees.
2. Beside an employee, click **Edit**.
3. Click the **Compensation Tracking** subtab.
4. In the **Bonus Target** field, enter a numeric value for the bonus target.

For example, if the bonus target is 10 percent, enter 10. If the bonus target is \$10,000, enter 10,000.

5. In the **Target Type** list, select **Percentage** or **Amount**.

For example, if the bonus target is 10 percent, enter 10 in the Bonus Target field and select Percentage from the Target Type list. If the bonus target is a specific amount, enter the amount in the Bonus Target field and select Amount from the Target Type list.

6. In the **Target Frequency** list, select how often this bonus could be awarded to the employee. You can choose from one time, annually, monthly, or quarterly.
7. To include additional relevant information about the employee's bonus target, enter comments in the **Target Comments** field.
8. Click **Save**.

## Awarding a Bonus to an Employee

When you award a bonus to an employee, you either track the bonus in NetSuite and pay the bonus using another system, or pay the bonus using SuitePeople U.S. Payroll.

### To award a bonus to an employee:

1. Go to Lists > Employees > Employees.
2. Click an employee.
3. Click the **Compensation Tracking** subtab.
4. Click **Award Bonus**.
5. From the **Bonus Type** list, select a bonus type.

**Note:** To pay the bonus using SuitePeople U.S. Payroll, select a bonus type that is associated with a payroll item. For more information, see [Creating Bonus Types](#).

6. Enter the bonus amount either as a **Percentage** of the employee's base wage or as a specific **Amount**.

The currency is set to the employee's current compensation currency. The percentage is based on the employee's current base wage. If the employee's base wage changes before the award date, the bonus amount does not change.

**Note:** If the employee's base wage type is hourly, the Percentage option is not available.

7. In the **Award Date** field, enter the date when the employee should receive the bonus.

If you are using SuitePeople U.S. Payroll to pay this bonus, the bonus is included on a payroll batch when the award date is within the payroll batch's pay period.

**Note:** If an employee is terminated before than the award date, the bonus is not included in the corresponding payroll batch, even if other payments are made to the employee.

8. If applicable, from the **Payment Status** list, select a payment status that applies to the bonus:
  - **None** – This is the default status. Use this status if you do not track payment statuses.
  - **Ready to Pay** – You are ready to pay this bonus to the employee.
  - **Processing Payment** – Your payroll system is processing the bonus payment.
  - **Paid** – The employee has received the bonus payment.
  - **Canceled** – The bonus has been canceled and will not be paid.

Payment statuses are not available for bonuses that will be paid with SuitePeople U.S. Payroll.

9. To include additional relevant information about the employee's bonus, enter comments in the **Comments** field.
10. Click **Save**.

## Editing a Bonus

If a bonus is **not** paid using SuitePeople U.S. Payroll, you can edit the bonus percentage, amount, award date, payment status, or comments. You cannot edit the employee or the bonus type.

If a bonus is paid using SuitePeople U.S. Payroll, you cannot edit the bonus. If you included a bonus in a payroll batch in error, then you might need to revert the payroll batch and then cancel the bonus. For more information, see the help topics [Creating a Payroll Reversal](#) and [Canceling a Bonus that is in a Reversed Payroll Batch](#).

### To edit a bonus:

1. Go to Lists > Employees > Employees.
2. Beside an employee, click **Edit**.
3. Click the **Compensation Tracking** subtab.
4. In the Bonuses section, click the number beside a bonus.
5. Make any changes.
6. Click **Save**.

## Deleting a Bonus

If you are using SuitePeople U.S. Payroll to pay a bonus, you can delete a bonus only if it is **not** included in a payroll batch.

If you are not using SuitePeople U.S. Payroll to pay a bonus, you can delete the bonus at any time.

### To delete a bonus:

1. Go to Lists > Employees > Employees.
2. Beside an employee, click **Edit**.
3. Click the **Compensation Tracking** subtab.
4. In the Bonuses section, click the number beside a bonus.
5. From the Actions menu, click **Delete**.

## Canceling a Bonus that is in a Reversed Payroll Batch

If a bonus is included in a reversed payroll batch, by default, SuitePeople U.S. Payroll includes the bonus in the next payroll batch. If you do not want to include the bonus in the next payroll batch, you can cancel the bonus. You cannot undo this action.

**To cancel a bonus from a reversed payroll batch:**

1. Go to Lists > Employees > Employees.
2. Beside an employee, click **Edit**.
3. Click the **Compensation Tracking** subtab.
4. In the Bonuses section, click the number beside a bonus.
5. From the Actions menu, click **Exclude From Payroll**.
6. Read the confirmation dialog. If you still want to cancel the bonus, click **OK**.

# Job Management

The Job Management feature enables you to organize your employees according to the jobs that they perform.

There are two features that make up job management:

- Job Management - Lets you create jobs with job descriptions and assign employees to them. For more information, see [Managing Jobs](#).
- Job Requisitions - Lets you create job requisitions for recruiting, and then associate them with jobs that you have defined. Then, you can track their status through the hiring process. For more information, see [Job Requisitions](#).

A job is a description of what work and responsibilities an employee could have. A job can exist in several departments, locations, and subsidiaries. You can assign several employees to one job.

Depending upon the level of complexity your organization requires, you can choose to use the Job Management feature alone, or couple it with Job Requisitions.

Here are some notes highlighting how these features interact:

- The Job Requisition feature requires that the Job Management feature be enabled.
- When you enable the Job Management feature, job names that exist in the **Job Title** fields on the employees' records are converted to job records. If you decide to disable the Job Management feature, job names in the job records are converted back to text in the **Job Title** fields.



**Note:** When you enable the Employee Change Requests feature, the Job Management feature is automatically enabled.

## Job Management and Job Requisitions Prerequisites

To use the Job Management and Job Requisitions features the following permissions are required:

- The List > Employees permission is required at a minimum level of Edit for both Job Management and Job Requisitions.
- To use Job Management the List > Job Management permission is required at a minimum level of Create.
- To use Job Requisitions the List > Job Requisitions permission is required at a minimum level of Create.

For information about the permission requirements, see [Job Management and Job Requisitions Permission Requirements](#).

The standard roles that come with these permissions are HR Generalist, Administrator, and Chief People Officer (CPO).

You can also create custom roles that include this permission. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).



**Note:** If you want more control over what employee information is accessible by different NetSuite users you can use the Advanced Employee Permissions feature. When this feature is enabled, you can use the employee permissions that come with this feature. These permissions give you more control over what employee information certain roles can access. You can also customize employee permission that include all or set of standard fields and sublists from the employee record. For more information, see [Advanced Employee Permissions](#).

## Managing Jobs

Job records enable you to store and maintain information about each of the jobs in your organization. A job is a description of what work and responsibilities an employee could have. A job can exist in several departments, locations, and subsidiaries. If you are using the Job Management feature alone, you assign jobs to employees.

### Adding or Editing Jobs

Use the following procedure to add or edit jobs.

#### To add or edit a job:

1. Go to Setup > HR Information System > Jobs > New, or click **New Job** on the Jobs list page. To modify the details of an existing job record, go to Setup > HR Information System > Jobs. Click **Edit** next to the name of the job.
2. In the **Title** field, enter a name for the job.
3. In the **Description** field, enter a short unique description for the job.
4. Select the category (**Full-time, Part-time**) from the **Employment Category** list.
5. If you use NetSuite OneWorld, select the subsidiary in which this job will exist from the **Subsidiary** list.
6. If you want this job to be inactive, check the **Job is Inactive** box. This affects how the job appears on the Jobs list.
7. Click **Save**.



**Note:** The Job ID is a read-only field generated by NetSuite when the job record is created.

### Viewing the List of Jobs

Use the following procedure to view the list of jobs.

#### To view the list of jobs:

1. Go to Setup > HR Information System > Jobs.
2. To see all inactive job records, check the **Show Inactives** box.
3. To view an individual job record, click **View** beside the job.

## Deleting a Job

Use the following procedure to delete a job.

### To delete a job:

1. Go to Setup > HR Information System > Jobs.
2. Click **Edit** beside the job you want to delete.
3. Select **Delete** from the **Actions** menu.
4. When prompted to confirm the deletion, click **OK**.

When you attempt to delete a job with one or more employees assigned to it, note the following. NetSuite redirects you to the dependent records page, which lists all the employees currently assigned to the job. Each employee must be unassigned from the job before it can be deleted.

## Assigning Employees to Jobs

If you are using the Job Management feature, you can assign employees to jobs. A job is a description of what work and responsibilities an employee could have. A job can exist in several departments, locations, and subsidiaries.

### To assign an employee to a job:

1. Go to Lists > Employees > Employees.
2. Click **Edit** beside the employee you want to assign a job to.
3. Select a job from the **Job** list found in the primary information section of the employee record page.
4. If you use both the Job Management and Position Management features, click the **Human Resources > Job** subtab, select **Job** under Work Assignment. Then, select a job from the **Job** list. To create a new job from this page, click **New**. For more information about creating a job, see the help topic [Adding or Editing Jobs](#).



**Note:** When an employee is assigned a job you can directly access the associated record by clicking the **Job Title** field from the employee record.

5. Click **Save**.

## Job Requisitions

If you are using the Job Management feature, you can also enable the Job Requisition feature to create job requisitions and associate them with jobs.

## Creating a Job Requisition

Use the following procedure to create a job requisition.

### To create a job requisition:

1. Go to Setup > HR Information System > Job Requisitions > New, or click **New Job Requisition** on the Job Requisition list page.

To modify the details of an existing job requisition, go to Setup > HR Information System > Job Requisition. Click **Edit** beside the name of the job requisition.

2. Select the job associated with this job requisition from the **Job** list. The **Title**, **Job Description**, and **Posting Description** fields are populated from the job description for the selected job. The **Job Description** field is read-only, but you can edit the **Title** and the **Posting Description**. The **Posting Description** is the description used for external job postings.



**Note:** The **Posting Description** is the description used for external job postings.

3. Select a status for the job requisition from the **Status** list: **Pending Approval**, **Draft**, **On-Hold**, **Open**, **Closed**, or **Filled**.
4. In the **Headcount** field, enter the number of employees you need in order to fill this job requisition.
5. Select whether the job requisition posting is internal, external, or both from the **Posting Type** list.
6. If you use NetSuite OneWorld, select the **Subsidiary** from the list.
7. Select the **Department**, **Location**, and **Class** for the job requisition from the lists.
8. Select the date when this job requisition becomes open from the **Open Date** field.
9. Select the date when this job requisition expires from the **Close Date** field. This must be after the open date.
10. Select the anticipated target date by which this job requisition should be filled from the **Target Hire Date** field. This date must either be between the open date and close date, or on either of these dates.
11. Select the appropriate employees from the **Hiring Manager**, **Recruiter**, and **Approved By** lists.
12. If you want this job requisition to be inactive, check the **Inactive** box. This affects how the job requisition appears on the Job Requisition list.
13. Click **Save**.

## Viewing Job Requisitions

Use the following procedure to view job requisitions.

### To view the list of job requisitions:

1. Go to Setup > HR Information System > Job Requisitions.
2. To see all inactive job requisitions, check the **Show Inactives** box.
3. To view an individual job requisition record, click **View** beside the job.

## Deleting Job Requisitions

Use the following procedure to delete job requisitions.

### To delete a job requisition:

1. Go to Setup > HR Information System > Job Requisitions.
2. Click **Edit** beside the job requisition you want to delete.

3. Select **Delete** from the Actions menu.
4. When prompted to complete the deletion, click **OK**.

To access job requisition saved searches, see [Recruiting Reports](#).

# Advanced Employee Permissions

This chapter includes the following help topics:

- [Advanced Employee Permissions Overview](#)
- [Before Enabling the Advanced Employee Permissions Feature](#)
- [Advanced Employee Permissions and Standard NetSuite Roles](#)
- [Employee Self Permission Overview](#)
- [Employee Public Permission Overview](#)
- [Employee Confidential Permission Overview](#)
- [Employee Compensation Permission Overview](#)
- [Employee Access Tab Permission Overview](#)
- [Employee Administration Permission Overview](#)
- [Employee Record Full Permission Overview](#)
- [Advanced Employee Permissions Use Cases](#)
- [Setting Employee Access for Advanced Employee Permissions](#)
- [Custom Advanced Employee Permissions](#)
- [Creating Custom Fields for Advanced Employee Permissions](#)
- [Creating Custom Sublists for Advanced Employee Permissions](#)
- [Custom Restrictions for Advanced Employee Permissions](#)

## Advanced Employee Permissions Overview

The Advanced Employee Permissions feature gives administrators control over which fields and sublists on the employee record are available to the role. This availability is based on the assigned employee permissions.

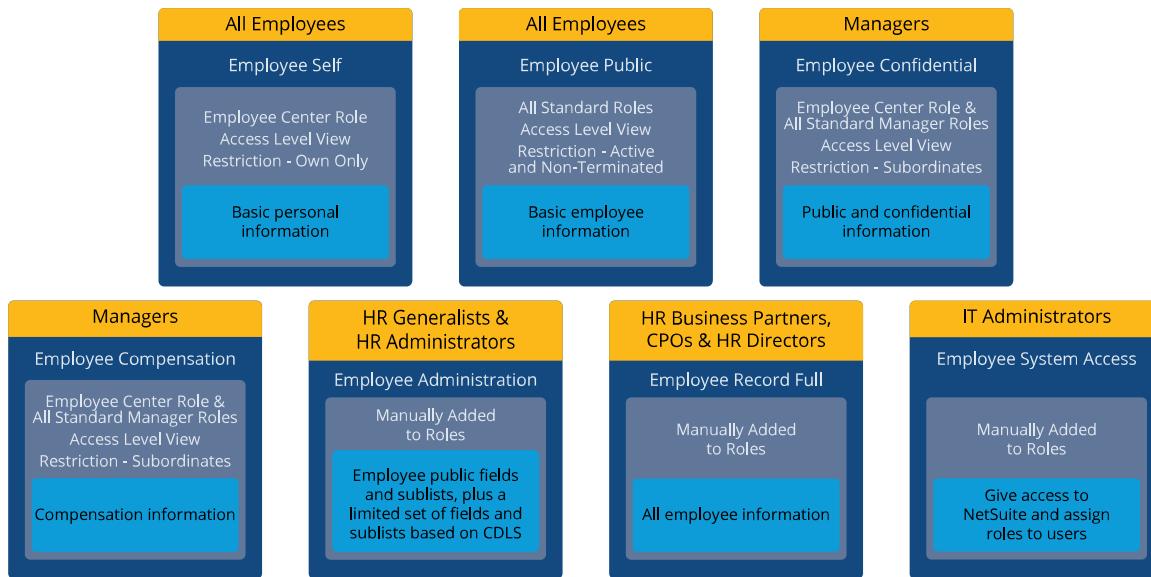
This feature includes the following permissions, which are automatically assigned to a set of standard NetSuite roles, except where otherwise noted. For more information, see [Advanced Employee Permissions and Standard NetSuite Roles](#).

- **Employee Self** – Roles with this permission have access to basic personal information about themselves on their employee record. They can also use their Employee Center role by clicking **My Profile** under **My Information**. For more information, see [Employee Self Permission Overview](#).
- **Employee Public** – Roles with this permission have access to basic employee information, such as job title. For more information, see [Employee Public Permission Overview](#).
- **Employee Confidential** – Roles with this permission have access to a set of fields and sublists. For example, the **Billing Class** field, and the **Time-Off** subtab. For more information, see [Employee Confidential Permission Overview](#).
- **Employee Compensation** – Roles with this permission have access to compensation information, such as base wage and base wage type. For more information, see [Employee Compensation Permission Overview](#).
- **Employee Access Tab** – Roles with this permission can give users access to NetSuite and assign roles to users. The Employee Access Tab permission is not automatically assigned to any roles when the feature is enabled. For more information, see [Employee Access Tab Permission Overview](#).

- Employee Administration** – Roles with this permission have access to basic employee information, and fields and sublists based on Class, Department, Location, and Subsidiary (CDLS). The Employee Administration permission is not automatically assigned to any roles when the feature is enabled. For more information, see [Employee Administration Permission Overview](#).
- Employee Record Full** – Roles with this permission have access to all employee information. For more information, see [Employee Record Full Permission Overview](#).



**Note:** The Advanced Employee Permissions feature is available only for accounts with SuitePeople HR provisioned. For more information, see [SuitePeople Overview](#).



If your role has appropriate permission, you can create custom employee permissions to include standard fields and sublists from the employee record. You can also add custom fields and sublists to custom employee permissions. For more information, see [Custom Advanced Employee Permissions](#).

If your role has the appropriate permission, you can also customize restrictions for Advanced Employee Permissions. For more information, see [Custom Restrictions for Advanced Employee Permissions](#).



**Note:** Inline editing is available only with the Lists > Employees permission at access level Edit or higher.



**Note:** Advanced Employee Permissions lets users who have access to effective dating logs see content based on the permissions and restrictions assigned to their role. For example, roles with the Employee Confidential permission see effective dating logs only for their direct reports and below. For more information, see [Effective Dating for Employee Information](#).

## Advanced Employee Permissions Videos

Watch the following help videos for information about using the Advanced Employee Permissions feature.

- [Advanced Employee Permissions Overview — Video 1 of 4](#)
- [Creating Custom Advanced Employee Permissions — Video 2 of 4](#)
- [Customizing a Role Using Advanced Employee Permissions — Video 3 of 4](#)



[Using Advanced Employee Permissions — Video 4 of 4](#)

## Before Enabling the Advanced Employee Permissions Feature



**Note:** The Advanced Employee Permissions feature is available only for accounts with SuitePeople HR provisioned. For more information, see [SuitePeople Overview](#).



**Warning:** The Advanced Employee Permissions feature changes the way employee information is exposed to users. This feature should only be enabled by an administrator who has a thorough understanding of NetSuite. Because these changes extend to all parts of NetSuite, test this feature in a sandbox account before enabling it in a production account.

This section describes how access to the employee record, using different contexts, changes when the Advanced Employee Permissions feature is enabled. You should go through the following list before you enable the feature. If required, complete any of the recommended actions. For more information, contact NetSuite Customer Support.

- [Advanced Employee Permissions and Employee Searches](#)
- [Advanced Employee Permissions and Saved Searches](#)
- [Advanced Employee Permissions and Employee List View Results](#)
- [Advanced Employee Permissions and NetSuite Reports](#)
- [Advanced Employee Permissions and Employee Templates](#)
- [Advanced Employee Permissions and Contact Records](#)
- [Advanced Employee Permissions and Subrecords](#)
- [Advanced Employee Permissions and SuiteScript](#)
- [Advanced Employee Permissions and SuiteFlow](#)
- [Advanced Employee Permissions and SuiteAnalytics Connect](#)
- [Advanced Employee Permissions and CSV Import](#)
- [Advanced Employee Permissions and SOAP Web Services](#)
- [Advanced Employee Permissions and Customizations](#)

## Advanced Employee Permissions and Employee Searches



**Important:** Before you enable Advanced Employee Permissions, review existing saved employee searches, and limit access to any searches that are not relevant to some users.



**Note:** The Advanced Employee Permissions feature is available only for accounts with SuitePeople HR provisioned. For more information, see [SuitePeople Overview](#).

When Advanced Employee Permissions is not enabled, employees can only perform employee searches if they have the following permissions:

- [Lists > Employees](#)

- Lists > Employee Record
- Lists > Perform Search

However, when Advanced Employee Permissions is enabled, many standard NetSuite roles automatically have the Employee Public permission, and the Lists > Employee Record permission. These permissions give them the ability to perform employee searches.

## Advanced Employee Permissions and Saved Searches

Based on the employee permissions assigned to the role, users see different results when viewing the same employee saved search. Some columns in the search results are hidden, depending on what the role has access to. When the filter criteria of a saved search uses a field unavailable to the employee permissions assigned to the role, the filter is not applied.

The following examples outline what information is exposed to a role when a saved search is run using the same filter criteria. The examples use different Advanced Employee Permissions.

### Example 1 – Saved Search Results with Employee Public Permission

Advanced Employee Permissions	Filter Criteria	Reference
Employee Public	Location – Toronto Base Wage – Greater than \$100,000	<a href="#">Employee Public Permission Overview</a>

When a role using this permission runs the saved search, the results filter by Location because this permission does not have access to Base Wage.

High Earning Employees in Toronto: Results			
Return To Criteria		Edit this Search	
FILTERS			
NAME	EMAIL	PHONE	JOB TITLE
Abraham, Deirdre	deirdre.abraham@acme.com		PS Services Resource Manager
Abraham, Emma	emma.abraham@acme.com		Manager, Human Resources
Abraham, Steven	steven.abraham@acme.com		Practice Manager
Allan, Amelia	amelia.allan@acme.com		SR PS Consultant
Anderson, Cameron	cameron.anderson@acme.com		Technical Support Specialist
Arnold, Jake	jake.arnold@acme.com		Director, Customer Support
Arnold, Simon	simon.arnold@acme.com		SVP, Customer Support
Black, David	david.black@acme.com		SR Technical Support Specialist
Brown, Trevor	trevor.brown@acme.com		Director, Human Resources
Burgess, Joan	joan.burgess@acme.com		VP, Software Sales

### Example 2 – Saved Search Results with Employee Administration Permission

Advanced Employee Permissions	Filter Criteria	Reference
Employee Administration	Location – Toronto	<a href="#">Employee Administration Permission Overview</a>

Advanced Employee Permissions	Filter Criteria	Reference
	Base Wage – Greater than \$100,000	

When a role using this permission runs the same saved search different results are shown. Only the employees who are located in Toronto and who have a base wage greater than \$100,000.00 are shown in the saved search results. In the image below, you can see that four employees meet this search criteria.

High Earning Employees in Toronto: Results				
Return To Criteria		List Search Audit Trail		
FILTERS				
EDIT   VIEW	NAME ▲	EMAIL	PHONE	JOB TITLE
Edit   View	Brown, Trevor	trevor.brown@acme.com		Director, Human Resources
Edit   View	Burgess, Joan	joan.burgess@acme.com		VP, Software Sales
Edit   View	Lambert, Ian	ian.lambert@acme.com		SR Manager, Customer Support
Edit   View	Wilson, Jacob	jacob.wilson@acme.com		Director, Sales

## Advanced Employee Permissions and Employee List View Results

The Employees List page generates the available columns, based on the fields the role has access to. The employees listed depend on which employees the role has permission to view all the fields, and that meet the set restrictions. Seeing different employees with a different combination of permissions and restrictions is expected behavior.

The following section gives examples of how the displayed information changes when using Advanced Employee Permissions.

**Important:** When using Advanced Employee Permissions you should view the Employees List page using the Basic view, instead of the default All view. With the Basic view, you see a more extensive list of employees because the basic field set is contained in most standard employee permissions. With the All view, there are more columns displayed, however, it may restrict the number of employees you see. For more information, see [Example 3 – Employee List Page Results with Employee Confidential and Employee Self Permissions](#).

## Example 1 – Employees List Page Results with Employee Confidential Permission

Advanced Employee Permissions	Default Access Level and Restriction?	Default Restriction	Fields Exposed	View	Reference
Employee Confidential	View	Subordinates	<ul style="list-style-type: none"> <li>■ First Name</li> <li>■ Last Name</li> <li>■ Email</li> <li>■ Gender</li> <li>■ Job Title</li> </ul>	All	<a href="#">Employee Confidential Permission Overview</a>

The employees that directly report to the user are shown in the list. In this example, the user has one direct report and each of the fields that are part of the Employee Confidential permission appear. The Employee Confidential permission has the default restriction of Subordinates.

The screenshot shows the Oracle NetSuite interface for the Employees list page. The top navigation bar includes links for Vendors, Payroll and HR, Reports, Setup, and Support. The user is signed in as J Wolfe from SuitePeople. The main content area displays an information message stating that some fields are hidden because the role does not have permission to view them. Below this, the 'Employees' list is shown with one record: Brad Smith, bsmith@abc.com, Accounting Manager, Male. The list includes columns for NAME, EMAIL, JOB TITLE, and GENDER, with a 'QUICK SORT' dropdown and a 'TOTAL: 1' indicator.

## Example 2 – Employees List Page Results with Employee Self Permission

Advanced Employee Permissions	Default Access Level	Default Restriction	Fields Exposed	View	Reference
Employee Self	View	Own Only	<ul style="list-style-type: none"> <li>■ First Name</li> <li>■ Last Name</li> <li>■ Email</li> <li>■ Job Title</li> <li>■ Birth Date</li> </ul>	All	<a href="#">Employee Self Permission Overview</a>

The user sees the fields exposed with the Employee Self permission only for themselves. The Employee Self permission has the default restriction of Own Only. Therefore, the user only has access to this information for themselves on their employee record.

The screenshot shows the Oracle NetSuite interface for the Employees list page. The top navigation bar includes links for Vendors, Payroll and HR, Reports, Setup, and Support. The user is signed in as J Wolfe from SuitePeople. The main content area displays an information message stating that some fields are hidden because the role does not have permission to view them. Below this, the 'Employees' list is shown with one record: J Wolfe, jwolfe@abc.com, Account Executive, 5/6/1964. The list includes columns for NAME, EMAIL, JOB TITLE, and BIRTH DATE, with a 'QUICK SORT' dropdown and a 'TOTAL: 1' indicator.

## Example 3 – Employee List Page Results with Employee Confidential and Employee Self Permissions

Advanced Employee Permissions	Default Access Level	Default Restrictions	Fields Exposed	Views	References
<ul style="list-style-type: none"> <li>■ Employee Confidential</li> <li>■ Employee Self</li> </ul>	View	<ul style="list-style-type: none"> <li>■ Subordinates</li> <li>■ Own Only</li> </ul>	<ul style="list-style-type: none"> <li>■ Employee Confidential Permission           <ul style="list-style-type: none"> <li>□ First Name</li> <li>□ Last Name</li> <li>□ Email</li> <li>□ <b>Gender</b></li> <li>□ Job Title</li> </ul> </li> <li>■ Employee Self Permission           <ul style="list-style-type: none"> <li>□ First Name</li> <li>□ Last Name</li> <li>□ Email</li> <li>□ Job Title</li> <li>□ <b>Birth Date</b></li> </ul> </li> </ul>	All and Basic	<a href="#">Employee Confidential Permission Overview</a> <a href="#">Employee Self Permission Overview</a>

With the Employee Confidential and Employee Self permission combination, the user sees an empty list. The **All** view on the Employees List page generates the available columns, based on field access for the role, across all roles. It displays all of the employees that match all the fields that the user has access to. When fields are removed from the view, you will see a generated information message.

The screenshot shows the Oracle NetSuite interface for the Employees List View. The top navigation bar includes links for Vendors, Payroll and HR, Reports, Setup, and Support. The main title is "Employees". Below the title, there are buttons for "VIEW All" and "FILTERS". The table header contains columns for NAME, EMAIL, JOB TITLE, BIRTH DATE, and GENDER. A message at the top of the table area says "No records to show.".

With the Employee Confidential and Employee Self permission combination, the **Basic** view of the Employees List page displays the users name all their direct reports. The field set contained in the Basic view is contained in most standard employee permissions.

NAME	JOB TITLE
Brad Smith	Accounting Manager
J Wolfe	Account Executive

## Advanced Employee Permissions and NetSuite Reports

Information in NetSuite reports is not governed by Advanced Employee Permissions. This means that it could be possible to accidentally disclose more information than an employee should have access to through a report. Use caution when giving employees access to reports. For more information, see the help topic [Access to Reports](#).

## Advanced Employee Permissions and Employee Templates

When Advanced Employee Permissions is enabled you can view employee templates, however you cannot create or edit employee templates. Editing or creating employee templates is supported only with the Lists > Employees permission. For more information about employee templates, see [Creating an Employee Template](#).

## Advanced Employee Permissions and Contact Records

When Advanced Employee Permissions is enabled, the **Show Employees as Contacts** field on the General Preferences page is not available. Any employees saved to a contact record do not appear on the Contacts list page. In addition, any information specific to an employee's contact record is no longer accessible.

If required, move any custom fields from the contact record to the employee record before enabling Advanced Employee Permissions.

## Advanced Employee Permissions and Subrecords

Subrecords are supported only with the Lists > Employees permission.

## Advanced Employee Permissions and SuiteScript

In NetSuite, account administrators have access to all the information on all record types, including the employee record. This can create issues in the following situations:

- When a user is assigned a role that has permission to create scripts.
- When a user sets a script to run as administrator.

A user could write or deploy a script that gains access to employee information that they would normally not have access to. This could potentially be used to compromise employee information.

When Advanced Employee Permissions is enabled, carefully track which roles have permission to create or alter scripts. In addition, track which scripts execute as administrator, and what they do to make sure employee information is not unintentionally leaked.

Assigning any of the Advanced Employee Permissions to a role gives partial access to the employee record. Some scripts (including third-party scripts) may fail when users attempt to access parts of the employee record that they are not permitted to access. For more information, see [Advanced Employee Permissions Overview](#).

If needed, consider running these scripts as administrator, or revise the scripts to handle cases where some fields and sublists are not accessible.

If you have any scripts that add buttons to the employee record, ensure that they appear only when appropriate. Configure scripts so that the action being added respects the restrictions on the employee record.

## Script Access

The following section outlines how script access changes when Advanced Employee Permissions is enabled.

The fields and sublists a user has access to can change depending on which employee record is being viewed or edited. This is different from other records in NetSuite, where permissions granted to a role determine just the instances of the record the role can see.

The search columns available to users are also dependent on the permissions assigned to the role.

In general, scripts should always check to see if the role has access to a field or sublist before trying to do something with it. Simply calling functions and methods that interact with fields and sublists before checking whether the role has access may result in inconsistent behavior.

For example, the **Department** field is permitted on the employee record. You do not have access, therefore, a null value is returned. If the field is empty, an empty string is returned.

## Script Access Examples

When you run the following script, errors generate because the script does not check if the field exists, or whether you have access to it.

```
1 | var employeeRecord = nlapiLoadRecord('employee', '115');
2 | employeeRecord.setFieldValue('department', '2');
3 | nlapiSubmitRecord(employeeRecord);
```

To check if your role has access to a field for a specific employee, load the employee record object and call `getAllFields().includes()`. If the field exists and you do have access, a true value is returned. In the following example, the user has access to the **Department** field for the employee with ID:115.

```
1 | var accessToDepartment = nlapiLoadRecord('employee', '115').getAllFields().includes('department');
```

Taking the previous two script examples into consideration, you should use the following example to make sure your scripts do not fail.

```

1 var employeeRecord = nlapiLoadRecord('employee', '115');
2 var hasAccessToDepartment = employeeRecord.getAllFields().includes('department');
3 if (hasAccessToDepartment)
4 {
5     employeeRecord.setFieldValue('department', '2');
6 }
7 nlapiSubmitRecord(employeeRecord);

```

For more information about working with SuiteScript, see the help topics [Suitelets and UI Object Best Practices](#) and [Client Script Best Practices](#).

## Advanced Employee Permissions and SuiteFlow

In NetSuite, account administrators have access to all the information on all record types, including the employee record. This can create issues in the following situations:

- When a user is assigned a role that has permission to create workflows.
- When a user sets a workflow to run as administrator.

A user could write or deploy a workflow that gains access to employee information that they would normally not have access to. This could potentially be used to compromise employee information.

When Advanced Employee Permissions is enabled, carefully track which roles have permission to create or alter workflows. In addition, track which workflows execute as administrator, and what they do to make sure employee information is not unintentionally leaked.

It is not possible to know what fields or sublists are present on any employee record when Advanced Employee Permissions is enabled. This means that workflows cannot safely perform operations, such as setting a default value on a field. To avoid this, utilize an After Submit workflow as administrator, which gives access to the complete set of fields and sublists on the employee record.

If you have any workflows that add buttons to the employee record, make sure that they appear only when appropriate. Configure scripts so that the action being added respects the restrictions on the employee record.

For more information about workflows, see the help topic [Working with Workflows](#).

## Advanced Employee Permissions and SuiteAnalytics Connect

SuiteAnalytics Connect access to the employee record, meaning access through ODBC, JDBC, or ADO.NET drivers, is supported only with the Lists > Employees permission. SuiteAnalytics Connect access is not supported for roles with other employee permissions.

## Advanced Employee Permissions and CSV Import

CSV import is supported only with the Lists > Employees permission.

## Advanced Employee Permissions and SOAP Web Services

Access to the employee record through SOAP web services respects the permissions that are assigned to a role. However, be aware of the following:

- A value for a field is set on the employee record in a SOAP web services program. The current role does not have access to that field. The program completes without errors, but the field is not set or updated.
- Fields and sublists to which the current role does not have access are not returned through search or filtering.

## Advanced Employee Permissions and Customizations

The following section outlines how customizations change when Advanced Employee Permissions is enabled.

### Custom Roles

Custom roles created in your NetSuite account are not automatically updated with the employee permissions introduced by Advanced Employee Permissions. You must manually update custom roles to include any of the required employee permissions. For more information, see the help topic [Setting Employee Access for Advanced Employee Permissions](#).

### Roles Using the SuiteScript Permission

Roles that have the Setup > SuiteScript permission can configure scripts to run as administrator, which bypasses the Advanced Employee Permissions feature. Before creating custom roles with this permission, make sure that the role should have access to the information that is being exposed.

### SuiteBuilder

By default, any customization created with NetSuite SuiteBuilder that are included with the standard Lists > Employees permission are preserved. If you customize the permission, the customizations created with SuiteBuilder are not preserved. If required, you must manually add customizations to the custom Lists > Employees permission. For more information, see [Custom Advanced Employee Permissions](#).

## Advanced Employee Permissions and Standard NetSuite Roles

The following table highlights which Advanced Employee Permissions are automatically assigned to standard NetSuite roles. It also provides the default access levels and restrictions for each. The Employee Administration and Employee Access Tab permissions are not automatically assigned to any standard roles. If required, you can manually add these permissions to a role.

**Warning:** When you assign permissions, be aware that:

- If you change the access level of the Employee Self permission to Edit, employees can make changes to the fields exposed with this permission. This includes their compensation information. You should use the default access level View, however, if required, you can create a custom permission. For more information, see [Custom Advanced Employee Permissions](#).
- If you change the access level of the following permissions to Edit, employees can create employees in NetSuite:
  - Employee Public
  - Employee Confidential
  - Employee Compensation
  - Employee Record Full
  - Employee Administration



**Important:** The standard NetSuite Lists > Employees permission takes precedence over any of the employee permissions in Advanced Employee Permissions. This change is a step in separating the legacy permission model from the Advanced Employee Permissions feature. The Lists > Employees permission gives full-record access to employee records. You should review the standard and custom roles in your account that include the Lists > Employees permission. Ensure that all users with these roles have full access to employee records. Users who should not have full access to employee records should be assigned a role that does not include the Lists > Employees permission. If you have the Administrator role, you can create alternate custom roles for these users. For more information, see [Setting Employee Access for Advanced Employee Permissions](#), [Creating Custom Advanced Employee Permissions](#), and [Custom Restrictions for Advanced Employee Permissions](#).

Standard Role	Employee Permissions	Level of Access	Restriction
A/P Clerk	<b>Employee Public</b>	View	<b>Active and Non-Terminated</b>
	Employee Record	View	–
A/R Clerk	<b>Employee Public</b>	View	<b>Active and Non-Terminated</b>
	Employee Record	View	–
Accountant	<b>Employee Public</b>	View	<b>Active and Non-Terminated</b>
	Employee Record	Full	–
	Employees	Edit	–
Accountant (Reviewer)	<b>Employee Public</b>	View	<b>Active and Non-Terminated</b>
	Employee Record	Full	–
	Employees	View	–
Bookkeeper	<b>Employee Public</b>	View	<b>Active and Non-Terminated</b>
	Employee Record	Full	–
	Employees	Edit	–

<b>Standard Role</b>	<b>Employee Permissions</b>	<b>Level of Access</b>	<b>Restriction</b>
Buyer	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	Full	-
CEO	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	Full	-
	Employees	Full	-
CEO (hands off)	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	Full	-
	Employees	View	-
CFO	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	Full	-
	Employees	Full	-
Chief People Officer (CPO)	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	Full	-
	Employees	Full	-
Employee Center	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	<b>Employee Self</b>	<b>View</b>	<b>Own Only</b>
	<b>Employee Confidential</b>	<b>View</b>	<b>Subordinates</b>
	<b>Employee Compensation</b>	<b>View</b>	<b>Subordinates</b>
	Employee Record	Edit	-
Engineer	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	View	-
Engineering Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	<b>Employee Confidential</b>	<b>View</b>	<b>Subordinates</b>
	<b>Employee Compensation</b>	<b>View</b>	<b>Subordinates</b>
	Employee Record	View	-
Human Resources Generalist	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	Full	-
	Employees	Full	-
Intranet Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	<b>Employee Confidential</b>	<b>View</b>	<b>Subordinates</b>
	<b>Employee Compensation</b>	<b>View</b>	<b>Subordinates</b>
	Employee Record	View	-

<b>Standard Role</b>	<b>Employee Permissions</b>	<b>Level of Access</b>	<b>Restriction</b>
Issue Administrator	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	View	-
Marketing Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	<b>Employee Confidential</b>	<b>View</b>	<b>Subordinates</b>
	<b>Employee Compensation</b>	<b>View</b>	<b>Subordinates</b>
	Employee Record	View	-
Payroll Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	<b>Employee Confidential</b>	<b>View</b>	<b>Subordinates</b>
	<b>Employee Compensation</b>	<b>View</b>	<b>Subordinates</b>
	Employee Record	Full	-
	Employees	Full	-
Payroll Setup	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	Full	-
	Employees	Full	-
PM Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	<b>Employee Confidential</b>	<b>View</b>	<b>Subordinates</b>
	<b>Employee Compensation</b>	<b>View</b>	<b>Subordinates</b>
	Employee Record	View	-
Product Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	View	-
Support Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	<b>Employee Confidential</b>	<b>View</b>	<b>Subordinates</b>
	<b>Employee Compensation</b>	<b>View</b>	<b>Subordinates</b>
	Employee Record	View	-
QA Engineer	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	View	-
QA Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	<b>Employee Confidential</b>	<b>View</b>	<b>Subordinates</b>
	<b>Employee Compensation</b>	<b>View</b>	<b>Subordinates</b>
	Employee Record	View	-
Resource Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	Full	-

<b>Standard Role</b>	<b>Employee Permissions</b>	<b>Level of Access</b>	<b>Restriction</b>
	Employees	View	–
Retail Clerk	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	View	–
Retail Clerk (Web Services Only)	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	Full	–
	Employees	View	–
Sales Administrator	<b>Employee Public</b>	<b>View</b>	–
	Employee Record	Full	–
	Employees	Full	–
Sales Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	<b>Employee Confidential</b>	<b>View</b>	<b>Subordinates</b>
	<b>Employee Compensation</b>	<b>View</b>	<b>Subordinates</b>
	Employee Record	View	–
Sales Person	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	View	–
Sales Vice President	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	View	–
Store Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	<b>Employee Confidential</b>	<b>View</b>	<b>Subordinates</b>
	<b>Employee Compensation</b>	<b>View</b>	<b>Subordinates</b>
	Employee Record	View	–
System Administrator	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	Employee Record	Full	–
	Employees	Full	–
Warehouse Manager	<b>Employee Public</b>	<b>View</b>	<b>Active and Non-Terminated</b>
	<b>Employee Confidential</b>	<b>View</b>	<b>Subordinates</b>
	<b>Employee Compensation</b>	<b>View</b>	<b>Subordinates</b>
	Employee Record	View	–

## Employee Self Permission Overview

The Employee Self permission is intended for all employees. Roles that have this permission can view basic personal information on their employee record. Basic personal information includes things such as home address, and passport information. When you enable the Advanced Employee Permissions feature,

NetSuite automatically assigns this permission to the Employee Center role. By default, the access level for this permission is set to View, and the restriction is set to Own Only, but you can make changes. For more information, see [Setting Employee Access for Advanced Employee Permissions](#).



**Note:** Users are not able to view or edit future or past-dated changes to their employee information if they have an assigned role with this permission.

## Employee Self Permission Fields

This section outlines the default employee record fields that are exposed with the Employee Self permission. If required, you can customize this permission. For more information, see [Custom Advanced Employee Permissions](#).

Employee Self Permission Fields	
<b>Primary Information</b>	
■ Employee ID	
■ Mr/Ms	
■ Name	
■ Initials	
■ Job	
■ Supervisor	
■ Image	
<b>Email   Phone   Address</b>	
■ Email	
■ Phone	
■ Office Phone	
■ Mobile Phone	
■ Home Phone	
■ Fax	
■ Address	
<b>Classification</b>	
■ Subsidiary	
■ Department	
■ Class	
■ Location	

## Employee Self Permission Sublists

This section outlines the default employee record sublists, and the fields associated with them that are exposed with the Employee Self Permission. If required, you can customize this permission. For more information, see [Custom Advanced Employee Permissions](#).

Employee Self Permission Sublists	
<b>Address</b>	
■ Default Shipping	

<b>Employee Self Permission Sublists</b>	
■	Home
■	Label
■	Address
■	Edit
<b>Human Resources</b>	
■	Social Security
■	Birth Date
■	<b>Job Information</b>
□	Job Description
■	<b>Education</b>
□	Level of Education
□	Degree
□	Date Conferred
■	<b>Personal</b>
□	Marital Status
□	Ethnicity
□	Gender
■	<b>Subordinates</b>
Subordinates is a subtab on the Human Resources subtab.	
□	Image
□	Name
□	Job Title
□	Location
□	Department
□	Subsidiary
□	Contact Info
<b>Time-Off</b>	
■	<b>Available Now</b>
□	Type
□	Available this Year
□	Used this Year
□	Schedules this Year
□	Available Now
■	<b>Balances</b>
□	Type
□	Carried Over
□	Accrued
□	Used
□	Expired Carryover
□	Balance
<b>Compensation Tracking</b>	

**Employee Self Permission Sublists**

- Compensation Currency
- Base Wage Type
- Base Wage
- Bonus Target
- Target Type
- Target Frequency
- Target Comments
- Bonus Type\*
- Percentage\*
- Amount\*
- Award Date\*
- Comments\*

\*These fields are a part of the bonus record. The Employee Self Permission allows access to these fields, but Advanced Employee Permissions cannot further restrict access to these fields.

## Employee Public Permission Overview

The Employee Public permission is intended for all employees. Roles that have this permission can view basic employee information. Basic information includes non-sensitive information, such as job title and reporting relationships. When you enable the Advanced Employee Permissions feature, NetSuite automatically assigns this permission to a set of standard roles. By default, the access level for this permission is set to View. The restriction is set to Active and Non-Terminated, but you can make changes. For more information, see [Setting Employee Access for Advanced Employee Permissions](#).

## Employee Public Permission Fields

This section outlines the default employee record fields that are exposed with the Employee Public Permission. If required, you can customize this permission. For more information, see [Custom Advanced Employee Permissions](#).

**Employee Public Permission Fields****Primary Information**

- Employee ID
- Name
- Initials
- Supervisor
- Image

**Email | Phone | Address**

- Email
- Phone
- Office Phone
- Mobile Phone
- Fax

**Classification**

#### Employee Public Permission Fields

- Subsidiary
- Department
- Class
- Location

## Employee Public Permission Sublist

This section outlines the default employee record sublist, and the fields associated with it that are exposed with the Employee Public Permission. If required, you can customize this permission. For more information, see [Custom Advanced Employee Permissions](#)

#### Employee Public Permission Sublist

##### Subordinates

- Image
- Name
- Job Title
- Location
- Department
- Subsidiary
- Contact Info

## Employee Confidential Permission Overview

The Employee Confidential permission is intended for manager roles. In addition to the employee public fields and sublists, roles with this permission can also access confidential employee information. Confidential information includes job and education information. This permission is automatically added to a set of standard roles when the Advanced Employee Permissions feature is enabled. For more information, see [Advanced Employee Permissions and Standard NetSuite Roles](#). By default, the access level for this permission is set to View, and the restriction is set to Subordinates, but you can make changes. For more information, see [Setting Employee Access for Advanced Employee Permissions](#).

## Employee Confidential Permission Fields

This section outlines the default employee record fields that are exposed with the Employee Confidential Permission. If required, you can customize this permission. For more information, see [Custom Advanced Employee Permissions](#).

#### Employee Confidential Permission Fields

##### Primary Information

- Employee ID
- Name
- Initials
- Supervisor
- Job
- Image

## Employee Confidential Permission Fields

### Email | Phone | Address

- Email
- Phone
- Office Phone
- Mobile Phone
- Fax

### Classification

- Subsidiary
- Department
- Class
- Location
- Billing Class

## Employee Confidential Permission Sublists

This section outlines the default employee record sublists, and the fields associated with them that are exposed with the Employee Confidential Permission. If required, you can customize this permission. For more information, see [Custom Advanced Employee Permissions](#).

## Employee Confidential Permission Sublists

### Human Resources

#### ■ Job Information

- Type
- Employee Status
- Job Description
- Sales Rep
- Support Rep
- Project Resource
- Project Manager
- Default Project Resource Role
- Work Calendar
- Labor Cost
- Hourly Rate
- Hire Date
- Last Review Date
- Next Review Date

#### ■ Expenses and Purchasing

- Expense Limit
- Expense Approver
- Expense Approval Limit
- Purchase Limit
- Purchase Approver

<b>Employee Confidential Permission Sublists</b>	
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Purchase Approval Limit</li> <li><input type="checkbox"/> Account</li> </ul>
<b>■ Subordinates</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Image</li> <li><input type="checkbox"/> Name</li> <li><input type="checkbox"/> Job Title</li> <li><input type="checkbox"/> Location</li> <li><input type="checkbox"/> Department</li> <li><input type="checkbox"/> Subsidiary</li> <li><input type="checkbox"/> Contact Info</li> </ul>
<b>■ Education</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Level of Education</li> <li><input type="checkbox"/> Degree</li> <li><input type="checkbox"/> Date Conferred</li> </ul>
<b>Time-Off</b>	<ul style="list-style-type: none"> <li><b>■ Time-Off Plan</b></li> <li><b>■ Start Date for Time-Off Calculations</b></li> <li><b>■ Available Now:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Type</li> <li><input type="checkbox"/> Available this Year (HRS)</li> <li><input type="checkbox"/> Used this Year (HRS)</li> <li><input type="checkbox"/> Scheduled this Year (HRS)</li> <li><input type="checkbox"/> Available Now (HRS)</li> </ul> </li> <li><b>■ Balances:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Type</li> <li><input type="checkbox"/> Carried Over (HRS)</li> <li><input type="checkbox"/> Accrued (HRS)</li> <li><input type="checkbox"/> Used (HRS)</li> <li><input type="checkbox"/> Expired Carryover (HRS)</li> <li><input type="checkbox"/> Balance (HRS)</li> </ul> </li> </ul>
<b>Time Tracking</b>	<ul style="list-style-type: none"> <li><b>■ Time Approver</b></li> </ul>
<b>Commission</b>	<ul style="list-style-type: none"> <li><b>■ Eligible for Commission</b></li> <li><b>■ Pay Commissions Using</b></li> </ul>

## Employee Compensation Permission Overview

The Employee Compensation permission is intended for managers. Roles that have this permission can access compensation information. This permission is automatically added to a set of standard roles when the Advanced Employee Permissions feature is enabled. For more information, see [Advanced Employee](#)

**Permissions and Standard NetSuite Roles.** By default, the access level for this permission is set to View, and the restriction is set to Subordinates, but you can make changes. For more information, see [Setting Employee Access for Advanced Employee Permissions](#).

## Employee Compensation Permission Sublists

This section outlines the default employee record sublists, and the fields associated with them that are exposed with the Employee Compensation Permission. If required, you can customize this permission. For more information, see [Custom Advanced Employee Permissions](#).

<b>Employee Compensation Permission Sublists</b>	
<b>Compensation Tracking</b>	<ul style="list-style-type: none"> <li>■ Base Wage</li> <li>■ Base Wage Type</li> <li>■ Bonus Target</li> <li>■ Target Comments</li> <li>■ Target Frequency</li> <li>■ Target Type</li> <li>■ Compensation Currency</li> <li>■ Bonus Type*</li> <li>■ Percentage*</li> <li>■ Amount*</li> <li>■ Award Date*</li> <li>■ Comments*</li> </ul>
<p>*These fields are a part of the bonus record. The Employee Compensation Permission allows access to these fields, but Advanced Employee Permissions cannot further restrict access to these fields.</p>	
<b>Payroll</b>	
<ul style="list-style-type: none"> <li>■ Compensation Type</li> </ul>	

The following fields are a part of the Compensation Tracking feature:

- Base Wage
- Base Wage Type
- Bonus Target
- Target Comments
- Target Frequency
- Target Type
- Compensation Currency
- Compensation Type

The Compensation Type field is a part of SuitePeople U.S. Payroll. For more information, see [Recording Base Pay Compensation for an Employee](#) and [Including an Employee in Payroll](#).

## Employee Access Tab Permission Overview

The Employee Access Tab permission is intended for IT administrators. Roles with this permission give users access to NetSuite and assign roles to users who fall into the restriction policy defined on the Role

page. For example, when restricted by location, a role with this permission can give access and assign roles to employees in their location only.

**Note:** When the Advanced Employee Permissions feature is enabled, the Employee Access Tab permission is not automatically assigned to any standard roles.

## Employee Access Tab Permission Fields

This section outlines the default employee record fields that are exposed with the Employee Access Tab Permission. If required, you can customize this permission. For more information, see [Custom Advanced Employee Permissions](#).

Employee Access Tab Permission Fields	
<b>Primary Information</b>	
■	Employee ID
■	Name
<b>Email   Phone   Address</b>	
■	Email

## Employee Access Tab Permission Sublist

This section outlines the default employee record sublist, and the fields associated with this permission that are exposed with the Employee Access Tab Permission. If required, you can customize this permission. For more information, see [Custom Advanced Employee Permissions](#).

Employee Access Tab Permission Sublist	
<b>Access</b>	
■	Give Access
■	IP Address Restriction
■	Inherit IP Rules from Company
Roles:	
■	Role
Global Permissions:	
■	Permission
■	Level
History:	
■	Date/Time
■	User
■	Change

## Employee Administration Permission Overview

The Employee Administration permission is intended for Human Resources Generalists and Human Resources Administrators. Users with this permission have access to the Employee Public fields and

sublists. They also have access to a limited set of fields and sublists, based on the restrictions defined on the Role page.



**Note:** When the Advanced Employee Permissions feature is enabled, the Employee Administration permission is not automatically assigned to any standard roles.

## Employee Administration Permission Fields

This section outlines the default employee record fields that are exposed with the Employee Administration Permission. If required, you can customize this permission. For more information, see [Custom Advanced Employee Permissions](#).

Employee Administration Permission Fields	
<b>Primary Information</b>	
■ Employee ID	
■ Initials	
■ Supervisor	
■ Mr/Ms	
■ Job	
■ Image	
■ Name	
<b>Email   Phone   Address</b>	
■ Email	
■ Mobile Phone	
■ Address	
■ Phone	
■ Home Phone	
■ Office Phone	
■ Fax	
<b>Classification</b>	
■ Subsidiary	
■ Class	
■ Location	
■ Department	

## Employee Administration Permission Sublists

This section outlines the default employee record sublists, and the fields associated with them that are exposed with the Employee Administration Permission. If required, you can customize this permission. For more information, see [Custom Advanced Employee Permissions](#).

Employee Administration Permission Sublists	
<b>Address</b>	
■ Default Shipping	
■ Home	

**Employee Administration Permission Sublists**

- Label
- Address
- Edit

**Human Resources**

- Birth Date
- Job Information:
  - Type
  - Termination/Release Date
  - Employee Status
  - Job Description
  - Work Calendar
  - Hire Date
  - Last Review Date
  - Next Review Date
  - Expense and Purchasing:
    - Expense Limit
    - Expense Approver
    - Expense Approval Limit
    - Purchase Limit
    - Purchase Approver
    - Purchase Approval Limit
    - Account
    - Default Account for Corporate Card Expenses
  - Subordinates:
    - Image
    - Name
    - Job Title
    - Location
    - Department
    - Subsidiary
    - Contact Info
  - Education:
    - Level of Education
    - Degree
    - Date Conferred
  - Personal:
    - Marital Status
    - Ethnicity
    - Gender

# Employee Record Full Permission Overview

The Employee Record Full permission is intended for Human Resources Business Partners, Chief People Officers (CPOs), and Human Resources Directors. Users with this permission have access to all information about the employee record, except for fields and sublists exposed by the Employee Access Tab permission. Roles with this permission can give users access to NetSuite. They can also assign roles to users who fall into the restriction policy defined on the Role page. For more information, see [Employee Access Tab Permission Overview](#).

## Advanced Employee Permissions Use Cases

The following section provides five use cases illustrating how to use Advanced Employee Permissions. These are examples only. They are meant to illustrate how using a combination of permissions exposes only the information that a particular type of employee requires access to.

For a complete list of the fields and sublists exposed with each advanced employee permission, see the following help topics:

- [Employee Self Permission Overview](#)
- [Employee Public Permission Overview](#)
- [Employee Confidential Permission Overview](#)
- [Employee Compensation Permission Overview](#)
- [Employee Access Tab Permission Overview](#)
- [Employee Administration Permission Overview](#)
- [Employee Record Full Permission Overview](#)



**Note:** These examples use the default Advanced Employee Permissions and the default restrictions, but you can customize both. For more information, see [Custom Advanced Employee Permissions](#) and [Custom Restrictions for Advanced Employee Permissions](#).

## Use Case 1: Employee Access for All Employees

The following table provides the permissions, access levels, and restrictions required to give employees access to basic employee information about other employees. It also provides relevant information about themselves.



**Important:** The Lists > Employee Record and Lists > Perform Search permissions are standard NetSuite permissions, and are not part of Advanced Employee Permissions. However, these permissions are required to access employee menus in NetSuite and to be able to perform searches. For more information about the standard permissions, see the help topic [NetSuite Permissions Overview](#).

Permission	Access Level	Restriction	Gives Employees Access To
Lists > Employee Record	Edit	-	Ability to see NetSuite menus related to employees. For example, List > Employees. This permission does not give access to the employee record.

Permission	Access Level	Restriction	Gives Employees Access To
Lists > Perform Search	Full	-	Search for employees.
Employee Public	View	Active and Non-Terminated	View and search basic employee information, such as email address and supervisor, for all active, non-terminated employees.
Employee Self	View	Own Only	View relevant information about themselves on their employee record, such as job description and compensation.

## Use Case 2: Employee Access for Managers

The following table gives an example of how to use Advanced Employee Permissions to give the required access to employee information for a manager.



**Important:** The Lists > Employee Record and Lists > Perform Search permissions are standard NetSuite permissions, and are not part of Advanced Employee Permissions. However, these permissions are required to access employee menus in NetSuite and to be able to perform searches. For more information about the standard permissions, see the help topic [NetSuite Permissions Overview](#).

Permission	Access Level	Restriction	Gives Managers Access To
Lists > Employee Record	View	-	Ability to see NetSuite menus related to employees. For example, List > Employees. This permission does not give access to the employee record.
Lists > Perform Search	Full	-	Search for employees.
Employee Confidential	View	Subordinates	View and search confidential employee information, such as hire date and expense limit, for direct reports and below.
Employee Compensation	View	Subordinates	View and search compensation information for direct reports and below.
Employee Public	View	Active and Non-Terminated	View and search basic employee information, such as email address and supervisor, for all active, non-terminated employees.
Employee Self	View	Own Only	View relevant information about themselves on their employee record, such as job description and address.

## Use Case 3: Employee Access for Human Resources Generalists

The following table gives an example of how to use Advanced Employee Permissions to give required access to employee information for a Human Resources Generalist.



**Important:** The Lists > Employee Record and Lists > Perform Search permissions are standard NetSuite permissions, and are not part of Advanced Employee Permissions. However, these permissions are required to access employee menus in NetSuite and to be able to perform searches. For more information about the standard permissions, see the help topic [NetSuite Permissions Overview](#).

Permission	Access Level	Restriction	Gives Human Resources Generalists Access To
Lists > Employee Record	Full	-	Ability to see NetSuite menus related to employees. For example, List > Employees. This permission does not give access to the employee record.
Lists > Perform Search	Full	-	Search for employees.
Employee Administration	Full	Inherit from Role	View, create, edit, and search for personal information, such as home phone, for employees who match the restrictions defined on the Role page. If no restrictions are defined, this information is available for all employees.
Employee Confidential	View	Subordinates	View and search confidential employee information, such as hire date and expense limit, for direct reports and below.
Employee Compensation	View	Subordinates	View compensation information for direct reports and below.
Employee Public	View	Active and Non-Terminated	View and search basic employee information, such as email address and supervisor, for all active, non-terminated employees.

## Use Case 4: Employee Access for Human Resources Directors

The following table gives an example of how to use Advanced Employee Permissions to give required access to employee information for a Human Resources Director.



**Important:** The Lists > Employee Record and Lists > Perform Search permissions are standard NetSuite permissions, and are not part of Advanced Employee Permissions. However, these permissions are required to access employee menus in NetSuite and to be able to perform searches. For more information about the standard permissions, see the help topic [NetSuite Permissions Overview](#).

Permission	Access Level	Restriction	Gives Human Resources Directors and Above Access To
Lists > Employee Record*	Full	-	Ability to see NetSuite menus related to employees. For example, List > Employees. This permission does not give access to the employee record.
Lists > Perform Search*	Full	-	Search for employees.

Permission	Access Level	Restriction	Gives Human Resources Directors and Above Access To
Employee Record Full	Full	Inherit from Role	View, create, edit, and search all employee record information for employees who match the restrictions defined on the Role page. If no restrictions are defined, this information is available for all employees.
Employee Public	View	Active and Non-Terminated	View and search basic employee information, such as email address and supervisor, for all active, non-terminated employees.

## Use Case 5: Employee Access for IT Administrators

The following table gives an example of how to use Advanced Employee Permissions to give the required access to employee information for an IT administrator.



**Important:** The Lists > Employee Record and Lists > Perform Search permissions are standard NetSuite permissions, and are not part of Advanced Employee Permissions. However, these permissions are required to access employee menus in NetSuite and to be able to perform searches. For more information about the standard permissions, see the help topic [NetSuite Permissions Overview](#).

Permission	Access Level	Restriction	Gives IT Administrators Access To
Lists > Employee Record	View	-	Ability to see NetSuite menus related to employees. For example, List > Employees. This permission does not give access to the employee record.
Lists > Perform Search	Full	-	Search for employees.
Employee Access Tab	Full	Inherit from Role	Give access and assign roles to employees who match the restrictions defined on the Role page.
Employee Public	View	Active and Non-Terminated	View and search basic employee information, such as email address and supervisor, for all active, non-terminated employees.

## Setting Employee Access for Advanced Employee Permissions

You can specify additional levels of restrictions and access to employee information on the **Employee Access** subtab of the Role page.

### To set employee access:

1. Go to Setup > Users/Roles > Manage Roles.
2. From the Manage Roles list page, you can either create a custom or new role that you want to customize employee access for:
  - To create a custom role, click **Customize** or **Edit** beside the role. All of the permissions associated with the parent role are inherited. You can make changes as necessary.



**Important:** The Lists > Employees permission takes precedence over any of the employee permissions that are part of the Advanced Employee Permissions feature. This change is a step in separating the legacy permission model from the Advanced Employee Permissions feature. The Lists > Employees permission gives full-record access to employee records. When customizing a role, check if this permission is present. If this role should not have full access to employee records, remove the permission.

- To create a new role that does not contain a list of associated permissions, click **New Role**.



**Important:** When creating a new role using Advanced Employee Permissions you must add the Lists > Employee Record permission to the role. This permission is required to see NetSuite menus related to employees. For example, List > Employees.

3. Click the **Employee Access** subtab.
4. From the **Permission** list, select the employee access you want to add to the role. Select from the following:
  - **Employee Administration** – This permission is intended for Human Resources Generalists and Human Resources Administrators. Users assigned to a role with this permission have access to HR-related fields on the employee record. For more information, see [Employee Administration Permission Overview](#).
  - **Employee Compensation** – This permission is intended for managers. Users assigned to a role with this permission have access to compensation information on the employee record. For more information, see [Employee Compensation Permission Overview](#).
  - **Employee Confidential** – This permission is intended for managers. Users assigned to a role with this permission have access to public and confidential information on the employee record. For more information, see [Employee Confidential Permission Overview](#).
  - **Employee Public** – This permission is intended for employees. Users assigned to a role with this permission have access to basic employee information on the employee record. For more information, see [Employee Public Permission Overview](#).
  - **Employee Record Full** – This permission is intended for Human Resources Business Partners, Chief People Officers (CPOs), and Human Resources Directors. Users assigned to a role with this permission have access to all information on the employee record. For more information, see [Employee Record Full Permission Overview](#).
  - **Employee Self** – This permission is intended for employees. Users assigned to a role with this permission have access to basic personal information on the employee record. For more information, see [Employee Self Permission Overview](#).
  - **Employee Access Tab** – This permission is intended for IT Administrators. Users assigned to a role with this permission can give access and assign roles to employees. For more information, see [Employee Access Tab Permission Overview](#).



**Note:** When you select a permission, the default access level and restriction are applied, but you can change these.

5. If required, change the access level for the selected restriction from the **Level** list. For more information, see the help topic [Access Levels for Permissions](#).



**Note:** When two employee permissions, one at level View and another at level Edit, are included with a role, note the following. Users assigned to the role see a combination of the fields and sublists they are permitted to view on the employee record. In edit mode, only the fields and sublists that the user can edit are visible on the employee record.



**Warning:** When you assign permissions, be aware that:

- If you change the access level of the Employee Self permission to Edit, employees can make changes to the fields exposed with this permission. This includes their compensation information. You should use the default access level View, however, if required, you can create a custom permission. For more information, see [Custom Advanced Employee Permissions](#).
- If you change the access level of the following permissions to Edit, users can create employees in NetSuite:
  - Employee Public
  - Employee Confidential
  - Employee Compensation
  - Employee Administration
- The Employee Record Full permission gives roles access to all information on the employee record. This permission is intended for Human Resources Business Partners, Chief People Officers (CPO), and Human Resources Directors. To restrict these roles to see only employee administration information, remove the Employee Record Full permission, and add the Employee Administration permission. For more information, see [Employee Administration Permission Overview](#).

6. If required, from the **Restrictions** list, select a new restriction level. Select from the following:
  - **Active and Non-Terminated** – Select this when you want to restrict the permission to active and non-terminated employees. For example, you could add this restriction to the Employee Public permission. Then, users assigned to this role would have access to basic employee information for all active and non-terminated employees only.
  - **Inherit from Role** – Select this when you want the permission to inherit the restrictions set on the Role page. For more information about setting restrictions on the Role page, see the help topic [Customizing or Creating NetSuite Roles](#).
  - **Own Only** – Select this when you want to restrict the permission to the employee's own record only. Users assigned to this role have access to the fields and sublists exposed with the permission for only themselves. For example, you could add this restriction to the Employee Self permission. Then, users assigned to this role would have access only to basic personal employee information for themselves.
  - **Subordinates** – Select this when you want to restrict the permission by subordinates. For example, you could add this restriction to the Employee Confidential permission. Then, users assigned to this role would have access to public and confidential employee information only for their subordinates.



**Note:** You can also create custom restrictions. For more information, see [Custom Restrictions for Advanced Employee Permissions](#).

7. Click **Add**.
8. Repeat steps 4 to 7 for each permission you want to assign to the role.
9. To finish, click **Save**.



**Note:** If you change access to a role that a user currently logged in to NetSuite is using, note the following. That user must log out and log back in to see the newly-assigned access.

## Custom Advanced Employee Permissions

This section describes how to create custom Advanced Employee Permissions.

For more information, see the following topics:

- [Before Creating Custom Advanced Employee Permissions](#)
- [Prerequisites for Creating Custom Advanced Employee Permissions](#)
- [Creating Custom Advanced Employee Permissions](#)
- [Adding Standard Fields to Custom Advanced Employee Permissions](#)
- [Adding Standard Sublists to Custom Advanced Employee Permissions](#)

## Before Creating Custom Advanced Employee Permissions

Both inline editing and inactivating employees from the Employees List page are disabled for users assigned to a role that has a custom employee permission.

Before deploying client or server side scripts that gain access to employee information, make sure:

- The employee field or sublist is available to the role.
- The role has the correct employee permission to see the employee field or sublist for the types of employees being viewed or edited.
- Some scripts may fail, including third-party scripts. Scripts fail when they attempt to access parts of the employee record they are not permitted to access with the assigned role and permissions.

For more information, see [Before Enabling the Advanced Employee Permissions Feature](#).

## Prerequisites for Creating Custom Advanced Employee Permissions

To create custom Advanced Employee Permissions, you need the Setup > Manage Custom Permissions permission at access Level Full. The standard role that comes with this permission is the Administrator role. You can also create custom roles that include this permission. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

## Creating Custom Advanced Employee Permissions

You have two choices when creating custom Advanced Employee Permissions:

- You can create a new permission using a custom set of fields and sublists from the employee record.
- You can customize a standard employee permission to include a subset of the fields and sublists that are exposed. You can also customize it to include additional fields and sublists.

Standard employee permissions cannot be modified. Use these permissions as templates to create your own custom employee permissions.



**Important:** Some fields on the employee record have dependencies on other fields. Do not add or remove these fields individually. For example, you customize the Employee Access Tab permission. But you have only a partial set of the standard fields that come with this permission. Therefore, the employee record cannot load. The employee record only loads when it has either all or none of the access fields.

### To create custom Advanced Employee Permissions:

1. Go to Setup > Users/Roles > Manage Permissions.
2. From the Manage Permissions page, you can either create a custom or new employee permission.
  - To create a custom employee permission, click **Customize** beside the employee permission you want to customize. All of the standard fields and sublists associated with the parent permission are inherited. You can make changes as necessary.
  - To create a new employee permission that does not start with a list of associated fields and sublists, click **New Permission** page.
3. If required, you can add standard and custom fields to the permission. For more information, see the following help topics:
  - [Adding Standard Fields to Custom Advanced Employee Permissions](#)
  - [Adding Standard Sublists to Custom Advanced Employee Permissions](#)
  - [Creating Custom Fields for Advanced Employee Permissions](#)
  - [Adding Custom Fields to Advanced Employee Permission](#)
  - [Creating Custom Sublists for Advanced Employee Permissions](#)
  - [Adding Custom Sublists to Advanced Employee Permission](#)
4. To finish, click **Save**.



**Tip:** To remove the permission, from the **Actions** list, select **Delete**. When the permission is assigned to a role you need to remove it from the role before you can delete it.

## Adding Standard Fields to Custom Advanced Employee Permissions

When you create a custom Advanced Employee Permissions you can include all or a set of standard employee record fields to the permission.

### To add standard fields to custom Advanced Employee Permissions:

1. Go to Setup > Users/Roles > Manage Permissions.

2. From the Manage Permissions page, click **Customize** beside the employee permission you want to customize. All of the standard fields and sublists associated with the parent permission are inherited. You can make changes as necessary.
3. To add a standard field, select the **Fields** subtab, and then the **Standard Fields** subtab.
4. Click a line in the list.
5. From the **Record Type** list, select **Employee**.
6. From the **Field** list, select the field to add to the permission.
7. Click **Add**.
8. Repeat steps 4 to 7 for each field you want to include.
9. To finish, click **Save**.

## Adding Standard Sublists to Custom Advanced Employee Permissions

When you create a custom Advanced Employee Permissions you can include all or a set of standard employee record sublists to the permission.



**Important:** When you add a sublist to a custom permission that is associated with another feature in NetSuite, note the following. You must also add the specific permission for the feature to the role. If the role does not have the required permission for the feature, users do not see any information in the sublist. For example, the Accrued Time and Available Now sublists are associated with the Time-Off Management feature. If you add these sublists to a custom Advanced Employee Permission, ensure that the Time-Off Administration permission is included. For more information, see [SuitePeople Permission Requirements](#) and [Permissions Documentation](#).

### To add standard sublists to custom Advanced Employee Permissions:

1. Go to Setup > Users/Roles > Manage Permissions.
2. From the Manage Permissions page, click **Customize** beside the employee permission you want to customize. All of the standard fields and sublists associated with the parent permission are inherited. You can make changes as necessary.
3. To add a standard sublist, select the **Sublists** subtab, and then the **Standard Sublists** subtab.
4. Click a line in the list.
5. From the **Record Type** list, select **Employee**.
6. From the **Sublist** list, select the sublist to add to the permission.
7. Click **Add**.
8. Repeat steps 4 to 7 for each sublist you want to include.
9. To finish, click **Save**.

## Creating Custom Fields for Advanced Employee Permissions

You can create custom employee fields, which you can then add to custom Advanced Employee Permissions.



**Important:** When an Advanced Employee Permission is assigned to a role, the permission access level is set on the Role page. Not on the custom entity record. For example, an Advanced Employee Permission is assigned to a role at access level View. Any custom fields that are added to the permission respect that access level.

### To create custom fields for Advanced Employee Permissions:

1. Go to Customization > Lists, Records, & Fields > Entity Fields > New.
2. In the **Label** field, enter a name or description for the custom field. You can enter up to 200 characters for the label.
3. On the **Applies To** subtab, check the **Employee** box.
4. Click the **Employee Access** subtab.
5. Click a line in the list.
6. From the **Permission** list, select the custom permission with which you want to associate this custom field. This list displays each of the custom Advanced Employee Permissions that have been created.
7. Click **Add**. Alternatively, click **+Insert**, select the permission, and click **Add**.



**Tip:** To remove a permission, select it from the list, and click **Remove**.

8. Repeat steps 5 to 7 for each custom permission you want to associate this custom field with.
9. To finish, click **Save**.

The custom field is automatically added to the custom permission. To see a list of the custom fields associated with a permission, click the **Fields** subtab. Then, click the **Custom Fields** subtab on the Permission page.



**Note:** The Show In List box on the custom entity field record is not supported with Advanced Employee Permissions. This means that custom fields are not shown on the Employees List page when this box is checked. To display custom fields with Advanced Employee Permissions, you need to create a custom view that contains the custom fields. To do this, click Edit from the Employees List page and manually add the custom fields.

## Adding Custom Fields to Advanced Employee Permission

Use the following procedure to add custom fields to the Advanced Employee Permission.

### To add custom fields to the Advanced Employee Permissions:

1. Go to Setup > Users/Roles > Manage Permissions.
2. Click **Customize** or **Edit** beside the permission to which you want to add a custom sublist to.
3. Select the **Fields** subtab.
4. Select the **Custom Fields** subtab.
5. Click a line in the list.
6. From the **Record Type** list, select **Employee**.
7. From the **Field** list, select the custom field to add to the permission.
8. Click **Add**. Alternatively, click **+Insert**, select the record type and sublist, and click **Add**.

9. Repeat steps 5 to 8 for each custom field you want to add to the permission.
10. To finish, click **Save**.

## Creating Custom Sublists for Advanced Employee Permissions

You can create a custom employee sublist, which you can then add to Advanced Employee Permissions.



**Important:** When an Advanced Employee Permission is assigned to a role, the permission access level is set on the Role page. Not on the custom entity record. For example, an Advanced Employee Permission is assigned to a role at access level View. Any custom fields that are added to the permission respect that access level.

### To create custom sublists for Advanced Employee Permissions:

1. Go to Customization > Forms > Sublists > New.
2. From the **Type** list, select **Entity**.
3. Check the **Employee** box.
4. From the **Search** list, select the saved search that returns the results you want to appear on the record. If the saved search does not appear in the list, check the saved search settings. The first item listed on the **Available Filters** subtab must be a List/Record type. Otherwise, the saved search is not available to assign as a sublist. For more information, see the help topic [Saved Searches for Custom Sublists](#).
5. In the **Label** field, enter a label for this sublist.
6. From the **Tab** list, select the subtab under which you want the sublist to appear.
7. Repeat these steps for each custom sublist you want to create.
8. To finish, click **Save**.

The custom sublist you created automatically appears in the **Custom Sublists** subtab on the Permission page. For more information, see [Adding Custom Sublists to Advanced Employee Permission](#).

## Adding Custom Sublists to Advanced Employee Permission

Use the following procedure to add custom sublists to Advanced Employee Permission.

### To add custom sublists to Advanced Employee Permissions:

1. Go to Setup > Users/Roles > Manage Permissions.
2. Click **Customize** or **Edit** beside the permission to which you want to add a custom sublist to.
3. Select the **Sublists** subtab.
4. Select the **Custom Sublists** subtab.
5. Click a line in the list.
6. From the **Record Type** list, select **Employee**.
7. From the **Sublist** list, select the custom sublist to add to the permission.
8. Click **Add**. Alternatively, click **+Insert**, select the record type and sublist, and click **Add**.

9. Repeat steps 5 to 8 for each custom sublist you want to add to the permission.
10. To finish, click **Save**.

## Custom Restrictions for Advanced Employee Permissions

By default, when Advanced Employee Permissions is enabled there are four pre-defined restrictions. This includes, Own Only, Active and Non-Terminated, Subordinates, and Inherit from Role. This section describes how to create custom restrictions for Advanced Employee Permissions and how to assign custom restrictions to a role.

For more information, see the following topics:

- [Prerequisites for Creating Custom Restrictions for Advanced Employee Permissions](#)
- [Creating Custom Restrictions for Advanced Employee Permissions](#)
- [Assigning Custom Restrictions to Advanced Employee Permissions](#)

### Prerequisites for Creating Custom Restrictions for Advanced Employee Permissions

To create custom restrictions for Advanced Employee Permissions, the Setup > Manage Custom Restrictions Permission is required at access Level Full. The standard role that comes with this permission is the Administrator role. You can also create custom roles that include this permission. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

### Creating Custom Restrictions for Advanced Employee Permissions

You can create custom restrictions to restrict the instances that a role has access to the employee record by class, department, location, and subsidiary. For example, you may have a Human Resources department that is physically located in one location, but who support staff located in a different location. You can create custom Advanced Employee Permissions' restrictions to give this department access to sensitive employee data for the staff they support. You can limit them to less sensitive information for the employees in their location that they do not support.

**Note:** You cannot make changes to the standard restrictions that come with the Advanced Employee Permissions feature. This includes: Active and Non-Terminated, Inherit from Role, Own Only, and Subordinates.

#### To create custom restrictions for Advanced Employee Permissions:

1. Go to Setup > Users/Roles > Manage Restrictions > New.
2. In the **Name** field, enter a unique name for the restriction. The name entered here appears on the Role page, under the **Employee Access** subtab, in the **Restrictions** list.
3. If required, enter a description for the restriction.
4. In the **Class** list, select the classes that you want to include with the restriction. The classes selected from this list determine the classes this restriction is limited to. This means that roles that have

a permission with this restriction can only access employee information for employees in the selected classes. Hold down the Ctrl key to select multiple classes or to deselect a class from the list.

5. From the **Department** list, select the departments that you want to include with the restriction. The departments selected from this list determine the departments this restriction is limited to. This means that roles that have a permission with this restriction can only access employee information in the selected departments. Hold down the Ctrl key to select the multiple departments or to deselect a location from the list.
6. From the **Locations** list, select the locations that you want to include with the restriction. The locations selected from this list determine the locations this restriction is limited to. This means that roles that have a permission with this restriction can only access employee information for employees in the selected locations. Hold down the Ctrl key to select multiple locations or to deselect a location from the list.
7. From the **Subsidiaries** list, select the subsidiaries that you want to include with the restriction. The subsidiaries selected from this list determine the subsidiaries this restriction is limited to. This means that roles that have a permission with this restriction can only access employee information for employees in the selected subsidiaries. Hold down the Ctrl key to select multiple subsidiaries or to deselect a subsidiary from the list.
8. Click **Save**.

 **Tip:** To remove the restriction, from the **Actions** list, select **Delete**. When the restriction is assigned to a role you need to remove it from the role before you can delete it.

## Assigning Custom Restrictions to Advanced Employee Permissions

You can assign a custom restriction to Advanced Employee Permissions on the Role page.

### To assign a custom restriction:

1. Go to Setup > Users/Roles > Manage Roles.
2. From the list, click **Customize** or **Edit** beside the role to which you want to assign the custom restriction to.
3. Select the **Employee Access** subtab.
4. From the **Permission** list, select the permission you want to add to the role. Select from the following:
  - **Employee Administration** – This permission is intended for Human Resources Generalists and Human Resources Administrators. Users assigned to a role with this permission have access to HR-related fields on the employee record. For more information, see [Employee Administration Permission Overview](#).
  - **Employee Compensation** – This permission is intended for managers. Users assigned to a role with this permission have access to compensation information on the employee record. For more information, see [Employee Compensation Permission Overview](#).
  - **Employee Confidential** – This permission is intended for managers. Users assigned to a role with this permission have access to public and confidential information on the employee record. For more information, see [Employee Confidential Permission Overview](#).
  - **Employee Public** – This permission is intended for employees. Users assigned to a role with this permission have access to basic employee information on the employee record. For more information, see [Employee Public Permission Overview](#).

- **Employee Record Full** – This permission is intended for Human Resources Business Partners, Chief People Officers (CPOs), and Human Resources Directors. Users assigned to a role with this permission have access to all information on the employee record. For more information, see [Employee Record Full Permission Overview](#).
  - **Employee Self** – This permission is intended for employees. Users assigned to a role with this permission have access to basic personal information on the employee record. For more information, see [Employee Self Permission Overview](#).
  - **Employee Access Tab** – This permission is intended for IT Administrators. Users assigned to a role with this permission can give access and assign roles to employees. For more information, see [Employee Access Tab Permission Overview](#).
5. If required, change the access level for the selected restriction from the **Level** list. For more information, see [Setting Employee Access for Advanced Employee Permissions](#).
  6. From the **Restrictions** list, select the custom restriction to apply to the permission.
  7. Click **Add**.
  8. Repeat steps 4 to 7 for each custom restriction you want to assign to the role.
  9. To finish, click **Save**.



**Note:** If you add a custom restriction to a role that a user who is currently logged in to NetSuite is using, note the following. That user must log out and log back in to see the newly-assigned restriction.

# Time Tracking

- [Managing Time Tracking](#)
- [Timesheets](#)

## Managing Time Tracking

A user with the Enable Features permission can enable the Time Tracking feature at Setup > Company > Enable Features, on the Employees subtab. This feature enables employees with access to time tracking to record the hours they work.

 **Note:** If you currently use the Timesheets feature, see [Timesheets](#) for additional information.

If you are migrating your time features from Timesheets to Time Tracking, the conversion process can take some time depending on the number of time entries and customizations to be converted. When enabling Time Tracking from Timesheets, administrators will receive an email notification that the process has begun. The message will include a link to a status page that details the progress of the migration.

Users of products other than NetSuite CRM+ can record time for payroll items and billable time. Recording billable time enables the invoicing of customers for these hours.

 **Tip:** Billable is unchecked by default. When you select an employee and a customer, billable becomes checked, and you can uncheck it.

 **Warning:** NetSuite CRM+ users cannot record billable time, invoice customers for billable time, or record time for payroll items.

For information about time tracking, see the following:

- [Understanding Time Tracking](#)
- [Setting Up Time Tracking Preferences](#)
- [Giving an Employee Access to Time Tracking](#)
- [Entering a Time Transaction](#)
- [Weekly Time Tracking](#)
- [Using the Timer to Track Time](#)
- [Calculating Total Time Worked](#)
- [Entering Time for a Payroll Item](#)
- [Custom Fields in Time Tracking Pages](#)
- [Approving or Rejecting a Time Transaction](#)

## Understanding Time Tracking

Use time tracking to record the hours worked by employees.

You can record billable hours and invoice your customers for them. If you use Projects or Project Management, you can also record how many hours are spent on each project and use time reports to plan for future projects and hiring needs. For more information on Time Tracking and Projects, see the help topic [Using Project Management , Working with Resources in Project Management](#), and [Managing Time and Expenses for Project Resources](#).

With the appropriate role access, you can track time for employee payroll items like hourly wages. Employees who have the Restrict Time and Expenses box checked and the Track Time permission enabled can enter time for themselves using their default roles. This eliminates the need for them to change to the Employee Center role to track their time. For more information, see the topics under [NetSuite Users & Roles](#).



**Warning:** NetSuite CRM+ users cannot record billable time, invoice customers for billable time, or record time for payroll items.

If your role has the Track Time permission, customer records include a Time Tracking subtab that shows associated time records and enables you to enter new ones. If you use Projects or Project Management, project records also include a Time Tracking subtab.

A user with the Enable Features permission must enable the Time Tracking feature at Setup > Company > Enable Features, on the Employees subtab.

To set preferences for tracking time, go to Setup > Accounting > Preferences > Accounting Preferences and click the Time & Expenses subtab. For more information, see [Setting Up Time Tracking Preferences](#).



**Note:** If you use NetSuite OneWorld, the **Intercompany Time and Expense** feature and the related **Intercompany Time** accounting preference affect users' ability to enter time worked for customers or projects with subsidiaries other than their own. If the feature is not enabled, or if the preference is set to **Disallow**, users cannot enter intercompany time transactions. Instead, they can only select customers or projects with the same subsidiary to which they are assigned. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

## Time Thresholds

You can set time thresholds to limit how employees and vendors enter time. Time threshold preferences enable you to specify the minimum and maximum number of hours permitted per day and week. You can set one or all of these preferences to limit the number of hours permitted to be tracked on a weekly basis. You can opt to set the limits manually, or you can have the limits set automatically based on the work calendar. You can also choose to permit time transactions to be submitted outside the limits you set. You can choose whether or not to apply your time thresholds to vendor time.



**Note:** Time thresholds are not available when using SuiteScript, SuiteFlow, or custom approval routing.

Daily time threshold preferences account for holidays and non-working days based on the selected work calendar. NetSuite does not verify non-working days, holidays, or entries on a timesheet that have not yet been filled.

For employees without a selected work calendar, time thresholds use the system default work calendar to determine holidays and non-working days. Zero time entries are considered filled entries and are verified according to set limits. Regardless of work calendars, employees can still track time on non-working days and holidays and time threshold limits are applied accordingly.

If you also use advanced approvals, you can choose to require that a time entry be entered for each working day.



**Important:** NetSuite validates set time thresholds within the browser. When an entry is made for the duration of a time transaction, NetSuite validates that the entry fits within the set limits. If an entry is left blank, NetSuite will not validate for that entry. This can create a situation where time transactions are saved that do not meet set threshold limits.

If you use Weekly Timesheets, thresholds are validated on both individual time entries and each timesheet. It is possible for a single time entry to satisfy a daily limit but violate a weekly limit. In this

situation the time entry would generate a warning because of the timesheet the entry is a part of. You can choose to allow time to be submitted after warnings are displayed.

Time thresholds are checked upon submission of the time entries. You can also choose to have the time entries validated again when they are approved.

To set time thresholds, go to Setup > Accounting > Accounting Preferences and make selections for time thresholds at the bottom of the Time Tracking section.

For more information about time thresholds, see the help topic [Time & Expenses Accounting Preferences](#).

## Enabling Time Tracking for CRM

With Time Tracking for CRM, users can track time on tasks, phone calls, events and cases. Tracking time on these activities can help you manage your company by being aware of how much time is spent on certain activities.



**Important:** The Time Tracking feature and the associated permissions are required to use Time Tracking for CRM.

An administrator must enable the feature before users can track time.

### To enable Time Tracking for CRM:

1. Go to Setup > Company > Enable Features
2. Click the **Employees** subtab, and check the **Time Tracking for CRM** box.
3. Click **Save**.



**Important:** If you also use the Projects feature and want to track time for customers, you must disable the **Show Projects Only for Time and Expense Entry** preference located on the Time & Expenses subtab at Setup > Accounting > Accounting Preferences. When this preference is enabled, time can only be tracked for CRM Tasks associated with a project record.

## Enabling Weekly Timesheets

The Weekly Timesheets feature works in conjunction with the existing Time Tracking feature to offer a customizable method of capturing time entries in a weekly format.



**Important:** The Time Tracking feature and the associated permissions are required to use Weekly Timesheets.

An administrator must enable the feature before users can track time using the weekly timesheet.

### To enable Weekly Timesheets:

1. Go to Setup > Company > Enable Features
2. Click the **Employees** subtab, and check the **Weekly Timesheets** box.
3. Click **Save**.



**Note:** Weekly Timesheets is an additional feature that offers a customizable method for entering time on a weekly basis. The Time Tracking feature includes a Weekly Time Tracking page which can be used to track time on a weekly basis without any additional customizations. If enabled, Weekly Timesheets will take the place of the included Weekly Time Tracking.

For more information on using weekly timesheets, see [Weekly Timesheets](#).

## Setting Up Time Tracking Preferences

Time tracking lets you track the hours you and other employees work. You can record billable hours and invoice your customers for them.



**Tip:** Billable is unchecked by default. When you select an employee and a customer, billable becomes checked, and you can uncheck it.



**Warning:** NetSuite CRM+ users cannot record billable time, invoice customers for billable time, or record time for payroll items.

Set time tracking preferences to determine how you process time that you track.



**Note:** Preferences that appear vary depending on the features you have enabled. If you use NetSuite OneWorld and the **Intercompany Time and Expense** feature is enabled in your account, review the **Intercompany Time** preference available on the **General** subtab of the Accounting Preferences page. This preference indicates whether users can enter time transactions for customers and projects with subsidiaries other than their own. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

### To set time tracking preferences:

1. Go to Setup > Accounting > Preferences > Accounting Preferences.
2. Click the **Time & Expenses** subtab and enable or disable preferences as desired. Available preferences may include the ability to override rates on time records, to automatically round time entries, to require approvals on time records, to make time billable by default, to copy time memos to invoices, to show planned time on time tracking records and weekly timesheets, to lock timesheet periods, and to set time thresholds.

For more information, see the help topic [Time & Expenses Accounting Preferences](#).

3. Click **Save**.
4. Go to Setup > Company > Preferences > General Preferences.

Select the day of the week your company uses as the first day of the business week. The day you select is reflected on time tracking forms and on reports.

Next, you can give your employees limited access to your account so they can enter time transactions. To do this, go to Lists > Employees > Employees. Make sure the appropriate employee records are granted access to the Employee Center.

## Giving an Employee Access to Time Tracking

Giving employees access to time tracking enables them to enter the hours they spend working for a particular customer or on a project.

There are three steps you must complete to give employees access to time tracking:

1. An administrator must enable the **Time Tracking** features and set time tracking preferences.
2. You must either set up access on employee records to the Employee Center or assign a custom role with the **Track Time** permission.
3. You must provide access information to the employee.

After you have enabled time tracking, you can set preferences for how you want to use the feature.

Next, if you have not already, create an employee record for employees that you want to give access to time tracking.

For more information on creating employee records, see the following:

- [Adding an Employee](#)
- [Giving an Employee Access to NetSuite](#)
- [Assigning Roles to an Employee](#)

## Give Access to the Employee Center

As of 2018.2, you should use the following procedure and let users set up a NetSuite password for themselves. However, if you prefer to assign user passwords yourself, see [Assign a Password Manually](#) instead.

### To give an employee access to the Employee Center:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the employee to whom you want to give access.
3. Under Email | Phone | Address, ensure the employee's email address is entered.
4. Click the **Access** subtab.
5. Check the **Give Access** box.
6. If this is a new employee, check the **Send New Access Notification Email** box to inform the user how to access your NetSuite account. The standard user access notification includes the email address to use for logging in to NetSuite, and also contains a URL so that the user can set up a NetSuite password.
7. On the **Roles** tab, select **Employee Center** from the list.
8. Click **Add**.
9. Click **Save**.

## Assign a Password Manually

You should use the procedure in [Give Access to the Employee Center](#) that lets users set up a NetSuite password for themselves. However, if you prefer to assign a user's password yourself, use the following procedure.

### To manually assign a password:

1. Do one of the following:

- If the user is an employee, go to Lists > Employees > Employees.
  - If the user is not an employee, go to List > Relationships, and then select **Customers, Partners**, or **Vendors**.
2. Click **Edit** next to the user that you want to assign a role to.
  3. In the **Email** field, enter the user's email address.  
This is the email address used to log in to NetSuite.
  4. Click the **Access** tab.
  5. Check the **Give Access** box.
  6. On the **Roles** tab, select **Employee Center** from the list.
  7. Do not check the **Send New Access Notification Email** box.
  8. Check the **Manually Assign or Change Password** box.
  9. Enter a password for your user. As you type, the characters are validated against the password policy criteria, and the results displayed.



**Note:** If you need more information, see the help topic [NetSuite Password Requirements](#).

10. Enter the password again for verification.
11. Check the **Require Password Change on Next Login** box to require the user to change the password on the next login to NetSuite.

On the next login, they see the Change Password page and cannot access other NetSuite pages until a new password is created and saved.

Requiring this action protects your account from unauthorized access using generic passwords and prepares your account for an audit.



**Important:** The **Require Password Change on Next Login** box never displays as checked. When you check this box and save the record, an internal flag is set. When the password change occurs, the flag is cleared. If you later check the box again and save the record, the internal flag is reset to require another password change.

12. When you have finished entering information, click **Save**.
13. Next, tell your user the appropriate login page to go to, the email address to use for login, and the password you assigned. For security reasons, do not send the password by email.

For details, see the help topic [Types of Login Pages for Your NetSuite Account](#).

After employees log in to NetSuite, they can enter time and view their time reports.

If you enabled the **Require Approvals on Time Records** preference, supervisors can also approve time reports entered by the employees they supervise. You can also create custom approval routing workflows to enable more customization of your approval process. With custom approval routing on time entries, employees can approve or reject the entries where they are set as the Next Approver from the Employee Center.

## Assigning Custom Roles with Access to Time Tracking

### To assign an employee a custom role with access to time tracking:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Customize** next to the role you want to assign with time tracking permission.

3. Enter a name for this custom role.
4. Check the **Restrict Time and Expenses** box to permit employees to enter time for only themselves.
5. On the **Transactions** subtab, select **Track Time** in the **Permission** column.
6. In the **Level** column, select **Full**.
7. Click **Add**.
8. Click **Save**.
9. On employee records, select this role on the **Access** tab to assign this role and give access to time tracking.

## Restricting Employee Time Tracking Entries

Account administrators can control which names display for certain roles in the time entry list by editing user roles. Limits on this list restrict the ability of employees to enter time for other employees.

### To restrict employees to enter time for only themselves or their subordinates :

1. Go to Setup > Users/Roles > User Management > Manage Roles.
2. Click the **Customize** link next to the role you want to restrict.
3. Enter a new name for the restricted role.
4. On the Role page, in the **Employee Restrictions** field, select **self and subordinates only**.
5. Click **Save**.
6. Repeat steps 2 through 5 for each role you want to restrict from being able to enter time for every employee.

You must update your employee records to assign the restricted roles. For more information, see [Assigning Roles to an Employee](#).

For the roles that you customize, additional areas of NetSuite are restricted based on the selection you've made. For more information, see the help topic [Setting Employee Restrictions](#).

Period locking is controlled exclusively by the time zone of the subsidiary to which the logged-in user belongs. It can result in up to 26 hours difference in the locking time if logged-in users are out of the subsidiary. If this default behavior causes problems, set the subsidiary time zone to the time zone where the employees usually work. Or adjust the Grace Period so that all employees have enough time to enter their timesheets.

## Locking Timesheet Periods

Account administrators can disable the ability for employees to submit, edit, or add a time entry within a specific time period. You can choose to lock timesheets by closed fiscal periods, weekly, or monthly.



**Note:** The Weekly Timesheets feature is required to enable locking timesheet periods. For more information, see [Weekly Timesheets](#).

### To set up a timesheet lock:

1. Go to Setup > Accounting > Accounting Preferences. Click Time & Expenses.

2. Under Time Tracking, in the **Lock Timesheet Period** field, select the time period after which you want time entries to be locked.
  - None - time entries are always allowed.
  - Closed Fiscal Period - time entries are no longer allowed after the accounting period is closed.
  - Weekly - time entries are no longer allowed after the current week has past.
  - Monthly - time entries are no longer allowed after the current month has past.
3. If you select Weekly or Monthly, in the **Grace Period** field, enter the number of days time entries will remain open after the selected period. The grace period is dependent on which day your timesheets begin. For example, if you choose to close timesheets every week and you enter two in the Grace Period field, if your timesheets begin on Monday, they are locked on Wednesday each week.
4. When you have finished, click **Save**.

A single timesheet can contain both locked and unlocked time entries if the timesheet spans a locked and unlocked period. Administrators can unlock previously locked timesheets for a specific employee. Administrators can also edit or create time entries for a locked timesheet.

## Unlocking Timesheet Periods

You may find it necessary to unlock a time period after it has been locked for employees to update or enter time that may have been forgotten. Administrators can unlock previously locked time periods for individual employees.

### To unlock a time period:

1. Go to Transactions > Employees > Unlock Time Period. You can also click **Unlock** on the specific timesheet you want to unlock. To view a specific timesheet, go to Transactions > Employees > Weekly Timesheets > List. Click **View** next to the timesheet you want to unlock.
2. On the Unlock Time Period page, in the **Employee** field, select the employee you want to unlock the time period for. If you have clicked **Unlock** directly from the timesheet, the employee field is populated with the employee's name.
3. In the **Valid Until** field, select the date you want the lock to be reinstated.
4. In the **Start Date** field, select the start date for the period you want unlocked. If you clicked **Unlock** on a timesheet, the start date for that timesheet is automatically populated in this field.
5. In the **End Date** field, select the end date for the time period you are unlocking. For example, if you want to unlock a two week period of timesheets, select a date that is two weeks after the selected start date.
6. When you have finished, click **Save**.

Unlocking timesheet periods is only available for administrators and permission for unlocking timesheet periods is not available for custom roles.

## Entering a Time Transaction

Enter time transactions to track the hours you and other employees work.

### To enter a time transaction:

1. Go to Transactions > Employees > Track Time.
2. Select a form for this transaction.
3. Select the employee whose time you are recording.
4. NetSuite inserts the current date as the posting date of this entry. Accept or select the date for this time transaction.
5. In the **Duration** field, enter the amount of time worked for the day.

When you enter time, minutes that total more than 59 are automatically converted to hours to be added to the total time. Time entries can have minutes entered and saved in a range of 0 to 59.

For example, if you enter **:125**, it is interpreted as 125 minutes and is converted to display as 2:05. Likewise, these time entries are converted as follows:

- **0:125** is converted to 2:05 (2 hours and 5 minutes)
- **1:80** is converted to 2:20 (2 hours and 20 minutes)
- **1:120** is converted to 3:00 (3 hours and zero minutes)

If you want to time yourself as you work or time the length of your break, click the **Timer icon** next to the **Duration** field. The elapsed time in the timer fills in the **Duration** field when you click **Submit**.

6. Select a customer or project if the time worked is for a customer or project.

If you use NetSuite OneWorld, the **Intercompany Time and Expense** feature and the related **Intercompany Time** accounting preference determine whether you can select a customer or project with a subsidiary different from yours. If the feature is not enabled, or if the preference is set to **Disallow**, you cannot enter intercompany time transactions. Instead, you can only select customers or projects with the same subsidiary to which you are assigned. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

7. If you use the **Project Management** feature and selected a project in the **Customer** field with which this time is associated, you can select a related case, event, or task for the project.
8. Select the service that was provided if you track time spent on services.

If you selected a customer or project, you must select a service item.



**Note:** The service item description is automatically copied to the memo field for the time transaction. You may turn off this preference at Setup > Accounting > Accounting Preferences on the Time & Expenses subtab.

If you use NetSuite OneWorld, it is recommended that you set up service items that are available to all subsidiaries, for use in intercompany time transactions. In these transactions, users cannot save lines unless they contain service items available to both the employee subsidiary and customer subsidiary. See the help topic [Enabling Intercompany Time and Expenses](#).

9. Ensure that the **Billable** box is checked if the time is billable to a customer or project.



**Warning:** In NetSuite CRM+, the **Billable** box is not available. NetSuite CRM+ users cannot record billable time, invoice customers for billable time, or record time for payroll items.

10. If your company supports Multi-State Calculations for payroll, select the **Payroll Item Workplace** for this time entry.
11. Select a payroll item if you are tracking time for payroll.
12. Check the **Paid Externally** box if time has been or will be paid outside of NetSuite. This removes the time from payroll transactions. You cannot check this box if this time record is already associated with a paycheck in NetSuite.

13. Optionally enter a memo. You can search for the text you enter here to find this transaction later.

If you are billing this time back to a customer or project, this memo appears as a description for this line item on the customer invoice.



**Note:** Always select an activity in the **Case/Task/Event** or **Service Item** fields before entering a memo. When you select a case, task, event, or service item, the memo field is automatically populated with information from these records. Anything you entered in the memo field prior to selecting one of these records will be deleted. Changing your selection in either of these fields will update the memo field with any information from the newly selected record.

14. If your company does not use Advanced Approvals for Time, check the **Supervisor Approval** box if you are a supervisor entering time for an employee.

If your company does use Advanced Approvals for Time and you are a supervisor or time approver, select a status for this time entry in the **Approval Status** field. If you use Approval Routing, you can also select another approver in the **Next Approver** field. For more information, see [Approving or Rejecting a Time Transaction](#).

15. Under Classification, select a department, class, or location if your company tracks this information.



**Important:** If you use NetSuite OneWorld and you are entering intercompany time transactions, you must determine a strategy for using classifications on these transactions. Best practice is to omit them. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

16. If the **Override Rates on Time Records** preference has been enabled on the **Time & Expenses** subtab at Setup > Accounting > Accounting Preferences, the following fields display:

- **Price Level** - Select a price level. You can use different price levels by going to Setup > Enable Features > Customers/Sales, and checking the **Use Multiple Prices** box.
- **Rate** - If you selected a price in the **Price Level** field, it automatically appears here. If you do not use multiple prices or if you selected **Custom** in the **Price Level** field, enter a rate for this time transaction. If you are entering time for a payroll item like vacation time, leave this field blank.
- **Lock this Rate** - If you are billing this time back to a customer, check this box to lock the rate you enter so it's not affected by rate changes that happen before the customer is billed. If you are entering time for a payroll item like vacation time, leave this field blank.

17. Click **Save**.

If your company uses Approval Routing or Advanced Approvals for Time, the employee's supervisor or time approver receives an email notification when time is entered or edited.

You can also enter a time transaction on a customer or project record. To do so, go to Transactions > Employees > Track Time. Click **Edit** next to the customer.

If you billed time back to a customer or project, it appears when you click **Billable Time** on the corresponding invoice page.

If you tracked time for hourly wage payroll items and did not check the **Paid Externally** box, the time appears in the **Hours** column for this employee on the Payroll Run page.

## Deleting or Editing Time Entries

You can delete or edit time entries that you have created for yourself or other employees as long as they have not been approved by a supervisor or time approver. Administrators can delete approved time entries as long as they have not been billed.

## To delete or edit an unapproved time entry:

1. Go to Transactions > Employees > Track Time > List .
2. On the Time Entries page, click **Edit** next to time entry you want to edit or delete. You can filter the entries shown by clicking **Filters** to expand the available list filters.
3. On the Time Tracking page, do one of the following:
  - To edit the time entry, enter a new amount of time in the **Duration** field. Change any other information about the time entry as needed.
  - To delete the time entry, choose Actions > Delete.
4. Click **Save**.

If your company uses Approval Routing or Advanced Approvals for Time, the employee's supervisor or time approver receives an email notification each time a time entry is edited.

## Weekly Time Tracking

With weekly time tracking, you can track the hours you and other employees work for a week at a time.

To track time, an administrator should go to Setup > Enable Features > Employees, check the Time Tracking box, and click Save.



**Note:** If your company uses weekly timesheets, see [Weekly Timesheets](#).

## To use weekly time tracking:

1. Go to Transactions > Employees > Weekly Time Tracking.
2. Select the employee whose time you are recording.
3. In the **Date** field, enter the first day of the week you want to track time for, or click the **Pick** link to choose a date.  
NetSuite inserts the date that the current week begins as the posting date of this week's time.  
You can set the day your company's business week starts by going to Setup > Accounting > Preferences > Accounting Preferences. Click the **General** subtab.
4. If you use Project Management, you can import any planned time entries for the selected employee and week. Click **Import Planned Time** to automatically import the project time entries for the current week.
5. If you do not use the Advanced Approvals preference, check the **Supervisor Approval** box if you are a supervisor entering time for an employee.
6. On the **Enter Time** subtab, in the **Customer** column, select a customer or project if the time worked is for a customer or project.

If you use NetSuite OneWorld, the **Intercompany Time and Expense** feature and the related **Intercompany Time** accounting preference determine whether you can select a customer or project with a subsidiary different from yours. If the feature is not enabled, or if the preference is set to **Disallow**, you cannot enter intercompany time transactions. Instead, you can select only those customers or projects with the same subsidiary to which you are assigned. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

7. If you use the **Project Management** feature and selected a project in the **Customer** field, use the **Case/Task/Event** column to select an activity associated with the project and time.
8. If your company uses multi-state calculations for payroll, select a **Payroll Item Workplace**.

9. Ensure that the **Billable** box is checked if the time is billable to a customer or project. If this time is billable, you must select a customer or project.



**Warning:** In NetSuite CRM+, the **Billable** box is not available. NetSuite CRM+ users cannot record billable time, invoice customers for billable time, or record time for payroll items.

10. Select a payroll item if you are tracking time for payroll.
11. Select the service that was provided if you track time spent on services.  
If the **Billable** box is enabled, you must select a service item.  
If you use NetSuite OneWorld, it is recommended that you set up service items that are available to all subsidiaries, for use in intercompany time transactions. In these transactions, users cannot save lines unless they contain service items available to both the employee subsidiary and customer subsidiary. See the help topic [Enabling Intercompany Time and Expenses](#).
12. Select a department, class, or location if you track this information.



**Important:** If you use NetSuite OneWorld and you are entering intercompany time transactions, you must determine a strategy for using classifications on these transactions. Best practice is to omit them. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

13. If the **Override Rates on Time Records** preference has been enabled on the **Time & Expenses** subtab at Setup > Accounting > Accounting Preferences, the following fields display:
  - **Price Level** - Select a price level. You can use different price levels by going to Setup > Enable Features > Customers/Sales, and checking the **Use Multiple Prices** box.
  - **Rate** - If you selected a price in the **Price Level** field, it automatically appears here. If you do not use multiple prices or if you selected **Custom** in the **Price Level** field, enter a rate for this time transaction. If you are entering time for a payroll item like vacation time, leave this field blank.
  - **Lock this Rate** - If you are billing this time back to a customer, check this box to lock the rate you enter so it's not affected by rate changes that happen before the customer is billed. If you are entering time for a payroll item like vacation time, leave this field blank.
14. Enter a memo.

If you are billing this time back to a customer or project, this memo appears as a description for this line item on the customer invoice.



**Note:** Always select an activity in the **Case/Task/Event** or **Service Item** fields before entering a memo. When you select a case, task, event, or service item, the memo field is automatically populated with information from these records. Anything you entered in the memo field prior to selecting one of these records will be deleted. Changing your selection in either of these fields will update the memo field with any information from the newly selected record.

15. Enter the hours for each day in this week.
16. Click **Add**.
17. Repeat steps above for each customer or project you need to enter time against.
18. Click **Save** to save the entries. If you use Advanced Approvals, you can also click **Submit** to save and submit the entries

When time is saved, the time then appears on the Time Details subtab of the time tracking for that week.

If you billed time back to a customer or project, it appears when you click Billable Time on the corresponding invoice page.

If you tracked time for hourly wage payroll items, it appears in the Hours column for this employee on the Payroll Run page.

## Copying a Previous Week for a Weekly Timesheet

In addition to entering new time each week, you can also copy the time entries from a previous week on to the current week.

### To copy a previous week for weekly time tracking:

1. Go to Transactions > Employees > Weekly Time Tracking.
2. Click **Copy from Week**. A window opens with the start date of the previous week's time automatically populated.
3. In the **Date** field, you can accept the date automatically entered or use the date selector to select a different date.
4. If your company enables employees to choose to copy hours and memos, clear the **Copy Hours and Memos** box if you do not want hours and memos from the selected week to be copied to the current week.
5. Click **Copy**. Time entries within the selected week are copied to the weekly time tracking page currently being edited. Depending on your company's preferences, copied time entries may include hours and memos.
6. Continue to fill in required information for this time. When you have finished, click **Save**.

To view a list of all weekly time tracking entries you have permission to view, go to Transactions > Employees > Weekly Time Tracking > List. This list displays the employee, date, hours, and approval status of each week.

## Advanced Approvals

If your company uses the Advanced Approvals on Time preference, after time is saved on your Weekly Time Tracking page, the background of each entry reflects that entry's approval status.

- Open — white
- Approved — green
- Rejected — red
- Pending — blue

Advanced approvals enables your employees to know the status of their time entries within a single week just by looking at the Weekly Time Tracking page. When rejecting transactions, advanced approvals enables you to add a rejection note. For more information on Advanced Approvals, see [Approving or Rejecting a Time Transaction](#).

## Weekly Timesheets

Weekly timesheets works in conjunction with the existing Time Tracking feature to offer a customizable method of capturing time entries in a weekly format.

To track time with weekly timesheets, an administrator should go to Setup > Company > Enable Features and select the Employee subtab. In Time & Expenses check the Time Tracking and Weekly Timesheets boxes, and click Save.



**Note:** If your company uses weekly time tracking, see [Weekly Time Tracking](#).



**Important:** If your company has enabled the Weekly Timesheet Interface, the user interface will differ slightly from the steps described below.

## Using Weekly Timesheets

### To use weekly timesheets:

1. Go to Transactions > Employees > Weekly Timesheet.
2. Select the employee whose time you are recording. If a timesheet for the selected employee and week already exists, NetSuite loads the existing timesheet.
3. In the **Week of** field, enter the first day of the week you want to track time for, or click the icon to choose a date. NetSuite loads a new or existing timesheet.

NetSuite inserts the date that the current week begins as the posting date of this week's time.

You can set the day your company's business week starts by going to Setup > Company > General Preferences. Select the day from the **First Day of Week** list.



**Note:** If you change the first day of the week preference for your company, the newly selected first day of the week will be used for any new timesheets. Any existing timesheets will remain unchanged. New timesheets may be shorter to accommodate the new first day of the week. The first day of the week preference can be set at the company, subsidiary (for OneWorld accounts), and user level. Weekly Timesheets is only affected by the company and subsidiary preference. The user level preference has no effect on the first day of the week for weekly timesheets.

4. If you use Project Management, you can import any planned time entries for the selected employee and week. Click **Import Planned Time** to automatically import the project time entries for the current week.
5. On the **Enter Time** subtab, in the **Customer** column, select a customer or project if the time worked is for a customer or project.

If you use NetSuite OneWorld, the **Intercompany Time and Expense** feature and the related **Intercompany Time** accounting preference determine whether you can select a customer or project with a subsidiary different from yours. If the feature is not enabled, or if the preference is set to **Disallow**, you cannot enter intercompany time transactions. Instead, you can select only those customers or projects with the same subsidiary to which you are assigned. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

6. If you use the **Project Management** feature and selected a project in the **Customer** field, use the **Case/Task/Event** column to select an activity associated with the project and time.
7. If your company uses multi-state calculations for payroll, select a **Payroll Item Workplace**.
8. Ensure that the **Billable** box is checked if the time is billable to a customer or project.



**Warning:** In NetSuite CRM+, the **Billable** box is not available. NetSuite CRM+ users cannot record billable time, invoice customers for billable time, or record time for payroll items.

9. Select a payroll item if you are tracking time for payroll.
10. Select the service that was provided if you track time spent on services.

If the **Billable** box is enabled, you must select a service item.

If you use NetSuite OneWorld, it is recommended that you set up service items that are available to all subsidiaries, for use in intercompany time transactions. In these transactions, users cannot save lines unless they contain service items available to both the employee subsidiary and customer subsidiary. See the help topic [Enabling Intercompany Time and Expenses](#).

11. Select a department, class, or location if you track this information.



**Important:** If you use NetSuite OneWorld and you are entering intercompany time transactions, you must determine a strategy for using classifications on these transactions. Best practice is to omit them. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

12. If the **Override Rates on Time Records** preference has been enabled on the **Time & Expenses** subtab at Setup > Accounting > Accounting Preferences, the following fields display:
  - **Price Level** - Select a price level. You can use different price levels by going to Setup > Enable Features > Customers/Sales, and checking the **Use Multiple Prices** box.
  - **Rate** - If you selected a price in the **Price Level** field, it automatically appears here. If you do not use multiple prices or if you selected **Custom** in the **Price Level** field, enter a rate for this time transaction. If you are entering time for a payroll item like vacation time, leave this field blank.
  - **Lock this Rate** - If you are billing this time back to a customer, check this box to lock the rate you enter so it's not affected by rate changes that happen before the customer is billed. If you are entering time for a payroll item like vacation time, leave this field blank.
13. Enter a memo.

If you are billing this time back to a customer or project, this memo appears as a description for this line item on the customer invoice.



**Note:** Always select an activity in the **Case/Task/Event** or **Service Item** fields before entering a memo. When you select a case, task, event, or service item, the memo field is automatically populated with information from these records. Anything you entered in the memo field prior to selecting one of these records will be deleted. Changing your selection in either of these fields will update the memo field with any information from the newly selected record.

14. Enter the hours for each day in this week.
15. Click **Add**.
16. Repeat steps above for each customer or project you need to enter time against.
17. Click **Save** to save the entries. If you use Advanced Approvals, you can also click **Save & Submit** to save and submit the entries.

When a timesheet is saved, the time then appears on the Time Details subtab of the timesheet for that week.

If you billed time back to a customer or project, it appears when you click Billable Time on the corresponding invoice page.

If you tracked time for hourly wage payroll items, it appears in the Hours column for this employee on the Payroll Run page.

Weekly timesheets can be edited even if some or all of the time entries have been approved. Individual time entries with a status of approved or pending approval are locked and cannot be edited. You can add new time entries to weekly timesheets that have been fully approved. Any submitted weekly timesheet that has been edited must be resubmitted for approval.

## Copying a Previous Weekly Timesheet

In addition to entering new time each week, you can also copy the time entries from a previous week on to the current week.

### To copy a previous weekly timesheet:

1. Go to Transactions > Employees > Weekly Timesheet.
2. Click **Copy from Week**. A window opens with the start date of the previous week's time automatically populated.
3. In the **Date** field, you can accept the date automatically entered or use the date selector to select a different date.
4. If your company enables employees to choose to copy hours and memos, clear the **Copy Hours and Memos** box if you do not want hours and memos from the selected week to be copied to the current week.
5. Click **Copy**. Time entries within the selected week are copied to the weekly timesheet currently being edited. Depending on your company's preferences, copied time entries may include hours and memos.
6. Continue to fill in required information for this time. When you have finished, click **Save**.

To view a list of all the weekly timesheets you have permission to view, go to Transactions > Employees > Weekly Timesheet > List. This list displays the employee, date, hours, and approval status of each week.

## Retracting Weekly Timesheets

You can update your submitted time by retracting timesheets before your supervisor approves them. You can only retract timesheets if it is in pending approval. You cannot retract time transactions with any other status. The Retract button is not available in edit mode for timesheets or time transactions. Retracting timesheets is not available when you use custom approval routing.

### To retract weekly timesheets:

1. Go to Transactions > Employees > Weekly Timesheet.
2. Click **View** next to the timesheet you want to retract.



**Tip:** You can also [Retracting Individual Time Entries](#), instead of the whole weekly timesheet.

3. Click **Retract**.

NetSuite sends an e-mail to notify your supervisor of the retraction. NetSuite also updates the status of all pending time entries to Open, and the supervisor cannot see any of the previously pending time entries.

4. Make your updates.
5. Click **Submit**.

NetSuite resubmits the individual time entries.

## Retracting Individual Time Entries

You can update your submitted timesheet by retracting individual time entries before your supervisor approves them. You can only retract time entries if it is in pending approval. You cannot retract time

transactions with any other status. The Retract button is not available in edit mode for timesheets or time transactions. Retracting individual time entries is not available when you use custom approval routing.

### To retract individual time entries:

1. Go to Transactions > Employees > Weekly Timesheet.
2. Click **View** next to the timesheet from which you want the individual time entries to retract from.
3. Click the individual time entry.  
A popup window opens.
4. Click **Retract**. This action redirects you to the edit mode.
5. Make your updates.
6. Click **Submit**.  
NetSuite resubmits the weekly timesheet.

## Customizing Weekly Timesheets

When you customize your weekly timesheet you must create two custom forms. First, you create a custom time bill form for your time entries. Then, you create a custom timesheet form and select the custom time entry form as the basis for the time entry grid on your timesheet.

### To customize a weekly timesheet:

1. Go to Transactions > Employees > Weekly Timesheet.
2. Click **Customize Time Bill Form** in the Customize menu on the upper right corner of the page. A Custom Entry Form page opens.
3. Enter a name for your custom time bill form.
4. Make any changes you'd like to the form. For more information on customizing entry forms, see the help topic [Creating Custom Entry and Transaction Forms](#).



**Note:** The changes you make to the custom time bill form will change how the time entry grid appears on your weekly timesheets.

5. When you have finished, click **Save**.
6. Go to Transactions > Employees > Weekly Timesheet.
7. Click **Customize Form** in the Customize menu on the upper right corner of the page. A Custom Entry Form page opens.
8. Enter a name for your custom timesheet form.
9. In the **Time Entry Custom Form** field, select the name of your custom time bill form.
10. Make any additional changes you'd like to the form.
11. When you have finished, click **Save**.

Your custom form is now available for weekly timesheets.

## Incomplete Weekly Timesheets

You can use hidden fields to create saved searches and add dashboard reminders to track incomplete timesheets. Missing timesheets are automatically created for the current week and the previous five weeks on the first day of the week for active employees and project resources.

The following fields are hidden on the Weekly Timesheet:

- Submitted hours – Sum of pending and approved hours.
- Rejected hours – Sum of hours with rejected status.
- Planned hours – Sum of planned hours. This field is only available when Project Management and Show Planned Time in Time Entry preference are enabled.
- Allocated hours – Sum of allocated hours. This field is only available when Resource Allocations is enabled.
- Work Calendar hours – Sum of expected hours based on the employee work calendar.

All of these fields are automatically calculated and hidden by default. You must customize your weekly timesheet entry form to show these fields in the user interface. However, the fields do not need to be showing to use reminders and searches for missing timesheets.

For more information, see [Customizing Weekly Timesheets](#), [Setting Up Reminders](#), and [Defining a Saved Search](#).

## Advanced Approvals for Weekly Timesheets

If your company uses the Advanced Approvals on Time preference, after time is saved on your Weekly Timesheet page, the background of each entry reflects that entry's approval status.

- Open — white
- Approved — green
- Rejected — red
- Pending — blue

Advanced approvals enables your employees to know the status of their time entries within a single week just by looking at the Weekly Timesheet page. When rejecting transactions, advanced approvals enables you to add a rejection note. For more information on Advanced Approvals, see [Approving or Rejecting a Time Transaction](#).

## Using the Timer to Track Time

Time tracking lets you track the hours you and other employees work. You can enter the hours worked manually, use NetSuite's time calculator, or use NetSuite's Timer.

You can use the Timer to time your break or to time your entire day's work.

If you use the Timer, you cannot navigate away from the Time Tracking page and the Timer popup window. If you do, the Timer is stopped and NetSuite does not save the elapsed time.

## Using the Timer for your Break

### To use the Timer for your break:

1. Go to Transactions > Employees > Track Time.
2. Enter the time tracking details as appropriate.
3. Next to the **Duration** field, click the **Timer** icon.

4. When the Timer popup window appears, click **Start** when your break begins.
5. Click **Stop** when your break is over.
6. Click **Submit**.

The elapsed time automatically appears in the **Break** field. NetSuite rounds down to the nearest minute. For example, if the **Elapsed Time** field says **0:03:55**, **0:03** appears in the **Duration** field.

7. Fill in any additional information, and then click **Save**.

You can also use the Timer to time your entire day's work, rather than your break.

## Using the Timer for an Entire Day's Work

### To use the Timer for an entire day's work:

1. Go to Transactions > Employees > Track Time.
2. Enter the time tracking details as appropriate.
3. Next to the **Duration** field, click the **Timer** icon.
4. When the Timer popup window appears, click **Start** when you begin working.
5. Click **Pause** when you take a break.
6. Click **Start** again when you come back from your break.
7. Click **Stop** when you finish working.
8. Click **Submit**.

The elapsed time automatically appears in the **Duration** field. NetSuite rounds down to the nearest minute. For example, if the **Elapsed Time** field says **0:03:55**, **0:03** appears in the **Duration** field.

9. Fill in any additional information, and then click **Save**.

Using the Timer, NetSuite tracks your hours for you so you do not have to enter them manually.

## Calculating Total Time Worked

Time tracking lets you track the hours you and other employees work. You can enter the hours worked manually, use NetSuite's Timer, or use NetSuite's time calculator.

### To calculate your total time:

1. Go to Transactions > Employees > Track Time.
2. Enter the time tracking details as appropriate.
3. Next to the **Duration** field, click the **Calculate** link.
4. In the **Start Time** field, enter the time that the employee started working.

Enter the time in hours and minutes and include **AM** or **PM**, otherwise NetSuite automatically uses **AM**.

5. In the **End Time** field, enter the time the employee stopped working.
6. In the **Break** field, enter the length time of the employee's break.

NetSuite automatically calculates the total time for you.

7. Click **Save**.

The total time appears in the **Duration** field of the Time Tracking page.

8. Fill in any additional information, and then click **Save**.

Using NetSuite's time calculator, you can calculate your total time so you do not have to enter them manually.

## Entering Time for a Payroll Item

Time tracking lets you track the hours you and other employees work. If you are in the U.S. and you have the appropriate privileges, you can track time for employee payroll items like hourly wages.



**Warning:** NetSuite CRM+ users cannot record time for payroll items.

If you track time for employee payroll items and want these hours to be included in the payroll period, you must enable this feature on the appropriate employee records.



**Note:** If an employee enters PTO after payroll cut-off date, the PTO is processed and recorded in the following regular payroll.

## Setting up Employees' Records

### To set up employees' records so that their time transactions are included in payroll:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the name of the appropriate employee.
3. When the employee's record appears, click the **Payroll** subtab.
4. In the **Compensation Type** field, select **Wage** to pay this employee based on an hourly wage and hours worked.
5. Click **Save**.
6. Repeat steps 2 through 5 for any other employees you want to set up.

## Entering Time for a Payroll Item

### To enter time for a payroll item:

1. Go to Transactions > Employees > Track Time.
2. Choose an entry form to use.
3. Select the employee whose time you are recording.
4. NetSuite inserts the current date as the posting date of this time transaction.
5. In the **Duration** field, enter the amount of time worked for the day.

Click the timer icon next to the **Duration** field to time yourself as you work or time the length of your break. When you click **Submit**, the elapsed time in the timer fills in the **Duration** field of the Time Tracking page.

6. If applicable, select the **Customer or Project** associated with the tracked time.

If you use NetSuite OneWorld, the **Intercompany Time and Expense** feature and the related **Intercompany Time** accounting preference determine whether you can select a customer or project with a subsidiary different from yours. If the feature is not enabled, or if the preference is set to **Disallow**, you cannot enter intercompany time transactions. Instead, you can select only those customers or projects with the same subsidiary to which you are assigned. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

7. Select a case, task, event or call for the customer or project you selected, to associate this time with an activity. This time entry is added to the record you select.
8. If applicable, select the service item that was provided. If you select a service item, you must also select a customer or project. Click **New** to set up a new service item.
- If you use NetSuite OneWorld, it is recommended that you set up service items that are available to all subsidiaries, for use in intercompany time transactions. In these transactions, users cannot save lines unless they contain service items available to both the employee subsidiary and customer subsidiary. See the help topic [Enabling Intercompany Time and Expenses](#).
9. Check **Billable** if you want to bill the time entered to a customer or project.



**Warning:** In NetSuite CRM+, the **Billable** box is not available. NetSuite CRM+ users cannot record billable time, invoice customers for billable time.

10. If your company using multi-state calculations for payroll, select a **Payroll Item Workplace**.
11. Select a payroll item in the **Payroll Item** field.
12. Check the **Paid Externally** box if this time has been or will be paid outside of NetSuite. This removes this time from payroll transactions. You cannot check this box if this time is already associated with a paycheck in NetSuite.
13. Optionally enter a memo.
14. If you are a supervisor entering time for an employee, check the **Supervisor Approval** box.
15. Select a department, class, or location if you track this information.



**Important:** If you use NetSuite OneWorld and you are entering intercompany time transactions, you must determine a strategy for using classifications on these transactions. Best practice is to omit them. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

16. If you selected a **Customer or Project**, NetSuite inserts the price level for that customer or project in the **Price Level** field.  
The **Rate** field autofills with the amount associated with the price level.
17. If you are billing this time back to a customer, check **Lock the Rate** to lock the present rate so it's not affected by any rate changes made before the customer is billed.
18. Click **Save**.

If you tracked time for hourly wage payroll items, it appears in the Hours column for this employee on the Payroll Run page.

## Custom Fields in Time Tracking Pages

You can create a custom field that appears on time tracking pages. This gives you additional flexibility in tracking information that's important to your business.

You can add a custom field to the column area on time tracking pages.

## Adding a Custom Column Field to Time Transactions

### To add a custom column field to time transactions:

1. Go to Customization > Lists, Records, & Fields > Transaction Column Fields > New.
2. In the **Label** field, enter a name or description for this field. The name appears as a column heading on transactions.
3. If you use custom code, enter a unique ID for this custom field.  
NetSuite enables you to enter custom JavaScript files to perform functions specific to your business. If you do not enter an ID now, NetSuite automatically assigns one. This ID cannot be edited after it has been created.
4. Select the owner of this field. Only the owner can edit this record.
5. Enter a description for your custom field.  
This description appears next to the field on time tracking pages.
6. Select the type of custom field you want to add.
7. If you entered a custom list and you want to attach it to your transaction custom field, select the appropriate list in the **List/Record** field.
8. The **Store Value** box is checked by default. This means that information entered in this custom field is stored in your NetSuite account.  
Clear this box to indicate that the information stored in this custom field is for display only. The information is not stored in your account.
9. On the **Applies To** subtab, check the **Time** box.
10. On the **Validation & Defaulting** subtab, check the **Mandatory** box to make this a required field on the transactions you select.
11. Enter a **Default Value** for this field.
12. If you selected **List/Record** in the type field and you want to assign a default value, assign the appropriate selection in the **Default Selection** field.
13. Check **Default Checked** if you want this box to default to a checked state on the transactions pages you select.
14. On the **Sourcing & Filtering** subtab, if you have entered an item custom field and want to attach it to your transaction custom field, select it in the **Source** field.
15. Click **Save**.

Your custom field automatically appears on the Time Tracking page. When tracking weekly time, your custom field appears in the columns of Weekly Time Tracking or Weekly Timesheet pages.

If your company does not use the Combine Time Items on Invoices preference and you bill the cost of a time transaction back to a customer, you can choose to include your custom field on all custom invoices except finance charge invoices.



**Warning:** NetSuite CRM+ users cannot record billable time or invoice customers for billable time.

## Including your Transaction Custom Field on a Custom Invoice

### To include your transaction custom field on a custom invoice:

1. Go to Customization > Forms > Transaction Forms.
2. In the **Edit** column, choose one of two options:
  - Click **Customize** next to the appropriate form name to create a new custom form.
  - Click **Edit** next to the appropriate form name to include your custom field on an existing custom form.
3. When the Custom Form page appears, enter a name for your form so it is recognizable when selecting it on the Invoice page.
4. Click the **Printing Fields** subtab.
5. Click the **Columns** subtab.
6. Locate the name of your transaction custom field in the **Description** column.
7. Check the corresponding **Screen** and **Print/Email** boxes.
8. Click **Save**.

The information you enter in your transaction custom field on the Time Tracking page now appears on the corresponding invoice you create.

If your company uses the Combine Time Items on Invoices preference, you cannot include transaction custom fields on invoices because the information you enter in these fields may be different for each time record.

If your company uses Weekly Timesheets, you can also add custom body fields to the top of timesheets.

## Adding a Custom Body Field to Weekly Timesheets

### To add a custom body field to weekly timesheets:

1. Go to Customization > Lists, Records, & Fields > Other Custom Fields > New.
2. In the **Record Type** field, select **Timesheet**.
3. In the **Label** field, enter a name or description for this field.
4. If you use custom code, enter a unique ID for this custom field.  
NetSuite enables you to enter custom JavaScript files to perform functions specific to your business. If you do not enter an ID now, NetSuite automatically assigns one. This ID cannot be edited after it has been created.
5. Select the owner of this field. Only the owner can edit this record.
6. Enter a description for your custom field.  
This description appears next to the field on time tracking pages.
7. Select the type of custom field you want to add.
8. If you entered a custom list and you want to attach it to your custom field, select the appropriate list in the **List/Record** field.
9. The **Store Value** box is checked by default. This means that information entered in this custom field is stored in your NetSuite account.  
Clear this box to indicate that the information stored in this custom field is for display only. The information is not stored in your account.
10. On the **Validation & Defaulting** subtab, check the **Mandatory** box to make this a required field on the transactions you select.
11. Enter a **Default Value** for this field.

12. If you selected **List/Record** in the type field and you want to assign a default value, assign the appropriate selection in the **Default Selection** field.
13. Check **Default Checked** if you want this box to default to a checked state on the transactions pages you select.
14. On the **Sourcing & Filtering** subtab, if you have entered an item custom field and want to attach it to your transaction custom field, select it in the **Source** field.
15. Click **Save**.

Your new custom field automatically appears in the top portion of weekly timesheets.

## Approving or Rejecting a Time Transaction

Time approval is restricted to the Employee Center and the user role. You can either have your users track and approve time in the Employee Center or you can edit the user role and set employee restrictions. If you do not set employee restrictions on the user role, users can approve all time entries rather than only those of their subordinates.

You can select either a time approver or supervisor.

- The Time Approver field appears on the Time Tracking subtab of an employee record.
- The Supervisor field shows under Primary Information on an employee record.

After you assign a time approver or supervisor to an employee record, that user has the authority to approve time for the employee. Time approvers cannot edit or delete existing time entries. If no time approver is selected, then the employee's supervisor approves time entries. If both a supervisor and a time approver are selected, then only the time approver can approve time entries using their Employee Center role. For more information, see [Adding an Employee](#).

With **Customize View** you can specify details that you want to appear on timesheets. For example, Allocated Hours or Approval Status.

The employee's supervisor or time approver receives an email notification when time is entered or edited.

If you also use Project Management, you have additional options for approving project time. For more information, see the help topic [Approving Time and Expenses for Projects](#).

## Advanced Approvals

The Advanced Approvals preference offers additional statuses, a color-coded display when viewing weekly time tracking and weekly timesheets, and the ability to reject time entries and add a rejection note. After you have enabled the preference, the Supervisor Approval field on time entries and weekly time tracking and timesheets is replaced by an Approval Status field.

This field is editable by administrators and any role without time and expense restrictions. This field enables you to set the status of time entries to Open, Pending Approval, Approved, or Rejected. When viewing weekly time tracking or timesheets, approved entries are displayed with a green background, open entries have a white background, rejected entries have a red background, and pending entries have a blue background.

## Setting Approval Preferences

[To set approval preferences:](#)

1. Go to Setup > Accounting > Accounting Preferences.
2. Click the **Time & Expenses** subtab.
3. Check the **Require Approvals on Time Records** box.
4. If you'd like to use Advanced Approvals, check the **Advanced Approvals on Time Records** box.
5. Click **Save**.



**Warning:** If you decide at a later date to disable the Advanced Approvals preference, you must first adjust any time transactions with an Open or Rejected status to a Pending Approval status. Making these adjustments will prevent any further complications when the preference is turned off.

If you choose to enable Advanced Approvals on Time Records, you can also use SuiteFlow and Approval Routing to create custom approval workflows for your time entries. When using custom approval workflows, the Approve Time page is only available for time entry records. The Approve Timesheets pages is not available for custom approval workflows. For more information, see the help topics [SuiteFlow Overview](#) and [Approval Routing](#).

For more help setting up the time tracking feature and related preferences, see [Setting Up Time Tracking Preferences](#).

With Time Tracking, you can approve individual time entries from the Approve Time page.

## Approving or Rejecting Time with Time Tracking

### To approve or reject time with Time Tracking:

1. Go to Transactions > Employees > Approve Time.



**Note:** If you also use Weekly Timesheets, approving time defaults to the Approve Timesheets view. For more information see below. You can click **Switch to Time Entry view** to proceed with approving or rejecting time entries individually.

2. On the Approve Time page, select the name of the employee whose time you want to approve or reject.

You can also identify a specific pay period for that employee by selecting a date in the **Week Of** field.

For this employee, each time record displays the following information by default:

- **Employee name**
- **Date of the time record**
- **Case/Task/Event**
- **Customer**
- **Service Item**
- **Payroll Item**
- **Number of hours entered**
- **Memo**
- The **Billable** column indicates if the time entered can be billed back to the customer.

3. Optionally, click **Customize** to add filters or to select the columns to display on the Approve Time page. On the Customize page:

1. Click the **Criteria**, **Results**, or **Available Filters** subtabs.
2. Add or remove fields on the **Criteria** subtab to filter the results by other fields. Add or remove fields on the **Results** subtab to change the columns displayed. Add or remove fields on the **Additional Filters** to add filters to the page.
4. In the **Select** column, check the boxes next to the time records you want to approve or reject.



**Important:** You cannot approve and reject entries together. All the entries you select will either be all approved or all rejected. If you have multiple entries to both approve and reject, you must repeat this process for approval and again for rejection.



**Note:** You can approve or reject multiple time entries at one time, but each individual record must be selected. You cannot select time entries on a weekly basis from the Approve Time page..

5. Click **Approve** to approve the selected time entries.

Click **Reject** to reject the selected time entries without a rejection note.

Click **Reject with Note** to reject the selected time entries and add a rejection note to each selected entry. You can only add a single rejection note. The note you enter is copied to all the selected time entries.



**Warning:** Employees with appropriate permissions can modify previously approved time.

If you use Weekly Timesheets, you can approve or reject multiple entries at once.

## Approving or Rejecting Time with Weekly Timesheets

### To approve or reject time with Weekly Timesheets:

1. Go to Transactions > Employees > Approve Time.
2. On the Approve Timesheets page, select the name of the employee whose time you want to approve.

You can also identify a specific pay period for that employee by selecting a date in the **Week Of** field.

For this employee, each time record displays the following information by default:

- **Employee**
- **Period**
- **Approvable Hours**

You can click the link in the **Approvable Hours** column to open a popup that displays the individual time entries.

Optionally, you can click **Switch to Time Entry view** to display each individual time entry.

3. Optionally, click **Customize** to add filters or to select the columns to display on the Approve Timesheets page. On the Customize page:

1. Click the **Criteria**, **Results**, or **Available Filters** subtabs.
2. Add or remove fields on the **Criteria** subtab to filter the results by other fields. Add or remove fields on the **Results** subtab to change the columns displayed. Add or remove fields on the **Additional Filters** to add filters to the page.
4. In the **Select** column, check the boxes next to the timesheets you want to approve or reject.



**Important:** You cannot approve and reject timesheets together. All the timesheets you select will either be all approved or all rejected. If you have multiple timesheets to both approve and reject, you must repeat this process for approval and again for rejection.



**Note:** When approving or rejecting time entries from the timesheet view, checking the box next to a timesheet will approve or reject all entries listed on the timesheet. When approving or rejecting time entries from the time entry view, each box approves or rejects only the individual time entry.

- Click **Approve** to approve the selected timesheets.

Click **Reject** to reject the selected timesheets without a rejection note.

Click **Reject with Note** to reject the selected timesheets and add a rejection note to each selected entry. You can only add a single rejection note. The note you enter is copied to all the selected time entries.



**Warning:** Employees with appropriate permissions can modify previously approved time.

Approved time can be used to bill customers and process payroll.

If you bill time back to a customer or project, the time shows on the Billable Time subtab on the invoice.

If you track time for hourly wage payroll items, the time shows in the Hours column for each employee on the Payroll Run page.



**Warning:** NetSuite CRM+ users cannot record billable time, invoice customers for billable time, or record time for payroll items.

## Approving or Rejecting Time from the Time Transaction List

You can use inline editing and the time transactions list to approve or reject time. If you use the Require Approvals on Time Records preference, you can check the box in the Approved column to update the approval status of individual time transactions with inline editing. The Approval Status field is not available for inline editing with only the approvals preference. If you also use the Advanced Approvals on Time Records preference, you can update the Approval Status field using inline editing.

For more information on Advanced Approvals, see [Advanced Approvals](#).

## Custom Workflow-based Approvals for Time Tracking

You can choose to use SuiteFlow to create your own custom workflows to process approvals for time tracking. Using SuiteFlow for time tracking allows greater control over the approval process.

### Approval Status Field

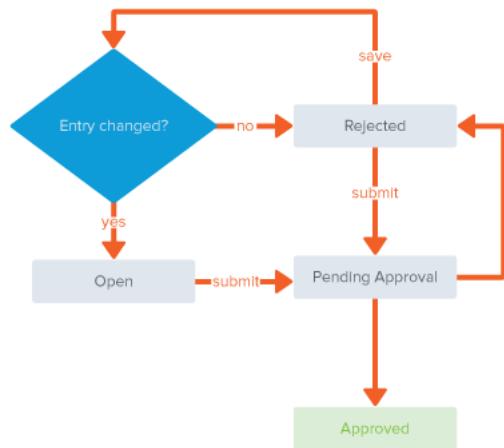
When using SuiteFlow for time tracking approvals, an Approval Status field is added to the approvals page. The Approval Status field reflects where the time report is in the approval process.

Time reports can have one of the following statuses:

- Open – No action has been taken with the report yet.
- Pending Approval – The report has been sent to the Next Approver and is in the approval queue.
- Approved – The report has been given approval for processing.

- Rejected – The report has not been approved and will not be processed.

The approval statuses listed above are standard. No additional statuses can be specified. The possibility to change the Approval Status field depends on your SuiteFlow setup. A typical approval workflow is illustrated below:



## Next Approver Field

When using SuiteFlow for time tracking approvals, a Next Approver field is added to the approval page. This field is populated according to the corresponding workflow.

The Next Approver must be defined on the timebill. The next approver can be the employee's supervisor, a project approver, or anyone else with permission to approve time for the employee.



**Note:** Supervisors who used to be a Next Approver are able to look up timesheets of former employees retrospectively using an appropriate role. They do not appear in the Employee center role, this is reserved for current approvals only.

## Updating Time Entries

You can update and transfer multiple time entries between projects at Transactions > Employees > Update Time Entries.

To update time entries in bulk, you must enable the Time Tracking and Project Management features. Administrators can use time modification to change the customer, project, or task. You can update the service item, location, department, class, or if the entry is billable. You can transfer some or all of the hours on a time entry to a different project. This enables administrators to correct time entries or change how time is billed to their customers.

If you want to enable project managers to update time entries submitted for their assigned projects, you must give full access to the Bulk Time Entry Modification permission for the project manager's assigned role. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).



**Note:** If you use Charge-Based Billing, you can update unbilled or non-posted time entries with generated charges. When you update time entries with generated charges, NetSuite deletes all charges associated with the modified time and generates new charges at the next scheduled charge generation. Billed or posted time is not yet available for modification.

### To update time entries:

1. Go to Transactions > Employees > Update Time Entries.
2. Use the filters at the top of the page to narrow down the listed time entries. Depending on the features your company uses, you can filter by customer, project, task, employee, department, class, location, subsidiary, service item, date, and if the time is billable. When you filter time entries, only time entries you have permission to edit appear in the list for selection.
3. Check the box next to each time entry you want to update. Click **Next**.
4. For fields you want to change, select the new values. When you have finished, click **Next**.



**Note:** To update the project field, you must first select the customer. To update the task field, you must first select the customer and project. If you want to transfer time, see [Transferring Time Between Projects](#) for additional information.

5. The next page shows a preview of the updated fields with the new information. Any errors are highlighted in red. You must correct errors before you can submit the changes.
6. When you have verified the changes are correct, click **Submit**.

After you submit your changes, a message appears at the top of the page confirming your submission. Click View Status to go to the Processed Records page to see the progress of your changes. Click Refresh to update the status.

## Transferring Time Between Projects

There are additional considerations for transferring time between projects to avoid any errors before submitting your changes.

If you do not use Resource Allocations, the following are required to transfer time between projects:

- The employee must be listed as a resource on the new project.
- If you want to update the task, the employee must be assigned to the new task.

If you use Resource Allocations, the following are required to transfer time between projects:

- The employee must be allocated to the new project.
- If you want to update the task and the Allow Allocated Resources to Enter Time to All Tasks project preference is not enabled, the employee must be assigned to the new task. To remove this requirement, when creating project records, on the Preferences subtab, check Allow Allocated Resources to Enter Time to All Tasks. For more information, see the help topic [Setting Up Project Record Preferences](#).

If you want to partially transfer time between projects, on the review page, update the transfer hours field with the number of hours you want transferred to the new project before submitting the changes. NetSuite updates the existing time entry to reflect the reduced hours and creates a new time entry for the transfer hours on the updated project.

## Timesheets

We are no longer initiating new installations of the Timesheets feature. We are currently in the process of making improvements to NetSuite's time tracking capabilities. These improvements will be available in future releases.

Existing Timesheets users may continue to use the feature. The guide below contains all the currently available help documentation on the Timesheets feature.

 Timesheets Guide

If you have any further questions, please contact your Account Manager to discuss your time tracking needs so that we may find a solution that best fits your company.



**Note:** The Timesheets feature is a separate feature from Time Tracking. For more information, see [Managing Time Tracking](#).

# Expense Reports and Purchase Requests

Refer to the following help topics for information about expense reports and purchase requests.

- [Expense Reporting](#)
- [Giving an Employee Access to Purchase Requests](#)
- [Notifying a Supervisor or Approver About Required Approvals](#)

## Expense Reporting

The Expense Reports feature enables users to enter expense reports and convert them into bills. An expense report records employees' expenditures to track information about the expense, such as the following:

- what was purchased
- how much was spent
- reason for the purchase
- whether it can be billed to a customer or project

The expense total remains in an unapproved expense account and has no accounting impact until the expense is approved by someone with accounting authority. After an expense report is approved, a bill is created and the expense amount is reflected on your books. The posting period for an expense report is determined after accounting approval occurs. If the posting period for the expense report date is closed, the expense report is posted to the first open period.

For information about expense reporting, see the following:

- [Expense Reports](#)
- [Employee Access to Expense Reporting](#)
- [Enter an Expense Report](#)
- [Approving an Expense Report](#)
- [Editing an Expense Report From the Expense Reports List](#)
- [Deleting an Expense Report From the Expense Reports List](#)
- [Rejecting an Expense Report From the Expense Reports List](#)
- [Corporate Card Expenses](#)
- [Reviewing Expense Reports](#)
- [Giving Accounting Approval for Expense Reports](#)
- [Paying Expenses on Employee Paychecks with Payroll](#)
- [Giving an Employee Access to Purchase Requests](#)
- [Notifying a Supervisor or Approver About Required Approvals](#)



**Note:** If you use the Multiple Currencies feature, be aware that expense line item amounts are always in the base currency of the employee. If the Use Multi Currency box is checked on an expense report, line item amounts can be entered in foreign currency. These foreign amounts are translated into base currency amounts. Exchange rates and converted amounts displayed on expense lines are provided as approximations only. Actual reimbursement amounts will be based on rates at the time of reimbursement.

## Expense Reports

See the following help topics to get an understanding of how expense reports work in NetSuite:

- [Expense Reports Features and Preferences](#)
- [Adding Currencies to the Employee Record](#)
- [Employee Entry of Expense Reports](#)
- [Supervisor Approval of Expense Reports](#)
- [Accounting Approval of Expense Reports](#)
- [Voided Expense Reports](#)
- [Expense Categories](#)
- [Expense Report Policies](#)

## Expense Reports Features and Preferences

An administrator can enable the Expense Reports feature at Setup > Company > Enable Features, on the Employees subtab. When enabled, NetSuite automatically creates an Other Current Asset type account for advances paid and a non-posting account for unapproved expense reports.

The Approval Routing feature provides the setup of an approval hierarchy required to process expense reports, time transactions, and purchase requests. After an employee enters an expense report or purchase request, additional processing of the transaction depends on the employee's expense limit or purchase limit. It also depends on the employee's designated supervisor or approver, and the approval limit of the supervisor or approver.



**Important:** When changes are made in the approval hierarchy, any expense reports not already approved are reset and must start the approval process over. For example, if an employee is assigned a new supervisor, any existing approvals of open expense reports are removed. The report is rerouted through the approval process based on the employee's new approval hierarchy.

If this feature is not enabled, each expense report or purchase request is automatically routed to the employee's immediate supervisor and then to accounting. For more information, see the help topic [Approval Routing](#).

To set preferences for entering expenses, go to Setup > Accounting > Accounting Preferences, and click the Time & Expenses subtab. For more information, see the help topic [Time & Expenses Accounting Preferences](#).

The fields that display on an expense report include the date the expense report was entered into the system, and the expense report number. Other fields include the employee filing the expense report, date range of the expenses included in the expense report, and the purpose of the expense. Expense category, date of the expense, expense of each item, any advance toward expenses, and the sum of all the expenses are also included. Expense reports include a summary box in the upper corner of the entry form to display totals for the transaction. The expense report also includes both the employee and approver signature and date. Expense reports can be customized to display additional fields. For more information, see the help topic [Report Customization](#).



**Note:** If you use NetSuite OneWorld, note the following about the Intercompany Time and Expense feature and the related Intercompany Expenses accounting preference. The feature and preference affect users' ability to enter expenses worked for customers with subsidiaries other than their own. If the feature is not enabled, or if the preference is set to Disallow, users cannot enter intercompany expenses transactions. They can only select customers with the same subsidiary to which they are assigned. If the preference is set to Allow, intercompany expenses are permitted and all subsidiaries are available to expense lines. If the preference is set to Allow and Adjust, you can generate automatic adjustments for intercompany expenses. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

You can select a default payable account for expense reports at Setup > Accounting > Accounting Preferences. For OneWorld accounts, you must set a default payable account on your subsidiary records. For more information, see the help topic [Set Subsidiary Preferences](#).

## Adding Currencies to the Employee Record

If you use multiple currencies, employees can create expense reports in currencies other than your default currency. The Multiple Currencies feature is required to create foreign currency expense reports.

You must define employee currencies for expense reports on the employee record. Only currencies available for your company can be added to an employee's expense report currencies.



**Note:** Expenses can be paid through SuitePeople U.S. Payroll only if the reimbursement currency is set to United States Dollars.

### To add currencies to the employee record:

1. Go to Lists > Employees.
2. Click **Edit** next to the employee record you want to update.
3. Click **Human Resources**.
4. Click **Expense Report Currencies**.
5. In the **Currency** field, select a currency for this employee. Click **Add**.
6. Continue to add any currencies you want this employee to be able to use for expense reports.
7. In the **Default Currency** field, select the default currency for this employee's expense reports.
8. Click **Save**.

Currency and Exchange Rate fields are added to the expense report form. An employee's default currency is automatically selected. You can select a different currency based on the currencies defined on the employee's record.



**Important:** If you change the currency on a new expense report after entering expense lines, the existing lines are not automatically updated. You must update the existing lines manually.

When creating a bill payment for an expense report, in the currency field, you can select a currency from the employee's list of defined currencies.

## Employee Entry of Expense Reports

For an employee to be able to enter an expense report, the employee must have access to the Employee Center. An administrator can give Employee Center access to an employee by editing that employee's record, available at Lists > Employees > Employees. For more information, see [Employee Access to Expense Reporting](#).

Usually, employees enter expense reports when logged in with the Employee Center role. Some employees may have other assigned roles with the Expense Reports permission. These employees may be able to enter expenses when logged in with a role other than Employee Center. If approval routing is set up, however, all expense reports must be entered through the Employee Center to maintain the hierarchy of approval routing. For more information, see [Enter an Expense Report](#).

## Supervisor Approval of Expense Reports

If the Approval Routing feature is not enabled, an employee's immediate supervisor must approve an expense report after it is completed. If Approval Routing is enabled and set up, note the following. One or more supervisors or approvers can approve an expense report before it is sent to accounting for approval.



**Important:** When changes are made in the approval hierarchy for an employee, expense reports not already approved are reset and must start the approval process over. For example, if an employee is assigned a new supervisor, any existing approvals of open expense reports are removed. The report is rerouted through the approval process based on the employee's new approval hierarchy.

A preference can be set so supervisors and approvers are notified automatically by email when expense reports have been submitted for their approval. For more information, see [Notifying a Supervisor or Approver About Required Approvals](#).

Supervisors or other approvers normally approve expense reports in the Employee Center. For more information, see [Approving an Expense Report](#).

## Accounting Approval of Expense Reports

After an expense report has received supervisory approval, it has a status of Pending Accounting Approval. It requires this accounting approval for its amounts to be posted. For more information, see [Giving Accounting Approval for Expense Reports](#).

The posting period for an expense report is determined after the expense report is approved by accounting. If this approval occurs after the expense report date's posting period has closed, the expense report is posted to the first open period.

## Voided Expense Reports

Expense reports can be voided by administrators and employees during any stage of approval. Voiding an expense report after it has been approved by accounting creates an accounting impact. Expense reports have no accounting impact prior to accounting approval. When an expense report is voided, the status is changed to Void and the expense report is removed from approval lists.



**Note:** Rarely, a previously voided expense report with no accounting impact may show a status of Paid in Full and still appear in approval lists. Opening such an expense report for editing and re-saving without making changes automatically updates the status to Void. It also removes the expense report from approval lists.

## Expense Categories

Expense categories are used to group expenses. Popular categories include transportation, lodging, mileage, and entertainment. Each expense category is linked to an account. When an employee enters an expense report, they select a category for each expense, and the expense automatically posts to the associated expense account. New expense categories cannot be created at the time an expense report is entered.

If you use NetSuite OneWorld, an expense category is available to only those subsidiaries assigned to the account linked with the expense category. To use intercompany expense transactions, set up expense categories linked to expense accounts that are available to all subsidiaries for use in these transactions. For intercompany expense transactions, users cannot save expense lines unless they contain expense categories available to both the employee subsidiary and customer subsidiary.

To enter expense categories, go to Setup > Accounting > Expense Categories > New. For more information, see the help topic [Creating an Expense Category](#).

## Expense Report Policies

You can define policies to limit the expenses your employees can enter. When creating an expense policy, you can set up the following:

- set a start date and end date on which the policy is valid
- define filters for the application of the policy
- determine how to apply the limit

For example, you can create an expense policy to limit the airfare expenses entered by your sales department for the month of June. You can also choose to apply the limit per expense report, per day or per individual line.

Expense reports must satisfy all defined filters to apply a limit. When you select multiple entries for filters, expense reports must satisfy at least one selection for each applied filter. For example, you create a policy to apply to airfare and meals for your parent subsidiary. The limit applies to any expense report entered by a parent company employee with expenses for airfare or meals. The expense report does not have to include expenses for both airfare and meals.



**Note:** Expense report policies are only available when using standard approval routing.

## Creating an Expense Report Policy

By default, only administrators have permission to create expense policies. Expense policies can be viewed in the Employee Center. You can add the Expense Policies permission to any role by creating a custom role. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

### To create an expense report policy:

1. Go to Setup > Accounting > Expense Report Policies > New.
2. Enter a name for your expense report policy.
3. Under Filters, in the **Start Date** field, select the date this policy goes into effect.
4. If this policy expires, in the **End Date** field, select the date you want the policy to end.
5. Select any other filters you want to narrow the expenses this policy applies to. You can choose to filter by subsidiary, department, location, or customer. You can also select multiple filters by clicking additional options in the dropdown list.



**Tip:** You can select the **Billable** filter to apply filters for billable expenses, non-billable expenses, or both.

6. In the **Expense Category** field, select one or more expense categories for this expense report policy.
7. Under Policy, in the **Limit Type** field, select how you want this policy applied to each expense report.

You can apply the policy to individual expense reports, all expense reports on a daily basis, or per individual expense line.

8. In the **Maximum Amount** field, enter the maximum allowed amount for this expense report policy.
9. In the **Action** field, select how you want violations to this policy handled.
  - **Warn but allow expenses outside limit** – This selection displays a warning to the employee but does allow the expense report to be submitted.
  - **Do not allow outside limit** – This selection displays a warning, and prevents expense report submission. The expense overage must be updated to be within the policy limit. The **Requires Memo**, **Requires Receipt** and **Do Not Warn if Required Fields** boxes are disabled.
  - **Do not warn if required fields are included** – This selection allows employees to submit expenses outside the limits when they include the required fields.
10. Check the **Requires Memo** box to require a memo for any expense affected by this policy.
11. Check the **Requires Receipt** box to require a receipt for any expense affected by this policy.
12. Under Overage Notification, in the **Employee** field, select any specific employees you want to be notified of any violation of this expense report policy. An employee's supervisor or approver is automatically notified.
13. When you have finished, click **Save**.

In edit mode, expense lines that violate a policy appear as red on a saved expense report. Click **Show Policies** to see a list of policies that apply to the current expense report.

Expense Report Policies																					
	VIEW	EDIT	NAME	START DATE	END DATE	CUSTOMER	EXPENSE CATEGORY	LIMIT TYPE	ACTION	MAXIMUM AMOUNT											
<input checked="" type="checkbox"/> View	<a href="#">View</a>	<a href="#">Edit</a>	USO \$500 Limit	7/9/2020	7/11/2020		USO Expense,...	Per individual ...	Warn but allo...	500.00											
<b>Overage Expense Report Lines</b>																					
The total amount of following Expense Lines should not be higher than 500.00.																					
<table border="1"> <thead> <tr> <th>Ref No.</th> <th>Date</th> <th>Expense Category</th> <th>Customer</th> <th>Amount</th> <th>Memo</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>7/9/2020</td> <td>USO Expense</td> <td></td> <td>532.52</td> <td></td> </tr> </tbody> </table>										Ref No.	Date	Expense Category	Customer	Amount	Memo	1	7/9/2020	USO Expense		532.52	
Ref No.	Date	Expense Category	Customer	Amount	Memo																
1	7/9/2020	USO Expense		532.52																	

If you have set your policies to expire, administrators receive a notification two weeks before the expiration. A reminder is sent one week before the expiration.

Project records affected by expense report policies list the applicable policies under Related Records on the project record.

## Employee Access to Expense Reporting

To permit an employee access to expense reports, the Expense Reports feature must be enabled. A user with the Enable Features permission can enable the Expense Reports feature at Setup > Company > Enable Features, on the Employees subtab.

Next, create an employee record for the person, and assign them the Employee Center role. For more information on adding employee records, see the following topics:

- [Adding an Employee](#)
- [Giving an Employee Access to NetSuite](#)
- [Assigning Roles to an Employee](#)

When an employee is given access to NetSuite, they can access Expense Reporting feature after it is enabled.

For expense reports, Employee Center access enables employees to:

- Enter their own expense reports
- View and edit their own unapproved expense reports
- View their own approved expense reports
- Approve expense reports of their subordinates

Employees who are designated as a supervisor or expense approver for other employees also have access to expense reports for these employees.

For more information on the Employee Center, see [About the Employee Center Role](#).

## Enter an Expense Report

You can enter an expense report to record expenditures and track information about the expense. Expense reports are available only for active employees.

For step-by-step procedures for entering an expense report, see the following:

- [Entering an Expense Report in the Employee Center](#)
- [Entering an Expense Report with a Role other than Employee Center](#)



**Important:** If you use NetSuite OneWorld and enter intercompany expenses, note the following if you use classes, departments, or locations to classify transactions. You must determine a strategy for using classifications on intercompany expense transactions. Best practice is to omit them. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

## Entering an Expense Report in the Employee Center

Usually, employees enter expense reports when logged in with the Employee Center role. Employees can enter expenses when logged in with a role other than Employee Center if they have the Create level of the Expense Reports permission. However, when approval routing is set up, all expense reports must be entered through the Employee Center to maintain the hierarchy of approval routing.

### To enter an expense report when logged in with the Employee Center role:

1. On the Employee Center Home page, in the **Home Links** portlet, click the **Enter Expense Reports** link.  
If you use NetSuite OneWorld, notice that the **Subsidiary** field is automatically populated with your subsidiary.
2. NetSuite inserts today's date as the date of this expense report. You can optionally enter another date.  
The **Expenses Total and Amount** field values are calculated based on the amounts entered for expense line items.  
A summary box in the upper corner of the entry form displays totals for the transaction. The summary box includes real-time totals for expenses, non-reimbursable expenses, reimbursable expenses, any advances to apply, and the total reimbursable amount.
3. Enter an advance that should be applied to any reimbursement for these expenses.
4. Enter the purpose of these expenses.
5. If your company uses foreign currency expense reports, in the **Currency** field, select the currency in which you want your reimbursement to be paid.



**Note:** Currencies must first be set up on the employee record. Only currencies defined on the employee record are available for selection in this field.

- If you use Multiple Currencies, check the **Use Multi Currency** box to show the Foreign Amount, Currency, and Exchange Rate fields for each line item. These fields let you enter expenses in foreign currencies that are reimbursed in the base currency. This is true unless an alternate currency is selected in the **Currency** field.

This box is checked by default if you have enabled the **Use Multicurrency Expense Reports** preference on the General subtab at Home > Set Preferences. You can clear the box to hide Multi Currency fields on individual expense reports. Any expenses entered when Multi Currency fields are hidden are automatically saved in the base currency.



**Important:** The rates and converted amounts displayed on expense lines are provided as approximations only. Actual reimbursement amounts will be based on rates at the time of reimbursement.

- If your company tracks them, review the default values entered for **Department**, **Class**, and **Location** to edit as necessary.



**Note:** Any department, class, or location selected in the body of the expense report does not automatically transfer to the line item fields for each expense. For this information to appear on the GL Impact for each line item you must select the appropriate information for each line item. You can also customize your forms with a custom script to automate this process. For more information, see the help topic [Enhancing NetSuite Forms with User Event Scripts](#).

If you enter intercompany expenses, the department, class, or location must be available to the subsidiary associated with the selected customer. Otherwise, an attempt to generate intercompany adjustments for the expenses will result in errors.

- If you use the American Express integration, on the **Expenses** subtab, click **Imported Expenses** to select your corporate card expense transactions.
- On the **Expenses** subtab, complete line items for expenses:
  - The **Ref No.** field is automatically populated with 1 for the first line item on this expense report. You may update this number and each new line item will use the next successive number. Line item reference numbers are helpful when referencing receipts and individual expenses.



**Note:** If you use the **Combine Detail Items on Expense Reports** preference, line items on expense reports are not listed in the order they are entered. They are regrouped by category. Line items may be listed out of order depending on the assigned category. This preference is located at Setup > Accounting > Accounting Preferences > Time & Expenses. For more information, see the help topic [Expenses](#).

- In the **Date** column, enter the actual date the expense was incurred.
- Select an expense category.

If you use NetSuite OneWorld, an expense category is available to only those subsidiaries assigned to the account linked with the expense category. To use intercompany expense transactions, set up expense categories linked to expense accounts that are available to all subsidiaries for use in these transactions. For intercompany expense transactions, users cannot save expense lines unless they contain expense categories available to both the employee subsidiary and customer subsidiary. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

- d. If you selected a category that requires a rate, quantity and rate fields appear. Enter the quantity for this expense.
- e. If a rate is not automatically populated, enter the rate for this expense category. The amount is automatically calculated from the rate and quantity.



**Note:** If you use multi-currencies, the foreign amount field is used to calculate expense report totals.

- f. If this expense was incurred in a foreign currency, select the currency, and then enter the foreign currency amount.

If you do system-generated adjustments for intercompany expenses, the currency used for those adjustments is always the base currency of the employee's subsidiary. It may not match the currency recorded. For more information, see the help topic [Creating Intercompany Adjustments for Time and Expenses](#).

- g. If it is not automatically calculated, enter the exchange rate applicable for this expense. (Be aware that any automatically calculated rate is provided as an approximation. The rate at the time of reimbursement is used to calculate the actual reimbursement amount.)
- h. In the **Amount** column, enter the amount of the expense.

If you entered a foreign currency amount for this expense, the expense is automatically converted to your base currency amount in the **Amount** column. This amount is provided as an approximation. It may not match the reimbursement amount that is calculated based on the exchange rate at the time of reimbursement.

If this expense required a rate, the amount is calculated after a quantity and rate are entered.

- i. Optionally, you can enter a memo, department, class, or location to apply only to this line item.

If you enter intercompany expenses, the department, class, or location must be available to the subsidiary associated with the selected customer. Otherwise, an attempt to generate intercompany adjustments for the expenses will result in errors.

- j. If this item is billable to a customer or project, select it from the **Customer** list, and then check the **Billable** box.



**Warning:** Checking the **Billable** box without selecting a customer will generate an error. You must select a customer if the **Billable** box is checked.

If you use NetSuite OneWorld, the Intercompany Time and Expense feature, and the related **Intercompany Expenses** accounting preference, note the following. The feature and the preference determine whether you can select a customer or project with a subsidiary different from yours. If the feature is not enabled, or if the preference is set to **Disallow**, you cannot enter intercompany expenses. Instead, you can select only those customers or projects with the same subsidiary to which you are assigned. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

- k. You can attach a receipt to each line item. In the **Attach File** column, select **List** to select your receipt from the **File Cabinet** or **New** to upload a new receipt. You can attach the same receipt to multiple line items.
  - l. If the receipt for this item is being provided, check the **Receipt** box.
  - m. If your company uses non-reimbursable expenses, and this item is not reimbursable, check the **Non-reimbursable** box. For more information, see [Non-reimbursable Expenses](#).
  - n. Click **Add**.

10. Continue adding expense line items.



**Note:** Similar line items on expense reports may be combined if your company has enabled the Combine Detail Items on Expense Reports preference. For more information, see the help topic [Projects Accounting Preferences](#).

11. When you are finished, save the expense report.



**Warning:** If your company uses expense report policies, you may receive a warning if one or more of your expense lines are over the allowed amounts. Depending on how the expense report policies are set up, you may be able to submit your expense report without changing the entered expenses. Any expense lines that are a violation of defined policies are highlighted in red. Click **Show Policies** to see details of any policy violations.

You have the following choices:

- **Submit, Submit & New, or Submit & Print** – to save the report and identify it as complete after you have entered all information.  
After an expense report is marked complete, you can no longer make changes to it.
- **Complete Later** – to save an incomplete form without submitting it. Information on the form is saved, but the form is not submitted for approval.



**Important:** Only expense reports that are submitted as complete enter the queue for supervisor or accounting approval.

## Entering an Expense Report with a Role other than Employee Center

Expense reports can be entered by employees when logged in with roles other than the Employee Center. This gives employees the ease of using a single role to handle all of their business tasks. It also enables employees to enter expense reports on behalf of another employee if they have the necessary permissions.

### To enter an expense report when logged in with a role other than Employee Center:

1. Go to Transactions > Employees > Enter Expense Reports.
2. Select a form to use.
3. In the **Exp. Rept. #** field, NetSuite increases the largest expense report number by one.  
If you wish, you can type another number. The next expense number will revert to the standard pattern. You can enter a maximum of 45 characters in this field.
4. Select the employee who incurred these expenses.  
If you use NetSuite OneWorld, notice that the **Subsidiary** field is automatically populated with the subsidiary associated with the employee.
5. Select an account for this expense. This field is only available if you have checked the **Accounting Approval** box on this form or you are editing a previously approved expense report.  
The **Expenses and Total Amount** field values are calculated based on the amounts entered for expense line items.

A summary box in the upper corner of the entry form displays totals for the transaction. The summary box includes real-time totals for expenses, non-reimbursable expenses, reimbursable expenses, any advances to apply, and the total reimbursable amount.

6. If your company uses foreign currency expense reports, in the **Currency** field, select the currency in which you want the reimbursement to be paid. The Exchange Rate field automatically shows the current exchange rate for your selected currency.



**Note:** Currencies must first be set up on the employee record. Only currencies defined on the employee record are available for selection in this field.

7. Enter any advance that should be applied to any reimbursement for these expenses.
8. Enter the purpose of this expense.
9. NetSuite inserts today's date as the date of this expense report. You can optionally enter another date.

Note that a posting period based on the current date is displayed. This period is subject to change until accounting approval of the expense report. If approval occurs after this displayed period has closed, the expense report is posted to the first open period.

10. If available, enter the due date of the expense report.
  11. Review the setting for the **Complete** box, and clear it if you intend to make changes to this expense report later.
- Only complete reports are submitted for approval and processing. Be aware that after an expense report is marked complete, you can no longer make changes to it.
12. If you have the appropriate authority, check the **Supervisor Approval**, **Accounting Approval**, or both boxes.



**Note:** If you have multiple payable accounts, after the **Account Approval** box has been checked the **Account** field automatically populates with the default payable account. You may change this account if necessary. For more information, see the help topic [Time & Expenses Accounting Preferences](#). If you use NetSuite OneWorld, see the help topic [Set Subsidiary Preferences](#).

13. Click the **Expenses** subtab.
14. If you use Multiple Currencies, check the **Use Multi Currency** box to show the **Foreign Amount**, **Currency**, and **Exchange Rate** fields for each line item. These fields let you enter expenses in foreign currencies to be reimbursed in the base currency. This is true unless an alternate currency is selected in the **Currency** field.

This box is checked by default if you use the **Use Multicurrency Expense Reports** preference on the **General** subtab at Home > Set Preferences. You can clear the box to hide Multi Currency fields on individual expense reports. Any expenses entered when Multi Currency fields are hidden are automatically saved in the base currency.



**Important:** The rates and converted amounts displayed on expense lines are provided as approximations only. Actual reimbursement amounts will be based on rates at the time of reimbursement.

15. If you use the American Express integration, on the **Expenses** subtab, click **Imported Expenses** to select your corporate card expense transactions.
16. On the **Expenses** subtab, complete line items for expenses:
  - a. The **Ref No.** field is automatically populated with 1 for the first line item on this expense report. You may update this number and each new line item will use the next successive

number. Line item reference numbers are helpful when referencing receipts and individual expenses.

**Note:** If you use the **Combine Detail Items on Expense Reports** preference, line items on expense reports are not listed in the order they are entered. They are regrouped by category. Line items may be listed out of order depending on the assigned category. This preference is located at Setup > Accounting > Accounting Preferences > Time & Expenses. For more information, see the help topic [Expenses](#).

- b. In the **Date** column, enter the actual date the expense was incurred.
- c. Select an expense category.

If you use NetSuite OneWorld, an expense category is available to only those subsidiaries assigned to the account linked with the expense category. To use intercompany expense transactions, set up expense categories linked to expense accounts that are available to all subsidiaries for use in these transactions. For intercompany expense transactions, users cannot save expense lines unless they contain expense categories available to both the employee subsidiary and customer subsidiary. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

- d. If you selected a category that requires a rate, quantity and rate fields appear. Enter the quantity for this expense.
- e. If a rate is not automatically populated, enter the rate for this expense category. The amount is automatically calculated from the rate and quantity.

**Note:** If you use multi-currencies, the foreign amount field is used to calculate expense report totals.

- f. If this expense was incurred in a foreign currency, select the currency, and enter the foreign currency amount.

If you do system-generated adjustments for intercompany expenses, the currency used for those adjustments is always the base currency of the employee's subsidiary. For more information, see the help topic [Creating Intercompany Adjustments for Time and Expenses](#).

- g. If it is not automatically calculated, enter the exchange rate applicable for this expense. (Be aware that any automatically calculated rate is provided as an approximation. The rate at the time of reimbursement is used to calculate the actual reimbursement amount.)
- h. In the **Amount** column, enter the amount of the expense.

If you entered a foreign currency amount for this expense, the expense is automatically converted to your base currency amount in the **Amount** column. This amount is an approximation, and may not match the reimbursement amount calculated based on the exchange rate at the time of reimbursement.

If this expense required a rate, the amount is calculated a quantity and rate are entered.

- i. Optionally, you can enter a memo, department, class, or location to apply only to this line item.

If you enter intercompany expenses, the department, class, or location must be available to the subsidiary associated with the selected customer. Otherwise, an attempt to generate intercompany adjustments for the expenses will result in errors.

- j. If this item is billable to a customer or project, select it from the **Customer** list and check the **Billable** box.



**Warning:** Checking the **Billable** box without selecting a customer will generate an error. You must select a customer if the **Billable** box is checked.



**Note:** If you use NetSuite OneWorld and you have shared customer records with multiple subsidiaries, you can choose any customer assigned to the default subsidiary. For information about sharing customer records with multiple subsidiaries, see the help topic [Assigning Subsidiaries to a Customer](#).

If you use NetSuite OneWorld, the Intercompany Time and Expense feature, and the related **Intercompany Expenses** accounting preference, note the following. The feature and the preference determine whether you can select a customer or project with a subsidiary different from yours. If the feature is not enabled, or if the preference is set to **Disallow**, you cannot enter intercompany expenses. Instead, you can select only those customers or projects with the same subsidiary to which you are assigned. For more information, see the help topic [Enabling Intercompany Time and Expenses](#).

- k. You can attach a receipt to each line item. In the **Attach File** column, select **List** to select your receipt from the **File Cabinet** or **New** to upload a new receipt. You can attach the same receipt to multiple line items.
  - l. If the receipt for this item is being provided, check the **Receipt** box.
  - m. If your company uses non-reimbursable expenses, and this item is not reimbursable, check the **Non-reimbursable** box. For more information, see [Non-reimbursable Expenses](#).
  - n. Click **Add**.
17. Continue adding expense line items.



**Note:** Similar line items on expense reports may be combined if your company has enabled the Combine Detail Items on Expense Reports preference. For more information, see the help topic [Projects Accounting Preferences](#).

18. When you have finished, save the expense report.



**Warning:** If your company uses expense report policies, you may receive a warning if one or more of your expense lines are over the allowed amounts. Depending on how the expense report policies are set up, you may be able to submit your expense report without changing the entered expenses. Any expense lines that are a violation of defined policies are highlighted in red. Click **Show Policies** to see details of any policy violations.



**Important:** Only expense reports that are submitted as complete enter the queue for supervisor or accounting approval.

## Approving an Expense Report

If you use the Approval Routing feature for expenses, they must be approved before they can be processed.

Expenses are generally processed through the Employee Center. You must have the Employee Center role to access the Employee Center. An administrator can add the Employee Center role on your employee record. For more information, see [Adding an Employee](#).



**Note:** In OneWorld accounts, note the following when a user who is a supervisor or approver logs in to the Employee Center. Approval queues display purchase requests, expense reports, and requisitions entered by employees associated with all subsidiaries. Role-level subsidiary restrictions that apply to other records and transactions do not apply to approvals of purchase requests, expense reports and requisitions.

## Approving Expenses Using the Approval Routing Feature

To approve an expense report, you must first log in to the Employee Center. You must have the Employee Center role to access the Employee Center. An administrator can add the Employee Center role on your employee record.

### To approve an expense report:

1. Log in to the Employee Center.
2. Go to Transactions > Employees > Enter Expense Reports > List.
3. View the report.  
If you are a supervisor and your direct reports submit an expense report, the **Approve** button is displayed.
4. Click **Approve**.

Expense reports have no accounting impact until they are approved by someone with accounting authority. When expense reports are approved by a supervisor or approver, their totals remain in an unapproved non-posting account until approved by accounting. For more information, see [Giving Accounting Approval for Expense Reports](#).

If you do not use Approval Routing, the report is automatically routed to the employee's immediate supervisor and then to accounting.

If you use Approval Routing, the supervisor or approver must have an expense approval limit greater than or equal to the amount of the report. If the amount is greater than the expense approval limit of the supervisor or approver, the report is sent to the next level of management. This continues until it is approved by an authorized supervisor or approver.

If an expense approver is specified for an employee, the supervisor is not part of the approval hierarchy.

Supervisors can automatically be notified when they have reports to approve. Only an administrator can enable supervisor notification. To enable this feature, go to Setup > Accounting > Preferences > Accounting Preferences. Check the Automatically Notify Supervisor box.

In the Employee Center, your employees can view the status and approval history of their expense reports. Employees click View & Edit Unapproved Expense Reports, or View Approved Expense Reports.

## Approving Expenses Using SuiteFlow

If you use SuiteFlow for expense approvals, the steps to approve an expense are dependent on the way the workflow is set up. For more information, see the help topics [Using Custom SuiteFlow Workflows for Approval Routing](#) and [Using Custom Workflow-Based Approvals for Expense Reports](#).

## Using Custom Workflow-Based Approvals for Expense Reports

You can use SuiteFlow to create a custom workflow to process approvals for expense reports. Using SuiteFlow for expenses provides more flexible processes for approvals.

For example, using workflows to process expenses allows for using a non-sequential approval process or conditionalized routing. You can set up a workflow that requires action from specific employees. You can show buttons on forms at certain stages, sends email based on actions taken, and much more.



**Note:** If you previously used the Approval Routing feature for purchase approvals, read [Switch From the Approval Routing Feature to Suiteflow for Expenses](#) before you proceed.

## To use SuiteFlow to process expense reports:

1. To enable features, go to Setup > Accounting > Preferences > Accounting Preferences.
  - a. On the **Transactions** subtab, enable the **Expense Reports** feature.
  - b. On the **SuiteCloud** subtab, check the **SuiteFlow** box.
  - c. Click **Save**
  - d. On the **Employees** subtab, check the **Approval Routing** box.
  - e. click **Save**

This feature must be enabled to use these fields on employee records:

  - Purchase Limit
  - Purchase Approver

These fields are required for use with the workflow.
2. To enable Approval Routing for expense reports, go to Setup > Accounting > Preferences > Accounting Preferences.
  - a. To use SuiteFlow for expense approvals, on the **Approval Routing** subtab, check the **Expense Reports** box.
3. Set up an approval workflow. You must use SuiteFlow to create a workflow to apply to your expense reports.

For more information, see the help topic [Creating Your First Workflow](#).

You can incorporate the following options into your expense approvals workflow:

- Hierarchical or custom routing rules
- Email notifications that include links to drill down to records for approval
- Approve and Reject buttons
- Respecting approval limits
- Updating the Approval Status and Next Approver field on records
- Preventing records that are pending approval from being edited
- Designating an alternate approver



**Note:** If the record is processed through multiple levels of approval by different users in a routing loop, note the following. You should use a custom workflow field that refers specifically to the current approver's approval status. This lets you track the current approver's approval status separately from the overall approval status of the record.

## Approving an Expense in the Employee Center Using SuiteFlow

When you use SuiteFlow for expense approvals, the Employee Center is the primary workspace for processing expense approvals.

- The Employee Center shows the Expense Reports to Approve reminder and Approve Expense Reports queue.

- Employees are shown all expenses for which they are the next approver.
- Users are not required to have the Full permission for the Employee Center to approve and reject expenses through the Employee Center. They can do so with only the View permission.
- Reminders that show in the Employee Center drill down to the approval queue page for expense reports. You can still click through notification email and use the buttons on the expense form (such as Approve, Reject, etc.)
- An approver that is associated with one subsidiary is able to see only records that are associated with the same subsidiary to make approvals.

### To approve an expense using SuiteFlow:

1. Log in to the Employee Center.
2. Click **Approve Expense Requests**.
3. Select a process in the **Action** field.

The Action field lists the available actions of all expense workflows. For example, you can select the workflow action of Approve, or alternately select the action Reject.

Actions available in the field are shown as follows:

Workflow name : Workflow state : Workflow action

This is an example of a workflow action selection:

Expense Approval Routing : Pending Approval : Approve

The third section shows the action that will be implemented for the selected purchases. In the case above, that action is to Approve.

The selection you make in the Action field filters the list of purchases that are displayed.

For example, select the action "Expense Approval Routing : Pending Approval : Approve." The list of expenses that appear are only ones that meet the following conditions:

- Uses the workflow named Expense Approval Routing
- Has a status of Pending Approval

You can select All in the Action field to show expenses associated with all workflows and actions.

4. After you select the workflow and action, check the **Select** box next to each expense you wish to process using the action you have selected.
5. Click **Submit**.

You also have the option of manually selecting a status in the **Approval Status** field on an expense.

## Switch From the Approval Routing Feature to Suiteflow for Expenses

If you already use the Approval Routing feature for expense reports, consider the following before you enable the preference to use SuiteFlow.

When the Expense Reports preference is enabled for approval routing, basic functions of the Approval Routing feature are **immediately disabled for expense reports**.

- Email notifications are no longer automatically sent when expense reports are awaiting an approval, are approved, or are rejected. To send such email, you must incorporate these steps into the approval workflow that you create.
- Expense transactions do not automatically show Approve and Reject buttons to process forms for approval in Employee Center. To show buttons on forms, you must incorporate them into the approval workflow that you create.

- There is no longer Supervisor or Approver hierarchy-based approval routing.
- The Supervisor Approval and Accounting Approval boxes no longer show in non-Employee Center roles.
- Expense reports that are unapproved or partially approved revert to a status of Pending Approval. You must use the Initiate Workflow Mass Update to start over in approval workflow
- You can later disable the preference and go back to using the Approval Routing feature.

To replace these former functions, you must incorporate them into an approval routing workflow you create. Now, you use SuiteFlow to process approvals for expense reports instead of the previous method associated with the Approval Routing feature.

Before you enable the preference, first set up your approval routing workflow. Then, set the workflow to Released when you enable the preference.

For details about setting up approval workflows, see the help topic [Creating Your First Workflow](#).

After you enable the preference, the following changes take place in your account with regard to expense report approvals:

## Initiate Workflow Mass Update

Expense reports existing in your account prior to using SuiteFlow that are unapproved or are partially approved will have their status set to Pending Approval. They must then be processed using workflow-based approval from the beginning.

In other words, approval steps you entered previously may need to be re-entered using SuiteFlow. You must run an Initiate Workflow mass update after you have set up your workflow.

When you run the mass update, note the following. Existing transactions that require additional approval steps are incorporated into the workflow at the appropriate stages, and are ready for remaining processing within the workflow.

For more information, see the help topic [Mass Initiating Workflow Instances](#).

## Approval Status Field

When you use SuiteFlow for expense report approvals, the forms now include an Approval Status field. The Approval Status field reflects the state of the transaction in the approval process.

Expense reports may have one of the following statuses:

- Pending Approval – The expense is in the approval queue.
- Approved – The expense has been given approval for processing.
- Rejected – The expense has not been approved and will not be processed.

Existing expense reports show the following in the new Approval Status field based on the transaction status:

Previous Status	New Status
Pending Supervisor Approval	Pending Approval
Pending Receipt	Approved
Partially Received	Approved
Pending Bill	Approved

Previous Status	New Status
Pending Billing/Partially Received	Approved
Fully Billed	Approved
Closed	Approved
Rejected by Supervisor	Rejected

## Next Approver Field

When you use SuiteFlow for expense approvals, expense reports include a Next Approver field. This field is populated based on the associated workflow.

For example, in your workflow you may create a state of Pending Approval. In that state you create a formula to set the Next Approver as the employee's supervisor.

## Editing an Expense Report From the Expense Reports List

You can use the list of expense reports to edit an individual expense report record.

### To edit an expense report from the list:

1. Go to Transactions > Employees > Enter Expense Reports > List.
2. Click **Edit** next to an expense report you want to edit.
3. On the Edit Expense Report page, edit the fields you want to change. To edit a line item on the **Expenses** subtab, click a field in the table, then click **Ok** in the line item row.
4. Click **Save**.

## Deleting an Expense Report From the Expense Reports List

You can use the list of expense reports to delete an individual expense report record.

### To delete an expense report from the list:

1. Go to Transactions > Employees > Enter Expense Reports > List.
2. Click **Edit** next to an expense report you want to delete.
3. On the Edit Expense Report page, under **Actions**, click **Delete**.
4. At the prompt to confirm the action, click **OK**.

For more information, see [Voided Expense Reports](#).

## Rejecting an Expense Report From the Expense Reports List

You can use the list of expense reports to reject an individual expense report record.

### To reject an expense report from the list:

1. Go to Transactions > Employees > Enter Expense Reports > List.
2. Click **Edit** next to an expense report you want to reject.
3. On the Edit Expense Report page, click **Reject**.
4. On the Expense Report Rejection Notice page, enter a reason for the rejection in the **Your Message** field, and then click **Save**.

On the Expense Report page, you can perform various actions using the **Actions** list. You can create a new expense report, show any expense activity, and view the GL impact of this expense.

After an expense report is rejected, it can be edited and resubmitted.

## Corporate Card Expenses

You can designate expense lines as paid by a corporate credit card on expense reports. If you have more than one credit card account, you can select the default account in Accounting Preferences. You can also select the account on the employee record and on individual expense reports. For OneWorld accounts, you can select the default account for Corporate Card Expenses on the Human Resources subtab of the employee record. Keep the same subsidiary for an employee and the credit card account. In Accounting Preferences, you can also select a default account for personal expenses paid with a corporate card. For more information, see the help topic [Time & Expenses Accounting Preferences](#). For OneWorld accounts, see the help topic [Set Subsidiary Preferences](#).

**Note:** If you have one credit card account, the Default Account for Corporate Card Expenses preference field does not appear. For OneWorld accounts, the preference field does not appear on the Subsidiary record if only one credit card account is associated with the particular subsidiary.

**Important:** If you did not use non-reimbursable expenses prior to NetSuite 18.2, they are no longer available. If you used non-reimbursable expenses prior to NetSuite 18.2, you can choose to disable the availability when entering expense reports. For more information about non-reimbursable expenses, see [Non-reimbursable Expenses](#).

To use corporate card expenses, you must first customize your expense report form to include the relevant fields. For more information on customizing forms, see the help topics [Creating Custom Entry and Transaction Forms](#) and [Configuring Sublist Fields](#).

There are two optional fields you can add to the body of your expense reports and one required field for expense line items:

- Account for Corporate Card Expense – optional field to enable the default account to be overridden at the expense report level
- Corporate Card by Default – optional field to enable all entered expenses to automatically be marked as corporate card expenses
- Corporate Card – required field to enable expenses to be marked as corporate card expenses on your expense reports

Corporate card expenses can also be marked as billable. If you use non-reimbursable expenses, when expense lines are marked as corporate card expenses they can no longer be marked as a non-reimbursable expense. You can disable non-reimbursable expenses. Go to Setup > Accounting > Accounting Preferences. On the Time & Expenses subtab, under Expenses, clear the Allow Non-reimbursable expenses box.

Expense reports including corporate card expenses debit the Expense account while crediting the selected credit card account. When reconciling a credit card statement in NetSuite, corporate card expenses show up automatically as a journal entry.

Employees whose companies pay corporate credit card bills directly can differentiate personal expenses charged to a corporate card using expense categories.

To use personal corporate card expenses, check the Personal Corporate Card Expense box on expense category records. When employees enter expense reports, they can select any personal corporate card expense category to indicate that the line item is not a company expense. Only one personal expense category may be used on a single expense report.

**Note:** Corporate card expense categories can only use other asset accounts. If your company does not use expanded account lists, the corporate card field on expense categories is disabled. Any expense category attached to an other asset account is automatically designated a corporate card expense. To enable the expanded account list preference, go to Setup > Accounting > Preferences > Accounting Preferences > General Ledger.

For more information about expense categories, see [Expense Categories](#).

## Non-reimbursable Expenses

When entering an expense report, you can mark a line item as Non-reimbursable. This function may be useful when an employee is required to enter an expense receipt but should not be reimbursed for the amount. This may be necessary if employee expenses are paid using a third party or should not be reimbursed by the company.

For example, an employee may be required to enter an expense report with a receipt for a meal to bill the amount to a client. Because the employee used a company credit card to pay for the meal, the expensed amount should not be reimbursed to the employee. Expenses that are paid with a corporate credit card are marked as non-reimbursable if the credit card bill is paid by the company.

**Important:** If you did not use non-reimbursable expenses prior to NetSuite 18.2, they are no longer available. If you used non-reimbursable expenses prior to NetSuite 18.2, you can choose disable the availability when entering expense reports. For more information on tracking non-reimbursable expenses paid by a corporate credit card, see [Corporate Card Expenses](#).

To mark an expense as non-reimbursable, on the Expenses subtab of the expense report, check the box in the Non-reimbursable column.

REF NO.	* DATE	* CATEGORY	AMOUNT	MEMO	DEPARTMENT	CLASS	CUSTOMER	BILLABLE	ATTACH FILE	RECEIPT	NON-REIMBURSABLE
2	10/2/2006	Cellular Phone	46.29		Service					Yes	
3	10/6/2006	Meals & Entertainment	89.00		Service						<input checked="" type="checkbox"/>

The employee can enter one line on the expense report for the meal and mark it as both Billable and Non-reimbursable. For any line marked Non-reimbursable, the employee will not be reimbursed for the amount on that line.

Expenses marked as non-reimbursable appear on expense reports and expense report receipts. However, they are not payable to the employee and are not included in the amount due on expense reports.

Expenses		Communication		Related Records		System Information					
REF NO.	DATE	CATEGORY	AMOUNT	MEMO	DEPARTMENT	CLASS	CUSTOMER	BILLABLE	ATTACH FILE	RECEIPT	NON-REIMBURSABLE
1	6/10/2014	Meals & Entertainment	125.00		Service						Yes

A non-reimbursable expense has no general ledger impact. An expense marked as non-reimbursable has both a debit and credit entry for the associated account canceling out any impact to your ledger accounts.

 GL Impact		Return to Expense Report #2007					
ACCOUNT	AMOUNT (DEBIT)	AMOUNT (CREDIT)	POSTING	MEMO	NAME	DEPARTMENT	CLASS
6120 Meals & Entertainment	125.00		Yes	Meals & Entertainment		Service	
6120 Meals & Entertainment		125.00	Yes	Meals & Entertainment		Service	

When the expense report is printed, amounts are categorized as Reimbursable or Non-reimbursable and subtotalized for each.

Wolfe Electronics		Expense Report	
Date	6/10/2014		
Exp. Rept. #	2007		
Employee	Brad M Sparling		
From	6/10/2014		
To	6/10/2014		
Purpose			
Category		06/10	Total
<b>Reimbursable Expenses</b>			
Cellular Phone		85.00	85.00
Mileage		34.00	34.00
<b>Non-reimbursable Expenses</b>			
Meals & Entertainment		125.00	125.00
<b>Total</b>		<b>244.00</b>	<b>244.00</b>
<b>Total Non-reimbursable</b>		<b>125.00</b>	<b>125.00</b>
<b>Total Due</b>		<b>119.00</b>	<b>119.00</b>
Advance			
Due			<b>119.00</b>
I hereby acknowledge that the expenditures listed above were made for valid company purposes.			
<b>Employee Signature &amp; Date:</b>			
<b>Approver Signature &amp; Date:</b>			

The Non-reimbursable box can be hidden by customizing the form. The box is set to appear on the form, by default.

## Importing Corporate Card Data

Using custom plug-ins, you can import corporate card data from American Express, Visa, Mastercard, or other providers. You can create a custom SuiteScript code and import corporate card charges to an imported employee expenses record. Use a Financial Institution Parser Plug-in implementation to create and upload your own parsers for different bank and credit card statement formats. Then, store them in NetSuite. For more information on mapping custom expense codes from the Financial Institution Parser Plug-in file, see the help topic [Financial Institution Parser Plug-in](#).



**Note:** The imported employee expense record is fully exposed to SuiteScript.

## Step 1 Deploying Plug-in Implementation for Custom Parser

1. Go to Main Menu > Customization > Plug-ins > Plug-in Implementations > New.
2. Click the plus sign.
3. Click **Choose file**.
4. Select your script with a custom parser.
5. Click **Save**.
6. Click **Create Plug-in Implementation**.
7. Complete the **File Name** field.



**Tip:** You can use, for example, **Custom FI XML parser**.

8. Click **Save**.

This action saves the script record.

The following code contains an example of a parser script:

```

1  /**
2  * Copyright © 2020 Oracle and/or its affiliates. All rights reserved.
3  *
4  * @NScriptType FIParserPlugin
5  * @NApiVersion 2.x
6  * @NModuleScope TargetAccount
7  */
8 define(['N/xml'], function (nXml) {
9     var module = {};
10
11     function createTransactionRecord(xmlTrans) {
12         //mandatory fields for creating new transaction
13         var mandatoryFields = Object.freeze({
14             transactionTypeCode: 'CHARGE',
15             payee: '',
16             sourceId: '',
17             transactionStatus: '',
18             customerReferenceId: '',
19             customerName: '',
20             invoiceReferenceIds: []
21         });
22         // mapping of XML variables to the plugin ones (XML vars on the left, plugin vars on the right)
23         var fieldMap = Object.freeze({
24             default: {
25                 card_holder: 'cardHolder',
26                 employee_id: 'employeeId',
27                 date: 'date',
28                 amount: 'amount',
29                 foreign_amount: 'localChargeAmount',
30                 exchange_rate: 'currencyExchangeRate',
31                 unique_id: 'id',
32                 currency: 'currency'
33             },
34             additional: {
35                 card_currency: 'billedCurrencyISOCode'
36             }
37         });
38         var nodes = xmlTrans.childNodes;
39         var record = {
40             additionalFields: {}
41         };
42
43         for (var key in mandatoryFields) {

```

```

44     record[key] = mandatoryFields[key];
45 }
46
47 for (var i = 0; i < nodes.length; i++) {
48     if (nodes[i].nodeType === 'ELEMENT_NODE') {
49         var elementName = nodes[i].nodeName;
50         var elementValue = nodes[i].textContent;
51
52         if (fieldMap.default[elementName]) {
53             record[fieldMap.default[elementName]] = elementValue;
54         } else {
55             record.additionalFields[fieldMap.additional[elementName] || elementName] = elementValue;
56         }
57     }
58 }
59
60 return record;
61 }
62
63 function getElementValue(transaction, tagName) {
64     return transaction.getElementsByTagName({tagName: tagName})[0].textContent;
65 }
66
67 module.parseData = function (context) {
68     var xml = context.inputData.getContents();
69     var xmlDoc = nXml.Parser.fromString(xml);
70     var xmlTrans = xmlDoc.getElementsByTagName("transaction");
71     var record;
72     var newAccountData;
73     var accountDataMap = {
74         getOrCreateAccountData: function (record) {
75             var uniqueId = record.employeeId + '' + record.cardHolder;
76             if (!this[uniqueId]) {
77                 this[uniqueId] = context.createAccountData({
78                     employeeId: record.employeeId,
79                     cardHolder: record.cardHolder
80                 });
81             }
82             return this[uniqueId];
83         }
84     };
85
86     for (var i = 0; i < xmlTrans.length; i++) {
87         record = createTransactionRecord(xmlTrans[i]);
88         newAccountData = accountDataMap.getOrCreateAccountData({
89             employeeId: getElementValue(xmlTrans[i], 'employee_id'),
90             cardHolder: getElementValue(xmlTrans[i], 'card_holder')
91         });
92         newAccountData.createNewTransaction(record);
93     }
94 };
95
96 return module;
97 });

```

The following table contains the fields list:

Field Name (Use in Parser)	Description	Imported Employee Expense Fields
cardHolder		cardMemberEmbossedName
employeeId		externalEmployeeId
CostCenter		costCenter
date		chargedate
id		transactionId
amount	billed amount	amount

billedTaxAmount	billed tax	taxamount
billedCurrencyISOCode	billed currency	cardCurrency
currencyExchangeRate		fxrate
localChargeAmount	local amount	fxamount
localTaxAmount	local tax	ftxtaxamount
currency	local currency	currency
expenseCategoryKey		expenseCategory
memo		memo

## Step 2 Creating Financial Institution and Format Profile

1. Go to Main Menu > Setup > Accounting > Financial Institution > New.
2. Complete the **Financial Institution** field.

 **Tip:** You can use, for example, **Custom FI**.

3. Click **Save**.
4. On your newly created financial institution record, click **Add Button** on the **Format Profile** tab.
5. Complete the following fields:
  - a. Profile Name: Custom FP
  - b. Profile Type: Corporate Card Expenses
  - c. Connectivity method: Manual Import
  - d. Transaction parser: Custom FI XML parser
  - e. On the **Import configuration** tab:
    - i. Match employee by: Cardholder Name
    - ii. Expense type: Corporate Card
    - iii. Employee expense source type: Imported Data
6. (Optional) In the Expense Code Mapping subtab, map custom expense codes from the parser plug-in file to your own expense categories in NetSuite.  
For more details on mapping custom expense codes from the Financial Institution Parser Plug-in file, see the help topics [Financial Institution Parser Plug-in](#) and [Mapping Custom Expense Codes](#)
7. (Optional) In the Parser Configuration subtab, configure your transaction parser.  
For more information, see the help topic [Transaction Parser Configuration](#).



**Note:** The Parser Configuration subtab only appears and is populated with configuration fields if your parser plug-in supports parser configuration.

8. Click **Save**.

For information on creating format profiles for expense reporting, see the help topic [Creating Format Profiles for Expense Reporting](#).

## Step 3 Importing Transaction data from a file

1. Go to Main Menu > Transactions > Bank > Banking Import History > Upload File.

2. Select the input file for parser.
3. Select Financial Institution: Custom FI.
4. Select Format Profile: FP.
5. Click **Import**.

The following code contains an example of an XML for import:

```

1 <example_card_provider_xml>
2   <transaction>
3     <card_holder>Indoors Kibbeh</card_holder>
4     <employee_id>17</employee_id>
5     <date>2020-05-15</date>
6     <amount>750</amount>
7     <foreign_amount>500</foreign_amount>
8     <exchange_rate>1.5</exchange_rate>
9     <unique_id>471201637</unique_id>
10    <card_currency>USD</card_currency>
11    <currency>CAD</currency>
12    <custom_value>1776</custom_value>
13  </transaction>
14 </example_card_provider_xml>
```

## American Express Integration for Expense Reporting

With the AMEX Corporate Card Integration SuiteApp, you can automatically import expenses charged by employees to their corporate American Express (AMEX) cards. You can set up NetSuite to import expenses on a daily basis and map each expense to your existing expense categories. Employees receive an email notification when new expenses are available. A reminder also appears in the Reminder portlet on the NetSuite Home page.

Employees can click the link in the notification or reminder to see a list of their imported expenses. You can add imported expenses to a new expense report directly from the imported expenses list. You can also add imported expenses from an expense report transaction by clicking Imported Expenses and selecting the expenses you want to add.



**Warning:** American Express only supports integration with corporate accounts. Business accounts are not included by American Express for integration with NetSuite.

The following are required to set up AMEX integration with NetSuite:

- Expense Reporting
- AMEX Corporate Card Integration SuiteApp
- Credentials for the AMEX gateway
- A role with Full access to the Financial Institution Records permission



**Note:** American Express is currently the only supported credit card company for automatic integration. You can set up manual integrations by creating your own plugins. For more information, see the help topic [Financial Institution Records](#).

If you manually configure integration with a credit card other than American Express, you cannot import expenses from different cards to a single expense report. For example, you cannot include expenses charged to both a corporate American Express and Visa on the same expense report.

Before setting up AMEX integration with NetSuite, you must download and install the AMEX Corporate Card Integration SuiteApp from the NetSuite Marketplace. For more information, see the help topic [Installing from the SuiteApp Marketplace](#).

The AMEX Corporate Card SuiteApp creates a financial institution record for American Express. It creates a format profile record, and installs two plug-ins to your account that are used to configure the connection to the AMEX server.



**Note:** If you want, you can uninstall the AMEX Corporate Card Integration SuiteApp even if corporate card integration is already set up. If you uninstall the SuiteApp, NetSuite does the following:

- Removes the AMEX Connectivity Plug-in and AMEX Parser Plug-in from the format profile AMEX Profile. The **Connectivity Method** field in the format profile is changed to Manual Import, and the **Transaction Parser** field is cleared.
- Inactivates the format profile AMEX Profile. To reactivate the format profile, you need to select a new parser plug-in. See the help topic [Modifying Format Profiles](#). If you no longer need a format profile, you should delete it. See the help topic [Deleting a Format Profile](#).



**Important:** You must contact American Express to obtain your credentials for the AMEX gateway. While filling the AMEX application for the integration service, select the following:  
**Request Type: GL1025, Setup Type: Pull Type, Protocols: SFTP/SSH.** NetSuite uses the credentials to access all the corporate card transactions from your employees. The transactions are downloaded and imported in a single file. Without the credentials, you cannot complete configuration of AMEX integration.

You must also decide, with American Express, how your transactions are matched with employees. If they are matched by Employee ID, you must supply all NetSuite employee IDs to American Express before beginning automatic imports. This lets you avoid manually matching employee expense transactions. For more information, see the help topic [Linking Employee Accounts](#).

## Configuring AMEX Integration

After you install the SuiteApp and obtain your AMEX gateway credentials, you can configure NetSuite to automatically import your corporate card transactions.

You select how you want imported transactions to be matched on the format profile record created by the AMEX Corporate Card Integration SuiteApp. Imported transactions can be matched in two ways:

- **Cardholder Name** – If you use the cardholder name, you must enter the name used on each employee's credit card on the employee record. Go to Human Resources > Corporate Cards. The names must match exactly for transactions to be mapped properly.
- **Employee ID** – If you use the employee ID, note the following. You must provide numeric employee IDs (field internalID on employee record) of all your corporate card holders to American Express to include in the transaction file.
- **Employee Expense Source Type** – If you use the employee expense source type, you must select one of the following providers:
  - American Express
  - Visa
  - Mastercard

- imported data
- other

If you are using the cardholder name for employee matching, before you begin importing your AMEX charges, note the following. You must enter the cardholder names on each employee record. If you are using employee IDs to match transactions, you can skip the steps below for entering cardholder names.

### To enter cardholder names for employees:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the employee record you want to update.
3. Click the **Human Resources** subtab.
4. Click **Corporate Cards**.
5. In the **Name on Card** field, enter the name listed on the employee's card.
6. In the **Expiration Date** field, enter the expiration date for the card.
7. In the **Corporate Card Profile** field, select the AMEX format profile created when you installed the AMEX Corporate Card Integration SuiteApp.
8. Click **Add**.
9. Click **Save**.

When you have finished entering all of your cardholder names, you can complete the configuration of your AMEX format profile and begin importing transactions.

### To configure AMEX integration:

1. Go to Setup > Accounting > Financial Statements > Financial Institution > List.
2. Click **View** next to the financial institution record for American Express.
3. Click **Format Profile: Configuration**.
4. Click **Edit** next to the AMEX format profile.
5. On the **Connectivity Configuration** subtab, enter the server URL, username, and password received from AMEX. If you do not have this information, you must contact American Express to get the connection credentials before you can proceed with configuration.
6. Click the **Import Configuration** subtab.
7. In the **Employee Matching** field, select how imported transactions are matched to employees. This selection is determined by your agreement with American Express.



**Important:** If you are using cardholder names, all cardholder names must be entered prior to your first import. If you are using employee IDs, you must provide all employee IDs to American Express prior to your first import. Failure to set cardholder names or provide employee IDs prior to importing transactions results in the need for manual matching of employee expense transaction. After a file has been imported, you must contact the credit card company if you wish to import the file again.

8. In the **Expense Type** field, select **Corporate Card**.
9. In the **Employee Expense Source Type** field, select: **American Express**.
10. Click the **Expense Code Mapping** subtab.
11. In the **Expense Category** field, select an expense category to map to each AMEX expense code.
12. When you have finished, click **Save**.

After your format profile record is saved, your expense transactions begin importing at the next scheduled daily time.



**Important:** File imports with the AMEX Credit Card Integration SuiteApp are limited to 3400 lines and 10 MB.

## Troubleshooting AMEX Integration

This section provides troubleshooting for AMEX integration. It covers the errors that you may encounter when it comes to bank import (downloading, parsing) or bulk processing (imported employee expenses, employee data).

### Connection and Parsing Errors

In case of downloading or parsing errors, view the Banking Import History page in Transactions > Bank > Bank Import History.. For specific error information, consult the Execution Log for the plug-in implementation used for the import. Go to Customization > Plug-ins > Plug-in Implementations (Administrator), select your implementation, and then click the Execution Log subtab. For more information about the Banking Import History, see the help topic [Banking Import History](#).

### Bulk Processing Errors

In case of a bulk processing error, you will receive an e-mail notification. Using the Administrator role, you can view the status and history of all the bulk processing jobs in your account. Based on the type of error, you can investigate a problem and solve the cause of an issue.

#### Severe errors preventing the creation of Imported Employee Expense

##### To prevent the creation of Imported Employee Expense errors

1. Go to Transactions > Bank > Match Bank Data (Administrator) > Status to open the process Status page and view a list of bulk processing jobs
2. Click the error count to see a detailed message.  
Transactions with errors have not been processed.
3. Fix the root cause of the problem based on the error message.  
Transaction will be processed again during the next nightly bulk processing.



**Note:** You will receive a new error e-mail notification if the error hasn't been solved.

#### Errors preventing full automatic processing of the transaction

These types of errors are usually caused by incorrect employee or expense category mapping. Imported Employee Expenses for the transactions have been created, but the status remained **Pending** as it was not possible to finish automatic processing.

##### To prevent full automatic processing of the transaction error:

1. Check the configuration of employee mapping and expense category mapping. For more information, see [Configuring AMEX Integration](#).

##### To fix existing imported employee expenses in Pending state:

1. Go to Transaction > Employees > Imported Employee Expenses.

- Filter out expenses in the **Pending** state and provide the missing information.



**Tip:** Once the data in the record is complete, it is immediately switched to the **Ready** state and it is possible to use such transaction in the Expense Report.

## Creating Expense Reports With Imported Transactions

Transactions are imported automatically each day. You can view an import history at Transactions > Bank > Bank Import History.. The Bank Import History page shows the status of previous imports. You can use this list to determine if your transactions are imported successfully.

After expense transactions are imported, email notifications are sent to employees with imported transactions. The email notification contains a link to a list of imported expenses. You can also access a list of imported expenses from the Reminders portlet in NetSuite.

You can create a new expense report from the Imported Employee Expenses page.

### To create an expense report from the Imported Employee Expenses list:

- Go to Transactions > Employees > Imported Employee Expenses.
- In the **Select** column, check the box next to each expense you want to add to a new expense report. You can only add imported expenses with the status Ready to a new expense report.
- Click **Add to New Expense Report**. A new expense report transaction opens with your imported expenses listed on the Expenses subtab. You can add additional expenses to an expense report with imported expense transactions.
- When you have finished, click **Save**.

You can also add imported expenses to new or existing expense reports by clicking Imported Expenses on the Expenses subtab of expense reports. For more information, see [Enter an Expense Report](#).

On the Imported Employee Expenses list, you can also ignore expenses. This can be useful if an expense does not need to be added to an expense report for some reason. Check the Select box next to any expense transaction you want to ignore, then click Ignore selected. Ignored expenses do not appear in the list of available expenses when adding expenses directly from an expense report.

Administrators can use the Imported Employee Expenses list to manually match any imported expenses without an employee match. Any expense without an employee listed in the employee column has failed to match to an employee. You can manually match the transaction by editing the imported transaction and selecting the appropriate employee in the Employee field. You can further investigate your settings to ensure the cardholder name or employee ID matches the credit card company file for this employee.

## Reviewing Expense Reports

You can use the list of expense reports to review status, print, or export expense report data. You can also use the list to access individual expense report records for viewing and editing.

### To review expense reports:

- To get to the list of expense reports:
  - In the Employee Center Home Links portlet, click the **View & Edit Expense Reports** link.
  - If you are logged in with a role that has the **Expense Reports** permission, go to Transactions > Employees > Enter Expense Reports > List.

2. You can do the following from the Expense Reports list:
  - Click a **View** link to view an expense report record.
  - Click an **Edit** link to make changes to or delete an expense report record.
  - Click a **Print** link to print a single expense report record.
  - Click an **Account** link to view the account register.
  - Select from the dropdowns to filter the expense report records that are displayed in the list.
  - Click **New** to create a new expense report.
  - Click **Print** to print the entire list of expense reports.
  - Click **Export** to export expense report list data to a CSV, Excel, or PDF file.
  - Click **Customize View** to change the columns displayed in the list. See the help topic [Customizing List Views](#).



**Note:** If you customize the expense report list view to include a Currency column, note the following. The listed currency values correspond to base currencies for employees and may not match the actual currencies in the expense reports.

## Giving Accounting Approval for Expense Reports

Expense reports have no accounting impact until they are approved by someone with accounting authority. When reports are entered, their totals remain in an unapproved non-posting account.

By default, an expense report requires approval by the employee's immediate supervisor before being sent for accounting approval. If approval routing is enabled and set up, a more complex approval hierarchy is followed. See the help topic [Approval Routing](#).

When an expense report receives accounting approval, a bill is automatically created and its amount is reflected on your books. The expense report is posted in the earliest open period, which may not be the same as the period when the expense report was entered.

The following three conditions must be met for a role to be able to give accounting approval of an expense report:

- Use one of the following centers:
  - Executive Center
  - E-Commerce Management Center
  - Marketing Center
  - Classic Center
  - Support Center
  - Shipping Center
  - Sales Center
  - Project Center
  - Accounting Center
  - Engineering Center
- Expense Report permission set to Edit or Full
- Restrict Time and Expense preference is set to False

You can customize an existing role or create a new role to give access to accounting approval permissions. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

If an expense report is rejected by accounting, it can be edited by the employee. It can be resubmitted for approval by the employee's immediate supervisor before being routed to accounting for approval.

Expense reports that require accounting approval can be accessed in two different places:

- Unapproved Expense Reports Register - See [Approving Expense Reports from the Register](#).
- Expense Reports List - See [Approving Expense Reports from the Expense Reports List](#).

## Setting Default Payable Accounts for non-OneWorld Account

Companies with multiple payable accounts can set a company-wide default payable account for expense reports. Setting a default account enables more consistent expense reporting across your company.

### To set a default payable account non-OneWorld account:

1. Go to Setup > Accounting > Accounting Preferences.
2. Click the **Time & Expenses** subtab.
3. In the **Default Payable Account for Expense Reports** field, select a payable account.



**Note:** The Default Payable Account for Expense Reports field is only available when you have more than one payable account.

4. Click **Save**.

In OneWorld accounts, the default payable account preference is set by subsidiary.

## Setting Default Payable Accounts for OneWorld Account

### To set a default payable account (OneWorld account):

1. Go to Setup > Company > Subsidiaries.
2. Next to the subsidiary you want to update, click **Edit**.
3. Click the **Preferences** subtab.
4. In the **Default Payable Account for Expense Reports** field, select a payable account.
5. Click **Save**.



**Note:** You can see the general ledger impact of an expense report before you approve it. You can also view the expense report record. Click the Actions menu, then click GL Impact.

## Approving Expense Reports from the Register

### To approve expense reports from the Unapproved Expense Reports Register:

1. Go to Transactions > Employees > Enter Expense Reports.
2. In the More menu, click the **Approve Expense Reports** link.
3. Click the date next to the expense report you want to approve.
4. If the report is complete, click **Approve** in the middle of the form.

If you want to reject the report, click **Reject**. When the email form appears, you can send a message to your employee about the expense report. Complete the email message, and then click **Save**.

If multiple payable accounts exist and a default account is not selected, you cannot automatically approve the expense report from the register. You must edit the expense report and manually select a payable account. You set up a default account at Setup > Accounting > Accounting Preferences > Time & Expenses.

## Approving Expense Reports from the Expense Reports List

### To approve expense reports from the list:

1. Go to Transactions > Employees > Enter Expense Reports > List.
2. Click **Edit** next to an expense report with a status of **Pending Accounting Approval**.
3. On the expense report, check the **Accounting Approval** box.
4. If multiple accounts payable accounts are available and a default account has not been set, select a payable account in the **Account** field. (This field does not display if there is only one accounts payable account.)
5. Click **Save**.



**Note:** If you customize the expense report list view to include a Currency column, note the following. The listed currency values correspond to base currencies for employees and may not match the actual currencies in the expense reports.

## Paying Expenses on Employee Paychecks with Payroll

If you use SuitePeople U.S. Payroll, you can choose to pay employees' expenses on their regular paychecks instead of paying them through accounts payable. When you use SuitePeople U.S. Payroll to pay expenses, you pay the full amount of the expense report. You can partially pay an expense report, or pay an expense report on a date other than the regular pay date. To do this, pay expenses by accounts payable. To pay expenses by accounts payable, go to Transactions > Pay Bills.

To pay expenses on employee paychecks, complete the following tasks:

1. [Setting the Pay Expenses on Paychecks Preference](#)
2. [Creating an Earning:Expense Payroll Item](#)
3. [Adding an Expense Payroll Item to an Employee Record](#)
4. [Updating Payroll Information](#)
5. [Creating a Payroll Batch that Uses the Pay Expenses Option](#)



**Note:** When you pay expenses on employee paychecks, note the following. In the general ledger, the default payable account for expense reports is debited, and the payroll funding account is credited. For more information about default payable accounts, see [Setting Default Payable Accounts for non-OneWorld Account](#).

## Setting the Pay Expenses on Paychecks Preference

### To set the Pay Expenses On Paychecks preference:

1. Go to Setup > Payroll > Set Up Payroll.

2. Check the **Pay Expenses on Paychecks** box.
3. Click **Save**.

After you enable the preference, you need to create a new payroll item.

## Creating an Earning:Expense Payroll Item

### To create or edit an Earning:Expense payroll item:

1. Go to Lists > Employees > Payroll Items.
  - To create a new payroll item, click **New**.
  - To edit an existing payroll item, click **Edit** next to the payroll item you want to edit.
2. If you have a NetSuite OneWorld account, select a subsidiary from the **Subsidiary** list.
3. From the **Item Type** list, select **Earning:Expense**.
4. In the **Item Name** field, enter a name for the earning item.
5. From the **Expense Account** list, choose any expense account. The expense account that you choose here does not determine the expense account that is debited for the reimbursement.
6. From the **Pay Code** list, select **Nontaxable Reimbursement**.
7. If necessary, select a **Report Section**.
8. Click **Save**.

Earning:Expense items do not affect an employee's gross pay. They are added to the net pay. In addition, expense items do not appear on the employee's W-2.

Next, you need to add the expense payroll item to the employee record.

## Adding an Expense Payroll Item to an Employee Record

### To add an expense payroll item to an employee record:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the employee name.
3. On the employee record click the **Payroll** subtab.
4. Click the **Earnings** subtab.
5. From the **Earnings** list, select the expense payroll item.
6. Click **Add**.
7. Click **Save**.

Add the expense payroll item to all employee records. For more information, see the help topic [Including an Employee in Payroll](#).

When an employee submits an expense report and it is approved, you can now pay the expense report when you process payroll.

## Updating Payroll Information

After you create the Earning:Expense payroll item and add the item to employee records, you must update payroll information. For more information, see the help topic [Updating Payroll Information](#).

## Creating a Payroll Batch that Uses the Pay Expenses Option

After you complete the tasks above, you can pay the expense in a payroll batch.

### To pay expenses on checks in a payroll batch:

1. Go to Transactions > Employees > Create Payroll.
2. Create the payroll batch. For more information, see the help topic [Creating a Payroll Batch](#).
3. On the Payroll Run page, verify that the **Pay Expenses** box is checked.
4. Verify that the employees you want to pay are included in the payroll.
5. Click **Calculate**.
6. When the calculation is complete, on the **Complete** subtab, click **View** next to a paycheck.
7. Click the **Expenses** subtab.
8. Verify that the expense appears on the paycheck.

After you have verified the information for the payroll batch, you can commit it. For more information, see the help topic [Committing a Payroll Batch](#).

## Giving an Employee Access to Purchase Requests

Employees with access to purchase requests can enter requests to purchase items, material or services from vendors. After requests are approved, they turn into purchase orders.

To give an employee access to purchase requests, first, someone with permission to access the Enable Features page must enable the Purchase Requests feature. Next, the employee record must be set up to give the employee access to the Employee Center.

### To enable the Purchase Requests feature:

1. Go to Setup > Company > Enable Features.
2. Click the **Employees** subtab.
3. Check the **Purchase Requests** box.
4. If you want purchase requests to be approved by a supervisor, also check the **Approval Routing** box.
5. Click **Save**.

Then, you must give your employees access to the Employee Center in your account. If you have not already set up employee records, see the following topics:

- [Adding an Employee](#)
- [Giving an Employee Access to NetSuite](#)
- [Assigning Roles to an Employee](#)

After employees log in to NetSuite, they can enter purchase requests and view and edit their purchase requests and purchase orders.

If you designate a particular employee as a supervisor or purchase approver for other employees, this person can approve or reject these employees' purchase requests.

# Notifying a Supervisor or Approver About Required Approvals

You can notify supervisors or approvers by email when they need to approve expense reports, time entries, or purchase requests.

## To notify supervisors of required approvals:

1. Go to Setup > Accounting > Accounting Preferences and click the **Time & Expenses** subtab.
2. Check the **Automatically Notify Supervisor** box.
3. Click **Save**.

Now, whenever employees submit expense reports, time entries, or purchase requests, NetSuite notifies their supervisors or approvers by email. Supervisors also receive an email notification if any changes are made to expense reports, time entries, or purchase requests prior to approval.

If the Approval Routing feature is not enabled, the employee's immediate supervisor approves an expense report, time entry, or purchase request.



**Note:** If you use custom approvals for time entries, the Automatically Notify Supervisor preference does not apply.

## Using the Approval Routing Feature

When this Approval Routing feature is enabled, an approval hierarchy can be set up with a series of designated approvers. For more information, see the help topic [Approval Routing](#).

After approval routing is set up, note the following. All expense reports, time entries, and purchase requests must be entered through the Employee Center to maintain the hierarchy of approval routing. Employees with additional assigned roles should log in with their Employee Center role to enter expense reports, time entries, or purchase requests.

## Using SuiteFlow for Purchase Approvals

If you use SuiteFlow to process purchases using custom workflows, notifying supervisors or approvers must be part of the workflow that you create. For more information, see the help topic [Using Custom SuiteFlow Workflows for Approval Routing](#).

# Analytics and Reporting

NetSuite provides analytics, which enable you to measure and analyze company headcount, hiring, turnover trends, and various employee-related reports:

- [Workforce Analytics](#)
- [Employee Reports and Workbooks](#)
- [HR Dashboard Components](#)

# Workforce Analytics

This chapter includes the following help topics:

- [Workforce Analytics Overview](#)
- [Working With Headcount Analysis](#)
- [Working With Turnover Analysis](#)

## Workforce Analytics Overview



**Warning:** This feature exposes personal information about employees. This feature should only be enabled for users who are authorized to access all employee data.

The Workforce Analytics feature gives Human Resources the tools to measure and analyze company headcount, hiring, and turnover trends. This feature compiles your data, and converts it into rich HR metrics that are available through the Headcount Analysis and Turnover Analysis pages.

The Workforce Analytics feature is available to roles that have the Workforce Analytics permission. By default, this permission is automatically added to NetSuite's standard Chief People Officer (CPO) and Human Resources Generalist roles, at access level View.

You can create custom roles that include this permission. For more information, see the help topics [Customizing or Creating NetSuite Roles](#) and [Workforce Analytics Permission Requirements](#).

Watch the following help video for information about using the Workforce Analytics feature:



The Workforce Analytics feature enables you to:

- View headcount, hire, and turnover trends in your company. For more information, see the help topic [Headcount Analysis Trends](#).
- Get a high-level synopsis of the employees who are leaving your company, and the reasons they are leaving. For more information, see the help topic [Turnover Analysis Trends](#).
- Filter and segment data by gender, employee type categories, department, location, or (with NetSuite OneWorld) subsidiary. Data can be further filtered to include subdepartment and sublocation.
- View custom snapshot views of headcount and turnover trends, for a specific quarter. For more information, see the help topics [Headcount Analysis Snapshots](#) and [Turnover Analysis Snapshots](#).



**Note:** The Workforce Analytics feature supports standard fields, such as hire date and termination/release date. Custom fields are not referenced.

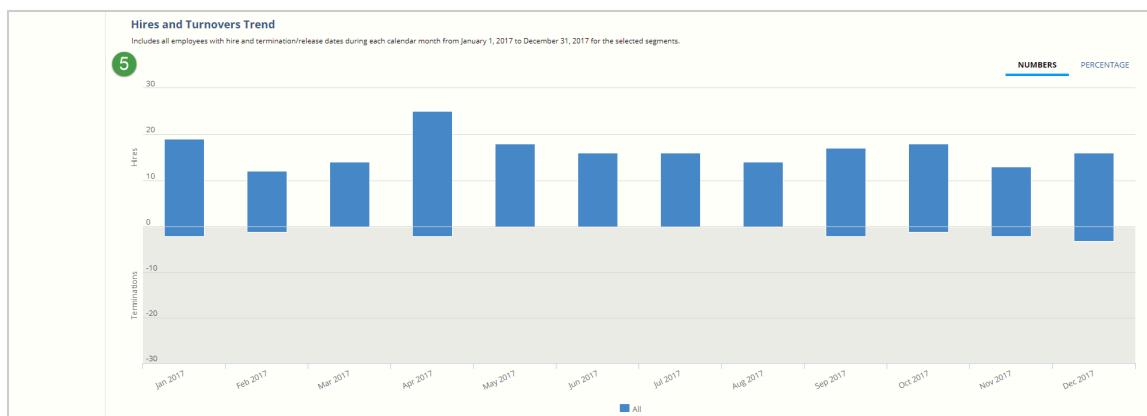
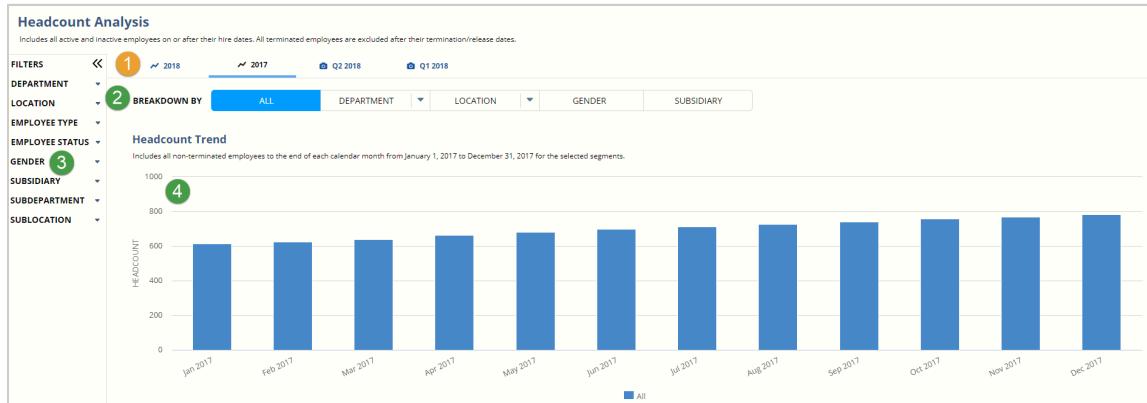
## Working With Headcount Analysis

Headcount analysis is used to analyze headcount, hire, and turnover trends in your company. This includes all active and inactive employees, on or after their hire dates. Employees who have been terminated are excluded after their termination dates. To access the Headcount Analysis page, go to Reports > Employees/HR > Headcount Analysis.

## Headcount Analysis Trends

There are two headcount analysis trends: headcount trend, and hires and turnover trend. These trends analyze year-to-date headcount, hire, and turnover trends for employees in your company for each month of the selected year. The headcount includes all active and inactive employees who have a hire date. This also includes employees who have a termination/release date that was before their hire date.

To access the headcount analysis trends, go to Reports > Employees/HR > Headcount Analysis. At the top of the page, click the year that you want to view.



The screenshot shows a detailed table of monthly headcount data for the year 2017. The table has columns for Date, Overall Headcount, Hire, Turnover, and various departmental counts like Admin, Business Mgr., Finance, etc. The table shows a general increase in headcount over the year, starting around 600 in Jan 2017 and ending near 750 in Dec 2017. A 'Copy to clipboard' button is visible at the bottom right of the table.

DATE	OVERALL			NOT SPECIFIED	ADMIN	BUSINESS MGR.	FINANCE	GA EXEC	HUMAN RESO...	LEGAL	MARKETING	PRODUCT	PRODUCT DE...	PROFESSIONA...	SALES	SERVICE
	HEADCOUNT	HIRE	TURNOVER													
Jan 31, 2017	615	19 (3.13%)	2 (0.33%)	2	0	0	55	5	28	11	26	298	0	87	45	1
Feb 28, 2017	626	12 (1.93%)	1 (0.16%)	2	0	0	57	5	29	11	27	303	0	87	45	1
Mar 31, 2017	640	14 (2.21%)	0 (0.00%)	2	0	0	57	5	29	11	27	314	1	88	45	1
Apr 30, 2017	663	25 (3.84%)	2 (0.31%)	4	0	0	59	6	29	11	28	324	2	91	45	1
May 31, 2017	681	18 (2.68%)	0 (0.00%)	4	0	0	59	6	29	11	29	329	2	98	46	1
Jun 30, 2017	697	16 (2.32%)	0 (0.00%)	4	0	0	62	6	29	11	29	337	2	100	49	1
Jul 31, 2017	713	16 (2.27%)	0 (0.00%)	4	0	0	63	6	30	11	30	345	2	101	52	1
Aug 31, 2017	727	14 (1.94%)	0 (0.00%)	4	1	0	64	6	31	11	31	351	2	103	53	1
Sep 30, 2017	742	17 (2.31%)	2 (0.27%)	4	1	0	67	6	31	11	33	358	2	103	54	1
Oct 31, 2017	759	18 (2.40%)	1 (0.13%)	4	1	0	70	6	32	12	34	365	2	103	57	1
Nov 30, 2017	770	13 (1.70%)	2 (0.26%)	4	1	0	70	6	34	12	35	368	2	107	58	1
Dec 31, 2017	783	16 (2.05%)	3 (0.39%)	4	1	0	73	6	34	13	35	374	2	109	59	1
Total	198	(28.67%)	13 (1.88%)													

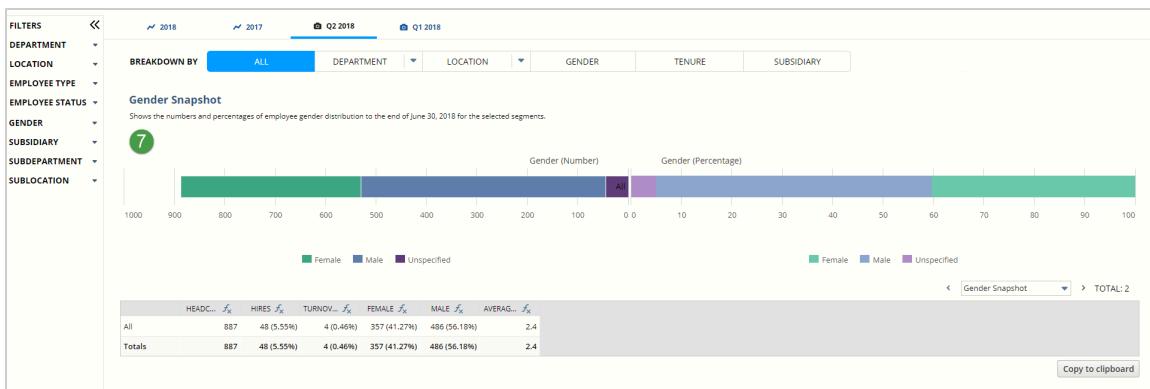
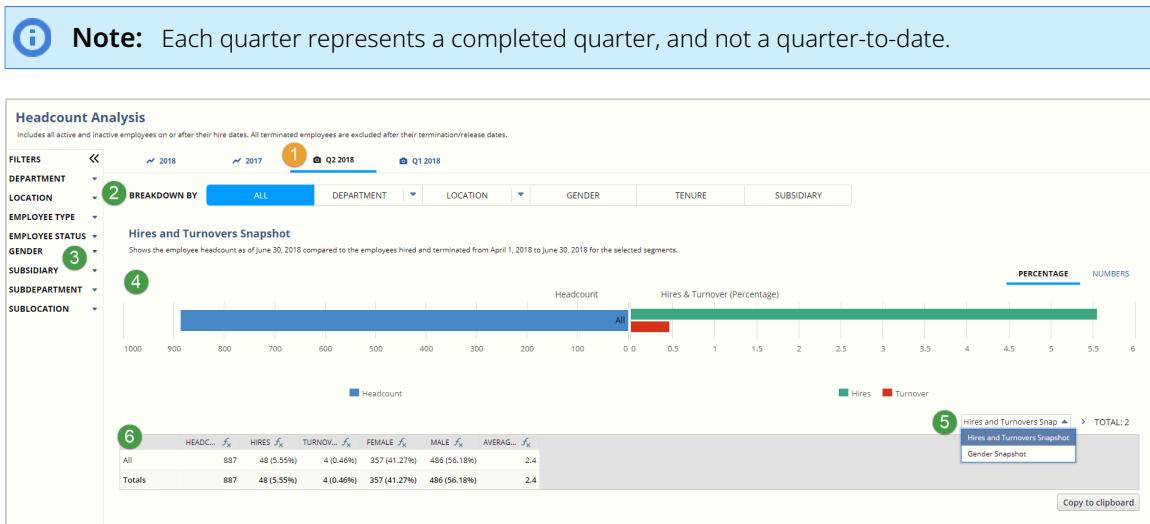
- Select the year that you want to view.
- Segment data by department, location, gender, or (with NetSuite OneWorld) subsidiary. If applicable, department and location can be further segmented by subdepartment and sublocation.
- Choose how you want to filter the data.

4	The Headcount Trend includes all non-terminated employees to the end of each calendar month of the selected year, for the selected segments.  Hover over each bar to see the total headcount in a particular month.
5	The Hires and Turnovers Trend includes all employees with hire and termination dates during each calendar month of the selected year, for the selected segments. Hover over each bar to see the total headcount for hires and terminations in a particular month.
6	This table reflects the data from the trends.  The left side shows the total employee headcount at the end of each month for the selected year. It also shows the number and percentage of hires and terminations.  The right side shows the headcount data for the selected segments and filters. For example, if <b>Location (All)</b> is selected, the total headcount for each location is shown.  To copy and paste the data into other analysis tools, click <b>Copy to Clipboard</b> .

## Headcount Analysis Snapshots

There are two headcount analysis snapshots: hires and turnovers, and gender. These snapshots allow you to analyze quarterly headcount trends.

To access the headcount analysis snapshots, go to Reports > Employees/HR > Headcount Analysis. At the top of the page, click the quarter that you want to view.



1	Select the quarter that you want to view.
2	Segment data by department, location, gender, tenure, or (with NetSuite OneWorld) subsidiary. If applicable, department and location can be further segmented by subdepartment and sublocation.  <b>Note:</b> When segmenting by tenure, the start of an employee's tenure is their <b>Hire Date</b> set on their employee record.
3	Choose how you want to filter the data.
4	The Hires and Turnovers Snapshot lets you compare the hiring and turnover rates between the different segments in your company.  The left side shows the employee headcount, as of the last day in the period, for the selected segments.  The right side shows the number of employees hired and terminated during the period, for the selected segments.
5	Switch between the different snapshots.
6	This table reflects the data from the snapshots. To copy and paste the data into other analysis tools, click <b>Copy to Clipboard</b> .
7	The Gender Snapshot shows the numbers and percentages of employee gender distribution as of the last day in the period, for the selected segments.  The left side shows the total headcount, and the right side shows male and female headcount percentages.

## Working With Turnover Analysis

Turnover analysis is used to analyze the employees who are leaving your company and the reasons they are leaving. This can help you to identify challenges, and use that information to improve employee experience and plan strategies. Turnover analysis includes all active and inactive employees with a termination/release date for each month of the current and previous year. Employees who do not have a hire date entered on their employee record are not included.

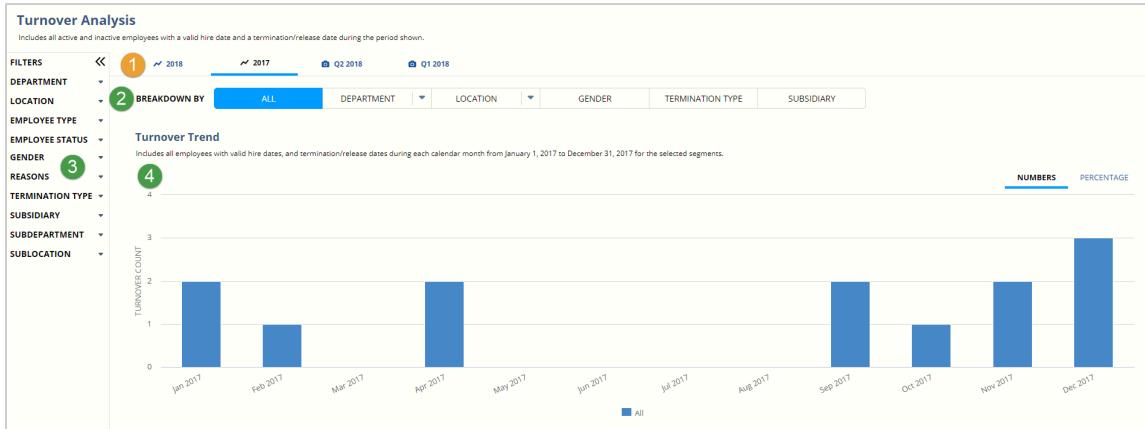
To access the Turnover Analysis page, go to Reports > Employees/HR > Turnover Analysis.

**Note:** To use turnover analysis, make sure your account has the Termination Reasons Tracking feature enabled. For more information, see [Termination Reason Tracking](#).

## Turnover Analysis Trends

There are two turnover analysis trends: turnover trend and turnover reasons trend. These trends analyze year-to-date headcount, hire, and turnover trends for employees in your company, for each month of the selected year.

To access the turnover analysis trends, go to Reports > Employees/HR > Turnover Analysis. At the top of the page, click the year that you want to view.



**Turnover Reasons Trend**

Shows each of the termination reasons for the selected termination types, which include at least one terminated employee.

**5**

	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	Jun 2017	Jul 2017	Aug 2017	Sep 2017	Oct 2017	Nov 2017	Dec 2017	Total
Family Reasons	1	0	0	0	0	0	0	0	1	0	1	0	3
Insubordination	0	0	0	0	0	0	0	0	1	0	1	0	2
Unsatisfactory Performance	0	0	0	1	0	0	0	0	0	0	0	1	2
Another job	0	0	0	1	0	0	0	0	0	0	0	0	1
Enlisted in Armed Forces	0	0	0	0	0	0	0	0	0	0	0	1	1
Voluntary Retirement	0	0	0	0	0	0	0	0	1	0	0	0	1
Involuntary Retirement	0	1	0	0	0	0	0	0	0	0	0	0	1
Return to School	0	0	0	0	0	0	0	0	0	0	1	0	1
Marriage	1	0	0	0	0	0	0	0	0	0	0	0	1

**6**

DATE	OVERALL			NOT SPECIFIED	TEST	TESTING 23	TEST1	ATTENDANCE	ANOTHER JOB	DISABILITY	DISSATISFACT...	DISSATISFACT...	DISSATISFACT...	ENLISTED IN A...	FAMILY REAS...	HEALTH REA...
	HEADC...	HIRE	TURNNOV...													
Jan 31, 2017	615	19 (3.13%)	2 (0.33%)	0	0	0	0	0	0	0	0	0	0	0	1	0
Feb 28, 2017	626	12 (1.93%)	1 (0.16%)	0	0	0	0	0	0	0	0	0	0	0	0	0
Mar 31, 2017	640	14 (2.21%)	0 (0.00%)	0	0	0	0	0	0	0	0	0	0	0	0	0
Apr 30, 2017	663	25 (3.84%)	2 (0.31%)	0	0	0	0	0	1	0	0	0	0	0	0	0
May 31, 2017	681	18 (2.68%)	0 (0.00%)	0	0	0	0	0	0	0	0	0	0	0	0	0
Jun 30, 2017	697	16 (2.32%)	0 (0.00%)	0	0	0	0	0	0	0	0	0	0	0	0	0
Jul 31, 2017	713	16 (2.27%)	0 (0.00%)	0	0	0	0	0	0	0	0	0	0	0	0	0
Aug 31, 2017	727	14 (1.94%)	0 (0.00%)	0	0	0	0	0	0	0	0	0	0	0	0	0
Sep 30, 2017	742	17 (2.31%)	2 (0.27%)	0	0	0	0	0	0	0	0	0	0	0	1	0
Oct 31, 2017	759	18 (2.40%)	1 (0.13%)	0	0	0	0	0	0	0	0	0	0	0	0	0
Nov 30, 2017	770	13 (1.70%)	2 (0.26%)	0	0	0	0	0	0	0	0	0	0	0	1	0
Dec 31, 2017	783	16 (2.06%)	3 (0.39%)	0	0	0	0	0	0	0	0	0	0	0	1	0
<b>Total</b>	<b>198</b>	<b>19 (28.67%)</b>	<b>13 (1.88%)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>3</b>	<b>0</b>	

[Copy to clipboard](#)

- Select the year that you want to view.
- Segment data by department, location, gender, termination type, or (with NetSuite OneWorld) subsidiary. If applicable, department and location can be further segmented by subdepartment and sublocation.
- Choose how you want to filter the data.
- The Turnover Trend includes all employees with termination/release dates during each calendar month of the selected year, for the selected segments.  
Employees with a termination/release date within a calendar month contribute to the turnover count for that month.  
Hover over each bar to see the total turnover in a particular month.

5	The Turnover Reasons Trend analyzes all the termination reasons for each selected termination type, that contains at least one terminated employee. The data is broken down for each calendar month of the selected year, for the selected segments. Rows appear in descending order with the highest turnover reason at the top.
6	This table reflects the data from the trends. The left side shows the total employee headcount at the end of each month for the selected year. It also shows the number and percentage of hires and terminations. The right side shows the headcount data for the selected segments and filters. For example, if <b>Location (All)</b> is selected, the total headcount for each location is shown. To copy and paste the data into other analysis tools, click <b>Copy to Clipboard</b> .

## Turnover Analysis Snapshots

There are three turnover analysis snapshots: hires and turnovers, gender, and turnover types (voluntary, involuntary). The turnover analysis snapshots allow you to analyze quarterly turnover trends.

To access the turnover analysis snapshots, go to Reports > Employees/HR > Turnover Analysis. At the top of the page, click the quarter that you want to view.

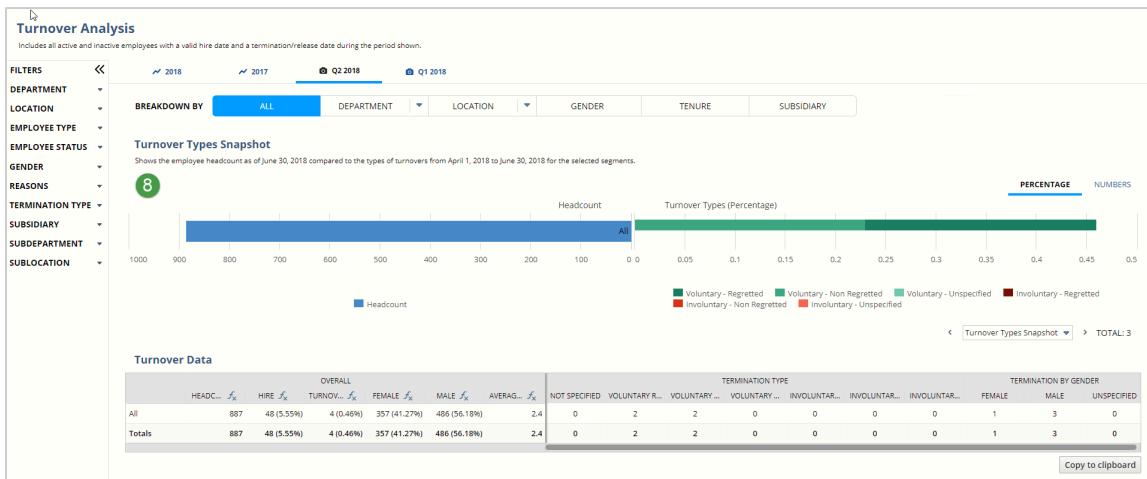
**Note:** Each quarter represents a completed quarter, and not a quarter-to-date.

**Hires and Turnovers Snapshot**  
Shows the employee headcount as of June 30, 2018 compared to the employees hired and terminated from April 1, 2018 to June 30, 2018 for the selected segments.

	HEADCOUNT	HIRE	OVERALL TURNOVER	FEMALE	MALE	AVERAGE	TERMINATION TYPE	TERMINATION BY GENDER
All	887	48 (5.55%)	4 (0.44%)	357 (41.27%)	486 (56.19%)	2.4	NOT SPECIFIED VOLUNTARY RELEASE INVOLUNTARY TERMINATION INVESTIGATION	FEMALE MALE UNSPECIFIED
Totals	887	48 (5.55%)	4 (0.46%)	357 (41.27%)	486 (56.18%)	2.4	0 2 2 0 0 0 0 0 0 1 3 0	0 1 3 0

**Gender Snapshot**  
Shows the gender distribution of all employees as of June 30, 2018 compared to the gender distribution of terminated employees from April 1, 2018 to June 30, 2018 for the selected segments.

	HEADCOUNT	HIRE	OVERALL TURNOVER	FEMALE	MALE	AVERAGE	TERMINATION TYPE	TERMINATION BY GENDER
All	887	48 (5.55%)	4 (0.44%)	357 (41.27%)	486 (56.19%)	2.4	NOT SPECIFIED VOLUNTARY RELEASE INVOLUNTARY TERMINATION INVESTIGATION	FEMALE MALE UNSPECIFIED
Totals	887	48 (5.55%)	4 (0.46%)	357 (41.27%)	486 (56.18%)	2.4	0 2 2 0 0 0 0 0 0 1 3 0	0 1 3 0



- 1 Select the quarter that you want to view.
- 2 Segment data by department, location, gender, tenure, or (with NetSuite OneWorld) subsidiary. If applicable, department, and location can be further segmented by subdepartment and sublocation.
 

**i Note:** When segmenting by tenure, the start of an employee's tenure is the **Hire Date** set on the employee record.
- 3 Choose how you want to filter the data.
- 4 The Hires and Turnovers Snapshot for turnover analysis lets you view employee changes for a specific period. The left side shows the employee headcount as of the last day in the period, for the selected segments. This data is compared to the right side of the graph. The right side shows the number of employees hired and terminated during the period, for the selected segments.
- 5 Toggle between the different snapshots.
- 6 This table reflects the data from the snapshots. To copy and paste the data into other analysis tools, click **Copy to Clipboard**.
- 7 The Gender Snapshot for turnover analysis, analyzes the turnovers in your company by gender. It compares the gender distribution of employees in your company to the gender distribution of terminated employees. You can view any disproportional terminations in a gender group, for the selected segments.
- 8 The Turnover Types Snapshot analyzes the turnovers in your company by type, such as voluntary-regretted and involuntary-unregretted. It shows the employee headcount as of the end of the period. It compares it to the types of turnovers from the start to the end date, for the selected segments.

# Employee Reports and Workbooks

NetSuite provides many different kinds of employee-related reports and workbooks:

- [Time and Billables Reports](#)
- [Time-Off Management Reports and Workbooks](#)
- [Recruiting Reports](#)
- [Employee Change History Report](#)
- [Employee Saved Search Reports](#)
- [Customizing Employee Reports](#)
- [Employee Bonus History and Current Compensation Workbook](#)
- [Performance Management Saved Searches and Workbooks](#)

## Time and Billables Reports

The following standard time and billables reports are available in NetSuite. Some reports are available only if you use Project Management.

- [Earned Value by Project Report](#)
- [Time Entry Exceptions Report](#)
- [Time by Employee/Item/Customer Reports](#)
  - [Time by Employee Summary Report](#)
  - [Time by Employee Detail Report](#)
  - [Time by Customer Summary Report](#)
  - [Time by Customer Detail Report](#)
  - [Time by Item Summary Report](#)
  - [Time by Item Detail Report](#)
- [Current Backlog By Resource Report](#)
- [Estimated Profitability by Project Report](#)
- [Unbilled Cost by Customer Summary Report](#)
- [Unbilled Cost by Customer Detail Report](#)
- [Unbilled Time by Customer Summary Report](#)
- [Unbilled Time by Customer Detail Report](#)

## Time-Off Management Reports and Workbooks

The Time-Off Management feature includes a variety of reporting capabilities that you can use to retrieve, present, and analyze your time-off data.

The following reports are included with the Time-Off Management feature:

- [Available Time-Off Report](#)
- [Time-Off Balance Summary Report](#)

- [Time-Off Balance Details Report](#)
- [Time-Off Analysis Workbook](#)
- [Time-Off Tracking Reports](#)

If no standard report fits your needs, you can create an ad hoc report. For more information, see the help topic [Time-Off Management Ad Hoc Reports](#).

You can also customize these standard reports in the Report Builder by clicking **Customize** on the results page. For more information, see the help topics [Report Builder Interface](#) and [Report Customization](#).

## Available Time-Off Report

The standard Available Time-Off report summarizes the total number of used and scheduled time-off, and the available time-off based on usage. It also summarizes the time-off for the entire year across all classes, departments, locations, and subsidiaries. You can use this report to quickly see an employee's available time-off balance as of the current date.

To view the Available Time-Off report, go to Reports > Employees/HR > Available Time-Off.

This report displays the following for each employee:

- **Time-Off Type**
- **Annual Entitlement** - The total available time-off for the current year. Includes all future accruals for the current year when the **Days Available Includes Future Accruals** box on the Time-Off Plan page is selected. For more information, see the help topic [Creating a Time-Off Plan](#).
- **Used** - The amount of time-off that has been used as of the current date.
- **Scheduled** - The amount of time-off that has been requested and approved, but not yet taken.
- **Available Now** - Total remaining time-off for the current year.

To customize this report and display it in the Report Builder, click **Customize**. For more information, see the help topic [Report Customization](#).

The following selections are included for customization on the Available Time-Off report:

- Available Time-Off:
  - Annual Entitlement - The employee's total time-off for the current year. This is based on the number of days or hours the employee is entitled to for the particular time-off type.
  - Available Now - The employee's remaining time-off for the current year.
  - Scheduled - The amount of time-off, in hours, that has been requested and approved, but not yet taken.
  - Used - The amount of time-off, in hours, that has been used for the current year.
- Time-Off Change Type:
  - Name - The name of the time-off change type. For example, approved time-off request, manual adjustment, or automatic accrual.
- Time-Off Type:
  - Display Name - The time-off type display name.
  - Inactive - Indicates when a time-off type is inactive.
  - Increment Unit - Indicates whether the minimum increment of time-off is in days or hours.
  - Minimum Increment - The minimum increment of time-off required.

- Name - The name of the time-off type.
- Track Only - Indicates when a time-off type is track only.

## Time-Off Balance Summary Report

The Time-Off Balance Summary report displays the amount of time-off employees have earned up to the current date. This is based on the rules defined in the plan assigned to them. This report is useful for accounting purposes when you need to determine an employee's available time-off balance on a specific date.

To view the Time-Off Balance Summary report, go to Reports > Employees/HR > Time-Off Balance Summary.

This report displays the following for each employee:

- **Time-Off Type** - The employee's name and the time-off types that are available to them.
- **Carried Over** - If an employee is entitled to carry over unused time from the previous year, it appears in this column.
- **Earned** - The number of hours that have been accrued as of the current date, for each time-off type.
- **Used** - The amount of used time-off for each time-off type in the plan.
- **Carryover Expiry** - If any carryover has expired it appears in this column.
- **Balance** - Displays the balance as of the current date.

**Note:** If you must search for a balance summary between a specific date range, note that the standard report does not display year-end expiry values. To get an accurate balance summary, set the start date to January 1st. Set the end date to whatever date you want to view the balance to. If required, you can customize the report to include year end expiry.

To customize this report and display it in the Report Builder, click **Customize**. For more information, see the help topic [Report Customization](#).

The following selections are included for customization on the Time-Off Balance Summary report:

- Time-Off Balance Adjustments:
  - Amount (Excluding year-end expiry) - Displays the balance without taking year-end expiry into account. Use this when running a report within a single year.
  - Amount (Including year-end expiry) - The balance calculated includes the year-end expiry. Any positive balances at the end of the year are automatically adjusted to zero. Use this when running a report across multiple years. Use this in conjunction with Expired to see the full balance expiry at the end of the plan period. It also shows the carryover amount credit at the beginning of the plan period.
  - Carried Over - If an employee is entitled to carry over unused time from the previous year, it appears in this column.
  - Carryover Expiry - If any carryover expired it appears in this column.
  - Date Applied - The date the change was applied. Add this if you are looking to display each time off change individually.
  - Earned - The number of hours that have been accrued for the specified date range.
  - Expired - The amount of time-off that has expired at year end for the specified date range.
  - Used - The amount of used time-off for each time-off type for the specified date range.

- Time-Off Change Type:
  - Name - The name of the time-off change type. For example, approved time-off request, manual adjustment, or automatic accrual.
- Time-Off Type:
  - Display Name - The time-off type display name.
  - Inactive - Indicates when a time-off type is inactive.
  - Increment Unit - Indicates whether the minimum increment of time-off is in days or hours.
  - Minimum Increment - The minimum increment of time-off required for the time-off type.
  - Name - The name of the time-off type.
  - Track Only - Indicates when a time-off type is track only.

## Time-Off Balance Details Report

The Time-Off Balance Details report contains a complete breakdown of each employee's time-off changes. This report is useful when you need more information than what is available on the Time-Off Balance Summary report. It contains an entry for each adjustment that was made to an employee's time-off. This includes the date of the change, and the type of adjustment (for example, manual increase or usage). It also shows the type of time-off the adjustment was made to (for example, vacation time, or sick leave).

To view the Time-Off Balance Details report, go to Reports > Employees/HR > Time-Off Balance Details.

This report displays the following for each employee:

- **Time-Off Type** - Displays the employee's name and the time-off types that are available to them.
- **Date** - The date the change was applied.
- **Adjustment Type** - Distinguishes whether the adjustment was due to regular usage or whether a manual increase or decrease was made.
- **Amount** - The amount of time-off that was debited or credited.
- **Balance** - Displays the current balance.
- **Accrual Rate** - If the time-off change is an accrual based on hours worked, displays the accrual rate.
- **Hours Worked** - If the time-off change is an accrual based on hours worked, displays the hours worked reported on the employee's approved time entry.



**Note:** If you must search for a balance summary between a specific date range, note that the standard report does not display year-end expiry values. To get an accurate balance summary the search dates must be in complete years and start on January 1st. If required, you can customize the report to include year-end expiry.

To customize this report and display it in the Report Builder, click **Customize**. For more information, see the help topic [Report Customization](#).

The following selections are included for customization on the Time-Off Balance Details report:

- Time-Off Balance Adjustments:
  - Amount (Including year end expiry) - The balance calculated includes the year end expiry. Any positive balances are automatically adjusted to zero on December 31st and carry over is credited back to the employee on January 1st.
  - Amount (Excluding year end expiry) - Calculates the balance without taking year end expiry into account. Use this when running a report within a single year.

- Amount - Displays a running total of an employee's balance.
- Carried Over - If an employee has carried over unused time-off from the previous year it appears in this column.
- Carryover Expiry - If any carryover expired it appears in this column.
- Date Applied - The date the change was applied.
- Earned - The number of hours that have been accrued as of the current date.
- Expired - The amount of time-off that has expired at year end.
- Used - The amount of used time-off for each time-off type.
- Time-Off Change Type:
  - Name - The name of the time-off change type. For example, manual adjustment or automatic accrual.
- Time-Off Type:
  - Display Name - The time-off type display name.
  - Inactive - Indicates when a time-off type is inactive.
  - Increment Unit - Indicates whether the minimum increment of time-off is in days or hours.
  - Minimum Increment - The minimum increment of time-off required for the time-off type.
  - Name - The name of the time-off type.
  - Track Only - Indicates when a time-off type is track only.

## Time-Off Analysis Workbook

SuiteAnalytics Workbook offers many workbook and dataset templates, each with predefined source data, criteria, pivot tables, and charts.

This section contains the information for the SuiteAnalytics Actual Time Analysis workbook in NetSuite. For more information about SuiteAnalytics Workbook, see the help topic [Workbook and Dataset Templates](#).

- [Time-Off Analysis Dataset](#)
- [Time-Off Analysis Workbook](#)

## Time-Off Analysis Dataset

This dataset combines fields from the Time-Off Change and Employee record types so you can assess time-off related information for your organization. It forms the source data for the [Time-Off Analysis Workbook](#).

### Dataset Configuration

The Time-Off Analysis dataset combines fields from two record types and multiple criteria filters. To edit the dataset, see the help topic [Defining a Dataset](#).

Root Record Type	Joined Record Type	Custom Formula Fields	Data Grid	Criteria Filters
Time-Off Change	Employee	(none)	The following fields are included in the dataset.	(none)

Root Record Type	Joined Record Type	Custom Formula Fields	Data Grid	Criteria Filters
			<p>Time-Off Change:</p> <ul style="list-style-type: none"> <li>■ Accrual Rate</li> <li>■ Amount</li> <li>■ Date Applied</li> <li>■ Description</li> <li>■ Employee</li> <li>■ Time-Off Change Type</li> <li>■ Time-Off Type</li> </ul> <p>Employee:</p> <ul style="list-style-type: none"> <li>■ Category</li> <li>■ Include in KPI</li> <li>■ Name</li> </ul>	

## Time-Off Analysis Workbook

With the Time-Off Analysis workbook, you can assess time-off related information for your organization. The workbook complements the Time-Off Balance Details and Time-Off Balance Summary reports by consolidating balance totals in two ready-to-use pivot tables. The pivot tables show time-off balances by employee and time-off type, and time-off activities by employee, year, and time-off type. Also, you can use the data in the workbook to create your own charts and pivots to analyze data and identify potential issues.

The following Pivot Tables and Charts are predefined in the Time-Off Analysis workbook:

- **Time-Off Balance** - Details employees' time-off balances by time-off type.
- **Time-Off Activity** - Shows a summary of employees' time-off activity by time-off type. Breaks totals down into year-end expiry, carryovers, accruals, usage, and manual adjustments.

For more information about SuiteAnalytics Workbooks, see the help topic [SuiteAnalytics Workbook Overview](#).

## Time-Off Tracking Reports

The Time-Off Tracking SuiteApp includes a set of saved searches that you can use as reports.



**Important:** The saved searches installed with the SuiteApp are not public. Administrators must first customize the saved searches to define the roles that can access each saved search and their location in the Reports menu. For more information, see [Customizing Time-Off Tracking Reports](#).

You can access the following saved searches through their own menu options at Reports > Time-Off:

- [Approved Time-Off Requests Saved Search](#)
- [Employees without Time-Off Plans Saved Search](#)
- [Pending Time-Off Requests Saved Search](#)
- [Rejected Time-Off Requests](#)
- [Time-Off Plan Assignment Saved Search](#)

- [Upcoming Approved Time-Off \(1 Month\) Saved Search](#)
- [Work Calendars Saved Search](#)

You can print and export the Time-Off Tracking saved search results, permitting the information to be shared as reports. Exporting is available to Excel, CSV, and PDF. You can find the print and export icon buttons at the top of the results list. You can also use saved search email to share complete search results with other users. To use saved search email, see the help topic [Saved Search Email](#).

For more information about saved searches, see the help topic [Saved Searches](#).

## Approved Time-Off Requests Saved Search

The Approved Time-Off Requests saved search lists active employees with approved time-off requests. By default, the results are sorted alphabetically by employee name, and then by start date and time-off type.

## Employees without Time-Off Plans Saved Search

The Employees without Time-Off Plans saved search lists any active employees who are not assigned a time-off plan. By default, the results are sorted alphabetically by employee name. In the results list, you can click the **Edit** link for each employee record to assign the employee a time-off plan.

## Pending Time-Off Requests Saved Search

The Pending Time-Off Requests saved search lists active employees with time-off requests that are pending approval. By default, the results are sorted alphabetically by employee name, and then by start date and time-off type.

## Rejected Time-Off Requests

The Rejected Time-Off Requests saved search lists active employees with rejected time-off requests. By default, the results are sorted alphabetically by employee name, and then by start date and time-off type.

## Time-Off Plan Assignment Saved Search

The Time-Off Plan Assignment saved search lists the time-off plan assigned to each active employee. By default, the results are sorted alphabetically by time-off plan, job, and employee name. In the results list, you can click the **Edit** link for each employee record to update the employee's time-off plan.

## Upcoming Approved Time-Off (1 Month) Saved Search

The Upcoming Approved (1 Month) Time-Off saved search lists active employees with approved time-off requests that have start dates within the next month. By default, the results are sorted alphabetically by employee name, and then by start date and time-off type.

## Work Calendars Saved Search

The Work Calendars saved search lists work calendar assignments of active employees. By default, the results are sorted alphabetically by work calendar and employee name. In the results list, you can click the **Edit** link for each employee record to update the employee's time-off plan.

## Customizing Time-Off Tracking Reports

You can customize the following Time-Off Tracking Reports Templates to create unique saved searches:

- TEMPLATE Approved Time-Off Requests
- TEMPLATE Pending Time-Off Requests
- TEMPLATE Rejected Time-Off Requests
- TEMPLATE Upcoming Approved Time-Off (1 Month)
- TEMPLATE Time-Off Plan Assignment
- TEMPLATE Employees without Time-Off Plans
- TEMPLATE Work Calendars

## Customizing a Time-Off Tracking Report Template

### To customize a time-off tracking report template:

1. Go to Lists > Search > Saved Searches.
2. Beside the template that you want to customize, click **Edit**.
3. In the **Search Title** field, remove “TEMPLATE” from the name of the search, and enter a new name for the search if necessary.
4. In the **Audience** subtab, from the **Roles** list, select the roles that should have access to the saved search.
5. If necessary, update the settings in any of the other tabs (for example, you can update search criteria in the **Criteria** subtab).
6. Click **Save As**.

## Creating a Center Category for the Saved Search

To allow access to the time-off tracking reports from menu links, you create a center category.

### To create a center category for the saved search:

1. Go to Customization > Centers and Tabs > Center Categories > New.
2. Set the following values:
  - Set the **Label** field to **Time-Off**.
  - In the **Center Type** list, select **Classic Center**.
  - In the **Center Tab** list, select **Reports**.
3. In the table, depending on the report that was used to create the saved search, set the following values:

For each of the following reports:	Set the Link column to:	Set the Label column to:
Approved Time-Off Requests	Approved Time-Off Requests Results	Approved Time-Off Requests
Pending Time-Off Requests	Pending Time-Off Requests Results	Pending Time-Off Requests
Rejected Time-Off Requests	Rejected Time-Off Requests Results	Rejected Time-Off Requests

Upcoming Approved Time-Off (1 Month)	Upcoming Approved Time-Off (1 Month) Results	Upcoming Approved Time-Off (1 Month)
Time-Off Plan Assignment	Time-Off Plan Assignment Results	Time-Off Plan Assignment
Employees without Time-Off Plans	Employees without Time-Off Plans Results	Employees without Time-Off Plans
Work Calendars	Work Calendars Results	Work Calendars

4. Click **Save**.

You can now access the reports at Reports > Time-Off.

## Recruiting Reports

The Recruiting Reports SuiteApp provides job requisition reports that are available as NetSuite saved searches. When customized, the saved searches can be accessed from a unique Reports menu location.



**Note:** Currently, the Recruiting Reports SuiteApp supports only the US English language.

### Prerequisite

Before you install the Recruiting Reports SuiteApp, go to Setup > Company > Enable Features. Click the **Employees** subtab and check the **Job Requisitions** box, under HR Information System.

### Installation

To install Recruiting Reports, go to Customization > SuiteBundler > Search & Install Bundles.

Use the following information to search for the SuiteApp:

- Bundle Name — **Recruiting Reports**
- Bundle ID — **167235**

Recruiting Reports is a managed bundle and is automatically updated whenever there are updates. These issue fixes and enhancements are available after the SuiteApp is updated in your account.

For more information about installing SuiteApps, see the help topic [Installing a Bundle](#).

### Recruiting Reports Saved Searches



**Important:** The saved searches installed with the SuiteApp are not public. Administrators must first customize the saved searches to define the roles that can access each saved search and their location in the Reports menu. For more information, see [Customizing Recruiting Reports](#).

You can access the following saved searches through their own menu options at Reports > Recruiting:

- **Open Job Requisitions** - This saved search lists active job requisition records that have no close dates and with Status set to **Open**. By default, the results are sorted by target hire date and job.

- **Pending Job Requisitions** - This saved search lists active job requisition records that have no close dates and with Status set to **Pending Approval**. By default, the results are sorted by target hire date and job.
- **Closed Job Requisitions** - This saved search lists active job requisition records that have close dates and with Status set to **Closed**. By default, the results are sorted by close date and job.
- **Filled Job Requisitions** - This saved search lists active job requisition records that have Status set to **Filled**. By default, the results are sorted by target hire date and job.
- **On-Hold Job Requisitions** - This saved search lists active job requisition records that have no close dates and with Status set to **On-Hold**. By default, the results are sorted by target hire date and job.
- **Overdue Job Requisitions** - This saved search lists active job requisition records that have no close dates. The Status must be **Open**, **Pending Approval**, or **On-Hold**. By default, the results are sorted by target hire date, close date, and job.



**Note:** From the results list of any recruiting report saved search, you can view a job requisition record by clicking **View** or Job Requisition ID.

You can print and export the saved search results, permitting the information to be shared as reports. Exporting is available to Excel, CSV, and PDF. You can find the print and export icon buttons at the top of the results list. You can also use saved search email to share complete search results with other users. To use saved search email, see the help topic [Saved Search Email](#).

For more information about saved searches, see the help topic [Saved Searches](#).

## Customizing Recruiting Reports

You can customize the following Recruiting Reports Templates to create unique saved searches:

- TEMPLATE Open Job Requisitions
- TEMPLATE Pending Job Requisitions
- TEMPLATE Closed Job Requisitions
- TEMPLATE Filled Job Requisitions
- TEMPLATE On-Hold Job Requisitions
- TEMPLATE Overdue Job Requisitions

## Customizing a Recruiting Report Template

Use the following procedure to customize a recruiting report template.

### To customize a recruiting report template:

1. Go to Lists > Search > Saved Searches.
2. Beside the template that you want to customize, click **Edit**.
3. In the **Search Title** field, remove TEMPLATE from the name of the search, and then enter a new name for the search.
4. In the **Audience** subtab, from the **Roles** list, select the roles that should have access to the saved search.
5. If necessary, update the settings in any of the other subtabs (for example, you can update search criteria in the **Criteria** subtab).

6. Check the **Show in Menu** box.
7. Click **Save As**.

## Creating a Center Category for the Saved Search

To grant access to the recruiting reports from menu links, you create a center category.

### To create a center category for the saved search:

1. Go to Customization > Centers and Tabs > Center Categories > New.
2. Set the following values:
  - Set the **Label** field to **Recruiting**.
  - In the **Center Type** list, select **Classic Center**.
  - In the **Center Tab** list, select **Reports**.
3. In the table, depending on the report that was used to create the saved search, set the following values:

For each of the following reports:	Set the Link column to:	Set the Label column to:
Open Job Requisitions	Open Job Requisitions Results	Open Job Requisitions
Pending Job Requisitions	Pending Job Requisition Results	Pending Job Requisitions
Closed Job Requisitions	Closed Job Requisition Results	Closed Job Requisitions
Filled Job Requisitions	Filled Job Requisition Results	Filled Job Requisitions
On-Hold Job Requisitions	On-Hold Job Requisition Results	On-Hold Job Requisitions
Overdue Job Requisitions	Overdue Job Requisitions Results	Overdue Job Requisitions

4. Click **Save**.

You can now access the reports at Reports > Recruiting.

## Employee Change History Report

The Employee Change History report provides an efficient way to audit changes to employee data. You can use this report to audit changes across many employees within a specific date range or for specific fields. For example, HR and Payroll personnel can use the Employee Change History report to access the following information:

- An HR Administrator wants to see all changes to employee data to determine what information was changed and when.
- A Payroll Administrator wants to see the changes made to employee payroll settings between the first and last day of the year. This information helps to answer questions from employees and tax agencies related to payroll processing and tax filing.

To access the report, go to Reports > Employees/HR > Employee Change History.

You can customize this report in the Report Builder by clicking **Customize** on the results page. For more information, see the help topics [Filtering Data on Reports](#) and [Adding, Removing, or Reordering Report Columns](#).

**Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

## Employee Saved Search Reports

The Employee Reports SuiteApp requires SuitePeople HR. It allows access to employee reports that appear as NetSuite saved searches. When customized, the saved searches can be found in a unique Reports menu location. For more information, see [SuitePeople Overview](#)

**Note:** Currently, the Employee Reports SuiteApp supports only US and UK English languages.

## Prerequisites

Ensure the required features are enabled to install the Employee Reports SuiteApp (bundle ID 167330). Go to Setup > Company > Setup Tasks > Enable Features.

- On the **Employees** subtab, under HR Information System, check each of the boxes for **Compensation Tracking**, **Job Management**, and **Termination Reason Tracking**.
- On the **SuiteCloud** subtab, under SuiteScript, check the **Server SuiteScript** box.

## Installation

To install Employee Reports, go to Customization > SuiteBundler > Search & Install Bundles.

Use the following information to search for the SuiteApp:

- Bundle Name — **Employee Reports**
- Bundle ID — **167330**

Employee Reports is a managed bundle and is automatically updated. See the help topic [Installing a Bundle](#) for more information.

## Accessing Employee Saved Search Reports

**Important:** The saved searches installed with the SuiteApp are private. An Administrator must customize the saved searches to define the roles that can access saved searches and their location in the Reports menu. For more information, see [Customizing Employee Reports](#).

Access the following saved searches through their own menu options at Reports > Employees/HR:

Saved Search	Required Feature
Average Salary by Ethnicity Saved Search	Compensation Tracking
Average Salary by Gender Saved Search	Compensation Tracking
Average Salary by Job Saved Search	Job Management Compensation Tracking

Saved Search	Required Feature
Employee Birthday Report Saved Search	–
Employee Birthdays by Month Saved Search	–
Employee Roster Saved Search	–
Employees by Age Range Saved Search	–
Employees by Base Wage Type Saved Search	Compensation Tracking
Employees by Ethnicity Saved Search	–
Employees by Gender Saved Search	–
Employees by Hire Date Saved Search	–
Employees by Job Saved Search	Job Management
Employees With Incomplete Compensation Data Saved Search	Compensation Tracking
Employees Without Supervisors Saved Search	–
New Hires (Last 90 Days) Saved Search	–
New Hires by Ethnicity (last 12 months) Saved Search	–
New Hires by Gender (last 12 months) Saved Search	–
Termination Reasons (Trends) Saved Search	Termination Reason Tracking
Upcoming New Hires Saved Search	–
Upcoming Terminations Saved Search	–

Print and export the saved search results. Exporting is available to Excel, CSV, and PDF. The print and export buttons are at the top of the results list. For more information, see the help topic [Exporting Search Results](#).

Use saved search email to share complete search results with other users. See the help topics [Saved Search Email](#) and [Saved Searches](#).

 **Note:** When any of the Employee Reports saved search returns a single result, NetSuite opens the record if the user has permission to view it. To return search results as a list with only one record in the results, go to Set Preferences > Analytics > Search. Check the **Show List When Only One Result** box, and then save.

## Average Salary by Ethnicity Saved Search

This search lists the average annual base wages of active employees by ethnic group. Results are sorted by ethnic group, average base wage, and employee count. In the results list, click each of the ethnicity name to view more details.

## Average Salary by Gender Saved Search

This search lists the average annual base wages of active employees by gender group. Results are sorted by gender group, average base wage, and employee count. In the results list, click each of the gender name to view more details.

## Average Salary by Job Saved Search

This search lists the average annual base wages of active employees by job group. Results are sorted by job group, average base wage, and employee count. In the results list, click each of the job name to view more details.

## Employee Birthday Report Saved Search

This search lists all active employees with their birth date, age, and other employee details. Results are sorted by birth date and then alphabetically by employee name.

## Employee Birthdays by Month Saved Search

This search lists the number of active employees born in each calendar month. In the results list, click the name of each calendar month to view more details.

## Employee Roster Saved Search

This search lists all active employees in ascending alphabetical order by last name. Results includes job, supervisor, class, department, location, subsidiary, and country details for each employee. The employee name is linked to the employee record.

## Employees by Age Range Saved Search

This search lists the number of active employees by age range. In the results list, click the name of each age range group to view more details.

## Employees by Base Wage Type Saved Search

This search lists the number of active employees by base wage type. In the results list, click the name of each base wage type to view more details.

## Employees by Ethnicity Saved Search

This search lists the number of active employees by ethnic group. In the results list, click the name of each ethnic group to view more details.

## Employees by Gender Saved Search

This search lists all active employees sorted by gender and hire date.

## Employees by Hire Date Saved Search

This search lists all active employees by hire date, from the most recent to the least recent date of hire.

## Employees by Job Saved Search

This search lists the number of active employees by job. In the results list, click the name of each job to view more details.

## Employees With Incomplete Compensation Data Saved Search

This search lists active employees who are missing at least one of the following information in their employee record:

- base wage
- base wage type
- compensation currency

In the results list, the employee name is linked to the employee record.

## Employees Without Supervisors Saved Search

This search lists active employees without a supervisor on record. In the results list, the employee name is linked to the employee record.

## New Hires (Last 90 Days) Saved Search

This search lists active employees hired within the last 90 days. Results are sorted by hire date, from the most recent to the least recent date of hire. Results are sorted by hire date, from the most recent to the least recent date of hire.

## New Hires by Ethnicity (last 12 months) Saved Search

This search lists the number of active employees from each ethnic group who have been hired within the last 12 months. In the results list, click the name of each ethnic group to view more details. In the detailed report, results are sorted by hire date, from the most recent to the least recent date of hire.

## New Hires by Gender (last 12 months) Saved Search

This search lists the number of active employees from each gender group who have been hired within the last 12 months. In the results list, click the name of each gender group to view more details. In the detailed report, results are sorted by hire date, from the most recent to the least recent date of hire.

## Termination Reasons (Trends) Saved Search

This search lists reasons cited by inactive employees for terminating their employment, and the number of times each reason is cited. In the results list, click the name of each termination reason to view more details.

## Upcoming New Hires Saved Search

This search lists employees with hire dates that after the current date. Results are sorted by hire date, job, and location.

## Upcoming Terminations Saved Search

This search lists active employees with termination or release dates that are after the current date. Results are sorted by termination date, job, and location.

## Customizing Employee Reports

You can customize the following Employee Reports Templates to create unique saved searches:

- TEMPLATE Average Salary by Ethnicity
- TEMPLATE Average Salary by Gender
- TEMPLATE Average Salary by Job
- TEMPLATE Employee Birthday Report
- TEMPLATE Employee Birthdays by Month
- TEMPLATE Employee Roster
- TEMPLATE Employees by Age Range
- TEMPLATE Employees by Base Wage Type
- TEMPLATE Employees by Ethnicity
- TEMPLATE Employees by Gender
- TEMPLATE Employees by Hire Date
- TEMPLATE Employees by Job
- TEMPLATE Employees with Incomplete Compensation Data
- TEMPLATE Employees without Supervisors
- TEMPLATE New Hires (Last 90 Days)
- TEMPLATE New Hires by Ethnicity (Last 12 months)
- TEMPLATE New Hires by Gender (Last 12 months)
- TEMPLATE Termination Reasons (Trends)
- TEMPLATE Upcoming New Hires
- TEMPLATE Upcoming Terminations

## Customizing an Employee Report Template

Use the following procedure to customize an employee report template.

### To customize an employee report template:

1. Go to Lists > Search > Saved Searches.
2. Beside the template that you want to customize, click **Edit**.

3. In the **Search Title** field, remove TEMPLATE from the name of the search, and then enter a new name for the search.
4. In the **Audience** subtab, from the **Roles** list, select the roles that should have access to the saved search.
5. If necessary, update the settings in any of the other tabs (for example, you can update search criteria in the **Criteria** subtab).
6. Click **Save As**.



**Tip:** To complete the next set of steps, after you create your new saved search, copy its ID. On the Saved Searches page, the ID appears in the **ID** column, beside the name of the saved search.

## Adding a Menu Link for a Saved Search

After you customize a template and create a new saved search, you can add a menu link to access the saved search.

### To add a menu link for a saved search:

1. Go to Customization > Scripting > Scripts.
2. Beside **ER Redirect Su**, click **View**.
3. Click the **Deployments** subtab. For each of the deployments that correspond to the employee report templates that you customized, do the following:
  - a. Click the deployment. For example, if you created a customized saved search based off of the Employee Birthday Report, click the **Employee Birthday** deployment.
  - b. Click **Edit**.
  - c. Click the **Parameters** subtab. In the **View** field, enter the ID for the corresponding saved search that you customized earlier. For example, the ID for the customized Employee Birthday Report might be `customsearch_er_employee_bday_2`.
4. In the **Audience** subtab, from the **Roles** list, select the roles that should have access to the saved search.
5. Check the **Deployed** box.
6. Click **Save**.



**Note:** To find the ID for the saved search, go to Lists > Search > Saved Searches. The ID appears beside the saved search in the ID column.

You can now find the customized saved search by going to Reports > Employees/HR.

## Employee Bonus History and Current Compensation Workbook

SuiteAnalytics Workbook offers many workbook and dataset templates, each with predefined source data, criteria, pivot tables, and charts.

This section contains the information for the SuiteAnalytics Employee Bonus History and Current Compensation workbook in NetSuite. For more information about SuiteAnalytics Workbook, see the help topic [Workbook and Dataset Templates](#).

## Employee Bonus History and Current Compensation Dataset

This dataset combines fields from the Employee and Bonus record types. It lets you view a summary of employees' current base compensation and a history of employees' bonuses. It forms the source data for the [Employee Bonus History and Current Compensation Workbook](#).

### Dataset Configuration

As you work with this workbook template, consider that the Advanced Employee Permissions feature can impact the employee record fields that you have access to. The Advanced Employee Permissions feature does not affect fields on the bonus record. Rather, employee and subsidiary restrictions that are applied to your role can affect your access to bonus record information.

Root Record Type	Joined Record Type	Custom Formula Field	Data Grid	Criteria Filters
Employee	Bonus	(none)	<p>The following fields are included in the dataset.</p> <p>Employee:</p> <ul style="list-style-type: none"> <li>■ Base Wage</li> <li>■ Base Wage Type</li> <li>■ Compensation Currency</li> <li>■ Entity ID</li> </ul> <p>Bonus:</p> <ul style="list-style-type: none"> <li>■ Amount</li> <li>■ Award Date</li> <li>■ Bonus Type</li> <li>■ Currency</li> </ul>	(none)

## Performance Management Saved Searches and Workbooks

The Performance Management feature includes saved searches and a workbook that you can use to retrieve, present, and analyze your performance management data. The following saved searches and workbook are included with the Performance Management feature:

- [Performance Management Saved Searches](#)
- [Performance Management Workbook](#)

# Compliance

NetSuite provides the following features and SuiteApps that enable you to comply with government and industry requirements:

- [Workplace Incident Tracking](#)
- [Affordable Care Act \(ACA\) Reporting](#)
- [Government-Issued ID Tracking](#)
- [Benefits Tracking](#)
- [Workforce Case Interaction](#)

# Workplace Incident Tracking



**Important:** This feature requires SuitePeople. For more information, see [SuitePeople Overview](#).

The Health and Safety SuiteApp enables you to record and report on health and safety incidents in the workplace. Using this SuiteApp's reporting features, you can generate any reports that are required to document your compliance with regulatory requirements in your jurisdiction. This SuiteApp provides three versions of the workplace incident form:

- Occupational Safety and Health Administration (OSHA) 301 form for companies in the United States
- Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) form for companies in the United Kingdom
- General incident reporting form for other jurisdictions

For more information about this SuiteApp, see the following topics:

- [Set up the Health and Safety SuiteApp](#)
- [Working With Workplace Incidents](#)
- [Adding a Workplace Incident](#)
- [Generating OSHA Workplace Incident Logs and Summaries](#)

## Set up the Health and Safety SuiteApp



**Important:** This feature requires SuitePeople. For more information, see [SuitePeople Overview](#).

To set up the Health and Safety SuiteApp, see the following topics:

- [Prerequisites for the Health and Safety SuiteApp](#)
- [Install the Health and Safety SuiteApp](#)
- [Health and Safety SuiteApp Permissions](#)
- [Enabling the Workplace Incident Forms](#)
- [Setting the Default Folder for Attachments](#)
- [Configure Your Company Settings for Incident Tracking](#)



**Note:** Currently, the Health and Safety SuiteApp supports only the US English language.

## Prerequisites for the Health and Safety SuiteApp

Before you install the Health and Safety SuiteApp, complete the following prerequisites:

- Upgrade to NetSuite 2016.2 or later versions that support SuiteScript 2.0.
- Enable the features in the following table:

Subtab	Feature	Description
SuiteCloud	Custom Records	Lets you access custom records provided by the SuiteApp
	Server SuiteScript	Lets you run the scripts provided by the SuiteApp

## Install the Health and Safety SuiteApp

Install the Health and Safety SuiteApp:

- Bundle Name: **Health and Safety**
- Bundle ID: 109485

This is a managed bundle and is automatically updated whenever there are updates. These issue fixes and enhancements are available after the SuiteApp is updated in your account.

For more information about installing SuiteApps, see the help topic [Installing a Bundle](#).

## Health and Safety SuiteApp Permissions

Assign the permissions in the table to custom roles that will use the SuiteApp.

Subtab	Permission	Permission Access Level
Permissions > Lists	Documents and Files	Full
	Employee Record	Full
	Locations	Full
	Notes Tab	Full
	Perform Search	Full
	Subsidiaries	Full
Permissions > Setup	Custom Lists	Full
Permissions > Custom Record	Health and Safety Preferences	Full
	Incident Report Definition	Full
	Incident Report History	Full
	Workplace Incident	Full

Add the standard fields in the table to custom Advanced Employee Permissions that you want to be able to use the SuiteApp. For more information, see [Adding Standard Fields to Custom Advanced Employee Permissions](#).

Record Type	Field
Employee	Address
	Birth Date
	Email
	Employee Type
	First Name
	Gender
	Hire Date

Record Type	Field
	Is Inactive
	Job Title
	Last Name
	Middle Name
	Phone
	Termination/Release Date

## Enabling the Workplace Incident Forms

The Healthy and Safety SuiteApp comes with three workplace incident reporting forms:

- Accident Record: For Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) compliance. Use this form for workplaces in the United Kingdom.
- OSHA 301: For Occupational Safety and Health Administration (OSHA) compliance. Use this form for workplaces in the United States.
- General: For all other jurisdictions.

You can choose to enable one or more of these forms.

### To enable workplace incident forms:

1. Go to Setup > Health and Safety > Preferences.
2. On the Health and Safety Preferences page, click **Edit**.
3. Click the form you want to enable. To select more than one form, press and hold the Ctrl button and then click the forms.
4. Click **Save**.

## Setting the Default Folder for Attachments

With the Health and Safety SuiteApp, you can attach files with supporting information when you complete workplace incident forms. You can select the default folder where these attachments are saved.

### To set the default folder for attachments:

1. Go to Setup > Health and Safety > Preferences.
2. On the Health and Safety Preferences page, click **Edit**.
3. From the Default Folder list, select the folder where you want to save the attachments.
4. Click **Save**.

## Configure Your Company Settings for Incident Tracking

Before you can use the Health and Safety SuiteApp in NetSuite, ensure that your industry information is included in your company settings.

If you use NetSuite OneWorld, NetSuite uses the industry information from the Company Information page for your top-level or root subsidiary. If your company has subsidiaries, this information must be accurate for each subsidiary. When you first configure your industry information in your subsidiaries, the company-level industry information appears in the subsidiary information by default. You can customize this information.

### To add industry information for your company:

1. Go to Setup > Company > Company Information.
2. In the **Industry Description** field, enter a description of your industry. This can be any text, but should be as informative as possible for incident report logging compliance.
3. Select a type from the **Industry Classification Type** list: **SIC – Standard Industrial Classification** or **NAICS – North American Industry Classification System**. Based upon your industry standards, you should know which type your company should use.
4. Enter the appropriate number in the **Industry Classification Number** field. Based upon your industry standards, you should know which classification number your company should use.
5. Click **Save**.

### To add industry information for your subsidiaries (OneWorld only):

1. Go to Setup > Company > Subsidiaries.
2. Click **Edit** beside the subsidiary for which you want to change industry information. If you have already set these fields in your company settings, these fields are filled with those values by default. You can keep those values or change them as needed.
3. If you want to change this information, in the **Industry Description** field, enter a description of your industry. This can be any text, but should be as informative as possible for incident report logging compliance.
4. Select a type from the **Industry Classification Type** list: **SIC – Standard Industrial Classification** or **NAICS – North American Industry Classification System**. Based upon your industry standards, you should know which type your company should use.
5. Enter the appropriate number in the **Industry Classification Number** field. Based upon your industry standards, you should know which classification number your company should use.
6. Click **Save**.
7. Add industry information for any other subsidiaries.

## Working With Workplace Incidents



**Important:** This feature requires SuitePeople. For more information, see [SuitePeople Overview](#).

### To view the list of incidents:

1. Using the Classic Center, go to Lists > Workplace Incidents > Workplace Incident List. The Workplace Incident List page shows all of the incidents that your company has logged.  
If you are using the Accounting Center, go to Payroll and HR > Lists > Workplace Incidents > Workplace Incident List.
2. To see all inactive incident records, check the **Show Inactives** box.
3. To view an individual incident record, click **View** beside it.

## Deleting a Workplace Incident

As an account administrator, you can delete an incident record. However, in most cases, you should make the record inactive instead. Only account administrators can delete an incident.

Only delete an incident record if you are certain that it is not required. For example, you created an incident record more than one time for the same incident. You can delete the incident record. Another example is that you decided an incident does not meet regulatory reporting requirements. You can delete the incident record.

### To delete an incident:

1. Go to Lists > Employees > Workplace Incidents.
2. Click **Edit** beside the incident you want to delete.
3. Select **Delete** from the **Actions** menu.
4. When prompted to confirmation the deletion, click **OK**.

## Adding a Workplace Incident



**Important:** This feature requires SuitePeople. For more information, see [SuitePeople Overview](#).

You add a workplace incident when an incident occurs that meets your regulatory requirements. You can add an incident from the Workplace Incident List page or from the employee record of the employee to whom the incident occurred. You can also add a new incident with information copied from an existing incident. You do this while viewing the existing incident.

### To add an incident:

1. From the Classic Center, go to Lists > Workplace Incidents.  
From the Accounting Center, go to Payroll and HR > Lists > Workplace Incidents.  
Click **New Workplace Incident**. On the Select a form type page, click one of the form types:  
**Accident Report (RIDDOR)**, **OSHA 301**, or **General**.  
Alternatively, go to Lists > Employees > Employees. Click **Edit** or **View** beside the employee involved in the incident. On the **Human Resources** subtab, on the **Workplace Incidents** subtab, click **New Workplace Incident**.
2. To modify the details of an existing incident record, go to Lists > Workplace Incidents > Workplace Incident List. Click **Edit** next to the name of the incident.

### To add an incident from an existing incident:

1. From the Classic Center, go to Lists > Workplace Incidents.  
From the Accounting Center, go to Payroll and HR > Lists > Workplace Incidents.
2. Click **View** beside the incident whose details you want to copy.
3. On the **Actions** menu, click **Make Copy**.

For more information about adding a workplace incident, see the following topics:

- [Adding a General Workplace Incident](#)

- Adding OSHA 301 Workplace Incidents
- Adding a RIDDOR Workplace Incident

## Adding a General Workplace Incident

Use the following procedures to add a general workplace incident.

### To add a general workplace incident:

1. From the Classic Center, go to Lists > Workplace Incidents.  
From the Accounting Center, go to Payroll and HR > Lists > Workplace Incidents.
- Click **New Workplace Incident**. On the Select a form type page, click **General**. Alternatively, go to Lists > Employees > Employees. Click **Edit** or **View** beside the employee involved in the incident. On the **Human Resources** subtab, on the **Workplace Incidents** subtab, click **New Workplace Incident**. From the **Form Type** list, select **General**. The Workplace Incident page displays the General form fields.
2. Enter a **Case Number**. Note that the **Workplace Incident ID** is a unique number generated by NetSuite when you create the incident.
3. Select a location from the **Location** list. This is the list of locations defined in your company information.
4. If you want this incident to be inactive, select the **Workplace Incident is Inactive** box. This affects how the incident appears on the Incidents list.
5. Enter the date when this form is being completed in the **Date of Form Completion** field. It defaults to today, but you can change it. For example, you are entering information from a paper form that has already been filled out. You might specify the date shown on that form.
6. Enter the date when this incident was first reported in the **Date Incident Was First Reported** field.

### To add follow-up contact information and witnesses:

1. Select the employee filling out this form in the **Form Completed By** list. It defaults to your name, but you can select another employee. The person's email address and phone number are sourced from the employee record, but you can edit them.
2. Enter the name of the person first reporting the incident in the **Incident Was First Reported By** field. Enter that person's email address and phone number.
3. Select the person the **Incident Was First Reported To** from the list. This person must be an employee. The person's email address and phone number are sourced from the employee record, but you can edit them.
4. Select a contact person from the **Contact This Person For More Information On The Incident** list. This person must be an employee. The person's email address and phone number are sourced from the employee record, but you can edit them.
5. Enter **Name**, **Email** address, and **Phone** number for up to two witnesses to the incident.

### To add incident details:

1. Enter the **Date of Workplace Incident**.
2. Enter the **Time of Workplace Incident** or check the **Time Cannot Be Determined** box.
3. Enter the **Time Employee Began Work on Day Incident Occurred**.

4. Select the **Severity** of the incident from the list.
5. Select the **Impact to Property** of the incident from the list.
6. Describe as many aspects of the incident as you can, using the categories shown:
  - **Describe in Detail What Happened**
  - **Describe the Events Leading Up to the Injury**
  - **Describe the Injury**
  - **Describe Where the Incident Occurred**
  - **Address Where Incident Occurred**
  - **Additional Comments**

#### To add employee information:

1. Select the employee from the **Full Name** list. Most of the fields in this section are automatically sourced from the employee record.
2. If values in those sourced fields are not correct, edit them as needed.
3. Enter the employee's **Medical Insurance Number**.

#### To enter work impact:

1. If the employee missed work because of the incident, check the **Incident Resulted in Days Away From Work** box.
2. If you checked this box, enter the **Number of Days** away from work and the **Date Returned to Work**.

#### To add medical care:

1. Enter the **Name of Physician or Other Health Care Professional**.
2. If the employee received treatment at a hospital or any location other than the worksite, check the **Treatment Was Given Away From Worksite** box. Enter information in the **Date of First Visit to Facility**, **Name of Facility**, and **Facility Address**.
3. If the **Employee Was Treated in an Emergency Room**, check the box.
4. If the **Employee Was Hospitalized Overnight as an In-Patient**, check the box.



**Note:** When you are finished filling out all of the information about the incident, click **Save**.

## Adding OSHA 301 Workplace Incidents

OSHA 301 forms are used to report workplace incidents and injuries for companies in the United States. A workplace incident is added any time an incident occurs that meets your regulatory requirements. You can add an incident from the Workplace Incident List page or directly from the employee record.

#### To add an OSHA 301 workplace incident:

1. Go to Lists > Workplace Incidents > New.
2. On the Select a form type page, click **OSHA 301**.
3. Note that the **Workplace Incident ID** is a unique number generated when the incident is created.

4. Select a location from the **Location** list.
5. Enter the date in the **Date of Form Completion** field. It defaults to today, but you can change it. For example, you are entering information from a paper form that has already been filled out. You might specify the date shown on the form.

### To add primary information:

1. Select the name of the employee filling out this incident form from the **Completed By** list.
2. Enter the phone number and job title of the employee completing this form in the **Phone** and **Title** fields.

### To add employee information:

1. Select the employee's name from the **Full Name** list. The fields in this section are automatically sourced from the employee record, but you can edit them.
2. To hide the name of the employee in the OSHA 301 log, check the **This is a Private Case** box. When this box is checked, the words "Privacy Case" appear in the log instead of the employee's name. After reading the notification popup, click **OK**.

### To add physician or other health care professional information:

1. Enter the appropriate name in the **Name of Physician or Other Health Care Professional** field.
2. If the employee was treated at a facility away from the workplace, check the **Treatment was Given Away from Worksite** box. Then, enter the name and address of the facility.
3. If required, check the appropriate box if the employee was treated in an emergency room or if they were hospitalized as an in-patient.

### To add case information:

1. In the **Case Number** field, enter any other tracking number that your organization has assigned to this incident.
2. Enter the time the employee started work on the day the incident occurred in the **Time Employee Began Work on Day Incident Occurred** field.
3. Select the **Date of the Injury or Illness**. The current date is selected by default, but you can select a different date.
4. In the **Time of Incident** field, enter the time when the incident occurred. If this is not known, check the **Time Cannot Be Determined** box.
5. Select the type of injury caused by the incident from the **Injury or Illness Type** list.
6. Select the classification from the **Case Classification** list.
7. If required, enter the number of days that the employee was away from work in the **Number of Days** field.



**Note:** If this workplace incident caused an employee death, read and follow the instructions in the information box that appears.

8. Describe as many aspects of the incident as you can, using the following categories:
  - What was the injury or illness?
  - What occurred?
  - What was the employee doing in the moments before the incident occurred?

- What object or substance directly harmed the employee?
- Where did the event occur?

### To add attachments:

1. If you have any files with supporting information, such as pictures, click the **Attachments** subtab.
2. Select a file from the **Attach File** list. To upload a file to attach, click **New**.
3. Click **Add**.

### To add notes:

1. To add a note to the incident form, click the **Notes** subtab.
2. Enter the note information.



**Note:** When you are finished filling out all of the information about the incident, click **Save**.

## Adding a RIDDOR Workplace Incident

You add a workplace incident when an incident occurs to an employee that meets your regulatory requirements. If your workplace is in the United Kingdom, you are governed by the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR). You can add an incident from the Workplace Incident List page or from the employee record of the employee to whom the incident occurred. You can also add a new incident with information copied from an existing incident. You do this while viewing the existing incident.

When you are finished filling the information about the incident, click **Save**. This will save all information currently entered. If you are uncertain about some of the information, you can save an incomplete incident record and edit it later.

### To add a RIDDOR workplace incident:

1. From the Classic Center, go to Lists > Workplace Incidents.  
From the Accounting Center, go to Payroll and HR > Lists > Workplace Incidents.  
Click **New Workplace Incident**. On the Select a form type page, click **Accident Record**. Alternatively, go to Lists > Employees > Employees. Click **Edit** or **View** beside the employee involved in the incident. On the **Human Resources** subtab, on the **Workplace Incidents** subtab, click **New Workplace Incident**. From the **Form Type** list, select **Accident Record**. The Workplace Incident page displays the form fields for a RIDDOR Accident Report.
2. Enter the **Accident Book Number** and the Accident Record Report Number. You can find these numbers in the hard-copy Accident Book you would have used to first record the incident. Note that the **Workplace Incident ID** is a unique number generated by NetSuite when you create the incident.
3. Select a location from the **Location** list. This is the list of locations defined in your company information.
4. Enter the date when this form is being completed in the **Date of Accident Record Completion** field. It defaults to today's date, but should be set to the date when the incident was recorded in the hard-copy Accident Book.
5. Enter the date when this incident was first reported in the **Date When Incident Was First Reported to the Organisation** field.

6. If you want this incident to be inactive, select the **Workplace Incident is Inactive** box. This affects how the incident appears on the Incidents list.

#### To add RIDDOR reporting details:

1. If the type of incident fits the criteria set by RIDDOR, check the **Incident is Reportable Under RIDDOR** box.
2. If you checked this box, enter the **Person Who Reported** the incident and the **Date Reported to HSE**. Select the **Method of Reporting** from the list.

#### To add incident details:

1. Enter the date on which the incident occurred in the **Date of Incident** field. This is not necessarily the date on which you are entering this incident in the Accident Book or NetSuite.
2. Enter the time at which the incident occurred in the **Time of Incident** field.
3. Select the type of incident from the **Incident Type** list. Note that an incident does not necessarily have resulted in an injury to be reportable.
4. Enter the immediate cause in the **Cause of the Incident** field.
5. Enter where in your workplace (such as the physical area, department, or room) the incident occurred in the **Location of the Incident** field.
6. If the incident resulted in an injury, enter information in the **If An Injury Occurred, Describe the Injury** field.

#### To add work impact:

1. If the affected person missed days of work because of the incident, check the **Incident Resulted in Days Away from Work** box. If you selected Death as the Type of Incident, this setting is not available.
2. If you checked this box, enter the **Number of Days** the person missed from work and the **Date Returned to Work**.

#### To add attachments:

1. If you have any files with supporting information, such as pictures, click the **Attachments** subtab.
2. Select a file from the **Attach File** list. To upload a file to attach, click **New**.
3. Click **Add**.

#### To add affected person information:

1. To give your organization's safety representative access to the affected person's personal information, do the following. Check the **Affected Person Has Given Consent to Disclose Their Personal Information to Safety Representative** box. Only check this box if the affected person has given consent.
2. Enter the name of the affected person in one of the following ways:
  - If the affected person is an employee, select their name from the **Full Name** list. The person's **Occupation, Email, Phone, Address**, and **Postcode** are sourced from the employee record.
  - If the person is not an employee, check the **Affected Person is not an Employee** box. Enter their name in the **Full Name** field and complete the rest of the fields in this section.

## To add follow-up contact information:

1. In the **Accident Report Completed By** field, enter the name of the person completing this form.
2. Enter the **Occupation, Address, Email, Phone**, and **Postcode** for this person.
3. Select a contact person from the **Contact This Person For More Information on the Incident** list. This person must be an employee of your organization.
4. The **Email** and **Phone** fields for this contact person are sourced from the employee record.

## To add medical care information:

1. If the affected person had to be treated in a hospital, check the **Affected Person Was Treated in Hospital** box.
2. If you checked this box, enter:
  - **Name of Physician or Other Health Care Professional**
  - **Date of First Visit to Facility**
  - **Name of Facility**
  - **Facility Address**

## To add witnesses:

1. Enter the **Name** of up to two witnesses to the incident.
2. Enter the **Email** and **Phone** number of the witnesses.

## To add notes:

1. To add a note to the incident form, click the **Notes** subtab.
2. Click **New Note**. Enter the note information.



**Note:** When you are finished filling out all of the information about the incident, click **Save**.

# Generating OSHA Workplace Incident Logs and Summaries



**Important:** This feature requires SuitePeople. For more information, see [SuitePeople Overview](#).

If your workplace is located in the United States, you must periodically generate logs and summaries for Occupational Safety and Health Administration (OSHA) compliance. An OSHA 300 log is a list of all of your incidents that match your filter criteria. An OSHA 300 summary is a compilation of statistics and information about your incident history. If you are located in the United Kingdom or another non-U.S. jurisdiction, these reports are not available.

## To generate an OSHA 300 log:

1. Go to Reports > Workplace Incidents > OSHA 300 Log. The OSHA's Form 300 Log of Work-Related Injuries and Illnesses page appears.
2. From the **Location** list, select a location.

3. From the **Generate Report For** list, select the year to include in the report.
4. From the **Generate As** list, select the output format you want to generate: **PDF** or **XML Spreadsheet**.
5. Enter the information you want to appear on the log:
  - **Establishment Name**
  - **City**
  - **State**
6. Click **Generate**.

NetSuite generates the log and saves it to the specified file format.

### To generate an OSHA 300A summary:

1. Go to Reports > Workplace Incidents > OSHA 300A Summary. The OSHA's Form 300A Summary of Work-Related Injuries and Illnesses page appears.
2. From the **Location** list, select a location. The establishment name, address, and industry fields are sourced from your company and subsidiary information, but you can edit these fields.
3. From the **Generate Report For** list, select the year to include in the report.
4. From the **Generate As** list, select the output format you want to generate: **PDF** or **XML Spreadsheet**.
5. In the **Annual Average Number of Employees** field, enter the annual average number of employees at your company. This number is for the calendar year you have selected, rounded to the nearest whole number. To calculate this value, add the total number of employees your establishment paid in all pay periods during the relevant year. This number includes full-time, part-time, temporary, seasonal, salaried and hourly. Then, divide that by the number of pay periods during that year. For more information about calculating this value, refer to your OSHA documentation.
6. In the **Annual Hours Worked by All Employees** field, enter the annual sum of hours worked by all employees at your company. This includes all full-time, part-time, temporary, seasonal salaried and hourly employees for the specified calendar year, rounded to the nearest whole number. For more information about calculating this value, refer to your OSHA documentation.
7. Click **Generate**.

# Affordable Care Act (ACA) Reporting

If you are an Applicable Large Employer (ALE) in the United States, you must comply with Affordable Care Act (ACA) reporting requirements. The ACA Reporting SuiteApp lets you set up and track the health coverage offered to full-time employees. Then, electronically file the required health care coverage forms (1094-C and 1095-C) to the Internal Revenue Service (IRS).

ACA reporting is required for ALEs, which are employers that have 50 or more full-time or full-time-equivalent employees. Employees are considered full-time if they work on average at least 30 hours per week, or 130 hours per month.

The SuiteApp lets you record and track employee health care information throughout the year as employees are hired, pass probation periods, and are offered coverage. At year end, you review and adjust the information as needed, before printing and distributing forms to employees and filing forms electronically with the IRS.

For more information about ACA reporting requirements, go to <https://www.irs.gov/instructions/i109495c>.

The 2021 version of the ACA SuiteApp introduces two additional offer of coverage plans: 1T and 1U. For more information, see [Assigning an ACA Offer of Coverage Plan to an Employee](#). For more information about coverage codes, visit <https://www.irs.gov/instructions/i109495c>.



**Important:** For the 2022 reporting year, the deadline for filing is January 26, 2023.

## ACA Reporting SuiteApp Features

The ACA Reporting SuiteApp enables you to do the following:

- View average hours of employment by employees for the specified measurement periods to assist in determining full-time equivalent status.
- Specify health coverage plans offered to groups of full-time employees at once, or to individuals as they become eligible.
- Review the information to be submitted to the IRS on the 1094-C and 1095-C forms. Use individual previews for each form, and a detailed report.
- Transmit the ACA information to process the electronic IRS filing, and print and distribute the forms to employees.

The following topics provide details about the ACA filing process:

- [Setting up the ACA Reporting SuiteApp](#)
- [ACA Pre-Filing](#)
- [ACA Filing](#)
- [Updating Employee Records for ACA](#)
- [Assigning an ACA Offer of Coverage Plan to an Employee](#)
- [Adding Covered Individuals to an Employee](#)
- [Adding Safe Harbor Codes to an Employee](#)
- [Excluding an Employee from ACA Reporting](#)
- [State-Specific ACA Reporting \(DC, NJ, CA, RI\)](#)

- Viewing ACA Filing History

## Setting up the ACA Reporting SuiteApp

This section includes the requirements and procedures for installing the ACA Reporting SuiteApp.

### Prerequisites for Installing the ACA Reporting SuiteApp



**Important:** To use the ACA Reporting SuiteApp, SuitePeople U.S. Payroll must be actively used during the filing year.

Before installing the ACA Reporting SuiteApp, the following features must be enabled:

- Payroll — Setup > Company > Setup Tasks > Enable Features > Employees
- Custom Records — Setup > Company > Setup Tasks > Enable Features > SuiteCloud
- Client SuiteScript — Setup > Company > Setup Tasks > Enable Features > SuiteCloud
- Server SuiteScript — Setup > Company > Setup Tasks > Enable Features > SuiteCloud

### Applicable Large Employer (ALE) Member Information

To use the ACA Reporting SuiteApp, you must enter the legal name as it should appear on tax forms. You must also enter an employer identification number (EIN) for at least one subsidiary. For more information, see the help topic [Creating Subsidiary Records](#). If you have employees that you are setting to part-time, those employees' subsidiaries should have at least one payroll earning item type. For more information, see the help topic [Creating Payroll Items](#).



**Note:** If you use NetSuite OneWorld and multiple subsidiaries have the same EIN, note the following. The subsidiaries have the same ALE record, and the employees for those subsidiaries are included in a single ACA file when filing. Any subsidiaries with different EINs have different ALE records and must file ACA information separately.

### Install the ACA Reporting SuiteApp

Only users with the Administrator role can install the ACA Reporting SuiteApp. This is a managed bundle and is automatically updated whenever there are updates.

After installation, the Affordable Care Act (ACA) subtab appears on the employee record and access to the ACA landing page is available. For more information, see [Updating Employee Records for ACA](#) and [View the ACA Landing Page](#).

The ACA Reporting SuiteApp can be disabled at any time. After it is disabled, billing stops and information for the current year is deleted. All filing data for prior years is retained for at least 7 years.

To install the ACA Reporting SuiteApp, go to Customization > SuiteBundler > Search & Install Bundles, and then click **Advanced**.

Use the following information to search for the SuiteApp:

- **Bundle Name** - Affordable Care Act (ACA) Reporting

- **Bundle ID** - 147355

For more information about installing SuiteApps, see the help topic [Installing a Bundle](#).

 **Note:** If the Install button is not available or if you cannot find this SuiteApp, this SuiteApp might not have been shared with your account. To get access to the SuiteApp, contact Customer Support.

## After the ACA Reporting SuiteApp Is Installed

Before you use the ACA Reporting SuiteApp, you must complete the following:

- Specify the day of the month to use for determining the monthly employee count that will appear on the 1094-C form. For more information, see [Setting Up Employer Information](#).
- Provide a default recipient for ACA-related email. For more information, see [Setting up a Default Recipient for ACA Notifications](#).
- Set up roles and permissions. For more information, see [Roles and Permissions](#).
- Ensure that each employee covered by ACA reporting requirements has a birth date defined on the Human Resources tab of their employee record. For more information, see [Entering Human Resources Information for an Employee](#).

## Roles and Permissions

Each role that requires access to the ACA Reporting SuiteApp must be specified on the ACA Grant Permissions page. To assign roles, go to Setup > Customization > ACA Grant Permission (Administrator).

Roles assigned to this permission can perform the following tasks:

- [Assigning an ACA Offer of Coverage Plan to an Employee](#)
- [Adding Covered Individuals to an Employee](#)
- [Adding Safe Harbor Codes to an Employee](#)
- [Excluding an Employee from ACA Reporting](#)
- [Identifying Part-Time Employees](#)
- [Creating an ACA Offer of Coverage Plan](#)
- [Assigning an ACA Offer of Coverage Plan to Multiple Employees](#)
- [Setting Up Employer Information](#)
- [ACA Filing](#)
- [Viewing ACA Filing History](#)

## Setting up a Default Recipient for ACA Notifications

You should set up a default recipient for ACA notifications. The default recipient receives an email message whenever changes applied to multiple employees for ACA reporting purposes have completed. This includes when an ACA offer of coverage plan has been assigned to multiple employees, and when multiple employees have been identified as part-time.

### To set up a default recipient for ACA notifications:

1. Go to Setup > Company > Preferences > General Preferences (Administrator).
2. Click the **Custom Preferences** subtab.
3. From the **Email Notification Recipient** list, select the default recipient. The recipient must be an employee.
4. Click **Save**.

## View the ACA Landing Page

To access the ACA landing page, go to Transactions > Employees > Affordable Care Act (Administrator). You can also go to Payroll and HR > Payroll > Affordable Care Act (Payroll Manager). Here you will find the steps you need to complete for pre-filing and filing.

 **Note:** If the ACA SuiteApp was recently updated, an error message may appear. The message indicates that the ACA landing page is not available due to a data migration failure. In this case, you cannot use the ACA SuiteApp. Please contact support.

For more information, see the following help topics:

- [ACA Pre-Filing](#)
- [ACA Filing](#)

## ACA Pre-Filing

Before filing, there are a number of pre-filing tasks to perform. Pre-filing involves identifying part-time employees, setting up and assigning an offer of coverage to employees, and entering employer ACA information. The information entered during pre-filing is used to file the 1094-C and 1095-C forms that are required for ACA reporting at year-end.

The ACA landing page guides you through each of the required pre-filing steps. To make filing at year-end manageable, this information can be easily tracked and updated on a monthly basis.

For information about the 1094-C and 1095-C forms, go to <https://www.irs.gov/instructions/i109495c>. For information on filing, see [ACA Filing](#).

ACA pre-filing includes:

- [Identifying Part-Time Employees](#)
- [Creating an ACA Offer of Coverage Plan](#)
- [Assigning an ACA Offer of Coverage Plan to Multiple Employees](#)
- [Setting Up Employer Information](#)

## Identifying Part-Time Employees

The first step for ACA pre-filing is identifying part-time employees. These are employees that do not meet the minimum number of hours to be considered full-time for a specified period.

### To identify part-time employees:

1. Go to Payroll and HR > Payroll > Affordable Care Act (Payroll Manager).

2. If applicable, select the specific subsidiary from the **View** list.
3. Select the payroll items that are considered eligible hours of service. These are used for determining an employee's full-time status, as defined under Section 4980H. ACA-eligible payroll items include:
  - Earning: Wage
  - Earning: Salary
  - Earning: Vacation
  - Earning: Sick

The payroll items are automatically selected, but the list can be modified, if necessary.



**Note:** If the ALE member has multiple subsidiaries, at least one subsidiary must have payroll items set up. If a subsidiary does not have payroll items defined, a warning message appears showing which subsidiaries do not have payroll items defined. If there are multiple subsidiaries, you can choose payroll items for subsidiaries that do have them defined.

For more information about payroll items, see the help topic [Payroll Items Setup](#). For more information about eligible hours of service, go to <https://www.irs.gov/instructions/i10949c>.

4. Click **Done** to save the changes and return to the ACA landing page.
5. To identify employees that do not meet the minimum number of hours to be considered full-time, click **Set Part-Time**.
6. To filter the list of employees, specify a **Start Date** and **End Date** for the employees' paychecks. These two dates must be at least three months apart.
7. By default, the **Show Employees Who Worked Less Than 130 hours per month** and **30 hours per week** boxes are checked. To show employees who fall outside of these parameters, clear the boxes.
8. By default, the **Show inactive and terminated employees in the current filing year** box is not checked. To show these employees, check this box.
9. Select one or more employees, and click **Set to Part-Time**.
10. Specify the date range during which the employee will be considered part-time.

For example, an employee had an average of less than 30 hours per week, from January 1 to December 31, 2021. This employee may be set to part-time from January 1 to December 31, 2022 for the purposes of ACA. For more information, see <https://www.irs.gov/instructions/i10949c>.

11. Click **OK**.
12. Verify that the date range that the specified employees will be set to part-time status is correct in the 2020 Part Time Status column.
13. Click **OK**.

The contact set up as the default recipient for ACA notifications receives an email message after the changes have been applied. For more information, see [Setting up a Default Recipient for ACA Notifications](#).

To make changes, click **Edit Hours** from the ACA landing page.

## Creating an ACA Offer of Coverage Plan

An offer of coverage plan contains information about the health coverage for employees. Assign them to employees from the employee record, or to multiple employees from the pre-filing section of the ACA

landing page. For more information, see [Assigning an ACA Offer of Coverage Plan to an Employee](#) and [Assigning an ACA Offer of Coverage Plan to Multiple Employees](#).

### To create an ACA offer of coverage plan:

1. Go to Payroll and HR > Payroll > Affordable Care Act (Payroll Manager).
2. If you have a NetSuite OneWorld account, select the subsidiary from the **View** list.
3. Click **Add Coverage**.
4. In the **Name** field, enter the name of the plan.
5. If a carrier provides coverage, enter the name in the **Carrier** field.
6. If the plan is self-insured, check the **Self Insured** box. If you check this box, then make sure to enter the covered individuals for a self-insured plan. For instructions, see [Adding Covered Individuals to an Employee](#).



**Note:** If this offer of coverage plan is assigned to an employee, then you cannot change the self-insured status of the plan.

7. Select the offer of coverage code from the **Code** list. Codes specify the type of coverage available to the employee, their spouse, and dependents. For more information about coverage codes, visit <https://www.irs.gov/instructions/i109495c>.

The list of coverage codes includes:

- 1A - Qualifying Offer: Minimum essential coverage providing minimum value. It is offered to full-time employee with employee contribution for self-only coverage equal to or less than 9.5% mainland single federal poverty line. It is at least minimum essential coverage offered to spouse and dependent(s).
- 1B - Minimum essential coverage providing minimum value offered to employee only.
- 1C - Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to dependent(s) (not spouse).
- 1D - Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to spouse [not dependent(s)].
- 1E - Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to dependent(s) and spouse.
- 1F - Minimum essential coverage **not** providing minimum value. It is offered to the employee, employee and spouse or dependents, or employee, spouse and dependents.
- 1G - Offer of coverage to employee who was not a full-time employee for any month of the calendar year. This may include one or more months in which the individual was not an employee. It may also include an employee who enrolled in self-insured coverage for one or more months of the calendar year.
- 1H - No offer of coverage. The employee was not offered any health coverage, or the employee was offered coverage that is not minimum essential coverage. This may include one or more months in which the individual was not an employee.
- 1J - Minimum essential coverage providing minimum value offered to the employee. It provides at least minimum essential coverage conditionally offered to spouse. It does not provide minimum essential coverage to dependents.
- 1K - Minimum essential coverage providing minimum value offered to the employee. It provides at least minimum essential coverage offered to dependents, and at least minimum essential coverage conditionally offered to the spouse.
- 1L - Individual coverage health reimbursement arrangement (HRA) offered to you only with affordability determined by using employee's primary residence location ZIP code.

- 1M - Individual coverage HRA offered to you and dependents (not spouse) with affordability determined by using employee's primary residence location ZIP code.
  - 1N - Individual coverage HRA offered to you, spouse and dependents with affordability determined by using employee's primary residence location ZIP code.
  - 1O - Individual coverage HRA offered to you only using the employee's primary employment site ZIP code affordability safe harbor.
  - 1P - Individual coverage HRA offered to you and dependents (not spouse) using the employee's primary employment site ZIP code affordability safe harbor.
  - 1Q - Individual coverage HRA offered to you, spouse and dependents using the employee's primary employment site ZIP code affordability safe harbor.
  - 1R - Individual coverage HRA that is NOT affordable offered to you, employee and spouse or dependents, or employee, spouse, and dependents.
  - 1S - Individual coverage HRA offered to an individual who was not a full-time employee.
  - 1T - Individual coverage HRA offered to an employee and spouse (no dependents) with affordability determined using the employee's primary residence ZIP code.
  - 1U - Individual coverage HRA offered to an employee and spouse (no dependents) using employee's primary employment site ZIP code affordability safe harbor.
8. If you select any coverage code in the 1B–1U range, note the following. Enter the employee's lowest monthly premium for self-only minimum essential coverage in the **Lowest Cost of Employee Coverage** field. Enter a **Start Month** and a **Start Year**.
  9. If you select coverage codes 10, 1P, 1Q, or 1U, you can enter a **Default ZIP Code** for the employee's primary employment site.
  10. Click **Add**.
  11. If the premium changed throughout the reporting year, add additional lines. Dates cannot overlap.
  12. Click **Save**.

## Making an ACA Offer of Coverage Plan Inactive

Make plans inactive to prevent them from appearing in lists. A plan is still assigned to an employee when it is inactive.

### To make an ACA offer of coverage inactive:

1. Go to Payroll and HR > Payroll > Affordable Care Act (Payroll Manager).
2. Click the **Coverages** link beside **Set Up & Assign Coverage**.
3. Click **Edit** next to the plan to deactivate.
4. Check the **Offer of Coverage Inactive** box.
5. Click **Save**.

## Deleting an ACA Offer of Coverage Plan

Delete a plan when it is unassigned and not needed.

### To delete an ACA offer of coverage plan:

1. Go to Payroll and HR > Payroll > Affordable Care Act (Payroll Manager).
2. Click the **Coverages** link beside **Set Up & Assign Coverage**.

3. Click **Edit** next to the plan to delete.
4. Select **Delete** from the **Actions** menu.
5. Click **OK**.

## Assigning an ACA Offer of Coverage Plan to Multiple Employees

After an offer of coverage plan has been set up, it can be assigned to a group of employees from the ACA landing page. The information entered here is used to generate the 1095-C forms to be filed for each employee. For more information, go to <https://www.irs.gov/instructions/109495c>.

### To assign an ACA offer of coverage plan to multiple employees:

1. Go to Payroll and HR > Payroll > Affordable Care Act (Payroll Manager).
2. If you have a NetSuite OneWorld account, select the specific subsidiary from the **View** list.
3. Click **Assign Coverage**.
4. By default, employees who were not full-time or not employed for the entire reporting year are excluded. Also by default, employees who were inactive and terminated in the current filing year are excluded. You can use the filters to control which employees are shown in the list.
5. By default, the **Show inactive and terminated employees in the current filing year** box is not checked. To show these employees, check this box.
6. From the list, select the employees to assign this coverage to.
7. Click **Assign Coverage**.
8. Select the offer of coverage plan, from the **Plan** list.
9. Enter a start date when the coverage plan is offered to the selected employees.
10. To record that coverage was offered after the employee's limited non-assessment period, check the **Override start date with employees eligibility date** box. This is implemented only when the eligibility date is later than the specified start date.
11. Check the **Auto-assign Safe Harbor Code 2C** box if each employee that was offered health coverage was enrolled in the coverage offered.
12. Click **Assign**.
13. Make sure the information displayed in the Plan column, and the Coverage column are correct.
14. If you have multiple plans that are assigned to different groups of employees, repeat the above steps.
15. Click **Save**.

The contact set up as the default recipient for ACA notifications receives an email message after the changes have been applied. For more information, see [Setting up a Default Recipient for ACA Notifications](#).

## Setting Up Employer Information

You use the Employer Information page to enter information about the ALE member, which is used to file the 1094-C form at year end. ACA employer setup includes entering information for all ALE members of an aggregated group.

For example, company A is the parent of company B and company C. Combined, these companies have 100 full-time employees. Each separate employer in an ALE aggregated group is subject to the

employer shared responsibility provisions. In addition, each is subject to the associated information reporting requirements. Each separate employer must file its own 1094-C form, using its own Employer Identification Number (EIN).

### To set up employer information:

1. Go to Payroll and HR > Payroll > Affordable Care Act (Payroll Manager).
2. If you have a NetSuite OneWorld account, select the specific subsidiary from the **View** list.
3. Click **Set Up Employer**.
4. NetSuite automatically inserts information from the company or subsidiary record. To make changes, you can edit the information here.
5. Enter the name and contact number of the person who is responsible for answering questions from the IRS regarding the filing.
6. If there is a parent company, each separate employer is subject to the employer shared responsibility provisions. Click the **Other ALE Members** subtab. Select the months that the company was a member of the same ALE group. Enter the company names, and unique EIN numbers of each affiliated ALE member.
7. Click **Add**.
8. If your employer is eligible for transition relief, select the certifications that apply from the **Certifications of Eligibility** subtab:
  - **Qualifying Offer Method** - A qualifying offer was offered to full-time employees for every month during the year that the employees were considered full-time.
  - **98% Offer Method** - Offer of affordable health coverage. It provides minimum value to at least 98% of your employees, and minimum essential coverage to those employees' dependents.
9. Click the **Preferences** subtab. From the **Employee Count Based On** list, select the day of the month for determining the monthly employee count on the 1094-C form.  
For example, you select **First Day of Each Month**. An employee leaves the company in the middle of the month. They are still included in the monthly count.
10. In the **Plan Start Month** list, select the month during which the health plan offering coverage begins. This Plan Start Month is reflected for the affected employees.
11. In the **Limited Non-Assessment Period Override** field, enter the number of days (0-90) for which the Limited Non-Assessment Period can be overridden. This number is added to the employee's hire date or date of exclusion from ACA to determine the Limited Non-Assessment Period End Date. This is true unless you have chosen to set this date manually.  
If you want to apply this new override value to all existing employees, then click **OK** in the confirmation popup that appears. To only apply this change to future employees, click **Cancel**.
12. Click **Save**.

## ACA Filing

When the reporting year is complete, the required health coverage forms (1094-C and 1095-C) can be electronically filed to the IRS. When you file your company's ACA files, the data is examined by Ceridian, your payroll partner. If it passes validation, Ceridian forwards your files to the IRS.

### To file for ACA:

1. Go to Payroll and HR > Payroll > Affordable Care Act (Payroll Manager).
2. Click **Generate** from the Ready to File section of the ACA landing page.

3. To preview the 1094-C and 1095-C forms, click **Preview**. Alternatively, click the **View Audit Log** link to open a file that can be viewed in Microsoft Excel.
4. Review the details and included employees in the preview or the audit log. You can view error details in the audit log. Any errors must be corrected before you can transmit your ACA file.



**Note:** Employees who are both inactive and terminated, with termination dates in this filing year and with reportable coverages assigned, will be included for reporting.

5. When you are ready to transmit, click **File**. The File section shows the filings you have sent, with a filing number and date and time.

### To check for ACA filing errors and refile:

1. Go to Payroll and HR > Payroll > Affordable Care Act (Payroll Manager).
2. On the ACA landing page, the Ready to File section shows the status of your filings. It also shows with the filing number and date and time of your transmission. If your filing did not pass the Ceridian validation, an **Errors** button appears beside the filing. Click **Errors** to view the errors returned by Ceridian. A popup window appears showing the errors that occurred.
3. Correct the errors as indicated in the popup window. For assistance resolving these errors, contact NetSuite Customer Support.
4. For any employees who had errors in the filing, edit the employee record and clear the errors.
5. When you have corrected the errors, return to the ACA landing page and click **Re-Generate**.
6. Click **Preview** and **View Audit Log** to confirm that your data is ready to be sent.
7. Click **Refile**.

## Removing Ineligible Employees from ACA Reporting

After you have already transmitted your ACA filing to the IRS, you can remove employees from ACA reporting. For example, you would remove an employee from reporting if they become ineligible or if you added them in error. To do this, you void their 1095-C form on their employee record and then refile. If you have not filed your ACA information with the IRS and you must remove an employee from reporting before filing, you can exclude them. For more information, see [Excluding an Employee from ACA Reporting](#).

### To remove ineligible employees from ACA reporting:

1. Go to Payroll and HR > Lists > Employees (Payroll Manager).
2. On the Employees list, click **Edit** next to the employee you want to remove from reporting.
3. Click the **Affordable Care Act (ACA)** subtab.
4. Check the **Void 1095-C Form** box.
5. Click **Save**.
6. Rerefile your ACA data using the preceding **To check for ACA filing errors and refile** procedure.

## Tracking Minimum Essential Coverage

Before making your ACA filing, you can see whether or not you are complying with ACA rules regarding minimum essential coverage. If you are not compliant, you may be subject to an employer shared responsibility payment. You can view the Minimum Essential Coverage Offer Indicator in two ways:

- From the ACA landing page, click Preview. The Preview 1094C page appears, showing the Minimum Essential Coverage Offer Indicator for the whole filing year and for each month. If you are compliant for a given period, then Yes is checked for that period.
- From the ACA landing page, click View Audit Log. Open the XML file that is downloaded in Microsoft Excel. Click the 1095-C Part III tab. Under Part III: ALE Member Information — Monthly. A Minimum Essential Coverage Indicator row appears for the entire year and for each month with a Yes or No in the Data column.

The ACA SuiteApp determines the minimum essential coverage offer indicator value in the following way:

- The value is Yes (you are compliant) if you have not offered coverage to five of your employees. Five employees is greater than five percent of your total full-time employees. For example, you have 120 employees and 115 have offers. You are compliant because 95 percent of your employees have coverage and five employees is less than 5 percent of your employees.
- The value is No (you are not compliant) when the number of employees offered coverage is not equal to five. Five employees is greater than five percent of your total employees. For example, you have 50 employees and 48 have an offer of coverage. You are not compliant because you have fewer than five employee not covered, and five employees is 10 percent of your employees.



**Note:** If an employee has a coverage code of 1H and a safe harbor code of 2E, they are considered covered regardless of the calculation.

For more information, go to <https://www.irs.gov/affordable-care-act/employers/types-of-employer-payments-and-how-they-are-calculated>.

## Updating Employee Records for ACA

The ACA Reporting SuiteApp displays the Affordable Care Act (ACA) subtab on the employee record. You can assign an offer of coverage plan, add any covered individuals who are included in the plan, and apply a safe harbor code.

The following topics detail the ACA setup tasks you can complete on the employee record:

- [Assigning an ACA Offer of Coverage Plan to an Employee](#)
- [Adding Covered Individuals to an Employee](#)
- [Adding Safe Harbor Codes to an Employee](#)
- [Excluding an Employee from ACA Reporting](#)

## Assigning an ACA Offer of Coverage Plan to an Employee

Before an ACA offer of coverage plan can be assigned, one must be created first.

To assign a plan to multiple employees at one time, go to the ACA landing page. For more information, see [Assigning an ACA Offer of Coverage Plan to Multiple Employees](#).

The **Limited Non-Assessment Period End Date** is calculated as the end of the employee's third full calendar month of full-time employment. This date is based on the employee's hire date, or the end of their exclusion from ACA. It is used to report when the employee is considered full-time for the purpose of ACA reporting. You should use the calculated end date, but you can override it. For example, your employees are eligible for benefits after 30 days of employment. You could choose to set this date manually to 30 days after the hire date for each employee.

## To assign an ACA Offer of Coverage Plan to an employee:

1. Go to Payroll and HR > Lists > Employees (Payroll Manager).
2. On the Employees list, click **Edit** next to the employee who was offered coverage.
3. Click the **Affordable Care Act (ACA)** subtab.
4. Click the **Offer of Coverage** subtab.
5. From the **Plan** list, select the offer of coverage plan. If there is no offer of coverage plan shown, ensure one was created. For more information, see [Creating an ACA Offer of Coverage Plan](#).
6. Enter the **Start Month** and **Start Year** for this offer of coverage plan. Only enter an **End Month** and **End Year** when the employee has left the company, or if they changed to another offer of coverage plan.
7. If you have selected coverage codes 1L, 1M, 1N, or 1T, enter the employee's residential ZIP code in the **ZIP Code** field. Enter the **Employee Required Contribution**.
8. If you have selected coverage codes 10, 1P, 1Q, or 1U, enter the employee's employment ZIP code in the **ZIP Code** field. Enter the **Employee Required Contribution**.
9. Click **Add**.
10. Add additional lines if the employee was offered more than one coverage plan during the reporting year.
11. To set a different Limited Non-Assessment Period End Date, check the **Override Limited Non-Assessment Date** box and enter a different date.
12. Click **Save**.

## Adding Covered Individuals to an Employee

On the Covered Individuals subtab, you add the employee after you have assigned an offer of coverage plan to the employee. The employee's name and date of birth (if included on the employee record) are sourced from the employee record automatically. You also add the employee's spouse, dependents, or both, who are covered under the offer of coverage plan. Covered individuals are only required when the offer of coverage plan is self-insured. When a coverage plan is self-insured, it indicates that the employer assumes the financial risk of providing health care benefits to its employees. The individuals entered on the Covered Individuals subtab should meet the criteria of the coverage that is set up on the plan.

For example, the coverage plan code is 1C. Only add dependents to the list, not the employee's spouse. For more information on the types of coverage, see [Creating an ACA Offer of Coverage Plan](#).

## To add covered individuals to an employee:

1. Go to Payroll and HR > Lists > Employees (Payroll Manager).
  2. On the Employees list, click **Edit** next to the employee to add covered individuals to.
  3. Click the **Affordable Care Act (ACA)** subtab.
  4. Click the **Covered Individuals** subtab.
- Note:** You must list the employee first and then list the spouse, dependents, or both, as applicable.
5. If you have not added the employee to the covered individuals list, then click **Add Employee**. The employee's name and date of birth (if included on the employee record) are populated. Confirm or enter the employee's **Date of Birth** and the **Start Month** and **Start Year** for the coverage. Optionally, enter the **End Month** and **End Year**. Click **Add**.

6. For each of the employee's spouse, dependents, or both, complete the following fields:

- **First Name**
- **Last Name**
- **Date of Birth**
- **Start Month**
- **Start Year**

Optionally, enter the **End Month** and **End Year**. Click **Add**.

7. Add additional lines for each individual that is covered under the plan.
8. Click **Save**.

## Adding Safe Harbor Codes to an Employee

Safe harbor codes apply when an employee qualifies for an exemption from the assessable payment. Manual entry is not required for employees that were not full-time, terminated, excluded from ACA, or in a limited non-assessment period. Instead, the applicable safe harbor code is automatically added when generating the ACA filing. Manual entry is required when safe harbor codes 2E, 2F, 2G, or 2H are applicable or if an existing code must be overridden.

For more information about safe harbor codes, see <https://www.irs.gov/instructions/i109495c> and [Automatically Applied Safe Harbor Codes](#).

## Automatically Applied Safe Harbor Codes

The following are automatically applied safe harbor codes:

- 2A - Automatically added for any months that an employee was not employed on any day of the calendar month. This includes employees who were not yet hired, excluded from ACA, or terminated before the first day of the reporting month.
- 2B - Automatically added for any months that an employee was not considered full-time. This includes employees who were excluded from ACA or terminated during the reporting month.
- 2C - Can be applied automatically when assigning an ACA offer of coverage plan to multiple employees. For more information, see [Assigning an ACA Offer of Coverage Plan to Multiple Employees](#).
- 2D - Automatically added for any months that an employee was in a limited non-assessment period.

### To add safe harbor codes to an employee:

1. Go to Payroll and HR > Lists > Employees (Payroll Manager).
2. On the Employees list, click **Edit** next to the employee you want to add a safe harbor code to.
3. Click the **Affordable Care Act (ACA)** subtab.
4. Click the **Safe Harbor Codes** subtab.
5. From the **Code** list, select the safe harbor code.

The safe harbor codes include:

- 2A. Employee not employed during the month. This safe harbor code is automatically applied during filing.
- 2B. Employee not full-time. This safe harbor code is automatically applied during filing.

- 2C. Employee enrolled in coverage offered. Use this code for any month the employee enrolled for each day of the month in health coverage offered by the ALE member. This is true regardless of whether any other code in Code Series 2 might also apply.  
Do not use this code:
    - For any month in which the multi-employer interim rule relief applies. Instead, enter code 2E.
    - If code 1G is entered in the **Code** list on the ACA offer of coverage plan. For more information, see [Creating an ACA Offer of Coverage Plan](#).
    - For any month that an employee is enrolled in COBRA continuation coverage or other post-employment coverage. Instead, enter code 2A.
    - For any month that the employee enrolled in coverage that was not minimum essential coverage.
  - 2D. Employee in a Section 4980H (b) limited non-assessment period. This safe harbor code is automatically applied during filing.
  - 2E. Multi-employer interim rule relief. Use this code for any month for which the multi-employer arrangement interim guidance applies for that employee. This is true regardless of whether any other code in Code Series 2 (including code 2C) might also apply.
  - 2F. Section 4980H affordability from W-2 safe harbor. Use this code if the ALE member used Section 4980H Form W-2 safe harbor to determine affordability. This is for purposes of Section 4980H(b) for this employee for the year. If the member uses this safe harbor, it must be used for each month of the calendar year the employee is offered health coverage.
  - 2G. Section 4980H affordability federal poverty line safe harbor. Use this code if the ALE member used Section 4980H federal poverty line safe harbor to determine affordability. This is for purposes of section 4980H(b) for this employee for any months.
  - 2H. Section 4980H affordability rate of pay safe harbor. Use this code if the ALE member used Section 4980H rate of pay safe harbor to determine affordability. This is for purposes of Section 4980H(b) for this employee for any months.
6. Enter the **Start Month** and **Start Year** of the period when the exemption applied for the employee. Enter the **End Month** and **End Year** if this code applied for a short period of time. Note that this date cannot be before the employee's hire date.
  7. Click **Add**.
  8. Click **Save**.

## Excluding an Employee from ACA Reporting

Unless otherwise specified, all employees are included in ACA reporting. They can be excluded for all or part of the reporting year, if they were not considered full-time, as defined under Section 4980H. Alternatively, they are not considered an employee for the purpose of ACA reporting. For example, a contractor, a sole proprietor, or a partner may not be an employee for the purposes of ACA reporting.

### To exclude an employee from ACA reporting:

1. Go to Payroll and HR > Lists > Employees (Payroll Manager).
2. On the Employees list, click **Edit** next to the employee to exclude from ACA reporting.
3. Click the **Affordable Care Act (ACA)** subtab.
4. Click the **Exclude from ACA** subtab.
5. From the **Reason** list, select why the employee is excluded from ACA reporting.
6. Enter the **Start Month** and **Start Year** for the exclusion.

7. Optionally, enter the **End Month** and **End Year** for the exclusion.
8. Click **Add**.
9. Click **Save**.

## State-Specific ACA Reporting (DC, NJ, CA, RI)

For employees who reside in the District of Columbia (DC), or New Jersey (NJ), California (CA), or Rhode Island (RI), note the following. You have additional state-specific reporting requirements under the Affordable Care Act. You must report any employees who resided in any of these four jurisdictions during a particular reporting year. You must also report the specific months when those employees resided in any of those jurisdictions.

Before filing your ACA reporting with state-specific information, ensure that you have done the following:

- Define your workplaces for all jurisdictions where you have a tax ID and maintain paid employees. For more information, see the help topic [Entering Workplace Records for Payroll](#).
- Confirm your tax information for each jurisdiction, specifically the State ID for each of the four mandated states. For more information, see the help topic [Setting Preferences for Jurisdictions](#).
- Confirm your state IDs. If you attempt to generate the ACA file without valid state IDs, a warning message appears. To avoid this message, follow the procedure in [Confirming Your State IDs](#).

## Confirming Your State IDs

When filing state-specific reporting, the relevant state IDs are required. By default, the state IDs reported are defined in the jurisdiction settings.

### To confirm your State IDs:

1. Go to Setup > Payroll > Setup Tasks > Set Up Payroll.
2. If you have a NetSuite OneWorld account, select the subsidiary from the **Subsidiary** list.
3. Click the **Jurisdictions** subtab.
4. Click the subtab for the four mandated states:
  - a. For the District of Columbia, the State ID is sourced from the OTR Account Number.
  - b. For New Jersey, the State ID is sourced from the Taxpayer Identification Number.
  - c. For California, the State ID is sourced from the ALE Member's FEIN.
  - d. For Rhode Island, the State ID is sourced from the ALE Member's FEIN.



**Note:** If an employee earned income in DC in any month, they are considered a resident of DC for that month for ACA reporting purposes. This is true even if they resided in another state.

If you do not configure the states in the jurisdiction settings, NetSuite uses the Employer Identification Number (EIN) in the Company and Subsidiary settings.

## Viewing and Editing an Employee's State History

The state history records an employee's residence in the four mandated states (DC, NJ, CA, and RI). If an employee moved into or out of a mandated state during a month, they are considered as residents of that state during that month.

When you install or update the ACA SuiteApp, the employees' state histories are generated from the system notes on the employee record. Subsequently, when you edit an employee's address on the employee record, their state history is updated.

### To view or edit an employee's state history:

1. Go to Payroll and HR > Lists > Employees (Payroll Manager).
2. On the Employees list, click **Edit** next to the employee whose state history you want to view.
3. Click the **Affordable Care Act (ACA)** subtab.
4. Click the **State History** subtab.
5. If you need to correct information in the state history, click the row of the field you want to edit.
6. For each time period when the employee resided in a mandated state, enter the **State, Start Month, Start Year, End Month, and End Year**. To indicate that you manually edited the state history, check the **Is Manually Added** box.
7. Click **Save**.

## Verifying Employee State History Information

When you are ready to file your ACA compliance, you can view the state history information in the audit log to confirm accuracy.

### To verify employee state history:

1. Go to Payroll and HR > Payroll > Affordable Care Act (Payroll Manager).
2. Click **Generate** in the Ready to File section of the ACA landing page.
3. Click the **View Audit Log** link to open a file that can be viewed in Microsoft Excel.
4. Click the state-specific tabs to view the months of the year, the full-time employee count, and overall employee count for employees residing in those states. Each tab also shows the appropriate State ID.

## Viewing ACA Filing History

If you used the ACA Reporting SuiteApp to report compliance for the previous year, you can view your filing history on the ACA landing page.

### To view ACA filing history:

1. Go to Payroll and HR > Payroll > Affordable Care Act (Payroll Manager).
2. On the ACA landing page, in the Filing History section, click **View** to view the previous year's filing.

# Government-Issued ID Tracking

The Government-Issued ID Tracking feature lets you track a variety of government-issued identification information about your employees. Tracking this information ensures that you have accurate documentation for your employees' travel, driving qualifications, and tax compliance.

For more information about this feature, see the following help topics:

- [Government-Issued ID Tracking Overview](#)
- [Managing Government-Issued ID Types](#)
- [Managing Basic Government-Issued ID for Employees](#)
- [Managing Advanced Government-Issued ID for Employees](#)

## Government-Issued ID Tracking Overview

The Government-Issued ID Tracking feature lets you track a variety of government-issued identification information about your employees. Tracking this information ensures that you have accurate documentation for your employees' travel, driving qualifications, and tax compliance.

For each employee, you can enter information about their passport(s), driver's license(s), and several other government-issued IDs, such as tax identification numbers.

Many other government-issued IDs are relevant only in particular jurisdictions. You can make some ID types inactive if you are not going to use them. When you make them inactive, they do not appear in the list of available types when you are adding IDs to an employee's record.

Before using Government-Issued ID Tracking, enable one of the two features: Basic or Advanced.



**Note:** If you enable one of these features and then try to enable the other one, NetSuite displays a warning. Any custom scripting you have created will no longer function and must be changed.

## Basic Government-Issued ID Tracking

The Basic Government-Issued ID Tracking feature enables you to track:

- Passport Number
- Driver's License Number

## Advanced Government-Issued ID Tracking

The Advanced Government-Issued ID feature provides several ID types by default. It also allows you to create, edit, and delete your own custom types of ID to match your company's employee identification policies. By default, the feature includes:

- Passport Number
- Driver's License Number
- Individual Taxpayer Identification Number (ITIN)
- Inland Revenue Department Number (IRD)
- National Insurance Number (NINO)

- Social Insurance Number (SIN)
- Social Security Number (SSN)
- Tax File Number (TFN)

You cannot delete the standard government-issued ID types that are included in NetSuite by default. However, you can make them inactive (except for passport and driver's license). Inactive ID types do not appear in the list of available types when you are add IDs to an employee's record.

## Roles and Permissions

For details about the permission requirements for Government-Issued ID Tracking, see [Advanced and Basic Government-Issued ID Tracking Permission Requirements](#).

## Managing Government-Issued ID Types

If you use the Advanced Government-Issued ID Tracking feature, NetSuite has several ID types included by default. For example, driver's license, passport, and tax identification numbers. If you need additional government-issued ID types, you can create custom ones to match your company's employee identification policies.

You cannot delete the standard government-issued ID types that are included in NetSuite by default. However, you can make them inactive (except for passport and driver's license). Inactive ID types do not appear in the list of available types when you are add IDs to an employee's record.



**Note:** This is available only if you use Advanced Government-Issued ID Tracking.

## Adding a Custom ID Type

Use the following procedure to add a custom ID type.

### To add a custom ID type:

1. Go to Setup > HR Information System > Government-Issued ID Types > New or click **New Government-Issued ID Type** on the Government-Issued ID Types page.  
To modify an existing custom type, go to Setup > HR Information System > Government-Issued ID Types. Then, click **Edit** next to the name of the type.
2. In the **Name** field, enter a name for the type.
3. In the **Description** field, enter a short unique description for the type.
4. If you want to be able to record more than one instance of this type for a particular employee, check the **Multiple Instances Allowed** box.
5. If you want this type to be inactive, check the **Inactive** box. This affects how the type appears on the Government-Issued ID Types list.
6. Click **Save**.

## Viewing the List of Government-Issued ID Types

Use the following procedure to view the list of government-issued ID types.

### To view the list of government-issued ID types:

1. Go to Setup > HR Information System > Government-Issued ID Types.
2. To see all inactive types, check the **Show Inactives** box.
3. To view an individual type, click **View** next to the name of the type.

## Deleting a Custom ID Type

Use the following procedure to delete a custom ID type.

### To delete a custom ID type:

1. Go to Setup > HR Information System > Government-Issued ID Types.
2. Click **Edit** beside the custom type you want to delete.
3. On the **Actions** menu, select **Delete**. You cannot delete any standard ID types included by default.
4. When prompted to confirm the deletion, click **OK**.

## Managing Basic Government-Issued ID for Employees

If you use the Basic Government-Issued ID Tracking feature, you can enter information for employees about these types of ID:

- Passport Number
- Driver's License Number

You enter only the numbers for these two types of ID. To enter more detailed information, you must enable the Advanced Government-Issued ID Tracking feature. You enter this information in two ways: from the employee record, or from list page for the type of ID you are entering.

Ensure that you enter information exactly as it appears on the original documents.

## Adding or Editing Passport Information

Use the following procedure to add or edit passport information.

### To add or edit passport information:

1. Go to Lists > Employees > Employees and then click **Edit** beside the employee whose information you want to add or edit.
2. On the **Human Resources** subtab, enter the employee's passport number in the **Passport Number** field.
3. Click **Save**.

## Adding or Editing Driver's License Information

Use the following procedure to add or edit driver's license information.

### To add or edit driver's license information:

1. Go to Lists > Employees > Employees and then click **Edit** beside the employee whose information you want to add or edit.
2. On the **Government-Issued ID** subtab, enter the employee's driver's license number in the **Driver's License Number** field.
3. Click **Save**.

## Managing Advanced Government-Issued ID for Employees

If you use the Advanced Government-Issued ID Tracking feature, you can enter information for employees about these types of ID:

- Passport Number
- Driver's License Number
- Individual Taxpayer Identification Number (ITIN)
- Inland Revenue Department Number (IRD)
- National Insurance Number (NINO)
- Social Insurance Number (SIN)
- Social Security Number (SSN)
- Tax File Number (TFN)

With the Advanced feature, you can also add information for custom types that you have created. Ensure that you enter information exactly as it appears on the original documents.

You enter this information in two ways: from the employee record, or from list page for the type of ID you are entering.

### Adding or Editing Passport Information

Use the following procedure to add or edit passport information.

### To add or edit passport information:

1. Go to Lists > Employees > Employees and then click **Edit** beside the employee whose information you want to add or edit.
2. On the **Government-Issued ID** subtab, under Passport, click **New Passport**.
3. In the Passport window, enter the **Nationality**.
4. Enter the **Date of Issue**.
5. Optionally, enter a **Description**, especially if you are entering more than one passport for this employee.
6. Enter the employee's **Name As It Appears On Document**.
7. Enter the **Date of Expiration**.
8. Enter the **Issuing Authority/Region**.
9. Enter the **Passport Number**.

10. Click **Save**.

## Adding or Editing Driver's License Information

Use the following procedure to add or edit driver's license information.

### To add or edit driver's license information:

1. Go to Lists > Employees > Employees and then click **Edit** beside the employee whose information you want to add or edit.
2. On the **Government-Issued ID** subtab, under Driver's License, click **New Driver's License**.
3. In the Driver's License window, enter the **Date of Issue**.
4. Optionally, enter a **Description**, especially if you are entering more than one driver's license for this employee.
5. Enter the employee's **Name As It Appears On Document**.
6. Enter the **Date of Expiration**.
7. Enter the **Class/Level** of the license.
8. Enter the **Issuing Authority/Region**.
9. Enter the **Driver's License Number**.
10. Click **Save**.

## Adding or Editing Other ID Information

Use the following procedure to add or edit other ID information.

### To add or edit other ID information:

1. Go to Lists > Employees > Employees and then click **Edit** beside the employee whose information you want to add or edit.
2. On the **Government-Issued ID** subtab, under Other Government-Issued IDs, click **New Government-Issued ID**.
3. In the Other Government-Issued ID window, select an ID type from the **Government-Issued ID Type** list. If the ID type you want to add does not appear in the list, you can add custom ID types. For more information, see [Managing Government-Issued ID Types](#).
4. Click the **Number** field and then enter the ID number.
5. Click the **Name As It Appears On Document** field and then enter the employee's name. Ensure that you enter the name exactly as it appears on the document.
6. Optionally, click the **Description** field and then enter a description for this ID.
7. Optionally, enter the **Date of Expiration**.
8. Add any more IDs for this employee.
9. Click **Save**.

# Benefits Tracking

The Benefits Tracking SuiteApp enables you to track your company's benefits plans so that both Human Resources and employees can access the details of plans within NetSuite instead of using the benefits carriers' websites. This SuiteApp also enables you to track and report on the costs paid by your company and your employees. This SuiteApp provides the following features:

- HR administrators can view the benefit plans of individual employees.
- HR administrators can view the costs of benefits plans that they can track the financial impact.
- Employees can view their own benefits plans through a Benefits Tracking portlet that they add to their dashboard.
- HR administrators can import benefit plan information directly from carriers into NetSuite instead of entering it manually.

For more information about Benefits Tracking, see the following topics:

- [Setting Up the Benefits Tracking SuiteApp](#)
- [Configuring Benefits Tracking](#)
  - [Assigning the Benefits Administrator Role](#)
  - [Creating a Custom Benefits Administrator Role](#)
  - [Confirming that Benefits Tracking Scripts Are Running](#)
  - [Creating Benefit Carriers](#)
  - [Creating Benefit Types](#)
  - [Creating Benefits](#)
  - [Assigning Benefits to an Employee](#)
- [Benefits Tracking Reports](#)
- [Importing Benefits Information from Carriers](#)
  - [Benefits Tracking Import Fields](#)
  - [Benefits Tracking CSV Examples](#)

## Setting Up the Benefits Tracking SuiteApp

This section describes how to set up the Benefits Tracking SuiteApp. It includes these sections:

- [Prerequisites for the Benefits Tracking SuiteApp](#)
- [Installing the Benefits Tracking SuiteApp](#)



**Note:** Currently, the Benefits Tracking SuiteApp supports only US and UK English languages.

## Prerequisites for the Benefits Tracking SuiteApp

To install the Benefits Tracking SuiteApp, you must have the following features enabled:

- Custom Records
- Server SuiteScript
- Client SuiteScript

## Installing the Benefits Tracking SuiteApp

Install the Benefits Tracking SuiteApp:

- Bundle Name: **Benefits Tracking**
- Bundle ID: 181105

This is a managed bundle and is automatically updated whenever there are updates. These issue fixes and enhancements are available after the SuiteApp is updated in your account.

For more information about installing SuiteApps, see the help topic [Installing a Bundle](#).

## Configuring Benefits Tracking

After you install the Benefits Tracking SuiteApp, you have a series of steps to perform to configure benefits tracking:

- [Assigning the Benefits Administrator Role](#)
- [Creating a Custom Benefits Administrator Role](#)
- [Confirming that Benefits Tracking Scripts Are Running](#)
- [Creating Benefit Carriers](#)
- [Creating Benefit Types](#)
- [Creating Benefits](#)
- [Assigning Benefits to an Employee](#)

## Assigning the Benefits Administrator Role

When you install the Benefits Tracking SuiteApp, a Benefits Administrator role is created in your account. You should assign the Benefits Administrator role to employees who oversee your benefits programs. For more information, see [Assigning Roles to an Employee](#).

**Note:** The Benefits Administrator role does not have full Benefits – Employee Benefit permissions by default. This is because this role is not intended to have full permissions to employee records. To import and assign employee benefits using this role, you may use [Staging](#) import or create a custom role.

## Creating a Custom Benefits Administrator Role

If you need to create a custom benefits administrator role to better suit your needs, make sure you assign the correct set and level of permissions. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

The minimum set of permissions for a custom role to access and update benefits on the employee record are listed below.

Permission Type	Permission	Level
Lists	Payroll Items	View
Custom Record	Benefits - Benefit Deduction	View

Permission Type	Permission	Level
	Benefits - Benefit Employer Contribution	View
	Benefits - Employee Benefit	Full
	Benefits - Translation	View

Custom benefits administrator roles that require edit access to your company's benefit records including benefit types, plans and carriers need a larger set of permissions with higher levels. These permissions are listed in the table below.

Permission Type	Permission	Level
Lists	Payroll Items	View
	Perform Search	View
	Subsidiaries	View
Setup	Control SuiteScript and Workflow Triggers per CSV Import	Full
	Custom Record Types	View
	Import CSV File	Full
Custom Record	Benefits - Benefit	Full
	Benefits - Benefit Carrier	Full
	Benefits - Benefit Coverage	Full
	Benefits - Benefit Deduction	Full
	Benefits - Benefit Employer Contribution	Full
	Benefits - Benefit Type	Full
	Benefits - Employee Benefit	Full
	Benefits - Staging	Full
	Benefits - System Propagate Cost	Full
	Benefits - Translation	View

## Confirming that Benefits Tracking Scripts Are Running

### To confirm that scripts are running:

1. Go to Customization > Scripting > Scripted Records.
2. On the Scripted Records page, click **Edit** beside Employee.
3. On the User Event Scripts tab, make sure that the **Deployed** box beside the **Benefits - Employee UE** script is checked.
4. On the Client Scripts tab, make sure that the **Deployed** box beside the **Benefits - Employee Client** script is checked.
5. Click **Save**.

## Creating Benefit Carriers

A benefit carrier is a third-party company that provides benefits to your employees, for which your company or your employees, or both, pay premiums. For each benefit that you create using the Benefits Tracking SuiteApp, you can specify a carrier to track these benefit providers.

### To create a benefit carrier:

1. Go to Setup > Benefits > Benefit Carriers > New.
2. On the Benefits Tracking — Carrier page, in the **Name** field, enter a unique name for the carrier.
3. Optionally, enter the following additional information for the carrier:
  - Address
  - Contact Email
  - Contact Phone
  - Website
4. Click **Save**.

## Creating Benefit Types

A benefit type is a category of benefit provided to an employee by a carrier, such as medical, dental, disability, or life insurance. When you install the Benefits Tracking SuiteApp, several default benefit types are populated for you:

- Life Insurance
- Accidental Death & Dismemberment (AD&D)
- Medical
- Dental
- Vision
- Long-Term Disability (LTD)
- Short-Term Disability (STD)
- Health Spending Account (HSA)

You can edit or delete these types or create your own to match your organization's situation.

### To create a benefit type:

1. Go to Setup > Benefits > Benefit Types > New.
2. In the **Name** field, enter a unique name for the type.
3. Click **Save**.

## Creating Benefits

A benefit is a specific, non-wage compensation item provided to an employee. When you create a benefit, you associate it with a benefit type, carrier, and coverage. You also specify the monthly employer and employee costs for the benefit so that you can track these figures for your company.

If you are using SuitePeople US Payroll, you can also associate the benefit with a payroll deduction and employer contribution so that the appropriate deductions and contributions are reflected on employees' paychecks. In this case, before you create benefits, you should create the deduction payroll items and the employer contribution payroll items that you plan to associate with those benefits. For more information, see the help topic [Creating Payroll Items](#).

**Note:** You should create new payroll items for use with benefits only, and not use those payroll items for other uses. If you add a benefits-related payroll item to an employee from the Payroll tab for another reason, the payroll item will be added to the employee's benefits. This could produce inaccurate results. Also, you should not associate a benefit with a payroll item which is derived from another payroll item.

### To create a benefit:

1. Go to Setup > Benefits > Benefits > New.
2. In the **Name** field, enter a unique name for the benefit.
3. Optionally, enter a description in the **Description** field to help distinguish this benefit from others.
4. Select a type from the **Type** dropdown list. To add a new type here, click the **Add** button. For more information about adding a benefit type, see [Creating Benefit Types](#).
5. Optionally, select a carrier from the **Carrier** dropdown list. To add a new carrier here, click the **Add** button. For more information about adding a carrier, see [Creating Benefit Carriers](#).
6. On the Coverage tab, add a coverage with the following steps:
  - a. Enter a name for the coverage in the **Benefit Coverage Name** field.
  - b. In the **Monthly Employer Cost** field, enter the amount that your company will pay for the benefit per employee every month.
  - c. In the **Monthly Employee Cost** field, enter the amount that the employee will pay for the benefit every month.

Note that the **Monthly Total Cost** field is updated with the sum of the two monthly cost fields.

**Note:** If you change either of the monthly cost fields after you have assigned this benefit to an employee, you are prompted to choose whether to apply this change to the affected employees.

7. If you use SuitePeople US Payroll, on the **Deduction** tab, select the payroll item to associate with this benefit. This represents the deduction that will be applied to employees' paychecks. You can only add one payroll deduction item to a benefit. Before setting up benefits, you should create the required deduction payroll items. For more information, see the help topic [Creating Payroll Items](#).
8. If you use SuitePeople US Payroll, on the **Employer Contribution** tab, select the payroll item to associate with this benefit. This represents the employer contribution that will be applied to employees' paychecks. You can only add one payroll employer contribution item to a benefit. Before setting up benefits, you should create the required employer contribution payroll items. For more information, [Creating Payroll Items](#).
9. Click **Save**.

## Assigning Benefits to an Employee

A benefit is a specific, non-wage compensation item provided to an employee. When you create a benefit, you associate it with a benefit type, carrier, and coverage. You also specify the monthly employer and

employee costs for the benefit so that you can track these figures for your company. After you have defined the benefits that employees in your organization can have, you assign them to employees.

### To assign a benefit to an employee:

1. Go to Lists > Employees > Employees.
2. Click **Edit** beside the employee you want to assign a benefit to.
3. Click the **Benefits** tab.
4. Select a benefit from the **Benefit** dropdown list.
5. Select a type of coverage from the **Coverage** dropdown list. The items here are the ones associated with the selected benefit.
6. When you select a coverage, the **Monthly Employer Cost** and **Monthly Employee Cost** fields are automatically populated with the values from the selected coverage. To override those values, click one or both of the fields and enter new values. When you change those fields, the **Monthly Total Cost** field is updated automatically.
7. Click **Add**.
8. Click **Save**.

## Benefits Tracking Reports

The Benefit Tracking SuiteApp includes three reports that you can use to retrieve, present, and analyze your benefits data:

- [Employee Benefit Coverage Report](#)
- [Employee Benefit Cost Report](#)
- [Employees Without Benefits Report](#)

You can also customize these standard reports in the Report Builder by clicking **Customize** on the results page. For more information, see the help topics [Report Builder Interface](#) and [Report Customization](#).

## Employee Benefit Coverage Report

The standard Employee Benefit Coverage report shows the benefit type, benefit, carrier, and coverage for each employee across all classes, departments, locations, and subsidiaries. You can use this report to quickly see an employee's benefits coverage.

To view the Employee Benefit Coverage report, go to Reports > Benefits > Employee Benefit Coverage.

The standard Employee Benefit Coverage report shows the following columns:

- Name (sorted ascending by default)
- Job (if you are using the Job Management feature)
- Supervisor
- Class
- Department
- Location
- Subsidiary

- Country
- Benefit Type
- Benefit
- Carrier
- Coverage

To customize this report and display it in the Report Builder, click **Customize**. For more information, see the help topic [Report Customization](#).

## Employee Benefit Cost Report

The standard Employee Benefit Cost report shows the benefit type, benefit, carrier, employee cost, employer cost, and total cost for each employee across all classes, departments, locations, and subsidiaries. You can use this report to quickly see how much an employee's benefits are costing both the company and the employee.

To view the Employee Benefit Cost report, go to Reports > Benefits > Employee Benefit Cost.

The standard Employee Benefit Cost report shows the following columns:

- Name (sorted ascending by default)
- Job (if you are using the Job Management feature)
- Supervisor
- Class
- Department
- Location
- Subsidiary
- Country
- Benefit Type
- Benefit
- Carrier
- Employee Cost
- Employer Cost
- Total Cost

To customize this report and display it in the Report Builder, click **Customize**. For more information, see the help topic [Report Customization](#).

## Employees Without Benefits Report

The standard Employees Without Benefits report shows the employees who do not have benefits assigned to them. To appear in this report, employees must:

- Be Active
- Have a Termination/Release Date in the future or blank
- Have no benefits assigned

To view the Employees Without Benefits report, go to Reports > Benefits > Employees Without Benefits.

The standard Employee Benefit Cost report shows the following columns:

- Name (sorted ascending by default)
- Job Title
- Supervisor
- Class
- Department
- Location
- Subsidiary
- Country (from Subsidiary)

To customize this report and display it in the Report Builder, click **Customize**. For more information, see the help topic [Report Customization](#).

## Importing Benefits Information from Carriers

You can quickly import benefits information for multiple benefit types, coverage, and carriers using the CSV Import feature. For more information, see the help topic [Importing CSV Files with the Import Assistant](#).

### To import benefits information from a carrier:

1. Go to Setup > Import/Export > Import CSV Records.
2. On the Import Assistant page, select **Custom Records** from the **Import Type** dropdown list.
3. From the **Record Type** dropdown list, select one of the following benefits-related record you want to import.
  - Benefit
  - Benefit Carrier
  - Benefit Coverage
  - Benefit Deduction
  - Benefit Employer Contribution
  - Benefit Type
  - Employee Benefit
  - Staging
4. Under **CSV File(s)**, choose **One File to Upload** and click **Select** then locate the file you want to upload.

To see some CSV file examples, read [Benefits Tracking CSV Examples](#).

5. Click **Next**.
6. On the Import Options page, select **Add or Update**.
7. Click the expand icon next to **Advanced Options**.
8. Check the **Run Server SuiteScript and Trigger Workflows** box then click **Next**.
9. On the Field Mapping page, confirm that the fields in your CSV file are mapped to the correct fields in the custom record. Click **Next**.

For more information about supported fields, see [Benefits Tracking Import Fields](#).

10. On the Save mapping & Start Import page, you can enter one or more of the following:

- a map name
- a description
- a script ID

To save the mapping, enter at least a map name and click **Save & Run**.

To run the import without saving, click **Run**.

11. To view the results of the CSV Import including any errors, click **CSV Response** on the Job Status page.

## Benefits Tracking Import Fields

The following describes the fields available for mapping for each Benefit record type using the CSV Import Assistant.

- [Benefit](#)
- [Benefit Carrier](#)
- [Benefit Coverage](#)
- [Benefit Deduction](#)
- [Benefit Employer Contribution](#)
- [Benefit Type](#)
- [Employee Benefit](#)
- [Staging](#)

### Benefit

The Benefit import record type lets you quickly enter information for multiple benefits. For more information, see [Creating Benefits](#).

Field	Description	Field is required
External ID	Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports.	No
Type	<p>The benefit type. This field can be any benefit type you created or any type installed with the SuiteApp by default:</p> <ul style="list-style-type: none"> <li>■ Life Insurance</li> <li>■ Accidental Death &amp; Dismemberment (AD&amp;D)</li> <li>■ Medical</li> <li>■ Dental</li> <li>■ Vision</li> <li>■ Long-Term Disability (LTD)</li> <li>■ Short-Term Disability (STD)</li> <li>■ Health Spending Account (HSA)</li> </ul>	Yes
Name	The unique benefit name.	Yes
Carrier	The carrier providing the benefit to your employees.	No

Field	Description	Field is required
Description	A description to help distinguish the benefit from others.	No

## Benefit Carrier

The Benefit Carrier import record type lets you quickly enter information for multiple benefit carriers. For more information, see [Creating Benefit Carriers](#).

Field	Description	Field is required
External ID	Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports.	No
Name	The benefit carrier name.	Yes
Address	The benefit carrier's address	No
Contact Email	The benefit carrier's email address.	No
Contact Phone	The benefit carrier's phone number.	No
Website	The benefit carrier's website.	No

## Benefit Coverage

The Benefit Coverage import record type lets you quickly add coverage and cost information for each benefit. For more information, see [Creating Benefits](#).

Field	Description	Field is required
External ID	Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports.	No
Benefit	The benefit plan name.	Yes
Name	The benefit coverage name. This corresponds to the value in the Benefits Coverage Name field of the Coverage subtab when setting up benefits.	No
Monthly Employer Cost	The amount the company pays per employee per month for the given benefit. The system uses an amount of 0 if mapped to an empty cell.	No
Monthly Employee Cost	The amount the employee pays per month for the given benefit. The system uses an amount of 0 if mapped to an empty cell.	No
Inactive	If set to Yes, the benefit is hidden in lists on records and fields. This corresponds to the Inactive box when creating benefits.	No, but if you do not include a mapping for this field, the system uses the default value, which is No.

## Benefit Deduction

The Benefit Deduction import record type lets you quickly associate benefits to their corresponding employee deduction payroll items. For more information, see [Creating Benefits](#).

Field	Description	Field is required
External ID	Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports.	No
Benefit Plan	The benefit plan name.	Yes
Payroll Item	The payroll item name associated with the employee's monthly deduction for the given benefit plan. This field must be an active payroll item on the Payroll Items page at Lists > Employees > Payroll Items.	Yes

## Benefit Employer Contribution

The Benefit Employer Contribution import record type lets you quickly associate benefits to their corresponding company contribution payroll items. For more information, see [Creating Benefits](#).

Field	Description	Field is required
External ID	Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports.	No
Benefit Plan	The benefit plan name.	Yes
Payroll Item	The payroll item name associated with the company's monthly contribution for the given benefit plan. This field must be an active payroll item on the Payroll Items page at Lists > Employees > Payroll Items.	Yes

## Benefit Type

The Benefit Type import record type lets you quickly enter information for multiple benefit types. For more information, see [Creating Benefit Types](#).

Field	Description	Field is required
External ID	Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports.	No
Name	The unique benefit type name. This name must be different from existing benefit types you already created or any type installed with the SuiteApp by default: <ul style="list-style-type: none"> <li>■ Life Insurance</li> <li>■ Accidental Death &amp; Dismemberment (AD&amp;D)</li> <li>■ Medical</li> <li>■ Dental</li> <li>■ Vision</li> <li>■ Long-Term Disability (LTD)</li> <li>■ Short-Term Disability (STD)</li> <li>■ Health Spending Account (HSA)</li> </ul>	Yes

## Employee Benefit

The Employee Benefit import record type lets you quickly enter benefit information for multiple employees. For more information, see [Assigning Benefits to an Employee](#).

Field	Description	Field is required
External ID	Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports.	No
Benefit	The unique benefit name.	Yes
Employee	The employee name. This field must point to an active employee on the Employees page at Lists > Employees > Employees.	Yes
Coverage	The benefit coverage name.	No
Monthly Employer Cost	The amount the company pays per employee per month for the given benefit. The system uses an amount of 0 if mapped to an empty cell.	No
Monthly Employee Cost	The amount the employee pays per month for the given benefit. The system uses an amount of 0 if mapped to an empty cell.	No

## Staging

The Staging import record type lets you quickly enter complete benefit information for multiple employees. Users assigned with the Benefits Administrator role can use staging import to assign benefits to employees even without having employee access. For more information, see [Assigning Benefits to an Employee](#).

Field	Description	Field is required
Carrier - External ID	Used as a unique identifier for the carrier record. You can specify any value that has not been used as the External ID in previous CSV imports.	Yes
Carrier - Name	The benefit carrier name.	Yes
Carrier - Address	The benefit carrier's address	No
Carrier - Contact Email	The benefit carrier's email address.	No
Carrier - Contact Phone	The benefit carrier's phone number.	No
Carrier - Website	The benefit carrier's website.	No
Type - External ID	Used as a unique identifier for the benefit type record. You can specify any value that has not been used as the External ID in previous CSV imports.	Yes
Type - Name	The unique benefit type name.	No
Benefit - External ID	Used as a unique identifier for the benefit record. You can specify any value that has not been used as the External ID in previous CSV imports.	Yes
Benefit - Name	The benefit plan name.	Yes
Benefit - Description	A description to help distinguish the benefit from others.	No
Benefit - Deduction Payroll Item External IDs	The payroll item which corresponds to the amount the employee pays per month for the given benefit. The value here must be the value defined in the Benefits Tracking External ID field on the payroll item page. This is an optional field and is useful if you want to link the benefit to the employee deduction payroll item.	No

Field	Description	Field is required
	 <b>Tip:</b> Use the pipe ( ) character as a delimiter if you want to include multiple payroll items such as from different subsidiaries. For example, you may enter multiple IDs as id_01  id_02  id_03.	
Benefit - Company Payroll Item External IDs	The payroll item which corresponds to the amount the company pays per employee per month for the given benefit. The value here must be the value defined in the Benefits Tracking External ID field on the payroll item page. This is an optional field and is useful if you want to link the benefit to the company contribution payroll item.	No
	 <b>Tip:</b> Use the pipe ( ) character as a delimiter if you want to include multiple payroll items such as from different subsidiaries. For example, you may enter multiple IDs as id_01  id_02  id_03.	
Coverage - External ID	Used as a unique identifier for the benefit coverage record. You can specify any value that has not been used as the External ID in previous CSV imports.	Yes
Coverage - Name	The benefit coverage name.	Yes
Coverage - Employer Cost	The amount the company pays per employee per month for the given benefit. The system uses an amount of 0 if mapped to an empty cell.	No
Coverage - Employee Cost	The amount the employee pays per month for the given benefit. The system uses an amount of 0 if mapped to an empty cell.	No
Employee Coverage- External ID	Used as a unique identifier for the employee coverage record. You can specify any value that has not been used as the External ID in previous CSV imports.	Yes
Employee Coverage- Employee External ID	Used as a unique identifier for the employee. You can specify any value that has not been used as the External ID in previous CSV imports.	Yes
Employee Coverage- Employee Name	The employee name. This field must point to an active employee on the Employees page at Lists > Employees > Employees.	No
Employee Coverage- Employer Cost	The amount the company pays per employee per month for the given benefit.	Yes
Employee Coverage- Employee Cost	The amount the employee pays per month for the given benefit.	Yes

## Benefits Tracking CSV Examples

The following examples show how you might structure files for importing benefits tracking information using the CSV Import Assistant.

- [Benefit](#)
- [Benefit Carrier](#)
- [Benefit Coverage](#)

- Benefit Deduction
- Benefit Employer Contribution
- Benefit Type
- Employee Benefit
- Staging

## Benefit

External ID	Type	Name	Carrier	Description
benefit_001	Medical	Regular Medical Plan	Green Corp.	Medical plan for regular employees.
benefit_002	Vision	Executive Vision Plan	Vision Corporation	Vision plan for executives.

## Benefit Carrier

External ID	Name	Address	Contact Email	Contact Phone	Website
carrier_001	Green Corp.	401 Island Parkway, Redwood Shores, CA	contact@example.net		www.example.net
carrier_002	Vision Corporation	1001 Sunset Blvd, Rocklin, CA	ask@example.com		www.example.com

## Benefit Coverage

External ID	Benefit	Name	Monthly Employer Cost	Monthly Employee Cost	Inactive
cov_001	Regular Medical Plan	Regular Medical	100	50	
cov_002	Executive Vision Plan	Executive Vision	100		

## Benefit Deduction

External ID	Benefit Plan	Payroll Item
deduct_001	Regular Medical Plan	Green Corp.(Employee)
deduct_002	Executive Vision Plan	Vision Corporation (Employee)

## Benefit Employer Contribution

External ID	Benefit Plan	Payroll Item
comp_contri_001	Regular Medical Plan	Green Corp.(Company)

External ID	Benefit Plan	Payroll Item
comp_contri_002	Executive Vision Plan	Vision Corporation (Company)

## Benefit Type

External Id	Name
bentype_001	Medical Regular
bentype_002	Eye Care

## Employee Benefit

External ID	Benefit	Employee	Coverage	Monthly Employer Cost	Monthly Employee Cost
emp_ben_001	Regular Medical Plan	John Smith	Regular Medical	100	50
emp_ben_002	Executive Vision Plan	Tamara Holden	Executive Vision	100	

## Staging

Carrier - External ID	Carrier Name	Carrier Web site	Type - External ID	Type - Name	Benefit - External ID	Benefit - Name	Coverage - External ID	Coverage - Name	Employee Coverage - External ID	Employee Coverage - Employee External ID	Employee Coverage - Employee Name	Employee Coverage - Employee Cost	Employee Coverage - Employee Cost
carrier_001	Green Corp.	www.example.net	bentype_001	Medi cal	benefit_001	Regula r Medic al Plan	cov_001	Regul ar Me dic al	payroll_emp_001	emp_0076	John Smith	100	50
carrier_002	Vision Corporation	www.e xample.com	bentype_002	Vision	benefit_002	Executi ve Visio n Plan	cov_002	Execu tive Vi sion	payroll_emp_002	emp_002	Tamara Holden	100	
carrier_003	Green Corp.	www.e xample.net	bentype_003	Medi cal	benefit_003	Regula r Medic al Plan	cov_003	Regul ar Me dic al	payroll_emp_003	emp_002	Tamara Holden	100	50

# Workforce Case Interaction

The Workforce Case Interaction SuiteApp lets your company trace an ill employee's interactions with others. Interaction with employees, customers, and vendors is tracked during times where highly contagious infections or viruses pose a threat to workforce health and safety.

When an employee self-reports an illness to an HR professional, the HR professional or other authorized user can log an employee case. Using the reporting employee's data stored in NetSuite, you can then generate a list of possible interactions that employee may have had. The list shows the employees who have been identified as potentially having some in-person contact with the employee in question, which could include the following:

- A common location
- A time entry in a common location
- A relationship in the organization, such as supervisor, direct report, or reporting to the same supervisor
- A project-based relationship
- A common calendar event

If you are aware of interactions that were not represented by the data in your account, you can add them manually.

You can export this list to a comma-separated values (CSV) file or other format.



**Note:** The Workforce Case Interaction SuiteApp does not support the SuitePeople Effective Dating feature. The current day version of the employee record is used to determine potential contacts.

For more information about the Workforce Case Interaction SuiteApp, see the following topics:

- [Setting up the Workforce Case Interaction SuiteApp](#)
- [Creating an Employee Case](#)
- [Adding Interactions for an Existing Employee Case](#)
- [Viewing and Exporting Interactions for an Employee Case](#)
- [Generating an Email Distribution List for an Employee Case](#)

## Setting up the Workforce Case Interaction SuiteApp

This section describes how to set up the Workforce Case Interaction SuiteApp. It includes these sections:

- [Prerequisites for the Workforce Case Interaction SuiteApp](#)
- [Installing the Workforce Case Interaction SuiteApp](#)
- [Allowing Roles to Access the Workforce Case Interaction SuiteApp](#)



**Note:** Currently, the Workforce Case Interaction SuiteApp supports only the US English language.

## Prerequisites for the Workforce Case Interaction SuiteApp

Before you install the Workforce Case Interaction SuiteApp, ensure that the following features are enabled in your NetSuite account. If you do not see these features on the Enable Features page, contact your NetSuite account manager:

- Custom Records
- Server SuiteScript
- Client SuiteScript

## Installing the Workforce Case Interaction SuiteApp

As an administrator, install the SuiteApp using the following details:

- Bundle Name: Workforce Case Interaction Bundle
- ID: 330007

For more information about installing SuiteApps, see the help topic [Installing a Bundle](#). The Workforce Case Interaction SuiteApp is a managed bundle and is automatically updated whenever fixes and enhancements are available.

## Allowing Roles to Access the Workforce Case Interaction SuiteApp

The Workforce Case Interaction SuiteApp allows the capture of potentially sensitive information. Therefore, the installation process gives access to the SuiteApp to the Administrator role only, by default. After installation, you grant access to other roles in your company that you want to be able to use the SuiteApp. For example, you might give access to your Chief People Officer (CPO) and Human Resources Generalist roles.

If there are several people in your organization with the same role, you can limit SuiteApp access to only some of them. You can do this by creating a custom role specifically for this SuiteApp, and then assign it to those people. For information about creating a custom role, see the help topic [Customizing or Creating NetSuite Roles](#).

You should review all of the topics for this SuiteApp before allowing access to the SuiteApp to any roles.



**Note:** This SuiteApp uses full NetSuite administrator permissions to generate the list of potential contacts. This is true regardless of the restrictions on the role that you are using to access the SuiteApp. If you use NetSuite OneWorld and your current role can view only some of your subsidiaries, note the following. The generated list still has all interactions in your company, but you can only manually add interactions from the subsidiaries you can access. Also, you can only create employee cases for subsidiaries you have access to. If the SuiteApp user must create cases for all employees, regardless of subsidiary, you must create a custom role. Check the **Do Not Restrict Employee Fields** box for the role, and then assign that role to the user.

### To allow roles to use the Workforce Case Interaction SuiteApp:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Locate the **Contact Tracing Permitted Role** custom record and click **List**.
3. On the Contact Tracing Permitted Role List page, click **New Contact Tracing Permitted Role**.
4. Select the role you want to give access to from the **Role With Access To Contact Tracing App** list.
5. Enter any notes you would like to include in the **Title** and **Memo** fields.
6. Click **Save**.

You can allow access to the Employee Case Logging page for a role that does not have access to the Classic Center or Accounting Center. To allow access, add a center link and associate it with the URL for the page.

### To find the URL for the Employee Case list page:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Locate the **Employee Case** custom record and click the **List** link.
3. Copy the URL of the page that appears.

For information about adding center links, see the help topic [Creating Center Links](#).

## Creating an Employee Case

When you receive a self-report of illness from an employee, you can use the Workforce Case Interaction SuiteApp to create an employee case. Then you can determine what contact that employee has had with others. You specify a start and end date that represent the period of the case, or the range of dates you want to track.

When or after you create a case, you can have the SuiteApp generate a list of possible interactions for the self-reporting employee. After this generation step, you can remove, exclude, or edit those interactions if you know that they are not relevant.

The contact list is determined by the employee's:

- Location
- Time entries
- Direct team members
- Project team members
- Participation in calendar events



**Note:** If an employee's record is active but they are terminated, they will be included in any contact tracing list.

### To create an employee case:

1. Depending on the role you are using, go to one of the following:
  - Lists > Employees > Employee Case
  - Payroll and HR > Lists > Employee Case
2. On the Employee Case List page, click **New Employee Case**.

3. On the Employee Case entry page, select the employee's name from the **Name** list. The Employee Information section is populated with data from the employee record so that you can confirm that you have selected the correct employee.
4. If you have updated values than those populated from the employee record, you can edit the **Email**, **Phone**, and **Mobile Phone** fields. Note that these edits are on the employee case only. They do not change the employee record.
5. Enter a **Start Date** and **End Date** that represent the period of the case or the range of dates you want to track.
6. Enter a **Reported Date**. This is the date when the employee self-reported, not the date when you are creating this case. This field defaults to today.
7. Select a status for this case from the **Status** list: Identifying Contacts, Monitoring, or Resolved. The status defaults to Identifying Contacts.
8. Optionally, to add any notes to this case, click the **Notes** subtab, enter information in the Title and Memo fields, and click **Add**.
9. Optionally, to attach any supporting files to the case, click the **Files** subtab, click **New** to select a file, and then click **Add**.
10. To generate a list of possible interactions based on data in NetSuite, click **Generate Possible Interactions**. In the warning popup that appears, click **OK**. If any interactions were found, they appear at the bottom of the case entry page. The employee case is saved as part of this action.  
Note:



**Note:** This is a one-time action. After you click **Generate Possible Interactions**, it no longer appears on the Employee Case page.

11. To generate a list of emails for notifications, click **Edit** on the employee case page and then click **Generate Email Distribution List**.
12. Click **Save**.

## Adding Interactions for an Existing Employee Case

The Workforce Case Interaction SuiteApp lets you manually add additional interactions between the employee in question and other employees. You can manually add interactions with other NetSuite entities, such as vendors, customers, contacts, and partners. You can also add interactions between the employee and people who are not in your company or account. You add interactions when you create or edit an existing case.

### To add interactions to an employee case:

1. Go to Lists > Employees > Employee Case.
2. Click **Edit** beside the case that you want to add interactions to.
3. On the **Interactions** subtab, click a new row. Then, select an entity that might have interacted with the employee case from the **NetSuite Entity** list.
4. The **Name**, **Type**, **Email**, **Phone**, and **Mobile Phone** fields are populated from the entity record. However, you can edit these fields if you have updated information.
5. To add an interaction with a person who is not in your NetSuite account, click **New Interaction**. Enter a **Name** and other relevant information (including Notes and Attachments), and then click **Save**.
6. To include this interaction in any reporting, check the **Include** box. Then, select a **Location**, if relevant.

7. Select the boxes of the possible interactions with the employee case.
8. Click **Add**.

You can also add interactions when viewing a case, or from the Interaction List page by clicking **New Interaction**.

## Viewing and Exporting Interactions for an Employee Case

The Workforce Case Interaction SuiteApp lets generate and add to a list of interactions between the employee in question and other employees. You can also generate and add to a list interactions with NetSuite entities, such as vendors, customers, contacts, and partners.

You can view the interactions list on a List page, and then export it to other formats for use in other applications.

### To view and export the interaction list for an employee case:

1. Go to Lists > Employees > Employee Case.
2. Click **View** or **Edit** beside an existing case.
3. In the Interactions subtab, click the **Click here** link. The Interactions list for that case appears.
4. On the Interaction List page, you can edit or view an interaction to confirm any of the information in it for accuracy.
5. If you use inline editing on the List page, you can edit the Include box and the Remarks field. You can also edit any of the possible interaction boxes for a particular interaction.
6. To export the list to a comma-separated values (CSV), Microsoft Excel, or PDF file, click the appropriate button.

## Generating an Email Distribution List for an Employee Case

The Workforce Case Interaction SuiteApp lets you generate a list of possible interactions between an employee in question and other employees or entities. You can also generate a list of relevant email addresses for notification purposes.

### To create an email distribution list for an employee case:

1. Go to Lists > Employees > Employee Case.
2. Click **Edit** beside the employee case you want to generate a distribution list for.
3. On the Interactions subtab, click **Generate Email Distribution List**. The relevant email addresses for all interactions that have been marked as included appear in the Distribution List area.
4. Select the text in the **Distribution List** box and then copy and paste it into your email application.



**Note:** This distribution list is not saved when you close the subtab or browser, even if you save the employee case.