Setting User Account Preferences

Icons in this job aid

Steps

Open the Preferences Menu

2. Click My Account then Preferences to open the user preferences menu.

Update General Preferences

1. Update the following items in the General Preferences drop-down list according to your preferences: Duration Unit, Effort Unit, Timescale, Decimal Precision for Effort and Duration, Date and Time Display, Date and Duration, and Calendar Week Starting Day.
It may make sense to choose different timescale and effort duration options depending on length of your usual projects. The questions for the fields above may help you decide what to choose.

2. Select Allocation for the field called Leaf Level Requirement Assignment Type.

3. Do not change Resource Name to Resource Initials in the item called Display if Resource Image is Unavailable. VUMC is not using named individuals as Resources yet, so changing this field to Resource Initials would not be beneficial.

**Update Resources Preferences**

1. Click Resources to switch to the Resources Preferences menu.
2. Click the **Timescale** drop-down to change the default view of resource availability. If you prefer to see resource effort listed in FTE on reports, **check the box** next to **Display Profiled Effort in FTE**.

Planview calculates FTE effort based on a standard 40-hour work week.

**Update Financial and Investment Planning Preferences**

1. Click **Financial and Investment Planning** to switch to the Financial Preferences menu.
2. Update these items according to your preferences: Currency Scale, Currency Decimal Precision, Effort Unit – Financial Planning, Effort Unit – Investment and Capacity Planning. If you prefer reports and screens in Planview to show currency symbols, check the box next to Show Currency Symbol.

3. Click **Save** to exit the Preferences menu.