Employee Center Guide

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The Employee Center

In the Employee Center, you can view, create, and maintain information related to your job. For example, you can create tasks and events. You can enter purchase requests and expense reports and monitor the approval status of both. If you track time, you can enter time on a daily or weekly basis. If your company uses SuitePeople U.S. Payroll, you can view your paycheck history and Form W-4 information. If your company uses the Time-off Management feature, you can book time off and track your time-off balances.

To get access to more transactions or lists in the Employee Center, contact your Administrator to request customization of the Employee Center role or to assign you additional roles.

To learn more, explore these topics:

- Employee Center Basics - Learn how to navigate the Employee Center, how to customize the look of your dashboard, how to set personal preferences, and how to change your NetSuite role.
- Logging in to NetSuite - Learn how to log in to NetSuite, information about two-factor authentication (2FA), and how to troubleshoot login issues. You will also find directions including how to change your password, update your security questions, and how to update your 2FA settings.
- Employee Center Self-Service - Learn how to use the Employee Center for day-to-day tasks, such as entering expense reports, submitting time entries, requesting time-off, or managing your business contacts.
- Employee Management - If you are a supervisor or manager, learn how you can use the Employee Center to respond to employee requests and manage your team.
- Customizing the Employee Center for Your Organization - Learn how to publish an Employee Center dashboard for your organization.

Employee Center Basics

Understanding Centers, Roles, and Accounts

Centers

A center is a set of tabbed pages that adjusts accordingly to your role. There are different types of centers in NetSuite, including standard centers, and a special NetSuite Account Center. Each NetSuite center provides the pages and links that you need to do your job. For example, the Accounting Center's tabbed pages provide data and links that are relevant for Accountants, Bookkeepers, Payroll Managers, and Clerks, while the Employee Center's tabbed pages enable employees with to access their information. They can submit requests (such as time-off requests and purchase orders) for approval, submit timesheets, and so on.

Each tabbed page displays a collection of real-time data called a dashboard. You can personalize your dashboard and see dashboards that are published by administrators.

When you log in to NetSuite, the system determines your last used role and account, or a default role that you set up, and displays the associated center. For more information, see Roles and Accounts.

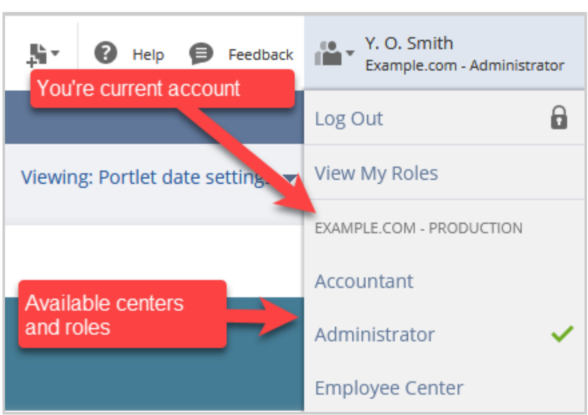
Accessing the Employee Center

You can have access to different centers within one account. For example, in your company's account, you might have access to the Employee Center and the Accounting Center.

To switch to a different center:

1. Hover over your name at the top right of any NetSuite page.

   A list of centers and roles available for your current account displays under your account's name.

2. If the center is in your current account, click the center name to switch to that center. For example, click Employee Center to switch to the Employee Center.
3. If the center you want to switch to is under a different account, click the account's name.

   That center's Home page appears, and you see only the links or tabs appropriate for that center.

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Roles and Accounts

A role is a defined access configuration that is assigned to you. Roles and their permissions determine the pages that you can see in the NetSuite interface and the tasks that you can complete. You may have more than one role assigned to you. If you have more than one role, you can switch among those roles and select a default role in your account to use when logging in.

An account is a place where you work in NetSuite. There are multiple types of accounts provided by NetSuite that you can use, such as production, sandbox, development, and release preview. The live production account is the main account where you do the daily work necessary to run your business. You can access your production account by going to system.netsuite.com and entering your login details.

You might have multiple accounts and multiple roles within each account.

> **Note:** Only administrators can set up and manage roles and grant access to accounts.

Changing Your Role

A role defines the access that you have to information in NetSuite. The Employee Center role provides access to a limited set of information, including your employee information. You may or may not be assigned other NetSuite roles. For more information about your roles, contact your NetSuite administrator.

To change your role:

1. Locate your name and role at the top right of any NetSuite page.

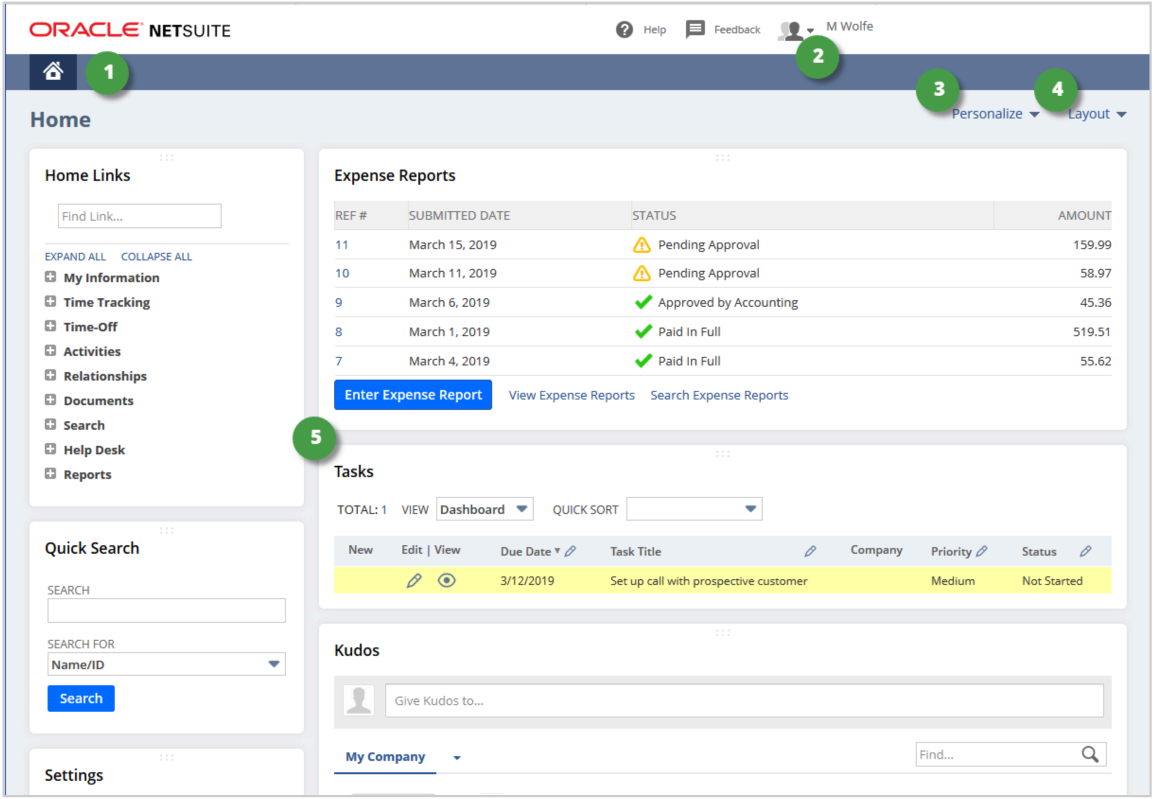
   

   - Hover to open the Change Roles list, **or**
   - Click to open the My roles page.
2. You will only see the list of your roles in your current account.
   - If the role is in your current account, click the role name to switch to that role.
   - If the role you want is in a different account, click the account name, then select the role.

   That role's Home page appears, and you see only the links or tabs appropriate for that role.

Dashboard Overview

When you log in to your Employee Center, NetSuite opens your home page. Your home page is a dashboard that is made up of various portlets. Each portlet contains different content based on real-time data. The specific content that you can see depends on your company and the features that your company has enabled. Your company might also create its own custom portlets. A typical dashboard in the Employee Center looks like this:



1	Click the Home button from anywhere in the Employee Center to go to your dashboard.
2	Use the roles dropdown list to change to a different role in NetSuite. For more information, see the help topic Changing Your Role.
3	Use the Personalize dropdown list to add more portlets to your dashboard. For more information, see Customizing the Dashboard.
4	Use the Layout dropdown list to change how the portlets are organized on the dashboard. For more information, see Customizing the Dashboard.
5	The dashboard is made up of various portlets that show you real-time data or link to other parts of the Employee Center. For more information, see Portlets Overview.

Portlets Overview

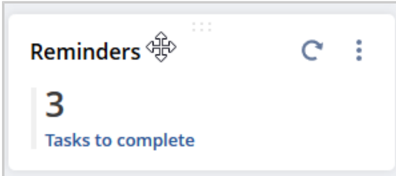
Portlets display real-time data from different parts of NetSuite. Portlets can be moved around and customized to suit your preferences, and you can add portlets and remove portlets as needed.

Using Portlets

Portlet controls are hidden until you move your pointer over the portlet.

If a dashboard contains a portlet that is extremely slow to load, the first time the portlet opens, NetSuite might display a popup suggesting that you minimize the portlet to speed dashboard loading time.

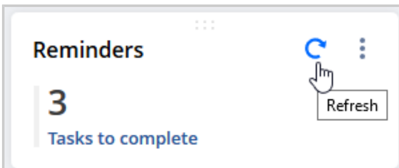
- To minimize a portlet, click its title bar. When you move your pointer over the title bar, it changes to crossed arrows as shown.



Click the title bar again to expand the portlet's content.

Portlets with content that is calculated from current data include a Refresh icon on the right of the title bar.

- Click the icon to refresh the portlet content and ensure it includes the latest data.



Employee Center Portlets

NetSuite provides portlets that you can add to your Employee Center dashboard. Some portlets are available regardless of the features that are enabled in your organization's NetSuite account, and some portlets are feature dependent. Your company might have added its own custom portlets to the Employee Center as well.

Standard Portlets

The following standard portlets are included in the Employee Center regardless of the features that are enabled in your organization's NetSuite account. Some of these portlets appear the first time that you log in to the Employee Center, and other portlets are accessible from the Personalize Dashboard palette.

Portlet	Description
Calendar	Lists activities for a selected period ordered by date and time, with links to drill down into individual activity records. 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. You can click the **Set Up** menu option for the portlet to display a popup where you can define the types of activities to display in the calendar. For more information see Calendar.
Custom Search	(Can display up to six on the Home page.) Shows results from a saved search. In the portlet, click **Set Up** to select the saved search, specify a custom title for the portlet, the number of results to display, whether to drill down into search results in the portlet or on a new page, and, if the Inline Editing feature is enabled, whether to enable inline editing of search results.

Portlet	Description
	Note: 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. For more information, see Saved Searches.
Employee Center — Home Links	Provides links to different records within your Employee Center, such as documents, contacts, and timesheets.
List	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. In the portlet, click **Set Up** to select a type of record and the number of records shown. **Note:** 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.
Quick Search	Shows a form where you can quickly search for records of a selected type, using one selected filter field and entered keywords. In the portlet, click **Set Up** 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 dropdown. For more information, see Quick Search.
RSS/Atom Feed	(Can display up to two.) Shows RSS or Atom feed URL content, from an external website or HTML document. In the portlet, click **Set Up** 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.
Recent Records	Shows a list of records that you have recently created, modified, or viewed. 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.
Recent Reports	(Available on the Reports tabbed page.) Shows a list of reports that you have recently created, modified, or viewed. In the portlet, click the report name to view the individual report.
Reminders	Shows important tasks of selected types, usually that are past due or soon due to be completed. In the portlet, click **Set Up** 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. For more information, see Reminders.
Report Snapshots	(Can display up to 10.) 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. In the portlet, you can select a date range for data and click thumbnails to choose among chart types for graphical data. You can click **Set Up** to select the type of display and other layout options, including chart themes. You also can 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.

Portlet	Description
	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. Report snapshot list amounts are rounded to the nearest whole number and do not display decimal places.
Search Form	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. In the portlet, click **Set Up** to select the search form to be used. Click **Full Search** to switch to the default search page for the selected record type. Click **Edit** to open the definitions page for the selected search form and make edits.
Settings	Shows links to user-level setup tasks. **Important:** The contents of this portlet are system-defined. This portlet cannot be removed or modified.
Shortcuts	Shows links to selected pages, so you can navigate quickly to frequently used pages. In the portlet, click **Set Up** to reorder the listing of existing shortcut links or click **New Shortcut** to add a shortcut, if you know the URL of the page. If you do not know the URL, go to that page and click More > Add to Shortcuts in the upper right corner of that page.
Tasks	Shows a list of upcoming CRM tasks assigned to you, with links to view, and if you have permission, to edit, individual records. In the portlet, select a view and a sorting method, and click **Set Up** to define the number of tasks shown. For more information, see Tasks.
Trend Graphs	(Can display up to five.) Shows a chart of key performance indicator (KPI) data with a time-based X axis. 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 dropdown list. Click **Set Up** 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.

Feature-Dependent Portlets

The following portlets appear on your Employee Center dashboard only if certain features are enabled in your organization's NetSuite account.

Portlet	Description	Required Feature
Expense Reports	Shows you the status of up to five of your latest submitted expense reports. You can also click the **Enter Expense Report** button to enter new expense reports. Links to your expense reports are not available from the Home Links portlet. For more information, see Expense Reporting.	Expense Reports
Goals	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. For more information, see Viewing Goals. On the Manager dashboard, the portlet shows your direct reports' goals that require approval or reflection and goals that are overdue. Managers can also	Performance Management

Portlet	Description	Required Feature
	view the progress and time elapsed for their direct reports' goals in progress. For more information, see Viewing the Goals of Your Direct Reports.	
Kudos	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. For more information, see Kudos.	Kudos
My Team	Displays a list of your direct reports, if you are a manager. This portlet appears on the Manager view of your Employee Center dashboard. For more information, see Using the Manager Dashboard. If you are a manager, you can also view your direct reports' employee timelines. The employee timeline displays an employee's key milestones and career changes in chronological order. For more information, see Viewing Employee Timelines. If your company enables the Employee Change Requests feature, managers can create employee change requests for their direct reports. For more information, see Employee Change Requests.	Employee Center Dashboard Publishing
News Items	Displays company news items.	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. For more information, see Payroll and Banking Information.	Payroll
Purchases	Shows you the status of up to five of your latest submitted purchase requests or requisitions. You can click the **Enter Purchase Request** button or the **Enter Requisition** button to enter new purchase requests or requisition. Links to your purchase requests or requisitions are not available from the Home Links portlet. For more information, see Purchase Requests and Requisitions.	Purchases or Requisitions
Time-Off	Provides you with a quick view of the time-off you have for the rest of the year, along with the time-off that you have taken and the time-off that you have booked. You can also click **Book Time-Off** to schedule more time off. For more information, see Time-Off.	Time-Off Management

Customizing the Dashboard

You might be able to customize your dashboard to work best for you. Change the layout and colour, add portlets that you need, remove portlets that you do not need, and rearrange the dashboard so that you know exactly where to find everything.

> **Note:** If a lock icon appears beside the word **Home** on the top left side of the dashboard, you cannot customize the dashboard.

To change the layout of the dashboard:

1. At the top of the dashboard, click **Layout**.
2. Click a layout style.

To change the colors and fonts:

1. In the Settings portlet, click **Set Preferences**.
2. Click the **Appearance** tab.
   - To change the color, in the **Color Theme** dropdown list, select a color.
   - To change the font, in the **Screen Font** dropdown list, select a font.
3. Click **Save**.

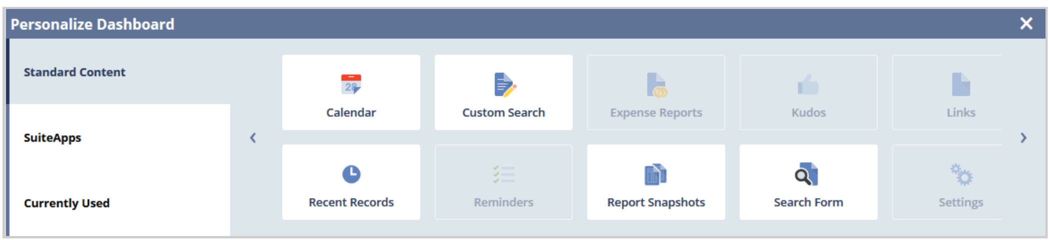
To move a portlet:

1. Move your pointer to the title of the portlet.
2. When the pointer changes to crossed arrows, drag the portlet to its new location.

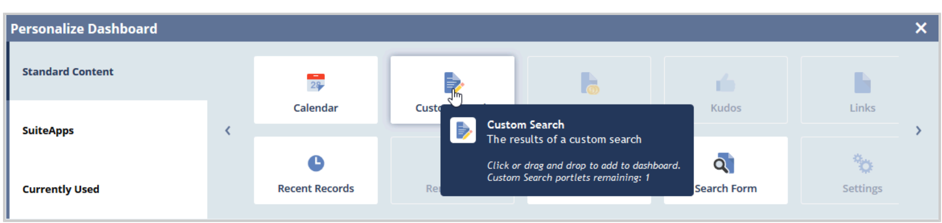
Portlet content might change if you move a portlet from a wide column location to a narrow one.

To add a portlet to a dashboard:

1. Click the **Personalize Dashboard** link in the Settings portlet or the **Personalize** link in the top right corner of the page. The **Personalize Dashboard** palette opens at the top of the page.

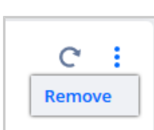
   

   The **Currently Used** tab shows the portlets that are already on your dashboard.
2. In the other tabs, click a portlet icon to add it to the top the page. The portlet automatically selects the column with the width that is best suited to its content. If you prefer, you can drag the portlet to a specific location.
   - The available portlet tabs are **Standard Content**, **Report Snapshots**, and **Trend Graphs**. You may not have permission to add portlets from every tab.
   - Rest your pointer over a portlet icon to see popup help.

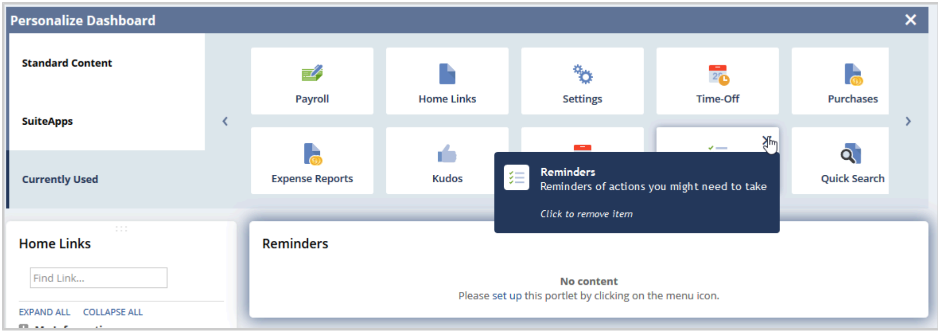
   

To remove a portlet from your dashboard:

1. Do one of the following options:
   - Click **Remove** in the portlet menu.

- Click the portlet icon in the **Currently Used** tab of the Personalize Dashboard palette. As you move your pointer over the portlet icons, the corresponding portlet on your page is outlined in red.



> **Note:** If you remove an Activities, Reminders, Key Performance Indicators, or Report Snapshot portlet from your home page, alert emails no longer include information from the removed portlet.

Some portlets cannot be removed from a dashboard. One of these is the Settings portlet. Your administrator can also prohibit you from deleting a portlet.

Setting Personal Preferences

The Set Preferences page includes settings for most aspects of your NetSuite account. If you have multiple roles in NetSuite, the preferences you set in one role do not always affect your other NetSuite roles. For example, your preferences for date formats affect all of your roles, but your preferences for color theme affect only the role that you are currently using. If a preference impacts all of your roles, the text "This setting applies to all your roles" appears beneath the setting.

Your account administrator might set some default preferences for you. The personal preferences you set normally take precedence.

To set personal preferences

1. From the home page of the Employee Center, in the Settings portlet, click **Set Preferences**.
2. On the Set Preferences page, click a subtab to edit your preferences for a specific area of NetSuite.
   - In the **General** tab, you can change message settings, the language, date and time format, the default number of rows that display in lists, and more.
   - In the **Appearance** tab, you can change the color theme, fonts, chart themes, your landing page, and settings for entry forms.
   - In the **Transactions** tab, you can change settings for transactions, including auto-fill settings, how transactions are sorted, warning messages, and printing.
   - In the **Analytics** tab, you can customize how your reports are generated, change search settings, set how PDFs are generated, set the CSV character encoding defaults, and more.
   - In the **Activities** tab, you can change settings for your calendar, phone calls, and tasks.
   - In the **Alerts** tab, you can set when you receive alert emails. You can also set up alerts for saved searches.
3. When you are finished setting preferences, click **Save**.

Tip: To learn more about a setting, click the label for the setting to see field help.

Your Employee Profile

If your role is assigned the correct permissions, you can view information that Human Resources has on file for you, such as contact information, job information, education, and compensation information. To view your profile, on the **Employee Center – Home Links** portlet, under **My Information**, click **My Profile**.

Editing Your Information

Your employee profile provides a record of your phone numbers, addresses, and emergency contact information.

Your employer enters this information on your main employee record. When your information changes, you can make changes in the Employee Center, and these changes are updated on your main employee record. If your employee profile includes a photo, contact your administrator to add or change your photo.

To edit your information:

1. On the **Employee Center – Home Links** portlet, under **My Information**, click **Edit Profile**.
2. Click **Edit**.
3. Browse the **Phone Numbers**, **Address**, **Emergency Contacts**, and **Banking Information** subtabs for information that needs to be updated.

   Note: Depending on the features available in your account, you might not see all possible subtabs.

4. To record your updated information, click **Save**.

Logging in to NetSuite

Watch the following video for information about how to log in and out of NetSuite.

Logging In and Out of NetSuite

Authentication is the process of verifying your identity when you log in to an application. This section contains procedures describing the ways that your identity can be authenticated when you log in to NetSuite.

The most familiar form of authentication occurs when you log in to the NetSuite UI with your email address and your password, which are your user credentials. Depending on the role or roles you are assigned by your account administrator, you might also be required to provide a second factor for authentication, known as two-factor authentication, or 2FA.

See the following sections for more information about how your identity is authenticated when you log in to NetSuite.

- Logging in to the NetSuite UI

  This section contains the following topics:

  - Supported Browsers for NetSuite
  - Your User Credentials
  - Finding Your Settings Portlet
  - Change Email Link
  - Change Password Link
  - Setting Up Security Questions
  - Update Security Questions Link
  - If You Forget the Answers to Your Security Questions
  - Getting Access When You Forget Your Password
  - My Login Audit Portlet
- Logging In Using Two-Factor Authentication (2FA)

  This section contains the following topics:

  - Set up Your Preferences for Two-Factor Authentication (2FA)
    - Complete Your 2FA Setup
    - Supported Authenticator Apps
    - Troubleshoot Authenticator Apps
  - Using 2FA
    - The Logging in Page for 2FA
    - Managing Your Trusted Devices
    - Reset Your 2FA Settings
    - Backup Codes for Two-Factor Authentication (2FA)

Logging in to the NetSuite UI

This section contains information about the most basic way you can log in to the NetSuite UI, using your email address and password, which are your user credentials. In this section, you will also find directions for locating the Settings portlet, which contains links for changing your email address, changing your password, updating your security questions, and other tasks. You can also find information about creating strong passwords, answering security questions, and what to do if you forget your password.

See the following topics for more information:

- Supported Browsers for NetSuite
- Your User Credentials
- Finding Your Settings Portlet
- Change Email Link
- Change Password Link
- Setting Up Security Questions
- Update Security Questions Link
- If You Forget the Answers to Your Security Questions
- Getting Access When You Forget Your Password
- My Login Audit Portlet

Supported Browsers for NetSuite

Important: This topic describes browser support only for the NetSuite application, which is different from the browser support for Commerce websites. For more information, see the help topic Supported Browsers for Commerce Websites.

Note: Some ad blocker plug-ins can prevent you from creating pivot tables or charts in SuiteAnalytics Workbook, regardless of the browser you use to access NetSuite. To avoid errors with SuiteAnalytics Workbook, deactivate these plug-ins. For more information about SuiteAnalytics Workbook, see the help topic SuiteAnalytics Workbook Overview.

Browsers by Platform

NetSuite is supported in the following browsers and operating systems:

Browser	Versions	Platform
Google Chrome	Two most recent stable major versions.	Windows 10 Mac OS 10.15 or newer
Microsoft Edge (Chromium-based)	Two most recent stable major versions.	Windows 10
Mozilla Firefox	Two most recent stable major version. The latest stable Extended Support Release (ESR)	Windows 10 Mac OS 10.15 or newer
Safari[1]	13.1 or newer	Mac OS 10.15 or newer

[1] Cookies settings may affect the ability to use this browser when accessing SuiteAnswers. If you encounter any issues, open your Safari browser, go to Safari > Preferences > Privacy and turn off the Prevent cross-site tracking option. Then close your browser, reopen it, and access SuiteAnswers through NetSuite.

Touch Screen Device Support

Most user interface actions are supported on touch screen devices. However, in rare cases you may encounter minor issues.

Mobile Devices

There is a NetSuite app for mobile devices. For information about system requirements for mobile devices, see the help topic System Requirements.

Your User Credentials

The combination of your email address and your password are your user credentials for accessing NetSuite. Your email address is considered, and often referred to, as your username in NetSuite.

If you have access to NetSuite accounts for more than one company, you can either use the same username for all of them, or you can use a different username for each company.

- If you use the same user credentials for all companies, all of your roles in all companies are listed on the My Roles page and the Change Roles list. Hover over the upper right corner to display the Change Roles list. The list displays your roles in the current account. You can select a different role from the list, or select **View My Roles** to open the My Roles page. Click the name of the role name you want to switch to. If the desired role is in a different account, you must first switch to that account from the My Roles page.
- If you use separate user credentials for different companies, you must log out and then log in again to switch to another company.

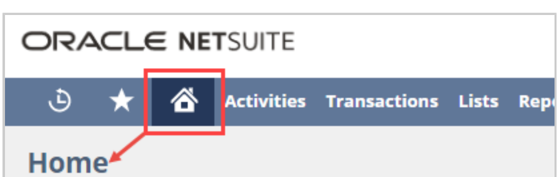
> **Important:** You are uniquely identified in NetSuite by your email address, it is your username. There is a one-to-one relationship between username and password. That is, one username can only have one password, no matter how many accounts or companies you can access with that username.

Finding Your Settings Portlet

Use the links in the **Settings** portlet on your Home page to change your password and to perform other setup and configuration tasks in NetSuite.

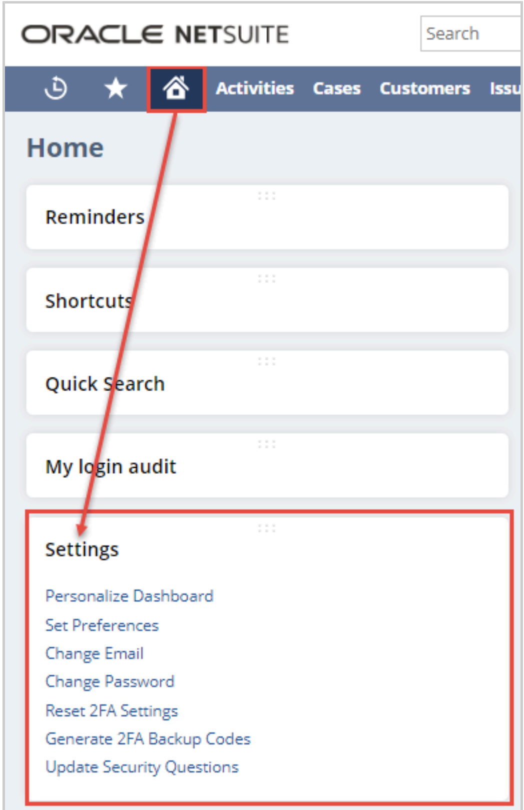
To find your Settings portlet:

1. Click to verify that you are on the Home page, also called the dashboard.

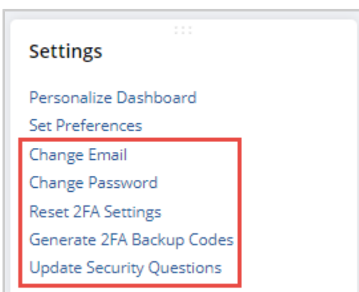


> **Important:** The Settings links you are looking for are not in the list that appears when you hover over the Home icon.

2. The **Settings** portlet can appear anywhere on a customized Home page. By default, the **Settings** portlet is located on the left side of the page. You might need to scroll down to see it.



3. Click the appropriate link for the task you need to complete.



For more information about these links, see the following topics:

- Change Email Link
- Change Password Link
- Reset Your 2FA Settings
- Backup Codes for Two-Factor Authentication (2FA)
- Update Security Questions Link

Note: If you cannot find your Settings portlet, contact your account administrator.

Change Email Link

The email address you use to log in to NetSuite is also used for email notifications and other communications from administrators. You can use the Change Email link in the **Settings** portlet to change your email address.

Important: Before you change your email address in NetSuite, verify that this change is OK with your account administrator.

To change your email address:

1. Find the **Settings** portlet on the Home page. If you cannot locate the **Settings** portlet, see Finding Your Settings Portlet.

   Tip: The **Settings** portlet can appear anywhere on a customized Home page (or dashboard). By default, it is located on the left side, and you might need to scroll down to see it.

2. Click **Change Email**.
3. In the **Current Password** field, enter the password you currently use to log in.

   You must provide your password when you are changing your email address, to ensure the security of your account.

4. Enter the new email address in the **New Email Address** field, and re-enter the same address in the **Confirm New Email** field.
5. Check the **Just This Account** box to change your login information for only the account to which you are currently logged in. This option only applies if you have access to multiple NetSuite accounts.

   If you clear this box, you can log in to all of your NetSuite accounts with the updated email address you entered.

6. Click **Save**.

After you have saved the change to your email address:

- A notification message is sent to your current email address.
- A validation message is sent to your new email address, with a link that you must click to complete the change.
- You must continue to use the current email address to log in to NetSuite, until you have clicked the validation link to confirm the change.
- The new email address is listed in the **Pending Email Change** field on the Change Email page, until either you have clicked the validation link, or the link has expired.

The times in the notification and validation messages are based on the time zone preference that you have set at Home > Set Preferences.

> ⚠ **Important:** If you receive a notification message about an email change that you did not initiate, you should alert your account administrator to a possible security issue. If you receive a notification message and you realize that the change is in error, for example you made a typo in the new email address, you can let the validation link expire. You can then enter a change to the correct email address.

Change Password Link

You can change your password using the **Change Password** link in the **Settings** portlet when you are logged in to NetSuite. You must first enter the password you used to log in to your account, and then enter a new password. You must provide your password to ensure the security of your account.

> ⚠ **Important:** If you do not find the **Change Password** link in your **Settings** portlet check the role you are currently logged in with. It is possible that the role does not have the permission needed to change the password. Try switching to another role, or contact your Administrator.

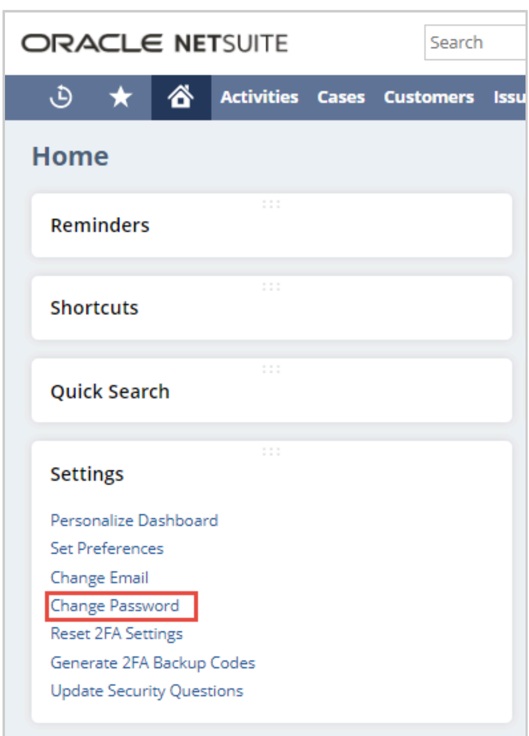
How to Change Your Password

You can also reset your password if you are unable to log in because you forgot your password. For more information, see Getting Access When You Forget Your Password.

To change your password:

1. Find the **Settings** portlet on the Home page. If you cannot locate the **Settings** portlet, see Finding Your Settings Portlet.

> ✔ **Tip:** The **Settings** portlet can appear anywhere on a customized Home page (or dashboard). By default, it is located on the left side, and you might need to scroll down to see it.

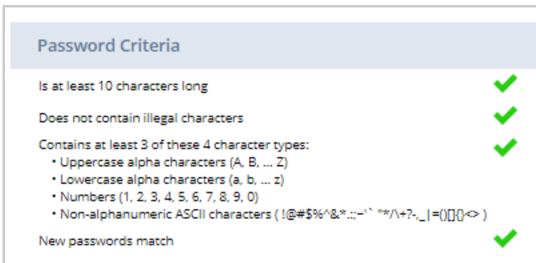


2. Click **Change Password**.
3. In the **Current Password** field, enter the password you currently use to log in to NetSuite.

   If you provide five consecutive wrong passwords, you are locked out of NetSuite for a period of 30 minutes.

   > **Note:** If you cannot remember your current password, see Getting Access When You Forget Your Password.

4. In the **New Password** field, enter a new password.
5. As you type, the **Password Criteria** fields provide feedback, ensuring that the password you enter meets the criteria shown. For more information, see Creating a Strong Password.



6. Re-enter the new password in the **Confirm New Password** field.
7. Click **Save**.

   The next time you log in to NetSuite, you must use the new password.

   > **Note:** You will receive an email notification when the password associated with your email address is changed. This email notification enables you to be more aware and proactive in cases where there is a fraudulent attempt to change your password.

Creating a Strong Password

It is important to choose a password that cannot be compromised. Your password is validated to ensure it meets minimum requirements. The validation is based on a combination of password settings that can be modified by your account administrator and system requirements that cannot be modified.

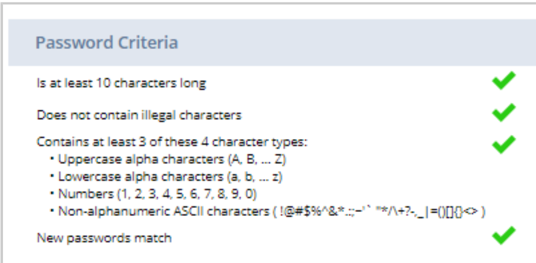
> **Note:** For information about how to change your password, see Change Password Link.

By default, all NetSuite accounts are set to have a Strong password policy. This policy enforces the following requirements:

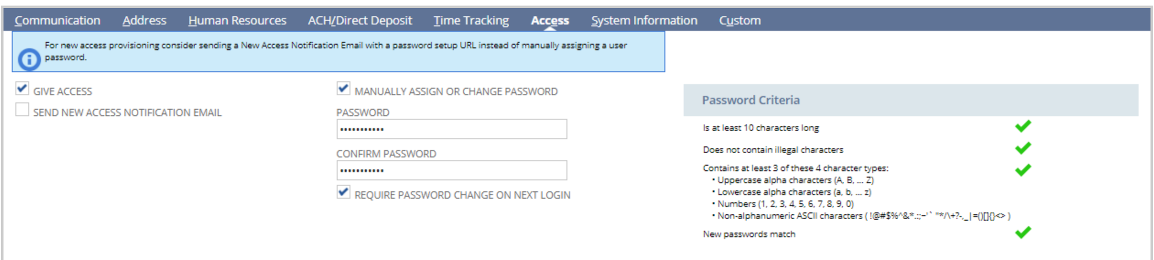
- Minimum length of 10 characters
- At least 3 of the following 4 character types—uppercase letters, lowercase letters, numbers, non-alphanumeric ASCII characters
- No non-ASCII characters, which are considered illegal
- Not something that someone could easily guess, such as common names, words, and strings like abcd123456
- Significantly different from your most recent password

The length and character type requirements for your password may vary if your account administrator has changed the password policy or minimum password length. Ask your administrator if you have questions about the password requirements for your company.

The **Password Criteria** fields provide immediate feedback as you type a password on the Change Password page. This feedback shows you whether your entered password complies with all of the password requirements for your company.

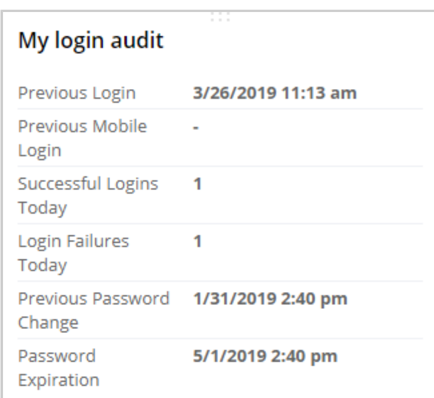


The **Password Criteria** fields appear on any entity record where it is possible for you or an administrator to enter a password for granting access to your NetSuite account.



Password Expiration Notifications

Your NetSuite password will expire. The length of time that a password remains valid depends on the password requirements configured by your account administrator. You can view the date and time your password will expire in the **My Login Audit** portlet on your Home page.



Tip: After changing your password, refresh the portlet to see the new password expiry date.

You will receive advance notice of the date that your password will expire. This notice helps to eliminate uncertainty and problems associated with having to change your password at an inconvenient time. The first notice is sent 14 days before your password expiration date. As soon as you update your password, the notices stop. If you do not change your password, the next notice arrives seven days before your password expires. If necessary, you will receive an additional notice each day for the final three days before your password expires.

The password expiration notification includes a link to let you change your password. A table lists the Company ID, Company Name, Days to expiration, and account type helps you to identify the role and the account where your password is expiring.

You can also use the **Change Password** link in the **Settings** portlet to change your password. For more information, see:

- Change Password Link
- Finding Your Settings Portlet

Be aware of the following:

- Users can have roles that provide access to more than one NetSuite account. It is possible that some of the accounts to which a user has access have a stricter password requirements than other accounts. On rare occasions, users may attempt to access a role in an account that has stricter password requirements and encounter a password expired error message. For example, users assigned to the NetSuite Support Center or the NetSuite Support Center (Basic) role are accessing the Oracle NetSuite account through the **NetSuite Account Center** portlet. These users are then subject to the Oracle NetSuite password requirements. In this case, users must change their password before they can access the NetSuite Account Center.
- You might be required to comply with Payment Card Industry Data Security Standard (PCI DSS) password requirements. If you have a role with the View Unencrypted Credit Cards permission, you must change your NetSuite password at least every ninety (90) days. If your company policy for NetSuite password expiration is greater than 90 days, the 90 days limit is automatically enforced for anyone with the View Unencrypted Credit Cards permission. In addition, the required length for a password is a minimum of seven (7) characters. Everyone with access to unencrypted credit card numbers must comply with PCI password requirements.
- Roles to which the SAML Single Sign-on permission has been added, and roles that have been designated as Single Sign-on Only, are exempt from password expiration notifications. SAML user credentials are not managed by NetSuite, but by the Identity Provider (IdP).

> **Note:** Users with multiple roles will receive the password expiration notification if one or more roles are not designated as Single Sign-on Only. This also applies to roles deactivated on the Role page.

Setting Up Security Questions

The first time you log in to NetSuite, you are prompted to answer three security questions. These answers are used to verify your identity if you forget your password, or if you log in from a new browser or a new computer. This process helps to maintain application security by preventing unauthorized use of your NetSuite user credentials.

If you are under time pressure, you can click **Remind Me Later** to dismiss this prompt and log in to NetSuite immediately. However, the next time you log in to NetSuite, you will be prompted again to set up these questions.

> **Note:** You can dismiss this prompt a maximum of five times. After that, you will be required to set up security questions to proceed with your login to NetSuite.

See the following sections for more information:

- Set Up Security Questions Link
- Security Questions Details

Set Up Security Questions Link

If you dismiss the prompt, then decide you would like to set up your security questions, click the **Update Security Questions** link in the **Settings** portlet.

> **Tip:** The **Settings** portlet can appear anywhere on a customized Home page (or dashboard). By default, it is located on the left side, and you might need to scroll down to see it.

If you cannot locate the **Settings** portlet, see Finding Your Settings Portlet. See also Update Security Questions Link for more information.

> **Important:** Remember your questions and answers! NetSuite does not often prompt you to answer a security question, you forget you set them up. However, there are several situations when you will be prompted, and it is important that you know the answers. See When Security Questions are Asked for more information.

When you save your security questions and answers, a confirmation is displayed. Also, an email is sent to the email address you used to log in, as notification that this setup has occurred.

You have the option of changing your security questions and answers later. See Update Security Questions Link.

Security questions and answers are shared across all NetSuite accounts associated with the same production account.

Security Questions Details

See the following sections for details about security questions:

- Requirements for Answers to Security Questions
- Exemptions from Setting Up Security Questions
- When Security Questions are Asked

Requirements for Answers to Security Questions

If any of these requirements is not met, you will receive an error when you attempt to save security answers.

- You must answer all three questions.
- Each answer must be unique.
- Each answer must be at least three characters long.
- You cannot use your email address or password as an answer.

> **Note:** Answers are not case-sensitive.

Exemptions from Setting Up Security Questions

If you log in to NetSuite with certain roles, or with certain types of access, you are exempted from the requirement to set up security questions. The following roles are exempted:

- Customer Center
- Web Store Shopper

> **Note:** Users with two-factor authentication (2FA) roles, or roles with IP address restrictions enabled are prompted to set up security questions. However, users with 2FA or IP address restricted roles are only asked to answer security questions if they forget their passwords.

The following types of access are exempted:

- Web Services
- SuiteScript
- SuiteAnalytics Connect
- OpenID Connect (OIDC) Single Sign-on
- SAML Single Sign-on

When Security Questions are Asked

You will be prompted to answer a security question before you can log in to NetSuite in the following circumstances:

- When you attempt to log in:
  - using a new browser
  - after the browser cache has been cleared
  - with the browser set to private mode (also called incognito browsing)
  - from a new or different computer

  > **Note:** This additional authentication requirement does not apply to you if you are using two-factor authentication roles, or roles with IP address or device ID restrictions enabled.
- When you forget your NetSuite password, and must reset it.
- If it has been more than 90 days since your last login.

If you answer the security question correctly, your login to NetSuite proceeds and an email is sent to the email address you used to log in, as notification of the successful authentication.

If you provide five consecutive wrong answers to the security question, you are locked out of NetSuite for a period of 30 minutes, and an email is sent to your email address and to your account administrator, as notification of the authentication failure.

Update Security Questions Link

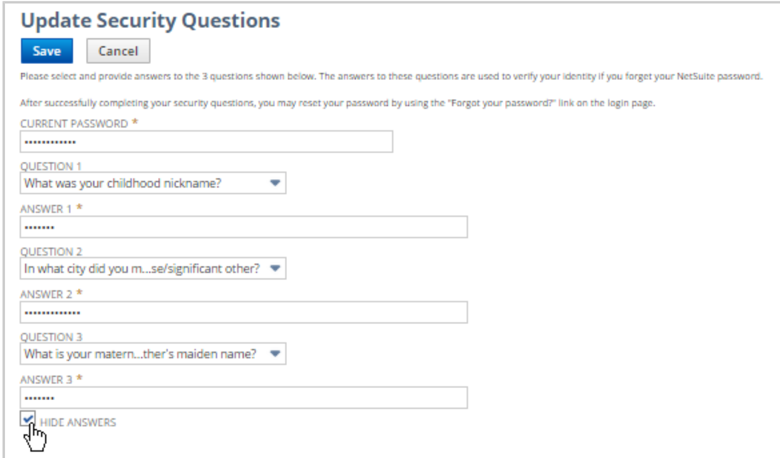
The first time you log in to NetSuite, you are prompted to set up three security questions that are used to verify your identity, as described in Setting Up Security Questions. You have the option of changing these questions and answers.

You are the only one who can update your security questions. If you cannot answer your security questions, see If You Forget the Answers to Your Security Questions.

To change security questions and answers:

1. Find the **Settings** portlet on the Home page. If you cannot locate the **Settings** portlet, see Finding Your Settings Portlet.

   > **Tip:** The **Settings** portlet can appear anywhere on a customized Home page (or dashboard). By default, it is located on the left side, and you might need to scroll down to see it.
2. Click **Update Security Questions**.



3. Enter your current NetSuite password.
4. In the **Question 1**, **Question 2** and **Question 3** fields, select questions for which you can remember the answers.
5. In the **Answer 1**, **Answer 2**, and **Answer 3** fields, enter the answers to each question you selected. You must answer all three questions.
   - Each answer must be unique.
   - Each answer must be at least three characters long.
   - You cannot use your email address or password as an answer.
   - Answers are not case-sensitive.
   - Answers are masked (hidden) by default. Clear the **Hide Answers** box to see the characters without the mask.
6. Click **Save**.

If You Forget the Answers to Your Security Questions

Since you are not often prompted to respond to the security questions you set up, you may occasionally forget your questions, or the answers you provided. The easiest way to handle this is when you are logged in to NetSuite. Click the **Update Security Questions** link in the **Settings** portlet. Select new questions, or provide answers to your existing questions. See Update Security Questions Link for details.

If you are attempting to log in to NetSuite and are prompted to answer a security question but cannot remember the answer you gave, you might be required to reset your password or ask your account administrator to do so.

If an account administrator resets your password, your previously saved security questions are erased and you must set up these questions and answers again. If you reset your own password, the existing security questions and answers are maintained.

Remember your answers! You will not often be prompted to answer a security question, so you may forget that you set them up. If you do forget your answers, the following suggestions should help.

To deal with forgotten security questions:

1. You have five attempts when answering security questions during login. You have 20 attempts when answering security questions during password reset. Try the most likely answers you would have given.

2. If the first attempt does not succeed, try again. Keep trying the most logical answers to your security questions.

   Tip: Case does not matter, so do not waste an attempt by changing some characters to a different case.

3. If you cannot reset your own password, and cannot remember your answers to security questions:
   a. Update your security questions when you are already logged in to NetSuite.
   b. Ask your account administrator to reset your password. If your account administrator resets your password, your existing security questions and answers are erased. After your password is reset, you must set up new security questions and answers. If you or your account administrator cannot reset your password, your account administrator can contact Support for assistance.
   c. Ask your account administrator to designate your role as a two-factor authentication (2FA) required role. Roles that are designated as requiring 2FA are never asked security questions. For more information, see Logging In Using Two-Factor Authentication (2FA).

Getting Access When You Forget Your Password

If you a need to change your password, use the **Change Password** link in the **Settings** portlet. For more information, see Change Password Link. See also Finding Your Settings Portlet.

However, if you cannot remember your password, you can try to reset your password yourself. Go to the NetSuite login page and click the **Forgot Your Password?** link. See the following procedure, The Forgot Your Password Reset, for complete instructions.

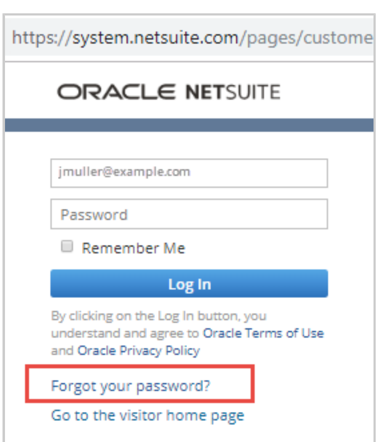
The Forgot Your Password Reset

Use the following procedure when you cannot remember your password. Part of the password reset process includes answering security questions to verify your identity.

Important: If you did not set up security questions or do not remember the answers to them, you may need assistance to access your account. If this is the case, contact your NetSuite account administrator to reset your password. When your Administrator resets your password, you must set up new security questions and answers.

To reset your password:

1. On the NetSuite login page, enter the email address you use to log in to NetSuite.



2. Click **Forgot Your Password**.
3. On the Reset Password page, enter the email address you use to log in to NetSuite, and click **Continue**.

   Follow the instructions displayed on the screen.
4. Check your email client for an email message with directions and a link for resetting your password.

   > **Note:** The link will expire in 60 minutes.

   a. If you do not receive an email message, verify whether the email address you entered in the previous step is correct. (The email address you entered is displayed in the instructions on the screen.)
   b. If the email address you entered is correct, and you still have not received an email message, please contact your NetSuite account administrator.
5. Click the link in the email message.

   > **Note:** If you receive an error message that the link has expired, begin the password reset process again at step 1.
6. Answer the security questions to confirm your identity. Answers are not case sensitive.

   > **Important:** You have 20 attempts to answer all three of your security questions correctly. If you want the answers you enter to be visible on the screen, clear the check from the **Hide Answers** box. If you fail all 20 attempts, contact your account administrator for help.
7. Click **Submit**.
8. You are redirected to the Change Password page. Complete the required fields.

   See Change Password Link for more information. See also Creating a Strong Password.

   After you have successfully reset your password, a confirmation message is sent to the email address from which the reset request was generated.

   > **Note:** If you have an Administrator role in this account, and are requesting a password reset, the confirmation email message is also sent to everyone with an Administrator role in that account. If you have an Administrator role in more than one account, and are requesting a password reset, the confirmation email message is sent to everyone who has an Administrator role in any of those accounts.

   If you still need assistance to access your account, contact your NetSuite account administrator to reset your password. When your password is reset, you must set up new security questions and answers.

My Login Audit Portlet

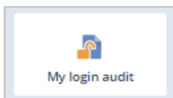
The **My Login Audit** portlet shows information about your login activity. You can add the **My Login Audit** portlet to your dashboard. Use the portlet to monitor your previous successful login, your previous failed login, the IP address associated with your login activity, the date when your password will expire, and other login information.

- The **My Login Audit** Portlet cannot be added to the Customer Center or the Employee Center dashboards.

- The value shown for **Successful Logins** increments each time you switch roles. By switching to another role, you are (in a sense) logging in to a different role.
- The dates and times displayed in the portlet are based on the time zone you selected as your preference on the General subtab at Home > Set Preferences.
- If you are logged in and changed your password, refresh the portlet to display your new Password Expiration date.

To add the My Login Audit portlet to your dashboard:

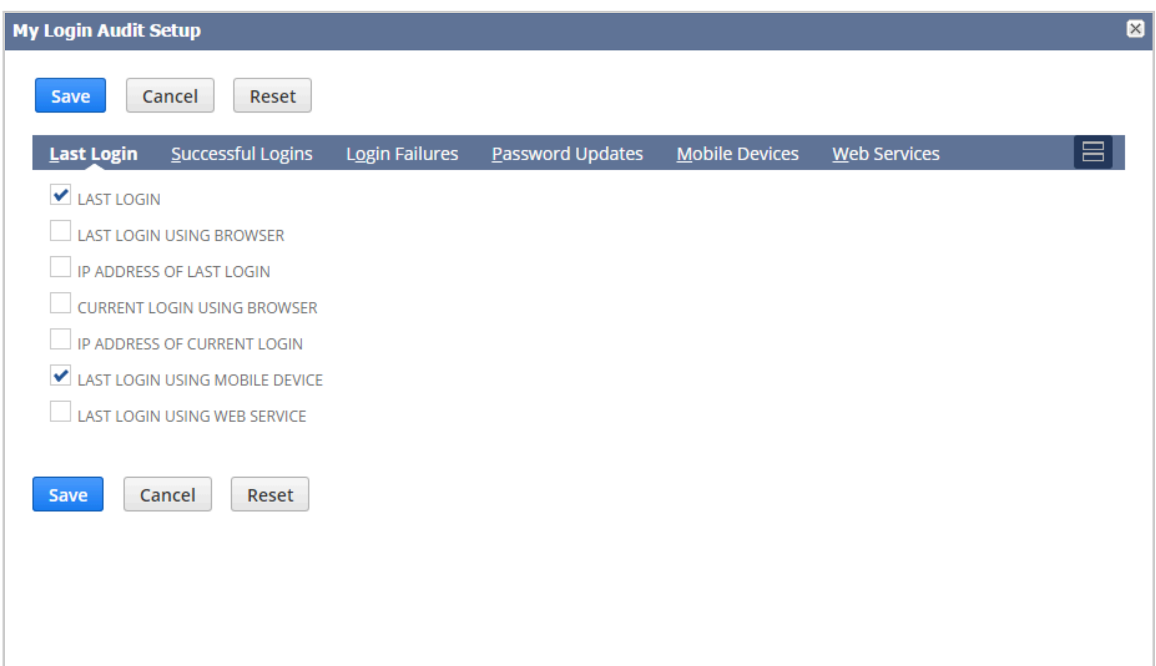
1. Click **Personalize** in the upper right corner of your dashboard or use **Personalize Dashboard** in the **Settings** portlet.
2. In the **Standard Content** tab of the **Personalize Dashboard** palette, click or drag and drop the **My Login Audit** icon.



3. To configure the login information displayed in the **My Login Audit portlet**, click **Set Up** in the portlet menu.

Choosing the Information Shown in the My Login Audit Portlet

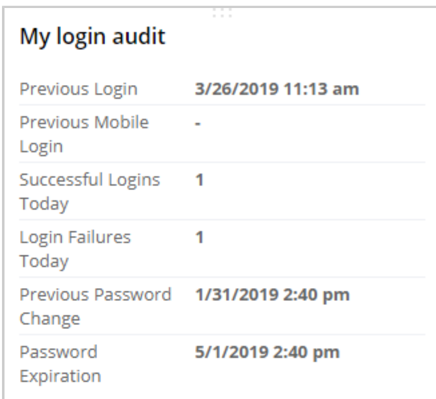
Click the **Set Up** menu option in the **My Login Audit** portlet to open a window. Multiple tabs let you select the type of information you want to see in the portlet.



- **Last Login** tab - options include:
  - Last Login

    - Last Login Using Browser
    - IP Address of Last Login
    - Current Login Using Browser
    - IP Address of Current Login
    - Last Login Using Mobile Device
    - Last Login Using Web Service
- **Successful Logins** tab - options for successful logins include: Today, This Week, This Month.
- **Login Failures** tab - options: Last Login Failure, IP Address of Last Login Failure, and options for failed logins include: Today, This Week, This Month.

> **Note:** Entering an incorrect 2FA verification code is counted in the portlet as a Login Failure.



- **Password Updates** tab – options: Last Password Change and Password Expiration.
- **Mobile Devices** tab – options for successful logins using mobile devices include: Today, This Week, This Month.
- **Web Services** tab – options for successful logins using SOAP web services include: Today, This Week, This Month.

For more information about the options listed on each tab, refer to the field-level help.

Logging In Using Two-Factor Authentication (2FA)

Important: As of **March 1, 2023**, users setting up or resetting their 2FA configurations must install and use an authenticator app to generate verification codes. Receiving codes by SMS will no longer be supported for users setting up 2FA for the first time, or for existing users who reset their 2FA settings. Users can also log in with the one-time backup codes provided during 2FA setup.

The SMS option is currently only prohibited for new 2FA setups. However, industry experts (such as NIST, W3C, and the FIDO Alliance) no longer view SMS as a secure delivery mechanism for 2FA verification codes. As part of our ongoing commitment to world-class security, the SMS option is targeted for removal in a future NetSuite release.

For more information, see:

- Logging In Using Two-Factor Authentication (2FA)
- Supported Authenticator Apps
- Reset Your 2FA Settings
- Backup Codes for Two-Factor Authentication (2FA)

2FA Setup for Users

Requiring a second factor for authentication is a method of improving security. Your administrator can assign you a role that requires 2FA authentication. You will receive an email the first time you attempt to log in to your 2FA role. The email contains instructions and a verification code for your initial login to that role. The next time you log into a 2FA require role, you will be prompted to set up your 2A preferences in NetSuite. You should use an authenticator app to generate the verification codes necessary during login. While your session remains valid, you will not be asked again for a verification code when you switch between roles, even when you switch between roles in different companies.

If you are assigned a role that requires 2FA authentication, you must set up an authenticator application or a phone number in NetSuite.

Note: You must complete the initial 2FA setup in the NetSuite UI on your computer. You can log in using 2FA with the NetSuite Mobile application. However, it is not possible to perform the initial 2FA setup from the mobile app.

For more information about setting up 2FA in NetSuite, see:

- Set up Your Preferences for Two-Factor Authentication (2FA)
  - Complete Your 2FA Setup
  - Supported Authenticator Apps
  - Troubleshoot Authenticator Apps

> **Important:** If you lose your phone, buy a new phone, change your phone number, change your authenticator app, or change your verification code delivery method, you must reset (clear) your 2FA settings in NetSuite. See Reset Your 2FA Settings. After resetting, you will start the 2FA setup process again.

To log in with a role that requires 2FA, you must first enter your email address and password on the NetSuite login page, and click Log In. After that step is successful, you are prompted for a verification code. For more information about using 2FA in NetSuite, see:

- Using 2FA
  - The Logging in Page for 2FA
  - Managing Your Trusted Devices
  - Reset Your 2FA Settings
  - Backup Codes for Two-Factor Authentication (2FA)

Set up Your Preferences for Two-Factor Authentication (2FA)

Authenticator apps for generating 2FA verification codes are supported in all NetSuite accounts. Consider switching to an authenticator app, if you are using SMS or Voice call methods. Authenticator apps can generate a verification code even when you cannot receive an SMS or voice call. For more information about selecting an authenticator app, see Supported Authenticator Apps.

> **Important:** As of **March 1, 2023**, users setting up or resetting their 2FA configurations must install and use an authenticator app to generate verification codes. Receiving codes by SMS will no longer be supported for users setting up 2FA for the first time, or for existing users who reset their 2FA settings. Users can also log in with the one-time backup codes provided during 2FA setup.
>
> The SMS option is currently only prohibited for new 2FA setups. However, industry experts (such as NIST, W3C, and the FIDO Alliance) no longer view SMS as a secure delivery mechanism for 2FA verification codes. As part of our ongoing commitment to world-class security, the SMS option is targeted for removal in a future NetSuite release.
>
> For more information, see:
>
> - Logging In Using Two-Factor Authentication (2FA)
> - Supported Authenticator Apps
> - Reset Your 2FA Settings
> - Backup Codes for Two-Factor Authentication (2FA)

You are allowed to dismiss the prompt to set up 2FA five times before you are required to select an authentication method and set up your authenticator app. Ten backup codes are generated when you complete the security setup page.

- When using an authenticator app for 2FA, you must enter the verification code obtained from the app to complete the setup.

- When using your phone for 2FA, the phone number is associated with the email address you used for login. Your phone number is not stored on your employee, partner, or vendor record. Your phone number is verified by sending a verification code, either by SMS or by voice call. Enter this code in NetSuite to complete the setup.

> **Important:** If you want to change your 2FA preferences, you must reset your 2FA settings. For more information, see Reset Your 2FA Settings

For more information, see the following topics:

- Complete Your 2FA Setup
- Supported Authenticator Apps
- Troubleshoot Authenticator Apps

> **Important:** After you set up your 2FA preferences, you may want to change them. For example, you may want to change your authenticator app. Or you might have lost your phone, bought a new one, or changed your phone number. To change your preferences, you must first reset (or clear) your 2FA settings in NetSuite. See Reset Your 2FA Settings. After the reset is completed, you must start the 2FA setup process from the beginning.

Complete Your 2FA Setup

The first time you log in to NetSuite with a 2FA required role, you are automatically shown the Security setup page. If you do not see the Security setup page, you might not be logged in to NetSuite with a role that requires 2FA. Switch roles to a role that is 2FA required. If you do not know whether you have a role that requires 2FA, ask your account administrator.

> **Note:** You must complete the initial 2FA setup in the NetSuite UI on your computer. You can log in using 2FA with the NetSuite Mobile application. However, it is not possible to perform the initial 2FA setup from the mobile app.

To complete your 2FA setup:

1. Install an authenticator app on your phone if you have not done so. See Supported Authenticator Apps. Authenticator apps for generating 2FA verification codes are supported in all NetSuite accounts.

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

   > **Important:** As of **March 1, 2023**, users setting up or resetting their 2FA configurations must install and use an authenticator app to generate verification codes. Receiving codes by SMS is no longer supported for users setting up 2FA for the first time, or for existing users who reset their 2FA settings. Users can also log in with the one-time backup codes provided during 2FA setup.
   >
   > The SMS option is currently only prohibited for new 2FA setups. However, industry experts (such as NIST, W3C, and the FIDO Alliance) no longer view SMS as a secure delivery mechanism for 2FA verification codes. As part of our ongoing commitment to world-class security, the SMS option is targeted for removal in a future NetSuite release.

   > **Note:** You can click **Skip to NetSuite** to dismiss this prompt up to five times. After the fifth time, you are required to set up an authenticator app or your phone number.

2. Using the authenticator app on your phone:

a. Scan the QR code displayed, or manually enter the string of characters shown next to the QR code.

   The authenticator app generates a verification code.

b. Enter the verification code.

   Verification codes generated by authenticator apps expire approximately every 30 seconds. Enter a new code if the initial code you receive expires.

   > **Important:** If you have entered several codes in a row that have been refused, do not keep trying codes from your app. After five failed attempts, you will lock yourself out of NetSuite. If the time on your phone or app is not properly synchronized, NetSuite will not accept the verification codes generated by your app. See Troubleshoot Authenticator Apps for potential solutions.

c. Click **Next**.

3. Ten backup codes are displayed in the UI.

   These unique backup codes can be used to log in to a 2FA role when you are unable to receive a verification code. Each backup code can be used only a single time.

   > **Important:** Treat backup codes as securely as you would treat a password. This is the only time these unique ten codes are displayed in the UI. You cannot retrieve these from the system after you close this window. If you lose these backup codes, you can generate new ones.

4. Click **Print** to print the backup codes, if desired.

   > **Important:** Planning a trip to a location where you do not have phone service? Authenticator apps provide a verification code even when you have no cell service. What if you do not want to turn on your phone at all? You should also take your back up codes with you. Keep your backup codes secure. Do not store your backup codes with the device you use to log in to NetSuite.

5. Click **Next**.

After your 2FA setup is complete, the **Reset 2FA Settings** and **Generate Backup Code** links appear in your **Settings** portlet. If you cannot locate the **Settings** portlet, see Finding Your Settings Portlet. If you do not see the links as expected, refresh your browser.

For more information, see the following topics:

- Supported Authenticator Apps
- Troubleshoot Authenticator Apps

Supported Authenticator Apps

You should use an authenticator application for roles that require 2FA. You can select an authenticator app from the vendor of your choice, as long it complies with the OATH TOTP standard. The following mobile phone apps are suggested:

- Oracle Mobile Authenticator
- Google Authenticator
- Microsoft Authenticator
- OKTA Verify

Download the appropriate authenticator app for your device to get started.

> **Note:** The authentication application you choose must support the OATH TOTP, the IETF RFC 6238 standard. OATH is the Initiative For Open Authentication. TOTP means time-based one-time password. IETF is the Internet Engineering Task Force.

For more information, see the following topics:

- Complete Your 2FA Setup
- Troubleshoot Authenticator Apps

If you lost your device, buy a new one, change your phone number, change your authenticator app, or change your verification code delivery method, you must reset (clear) your 2FA settings in NetSuite. See Reset Your 2FA Settings. See also If You Lost or Replaced the Phone You Use for 2FA

> **Important:** Do not install the authenticator app on the same device that you use for logging in to NetSuite.

Troubleshoot Authenticator Apps

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

> **Important:** If you have entered several codes in a row that have been refused, do not keep trying codes from your app. After five failed attempts, you will lock yourself out of NetSuite.

If you need access to NetSuite right away, change the method by which you will receive the next code. For example, click **SMS message**, **Voice call**, or **Backup codes**. This is only possible if you set up your 2FA before March 1, 2023. If your 2FA setup does not allow sending codes by SMS or Voice call, you are unable to use these methods.

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

To synchronize time on your phone:

1. Go to Settings on your phone. Locate the settings for date and time.

   The navigation path to the date and time settings, and the exact name of the settings varies depending on the type of phone you have (Apple or Android) and the version of the operating system (OS) software on your phone.
2. If you have an iPhone, go to Settings > General > Date & Time. Verify that the switch for the setting **Set Automatically** is on.
3. If you have an Android, go to Settings > System > Date & Time. Verify that the switch for the settings **Automatic date & time** and **Automatic time zone** is on.
4. Older software versions on some phones might have a **sync time to server** setting. Clear the box if the sync time to server setting is checked. Verify that the time on your phone is synchronized to **network** time.

To synchronize time on your Google Authenticator app:

The Google Authenticator app has an internal time sync setting, **Time correction for codes**. If the time is not correctly synchronized, the verification codes will not work. A Google Support site, Common issues with 2–Step Verification, details the steps for correcting the time in the app. Scroll down to the bottom of the page to the **My Google Authenticator codes aren't working (Android)** entry.

If synchronizing time does not help you, try resetting your 2FA.

For more information, see the following topics:

- Complete Your 2FA Setup
- Supported Authenticator Apps

Using 2FA

Authenticator apps for generating 2FA verification codes are supported in all NetSuite accounts.

> **Important:** As of **March 1, 2023**, users setting up or resetting their 2FA configurations must install and use an authenticator app to generate verification codes. Receiving codes by SMS will no longer be supported for users setting up 2FA for the first time, or for existing users who reset their 2FA settings. Users can also log in with the one-time backup codes provided during 2FA setup.
>
> The SMS option is currently only prohibited for new 2FA setups. However, industry experts (such as NIST, W3C, and the FIDO Alliance) no longer view SMS as a secure delivery mechanism for 2FA verification codes. As part of our ongoing commitment to world-class security, the SMS option is targeted for removal in a future NetSuite release.

After completing the initial 2FA setup, see the following topics about using 2FA in NetSuite:

- The Logging in Page for 2FA
- Managing Your Trusted Devices
- Backup Codes for Two-Factor Authentication (2FA)
- Reset Your 2FA Settings
- If You Lost or Replaced the Phone You Use for 2FA
- Set up Your Preferences for Two-Factor Authentication (2FA)

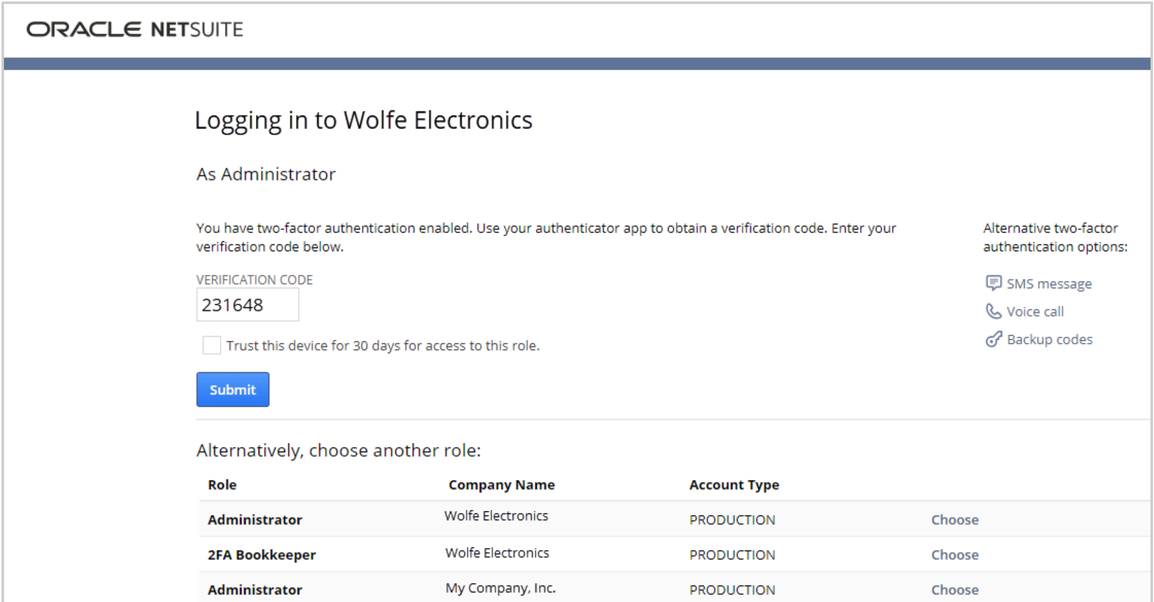
> **Important:** After you set up your 2FA preferences, you may want to change them. For example, you may want to change your authenticator app. Or you might have lost your phone, bought a new one, or changed your phone number. To change your preferences, you must first reset (or clear) your 2FA settings in NetSuite. See Reset Your 2FA Settings. After the reset is completed, you must start the 2FA setup process from the beginning.

2FA Access to Sandbox Accounts

When your sandbox is refreshed, roles that require 2FA authentication are copied from your production account to your sandbox. Your 2FA setup is also copied to your sandbox account. No additional 2FA setup is necessary.

The Logging in Page for 2FA

If your administrator designated one or more of your roles as **2FA authentication required**, you can use an authenticator app to obtain a verification code, or use your phone to request a code by SMS message or voice call, or use one of your backup codes. For more information, see Logging In Using Two-Factor Authentication (2FA).



- You can decide whether you want to check the **Trust this device** box. For more information about this box, see Managing Your Trusted Devices.
- You can click one of the links to select an alternative method for receiving a code for this log in attempt. For example, click **SMS message**, **Voice call**, or **Backup codes**.
- Your other roles are listed on the page. You can select an alternative role by clicking **Choose** to the right of the role.

> **Important:** After you set up your 2FA preferences, you may want to change them. For example, you may want to change your authenticator app. Or you might have lost your phone, bought a new one, or changed your phone number. To change your preferences, you must first reset (or clear) your 2FA settings in NetSuite. See Reset Your 2FA Settings. After the reset is completed, you must start the 2FA setup process from the beginning.

Managing Your Trusted Devices

When you are providing a verification code for logging in to NetSuite, take notice of the **Trust this device...** text on the **Logging in to...** page. The text specifies the length of time that a device can be trusted. The length of time is configured by your administrator for your 2FA role. If you will use this device often to log in, you should check the box to the left of the text. Checking this box means you will not have to provide another verification code for the period of time that your administrator specified for this role. This trusted device time period can range from hours to days.

You can always remove the trust from this device, or from all of your devices, if needed. For example, if you lose or replace a device, you should remove the trusted status from that device. You can also restore the 2FA challenge for devices at any time. You have complete control over the management of your devices.

Marking a Device as Trusted When Logging in

See the following procedure for detailed instructions on how to make a device trusted during a login.

To mark a device as trusted when logging in:

1. Log in with a role that requires 2FA. Enter your email address and password on the NetSuite login page, and click **Log In**.

   After that step is successful, you are prompted for a verification code.
2. On the Logging in to ... page, enter the verification code.
3. Check the **Trust this device for ...** box, if desired.
4. Click **Submit**.

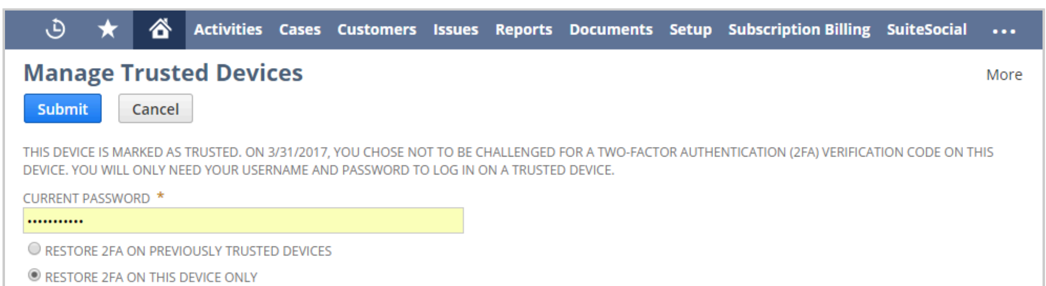
> **Note:** You might have access to NetSuite accounts for more than one company. Marking a device as trusted for a 2FA authentication required role makes that device trusted across all of the companies to which you have access.

Managing Devices Marked as Trusted

See the following procedure for detailed instructions on how to manage devices marked as trusted.

To manage trust for your devices:

1. Find the **Settings** portlet on your Home page. If you cannot locate the **Settings** portlet, see Finding Your Settings Portlet.
2. Click **Manage Trusted Devices.**

   In this example, you had previously marked a device as trusted upon login. Now you have changed your mind.
3. To reverse your earlier choice, select one of the **Restore 2FA ...** options.

   Remember that when the 2FA challenge is restored for a device, the next time you log in, you must have your authenticator app, your phone, or one of your backup codes available.

Backup Codes for Two-Factor Authentication (2FA)

Backup codes are provided when you successfully complete setup of your 2FA preferences in NetSuite.

> **Important:** Planning a trip to a location where you do not have phone service? Authenticator apps can provide a verification code even when you have no cell service. What if you do not want to turn on your phone at all? You should also take your back up codes with you. Keep your backup codes secure. Do not store them with the device you use to log in to NetSuite.

These codes are associated with your email address and are unique. You are the only person who can use these codes. A backup code is used for verification on login. Each code can be used only one time. You can generate new backup codes as needed. Backup codes do not expire, however, if you generate a new set of backup codes, the previous set of your codes is no longer valid.

You can generate ten new backup codes if you use all your existing backup codes, or if you lose them, or if you feel your existing codes may have been compromised. Generating new backup codes invalidates your previous codes.

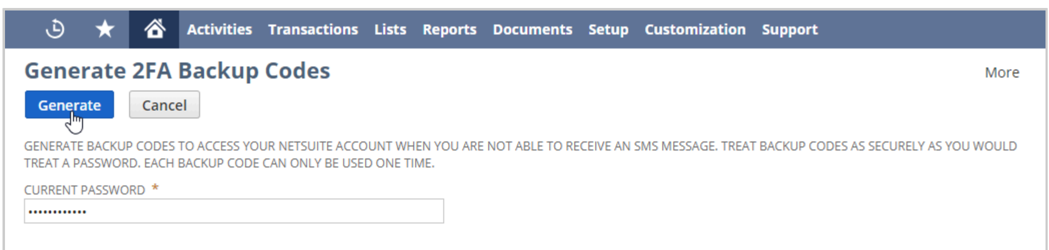
To generate backup codes:

1. Find the **Settings** portlet on your Home page.

   If you cannot locate the **Settings** portlet, see Finding Your Settings Portlet.
2. Click the **Generate Backup Codes** link.
3. Enter your password. You might also need to enter a verification code or backup code.
4. Click **Generate**.

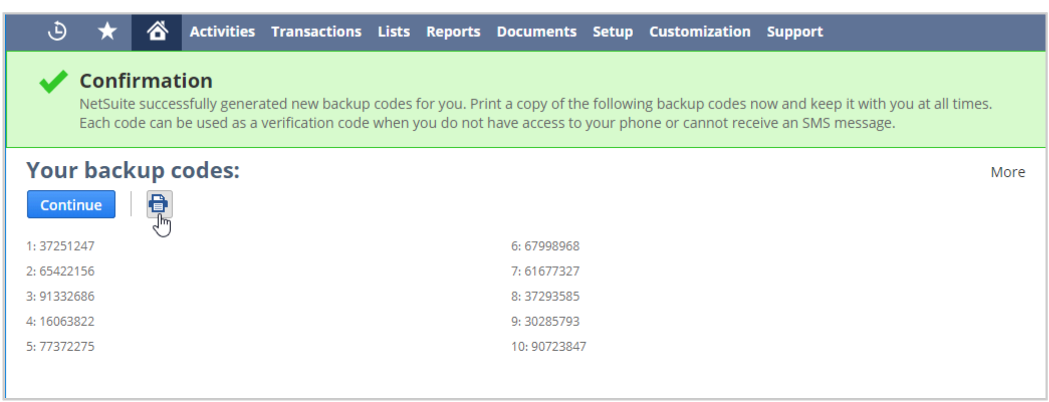
   Ten backup codes are displayed.

   > **Important:** This is the only time these unique ten codes are displayed in the UI. You cannot retrieve these codes from the system after you leave this window. If you lose these backup codes, generate new ones. Use the link in the **Settings** portlet. You may need a backup code if, for example, you must set up a different phone. For more information, see Reset Your 2FA Settings.



5. Click the printer icon to print the backup codes, if desired.

   > **Important:** Treat backup codes as securely as you would treat a password. Do not store your codes with the device you use to log in to NetSuite.



6. Click **Continue** to return to the NetSuite UI.

Each time you use one of your backup codes, you receive an email notification that one of your codes was used.

> **Important:** If you lose your phone, buy a new phone, change your phone number, change your authenticator app, or change your verification code delivery method, you must reset (clear) your 2FA settings in NetSuite. See Reset Your 2FA Settings. After the reset is completed, you must start the 2FA setup process from the beginning.

Reset Your 2FA Settings

You need to reset (clear) your 2FA settings in NetSuite if you:

- Change your authenticator app.
- Lose your phone.
- Buy a new phone.
- Change your phone number.
- Change your verification code delivery method.

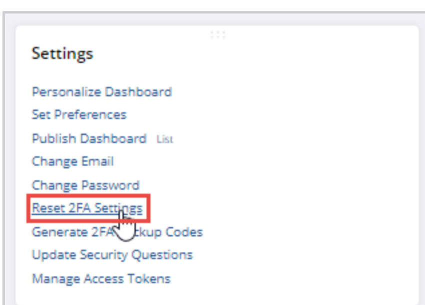
When you reset your 2FA settings, you remove your existing 2FA setup information from NetSuite.

> **Important:** The Reset 2FA Settings link only clears your existing 2FA settings from NetSuite. You will not be able to set up your 2FA preferences again until the next time you attempt to access NetSuite with a 2FA-required role. In this case, you receive a verification code by email. Enter the code and click **Submit**. You are prompted to set up your 2FA preferences in NetSuite. See Set up Your Preferences for Two-Factor Authentication (2FA).

You can reset your 2FA settings from the **Settings** portlet on your Home page (Dashboard) by using the **Reset 2FA Settings** link.

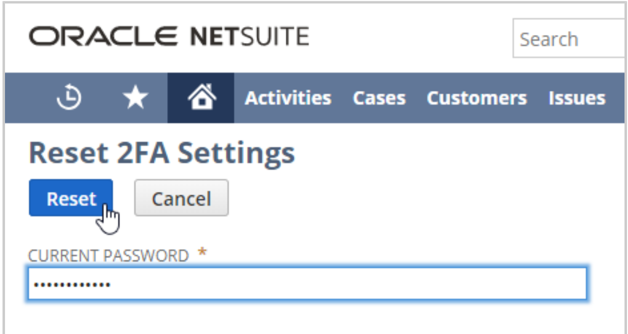
To reset your 2FA settings:

1. Find the **Settings** portlet on your Home page. If you cannot locate the **Settings** portlet, see Finding Your Settings Portlet.
2. Click **Reset 2FA Settings**.



> **Note:** If you do not see the **Reset 2FA Settings** link on your **Settings** portlet, it indicates that you have already reset (cleared) your 2FA settings from NetSuite. The next time you log in to NetSuite with a 2FA-required role, you will be prompted to set up your 2FA preferences in NetSuite. See Set up Your Preferences for Two-Factor Authentication (2FA).

3. On the Reset 2FA Settings page, enter your NetSuite password. You might also need to enter a verification code or backup code.



4. Click **Reset**.

   When you click **Reset**, you remove your existing 2FA setup information. A confirmation screen states that your registered 2FA devices were successfully reset. You also receive an email notification from NetSuite that your registered 2FA devices have been reset, and can no longer be used to access your NetSuite account.

   The next time you attempt to access NetSuite with a 2FA-required role, you receive a verification code by email. Enter the code and click **Submit**, and you are prompted to set up your 2FA preferences in NetSuite. See Set up Your Preferences for Two-Factor Authentication (2FA).

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

If You Lost or Replaced the Phone You Use for 2FA

> **Important:** As of **March 1, 2023**, users setting up or resetting their 2FA configurations must install and use an authenticator app to generate verification codes. Receiving codes by SMS will no longer be supported for users setting up 2FA for the first time, or for existing users who reset their 2FA settings. Users can also log in with the one-time backup codes provided during 2FA setup.
>
> The SMS option is currently only prohibited for new 2FA setups. However, industry experts (such as NIST, W3C, and the FIDO Alliance) no longer view SMS as a secure delivery mechanism for 2FA verification codes. As part of our ongoing commitment to world-class security, the SMS option is targeted for removal in a future NetSuite release.

If you have a 2FA-required role in NetSuite, you may be using a phone to obtain verification codes. If you lost your phone, or purchase a new phone, you must clear the settings (the setup information) of your old phone from NetSuite. After resetting your 2FA settings, you must set up your 2FA preferences in NetSuite again. Even if your phone number remains the same, you may not be able to transfer an authenticator app from one phone to another. You must set up your 2FA preferences in NetSuite again and install and configure an authentication app on your new phone.

> **Important:** If you lost your phone, you should remove the phone's 2FA settings from NetSuite as soon as possible. You may need to contact an Administrator of your NetSuite account for assistance. An Administrator can use the User Access Reset Tool to help you if you are not able to log in to NetSuite.

Before you begin, verify that you have a current backup code available. If you cannot locate your current backup codes, and you are able to log in to NetSuite, generate a new set of backup codes. See Backup Codes for Two-Factor Authentication (2FA).

To change your 2FA phone setup in NetSuite:

1. Click the **Reset 2FA Settings** link in the **Settings** portlet. See Reset Your 2FA Settings. You may be required to enter a backup code to complete the reset. A backup code is required if you are logged in from a device that is not a trusted device in NetSuite. For more information about trusted devices, see Managing Your Trusted Devices.

   > **Note:** If you cannot locate your **Settings** portlet, see Finding Your Settings Portlet.

2. Log out of NetSuite.
3. Log in to NetSuite with a 2FA-required role. You are prompted to set up your 2FA preferences before you can access NetSuite. See Set up Your Preferences for Two-Factor Authentication (2FA). A video about 2FA setup is also available: 2FA Setup for Users.
4. Follow the on-screen prompts to choose your primary and secondary methods for obtaining verification codes. See Complete Your 2FA Setup.

Employee Center Self-Service

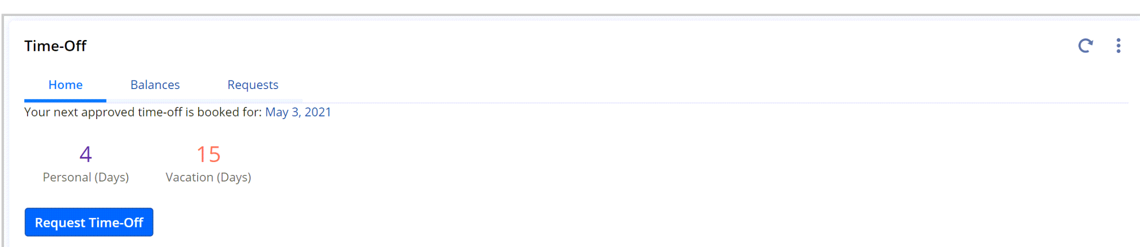
This section includes information about the self-service features that are available to both employees and managers, depending on the features that your administrator has set up in your account. Learn more about each of these features in the following topics:

- Time-Off
- Time Tracking
- Reminders
- Kudos
- Goals
- Performance Reviews
- Finding People in Your Company
- Payroll and Banking Information
- Expense Reporting
- Purchase Requests and Requisitions
- Approving Vendor Bills
- Approving Vendor Prepayments
- Tasks
- Calendar
- Contacts
- Phone Calls
- File Cabinet
- Search
- Entering Help Desk Cases
- Campaign Subscription Center

Time-Off

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, and are set up by your HR administrator.

After you submit a time-off request, an email notification is sent to the approver. When your supervisor or an assigned approver takes action on your time-off request, an email notification is sent to you.



> **Important:** If you do not see the Time-Off portlet in your Employee Center dashboard, then your company might not be using this feature. For more information, contact your administrator.

Learn more about managing time off in the following topics:

- Submitting Time-Off Requests
- Submitting Time-Off Requests on Behalf of Employees as a Manager
- Viewing Time-Off Requests
- Viewing Time-Off Balances
- Approving or Rejecting Time-Off Requests
- Canceling Time-Off Requests

Submitting Time-Off Requests

Requesting Time Off from NetSuite's Employee Center

Use the following procedure to submit a time-off request.

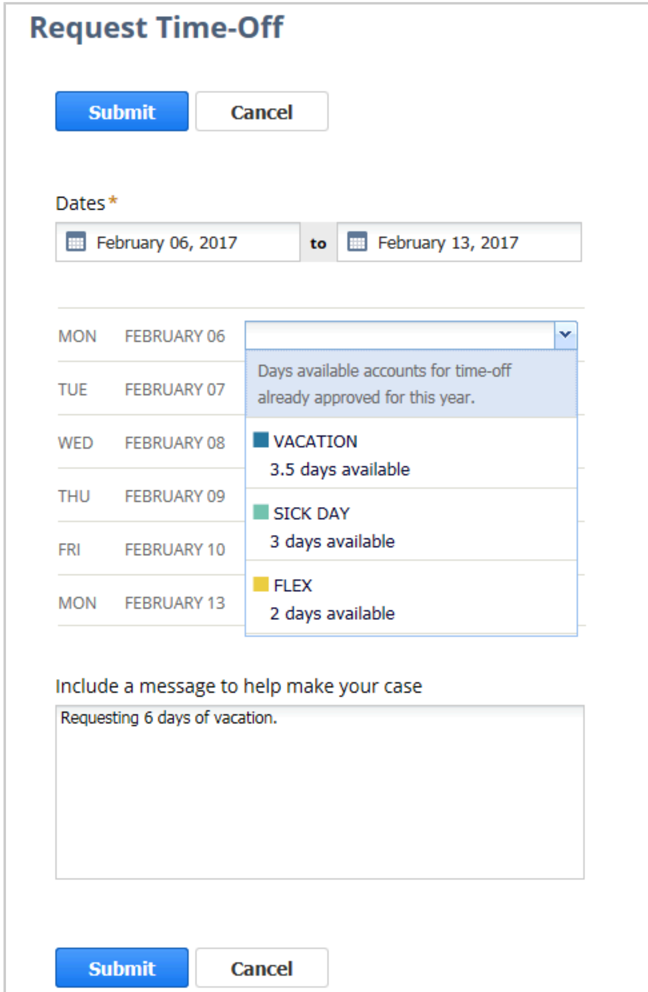
To submit a time-off request:

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.



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.

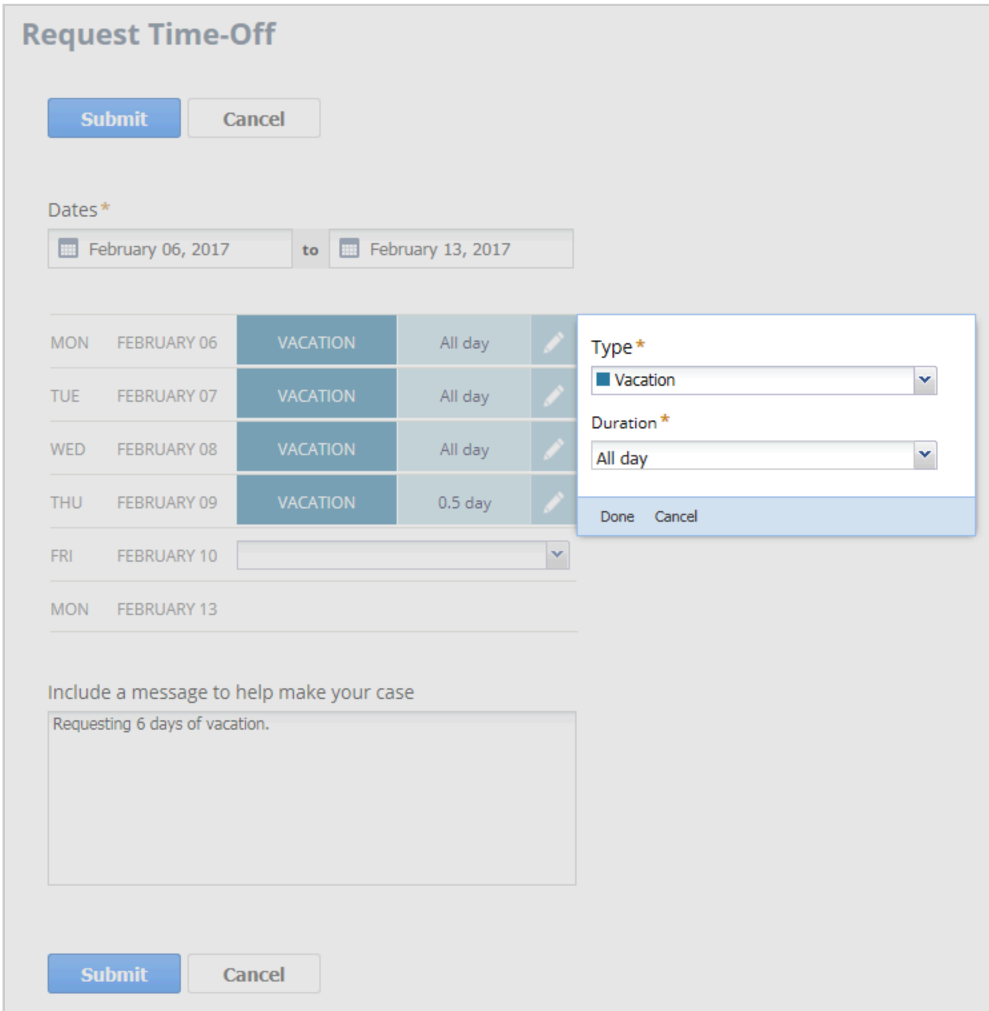
   You can also use a combination of time-off types for a time-off request. For example, you can specify that you want to use a combination of vacation days and floating holidays.

   The displayed days available takes into account time off that has already been approved for the year, but that you have not taken.

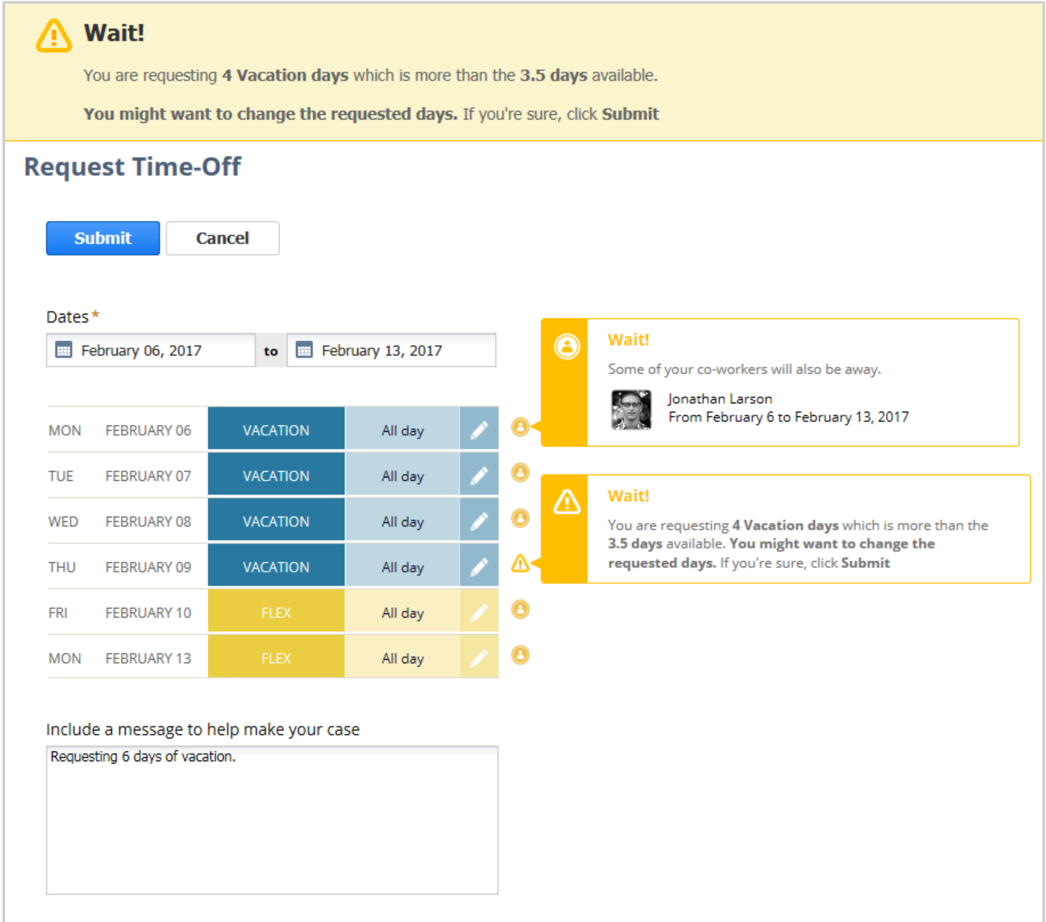
   If the time-off type is tagged as track only, no time off is accumulated, and only your usage is tracked. For example, you have no limit to the number of sick days that you can take. The sick day time-off type is tagged as track only.

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.

5. 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**.



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.



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

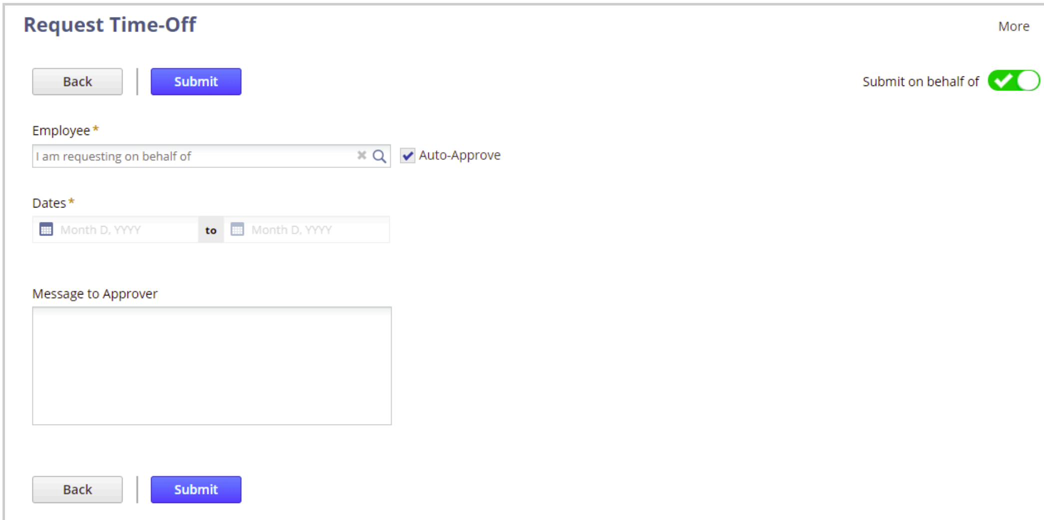
Managers may only submit requests on behalf of employees who are direct reports. The employee must be active and have available time-off entitlements.

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.

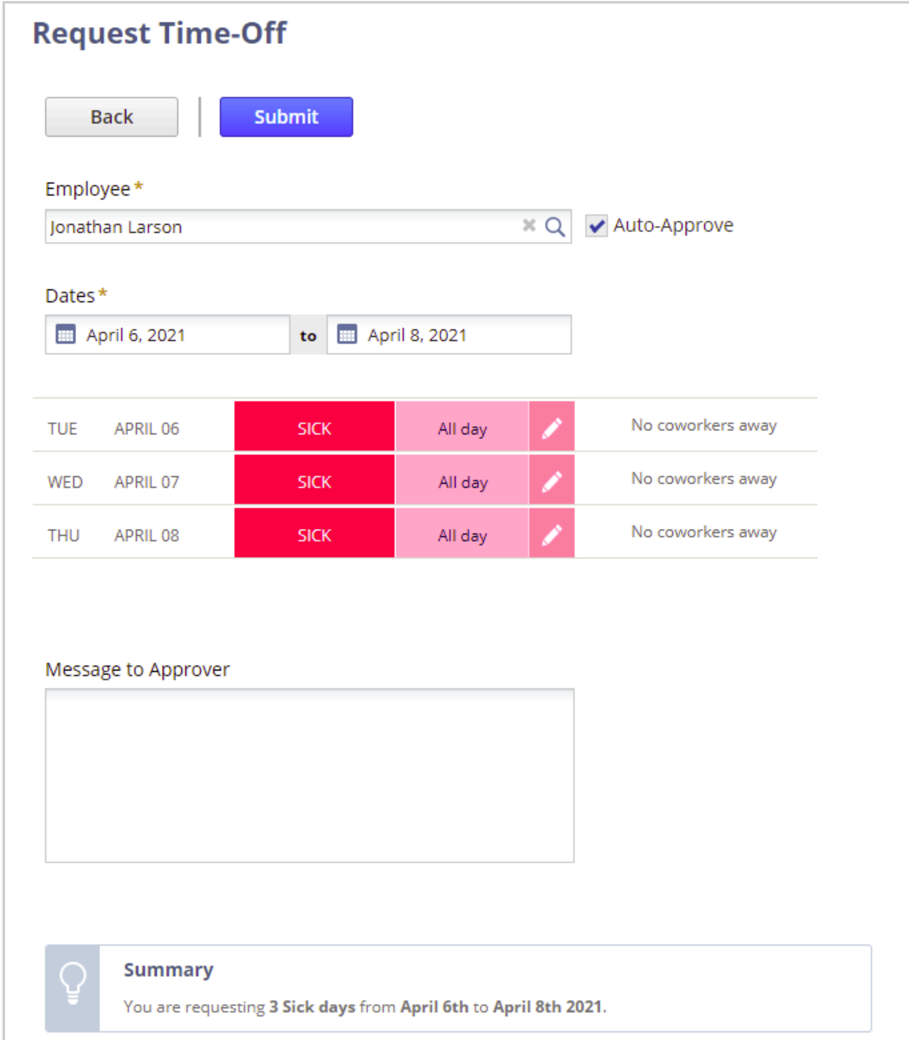
To submit a time-off request on behalf of an employee:

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**.



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.



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.

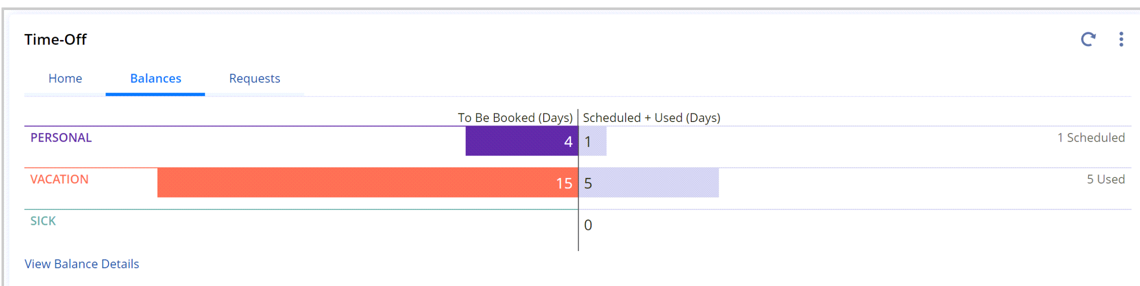
To view time-off requests:

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**.

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**.

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.

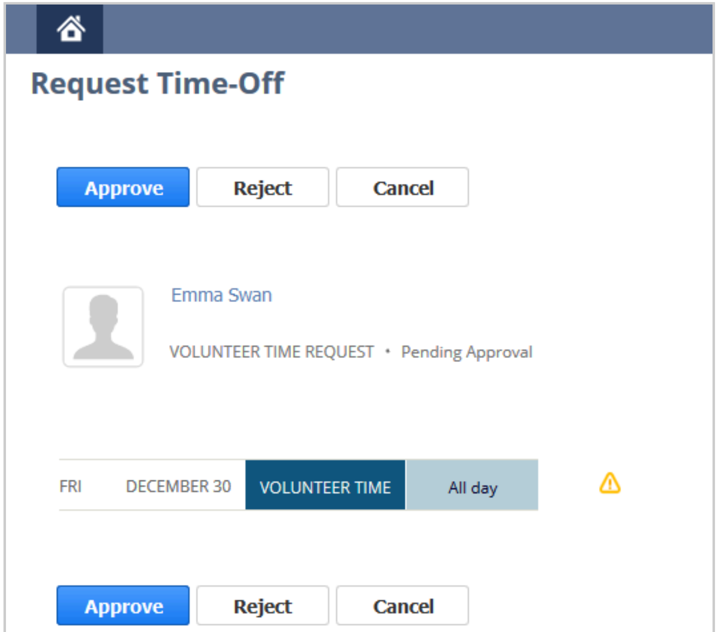
   Rejected time-off requests cannot be resubmitted.

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.



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.

3. Click **Approve**, **Reject**, or **Cancel**.

   If you click Reject, you are prompted to enter a comment, which is sent to the employee.

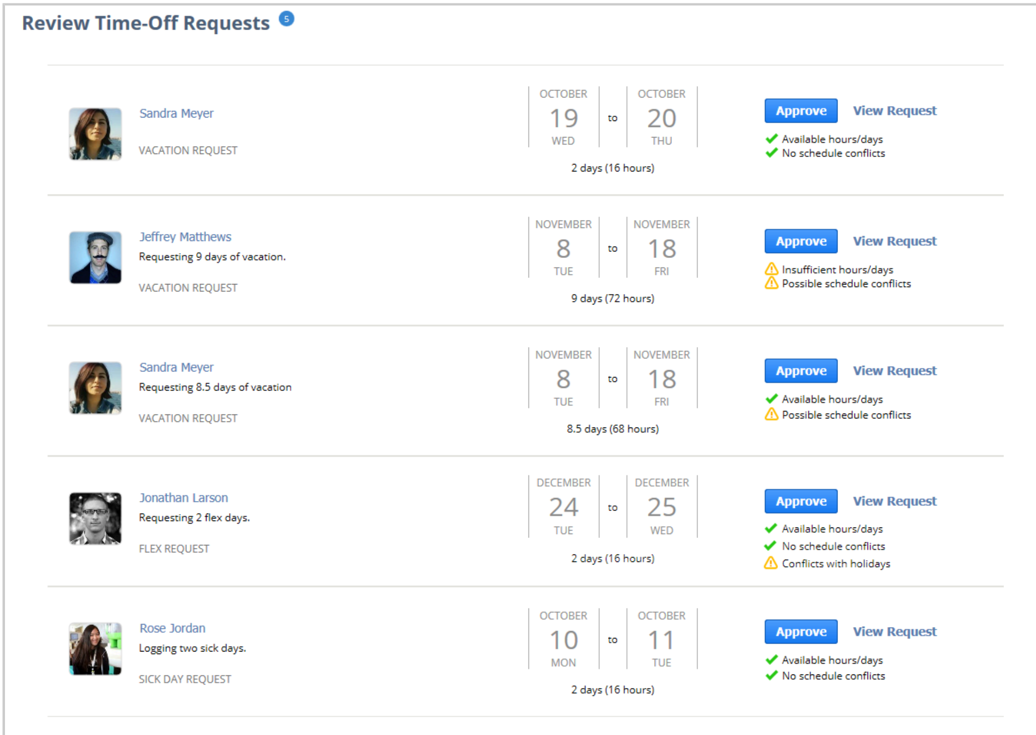
   Note: A rejected request cannot be resubmitted or canceled.

Viewing all Time-Off Requests Waiting for Approval

To view all time-off requests waiting for approval:

1. 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.



2. 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.

Time Tracking

Important: These are general directions for entering time transactions. Your company may have special policies or procedures to follow. Your company also may have customized the time entry forms, so field names and order of display might be different than outlined here. For more information, contact your supervisor or account administrator.

Learn more about time tracking in the following topics:

- Entering a Time Transaction
- Weekly Time Tracking
- Editing Time Entries
- Time Reports
- Approving Time Entries

Entering a Time Transaction

Note: To receive daily reminders to enter your time, set up an event using the Employee Center Calendar. For details, see Scheduling an Event.

To enter a time transaction:

1. On the **Employee Center – Home Links** portlet, under **Time Tracking**, click **Track Time**.

   The current date is inserted as the posting date of this time transaction.
2. If necessary, enter or pick a new date.
3. Select a name in the **Customer** field.
4. If this time is billable to the customer, check the **Billable** box.
5. Select the item that describes what was done during this time in the **Service Item** field.
6. If a payroll item applies to this transaction, select it from the **Payroll Item** dropdown list.
7. If your company tracks departments, classes or locations, select the applicable information in those fields.
8. In the **Duration** field, do one of the of the following:
   - Enter the total time you worked on this service item. For example, enter **4:30** to indicate four hours and 30 minutes of work.
   - If you want NetSuite to calculate your time worked, click the **Calculate** icon. Enter the times you start and end work in the form **10:00 AM**. Enter any time spent in breaks in the form **0:30** to indicate thirty minutes.
9. Enter optional comments in the **Memo** field.
10. When you have finished entering time for this service item or customer:
    - To submit this transaction and return to the Employee Center, click **Save**.
    - To submit this transaction and add another time entry, click the arrow on the **Save** button (Save ▾), and then click **Save & New**.
    - If you have entered time for this week, to print the week's time, click the **Print** button ().
    - To enter time for another week, click **Prev Week** or **Next Week**.

To use the timer for an entire day's work:

1. On the **Employee Center – Home Links** portlet, under **Time Tracking**, click **Track Time**.
2. Enter today's date, or click **Pick** to choose the date from a calendar.
3. Enter other information appropriate to this time.
4. Next to the **Duration** field, click **Timer**.

   The Timer window opens.
5. When you begin working, click **Start**.
6. When you take a break, click **Pause**.
7. When you come back from a break, click **Start** again.
8. When you finish working, click **Stop**.
9. Click **Submit**.

   The elapsed time automatically shows up in the **Duration** field on the Time Tracking page.

   NetSuite rounds down to the nearest minute. For example, if the **Elapsed Time** field on the Timer shows **1:03:55, 1:03** shows in the **Duration** field on the Time Tracking page.

10. Click **Save**.

Weekly Time Tracking

You can track your time by the week rather than entering individual, daily time transactions.

To enter a weekly timesheet:

1. On the **Employee Center – Home Links** portlet, under **Time Tracking**, click **Weekly Time Tracking** or **Weekly Timesheet**.

   NetSuite inserts the first day of the current week as the week of this timesheet.
2. If necessary, in the **Date** or **Week Of** field, enter or pick a new date.
3. Select a name in the **Customer** field.
4. If this time is billable, check the **Billable** box.
5. In the **Service Item** field, select the item that describes what was done during this time.
6. If a payroll item applies to this transaction, select it from the **Payroll Item** dropdown list.
7. If your company tracks departments, classes, or locations, select the appropriate information.
8. Enter a memo about this week's time.
9. In the day of the week columns, enter the total amount of time you worked for this customer and service item on each day. For example, enter **8:00** for eight hours worked.
10. Click **Add**, and then repeat steps 3 to 9 for other customers.

    > **Note:** To remove a row that was added in error, click the row, and then click **Remove**.
11. When you finish entering time for the week:
    - Click **Save** to submit this transaction and return to the Employee Center.
    - Click **Save & New** to submit this transaction and enter another.
    - Click **Prev Week** or **Next Week** to enter time for another week.

To save time, you can copy a weekly timesheet. This way, all of your regular projects or customers can be copied from week to week. You can edit the time spent on each project or with each customer, or add new projects and customers.

To copy a weekly timesheet:

1. On the **Employee Center – Home Links** portlet, under **Time Tracking**, click **Weekly Time Tracking** or **Weekly Timesheet**.

   NetSuite inserts the first day of the current week as the week of this timesheet.
2. If necessary, in the **Date** or **Week Of** field, enter or pick a new date.
3. Click **Copy Previous Week**.
4. In the Copy Previous Week dialog, confirm the timesheet that you want to copy, and then click **Copy**.
5. Make any appropriate changes to the timesheet.

   > **Note:** If you want to exclude a customer or project from the timesheet, set the time for that customer or project to zero. This does not remove the customer or project from the timesheet, but it does ensures that the customer or project is not billed for the time.
6. Click **Save**.

Editing Time Entries

If your supervisor or time entry approver has not approved a time entry (that is, the status of the time entry is pending approval), you can edit it. If you need to edit a timesheet after it has been approved, contact your supervisor.

To edit a time entry

1. On the **Employee Center – Home Links** portlet, under **Time Tracking**, hover over **Track Time**, and then click **List**.
2. Beside the time entry that you want to edit, click **Edit**.
3. On the Time Tracking page, make your changes.
4. Click **Save**.

To edit a weekly timesheet:

1. On the **Employee Center – Home Links** portlet, under **Time Tracking**, hover over **Weekly Time Tracking** or **Weekly Timesheet**, and then click **List**.
2. Beside the timesheet that you want to edit, click **Edit**.
3. On the Weekly Time Tracking page, make your changes.

   If you want to exclude a customer or project from the timesheet, set the time for that customer or project to zero. This does not remove the customer or project from the timesheet, but it does ensures that the customer or project is not billed for the time.
4. Click **Save**.

Time Reports

In the Employee Center, you can click **View Time Reports** to view the Time by Employee Summary report, which shows the sum of all time entered during a specified time period. You can use the date fields in the footer to select the time period.

When viewing the Time by Employee Summary report, you can click the total to view the Time by Employee Detail report, which shows a list of individual time records entered for each employee, subtotalled by employee.

To view a time report:

1. In the **Employee Center – Home Links** portlet, under **Time Tracking**, click **View Time Reports**.
2. You can change the data that appears on this report by changing the filters at the bottom of the page.
   - In the **Date** field, select the time period to report.
   - If you choose a custom date range, enter or pick the first date in the **From** field and the last date in the **To** field.
   - To show the Report in a text format, select **Report**.
   - To show the Time Report in graph form, select which type of graph you want. Enter a numeric value in the **Graph Top** field to set the amount of customers or projects to show in the graph.
   - In the **Viewer** field, select the software you want to use to view this report.
3. Click **Refresh**.
4. To see detailed information, click the time totals.
5. To print the report, click **Print** at the bottom of the page.
6. To export the report into a spreadsheet, Microsoft Word or Microsoft Excel file, click **Export**.

Approving Time Entries

If you are a supervisor or a time approver, you can approve time entries in the Employee Center.

> **Important:** After you approve a time entry, you cannot edit the time entry in the Employee Center. You might be able to edit the time entry from another role in NetSuite. For more information, contact your administrator.

To approve time entries:

1. In the **Employee Center – Home Links** portlet, under **Time Tracking**, click **Approve Time**.

   > **Note:** The Approve Time link appears only if you are a supervisor and an administrator has enabled the Requires Approvals on Time Records feature.

2. On the Approve Time page, a list of all time entries waiting for approval are displayed. Under the **Approve** column, check the boxes next to the time entries that you want to approve.
3. Click **Submit**.

Reminders

The Reminders portlet shows you items in NetSuite that require a response from you. You can add reminders that are relevant to your role. For example, you might want to be reminded about event invitations that you need to respond to, or employee reviews that you need to complete. Some reminders might be added automatically to your Reminders portlet, depending on the features that your administrator has enabled in NetSuite. For example, if the Expense Reports feature is enabled and you are a manager, the Reminders portlet automatically displays the expense reports that require your approval.

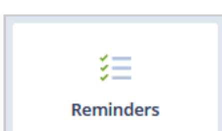
> **Note:** If a reminder has no results (for example, if you have no expense reports to approve), it does not appear in the Reminders portlet, even if the reminder is automatically added. To show reminders with zero results, when you set up reminders, check the **Show reminders with zero results** box. For more information, see Setting Up Reminders.

Setting Up Reminders

Before you can set up reminders, make sure that the Reminders portlet appears in your Employee Center. For more information, see Customizing the Dashboard.

To add a Reminders portlet:

1. If you do not see the Reminders portlet on your dashboard, click the **Personalize** link in the upper right corner of your dashboard. You can also use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **Reminders** icon or drag it onto the dashboard.

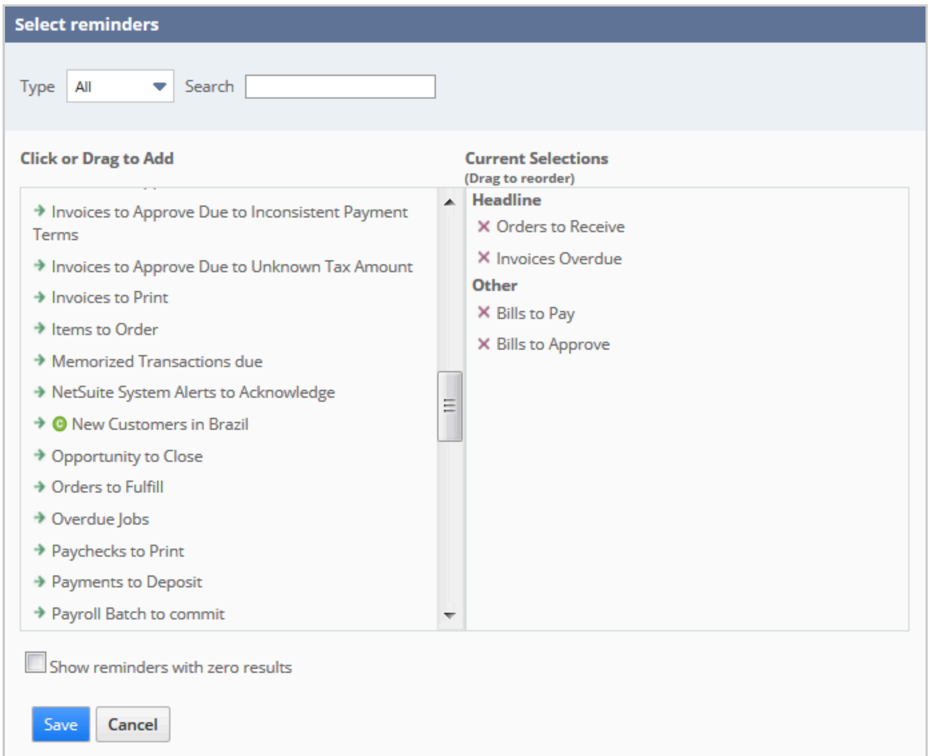


To set up the Reminders portlet:

1. In the Reminders portlet menu, click **Set Up**.
2. Click a reminder in the left list or drag it to the **Current Selections** list on the right.

   The reminders are arranged alphabetically. Custom reminders are marked with .

   The available system-defined reminders depend on your role and the features enabled in your account. For a list of the reminders NetSuite offers, see Choosing Reminders . Custom reminders are available when saved searches to which you have access are marked as available for reminders. For information, see Creating Custom Reminders from Saved Searches.



3. You can change the order in which reminders appear in the Reminders portlet by dragging them up or down in the list.
4. If you want a reminder to be headline reminder, drag it under the **Headline** section.

   Headline reminders are displayed in the upper part of the portlet and use a more prominent layout.
5. If you want reminders to appear in the portlet even when there are no results to display, select **Show reminders with zero results**.
6. When ready, click **Save**.

   A count and a link is displayed for each reminder that has matching results. Click the reminder link to display the related task or search results.

   > **Note:** To see continually updated results for reminders, refresh the portlet periodically.

When your reminders are due, links show for each reminder in the Reminders portlet. Click the name of a reminder to follow the link and complete the task. Click **Update** in the Reminders portlet to refresh your reminders.

You can apply highlighting rules to any of your reminders. Each highlighting rule adds a color indicator to the reminder whenever the specified threshold is reached.

To set up highlighting rules:

1. In the Reminders portlet, point to a reminder that you want to edit and click the edit icon .
2. To add a highlighting rule, click **Add Rule**, choose the color to use, and specify the threshold.

   You can specify as many rules as you need.

3. Click **Save** to apply the highlighting rules.

You can also rearrange reminders on the portlet to suit your preferences. In the Reminders portlet, click and hold a reminder, and then drag the reminder to another spot in the portlet.

Choosing Reminders

You can set up reminders that appear in the Reminders portlet before or after an event occurs in NetSuite. Clicking a reminder takes you to the page where you can complete an action.

For example, you can set a reminder for printing checks. When checks need to be printed, a reminder appears in the Reminders portlet. You can click the reminder to go to the Print Checks page.

The following reminders are available based on your role, the features you use and the permissions assigned to you:

Reminder	Description
Bills to Approve	Reminds you of vendor bills pending for your approval. Clicking this reminder takes you to Approve Bills page. **Note:** This reminder is only available when your administrator configures the required permissions in the Employee Center role.
Calls that are overdue	Reminds you of phone calls that are overdue. Clicking this reminder takes you to a list of phone calls filtered to show only calls that are overdue.
Calls to complete	Reminds you of phone calls that are not complete. Clicking this reminder takes you to a list of phone calls filtered to show only calls you need to complete.
Cases to respond to	Reminds you of cases you need to resolve. Clicking this reminder takes you to the Cases page.
Direct Deposits to Print	Reminds you of Deposits you need to print. Clicking this reminder takes you to the Print Deposits page.
Employees to Review	Reminds you of the number of employees you need to review. Clicking this reminder takes you to your Employees list.
Employees with an Expiring Authorization	Reminds you of employees who have authorizations expiring.

<table>
<tr><th>Reminder</th><th>Description</th></tr>
<tr><td>Employees with an Expiring Visa</td><td>Reminds you of employees who have visas expiring.</td></tr>
<tr><td>Employees with an Upcoming Anniversary</td><td>Reminds you of employees who have upcoming anniversaries.</td></tr>
<tr><td>Employees with an Upcoming Birthday</td><td>Reminds you of employees who have upcoming birthdays.</td></tr>
<tr><td>Event Invitations to respond to</td><td>Reminds you of invitations you need to respond to. Clicking this reminder takes you to the Events List page.</td></tr>
<tr><td>Expense Reports to Approve</td><td>Reminds you of expense reports you need to approve. Clicking this reminder takes you to the Approve Expense Reports page.

Note: If your administrator has enabled the Expense Reports feature and if you are a manager, this reminder automatically appears in the Reminders portlet.</td></tr>
<tr><td>Paychecks to Print</td><td>Reminds you of paychecks you need to print. Clicking this reminder takes you to the Print Paychecks page.</td></tr>
<tr><td>Purchase Orders to Print</td><td>Reminds you of purchase orders you need to print. Clicking this reminder takes you to the Print Purchase Orders page.</td></tr>
<tr><td>Purchase Requests to Approve</td><td>Reminds you of purchase requests entered by employees that you need to approve. Clicking this reminder takes you to the Approve Purchase Requests page.

Note: If your administrator has enabled the Purchase Requests feature and if you are a manager, this reminder automatically appears in the Reminders portlet.</td></tr>
<tr><td>Requisitions to Approve</td><td>Reminds you of the requisitions from your employees that require your approval. Clicking this reminder takes you to the Requisitions page.

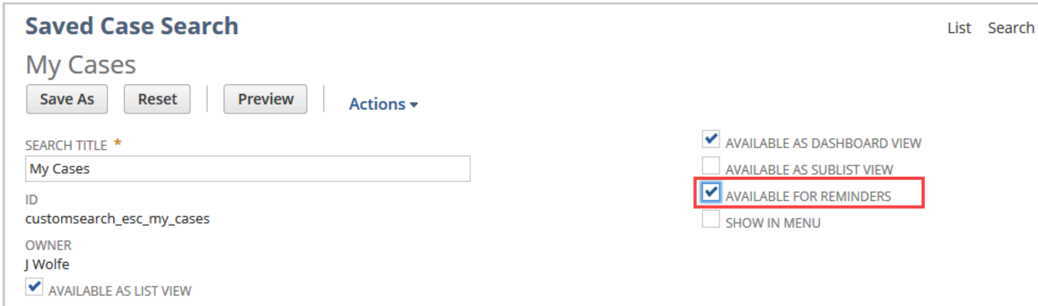
Note: If your administrator has enabled the Requisitions feature and set up an approval workflow for requisitions, and if you are a manager, this reminder automatically appears in the Reminders portlet.</td></tr>
<tr><td>Tasks due today</td><td>Reminds you of tasks assigned to you that are due today. Clicking this reminder takes you to a tasks lists filtered to show only tasks due today.</td></tr>
<tr><td>Tasks that are overdue</td><td>Reminds you of tasks assigned to you that are overdue. Clicking this reminder takes you to a tasks list filtered to show only your overdue tasks.</td></tr>
<tr><td>Tasks to complete</td><td>Reminds you of tasks assigned to you that are not complete. Clicking this reminder takes you to a tasks list filtered to show only tasks you need to complete.</td></tr>
<tr><td>Time Records to Approve</td><td>Reminds you if you need to approve the time of subordinates. Clicking this reminder takes you to the Approve Time task.</td></tr>
</table>

Creating Custom Reminders from Saved Searches

If the reminders provided by NetSuite do not meet all of your needs, you can create your own reminders and add them to the Reminders portlet on your dashboard. Each reminder is based on a count of the results of a saved search. For more information about saved searches, see Saved Searches.

To create a custom reminder:

1. Create a new saved search or edit an existing saved search. See Saved Searches.
2. On the saved search definition page, check the **Available for Reminders** box.



3. Make sure that the search name is suited for display in the Reminders portlet.

   The search name is displayed in the Reminders portlet, with the format: <number_of_results> <saved_search_name>
4. On the **Results** subtab of the saved search, check whether any summary types that group search results are included.
   - Custom reminders work best for saved searches that do not have any grouped results because reminders are based on a count of the number of results and only display when this count is a non-zero integer.
   - If you set up a reminder for a saved search that groups results by a summary type other than a count, the reminder does not display.
   - You can define a count for a grouped field to make the reminder display, but the reminder result is affected by the grouping and may not include the total count of saved search results.
   - It may be best to remove summary types or recreate the search without summary types for use as a reminder.
5. Click **Save** to save the search.

To add a custom reminder to the Reminders portlet:

1. Go to your home page. If this page does not include a Reminders portlet, click **Personalize Dashboard** and add it. See Setting Up Reminders.
2. In the Reminders portlet menu, click **Set Up**.
3. In the **Type** menu, select **Custom**.

   The custom reminders available in your account are displayed. Each custom reminder is marked with a C icon.

   Note that all saved searches that you have access to are listed if the **Available for Reminders** box is checked. The list is not limited to searches that you have created.
4. Click a reminder in the left list or drag it to the **Current Selections** list on the right.
5. To change the order in which reminders appear in the Reminders portlet, drag the reminders up or down in the list.
6. If you want a reminder to be used as a headline reminder, drag it under the **Headline**.

   Headline reminders appear in the upper part of the portlet and use a more prominent layout.
7. If you want the reminders to be shown even when there are no results to display, select **Show reminders with zero results**.
8. When ready, click **Save**.

The Reminders portlet displays a count of search results. Click a custom reminder to see detailed search results and complete related tasks.

Note: If a custom reminder causes an error that prevents the Reminders portlet from displaying reminder links properly, click Set Up in the Reminders portlet menu, remove the reminder from the Current Selections list, and click Save.

Kudos

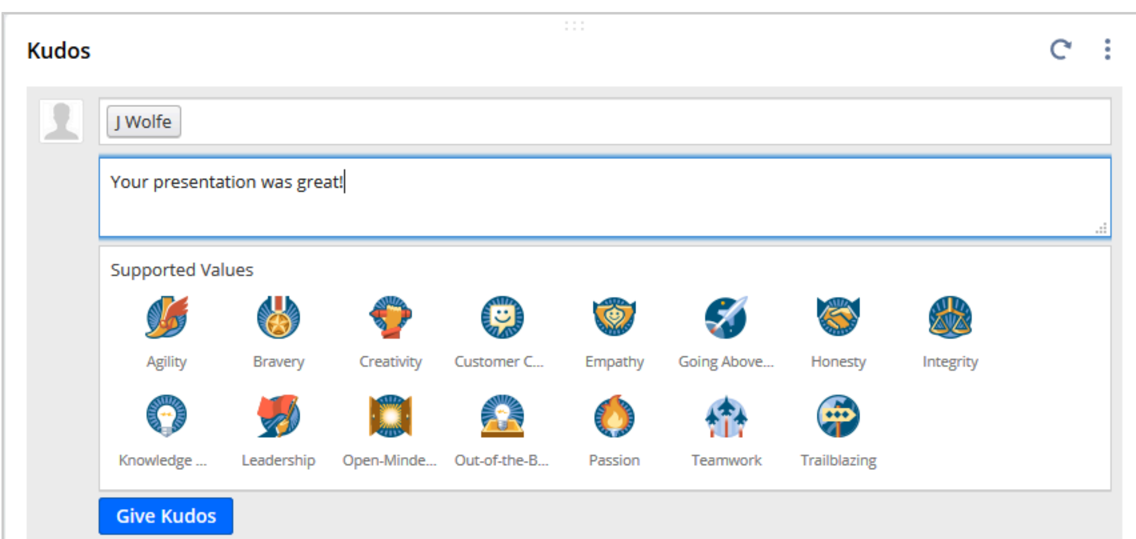
You use Kudos to recognize your coworkers for a job well done. You can give Kudos to someone for making an outstanding contribution, providing a great idea, or helping you on a project. In the Kudos portlet, you can also view the other Kudos that are given throughout your organization.

Giving Kudos to Coworkers

When you give Kudos to coworkers, you describe why you are giving them Kudos, and then choose organizational values that your coworkers demonstrated. You can give Kudos to more than one coworker at a time to recognize a group achievement.

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 appears in the Kudos portlet.

Interacting with Kudos

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. You can interact with Kudos in the following ways:

- To show support for a Kudos that someone else has given, click the thumbs up icon ( ) beside the Kudos. A number beside the icon indicates how many people support the Kudos.
- By default, the Kudos portlet shows Kudos given across your entire company. To filter the Kudos to just one department, from the **My Company** list, 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 then click **Search**.

Goals

With the Performance Management feature, you can set goals for yourself, manage your goals, track your goals, and receive feedback from your manager. Your goals also appear on your performance reviews to help you reflect on your performance.

You can access and manage your goals in the Employee Center by going to Talent > Goals. This page displays goals you have planned, goals you are working on, and closed goals. You own your goals, and you can make changes to your goals as you work toward achieving them.

Your manager cannot edit your goals or create goals for you. Instead, you and your manager can collaborate on goals by adding and responding to comments. Your manager needs to approve your planned goals before you can change the status of goals to in progress.

> **Tip:** To help you keep your goals up-to-date and relevant, you can set up reminders for yourself to review your goals. For information on how to set up reminders in NetSuite, see Setting Up Reminders.

Watch the following help video for more information about managing your own goals:

Managing Goals in the Employee Center

To learn more about goals, explore these topics:

- Creating Goals
- Standard Performance Metrics
- Editing Goals
- Adding Comments to 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.

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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.

Standard Performance Metrics

You can use the following standard performance metrics to track the actual value of your goals. Your organization can also create its own performance metrics. If you cannot find a performance metric that works for you, talk to your administrator about creating a new one.

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. **Note:** 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.
Cases Closed (#)	The number of cases that you close.
Kudos Received	The number of Kudos that you receive.

Performance Metric	Description
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. **Note:** To use this performance metric, the projects that you are a part of should use both project tasks and baselines.
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

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 makes 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 Adding Comments to Goals.

4. When you finish editing, click **Save**.

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.

Viewing Goals

You can view your own goals on the Goals page and an overview of your goals on the Goals portlet. 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. If you are a manager, you can also view your direct reports' goals. For more information, see Viewing the Goals of Your Direct Reports.

Viewing Your Goals

You can view your own goals on the Goals page and the All Goals page.

To view your current goals:

1. From the home screen of your Employee Center role, go to Talent > Goals.
2. Click the goal that you want to view.

You can view all your goals, including goals that were closed for three months or longer, on the All Goals page.

To view all your goals:

1. From the home screen of your Employee Center role, go to Talent > Goals.
2. At the bottom of the Closed column, click the **Looking for all your goals?** link.
3. If you want to filter the **All Goals** page, do any of the following:
   - 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 area of focus, from the **Area of Focus** list, select an area of focus.

     Note: This is only available when one employee is selected.
   - 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 clear all the filters on the page, click **Clear All Filters**.

As an employee, you can view a history of all your changes to your goals that are marked 'In Progress' to stay aligned on the progress of the goal.

To view your goal change history:

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.

The History subtab shows which fields of the goal were changed, the content of the changes, and when the changes were made.

Changes to a goal are only tracked after your manager approves your goal.

Viewing Goals in the Goals Portlet

The Goals portlet shows an overview of the actions you should take on your goals and an overview of your top three goals in progress.

Tip: Click the name of any goal in the portlet to view the goal card.

Portlet Tab	Description
My Actions	Displays the following information about your own goals: ■ **Goals Starting Soon** – Displays goals that are starting in two weeks or less.

Portlet Tab	Description
	■ **Goals Due Soon** – 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. ■ **Overdue Goals** – 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.
My Goals	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.

Deleting Goals

As an employee, you can delete any of your goals if they have not been approved by your 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 the help topic Viewing All Goals.

Areas of Focus

With areas of focus, you can collaborate with your manager on a list of areas that you want to focus on to develop your career. You can revisit these areas at key opportunities to ensure that you are proactively thinking about your development.

You can access and manage your areas of focus in the Employee Center by going to Talent > Goals > View My Areas of Focus. This page displays your current and archived areas of focus. You can create, edit, delete, and archive areas of focus.

You can also create, edit, delete, and archive areas of focus from your performance review. For more information, see Managing Your Areas of Focus.

If you are a manager, you can provide guidance to your direct reports by creating areas of focus for them, For more information, see the help topic Creating Areas of Focus for Your Direct Reports.

Managing Your Areas of Focus

You can 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.

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 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 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 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 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.

Performance Reviews

After your organization launches performance reviews, you receive an email notification to let you know that you have a review to complete. Performance reviews include reflection questions and an overall rating section. To help you reflect on your performance, performance reviews include the goals that you or your direct reports worked on or completed in the review period, and the areas of focus associated with those goals.

Performance reviews also include Kudos you received during the review period

Learn more about performance reviews in the following topics:

- Completing Your Self Review
- Finalizing Your Performance Review
- Completing Performance Reviews as the Reviewer

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.

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.

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**.

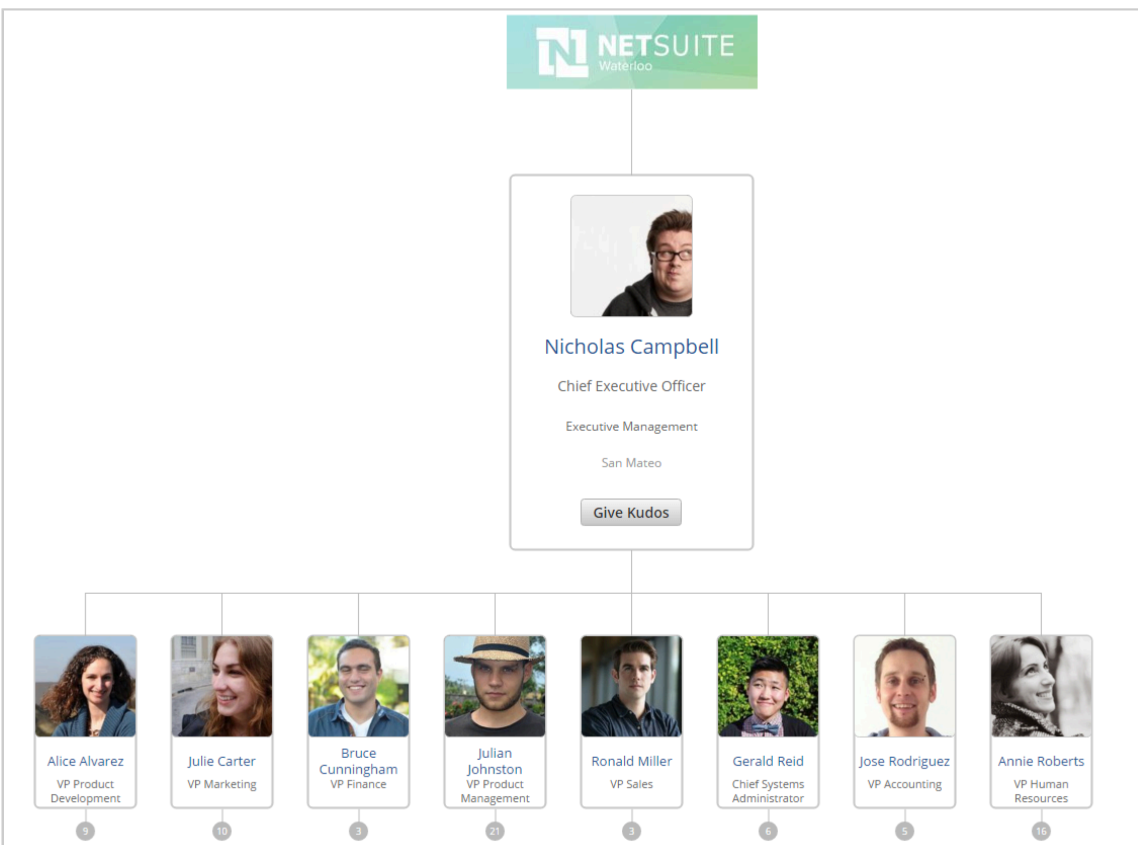
Finding People in Your Company

> **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.

Navigating the Org Browser

The Org Browser provides an intuitive, interactive, and graphic method of viewing the organizational chart for your company, so that you can view the supervisors and direct reports of fellow employees.

To begin, in the Home Links portlet, under My Company, click Org Browser. The Org Browser page appears, showing a tree structure graphic that depicts your organization's hierarchy, 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.



> **Note:** If you do not see the Org Browser option in the Home Links portlet, then your company has not enabled this feature.

You can navigate 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 are viewing an employee lower down in your company's hierarchy, the employee's direct manager is replaced on the org browser by a number. The number indicates the levels of management above the employee. When you hover over that number, the reporting relationship up to the top of your organization appears.

Searching 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.

To search the Employee Directory:

1. In the **Employee Center – Home Links** portlet, under **My Company**, click **Employee Directory**.
2. On the Employee Directory page, start typing the string that you want to search for. As you type, the search field shows employees who match your search term in their name, location, department, job title, or (with NetSuite OneWorld accounts) subsidiary. The more characters you type, the more narrowed the search becomes.
3. To search for employees who have your search term in their location, department, job title, or subsidiary, click the appropriate link in the search field.
4. If you see the name of the person you are searching for in the search field, click the name.
5. To perform a full search, press Enter or click the **Search** button.
6. The Employee Directory page shows a list of employees who match your search term.

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, to view only employees with particular characteristics), check the appropriate box under **Locations**, **Departments**, **Job Titles**, and/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.

To give Kudos from the Org Browser:

1. On the Org Browser page, locate the person you want to give Kudos to, and click the person's card to center it.
2. On the card, click **Give Kudos**.
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 once, then keep adding names.
5. In the text field, type a description for the Kudos that explains why you want to recognize your coworker.
6. Under Supported Values, click one or more organizational values that this Kudos demonstrates. When you hover over a value's icon, a description of that value appears.
7. Click **Give Kudos**.

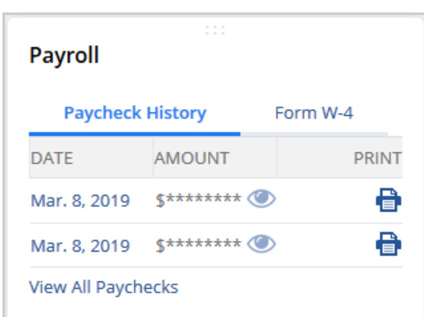
Payroll and Banking Information

You can check and edit information related to how you are paid in the Employee Center. If your company uses SuitePeople U.S. Payroll to pay you, in the Payroll portlet, you can view your paycheck history and your Form W-4. You can also edit your banking information for payments.

Viewing Your Paycheck History

If your company uses SuitePeople U.S. Payroll to pay you, a Payroll portlet appears on the Employee Center home page. The portlet includes information about your latest paychecks and your Form W-4.

> **Important:** If you do not see the Payroll portlet or the Paycheck History link, you cannot view your paychecks in NetSuite. You also cannot view your Form W-4 in NetSuite. For information about your paychecks and your Form W-4, contact your payroll administrator.



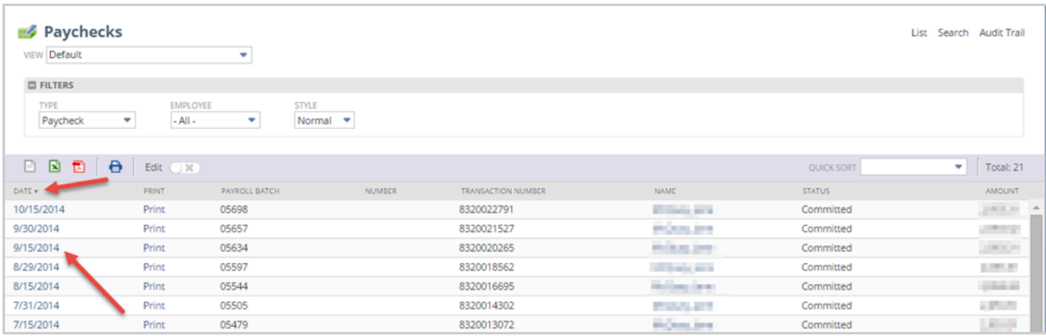
On the Payroll portlet, in the Paycheck History tab, you can see the status of the last five paychecks that you received. For your privacy, the amount of your paycheck is hidden. To see the amount of your paycheck, click . To hide the amount of your paycheck again, click .

To view your paycheck history:

1. On the Payroll portlet, click the **Paycheck History** tab.
2. Click **View All Paychecks**.

   The Paychecks page displays.

   > **Important:** Do not change the value in **View** dropdown box. Leave the value as **Default**.



3. On the Paychecks page, do any of the following:
   - To change the order of the list, click the arrow next to the **Date** column header.
   - To generate a PDF check stub that you can then print for your records, click **Print** next to any paycheck on this list.
   - To display the details of that specific paycheck, click the date link.
   - To quickly sort the list of paychecks by recently created, recently modified, or recently viewed, select an option in the **Quick Sort** field
4. To export your paycheck information, in the header row above the list, click one of the following icons:
   - — the CSV Export icon
   - — the Excel icon
   - — the PDF icon

   > **Note:** To export your paycheck information, your employee center account must have the Export Files permission. For more information, contact your account administrator.

5. To print out the list of paychecks, click .

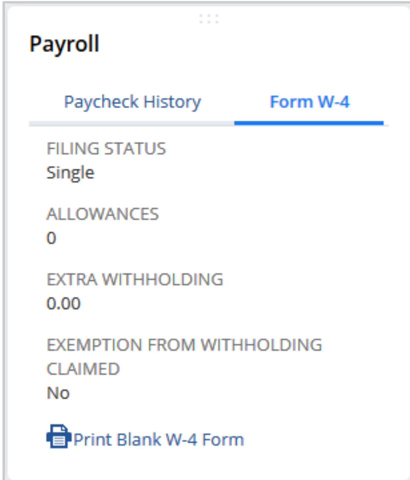
> **Note:** In the **Filters** section, you can use the **Type** dropdown to switch to the Expense Reports page to view a list of your expense reports, or switch to the Purchase Requests page to view a list of your purchase requests.

Viewing Your Form W-4

For tax purposes, each employee is required to complete the Form W-4 so that the correct amount of Federal income tax is withheld.

You can log into the Employee Center and view your current Form W-4 information at any time. Changes to Form W-4 require additional processing by your payroll department. You cannot make the changes yourself within NetSuite. Contact your payroll department to find out how to change your Form W-4.

To view your Form W-4, on the Payroll portlet, click the **Form W-4** tab.



Important: If you do not see the Payroll portlet, you cannot view your Form W-4 in NetSuite.

Your Banking Information

If your company uses SuitePeople U.S. Payroll to pay you, you may be able to set up your payment preferences in the Employee Center. If this feature is available to you, you can update your net bank account and set up secondary bank accounts.

Watch the following help video for information about setting up your payment preferences in the Employee Center:

Setting Up Payment Preferences in the Employee Center

Learn more in the following topics:

- Adding Your Net Bank Account
- Switching Your Net Payment Method from Direct Deposit to Check
- Adding Secondary Bank Accounts
- Editing Bank Accounts
- Checking the Status of Bank Accounts

Adding Your Net Bank Account

Your net bank account is the account into which either your entire pay is deposited or remaining funds are deposited after deposits to your secondary accounts.

To add your net bank account:

1. On the **Home Links** portlet, click **My Information**, and then click **My Banking Information**.
2. In the Net Account Details section, click the edit icon ( ).
3. In the Pay By section, choose **Direct Deposit**.
4. Enter the **Bank Name**, **Routing Number**, and **Account Number** for your bank account. You can find this information on a check from your bank.

5. Choose an **Account Type**.
6. At the bottom of the page, check the box authorizing payments to the account.
7. Click **Submit**.

After you add a direct deposit bank account, it takes at least two business days for your changes to take effect. For information about how to check the status of your bank account, see Checking the Status of Bank Accounts.

Switching Your Net Payment Method from Direct Deposit to Check

Depending on your organization's settings, you may be able to switch your net payment method to check.

To switch your payment method from direct deposit to check:

1. On the **Home Links** portlet, click **My Information**, and then click **My Banking Information**.
2. In the **Net Account Details** section, click the edit icon ( ).
3. In the Pay By section, choose **Check**.
4. Check the box authorizing payments.
5. Click **Submit**.

Adding Secondary Bank Accounts

You can set up secondary bank accounts that portions of your pay are deposited into. For example, you may want to deposit a portion of your pay into a savings account. The payment method for secondary bank accounts is always direct deposit. You can add up to nine secondary bank accounts. If you require additional accounts, contact your payroll administrator.

To add secondary bank accounts:

1. On the **Home Links** portlet, click **My Information**, and then click **My Banking Information**.
2. Click **Allocate funds to another account**.
3. Enter the **Bank Name**, **Routing Number**, and **Account Number** for the bank account. You can find this information on a check from your bank.

   > **Note:** You can enter any name in the Bank Name field. For example, you might want to distinguish between a savings account and a checking account at the same bank.

4. Choose an **Account Type**.

5. In the **Amount** field, enter the amount that you want to deposit into this account.

   The amount should not exceed your net pay. If the amount exceeds your net pay, your entire net pay is deposited into the account.
6. (Optional) To add additional bank accounts, repeat steps 2 to 5.

   Tip: Funds are deposited into your secondary accounts in the order that you list them. To reorder accounts, move accounts using the handles ( ). Remaining funds are deposited into your net account.
7. Check the box authorizing payments to the account.
8. Click **Submit**.

After you add a bank account, it takes a few days for your changes to take effect. For information about how to check the status of your bank accounts, see Checking the Status of Bank Accounts.

Editing Bank Accounts

If your banking information changes, you can edit your account information in NetSuite.

To edit a bank account for direct deposit:

1. On the **Home Links** portlet, click **My Information**, and then click **My Banking Information**.
2. To edit a specific bank account, next to the account that you want to change, click the edit icon ( ). Do any of the following:
   - To clear all of the information for an account, click **Clear**.
   - To remove an account so that payments are no longer deposited into it, click **Remove Account**. You can remove secondary accounts, but not your net account.
   - To change the information in a particular field, edit the information.
3. To reorder your secondary accounts, move the accounts using the handles ( ).
4. Check the box authorizing payments.
5. Click **Submit**.

After you edit a bank account, it takes at least two business days for your changes to take effect. For information about how to check the status of your bank accounts, see Checking the Status of Bank Accounts.

Checking the Status of Bank Accounts

After you add or edit a bank account, it can take a few days for your changes to take effect. To see whether an account is active or not, you can check its status.

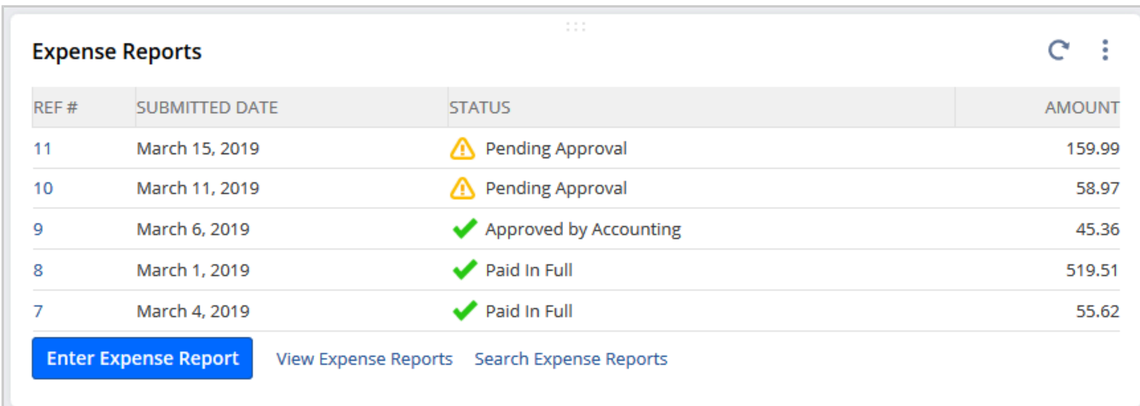
To check the status of bank accounts:

1. On the **Home Links** portlet, click **My Information**, and then click **My Banking Information**.
2. Find the status at the top of each account:
   - **No status** – The account is verified and active. Payments are deposited into this account.
   - **Pending Verification** – The account is still being verified. Payments are not yet deposited into this account.

- **Error: Review and Correct** – The verification process has found errors in the account information. Click the edit icon (), and update the account information. When you are finished, click **Submit**.
- **Error: Contact Administrator** – The verification process has found errors in the account information that require the assistance of your payroll administrator. To resolve the errors, contact your payroll administrator.

Expense Reporting

You can use the Expense Reports portlet to view your most recent expense reports and to enter new expense reports.



Entering Expense Reports

Important: These are general directions for entering an expense report. Your company might have special policies or procedures to follow. Also, your company might have customized the expense report form, so field names and order of display might be different from what is outlined here. For more information, contact your supervisor or account administrator.

To prevent data loss, NetSuite recommends that you save often, especially if you are entering multiple expense reports at once. Click the **Complete Later** button to save your changes

Note: After you submit an expense report, you cannot delete it or make any changes. If needed, contact your approver or supervisor, and have them reject the report.

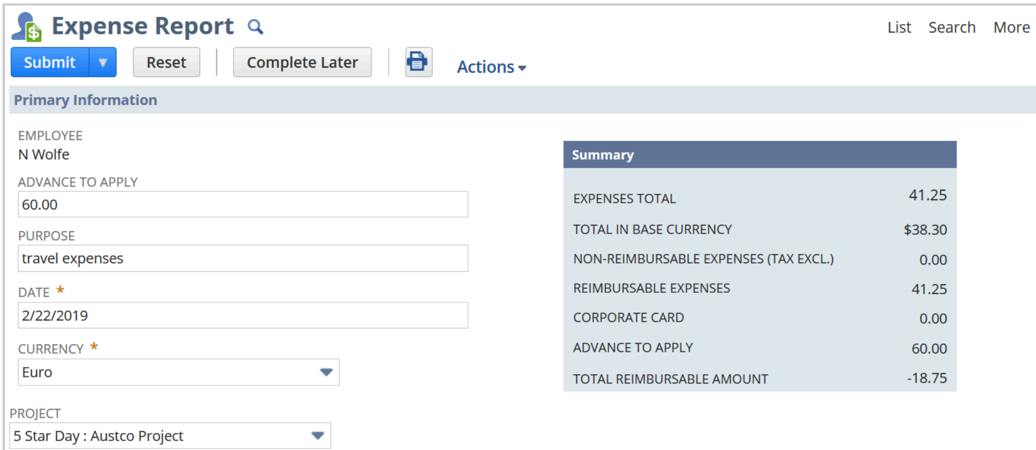
To enter an expense report:

1. In the **Expense Reports** portlet, click **Enter Expense Reports**.
2. NetSuite inserts today's date as the date of this expense report. You can change the date if required.
3. If applicable, in the **Advance to Apply** field, enter an advance that should be applied to any reimbursement for these expenses.
4. In the **Purpose** field, 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 your preferred currency is not available, contact your administrator.

6. If this expense report is associated with a project, select the project for this expense report.



7. Check or clear the **Use Multi Currency** box (as appropriate). This enables the entry of expenses in foreign currencies to be reimbursed in the base currency unless an alternate currency is selected in the **Currency** field above. See About Multi Currency for more information.

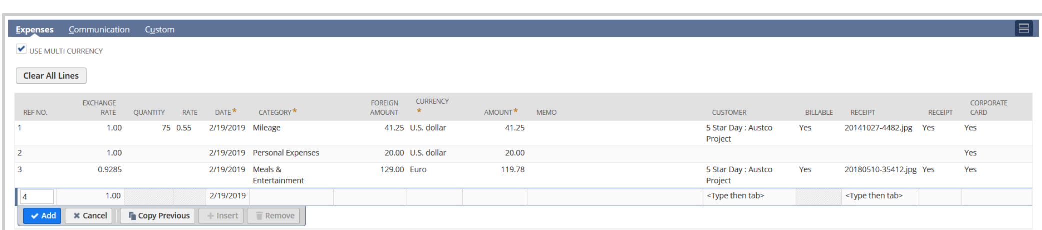
> **Note:** NetSuite automatically tracks and displays values in the **Summary** table as you enter expense information. The **Expenses Total** and **Total Reimbursable Amount** field values are calculated based on the amounts you enter for expense line items.

8. If your company tracks them, review the default values entered for **Department**, **Class**, and **Location**. Make any necessary edits.

> **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.

9. If your company uses American Express integration, on the **Expenses** subtab, you can click **Imported Expenses** to select your corporate card expense transactions to add to this expense report.

10. On the **Expenses** subtab, enter each expense as a separate line item.



   a. The **Ref No.** field is automatically populated with 1 for the first line item on this expense report. You can update this number. Each new line item uses the next successive number. Items are listed in the order you enter them and cannot be sorted. Line item reference numbers are helpful when referencing receipts and individual expenses.

b. In the **Date** column, enter the actual date the expense was incurred. If you do not enter a date, NetSuite automatically inserts today's date.
c. Select an expense **Category**. See About Category for more information.
d. If this expense was incurred in a foreign currency, select the currency, and enter the foreign currency amount.
e. If it is not automatically calculated, enter the exchange rate applicable for this expense. See About Foreign Amount, Currency, and Exchange Rate for more information.
f. In the **Amount** column, enter the amount of the expense.

> **Note:** If this expense required a rate, the amount is calculated once a quantity and rate are entered.

g. Optionally, enter a memo, department, class, or location that applies only to this line item.

> **Note:** If you are entering an intercompany expense and you select a department, a class, or a location that is not available to the subsidiary associated with the selected customer, an attempt to generate an intercompany adjustment for the expense will result in an error.

h. If this item is billable to a customer or project, select it from the **Customer** list, and then check the **Billable** box.
i. In the **Attach File** column, attach a scanned receipt for this item. For more information, see Attaching Receipts to Expense Reports.
j. If you are providing a receipt for this expense, check the **Receipt** box.
k. If your company uses non-reimbursable items and this item is not reimbursable, check the **Non-reimbursable** box.
l. If your company uses corporate credit cards and this expense was charged to a corporate card, check the **Corporate Card** box.
m. Click **Add**.

11. Continue adding expense line items.
12. 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 options:

- To save the report and mark it as complete after you have entered all information, click **Submit**, **Submit & New**, or **Submit & Print**. After an expense report is marked complete, you can no longer make changes to it.
- To save an incomplete form without submitting it, click **Complete Later**. Information on the form is saved, but the form is not submitted for approval

Creating Expense Reports with Imported Expense Transactions

If your company uses American Express Corporate Card Integration, you can create an expense report from the Imported Employee Expenses page. Expense transactions are imported automatically each day.

Expense transactions are imported automatically each day. After 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:

1. Go to Transactions > Employees > Imported Employee Expenses.
2. 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.
3. 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.
4. 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 Entering Expense Reports.

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.

Attaching Receipts to Expense Reports

You can attach receipts to your expense reports in any file format, although your company might specify a preferred file type. Make sure you check with your supervisor or manager before you attach receipts for the first time.

If you already uploaded a copy of the receipt for the expense to your file cabinet, you can attach it to the expense report by selecting the file from the list in the Attach File column field, and then clicking Open. For more information about uploading files to the file cabinet, see File Cabinet.

If you have not yet uploaded a copy of the receipt to the file cabinet, follow the steps outlined here.

To attach a receipt to an expense report:

1. From the list in the **Attach File** column field, select **New**.
2. In the **Attach From** field, specify whether the file you are attaching is from your computer or from the internet.
3. In the **Folder** field, select a file cabinet folder to store the attachment. If you are adding a new file, the default folder selected is the last folder that you selected for uploading. You can either select a folder, or click the **Add** button to create a new folder.
4. Do one of the following:
   - If the file is from the internet, in the **URL** field, specify the URL path for the file.
   - If the file is from your computer, click **Browse**. Browse to the file, and then click **Open**.
5. If applicable, select the proper character encoding for the file.
6. If you want the attachment to be accessible externally, check the **Available Without Login** box. When this box is unchecked, only users who are logged into NetSuite with the correct permission are able to view the documents.
7. To add a time stamp parameter to the URL for this file, check the **Generate URL Time Stamp** box.

8. Click **Save**.

About Category

If you select a category that requires a rate, then quantity and rate fields are displayed.

There are no automatic calculations based on categories. However, this can be manually set up and defined by your administrator.

- Enter the quantity for this expense.
- If a rate is not automatically populated, enter the rate for this expense category. The amount is automatically calculated from the rate and quantity.

About Multi Currency

If your company uses multiple currencies, this can impact both how you enter expenses and how you are reimbursed for expenses.

In the body of the expense report form, the currency selected in the Currency field determines the currency in which you want to be reimbursed. The available currencies listed are determined by your employee record.

> **Note:** If your company uses SuitePeople U.S. Payroll, you can be reimbursed only in U.S. dollars. If you use a corporate card for your expenses, you can be reimbursed only in the same currency as the credit card.

On the Expenses subtab, the Use Multi Currency box is checked by default if you have enabled the Use Multicurrency Expense Reports preference on the General subtab at Home > Set Preferences. When the box is checked, the Foreign Amount, Currency, and Exchange Rate fields are shown for each line item. These fields enable the entry of expenses in foreign currencies to be reimbursed in the base currency unless an alternate currency is selected in the **Currency** field at the top of the expense report.

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.

About Foreign Amount, Currency, and Exchange Rate

If you entered a foreign currency amount for an expense, the expense is automatically converted to your base currency amount in the **Amount** column. This amount is provided as an approximation and might not match the actual reimbursement amount that will be calculated based on the exchange rate at the time of reimbursement.

Any automatically calculated rate is provided as an approximation. The rate at the time of reimbursement is used to calculate the actual reimbursement amount.

Viewing, Editing, and Deleting Expense Reports

Viewing or Editing Expense Reports

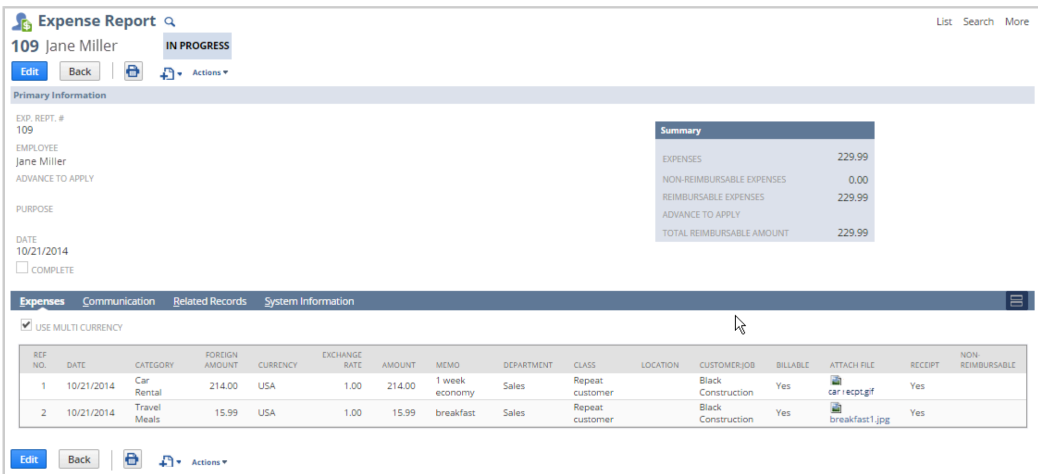
You can view any submitted or in progress expense reports. You can edit only expense reports with the status In Progress or Rejected. If you need to change an expense report after you submit it, ask your manager or supervisor to reject the expense report.

To view or edit expense reports:

1. On the Expense Reports portlet, click **View Expense Reports**.
2. On the Expense Reports page, click **Edit** or **View** next to an expense report.

   You cannot make any changes to or delete expense reports that you have submitted. If needed, contact your approver or supervisor, and have them reject the report.

3. If you are viewing an expense report with the status In Progress, you can click **Edit** to modify or add line items.



4. Make any required changes or additions to the expense report.
5. When you finish editing, click **Submit**, or if you intend to edit the report later, click **Complete Later**.

Viewing the Status of an Expense Report

In the Expense Reports portlet, you can view your five most recent expense reports. To view the status of other expense reports, on the Expense Reports portlet, click **View Expense Reports**.

On the Expense Reports page, locate the appropriate report in the list, and look in the **Status** column.

The possible statuses of an expense report are:

- **Pending Supervisor Approval:** The report has not yet been approved by a supervisor or approver.
- **Pending Accounting Approval:** The report has been approved by a supervisor or approver and forwarded to accounting for approval.
- **Rejected by Supervisor:** The report has been rejected by a supervisor or approver.
- **Rejected by (Overridden) Accounting:** The report has been rejected by accounting after approval from a supervisor or approver.
- **Rejected by Accounting:** The report has been rejected by accounting.

- **Approved by Accounting:** The report has been approved by accounting, but the employee has not been reimbursed.
- **Paid in Full:** The employee has been reimbursed for the amount of the report.
- **In Progress:** The report is saved to complete later. The report has not been submitted.

Deleting an Expense Report

Expense reports can be deleted only if the status is In Progress or Rejected. If you need to delete an expense report after it has been submitted, contact your approver or supervisor and have them reject it. After an expense report is rejected, you can then follow these steps to delete it.

To delete an expense report:

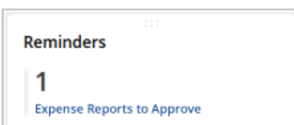
1. On the Expense Reports portlet, click **View Expense Reports**.
2. Beside the expense report that you want to delete, click **Edit**.

   > **Note:** You can delete an expense report only if the status of the expense report is In Progress or Rejected.

3. Select Actions > Delete.
4. In the confirmation window, click **OK**.

Approving or Rejecting Expense Reports

If you are a supervisor and your direct reports submit expense reports, you can find the link to approve expense reports in the Reminders portlet.



Approving Expense Reports

To approve an expense report:

1. On the Reminders portlet, click **Expense Reports to Approve**.
2. Under the **Approve** column, check the boxes next to the expense records you want to approve.
3. Click **Save**.

Rejecting Expense Reports

To reject an expense report:

1. On the Reminders portlet, click **Expense Reports to Approve**.
2. In the list of expense reports, click the date beside the report that you want to reject.
3. Click **Reject**.
4. On the Expense Report Rejection Notice Page, enter a message explaining why you rejected the report, and then click **Save**.

An email message is sent to the employee who submitted the expense report. The employee can make changes to the rejected expense report and submit it again for approval.

Purchase Requests and Requisitions

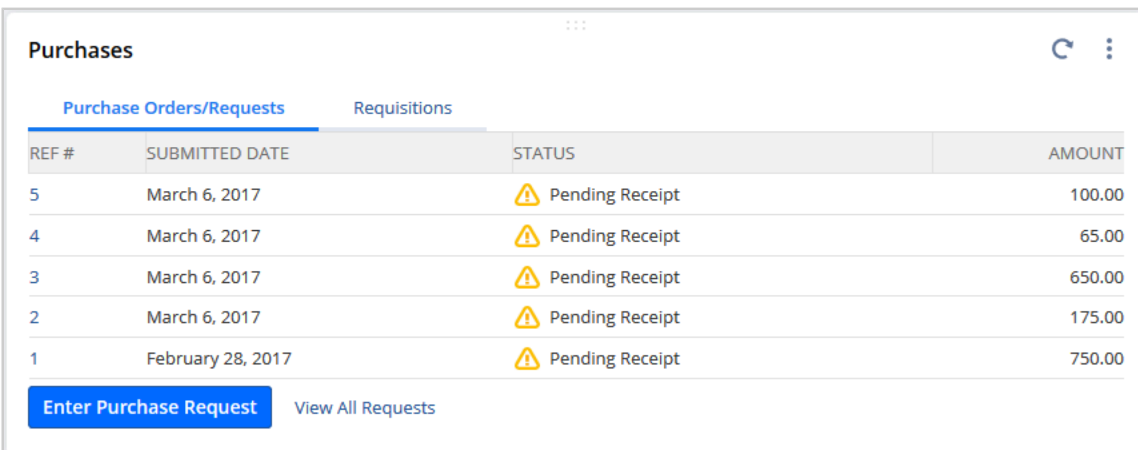
You can enter purchase requests and requisitions and check the status of your requests in the Employee Center. If you are a manager, you can also approve or reject purchase requests and requisitions. A supervisor can also enter and edit requisitions on behalf of their subordinates.

Entering a Purchase Request or a Requisition

Use the Purchases portlet to view your purchase requests and requisitions. You can also enter new purchase requests and requisitions, depending on the features that your company has enabled.

A **purchase request** is a document detailing required items, the number required, and when they are required. After it is approved it becomes a purchase order. A purchase request is an unapproved purchase order.

A **purchase requisition** form is a document used by a department to request that the purchasing department order materials or merchandise. This form is used by departments to notify the purchasing department that raw materials are needed for production. It is also used to notify the purchasing department that merchandise is needed for the sales floor.


Purchases

Purchase Orders/Requests | Requisitions

REF #	SUBMITTED DATE	STATUS	AMOUNT
5	March 6, 2017	Pending Receipt	100.00
4	March 6, 2017	Pending Receipt	65.00
3	March 6, 2017	Pending Receipt	650.00
2	March 6, 2017	Pending Receipt	175.00
1	February 28, 2017	Pending Receipt	750.00

Enter Purchase Request | View All Requests

To enter a purchase request:

1. On the Purchases portlet, click **Enter Purchase Request**.
2. On the Purchase Request page, in the **Primary Information** section:
   a. Select the vendor.

      Your name is displayed the Employee field.
   b. Enter or select a date you expect to receive this order in the **Receive By** field.
   c. If you wish, enter a memo.
3. In the **Classification** section, if appropriate:
   a. Select the **Department**.
   b. Select the **Class**.

   c. Select the **Location**.

      The Currency field is entered automatically.

4. On the **Items** subtab, for each item:
   a. Select the item from the dropdown list. The **Description** and other fields are automatically entered.
   b. Adjust the **Quantity**, if necessary.
   c. If the item is going to be resold, select the customer or project in the Customer field.
   d. Check the **Billable** box if this item is billable to a customer.
   e. When you complete entering information about an item, click **Add**.
   f. Repeat these steps for each item you want to order.
5. On the **Billing** subtab, verify that the billing address is correct, or click the Edit icon to modify an existing address.
6. On the **Relationships** subtab, you can enter contact information.
7. On the **Communications** subtab, tab you can add a vendor message and you can choose to print the order, send it by E-mail, and or by Fax.
8. When you complete the Purchase Request, click **Save**.

   You can make edits to purchase requests as long your supervisor or approver has not yet approved it. For details, see Editing a Purchase Request or a Requisition

To enter a requisition

1. On the Purchases portlet, click **Enter Requisition**.
2. In the **Primary Information** section, fill in the following fields, if necessary:
   - In the **Custom Form** field, choose the Standard Requisition form or select a custom form you have already created. Click New to customize a requisition form. Depending on your company and your settings, this field might not appear.
   - In the **Req #** field, NetSuite increases the largest requisition number by one. If you wish, you can enter another number. The next requisition number will revert to the standard pattern. The maximum number of character that you can enter in this field is 45. Depending on your company and your settings, this field might not appear.
   - In the **Requestor** field, select the employee or user making the request. This may also be a company representative, such as a consultant.
   - In the **Receive By** field, enter the date by which you need to receive the requested items.
   - Enter a date for this requisition. The current date shows by default.
   - In the **Memo** field, enter a memo to identify this purchase order.
3. In the Classification section, do the following:
   - If your company tracks departmental requisitions, in the **Department** dropdown list, select a department.
   - If your company tracks classes for requisitions, in the **Classes** dropdown list, select a class. For OneWorld accounts, you can select a department or class from the requestor's subsidiary.
   - If you track locations, in the **Location** dropdown list, choose a location for this order. For OneWorld accounts, you can select a location from the requestor's subsidiary.
   - If you use multiple currencies, to change the exchange rate for the order, enter a rate in the **Exchange Rate** field. The requestor's currency appears in the **Currency** field. All currency amounts on this transaction are shown in this currency. You can change the exchange rate for

this transaction only, or you can update the currency record with the exchange rate you enter here.

4. Click the **Items** subtab, and enter the following information:
    a. In the **Item** column, select an item from the dropdown list.
    b. Optionally, select a vendor for the item. You can leave this field blank initially, but a vendor must be selected before the requisition can be further processed for purchasing.
    c. In the **Quantity** column, enter the quantity for this item.
    d. Enter an **Estimated Rate** for the item. Note that this rate can be changed before a purchase order is created if you are not certain of the rate to be charged for the item. An estimated rate or amount must be entered on each line for approval purposes.

       When you enter an estimated rate, the estimated amount for the line autofills in the **Estimated Amount** column.
    e. If there is a purchase price assigned to the item, it is displayed in the **Rate** column as a reference for the buyer.
    f. Set any options for this item.
    g. Select a department or class if you track them.
    h. If this item is for a particular customer, select that customer in the **Customer** column.
    i. If you want the cost of this item billed back to the chosen customer, check the **Billable** box.
    j. Click **Add**.
    k. Repeat these steps for each item you want to add.
5. If you allow expenses on requisitions, click the **Expenses** subtab, and then do the following:
    a. Select a category for the expense.
    b. In the **Account** column, select an account for this expense.
    c. Optionally, select a vendor for the expense. You can leave this field blank initially, but a vendor must be selected before the requisition can be further processed for purchasing.
    d. Enter an **Estimated Amount** for the expense. This amount can be changed before a purchase order is created if you are not certain of the amount to be charged for the expense. An estimated amount must be entered on each line for approval purposes.
    e. The **Amount** column will be filled in after the purchase order is placed and will represent the actual purchase order amount.
    f. Optionally, enter a memo for this expense line.
    g. Select a department, class, or location if you track them.
    h. If this expense is for a particular customer, select that customer in the **Customer** column.
    i. If you want this expense billed back to the chosen customer, check the **Billable** box.
    j. Click **Add**.
    k. Repeat these steps for each expense you want to add.
6. Click the **Communications** tab, and, if applicable, do any of the following:
    - Use the **Events**, **Tasks**, and **Phone Calls** subtabs to attach activities to this transaction.
    - On the **Files** subtab, select and attach files from the File Cabinet related to this transaction. For example, you can attach files and notes related to this requisition to specify quality or technical requirements.

      Select **New** to upload a new file to File Cabinet.
    - On the **User Notes** subtab, you can enter a title and note for any comments you want to add to this transaction. Click **Add** after each note.

7. When all information on the form is complete, click **Save**.

> **Note:** If your company uses approval routing, the requisition must go through the approval process before a linked purchase order can be created.

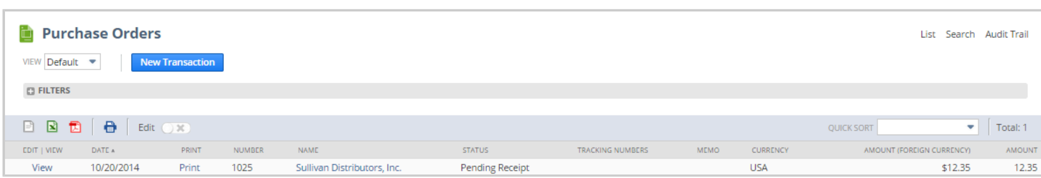
Viewing the Status of a Purchase Request or a Requisition

You can view the status of your five most recent purchase requests and requisitions in the Purchases portlet. To view the status of other purchase requests or requisitions, in the menu of the Purchases portlet, click **View Purchase Requests/Orders** or **View Requisitions**. On the Purchase Orders or Requisitions page, locate the appropriate request in the list, and look in the Status column.

To view the status of a purchase request:

1. On the Purchases portlet, click the **Purchase Orders/Requests** tab.
2. Click **View All Requests**.
3. On the Purchase Orders page, locate the appropriate purchase order in the list and look in the **Status** column.

   > **Tip:** If there is a long list on the Purchase Orders page, use Filters to narrow the results.



4. Look in the **Status** column.

The status of a purchase request depends on whether the Advanced Receiving feature is enabled.

If Advanced Receiving is enabled, the possible statuses of purchase requests are:

- **Pending Supervisor Approval:** The request has not been approved by a supervisor or approver with a high enough approval limit.
- **Pending Receipt:** The request has been approved and none or part of the order has been received or billed.
- **Fully Billed:** The entire order has been received and billed.
- **Rejected by Supervisor:** The request has been rejected by a supervisor or approver.

If Advanced Receiving is not enabled, the possible statuses of purchase requests are:

- **Pending Supervisor Approval:** The request has not been approved or by a supervisor or approver with a high enough approval limit.
- **Open:** The request has been approved and none of the order has been received or billed.
- **Received In Full:** The order has been received and billed.
- **Rejected by Supervisor:** The request has been rejected by a supervisor or approver.

To view the status of a requisition:

1. On the Purchases portlet, click the **Requisitions** tab.
2. Click **View All Requests**.
3. To view the status, on the Requisitions page, look in the **Status** column.

The status of a requisition depends on whether your company requires a supervisor or approver to approve the requisition. If approval is required, the possible statuses of requisitions are:

- **Pending Approval:** The requisition is in the approval queue.
- **Approved:** The requisition has been given approval for processing.
- **Rejected:** The requisition has not been approved and will not be processed.

If the requisition has been approved, or if approval is not required, the possible statuses of requisitions are:

- **Pending Order:** The requisition has not been ordered yet.
- **Partially Ordered:** Some items on the requisition have been ordered.
- **Fully Ordered:** The items on the requisition have all been ordered.

Editing or Deleting a Purchase Request or Requisition

Editing a Purchase Request or a Requisition

You can edit a purchase request or a requisition that you have submitted as long as your supervisor or approver has not yet approved it.

To edit a purchase request:

1. On the Purchases portlet, click the **Purchase Orders/Requests** tab.
2. Click **View All Requests**.
3. Beside the purchase request that you want to edit, click the **View** link.
4. On the Purchase Request page, click **Edit**.
5. Make the required changes, and then click **Save**.

To edit a requisition:

1. On the Purchases portlet, click the **Requisitions** tab.
2. Click **View All Requests**.
3. On the Requisitions page, beside the purchase requisition that you want to edit, click **Edit**.
4. Make the required changes, and then click **Save**.

Deleting a Purchase Request or a Requisition

You can delete a purchase request that you have submitted as long as your supervisor or approver has not yet approved it.

To delete a purchase request:

1. On the Purchases portlet, click the **Purchase Orders/Requests** tab.
2. Click **View All Requests**.
3. Click the **View** link beside the purchase request you want to delete.
4. On the Purchase Request page, click **Edit**.
5. Click Actions > Delete.

To delete a requisition:

1. On the Purchases portlet, click the **Requisitions** tab.
2. Click **View All Requests**.
3. On the Requisitions page, beside the requisition that you want to delete, click **Edit**.
4. Click Actions > Delete.

Approving or Rejecting a Purchase Request or a Requisition

If you are a supervisor and your direct reports submit purchase requests or requisitions, you can use the Reminders portlet to approve or deny the requests.

> **Note:** Depending on how your company has set up requisitions in NetSuite, supervisors might not be required to approve requisitions. For more information, talk to your NetSuite administrator.

To approve a purchase request:

1. In the Reminders portlet, click **Purchase Requests to Approve**.
2. Check the box next to the purchase requests that you want to approve.
3. Click **Save**.

To reject a purchase request:

1. In the Reminders portlet, click **Purchase Requests to Approve**.
2. In the list of purchase requests, click the date beside the request that you want to reject.
3. Click **Reject**.
4. On the Purchase Request Rejection Notice page, enter a message explaining why you rejected the request, and then click **Save**.

   An email message is sent to the employee who submitted the purchase request.

To approve a requisition:

1. In the Reminders portlet, click **Requisitions to Approve**.
2. Check the box next to the requisitions that you want to approve.
3. Click **Submit**.

To reject a requisition:

1. In the Reminders portlet, click **Requisitions to Approve**.
2. In the list of requisitions, click the date beside the requisition that you want to reject.
3. Click **Reject**.
4. On the Requisition Rejection Notice page, enter a message explaining why you rejected the requisition, and then click **Save**.

   An email message is sent to the employee who submitted the requisition.

Approving Vendor Bills

You can use the Reminders portlet to review the vendor bills waiting for your approval, and to access the Approve Bill pages where you can approve bills.

> **Tip:** If you do not see the Reminders portlet on your dashboard, add the portlet using the procedure in Setting Up Reminders.

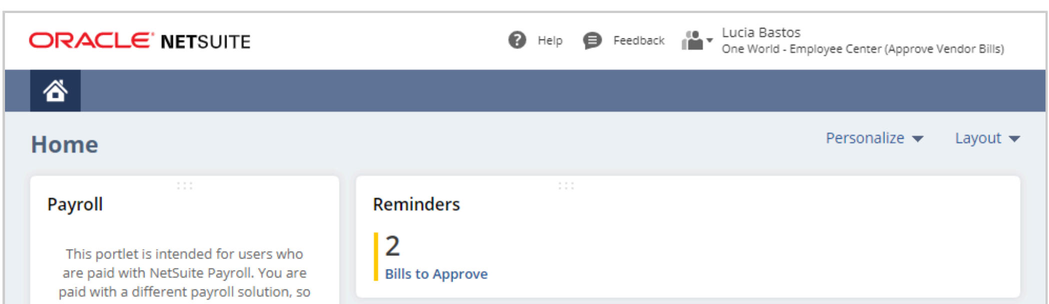
Approving Vendor Bills using Standard Approval

Depending on how your company has set up approvals in NetSuite, you can review and approve vendor bills using the standard vendor bill approval process or a vendor bill approval workflow in SuiteFlow.

When you use the standard vendor bill approval, you only have the option to select one or more bills for approval.

To approve vendor bills using standard approval:

1. Log in to the NetSuite Employee Center.
2. In the **Reminders** portlet, click the **Bills to Approve** link.



> **Note:** This Bills to Approve reminder is only available when your administrator configures the required permissions in the Employee Center role.

3. Optionally, click on the date of a bill to open the bill details.
4. In the **Approve Bills** page, select the bills that you want to approve.
5. Click the **Submit** button to approve the selected bills.

> **Note:** After a vendor bill is approved, you cannot cancel or change the status of that bill.

If the Reminders Portlet Does Not Show the Expected Information

If the Reminders portlet does not show any information or the expected number of bills, review the following:

- In the Reminders portlet, click the Refresh button to update the information.
- Verify with your administrator that your Employee Center role has the required permissions for bill approvals.
- Verify that the bills are not in a locked or closed account period.
- If you are using a NetSuite OneWorld account, verify that the bills pending approval belong to your subsidiary.
- Ensure that you are the approver, or the next approver in the approval workflow.

Approving Vendor Prepayments

You can access and approve vendor prepayments pending your approval by reviewing the Vendor Prepayments to Approve reminder in the Reminders portlet.

> **Note:** The Vendor Prepayments to Approve reminder is only available when your administrator configures the required permissions for the Employee Center role.

> **Tip:** If you do not see the Reminders portlet on your dashboard, add the portlet using the procedure in Setting Up Reminders.

To approve vendor prepayments:

1. Log in to the NetSuite Employee Center.
2. In the **Reminders** portlet, click **Vendor Prepayments to Approve**.
3. In the **Approve Vendor Prepayment** page, select the prepayments you want to approve.

   > **Note:** To select all prepayments at once, click **Mark All**.

4. (Optional) Click on the date of a prepayment to open the full record of the prepayment.
5. Click **Submit** to approve the selected prepayments.

   > **Note:** After a vendor bill is approved, you cannot cancel or change the status of that prepayment.

If the Reminders Portlet Does Not Show the Expected Information

If the Reminders portlet does not show any information or the expected number of bills, review the following:

- In the Reminders portlet, click the Refresh button to update the information.

- Verify with your administrator that your Employee Center role has the required permissions for vendor prepayment approvals.
- Verify that the vendor prepayments are not in a locked or closed accounting period.
- If you are using a NetSuite OneWorld account, verify that the vendor prepayments pending approval belong to your subsidiary.

Tasks

A task record contains details about an action that needs to be performed by assigned personnel. Tasks can be independent or be one of several tasks that are part of a project.

Create a task record and assign it to yourself as a reminder. An assigned task shows on your list of tasks until it is marked Completed.

Task Lists

To view your task list, on the **Employee Center – Home Links** portlet, under **Activities**, click **Tasks**.

The task list shows the due date, title, company, priority and status of each task. You can use the options in the footer of the list to filter the results shown in the list. You can also choose to print or export the list.

> **Note:** The options available in the footer may vary depending on the permissions granted to your Employee Center role.

Entering New Tasks

Create a new task record to track an activity that needs to be completed. Task records can either be independent or associated with projects or customers.

To create a new task:

1. Open a new task record by doing one of the following:
   - On the **Tasks** page, click **New**.
   - Click **Task** in the **Create New** bar at the top of most pages.
2. Enter the title for this task.

   This title should be as descriptive of the task as possible.
3. In the **Assigned To** field, select the employee this task is assigned to.

   Your name appears in this field by default.
4. Check the **Send Email** box to email a notification to the person the task is assigned to.

   This email informs the person that a task has been created or edited and assigned to him or her.

   If this person's record does not include an email address, no message will be sent.
5. Set the start date for this task.
6. Check the **Reserve Time** box to schedule this task on the calendar.

   If you want tasks that reserve time on your calendar, check the **Display Non-blocking Tasks in Calendar** box at Activities > Scheduling > Calendar > Calendar Preferences.

7. If this is a scheduled task, enter the start and end times in the **From** and **To** fields.

   You can use the **Availability** subtab to view when the person assigned to this task is available.
8. In the **Due Date** field, enter the date when this task should be completed.
9. If you are updating this task, enter the actual date completed in the **Date Completed** field.
10. In the **Insert Before** field, select a task from the list that the new task should be placed above.
11. Select the priority and status for this task.

    When the status changes, someone with permission to edit the record can change the status.
12. In the **Notes** field, enter notes or a description about this task.

    These comments appear in the email message sent to the person this task is assigned to.
13. Check the **Private Task** box if you want only you or the person in the **Assigned To** field to see this task.
14. If this is a scheduled task, check the **Reserve Time** box and select the type of reminder you want to set:
    - **None:** No reminder is triggered.
    - **Email:** An email reminder is sent to the email address on the employee record for the person selected in the Assigned To field.
    - **Browser:** A popup reminder opens when the person assigned to this task is logged in to NetSuite.

    You must also select a reminder start time to set the reminder. This person assigned to this task can edit the task record to change the reminder setting.
15. In the **Reminder** field, enter the time increment before the time set in the From field that a reminder should be triggered.

    You must also select a reminder type in order to set the reminder.

To complete the Related Records subtab:

1. If this task is related to a customer, vendor, or partner, select a company.
2. The Contact field lists the contacts for the company you have selected. In the **Contact** field, select the contact this task is associated with.
3. If this task pertains to a support case, select the case number in the **Support Case** field.
4. If this task is related to a transaction, select the transaction number.
5. If you use the Project Management feature, select a milestone to associate with this task. For more information, switch to another role, and in the Help Center, search for Projects and Milestone Billing.
6. Select and add multiple companies and contacts associated with this task on the **Companies and Contacts** sublist.

   For example, the contact who requested the task or requires reporting on this task can appear on the **Related Info** subtab. Other companies affected or involved with the task can be added here on the **Companies and Contacts** sublist.

Time Tracking subtab

If you have enabled either the Time Tracking for CRM or Project Management feature, you can track time for this task.

Once you have entered information on these subtabs, click **Save**.

This task now appears in the Tasks list.

You can change or update information for existing tasks by clicking **Edit** next to a task from the tasks list.

As you work on your tasks or complete them, update the status of the tasks. If the tasks are not marked private, others can see your progress and know what you are working on. This facilitates communication between departments within your company.

Project Tasks

A project task record contains details about an action to be performed for a project.

You can view tasks in the Employee Center only if you have View access to project tasks, and Project Management (formerly called Advanced Projects) is enabled in your account.

To view your list of project tasks, use the Project Tasks portlet on the dashboard to manage projects tasks. If the portlet is not visible on your dashboard, see Customizing the Dashboard for instructions on adding a portlet.

> **Note:** If the Project Management feature is not enabled in your account, you will see an error message if you add the Project Tasks portlet to your dashboard.

The Project Task portlet can be filtered by Assignee and Status, and you can switch views between a Dashboard view and a Project Tasks view. The list shows the project, start date, end date, priority, status, and other details for each project task.

> **Note:** The options available may vary depending on the permissions granted to your Employee Center role.

You cannot add new project tasks from the Employee Center.

Calendar

Viewing Your Calendar

Your Calendar page includes a monthly calendar on the left and a list of calendar events on the right. You can view your calendar by day, week, or month. What you select in the Default View field on the Calendar Preferences page is how your calendar initially appears.

To browse your calendar, choose from the following options:

- On the left side of the page, click **Day**, **Week**, or **Month** to view the events scheduled for the time you choose.
- On the left side of the page, click the date in the calendar to view the events for the day, week, or month.
- On the left side of the page, click the arrows at the top of the smaller monthly calendar to view your events for the previous or next month.
- On the left side of the page, under the name of the month, click **Today** to view today's events.
- In the center of the page, click an event to view the event's record.
- In the center of the page, in the daily view, click a time to create an event beginning at that time.

- On the right side of the page, click the name of a task to view the task record.
- At the bottom of the page, click **New Event** to create a new event
- At the bottom of the page, click **New Task** to create a new task.
- At the bottom of the page, click **New Phone Call** to create a new phone call.
- At the bottom of the page, click **Print** to print the events listed in the center of the page.
- At the top of the page, click **List** to view, edit, or create events.

Icons show the status of your events. Color icons show your response to the events on your calendar. Green circles show events you have accepted, orange circles show events you have marked as tentative, and white circles show events you have not yet responded to. If you decline an event, it will not appear on your calendar. Other icons appear if an event has a reminder or is recurring.

> **Note:** To create a new calendar, from your dashboard click **Personalize Dashboard** and then click **Setup Calendar**.

Responding to Events

To respond to an event from the Calendar portlet:

1. In the calendar portlet, hover over the event to display the event popup.
2. Click one of the following buttons on the event popup:
   - **Quick Accept** — Accept the event without responding to the event organizer or setting a reminder.
   - **Accept** — Agree to go to the event. With this option you have the option to send an email response to the event organizer.
   - **Tentative** — Wait to respond to this event.
   - **Decline** — Defer from going to this event. With this option you also have the option to send an email response to the event organizer.
   - **Decline This Date** — Decline only this occurrence of a recurring event.

If you choose not to send an email when you respond to the event invitation, the event organizer can still see the status for each invitee on the event record. People with permission to see the event's record can also see the status of those invited.

Scheduling an Event

To create a new event record:

1. In the Calendar portlet, click on a specific day or time, and then click **Event**.
2. When the Event page opens, enter the subject or title of this event.
3. If you use a custom form for events, select that form in the **Custom Form** field. Select **New** to create a custom form for events.
4. If you use the Opportunities feature, select the opportunity this event is associated with.
5. Enter the location and date of this event.
6. If this event will last the entire day, check the **All day event** box.

If you check this box, the start and end times fill in automatically.

7. Check the **Reserve Time** box if you want to reserve time on your calendar for this event.

   Events that do not reserve time appear first on your calendar on the day they are scheduled. These can include events such as birthdays or anniversaries.

8. In the **Start Time** and **End Time** fields, accept, enter, or select the time this event will begin and end.

9. In the **Reminder Type** field, select the type of reminder you want to receive.

   Browser reminders pop up in a window at the designated time if you are logged into your NetSuite account.

   Email reminders are sent to the email address on your employee record.

   If you select **None**, you will not receive a reminder.

10. If you want to set a reminder, select the amount of time before the event that you want to be reminded.

    If you select **None**, you will not receive a reminder.

    Others invited to the event can set their own reminders when they accept or tentatively accept the event invitation.

    To receive your reminder at the correct time, make sure the clock on your computer is set to your time zone, and go to Home > Set Preferences to set the same time zone for NetSuite.

11. Select whether the status of the event is **Confirmed**, **Tentative**, or **Canceled**.

12. In the **Event Access** field, select how you want this event to appear to others who have access to this calendar.

    - **Public:** This event and its information appear to everyone with access to the calendar.
    - **Private:** This event appears only to you on the calendar.
    - **Show as Busy:** This event appears as a busy time slot to everyone with access to the calendar.

13. Enter a message in the **Message** field.

    If you choose to send email to your attendees, this message shows in the email invitation.

14. If desired, invite other people.

    The availability of those individuals and materials you have selected on the **Attendees** or **Resources** subtabs appears on the Availability subtab. Click the arrows next to the date to view the availability on other days. The window of time shown on this subtab is the same as the start and end times of your calendar. To change your calendar start and end times, go to Activities > Setup > Calendar Preference, then click the **Preferences** subtab.

15. Set event recurrence on the **Recurrence** tab.

16. On the **Related Records** subtab:

    a. Select a company if this task is related to a customer, vendor, or partner.
    b. The **Contact** field lists the contacts for the company you have selected. In the **Contact** field, select the contact this task is associated with.
    c. If this task pertains to a support case, select the case number in the **Support Case** field.
    d. If this task is related to a transaction, select the transaction number.

17. Reserve the necessary resources for this event such as a conference room or presentation materials.

18. If you track time, enter the time related to this event on the **Time Tracking** subtab.

19. On the **Communication** subtab, you can attach files or add notes concerning this event.

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

Contacts

To see your contacts and enter new contacts:

1. On the **Employee Center — Home Links** portlet, under **Relationships**, click **Contacts**.

   Your list of contacts appears.

   - To view a contact's record, click a contact's name.
   - To change a contact's record, click **Edit** next to a contact's name.
   - To enter a new contact, at the top of the page, click **New Contact**.
2. You can choose to export the list in CSV, PDF, or Microsoft Excel format.

Phone Calls

You can document the phone calls you make and receive in NetSuite with phone call records.

You can use phone call records to schedule calls and list them in order of the due date and priority. Or, you may simply use phone calls to document customer feedback whenever a customer calls you. All information is stored on a record in the Phone Call list, on the customer record who calls, and on the contact's record who called for the customer.

Phone Calls List

To view your list of phone calls:

On the **Employee Center – Home Links** portlet, under **Activities**, click **Phone Calls**.

The Phone Calls list shows the Subject, Date, Phone Number, Priority, Status and more for each phone call.

Scheduling or Logging Phone Calls

To schedule or log a phone call:

1. On the **Employee Center – Home Links** portlet, under **Activities**, click **Phone Calls**.
2. Click **New Phone Call**.
3. If you have created a custom form you want to use for this record, select that form in the **Custom Form** field.

   Click **Customize Form** to create a new custom form.
4. In the **Subject** field, enter the main subject of the discussion.
5. In the **Organizer** field, select who is responsible for making the call.

   Your name fills here by default.
6. In the **Date** field, enter the date the call is scheduled for.
7. Check the **Reserve Time** box to schedule this phone call on the calendar.

   If you want phone calls that reserve time on your calendar, check the **Display Non-blocking Phone Calls in Calendar** box at Activities > Scheduling > Calendar > Calendar Preferences.
8. If you are scheduling this call, select the start and end times in the **From** and **To** fields.

You can use the Availability subtab to see when the organizer (you) and all added participants with NetSuite records are available.

9. In the **Date Completed** field, enter the actual date this call was completed if different from the scheduled date.
10. In the **Phone Number** field, you can enter the number dialed to make this call if it is different from the number of the participant(s) selected below.
11. In the **Status** field, select whether this phone call is Scheduled or Completed.
12. Check the **Private Call** box to only display this call in your list of calls.
13. If this is a scheduled call, select the type of reminder you want to receive:
    - **None:** No reminder is triggered.
    - **Email:** An email reminder is sent to the email address on the employee record for the person selected in the Organizer field.
    - **Browser:** A popup reminder opens when the organizer is logged in to NetSuite.

    You must also select a reminder time to set the reminder.
14. In the **Reminder** field, enter the time increment before the time set in the **From** field that a reminder should be triggered.

    You must also select a reminder type in order to set the reminder.
15. On the **Message** tab, enter notes or a description of the content of the phone call.
16. On the **Related Records** tab, select a company if this call is related to a customer, vendor or partner.

    The Contact field lists the contacts for the company you have selected.
17. In the **Contact** field, select the contact this call is associated with.
18. If this call pertains to a support case, select the case number in the **Support Case** field.
19. If this call is related to a transaction, select the transaction number.
20. In the **Company** and **Contacts** tab, select and add each company and contact on this call.
21. On the **Communication** tab, attach files relating to this call on the **Files** subtab.
22. Click **Save**.

Your phone call is now documented. If the phone call was set as completed when it was created, it remains in the tasks list until it is marked Completed.

To mark a phone call Completed, go to the Phone Calls page, and click **Completed** next to the phone call that has already been placed.

File Cabinet

With your file cabinet, you can store and organize your business documents online and then associate them with company, customer, contact, vendor, other name, partner, task, event, and case records.

First, you upload documents and images to folders in your file cabinet. Then, you can attach them to your records. When you log in, you can view the files you want to see with the appropriate records.

Files of all types can be stored in the file cabinet, as file types are remembered even when they are not recognized. When you retrieve your file, NetSuite remembers the file type, and you can open it using the appropriate program.

To view your file cabinet, on the Employee Center – Home Links portlet, under Documents, click **File Cabinet**.

To attach a file cabinet file to a record, open the record, and click the **Files** subtab. Select the file you want to attach, and click **Add**.

Creating File Cabinet Folders

To set up your file cabinet, you first need to create folders in which you store your documents and images.

If you use the Web Store feature or the Marketing Automation feature, a folder already exists where you can store your items for these purposes.

To create a folder:

1. On the **Employee Center – Home Links** portlet, under **Documents**, click **File Cabinet**.
2. On the File Cabinet page, click **New Folder**.
3. In the **Folder Name** field, enter a name for this folder.

   You will select this name when you attach documents and images to records.
4. In the **Subfolder of** field, select this folder's parent folder if one exists. Only administrators can create folders at the root of the file cabinet; therefore, this field cannot be empty.
5. In the **Description** field, enter a brief message describing what you store in this folder.
6. If you use classes and you want to restrict this folder by class, select the class in the **Restrict by Class** field.
7. If you use departments and you want to restrict this folder by department, select the department in the **Restrict by Department** field.
8. If you use locations and you want to restrict this folder by location, select the department in the **Restrict by Location** field.
9. If you use groups and you want only members of a group to use this folder, select the group in the **Restrict by Group** field.
10. If you want to make this a private folder, check the **Private** box.
11. If you want to make the folder inactive so the folder does not show in lists, check the **Inactive** box.
12. When you are finished, click **Save**.

Your folder is now available in your file cabinet.

Uploading Files

The file cabinet accepts documents of all types, although NetSuite does not recognize some file types. NetSuite memorizes file types for each file as they are uploaded to the file cabinet, and then restores type when you retrieve the file.

If you upload files of unrecognized type in ZIP files, NetSuite cannot determine the file type. If specific files are not being recognized, upload them individually.

> **Note:** Employee expense file attachments may automatically save to a dedicated employee expenses folder, predefined by the system. Employees cannot locate or access these attachments from the File Cabinet. Employees must instead access their expense attachments from the expense report record.

To attach documents and images to a folder:

1. On the **Employee Center – Home Links** portlet, under **Documents**, click **File Cabinet**.
2. On the File Cabinet page, click the name of the folder where you want to store documents or images.
3. Click **Add File** to select a file from your computer or click **Advanced Add** to add a file from the internet or to add multiple files.

   When you add multiple files in a ZIP archive, you can chose to have each file automatically available externally. Files available externally are available for viewing in your website and in the Customer, Vendor, or Partner Centers should you publish information that references the files.

   > **Note:** All files added to the Images folder or the Web Site Hosting Files folder are automatically available externally. This prevents broken images and links in your website.

4. In the **Browse** window, select your file and click **Open**.
5. Repeat these steps to attach other media items or files to this folder.

After you upload documents and images to your file cabinet, you can attach them to the **Files** subtab on records.

Deleting File Cabinet Files

You can delete files to help organize and clean your file cabinet.

To delete files:

1. On the **Employee Center – Home Links** portlet, under **Documents**, click **File Cabinet**.
2. Navigate to the folder that contains the files you want to delete.
3. Click **Delete Files**.
4. Check the box next to each file you want to delete.
5. Click **Delete**.
6. When prompted, click **OK** to confirm.

> **Note:** You cannot delete files that are referenced by other records in NetSuite. Alternatively, you can inactivate files you no longer use. See Inactivating File Cabinet Files for more information.

Inactivating File Cabinet Files

You can inactivate files that are referenced by other records in NetSuite. Inactivated files or folders will no longer appear on lists unless you check the Show Inactives box at the top of the File Cabinet page.

To inactivate files:

1. On the **Employee Center – Home Links** portlet, under **Documents**, click **File Cabinet**.
2. On the File Cabinet page, navigate to the folder that contains the files you want to inactivate.
3. Click **Edit** beside the file you want to inactivate.
4. Check the **Inactive** box. Check this box to inactivate this file.
5. Click **Save**.

Downloading File Cabinet Files

You can download individual files or entire file cabinet folders and their contents.

To download a file cabinet document:

1. On the **Employee Center – Home Links** portlet, under **Documents**, click **File Cabinet**.
2. Navigate to the folder that contains the file or folder.
3. Click **Download** next to the file or folder.

When you download a folder, all of the files and subfolders are downloaded in a ZIP file. The folder hierarchy is maintained in the downloaded file.

To download a file cabinet folder and its contents:

1. On the **Employee Center – Home Links** portlet, under **Documents**, click **File Cabinet**.
2. Navigate to the folder that you want to download.
3. Click **Download** next to the folder.

Moving and Copying File Cabinet Files

Moving files lets you quickly transfer specific files to different folders in your file cabinet.

To move file cabinet files:

1. On the **Employee Center – Home Links** portlet, under **Documents**, click **File Cabinet**.
2. Navigate to the folder that contains the files you want to move.
3. Click **Move Files**.
4. Check the box next to each file you want to move.
5. Expand the Filters section and in the **Move To** field, select the folder you wan to the files to.
6. When you are finished, click **Move**.

The selected files are now stored in the new folder and have been removed from the original location.

You can also copy files to other folders to easily store files in multiple folders.

To copy file cabinet files:

1. Navigate to the folder that contains the files you want to copy.
2. Click **Copy Files**.
3. Check the box next to each file you want to copy.
4. Expand the Filters section and in the **Copy To** field, select the folder where you want to save copies of the files.
5. When you are finished, click **Copy**.

The selected files are now saved in both the original folder and the new folder.

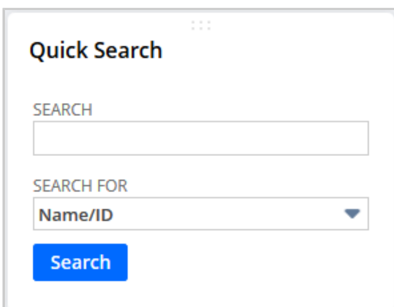
Search

Several different search options are available to help you find what you are looking for in the Employee Center:

- **The Quick Search portlet**. You can add a portlet to your dashboard, where you can enter keywords to return records with matching names or IDs. See Quick Search.
- **List searches**. You can click a **Search** link next to certain lists to search for records of that type. See Searching Lists.
- **Saved searches**. You can save a search definition that you and other users can run repeatedly for dynamically updated results. See Saved Searches.
- **Search results on your dashboard**. You can choose to add the Custom Search or Search Form portlet to your dashboard and show the results of a search in that portlet. See Search Results on Your Dashboard.

Quick Search

Use the Quick Search portlet on the Home page of your Employee Center. If the Quick Search portlet does not appear on the Home page, click **Personalize Dashboard** on the Home page. On the Standard Content list, click the **Quick Search Entry**. The search portlet appears on the dashboard.



To use the Quick Search portlet:

1. In the Quick Search portlet, in the **Search** field, enter the text that you want to search for.
2. In the **Search For** field, select the type of information you want to find.
3. Click **Search**.

For example, if you want to find a record of a phone call you placed to Johnson Electrics, you can enter **Johnson Electrics** and then select **Phone Call** in the **Search For** field.

A page opens with a list of your results. From here, you can do the following:

- To view a record or transaction, click the name or number
- To export the list, click **Export - CSV**, **Export - Microsoft® Excel**, or **Export - PDF**
- To go back to the Home page, click **Return to Criteria**.

Searching Lists

In the Employee Center, you can click a **Search** link next to the following lists to search for records of that type:

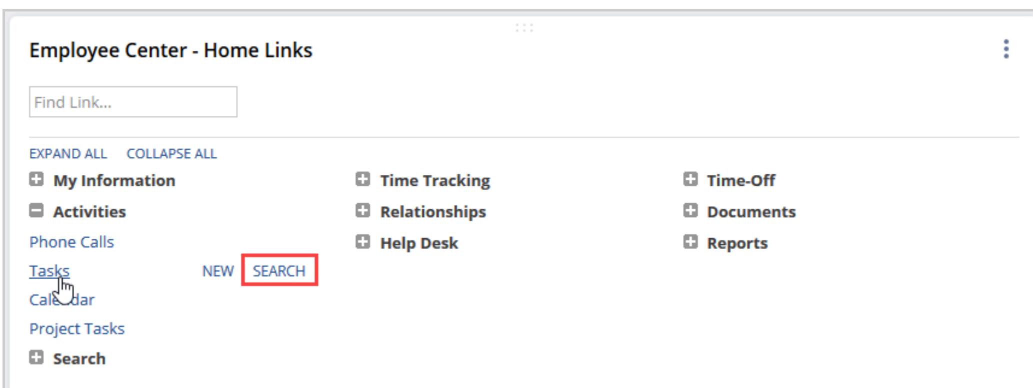
- Support Cases
- Contacts
- Events
- Time
- Tasks and Project Tasks
- Files
- Custom Records
- Phone Calls
- Saved Searches

To set criteria with a wider variety of filters, check the **Use Advanced Search** box. When you use advanced search, you can choose exactly how you want to display your results, including how the results are sorted, the order of the columns and even the fields that show when you drill down to a transaction from the results. You can also choose if you want to view the results as a report. Once you receive your results, you can export the list or report as a CSV file.

> **Note:** Searches with time-based criteria may return different results for people in different time zones.

To search using simple search:

1. In the **Employee Center – Home Links** portlet, hover over the record type that you want to search, and click **Search**.



2. By default, the search page is in simple search mode and criteria are first set to match all records.

   Use the following tips to narrow your search:

   - Select **any of** to include all of the criteria you select and **none of** to exclude all of the criteria you select.

     Press and hold the CTRL key to select multiple criteria.
   - For some number fields and text fields, such as the **Title** field, select **is**, **starts with**, or **contains** if you know all of part of the name or title. Similarly you can use **is not**, **does not start with**, and **does not contain**.
   - For some number fields, such as **Credit Limit**, select **any** if you do not know the number, **=** if you can enter the exact number, **<** if you want to search numbers less than what you enter, and **>** if you want to search numbers greater than what you enter.
   - In other number fields, select **any** if you do not want to include all of this type of number, or select **between** to search within numbers you enter in the From and To fields.

- For date fields, you can select **within** and a time period you want to search, such as last week, or you can select **not within** and a time period you want to exclude from the search. Or, you can search a specific date range by entering dates in the **From** and **To** fields.
- In some fields, you can select **-Unassigned-** to find records that are not tied to an employee, **-Mine-** to find only records associated with you, or **-Mine and Subordinates-** to find records associated with you or your subordinates.
- When entering text, use **%** to match any string of characters and _ to match any single character. For example, if you search for **"aa%r fra%i"**, your results will include Aaron Frankenstein and Frangelica Aardvark.

3. Click **Submit** to submit the criteria and view your results.

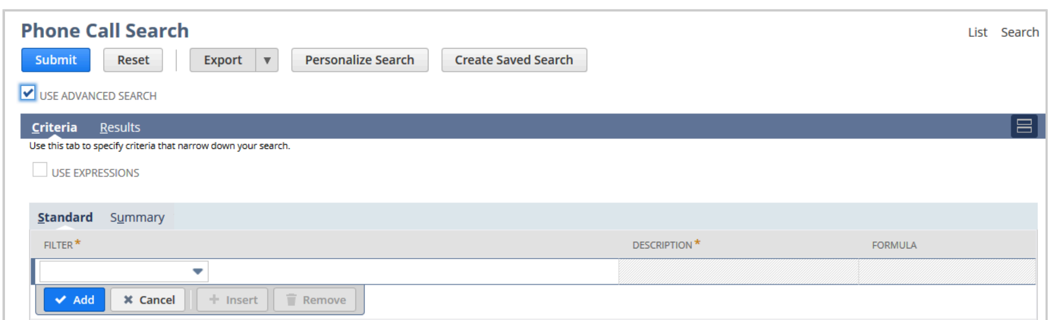
You can now view the list of results. Click **Edit** or **View** next to a record name to view the record or make changes to the record. Click **Save This Search** to save your criteria. You can then go to **Saved Searches** to search with the same criteria repeatedly and get updated results.

To export search results, you can click **Export** after you have entered your search criteria, or you can click **Submit** to view your results before clicking **Export**. Depending on your browser, when you click **Export**, a window may appear where you can choose to open the CSV file or save it to your desktop.

To search using advanced search:

1. In the **Employee Center – Home Links** portlet, hover over the record type that you want to search, and click **Search**.
2. Check the **Use Advanced Search** box.

   The page refreshes with two subtabs: **Criteria** and **Results**.



3. On the **Criteria** subtab, in the **Filter** column, select the field that you want to enter criteria for.

   For example, if you want to search for transactions that include a certain item, select Item.
4. In the window that pops up, set criteria for that filter.

   For example, if you select **Phone Number** as your filter, in the popup window, select **starts with**, enter the area code, and click **Set**. Use the following tips when selecting criteria:

   - Select **any of** to include all of the criteria you select and **none of** to exclude all of the criteria you select.

     Press and hold the CTRL key to select multiple criteria.
   - For some number fields and text fields, such as the **Title** field, select **is**, **starts with**, or **contains** if you know all of part of the name or title.
   - For some number fields, such as **Credit Limit**, select **any** if you do not know the number, **=** if you can enter the exact number, **<** if you want to search numbers less than what you enter, and **>** if you want to search numbers greater than what you enter.

- In other number fields, select **any** if you do not want to include all of this type of number, or select **between** to search within numbers you enter in the **From** and **To** fields.
- For date fields, you can select **within** and a time period you want to search, such as last week, or you can select **not within** and a time period you want to exclude from the search. Or, you can search a specific date range by entering dates in the **From** and **To** fields.
- In some fields, you can select **-Unassigned-** to find records that are not tied to an employee, **-Mine-** to find only records associated with you, or **-Mine and Subordinates-** to find records associated with you or your subordinates.
- When entering text, use **%** to match any string of characters and _ to match any single character. For example, if you search for **"aa%r fra%i"**, your results will include Aaron Frankenstein and Frangelica Aardvark.

The criteria you set for the filter appears in the **Description** column.

5. Click the **Results** subtab.
6. Select the fields on transactions that you want to be displayed on the results list.

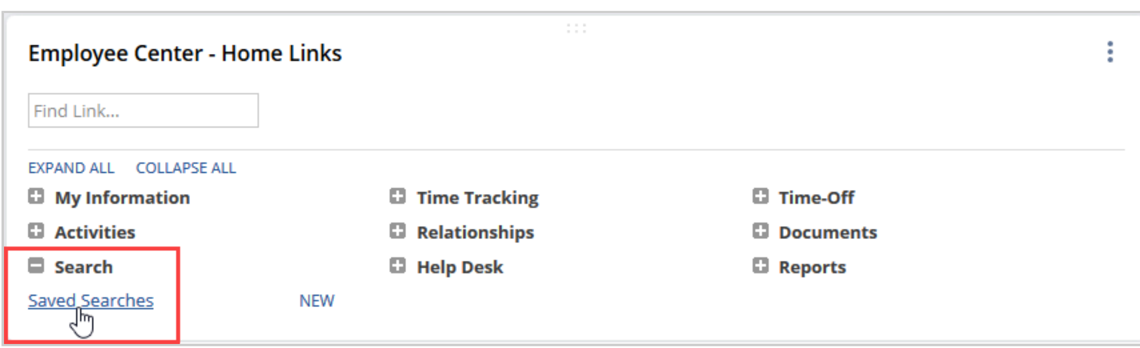
   You can click **Add Multiple** to quickly select several fields, or click **Remove All** to remove the fields currently listed and start over.
7. If you want to change the name of the field when it is displayed in results, enter a new label in the **Custom Label** field.
8. To add each field to the list, click **Add**.
9. Click **Submit**.

You can now view your customized list of results. From the Results list, you can click **Return to Criteria** to narrow or widen your search, or you can click **Save This Search** to save the criteria of this search and easily view results for this search repeatedly.

Saved Searches

If you save a search, you can come back to that search again to view updated results without having to re-enter the search criteria. To save a search, from the search results list, click **Save This Search**.

To access saved searches, in the **Employee Center – Home Links** portlet, under **Search**, click **Saved Searches**.



- To create a new saved search, click **New Saved Search**.
- To view a saved search, beside the search, click **View**.
- To edit a saved search, beside the search, click **Edit**.

After you open a saved search and view the results, you can do any of the following:

- To change criteria in any of the filters that were originally available and change the preferences for viewing the results, click **Edit this Search**. Click **Save** to save these changes.
- To open a print preview window and print the results, click **Print**.
- To export the results, click **Export - CSV**, **Export - Microsoft® Excel**, or **Export - PDF**.
- To send the search results to another recipient, click **Email**.

You can also create a custom reminder from a saved search. The reminder appears in the Reminders portlet on your home page. For more information, see Creating Custom Reminders from Saved Searches.

> **Note:** Searches with time-based criteria may return different results for people in different time zones.

Search Results on Your Dashboard

You can choose to add the **Custom Search** or **Search Form** portlet to your dashboard and show the results of a search in that portlet. These search results are updated every time the page loads. You can also click **Refresh** in the portlet to update the search results on demand.

When selecting a search to show in the portlet, you can choose a predefined search or any saved search available in your account. You can also select the number of results to show in the portlet and whether clicking a record opens that record in the current browser window in a new browser window.

Once the results are available in the portlet, you can choose to view or edit records. If you have **Inline Editing** enabled, you can edit information shown in the portlet without opening the record and the record is updated automatically. You can also use **Quick Add** to create a new record or add new information to a record, all from within the portlet.

To show search results on your dashboard:

1. At the top of the Home page, click **Personalize**.
2. Click Standard Content > Custom Search. The Custom Search portlet appears on the dashboard.
3. In the **Custom Search** portlet, click **Set Up**.
4. In the **Search** field, select the search results you want in the portlet.
5. Enter the number of search results you want shown in the portlet.
6. Choose to drill down on results on a new page by selecting **To New Page** or by opening the record in your current browser window by selecting **In Portlet**.
7. Click **Save**.

The results of your search now appear on your Dashboard.

Entering Help Desk Cases

You can create help desk cases for internal problems that you need help with from other employees, such as IT employees. Help desk cases that you create from the Employee Center create case records that are flagged as Help Desk.

Employees that are responsible for help desk cases can search or filter cases and respond to your questions and issues the same way a support representative would respond to a customer.

> **Important:** If you do not see the Help Desk link, then your company has not enabled the Help Desk feature, and you cannot enter help desk cases in NetSuite. For more information, contact your administrator.

To submit a help desk case:

1. On the **Employee Center – Home Links** portlet, under **Help Desk**, click **New** next to **See Support Cases**.
2. In the **Subject** field, enter a brief description of the problem.
3. Enter a phone number where you can reached.
4. If applicable, select the item and issue associated with the problem.

   Selecting an item and issue can help Help Desk employees search for and assign cases.
5. Select the type of case you are submitting to help employees route your case effectively.
6. In the **Message** field, enter descriptive details of your problem, question or request.
7. Click **Submit**.

Depending on your company's settings for support cases, you may receive email notification that your case has been submitted. When help desk employees receive and answer your case, they can email a copy of their response to you from the case record.

You can check on the status of help desk cases by clicking **See Support Cases** under the **Help Desk** heading. This lets you see the last message associated with a case and update the case with new details.

Campaign Subscription Center

To change your subscription status, click **Campaign Subscription Center** in the **Settings** portlet. On the Email Subscription Preferences page, you have the option to subscribe or unsubscribe to the commercial email sent out by this company.

In some cases, you can choose to subscribe to specific subscriptions. Check the box next to any subscription you would like to receive, and click **Submit**.

Employee Management

If you are a manager, you can approve time-off requests, expense reports, purchase requests, requisitions, and time entries from your direct reports in the Employee Center.

Depending on the features that your company uses, you might also have a Manager dashboard in your Employee Center. This dashboard contains portlets and information specific to your role as a manager, such as company news for managers, and information about your team members. If your company enables the Employee Change Requests feature, managers can create employee change requests for their direct reports and approvers can approve or decline requests in the Employee Center.

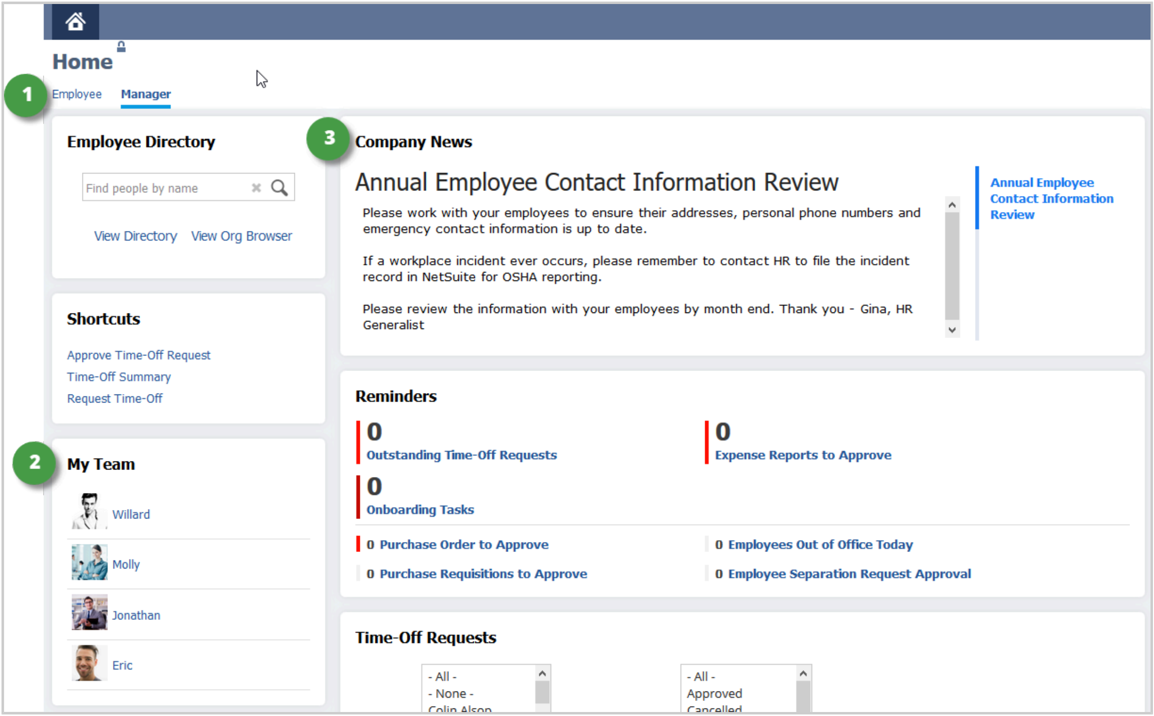
Learn more about managing employees with the Employee Center in these topics:

- Using the Manager Dashboard
- Employee Change Requests
- Viewing Employee Timelines
- Employee Goals
- Completing Performance Reviews as the Reviewer
- Approving or Rejecting Expense Reports
- Approving or Rejecting a Purchase Request or a Requisition
- Approving or Rejecting Time-Off Requests
- Approving Time Entries

Using the Manager Dashboard

If you have direct reports, the Manager dashboard might appear on your Employee Center home page. The Manager dashboard includes actions and news that specifically relate to your role as a manager.

To see the Manager dashboard, click the **Manager** button at the top of your home page. The Manager dashboard that you see might be customized for your company, but should include the following elements.



1	To switch to the Manager dashboard, click **Manager**. To switch to the Employee dashboard, click **Employee**.
2	The My Team portlet displays a list of your direct reports. Click a name to see more information about an employee (for example, the employee’s phone number, hire date, and more). If you are a manager, you can also view your direct reports’ employee timelines. The employee timeline displays an employee's key milestones and career changes in chronological order. For more information, see Viewing Employee Timelines. If your company enables the Employee Change Requests feature, managers can create employee change requests for their direct reports from the My Team portlet. For more information, see Employee Change Requests.
3	The Company News portlet in the Manager dashboard contains news items that are relevant to only managers. News items meant for everyone appear on the Employee dashboard.

Employee Change Requests

> **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.

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 which you can define in SuiteFlow. Approvers can approve or decline employee change requests, and approved requests are reflected in the employee's record on a proposed future date.

The Employee Center is the primary workspace for processing approvals. In the Employee Center, managers can create employee change requests on the Manager tab in the My Team portlet for their subordinates and have it go through an approval workflow set up by your company. After employee change requests are created, they can be approved or declined in the Employee Center through the Home Links portlet.

> **Note:** 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.

To learn more about Employee Change Requests, see the following topics:

- Creating an Employee Change Request
- Approving or Declining an Employee Change Request
- Viewing an Employee Change Request
- Employee Change Request Statuses

Creating an Employee Change Request

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.

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 you want to request a change for, and 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 **Reason** 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.

     > **Important:** If you are the final approver, you must have permission to make effective-dated changes to the employee's record before you can approve the request. If you do not have permission, contact your administrator.

   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.

Viewing an Employee Change Request

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

> **Note:** The Approvals subtab at the bottom of the employee change request shows who has 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. **Note:** If the request was declined because it requires a correction, create a new employee change request.
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.

Viewing Employee Timelines

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 the following information:

- 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

Managers 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 Goals

As a manager, there are several ways that you can interact with your direct reports' goals:

- Viewing the Goals of Your Direct Reports – You can view your direct reports' goals on the Goals page and the Goals portlet.
- Approving Goals – You need to approve goals before your direct reports can start working on their goals.
- Adding Comments to Goals – You can add your thoughts and feedback directly to a direct report's goal at any time.
- Adding a Reflection to Direct Reports' Goals – When an employee closes a goal, you can add your thoughts about the outcome of the goal.

Watch the following help video for information about interacting with the goals of your direct reports:

Interacting with the Goals of Your Direct Reports

Viewing the Goals of Your Direct Reports

If you are a manager, you can view the goals of your direct reports on the Goals page and the Goals portlet. You cannot create or edit goals for your direct reports, but you can provide feedback by adding comments to their goals. 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.

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 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. If you are a manager, the portlet shows information about the goals of your direct reports on the Manager Dashboard. For more information, see Using the Manager Dashboard.

Tip: Click the name of any goal in the portlet to view the goal card.

Portlet Tab	Description
My Actions	Displays the following information about your own goals: ■ **Goals Starting Soon** — Displays goals that are starting in two weeks or less.

Portlet Tab	Description
	■ **Goals Due Soon** — Displays goals that are due in two weeks or less. Only goals approved by your manager are displayed. ■ **Overdue Goals** — Displays goals that are not started on time and goals that are not completed on time. If a goal is not started on time, the date in the Start Date column is bold. If a goal is not completed on time, the date in the Target Completion Date column is bold.
My Goals	Displays progress and time elapsed for the three goals that are on the top of the In Progress column on your Goals page.
Team Actions	Displays the following information about the goals of your direct reports: ■ **Approval Required** — Displays goals that you must approve. For more information, see Approving Goals. ■ **Overdue Goals** — Displays goals that are not started on time and goals that are not completed on time. If a goal is not started on time, the date in the Start Date column is bold. If a goal is not completed on time, the date in the Target Completion Date column is bold. ■ **Reflect on Goals** — Displays closed goals that you can write a reflection for. For more information, see Closing Goals. **Note:** This tab appears on the Manager Dashboard only if you are assigned as a supervisor to at least one employee in NetSuite.
Team Goals	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. **Note:** This tab appears on the Manager Dashboard only if you are assigned as a supervisor to at least one employee in NetSuite.

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:

1. From the home screen of your Employee Center role, go to Talent > Goals.
2. 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?**

3. 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 a focus area, from the **Area of Focus** list, select an Area of Focus.
- To clear all the filters on the page, click **Clear All Filters**.

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.

Adding a Reflection to Direct Reports' Goals

After a direct report closes a goal, NetSuite sends you an email. At this point, you can add a reflection to the goal to detail your final thoughts on goal's outcome.

To add a reflection to a direct report's goal:

1. In your Employee Center role, go to Talent > Goals.
2. From your team list, select a direct report.
3. In the **Closed** column, click a goal.
4. In the **Reflection** section, enter your thoughts about the outcome of the goal.
5. Click **Submit**.

Areas of Focus

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 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 **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: **Areas of Focus for John Smith**.
4. Click the **Current** subtab.
5. Enter an area of focus for the employee, then click **Add**.

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 or Rejecting Expense Reports

If you are a supervisor and your direct reports submit expense reports, you can find the link to approve expense reports in the Reminders portlet.

Approving Expense Reports

To approve an expense report:

1. On the Reminders portlet, click **Expense Reports to Approve**.
2. Under the **Approve** column, check the boxes next to the expense records you want to approve.
3. Click **Save**.

Rejecting Expense Reports

To reject an expense report:

1. On the Reminders portlet, click **Expense Reports to Approve**.
2. In the list of expense reports, click the date beside the report that you want to reject.
3. Click **Reject**.
4. On the Expense Report Rejection Notice Page, enter a message explaining why you rejected the report, and then click **Save**.

   An email message is sent to the employee who submitted the expense report. The employee can make changes to the rejected expense report and submit it again for approval.

Approving or Rejecting a Purchase Request or a Requisition

If you are a supervisor and your direct reports submit purchase requests or requisitions, you can use the Reminders portlet to approve or deny the requests.

> **Note:** Depending on how your company has set up requisitions in NetSuite, supervisors might not be required to approve requisitions. For more information, talk to your NetSuite administrator.

To approve a purchase request:

1. In the Reminders portlet, click **Purchase Requests to Approve**.
2. Check the box next to the purchase requests that you want to approve.
3. Click **Save**.

To reject a purchase request:

1. In the Reminders portlet, click **Purchase Requests to Approve**.
2. In the list of purchase requests, click the date beside the request that you want to reject.

3. Click **Reject**.
4. On the Purchase Request Rejection Notice page, enter a message explaining why you rejected the request, and then click **Save**.

   An email message is sent to the employee who submitted the purchase request.

To approve a requisition:

1. In the Reminders portlet, click **Requisitions to Approve**.
2. Check the box next to the requisitions that you want to approve.
3. Click **Submit**.

To reject a requisition:

1. In the Reminders portlet, click **Requisitions to Approve**.
2. In the list of requisitions, click the date beside the requisition that you want to reject.
3. Click **Reject**.
4. On the Requisition Rejection Notice page, enter a message explaining why you rejected the requisition, and then click **Save**.

   An email message is sent to the employee who submitted the requisition.

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.

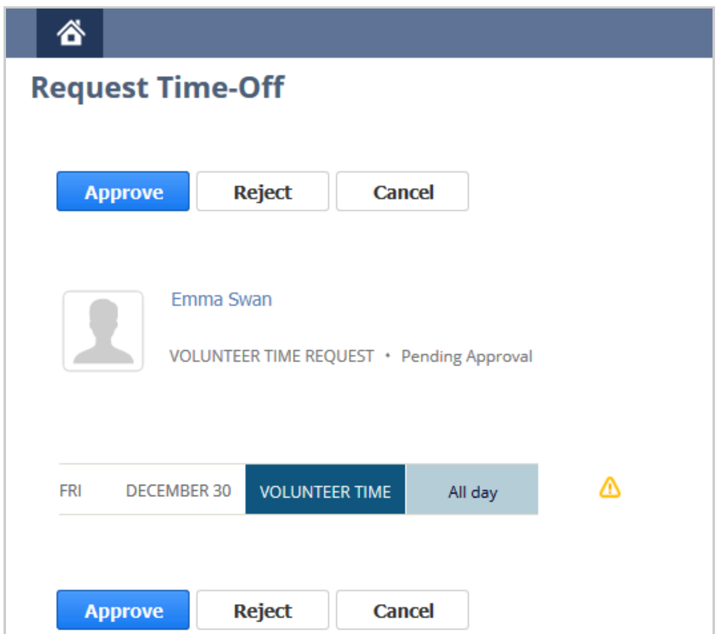
Rejected time-off requests cannot be resubmitted.

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.



> **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.

3. Click **Approve**, **Reject**, or **Cancel**.

   If you click Reject, you are prompted to enter a comment, which is sent to the employee.

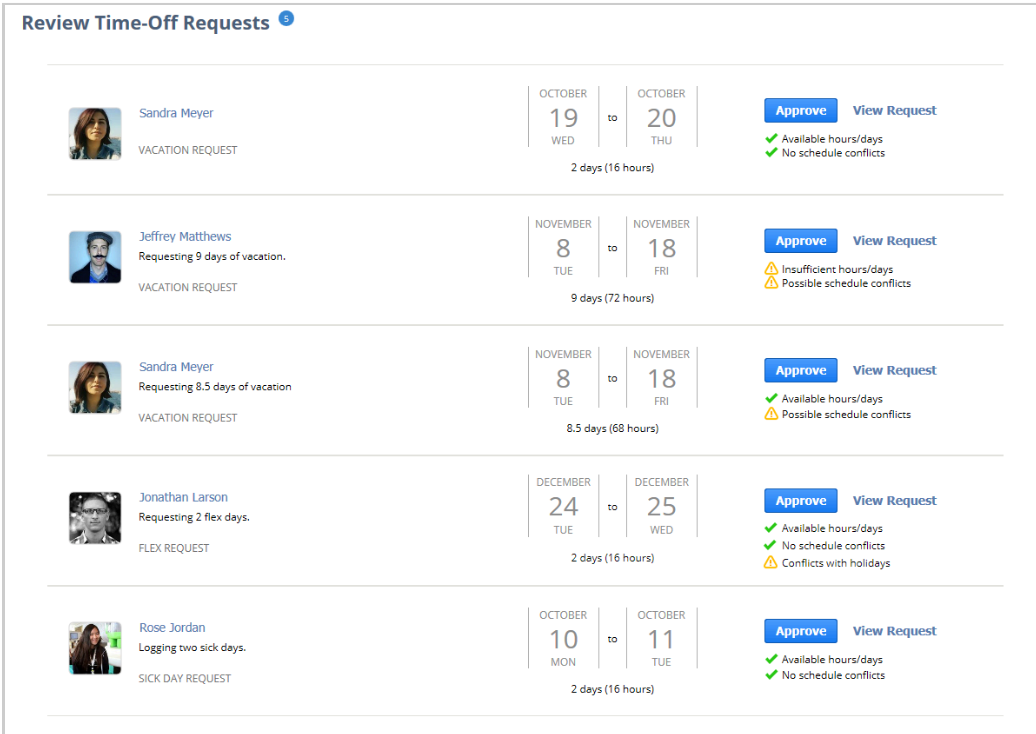
> **Note:** A rejected request cannot be resubmitted or canceled.

Viewing all Time-Off Requests Waiting for Approval

To view all time-off requests waiting for approval:

1. 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.



2. 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.

Customizing the Employee Center for Your Organization

If the Employee Center Dashboard Publishing feature is enabled in your NetSuite account, and if the Employee Center Publishing global permission is assigned to you, you can customize and publish a standard Employee Center dashboard for your organization. You can select the portlets and layouts for both the Employee and Manager dashboards (see Using the Manager Dashboard). You can also set up dashboards with specific content. For example, you can set up the Reminders portlet with specific reminders. All Employee Center users in your organization see the same dashboard when they log into NetSuite with their Employee Center role. Employees cannot edit or customize a published dashboard.

> **Important:** When the Employee Center Dashboard Publishing feature is enabled, any previous dashboards are replaced with a default dashboard that employees cannot customize. If the Employee Center Dashboard Publishing feature is disabled, previous versions of the Employee Center dashboard are restored, including employees' personalized dashboards.

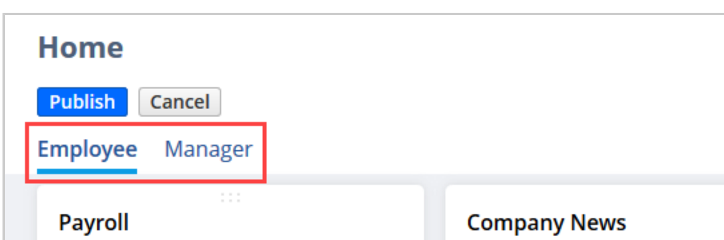
Permission Requirements

To use this feature, the Employee Center Publishing permission must be assigned to you in NetSuite. This permission is a global permission that is assigned on the employee record. For more information, contact your administrator.

Publishing the Employee Center Dashboard

To publish and edit the Employee Center dashboard:

1. On the Employee Center home page, in the top right-hand corner of the screen, click **Edit Dashboard**.
2. Edit either the Employee or the Manager dashboard:
   - To edit the employee dashboard, click **Employee**.
   - To edit the manager dashboard, click **Manager**.



3. Make your updates to the dashboard. For more details about editing a dashboard, including how to add, remove, and set up portlets, and how to change the layout of the dashboard, see Customizing the Dashboard.
4. When you are finished, click **Publish**.