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New Project Interface Preference for the Project Management Feature

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Other than feature enhancements, Netsuite 2021.1 release also includes enhancements for its Project Management Featire's User Interface (UI). The UI enhancement is currently optional in version 2021.1, but it is devised to become a new standard for the upcoming 2021.2 release.

The 2021.1 release phases are targeted from mid-February through mid-April of 2021. To verify the date of your upgrade, refer to your New Release portal.

What is Changing?

With the 2021.1 release, Netsuite introduced an enhanced UI for the Project Management feature. The enhancements include:

• **Customized Tasks and Task Hierarchy** - On the Schedule tab, the Expand All/Collapse All button which currently expands the entire hierarchy of existing tasks on the project will be replaced by a downward-facing arrow. When you click this arrow, the system will expand only the tasks and task hierarchy that you wish to display.

The following images show the new UI behavior after account upgrade to 2021.1 - a gradual system of expanding/collapsing the task hierarchy, using the downward-facing arrow button.

The first figure is a view of a reduced task hierarchy. In this figure, the system only displays the main tasks, while the subtasks remain hidden.

chedule	<u>R</u> esources	<u>F</u> inancia	al <u>P</u> roject Indica	tors P <u>&</u> L	R <u>e</u> lationships	<u>Communication</u>	Related Records	Prefere <u>n</u> ces	System Information	Custom
Project Tas	ks / Milestones									
VIEW										
Planning		New	/ Project Task Ne	w Milestone	View Gantt Chart	Customize View				
EDIT	ID	Ξ.	MILESTONE	1	NAME	P	REDECESSORS	START DA	ATE END DAT	E
Edit		1	No	C	> Put in lawn			9/5/201	2 9/10/20	112
Edit		12	No		> Build fence			9/5/201	2 9/14/20	112
Edit		19	No		Design home la	ndscape		9/3/201	2 9/5/201	2

The second figure shows the tasks on the same project, but now with the expanded hierarchy of the first main task by using the downward-facing arrow button. The subtabs of the main task are now on display.

Schedule	<u>R</u> esources	Financi	ial <u>P</u> roject Indicators	P&L Relationships <u>C</u> or	nmunication Related Re	cords Prefere <u>n</u> ces	System Information Custom
Pr <u>oj</u> ect Ta	sks / Milestones	5					
VIEW							
Planning		• Net	w Project Task New Miles	tone View Gantt Chart Cu	istomize View		
EDIT	ID	Ξ_	MILESTONE	NAME	PREDECESSORS	START DA	TE END DATE
Edit		1	No	V Put in lawn		9/5/2012	9/10/2012
Edit		2	No	- Plant shrubs	1155	9/7/2012	9/10/2012
Edit		3	No	- Acquire lawn mate	rial 19	9/5/2012	9/5/2012
Edit		4	No	- > Install sprinkler sy	stem	9/5/2012	9/7/2012
Edit		8	No	Plant grass		9/7/2012	9/10/2012
Edit		12	No	> Build fence		9/5/2012	9/14/2012
Edit		19	No	Design home landsca	pe	9/3/2012	2 9/5/2012

The third figure shows the whole task hierarchy of the first main task, displaying all subtabs and their daughters.

Schedule	<u>R</u> esources	<u>F</u> inanci	al <u>P</u> roject Indicators	P <u>&</u> L F	Relationships	<u>C</u> ommunicatio	n Related Records	Prefere <u>n</u> ces	System Information	Custom
Pr <u>oj</u> ect Tas	sks / Milestones									
VIEW										
Planning		Nev	v Project Task New Mi	estone Vie	ew Gantt Chart	Customize Vie	2W			
EDIT			NAME			PREDECESSORS	START DA	TE END DAT	END DATE	
Edit		1	No	~	Put in lawn			9/5/201	2 9/10/20	12
Edit		2	No	-	Plant shrubs		1155	9/7/201	2 9/10/20	12
Edit		3	No		Acquire lawn	material	19	9/5/201	2 9/5/201	2
Edit		4	No	. ~	Install sprinkl	er system		9/5/201	2 9/7/201	2
Edit		5	No		Cover sprir	nkler system	7	9/6/201	2 9/7/201	2
Edit		6	No	-	Dig trenche	es	19	9/5/201	2 9/5/201	2
Edit		7	No	L.	Install pipe	and hardware	6	9/5/201	2 9/6/201	2
Edit		8	No	>	Plant grass			9/7/201	2 9/10/20	12
Edit		12	No	>	Build fence			9/5/201	2 9/14/20	12
Edit		19	No		Design home lar	ndscape		9/3/201	2 9/5/201	2

• Streamlined Record Creation and Editing - Creating and editing records, for example, Project Tasks, Resource Allocation and Project Charge Rules, are now available from a pop-up window on the Project Form page.

The following figure shows an example of a pop-up window when a new Project Task/Milestone is being created on the project. The pop-up window is a floating panel and can be positioned around the browser page.

Primary Information					×				
JOB ID Test: Resource Manager 11/12 NAME	Project Task / Milestone								
PROJECT NAME Test: Resource Manager 11/12	Primary Information							1	1
Project Overview	CUSTOM FORM * Standard Project Task Form *	INSERT BEFORE	*						
CALCULATED WORK 118:00 PLANNED WORK 118:00	NAME *	STATUS * Not Started NON-BILLABLE	*						
Project Dates	PARENT TASK								
SCHEDULING METHOD Forward	-								
START DATE	Project Task Overview							1	1
9/3/2012	CALCULATED WORK	REMAINING WORK						1	
Classification	PLANNED WORK *	PERCENT COMPLETE							
SUBSIDIARY Parent Company	ACTUAL WORK								
EXPORT TO OPENAIR	Project Task Dates							1	
Schedule Resources Financial Project Indicators	CONSTRAINT TYPE As Soon As Possible 👻	FINISH NO LATER TH 3/3/2021	AN 🔲						
Project Tasks / Milestones	START DATE	END DATE							
VIEW	TEST NIKEY FIELD								
Mew Project Task New Mile	•								
EDIT ID 🚊 MILESTONE						STIMATED COST	STIMATED COST COPY TASK	STIMATED COST COPY TASK TEST NK	STIMATED COST COPY TASK TEST NKEY FIL
Edit 1 No	> Put in lawn	9/5/2012	9/10/2012	40 40		880.00	880.00 Copy	880.00 Copy	880.00 Copy
Fdit 12 No	> Build fence	9/5/2012	9/14/2012	58 50		1.090.00	1.090.00 Copy	1.090.00 Coov	1.090.00 Coov

• **Improved Record Viewing** – When you select the view mode for a record, the record opens in a new tab on your browser window.

As to help the users to get familiar with the new UI, Netsuite has included a temporary New Project Interface preference, which can be utilized to switch between the new and existing environments. It is highly encouraged for users to test the new interface, especially if they are using any customization or script in the production account.

Actions are suggested as soon after the account got upgraded to 2021.1, by completing the following steps preferably in the sandbox account:

- Go to Setup > Company > General Preferences and check the New Project Interface preference.
- Test out the behaviour of the new UI to ensure the enhancements not affecting current scripts and integrations (default/customized). Throughout 2021.1, users will be able to either enable or disable the new UI.

Note: if the account was upgraded to 2020.1 during Phase 1, the New Project Interface box is automatically checked. To revert to the original UI, uncheck the box and save the page.