



Setting Project Preferences

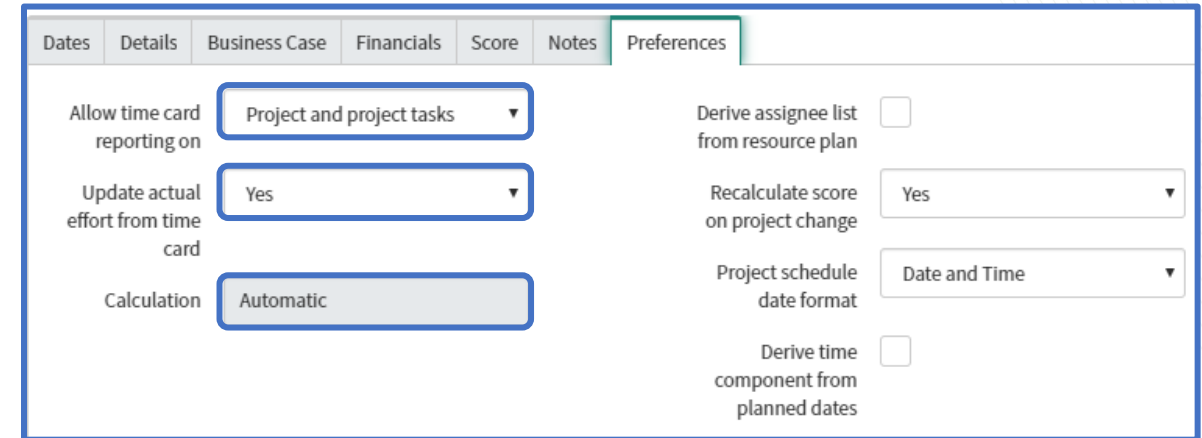
Quick Reference Guide

Setting Project Preferences

The Preferences tab allows a Project Manager to individually customize the settings for each of their projects.

Preferences Tab Fields:

- 1. Allow time card reporting on** – Determines if time can be booked to the project only, task only, project and task, or no time can be tracked at all.
- 2. Update actual effort from time card** – Determines if the Actual effort field on the Dates tab should be updated based on the hours entered from time cards for the project. If set to Yes, the Actual effort field is read-only on the Project and Project Task. If set to No, the actual hours from time cards are not rolled up to the project and task. By default, it is set to Yes.
- 3. Calculation** – Determines whether task dates are manually or automatically updated based on its dependents/child date changes. Once Automatic is saved, you can't go back to Manual.
- 4. Derive assignee list from resource plan** – If checked, you must have an **Allocated** Resource Plan on the Project in In order for a name to show up in the "Assigned to" or Additional Assignee List" on a Project Task.



The screenshot shows the 'Preferences' tab of a project management interface. The tab is highlighted with a green border. The interface includes several settings:

- Allow time card reporting on:** A dropdown menu set to 'Project and project tasks'.
- Update actual effort from time card:** A dropdown menu set to 'Yes'.
- Calculation:** A dropdown menu set to 'Automatic'.
- Derive assignee list from resource plan:** An unchecked checkbox.
- Recalculate score on project change:** A dropdown menu set to 'Yes'.
- Project schedule date format:** A dropdown menu set to 'Date and Time'.
- Derive time component from planned dates:** An unchecked checkbox.

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5. **Recalculate score on project change** – Determines whether to update the project score which is recalculated when the projects planned ROI%, estimated cost, or risk is modified.
6. **Project schedule date format** – Determine if the time component (08:00:00) displays in the Planning Console.
7. **Derive time component from planned dates** – Determines whether the time component (08:00:00) in the Actual start/end date fields should be copied from the time component in the Planned start/end date fields. Note, the value of this “Derive time component” field only applies when the Actual start/end date fields are filled in manually.

Dates	Details	Business Case	Financials	Score	Notes	Preferences
Allow time card reporting on	Project and project tasks ▼					Derive assignee list from resource plan <input type="checkbox"/>
Update actual effort from time card	Yes ▼					Recalculate score on project change Yes ▼
Calculation	Automatic					Project schedule date format Date and Time ▼
						Derive time component from planned dates <input type="checkbox"/>