



OpenAir

Admin Guide

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Introduction

Overview

OpenAir is a highly configurable system that provides superb project management capabilities for companies and service providers in many different industries. System Administrators are involved in many aspects of the OpenAir system. This OpenAir System Admin Guide helps you as you tackle your System Administration duties. They may include:

- Knowing how your particular OpenAir environment is configured and the options that exist to enhance your system functionality.
- Entering or supervising the entry of key information such as new employees or contracts, and maintaining the information accuracy.
- Modifying form permissions on OpenAir forms and designating them as required, read-only, or hidden to meet specific company needs. This can assist you in controlling sensitive information using application roles. See [Form Permissions Overview](#) and [Roles Overview](#).
- Answering questions about using the system. Many times you become your company's Help Desk. Many System administrators produce employee guides that address your company's configuration.
- Ensuring compliance with your company processes and policies by maintaining best practices within OpenAir.

In this document, we address the configuration options that exist within OpenAir. While you may already use some of them in your system, others may be something you will consider implementing at a future date for specific needs identified by your employees. You've probably asked yourself "How can I change...?" or "Can I do...?" This document is designed to help you answer some of those questions.

Configuring OpenAir Settings

There are two types of switches that control the OpenAir configuration: internal switches and company switches. There are also integration settings. Each is described in more detail as follows.

Internal Switches

Many internal switches are set by your Professional Services Consultant when your OpenAir account is configured. Later, as you become aware of new functionality through release updates available on the login screen, you can [Creating a Support Case](#) and request that an internal switch be enabled in your account. Generally, these requests relate to new features. When a new feature is enabled, you must log out of your OpenAir account and then log back in to see the new feature.

Company Switches and Settings

The other type of switch is a company switch. You can configure company switches as well as account-wide settings. To find these switches and settings, go to the Administration application. When you enable these features or make changes to the settings, you do not need to log out and then log back in. The changes display immediately. Company switches and settings are:

- **Global Settings** — Account-wide settings that display under sections of the Administration application. They are explained in detail in [Administration - Global Settings](#).

- **Application Settings** — Application Settings address specific functionality within each application. An application is addressed in each chapter of this guide. You can locate the specific settings associated with an application and review the relevant forms. Under each of the Application Settings, there is a catch-all group of settings titled Other settings. Many of these settings are already pre-configured in new accounts based on OpenAir experience. We explain how enabling these settings affects your OpenAir account.

Account Integration Settings

OpenAir integrations are available for a number of software programs. If not set up initially when your OpenAir account is configured, we recommend that you contact your Sales Representative or Professional Services Consultant to discuss implementation. Frequently, you may want assistance in the initial configuration. Integrations include:

- Add-on services such as OpenAir OffLine, OpenAir Mobile, OpenAir Outlook Connector, and NetSuite OpenAir Projects Connector.
- NetSuite
- QuickBooks

OpenAir offers a desktop XML API tool titled NetSuite OpenAir Integration Manager. It enables you to import and export from and to CSV text files. You can also use this tool to run the QuickBooks integration.

In addition, OpenAir Exchange Manager supports exchanging information with Microsoft Exchange 2007, and 2010. You can export project task assignments, resource bookings, and time off request calendar commitments from OpenAir to employees' Microsoft Outlook calendars.

Multiple Sessions

You may have multiple sessions of OpenAir running on the same computer at the same time. This is helpful when you are using multiple applications within OpenAir since it saves data entry time by avoiding switching to different applications within the same instance.

User Interface

The user interface is particularly relevant to your role as a System Administrator as well as to those employees who have been granted role or form privileges to access configuration items in your environment.

Administrators set the view employees see on each Employee's Demographic form. On the Employee Demographic form under Page Layout, there are two key switches that control the user interface:

- Enable enhanced user interface
- Enable Administration menu instead of Account menu

Note: The OpenAir user interface reflects improvements in usability. Over the past several years, functions have been combined into different categories. A previous user interface was the Account menu structure. We recommend that companies now use the Administration menu.

Terminology

You can customize all terminology in OpenAir to meet the unique needs of your company. For example, one company may use the word project to describe work to be accomplished. Another company may

call it a case, job, or assignment. Please keep this in mind as you review the contents of this document. For more information on customizing terminology, see [Interface: Terminology](#) in [Administration - Global Settings](#).

Application Overview

The OpenAir system contains various applications, which are designed around specific functional areas such as Projects, Timesheets, Expenses, and Resources. The way these applications operate in your environment is dependent on the business needs of your company. This Admin Guide steps through the configuration options and provides business and operational processes as well as best practices for the different applications. The applications are described as follows:

Dashboard Application — The Home application is essentially a home base application that is meant to convey critical information to employees such as messages and reminders of pending approvals. It also contains various wizards, which help you quickly update data throughout the system. You can mount reports onto the dashboard for quick access to saved reports. You can enable a graphical reporting dashboard to represent saved reports in forms such as pie charts and line graphs. While this is helpful, not all reports designed in OpenAir lend themselves to graphical representation. See [Home](#).

Reports Application — The Reports application provides employees the ability to create and run a wide variety of reports based on your company's configuration. NetSuite OpenAir provides a robust and flexible reporting environment. See [Reports](#).

Workspaces Application — The Workspaces application provides employees with an area to store documents and share them with others. It acts as an administrative library within OpenAir. See [Workspaces](#).

Expenses Application — The Expenses application is where employees may enter expense reports against projects for a specific date or period of time. It also can handle authorizations for employee spending on company expenses. See [Expenses](#).

Invoices Application — The Invoices application handles financial transactions such as client charges and invoices in OpenAir. Primarily focused on invoicing your clients, the Invoices application manages the results of running the billing rules that you can set up for projects in the Projects application. See [Invoices](#) and [Projects](#).

Opportunities Application — The Opportunities application enables you to manage prospective new business for your company with existing clients as well as with new clients and prospects. You are able to create Deals, Estimates, Proposals, To dos, and Events within the application. Many current OpenAir companies now use the OpenAir/NetSuite integration for this functionality. See [Opportunities](#) or contact OpenAir Support and request information about the OpenAir/NetSuite integration.

Projects Application — The Projects application is one of the primary components within NetSuite OpenAir. This is the application where management of your company's projects takes place. The application is very flexible and provides a number of features to address your company's needs. See [Projects](#).

Purchases Application — The Purchases application within OpenAir provides the ability to create a process flow from a purchase request to fulfillment and receipt, and lets you track purchases made within your company. See [Purchases](#).

Resources Application — The Resources application enables you to schedule resources to projects. It also provides a vehicle to store an employee's skill set, education, industry experience, job roles and location in the OpenAir database. You can then search the database to find the right resource. See [Resources](#).

Timesheets Application — The Timesheets application is where employees record their time against client and/or internal projects. See [Timesheets](#).

Administration Application — This is where you control your company's settings and switches and many configuration options within OpenAir. There are two main selections under Administration: Global Settings and Application Settings. Each is described as follows.

- **Global Settings** include the account-wide settings and options. For descriptions of the forms and an explanation of their use, see [Administration - Global Settings](#).
- **Application Settings** include the functional application configuration options as well as data entity creation and maintenance. Each of the chapters in this guide presents an application. Reviewing them will help you gain a better understanding of the applications.

User Center — The User Center draws together all OpenAir user features into a common area. Hover over the User Center to access the Help and Support features.



Note: OpenAir Support cannot act as an administrator for company specific data-related items such as unlocking employee accounts or resetting passwords. As a System Administrator, you perform these tasks for your company.

Log Out

The Log out option from the User Center menu closes your NetSuite OpenAir session and displays a Log in screen within your browser should you want to re-enter OpenAir. Closing your browser session at any time when logged into OpenAir will also log you out of OpenAir and cancel your session.

Getting Help

OpenAir provides a variety of resources to give you help when you need it. From self-service tools like the PDF user guides, the Help Center and SuiteAnswers to OpenAir's customer training and support, you can always find answers to your questions.

The following resources are available:

Documentation Resources

- [OpenAir Documentation Overview](#) — a list of OpenAir documentation resources.
- [OpenAir Help Center](#) — a description of the resources offered in the OpenAir Help Center
- [SuiteAnswers](#) — a description of the resources offered in SuiteAnswers and how to [Creating a Support Case](#).

Additional Resources

- [OpenAir Professional Services](#) (External link) — learn about how OpenAir Professional Services can make implementing OpenAir fast and effective.
- [OpenAir Education Services](#) (External link)— a summary of the training and certification resources available.

OpenAir Documentation Overview



In its most comprehensive form, the OpenAir documentation is published as user guides in PDF format, which you can view and print. Each PDF guide describe a particular aspect of OpenAir and add-on services.

Most of the user guides content is accessible to view on your browser using the OpenAir Help Center. The same help topics are also available in the SuiteAnswers support and learning center. In addition, SuiteAnswers provides support knowledge base articles, training videos, and other resources. For more information, see [OpenAir Help Center](#) and [SuiteAnswers](#).

This section lists the OpenAir guides currently available and gives a brief description of their content.







OpenAir Basics

The following guides are useful references for all OpenAir users:

User Guide	<p>The guide gives a quick introduction to the OpenAir product and describes how to use its interface and features.</p> <p> OpenAir User Guide</p>
Glossary	<p>The guide provides a glossary of terminology used in OpenAir.</p> <p> OpenAir Glossary</p>




Account Administration

The following guides are intended primarily for administrators and users with the sufficient role permissions to configure some areas of OpenAir.

Admin Guide	<p>The guide describes OpenAir features and procedures as well as configuration settings. It is a reference guide for administrators and users with delegated role permissions responsible for setting up and maintaining an OpenAir account.</p> <p> OpenAir Admin Guide</p>
Customization Guide	<p>The guide describes the customization features account administrators can use to tailor OpenAir to meet their unique business needs. The following features are described: Custom Fields, Form Permissions, Notifications and Approval Processes.</p> <p> OpenAir Customization Guide</p>
Database Guide	<p>The guide provides a visual representation of the OpenAir database as viewed through the OpenAir SOAP API and XML API.</p> <p> OpenAir Database Guide</p>
Optional Features Book	<p>The guide lists and describes the optional features that can be enabled by OpenAir Support for your account. The features described in this guide correspond to the lists of enabled feature account administrators can view in OpenAir by navigating to Administration > Global Settings > Enabled Features.</p> <p> OpenAir Optional Features Book</p>
Performance Tuning Guide	<p>The guide describes the steps a user can take to improve the responsiveness of OpenAir to their specific requests. The guide covers hardware and network-related issues, general performance issues, and application specific issues.</p> <p> OpenAir Performance Tuning Guide</p>
Security Guide	<p>This guide outlines the security features currently available for OpenAir and describes security-related controls and configuration settings.</p> <p> OpenAir Security Guide</p>

Integration







The following guides are intended primarily for administrators and describe the OpenAir integrations available either as optional features in the OpenAir application or as Windows Server desktop applications.

Business Intelligence Connector Guide	<p>The guide documents the OpenAir Business Intelligence Connector. The OpenAir Business Intelligence (BI) Connector gives you point and click access to OpenAir from existing reporting, business intelligence, workflow, and integration applications.</p> <p> OpenAir Business Intelligence Connector Guide</p>
NetSuite Connector Guide	<p>The guide describes the OpenAir NetSuite Connector and how to configure, run and use the integration between OpenAir and NetSuite.</p> <p> OpenAir NS Connector Guide</p>
SAML 2.0 Quick Start Guide	<p>The guide provides information on how to enable Security Assertion Markup Language (SAML) Single Sign-On for the OpenAir web application and OpenAir Mobile apps.</p> <p> OpenAir SAML 2 Quick Start Guide</p>
Exchange Manager Guide	<p>The guide documents the OpenAir Exchange Manager. OpenAir Exchange Manager provides the ability to exchange information between OpenAir and Microsoft Outlook calendar for all mapped users.</p>

	 OpenAir Exchange Manager Guide
Integration Manager Guide	<p>The guide documents the OpenAir Integration Manager. OpenAir Integration Manager is an import, export, and data update application specifically designed for use with the OpenAir application.</p> <p> OpenAir Integration Manager Guide</p>



Add-on Services




The following guides describe the add-on services — mobile and desktop applications — available to OpenAir users.

OpenAir Mobile User Guide	<p>The guides describe how to install and use OpenAir Mobile for Android or iPhone for exchanging timesheets and expenses information between an OpenAir account and an Android device or iPhone.</p> <p> OpenAir Mobile 3 User Guide</p> <div>  Note: For documentation referring to legacy versions, see  OpenAir Mobile 2.3 for Android User Guide  OpenAir Mobile 2.6 for iPhone User Guide. </div>
OpenAir OffLine User Guide	<p>The guide documents the OpenAir OffLine application. OpenAir OffLine extends the convenience of your OpenAir account to your personal computer. It supports entering charges, expenses, and time on all tasks to which you are assigned.</p> <p> OpenAir OffLine User Guide</p>
Projects Connector Guide	<p>The guide documents the OpenAir Projects Connector application. OpenAir provides OpenAir Projects Connector as a tool for exchanging project plan information between OpenAir Projects and Microsoft Project.</p> <p> OpenAir Projects Connector Guide</p>

Platform



The following guides are references for developers and administrators wishing to leverage OpenAir platform features to extend the functionality of OpenAir or develop their own OpenAir integration.

REST API Reference Guide	<p>The guide provides a reference for developers wanting to use OpenAir REST Web Services for the exchange of OpenAir data between the main site and peripheral programs. It describes OpenAir REST API and lists the supported methods and resource endpoints.</p> <p> OpenAir REST API Reference Guide</p>
SOAP API Reference Guide	<p>The guide provides a reference for developers wanting to use OpenAir Web Services for the exchange of OpenAir data between the main site and peripheral programs. It describes OpenAir Web Services and lists the commands and data types provided by the Simple Object Access Protocol (SOAP) API.</p> <p> OpenAir SOAP API Reference Guide</p>
User Scripting Guide	<p>The guide describes OpenAir User Scripting, a component of the OpenAir platform allowing you to customize OpenAir to better meet the unique needs of your business.</p>

	 OpenAir User Scripting  OpenAir User Scripting Reference Card
XML API Reference Guide	<p>The guide provides a reference for developers wanting to use OpenAir XML API for the exchange of OpenAir data between the main site and peripheral programs. It provides an overview of OpenAir XML API and lists the XML commands and datatypes available using the application programming interface.</p> <p> OpenAir XML API Reference Guide</p>

New Release Resources

A number of resources are available to help you become familiar with, and prepare for, new features introduced in each release.

Sneak Peeks	<p>The Sneak Peeks are published a few weeks before an OpenAir release and provide an overview of selected new features planned for the upcoming OpenAir release.</p> <p> OpenAir Sneak Peeks</p>
Release Notes	<p>Release Notes are published during release preview and provide overviews of new features planned for the upcoming OpenAir release.</p> <p>View the Release Notes or the current and past releases of OpenAir online. To view the Release Notes in OpenAir, go to the User Center menu > Support > Release Notes.</p>
Release Preview Test Plan	<p>The test plan describes the recommended release preview process. The Release Preview environment enables you to become familiar with the new features in an upcoming release. You can verify that your existing business workflows function as expected before the upgrade to your production account.</p> <p> OpenAir Release Preview Test Plan</p>

OpenAir Help Center

You can use the OpenAir Help Center to consult OpenAir documentation and other resources if you are an account administrator or if you have the View Help Center role permission.

The OpenAir Help Center includes:

- Online version of OpenAir product documentation.

Note: All product documentation available in the OpenAir Help Center is also available in OpenAir PDF guides and OpenAir SuiteAnswers. However, not all OpenAir PDF guides are available in the Help Center. The most advanced documentation is currently only available in PDF format. For an overview of the product documentation available, see [OpenAir Documentation Overview](#)

- Additional resources including a platform solution catalog, catalogs of training resources available from OpenAir SuiteAnswers, a library of product documentation books available as downloadable PDF.
- What's new section including:
 - Release notes for the latest OpenAir release.
 - A list of interim enhancements released made available since the latest OpenAir release.

- A release notes archive. This archive includes release notes for all past OpenAir releases since September 2000.



Note: The content of the release notes archive is excluded from the Help Center search. It is available for reference only – The features described in the release notes archive may have been changed or removed in later releases.

The release notes archive is available only in the OpenAir Help Center.

- Help Center updates.







Tip: The OpenAir Help Center is refreshed regularly with new or updated content. Go to What's New > Help Center Update for a summary of changes in recent versions of the Help center.

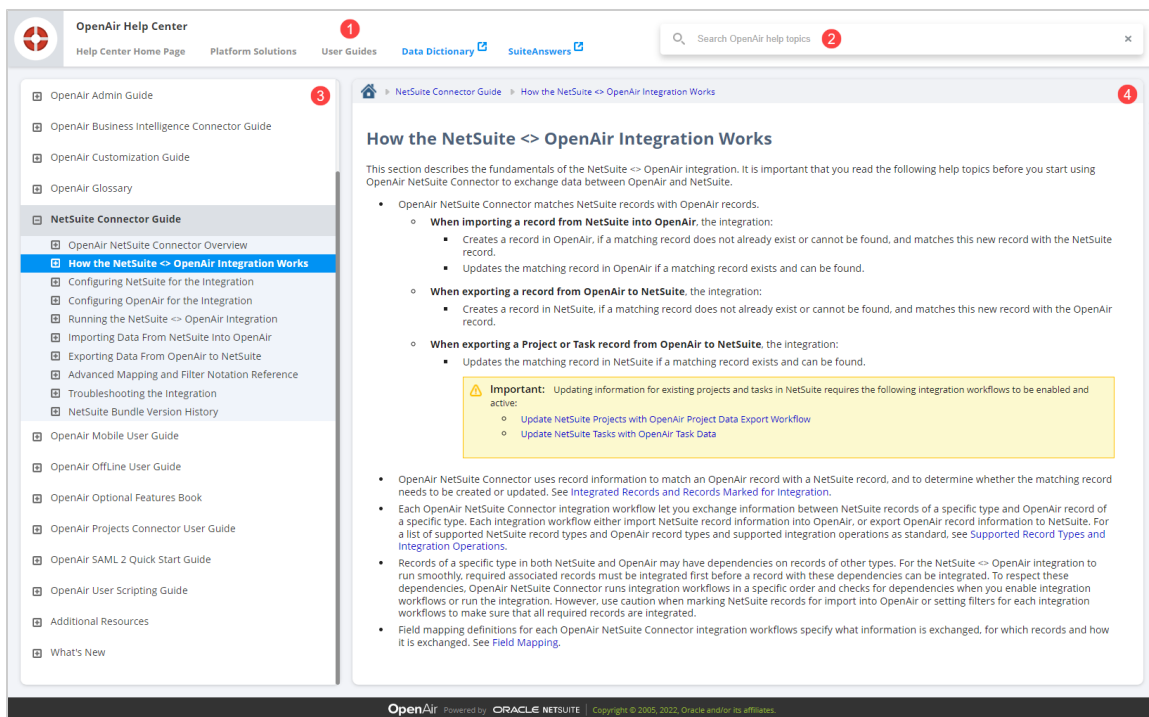
To access the OpenAir Help Center, click the User Center button, then **Help Center**. You can also access the Help Center from the following locations in OpenAir:

- Support page — Click the User Center menu then Support to access the Support page. On the Support page, click **Release Notes** to view the list of enhancements in the latest OpenAir release.
- Enabled Features list — Go to Administration > Global settings > Reports > Enabled features and click an entry in the Enabled Features list to view the relevant help content.
- OpenAir NetSuite Connector Contextual Tips — Go to Administration > NetSuite Connector, and click the Tips button then **OpenAir NetSuite Connector Guide**.
- OpenAir NetSuite Connector Health Check — Go to Administration > NetSuite Connector, and click the Tips button then **Health Check**. Click one of the health check recommendations to view the relevant help content.
- OpenAir NetSuite Connector administration form — Go to Administration > NetSuite Connector, and click the Tips button then **NetSuite Connector administration form**. Click one of the administration setting labels to view the relevant help content.

The OpenAir Help Center opens in a new browser window or tab and takes you directly to the relevant help topic.

1	<p>Use the links in the screen header to navigate quickly to specific landmark help center pages or to external resources</p> <ul style="list-style-type: none"> ■ Help Center Home Page — The default page for the OpenAir Help Center. ■ Platform Solutions — A catalog of all real world use case script examples described in OpenAir User Scripting Guide. Learn more about these examples and download the solutions from the platform solutions page. ■ User Guides — OpenAir User Guides are printable, PDF documents that provide conceptual information as well as step-by-step instructions on select OpenAir product areas. ■ Data Dictionary — The Data Dictionary is an information resource for account administrators, advanced users and developers creating custom integrations with OpenAir. It provides a summary of all tables, and standard fields in OpenAir. ■ SuiteAnswers — SuiteAnswers is a self-service support site where you can view support articles, training videos, help topics, and best practice documents on OpenAir products. From SuiteAnswers, you can also submit a question or issue via email or contact OpenAir Customer Support by phone. <p>Resources outside the OpenAir Help Center such as the OpenAir Data Dictionary or OpenAir SuiteAnswers show in blue color and with the external resource icon .</p>
2	<p>Search help topics by entering a keyword or phrase in the search bar and clicking the search icon .</p> <p>You can search the Help Center content for specific topics. The search results are listed with the best match for your search term at the top and a visual indication of how well the topic matches your search terms.</p>

	To search for exact search phrase, use double quotation marks around the search phrase. For example, to see a list of help topics mentioning "project stage" without listing help topics mentioning "project" or "stage" separately, enter the search phrase "project stage" with double quotation marks.
3	<p>Browse help topics in the table of contents pane</p> <p>The table of contents in the left pane lets you navigate the Help Center content organized by theme. The theme and content are the same as for each PDF guide</p> <p>Click the expand  to show help topics in a book, chapter or section.</p> <p>Click the collapse icon  to hide all help topics in the book, chapter or section.</p> <p>Click a heading to view the help topic in the right pane</p>
4	<p>View help topics in the main content pane</p> <p>The help topic you are viewing, and the book and chapter the help topic is part of, are highlighted in the table of contents pane. Breadcrumbs at the top of the help topic on the right pane lets you see the relation between the help topic you are viewing and higher level pages (section, chapter and book). You can use the breadcrumbs as a secondary navigation aid to browse related help content.</p>



The screenshot displays the OpenAir Help Center interface. At the top, there's a navigation bar with links to 'Help Center Home Page', 'Platform Solutions', 'User Guides', 'Data Dictionary', and 'SuiteAnswers'. A search bar is located on the right. The left sidebar shows a table of contents with categories like 'OpenAir Admin Guide', 'OpenAir Business Intelligence Connector Guide', 'OpenAir Customization Guide', 'OpenAir Glossary', 'NetSuite Connector Guide', 'OpenAir Mobile User Guide', 'OpenAir OffLine User Guide', 'OpenAir Optional Features Book', 'OpenAir Projects Connector User Guide', 'OpenAir SAML 2 Quick Start Guide', 'OpenAir User Scripting Guide', 'Additional Resources', and 'What's New'. The 'NetSuite Connector Guide' is expanded, showing sub-topics like 'OpenAir NetSuite Connector Overview', 'How the NetSuite <-> OpenAir Integration Works', 'Configuring NetSuite for the Integration', 'Configuring OpenAir for the Integration', 'Running the NetSuite <-> OpenAir Integration', 'Importing Data From NetSuite Into OpenAir', 'Exporting Data From OpenAir to NetSuite', 'Advanced Mapping and Filter Notation Reference', 'Troubleshooting the Integration', and 'NetSuite Bundle Version History'. The 'How the NetSuite <-> OpenAir Integration Works' topic is selected and highlighted. The main content area shows the title 'How the NetSuite <-> OpenAir Integration Works' and a detailed explanation of the integration process, including sections on 'When importing a record from NetSuite into OpenAir', 'When exporting a record from OpenAir to NetSuite', and 'When exporting a Project or Task record from OpenAir to NetSuite'. An 'Important' note highlights that updating information for existing projects and tasks in NetSuite requires specific integration workflows to be enabled and active. The footer of the page indicates 'OpenAir Powered by ORACLE NETSUITE | Copyright © 2000, 2022, Oracle and/or its affiliates.'

SuiteAnswers

The SuiteAnswers support and learning site is available from the OpenAir support page.



All OpenAir users have searchable access to a rich repository of answers with SuiteAnswers. SuiteAnswers is your one-stop destination for support, training, and documentation inquiries. In direct response to customer demand for more self-service, SuiteAnswers provides searchable access to support solutions, best practices, training videos and technical documentation.

Use the SuiteAnswers portal to:

1. Search the technical documentation and knowledge base articles for an answer to any support question.
2. View ranked search results sorted by relevance.
3. Browse the Learning Center's training catalog and watch a video.
4. Rate and provide feedback on all articles and training courses.
5. [Creating a Support Case](#).

Creating a Support Case

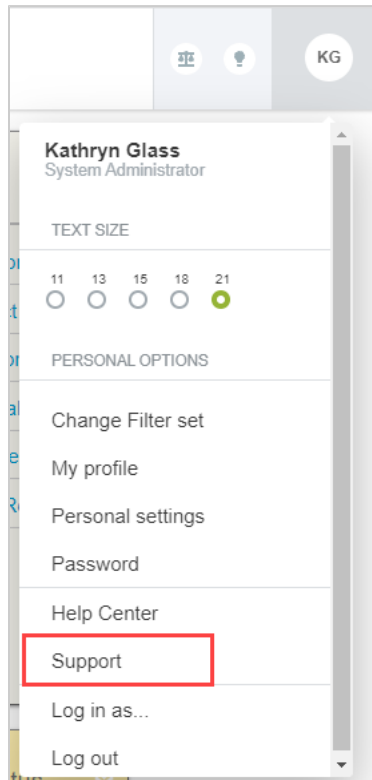
If you are experiencing difficulties with OpenAir or would like to enable an optional feature, go to SuiteAnswers through your OpenAir account and create a support case.

Our support staff and engineers will work with you to find a solution to your problem.

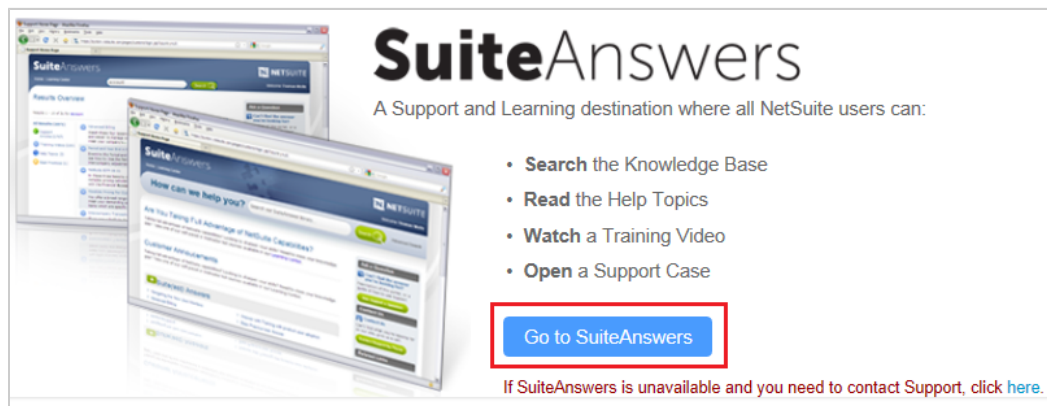
Important: As a part of the support case creation process you will be presented with existing answers that may solve your problem. Take a moment to view the available answers before proceeding to create a support case.

To create a support case:

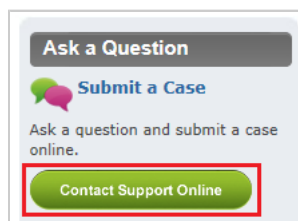
1. Log in to your OpenAir account and select **Support** from the User Center menu.



2. Click on the **Go to SuiteAnswers** button.



3. From the **SuiteAnswers** site home page, click **Contact Support Online**.



4. Enter your question keywords and click **Search**.

Enter keywords related to your question.

Note: If you do not have a question, i.e. you need a switch enabled, just click **Search**.

5. Very often the answer to your question will be displayed. If you still want to create a support case click **Continue to Create Case**.

Enter keywords related to your question.

We found the following answers that may help with your question. Click any answer to read it in a new window.

6. Fill out the **Create Case** form and then click the **Submit**. You will receive an email confirmation with **Your OpenAir Customer Care #**.

Create Case

What would you like to do? *

Case Severity *

You can expand this section to review the description of each Case Severity. If you need to change the Case Severity, please provide specific details regarding the nature of the severity.

Subject *

Question *

Product Area *

Feature

Attach Document

Email *

Phone (Optional)


Note: An asterisk * displays after required fields.

Global Features

Global features are features which affect multiple modules or areas within OpenAir.

OpenAir Business Intelligence Connector

The OpenAir Business Intelligence Connector gives you point and click access to OpenAir from existing reporting, business intelligence, workflow, and integration applications. The connector allows you to access OpenAir data as an OData V4 data feed without the need to write any code.

 **Note:** To enable this feature, please contact your OpenAir account manager. This feature does not support SAML users.

When the OpenAir Business Intelligence Connector is enabled, OpenAir saved reports can be published to OData and refreshed manually or on a schedule, and selected List Views can be published and data accessed through them using your OpenAir credentials.

You access the OpenAir Business Intelligence Connector with your OpenAir credentials and you can only see the data that you have been granted access to by your OpenAir administrator. Administrators control a user's ability to publish reports and list views with the following role permissions:

- **Publish reports**
- **Enable publishing of shared reports to OData service with recipient's permission**
- **Enable publishing of shared reports to OData service with owner's permissions**
- **Publish ListView via OData.**

To learn more about OpenAir Business Intelligence Connector, see  [OpenAir Business Intelligence Connector Guide](#).

Customization Center

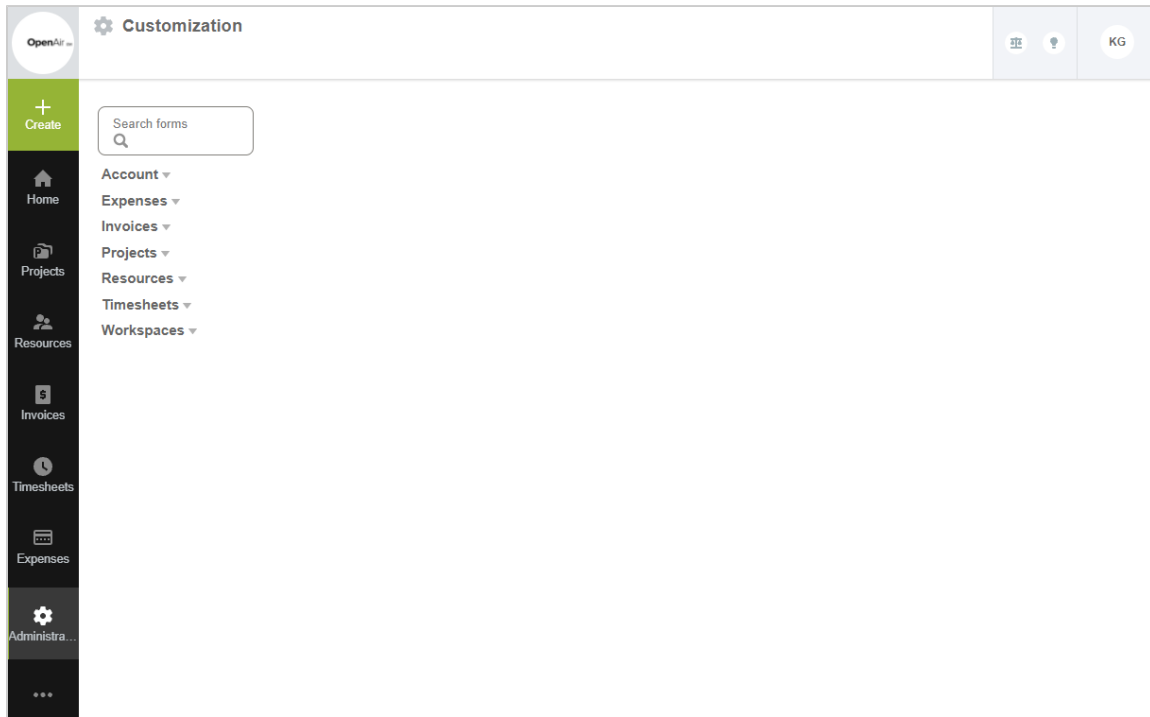
The Customization Center allows you to control and apply form customizations from a central location.

This provides the following advantages:

- Rapid access to customizations features
- Allowing a change to be made easily across a set of affected forms
- Validating the settings made between related forms

To use the Customization Center, go to Administration > Customization.

For more information, see  [OpenAir Customization Guide](#).



Deleting Transactions or Records from OpenAir and Its Database

Users with appropriate role permissions can mark transactions or records for deletion in OpenAir. This does not yet purge the transaction or record from the OpenAir database, but sets its "Deleted" field to 1.

Note: Only transactions or records which are not associated with another transaction or a child record can be marked for deletion, unless those associated transactions or records themselves have been marked as deleted.

If the "Updated" field for a record flagged for deletion has a date which is 6 months or older when an OpenAir release occurs, the record is removed from the database.

Note: Due to the timing between when a record is marked for deletion and when an OpenAir release occurs, it could take up to a year for a record to be completely removed from the OpenAir database.

Feature-Specific User Satisfaction Feedback Form

OpenAir uses an optional feedback form to gather feedback about specific features. It will help OpenAir gain insight and improve the features usability and user experience in future.

The feedback form is currently enabled for the following features:

- Advanced resource search

- Consolidated resource profile
- Expenses module
- Outline, Gantt and task detail view
- Project center
- Receipt attachments user interface
- Resource compare view

The feedback form appears after the user has interacted with the feature several times. For example, users will be asked for feedback after running a number of searches on the Advanced Resource Search, updated profiles a number of times using the Consolidated Resource Profile, or loading the Compare view a number of times.

Users can opt out of the survey either by selecting the **Don't show me this feedback form again** option on the feedback form or by selecting **Disable feature-specific survey form** in Personal settings. Users can opt in again later by changing the preference in Personal settings.

The feedback form consists of a simple satisfaction question, asking users to rate the feature on a scale.

Users can postpone answering by clicking **Show me later** or closing the popup window, and the feedback form will pop up again 30 days later.

How satisfied are you with
Advanced Resource Search?

Extremely satisfied Somewhat satisfied Neither satisfied nor dissatisfied Somewhat dissatisfied Extremely dissatisfied

☐ Don't show me this feedback form again.
You can change the preference later in Personal Settings.

SHOW ME LATER SUBMIT

If the response is either negative (Somewhat dissatisfied / Extremely dissatisfied) or neutral (Neither satisfied nor dissatisfied), users are prompted for additional optional feedback

Once the form is submitted, a message displays to thank users for their feedback and the answers are stored. Users will not be prompted again for feedback on the same feature unless significant changes have been made to the feature and feedback is required to measure whether these changes have improved the feature for end users.

The feature-specific user satisfaction responses data can be downloaded using Administration > Global Settings > Integration: Import/Export > Export All data in MySQL format or Administration > Global Settings > Automatic backup service.

Note: The feature-specific user satisfaction survey can be disabled for your account. To disable this feature, please contact OpenAir Support.

Query Builder for Email Notifications

The Query Builder feature can create complex and customized notifications for events in OpenAir.

Query Builder notification conditions are organized into groups which each contain a condition statement such as "if all of the following conditions are true" or "if none of the following conditions are true". A notification is sent when the conditions you've created are met.

Note: To enable this feature, please contact OpenAir Support and request the Query Builder feature.

Warning: Conditions with groups can only be created with this feature enabled. If you later disable this feature, notifications created when this feature was enabled will be deactivated if they contain groups.

To create a notification using Query Builder:


1. Go to Administration > Application Settings > [Select the module settings which requires a notification] > Notifications.
2. Click the Create button and click the type of notification you want to create under "New". The new notification form appears.
3. Enter a "Rule name" for the notification. This name will appear in the Notifications list view.
4. In the "Send a notification ..." section, click the dropdown list and select the appropriate condition statement. The following condition statements are available:
 - If ALL of these conditions are TRUE
 - If ALL of these conditions are FALSE
 - If ANY of these conditions are TRUE
 - If ANY of these conditions are FALSE
5. Click the ADD CONDITION button to add new conditions to condition statement. Click the ADD GROUP button to add a new condition statement to which conditions can be added.

Note: You can also add conditions to a group using the + icon under the group's condition statement.

6. In the "Notify" section, select who the notifications should be sent to when triggered.


7. In the "Email message" section, enter the subject of the email which will be sent when the notification is triggered, and any text you would like to have in the Email body. Use the "Field" dropdown list to add variables to the email body.
8. In the "Other" section, select "Active notification" to allow the notification to trigger in OpenAir.
9. Click **Save**.

To delete a group or condition in Query Builder:

1. Click the delete  icon next to the condition or group you want to delete.


To move a group or condition to a new location within the query in Query Builder:

1. Click the  icon on the left of the group or condition and drag it to a new location within the query.

 **Note:** When you drag a group which has conditions associated with it, both the group and its conditions are moved together.


Restoring Deleted Attachment Files

You can restore deleted files, including receipt photos, résumés or CVs, or other attachments, to a specified workspace or to their original location, or download the files to your PC.

 **Note:** Records deleted 6 months or prior to the date of the attempted restoration are not generally available for restoration. Record retention periods may change in the future. In addition, restored files count against your account's file storage limit.

To restore a deleted file to its original location:

1. Go to Administration > Global Settings > Account and click **Restore deleted document/folders**.

 **Note:** The original location must still exist to restore a deleted file to it. You cannot restore a deleted file to a deleted record.

2. In the **Run an Action** column, select the checkbox next to the file or files you want to restore.
3. In the **Run an Action** dropdown list, select **Restore files to original records**.
4. A dialog appears showing the status of the restored files. Click the **Click here** link to close the window and refresh the list of deleted files.

To restore a deleted file to a workspace:

1. Go to Administration > Global Settings > Account and click **Restore deleted document/folders**.
2. In the **Run an Action** column, select the checkbox next to the file or files you want to restore.
3. In the **Run an Action** dropdown list, select **Restore deleted files**.
Alternatively, you can click the **Undelete** button in the **Commands** column.
4. In the Actions dialog, select a Workspace to restore the deleted files to and click **OK**.
5. A dialog appears showing the status of the restored files. Click the **Click here** link to close the window and refresh the list of deleted files.

To download a deleted file to your PC:

1. Go to Administration > Global Settings > Account and click **Restore deleted document/folders**.
2. In the **Run an Action** column, select the checkbox next to the file or files you want to restore.
3. In the **Run an Action** dropdown list, select **Download**.
Alternatively, you can click the **Download** button in the **Commands** column.
4. Select a location to save the file to and save the file.

Saving List View Configurations

If you have the Save List View Configurations feature enabled, you can save and load list view configurations and share them with others.

Note: To enable this feature, please contact OpenAir Support and request the **Save List View Configurations** feature. This feature also enables the **Create public list views** user setting, which can allow users to create list view configurations which other users can also see and use.

This feature saves your list view configurations, including which columns appear in the list, column order, sort-by column, and the sorting order. You can then reload the configuration any time you want to use it, or create alternate list view configurations. Finally, you can create public list view configurations which your other users can apply.

You can save list view configurations for all existing list views. Saved list view configurations are linked to the list views they can be applied to. For example, your project list views have their own sets of list view configurations, as do expense list views and invoice list views.

When you first open a list view, it will be given an “Untitled” name, which can be changed if you save the configuration.


Tip: If you are using the “Untitled” system default configuration or a default configuration set by an account administrator and you want to retain these changes, make sure you save the list view configuration.

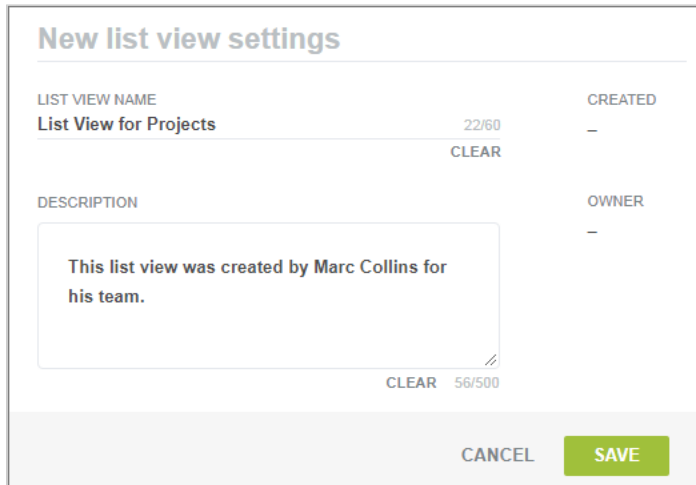
Account administrators may set or change a default configuration at any time. Unsaved changes will be lost and the new default configuration will automatically apply to your list view if:

- You were using the system default “Untitled” configuration.
- You were using a default configuration set by an account administrator, and that configuration is no longer available as a public list view configuration.

Pre-Sales Pending In Progress On Hold Cancelled Closed Internal Templates All								BULK ACTIONS ⓘ	Untitled ▼	📄	🔍	⌵	⋮
Project stage	Project	Client	Department	Project owner	% Complete	Start Date	Finish Date						
All	All	Zibura Technologies	All	All		All	All						
<input type="checkbox"/> Cancelled	Hardware implementation	Zibura Technologies	Professional Services	Portier, Marie	53% <div></div>	17-06-2020	25-01-2022						
<input type="checkbox"/> On Hold	System reconfiguration	Zibura Technologies	Professional Services	Portier, Marie	100% <div></div>	16-12-2019	27-04-2020						
<input type="checkbox"/> Pre-Sales	Data migration services	Zibura Technologies	Technical Services	Portier, Marie	0% <div></div>	21-02-2022	06-06-2022						

To save a new list view configuration:

1. Go to the list view you would like to save the configuration for.
2. Click the  icon next to the “Untitled” configuration name and click **Save as**.
3. In the **New list view settings** window, enter a name for the list view configuration in the **List View Name** field (required). You can also enter an optional description of up to 500 characters in the **Description** field.



New list view settings

LIST VIEW NAME
List View for Projects 22/60
 CLEAR

CREATED
 —





DESCRIPTION
 This list view was created by Marc Collins for his team.
 CLEAR 56/500

OWNER
 —

CANCEL SAVE

4. Click **Save**.


The “Untitled” list view configuration name will change to the name you have given the configuration.

Pre-Sales	Pending	In Progress	On Hold	Cancelled	Closed	Internal	Templates	All	BULK ACTIONS ⓘ	List View for Proje...				
Project stage	Project	Client	Department	Project owner	% Complete	Start Date	Finish Date							
All	All	Zibura Technologies	All	All		All	All							
<input type="checkbox"/> Cancelled	Hardware implementation	Zibura Technologies	Professional Services	Porter, Marie	53% <div></div>	17-06-2020	25-01-2022							
<input type="checkbox"/> On Hold	System reconfiguration	Zibura Technologies	Professional Services	Porter, Marie	100% <div></div>	16-12-2019	27-04-2020							
<input type="checkbox"/> Pre-Sales	Data migration services	Zibura Technologies	Technical Services	Porter, Marie	0% <div></div>	21-02-2022	06-06-2022							


If you make changes to a list view configuration after it has been saved, the configuration name will appear with a red asterisk. You can save changes to the same list view configuration, or save the changes as part of a new list view configuration.

List View for Projects *

To save changes to an existing list view configuration:


1. Go to the list view you would like to save the configuration for.
2. Click the  icon next to the currently opened configuration name and click **Save**.

To create a new configuration from an existing one:

1. Go to the list view and select a configuration.
2. Click the  icon next to the currently opened configuration name and click **Save as**.
3. In the **New list view settings** window, enter a name for the list view configuration in the **List View Name** field (required). You can also enter an optional description of up to 500 characters in the **Description** field.
4. Click **Save**.


If you make changes to a saved list view configuration which you do not want and haven't saved the changes, you can discard them.

To discard unsaved changes to a list view configuration:

1. Click the  icon next to the configuration name and click **Discard changes**.
2. Click **OK** in the confirmation window.


You can also edit the name, description, or privacy flag of a saved list view configuration.

To edit a saved list view's properties:

1. 1. Go to the list view and select the configuration you want to edit.
2. Click the  icon next to the configuration name and click **Edit properties**.
3. Make changes to the properties and click **Save**.


Saved list view configurations can be deleted.

To delete a saved list view configuration:

1. Go to the list view and select the configuration you want to delete.
2. Click the  icon next to the configuration name and click **Delete**.
3. 3. Click **OK** in the confirmation window.


Alternatively, you can delete list view configurations one at a time or in bulk from the **Manage saved list views** screen.

To access the Manage saved list views screen:

1. Go to the list view which contains the configuration you want to delete.
2. Click the  icon next to the configuration name and click **Manage saved list views**.


You can easily switch between the list view configurations you've created using **My saved list views**.

To change to one of your saved list view configurations:

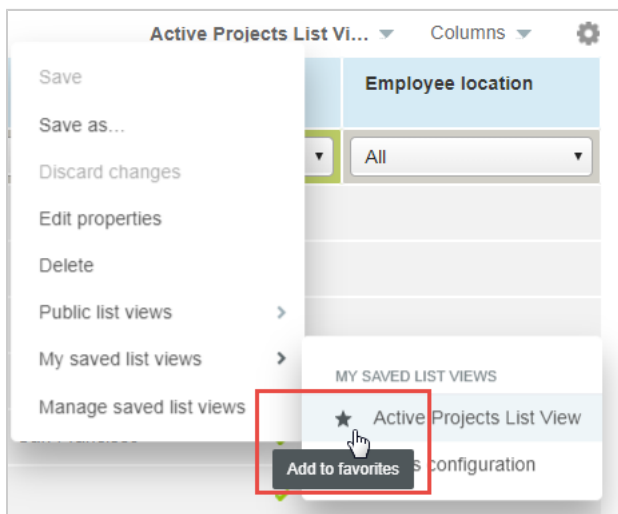
1. Click the  icon next to the configuration name and click **My saved list views**. Saved list views icon.
2. Click the list view configuration you want to load.

Alternatively, you can apply a list view configuration from the **Manage saved list views** screen.

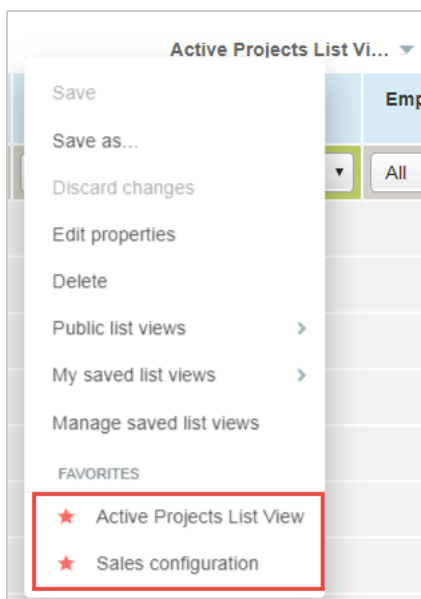
To change to one of your saved list view configurations from the Manage saved list views screen:

1. Go to the list view which contains the configuration you want to apply.
2. Click the  icon next to the configuration name and click **Manage saved list views**.
3. In the **Actions** column, click the **Apply to list view** link next to the list view to apply.
4. Click **OK** in the confirmation window.

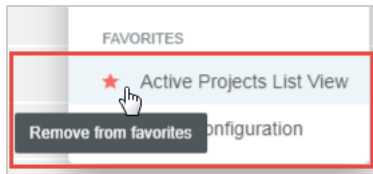
You can also set list view configurations as favorites from the **My saved list views** dropdown list. To select a favorite list view configuration, point to the configuration's name in the My saved list views dropdown list and click the star icon next to the name.



Favorite list view configurations appear in a special **Favorites** section of the main configuration dropdown list.



To remove a configuration from your favorites, click the red star icon next to its name.



If you have the **Create public list views** user setting, you can make your list view configurations public so that other users can apply them to their list views.

To assign the Create public list views user setting:

1. Go to Administration > Global Settings > Employees and click an Employee ID.
2. Select the **Create public list views** option on the Demographic > Optional Features section.
3. Click **Save**.

Note: Administrators must also set this permission on their user demographic to be able to create public list views.

To make a list view configuration public:

1. Go to the list view which contains the configuration you want to make public.
2. Click the ▼ icon next to the configuration name and click **Edit properties**.
3. Select the **Make this list view public** option.
4. Click **Save**.

 A screenshot of the 'Edit list view settings' form. The form has several fields: 'LIST VIEW NAME' (Project List View 1), 'CREATED' (03/16/18 08:56 AM), 'DESCRIPTION' (a text area with placeholder 'Type description here...'), and 'OWNER' (Collins, Marc). The 'PRIVACY' section is highlighted with a red box and contains a checked checkbox labeled 'Make this list view public'.

Administrators and users with the **View and modify all saved list views** role permission can set a list view configuration as the default configuration for a list view. This default configuration will be applied to the list view for new users and for all users currently using the system default ("Untitled") configuration. All unsaved list view property changes will be lost for these users. If you change the default configuration, the new default configuration will only apply for all users using the previous default configuration if you delete the previous default or make it private. If you modify a default or public list view configuration,

these changes will not apply for existing users unless they switch away from that list view configuration and back to it again.

To set a configuration as default

1. Go to the list view which contains the configuration you want to set as default.
2. Click the ▼ icon next to the configuration name and click **Edit properties**.
3. Select the **Use this list view as default for new users** option.
4. Click **Save**.

Edit list view settings

LIST VIEW NAME
List View for Timesheets 24/60
CLEAR

DESCRIPTION
Example list view configuration for Timesheets
CLEAR 46/500

CREATED
02/13/19 02:39 AM

OWNER
Collins, Marc

PRIVACY
☒ Make this list view public

SET AS DEFAULT
☒ Use this list view as default for new users

CANCEL SAVE

Note: The default configuration will be applied to the list view for all users currently using the system default or “Untitled” configuration. Users can personalize the default list view configuration. If a user changes any list view properties, these changes will continue to apply the next time the user navigates to the list view unless you change the default configuration and delete the previous default configuration or make it private.

Viewing and Modifying All Saved List View Configurations for an Account

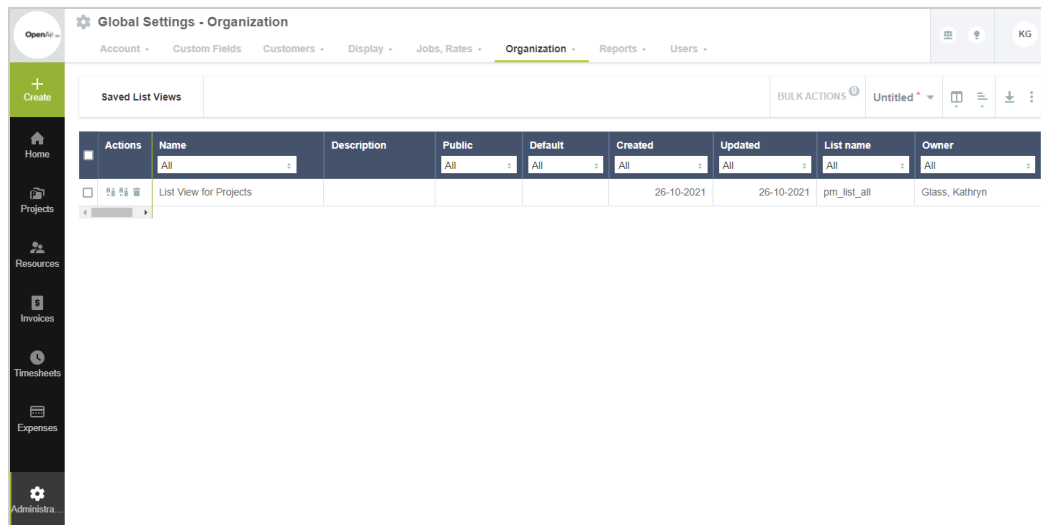
Administrators and users with the **View and modify all saved list views** role permission can access all saved list view configurations in an account from the Administration module. Users can also manage saved list views configurations from within list views. From here, users can also see who list view configurations belong to, and run actions on one or several list view configurations.

To assign the View and modify all saved list views role setting:


1. Go to Administration > Global Settings > Roles and click a Role name.
2. Select the **View and modify all list views** option under the General Settings section.
3. Click **Save**.

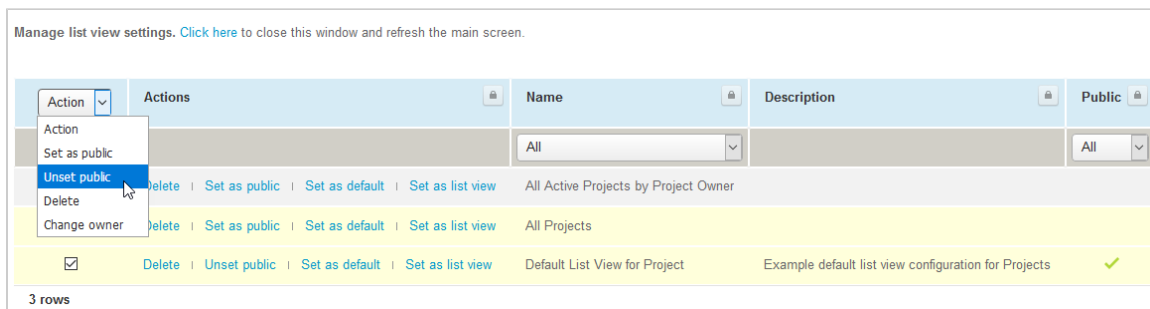
To manage all saved list view configurations in an account:

1. Go to Administration > Global Settings > Saved list views.



To manage saved list view configurations from within list views:

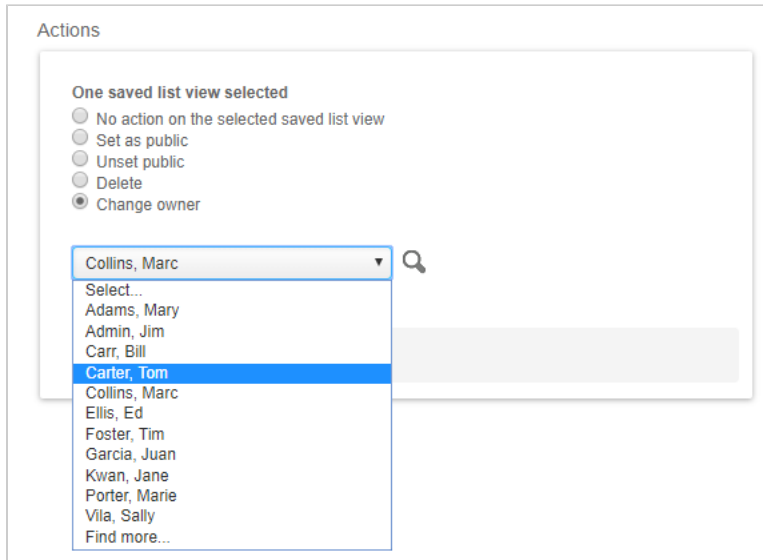
1. Go to the list view.
2. Click the  icon next to the currently opened configuration name and click **Manage saved list views**.
3. The **Manage list view settings** window appears, containing a list of all saved configurations created by users in your account for the current list view.
4. Once you have finished managing the list view configurations, click the **Click here** link at the top of the window to return to the active list view.



From **Manage list view settings**, users can perform the following actions on list views, from either the **Action** dropdown list or the **Actions** column:

- **Set as public** — make the list view configuration available for other users to apply to their list views.
- **Unset public** — make the list view configuration available only for its owner and administrators.
- **Delete** — delete the list view configuration.
- **Change owner** — select a user who owns the list view configuration. If the list is not public, only the current owner and administrators can access the configuration. This action is only available from the **Action** dropdown list.

Note: The **Change owner** option is very helpful for when users leave the company or change departments, as administrators can now reassign their list view configurations to other users.



- **Set as default** — apply the list view configuration as the default list view configuration for new users and for all users currently using the system default (“Untitled”) configuration. This action can only be performed for one list view configuration at a time. It is only available from the **Actions** column.
- **Set as list view** — apply the list view configuration to the currently active list view. This action can only be performed for one list view configuration at a time. It is only available when managing list view configurations from within a list view and from the **Actions** column.

Timesheets

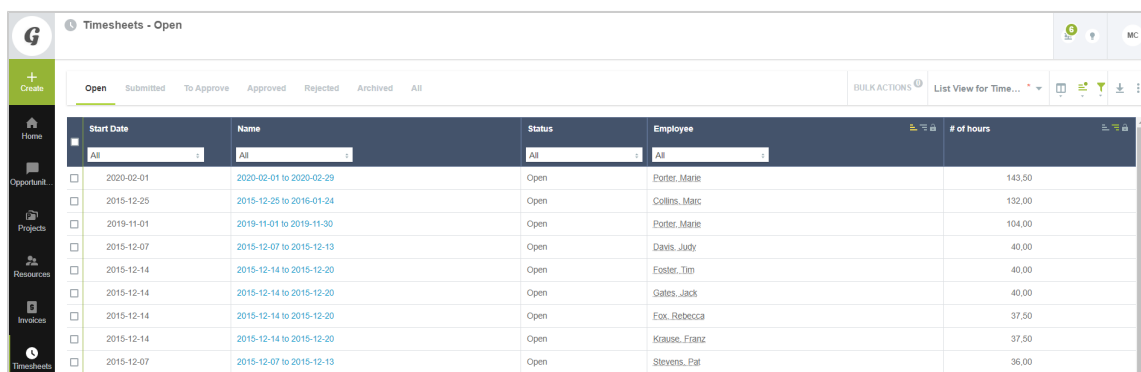
Overview

The Timesheets application provides employees with a place to keep track of the time worked on projects. This is also where managers approve employee timesheets. An employee must have an active employee license to enter time in the application. All employees fill out time against a project, and when approved, you can run billing rules to capture time worked and can invoice clients. Timesheets are classified by default as open, submitted, approved, rejected, or archived.

In addition, you can configure the Timesheets application to support the following.

- Employees can create time off requests. See [Other Settings](#) and the company switch to enable time off requests.
- Managers can reject a line item entry on a timesheet. To enable this feature, [Creating a Support Case](#) and request the following switch be enabled: Enable line item rejection of time entries.
- Administrators can create timesheet rules and the approval process. See [Timesheet Rules](#) and [Approval Processes](#).
- Administrators can manage the layout of timesheet reports and time off requests. See [Timesheet Report Layout](#) and [Time Off Request Layout](#).
- Administrators can create alerts to notify employees their timesheet is late, notify managers that their approval of timesheets is overdue, and alert employees that a timesheet has not been saved. See [Alerts](#).
- Administrators can create notifications for a variety of timesheets and time off request events. To enable this feature, [Creating a Support Case](#) and request the following switch be enabled: Enable administration of notifications in the following application settings: (Timesheets).
- Administrators and employees with the proper role permissions can track leave accrual balances. See [Run Leave Accruals](#).

Timesheets




The screenshot shows the 'Timesheets - Open' interface. It features a sidebar with navigation icons for Home, Opportunities, Projects, Resources, Invoices, and Timesheets. The main area displays a table of timesheet entries with columns for Start Date, Name, Status, Employee, and # of hours. The table is filtered to show 'Open' status timesheets. The data includes entries for various dates and employees, with the number of hours recorded for each.

Start Date	Name	Status	Employee	# of hours
2020-02-01	2020-02-01 to 2020-02-29	Open	Porter, Marie	143.50
2015-12-25	2015-12-25 to 2016-01-24	Open	Collins, Marc	132.00
2019-11-01	2019-11-01 to 2019-11-30	Open	Porter, Marie	104.00
2015-12-07	2015-12-07 to 2015-12-13	Open	Davis, Judy	40.00
2015-12-14	2015-12-14 to 2015-12-20	Open	Foster, Tim	40.00
2015-12-14	2015-12-14 to 2015-12-20	Open	Gates, Jack	40.00
2015-12-14	2015-12-14 to 2015-12-20	Open	Fox, Rebecca	37.50
2015-12-14	2015-12-14 to 2015-12-20	Open	Krause, Franc	37.50
2015-12-07	2015-12-07 to 2015-12-13	Open	Stevens, Pat	36.00

The Timesheets application is where employees record their time against client or internal projects. Employees can enter time against Clients, Client : Project, and other combinations such as Tasks and



Services. There are a number of other additional data elements that may be required based on your company's configuration such as Time types or Payroll types.

 **Note:** You can review and modify your company's terminology definitions in Global Settings. See [Interface: Terminology](#).

Creating, Editing, and Deleting Timesheets


New timesheets can be created from anywhere within NetSuite OpenAir.

Creating a New Timesheet

1. Click the **Create** button in the upper-left corner of the screen. If you are already within the Timesheets application, select **Timesheets (New...)** or **Timesheets (New clone...)**. If you are anywhere outside of the Timesheets application, click the **Create** button and in the right half of the dialog box, select either **Timesheets: Timesheet, New** or **Timesheets: Timesheet, New clone**.
 - Selecting **New...** creates a completely new timesheet.
 - Selecting **New clone...** creates a new timesheet which is a copy of an already-existing timesheet.
2. If you selected **New...**, set the timesheet starting date, add notes, allow timesheet overlapping, and add attachments to your timesheet.
 If you selected **New clone...**, set the timesheet starting date, the timesheet to duplicate, and choose how to populate the hours cells. As with **New...**, you can add notes and attachments to the timesheet.
3. Click the **Save** button. Your new timesheet will appear on the screen.
4. Fill in the Client: Project, task, and hours worked for each day.
 - You can add a description and notes for each task by clicking the Note/Description  icon next to each hours cell.
 - Clicking the  icon pins the timesheet hours cells so that if your window is re-sized or there is a long list of days, as many cells as possible stay visible on screen.
5. When finished, click either **Save** to save the report or **Save & submit** to save the timesheet AND submit it for approval.




Editing an Existing Timesheet

1. Go to Timesheets > Timesheets. A list of your existing timesheets appears.

 **Note:** Your role may prevent you from editing timesheets which do not belong to you.

2. Click on the timesheet name of the timesheet you would like to edit. The timesheet will open up.
3. Make your changes to the timesheet.
4. When finished, click either **Save** to save the report or **Save & submit** to save the timesheet AND submit it for approval.

Each time sheet has a number of tabs which allow you to edit the timesheet.

- Under **Edit** you can change the Client or Project, Task, and Hours for each day, and add Descriptions and Notes to each hours cell.
 - Click the  icon next to a row to create a copy of that row.
 - Click the  next to a row to delete that row. A small dialog appears asking you to confirm the deletion.
 - Click the  to search for Clients or Projects.
- Under **Hours remaining**, you can see the number of hours left for each task you entered time for. The **System estimate (hrs)** field shows how many hours are left based on the initial number of hours set for the task. If you think the task will take more or less time than the initial estimate, you can adjust it in the **Hours remaining** field for each task.
- Under **Report**, you can see a tabular layout of your timesheet which can be printed, saved as a PDF, or downloaded as a CSV or HTML file.
- Under **Properties**, you can edit the timesheet's accounting date, default time type, default client or project, and default task. You can also add notes or attachments.
- Under **Submit/Approve**, you can see the Approval history for the timesheet, along with any notes for each approval stage.


Editing a Rejected Timesheet

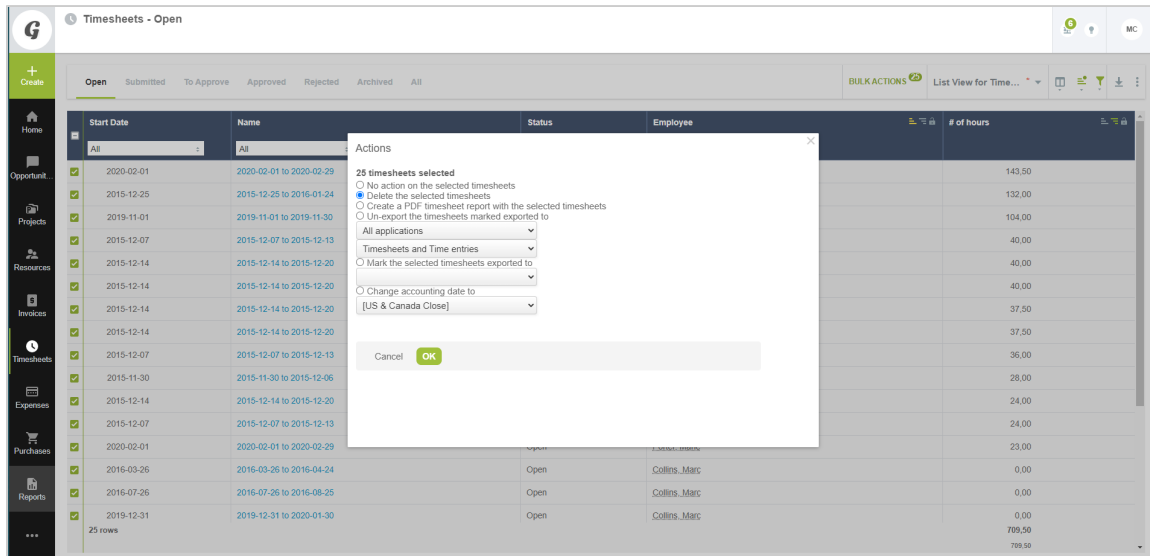
1. If your timesheet approver rejects a timesheet or individual time entries in a timesheet, the timesheet or time entries are returned to you. To find them, navigate to Timesheets > Timesheets > Rejected.
2. Click the timesheet or time entries you would like to edit. A detailed report of the rejected timesheet or time entries appears.
3. Click **Edit** below the Timesheet title. The timesheet edit screen appears.
4. Make your changes to the timesheet or time entries, and click **Save** or **Save & Submit**.
 - If you click Save, the timesheet is only saved, but not submitted.
 - If you click Save & Submit, the timesheet is saved and submitted to your approver.

Deleting a Timesheet

1. Go to Timesheets > Timesheets and click on the name of the timesheet which you want to delete. Your timesheet will open.
2. Click on **Properties**. In the Properties screen, click **Delete**.
3. A dialog box will open asking you to confirm the deletion. Click **OK**. Your timesheet will be deleted and you will be taken to the Timesheets list.

Bulk Deleting Timesheets

1. Go to Timesheets > Timesheets and select all the timesheets you want to delete by clicking the checkboxes next to them.
2. Click the Run an action icon  at the top of the Run an action column. A dialog box will open.
3. Select **Delete the selected timesheets** in the dialog box and Click **OK**.
4. A dialog appears showing confirming the number of timesheets deleted. Click the **Click here** link to close the window and return to the Timesheets list view.



Note: Only administrators and users with the **Allow employee to delete (individually or in bulk) open, submitted or rejected timesheets** can run a bulk delete action on timesheets. To enable this feature, [Creating a Support Case](#) and request that the following internal switch be enabled in your account: Administrators can delete employees timesheets.

Approval Processes

You can configure OpenAir to require approval for certain type of transactions before these transactions can be processed. See [Approval Options](#).

Approval is available for the following record types:

- Expenses: Expense reports, Expense authorizations.
- Invoices: Invoices, Credit invoices, Rebill invoices.
- Opportunities: Proposals.
- Projects: Bookings, Project budgets.
- Purchases: Purchase requests, POs.
- Resources: Bookings, Booking requests, Resource profile (optional feature)
- Timesheets: Timesheets, Time off requests.

You can select who approves transactions depending on the type of transaction at different levels:

- Employee level (Administration > Users > Employees > [Select an employee] > Demographic).
- Department level (Administration > Organization > Departments > [Select a department] > Approvals) — You can use this to control employee level approval settings for each employees in the department from the same page.
- Project level (Projects > Projects > [Select a project] > Properties).



Important: When project level approvals are enabled and set for the project associated with the transaction to be approved, transactions submitted for approval are routed according to both project level and employee level approval settings. Transactions submitted for approval are routed according to the project level approval settings first, and routed according to the employee level settings after the project level approvals are obtained.

Approval can be routed to:

- A named employee.
- A dynamic value (metavalue) — The approval is routed to an employee determined automatically based on the project or the employee associated with the transaction to be approved.

Examples of metavalues include:

- [Project owner] — Approvals are routed to the employee who owns the project associated with the transaction to be approved.
- [Manager] — Approvals are routed to the manager of the employee who owns the transaction to be approved.
- An approval process.

Approval processes let you define multiple levels of approval required before transactions can be processed. For each level of approval, you can set the approver to a named employee or a dynamic value, set an alternative approver to avoid self-approval, and configure automatic escalation to ensure that transactions progress through the approval process.

You can create any number of approval processes to meet your business requirements. See [Creating an Approval Process](#).

You can modify an existing approval process only if there are no records or transactions progressing through this approval process. Changes to the approval process will apply to the relevant records or transactions submitted after you modify the approval process. See [Modifying an Approval Process](#).

Creating an Approval Process

OpenAir lets you create multilevel approval processes to meet your business requirements.

To create an approval process:

1. Go to Administration > Application Settings > *[Select an application]* > Approval processes.



Note: You can access the full list of approval processes defined for your account list from any of the Expenses, Invoices, Opportunities, Purchases, Resources, and Timesheets application settings. The same approval process may be used for different transaction types across different OpenAir modules.

2. Click the Create button then **New approval process**.

The approval process entity form appears.

Cancel **SAVE** **SAVE & CREATE ANOTHER**

New

Approval process

[Text input field]

Sequence Number	Approver	If approver is equal to submitter, send to	Auto-approve rules	Can not edit
1	Select...	Select...	> Create	<input type="checkbox"/>
2	Select...	Select...	> Create	<input type="checkbox"/>
3	Select...	Select...	> Create	<input type="checkbox"/>
4	Select...	Select...	> Create	<input type="checkbox"/>
5	Select...	Select...	> Create	<input type="checkbox"/>

[Add rows]

If approver is equal to submitter, send to

Select...

☐ A sequence number requires only one approval
If this option is checked any approval auto-approves for all approvers with the same sequence number

3. Enter a descriptive name for the **Approval process**. Descriptive names are helpful when you manage a large number of approval processes.
4. Define the process using the rows available. You can use the **[Add Rows]** dropdown to add more rows if required.

For each row:

- a. Select a **Sequence Number**. The sequence number indicates the level of approval (the order in which the record or transaction is routed for approval). Multiple rows can have the same sequence number.
- b. Select an **Approver**. This can be a named employee or a dynamic value (metavalue) such as a [Project owner] or [Manager].
- c. (Optional) **If approver is equal to submitter, send to** — Select an alternative approver in case the selected approver is the same as the employee who submitted the record or transaction for approval, if self-approvals are not authorised.

Note: You can also set an alternative approver for the entire approval process (step 5). Setting an alternative approver for the entire approval process is equivalent to setting the same alternative approver for each row.

- d. (Optional) Set up **Auto-approve rules**. You can configure OpenAir to approve the record or transaction automatically when they match certain criteria. To do so:
 - i. Click **Create**.

The Auto-approve rules form appears.

- ii. Check the box for each rule you want to apply, and select the field (if applicable), the comparison operator, and the value.
- iii. Click **OK**.
- e. (Optional) Check the **Can not edit** box to prevent the approver from modifying the record or transaction before approving it, if your account is configured to allow approvers.
- f. **Assign after** — This field is available only if two or more rows in the approval process have the same sequence number. You can use this field to escalate the approval automatically if the record or transaction is not approved or declined within the specified number of days after submission. OpenAir will route record or transaction automatically to the approver on this row if the previous approver with the same sequence number does not approve or reject the record or transaction. The previous approver can still approve or decline the record or transaction after the approval is escalated.

Note: The number of days specified in the **Assign after** field is always relative to the initial submission for approval. It is not relative to the previous escalation.

5. (Optional) **If approver is equal to submitter, send to** — Select an alternative approver in case any of the selected approvers is the same as the employee who submitted the record or transaction for approval, if self-approvals are not authorised.

Note: You can also set alternative approvers for each row (step 4c). Setting an alternative approver for the entire approval process is equivalent to setting the same alternative approver for each row.

6. (Optional) Check the **A sequence number requires only one approval** box if you have multiple approvers at the same approval level (with the same sequence number) but require only one of them to approve the record or transaction before it is routed to the next level.
7. Click **Save**.

Modifying an Approval Process

OpenAir lets you modify an existing approval process. Changes to the approval process will apply to the relevant records or transactions submitted after you modify the approval process.



Important: By default, OpenAir does not permit an approval process to be modified if there are one or more transactions progressing through this approval process. Modifying an approval processes while some transactions are still awaiting approvals may cause problems with progressing approval for these transactions.

To modify an approval process:

1. Go to Administration > Application Settings > [Select an application] > Approval processes > [Select an approval process].



Note: You can access the full list of approval processes defined for your account from any of the Expenses, Invoices, Opportunities, Purchases, Resources, and Timesheets application settings. The same approval process may be used for different record or transaction type across different OpenAir modules.

2. Make any changes as required following the same steps as for creating an approval process. See [Creating an Approval Process](#).
3. Click **Save**.

Service

Cancel
SAVE
SAVE & CREATE ANOTHER

New Service

Notes

Billing rates

Currency

USD

Hourly rate (money/hr)

Other rate

money/Day

Flat rate (money)

Other

☐ Taxable service
 ☒ Active service

Services are specific economic activities that you offer to clients that you use to invoice them. A Service can be set up to bill at an hourly rate; a set amount per day, or week, or month; or may be set as a flat rate. Services are available in the Timesheets, Projects (tasks, billing rules, and recognition rules), Invoices, and Opportunity applications.

If your system is set up to report time against a Client only or Client : Project, you may choose to have Services be entered as well as to identify the unique service being delivered. When reporting time against a Client : Project and Tasks, tasks may be set up with a service to be inherited by the time entry directly. You may opt to allow the employee to override the service by entering it on the timesheet.

Note: The name of this form is based on your company's terminology. Most companies use services or activities, but other terms are used. You can review and modify your company's terminology definitions in Global Settings. See [Interface: Terminology](#).

To create a Service:

1. Go to Administration > Application Settings > Timesheets Settings > Services.
2. Select **New Service** from the **Create Button**.
3. Enter the Service name.
4. Under Billing rates, select the Currency if you are using multi-currency in your environment. Choose how you would like to charge for this service: Hourly rate, Other rate (specified amount per time period), or Flat rate (for the entire service-fixed fee).

Note: You do not have to complete the billing rates section unless you have chosen to get billing rate from either Services or Services-Client. See [Billing Rates](#).

5. Optionally, you may choose a cost center for the service if your company has enabled using Cost Centers and has chosen Services as a Selected Item. See [Cost Centers](#).
6. You may also enter text to be used on proposals in the Opportunities application, if desired.
7. Select the check box for **Taxable service** if tax may be charged to the clients for this service. The tax rate used is based on [Tax Options](#) as well as [Invoice layout - Display, summary](#).

Time Types

Cancel
SAVE
SAVE & CREATE ANOTHER

New

Time type

☒ Active time type

☐ Allowed in schedules

Time type can be used as a reason in schedule request entries and schedule exceptions

☐ A task is not required for this time type

This applies to data entry on time off requests

Notes

You have the ability to create Time types to be used in the Timesheets application. Time types offer a way to segregate and categorize timesheet entries and can be determined by the employee when entering the time. Some common values are: Regular Time, Overtime, and Personal Time. You can also use time types to determine billable or non-billable travel, paid time off, or other time entry classifications that may affect billing or reporting.

This feature is useful when you have projects where you may need to identify the hours spent in the standard workday (e.g., 8 hours in the U.S.) and hours spent above the standard workday, due to a different billing rate or a contractual limit that can be charged to the client. Time types are useful for reporting on employee activities and utilization components.

To create a Time Type:

1. Go to Administration > Application Settings > Timesheets Settings > Time types.
2. Select **New Time type** from the **Create Button**.
3. Enter the Time type name.
4. Select the check box for **Allowed in schedules** if this time type is an option to use when entering time off requests and schedule exceptions.
5. Select the check box for **A task is not required for this time type** if this time type enables employees to enter time without designating a task as they might normally be required to do.
6. Notes may be added to describe this time type, if desired.

Note: There is a feature available to limit time types based on the Project selected for a time entry. To enable this feature, [Creating a Support Case](#) and request that the following switch be enabled: Allow time types to be limited by the project (mutually exclusive with the feature that allow time types to be limited by the task).

Notifications

The screenshot shows the 'Send a notification ...' configuration window. At the top are 'Cancel' and 'SAVE' buttons. The 'Send a notification ...' section has a dropdown 'When these conditions are met ...'. Below this, it states 'One or more conditions are required'. There are two conditions: 'Was approved by proxy' with a 'Yes' dropdown, and 'Client : Project' with an 'includes' dropdown and a search field. An 'Add row' link is present. The 'Notify' section shows a list of 'Available' recipients (e.g., '[Approver's department head]', '[Approver's manager's manager]', '[Approver's manager]', '[Approver]', '[Co-Approver]', '[Submitter's department head]', '[Submitter's manager's manager]', '[Submitter's manager]') and a 'Selected' list. There are buttons for 'Add selected >', 'Add all >', '< Remove selected', and '< Remove all'. Below this is a text field for 'External email addresses' with a note 'Separate multiple addresses with a comma' and a dropdown 'For email with multiple recipients:' set to 'Send each email separately'. The 'Email message' section has a 'Subject' field with 'Timesheet approved' and an 'Email body' text area with the message 'The timesheet "%name%", approved by %approved_by%, is approved'. At the bottom, there is a 'Field' dropdown set to 'Select...' and a 'Paste' button, with a note 'Select the field and click "Paste" to use it in the body'.

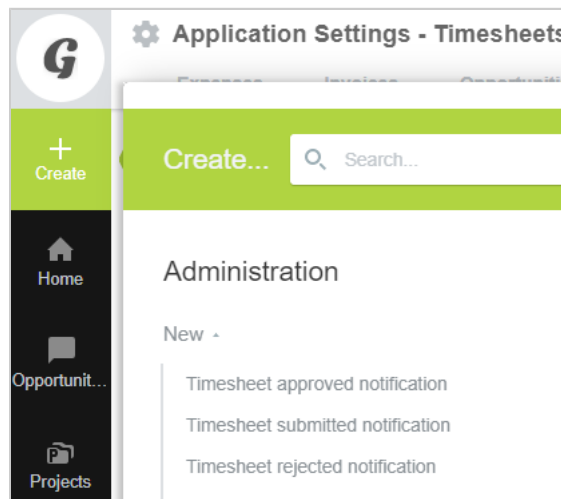
Timesheet email notifications are highly configurable in NetSuite OpenAir. You can send an email notification when any timesheet is submitted and approved as well as for timesheets submitted or approved by proxy. You can also send an email notification when specified conditions are met. You designate who receives the email notification and compose the actual email notification message.

To enable this feature, [Creating a Support Case](#) and request the following switch be enabled: Enable administration of notifications in the following application settings: Timesheets.

To create timesheet or time off request email notifications:

1. Go to Administration > Application Settings > Timesheets Settings > Notifications.

2. Select the notification type from the **Create Button**.



3. In the Send a notification... section, select either the type of new notification you are creating or when these conditions are met.
4. Proxy: Yes or No - Determines if this notification is used for regular or proxy submissions. For more information on Proxy, see [Proxy](#).
5. Click + to add a row and if you select the Client : Project option, you can use the Search function to select the actual Client : Project name from the pick list. Indicate whether the condition includes or excludes this Client: Project.
6. Under Notify, specify either individual email addresses or select employees from the Available employee selection box. You can also include external email addresses.
7. Under Message, enter the desired contents of the email to be delivered upon timesheet submission. Use the Field drop-down list to specify pre-set variables as part of the email notification. To do this, choose the variable from the drop-down list and click on the word **Paste** to insert the variable into the email body.
8. Click Save.

Timesheet Report Layout

Cancel **SAVE**

Edit

Date format
none (use default date format) ▼

Grid style
Thin grid lines ▼

Columns

Show these columns on the timesheet report

Date	▼	in column 1
Client	▼	in column 2
Project	▼	in column 3
Task	▼	in column 4
Description	▼	in column 5
Notes	▼	in column 6
Hours	▼	in column 7

Other

Additional text or HTML to print at the top of the timesheet report

Additional text or HTML to print at the end of the timesheet report

☐ Show gap hour summary by task

☐ Hide the time entry notes on the printable view

☒ Show the approval history

☐ Show the overlapping status of the timesheet in the header

Adobe Acrobat PDF settings

Page orientation
☒ Portrait ☐ Landscape

☐ Expand the page width to fit the timesheet report

Top margin
 0 ☒ All pages ☐ First page only

Font size
 10

Specify a top margin (in PostScript points) if printing on letterhead paper.
 72 points = 1 inch = 25.4 mm

The Timesheet report layout is what you would see if a timesheet were exported and printed as a PDF file, and the format displays on the approval screen for the timesheet approver. You tailor the Timesheet report layout to meet your company's needs. Select the Date format and Grid style. Select the particular fields that you would like to display on the timesheet report by choosing the field from the drop-down list in the related column. You may choose to add text or html at the top or end of the timesheet report. You can also configure Adobe Acrobat PDF settings.

To access and modify the Timesheet report layout:

1. Go to Administration > Application Settings > Timesheets Settings > Timesheet report layout.
2. Other options are available via check box selections: Show gap hour summary by task, Hide the time entry notes on the printable view, Show the approval history (recommended), and Show the overlapping status of the timesheet in the header (if you have allowed overlapping timesheets in your environment).

Note: Gap hour summary by task pulls in the computed gap hours (planned - worked) as tracked by tasks on the project. The printed version of the timesheet report is the same as displayed on the screen unless you chose to hide the time entry notes. You may want to select this option for printed versions to send to clients for physical signoff. The approval history is the audit trail of who has reviewed the timesheet and what action was taken.

- Finally, choose the Adobe Acrobat PDF settings you would like to use in your environment for clear printing.

Timesheet Rules

Cancel
SAVE

Submission rules

Active	Rule	Hours/Percent	Value	Action
<input type="checkbox"/>	Minimum number of hours required on the timesheet	Fixed hours		Error
<input checked="" type="checkbox"/>	Maximum number of hours allowed on the timesheet	Fixed hours	168	Error
<input type="checkbox"/>	Minimum number of hours per day required on the timesheet	Fixed hours		Error
<input checked="" type="checkbox"/>	Maximum number of hours per day allowed on the timesheet	Fixed hours	24	Error
<input checked="" type="checkbox"/>	Minimum leave accrual balance		8	Warn
<input type="checkbox"/>	Require a time entry every day, independent of workschedule			
<input type="checkbox"/>	Exclude weekends from the daily rules			
<input type="checkbox"/>	Ignore rules on submission of timesheets with individually rejected time entries			
<input type="checkbox"/>	Exclude hours associated with cost centers from the daily rules			> Create
<input type="checkbox"/>	Exclude days with no hours from the daily rules			
<input type="checkbox"/>	Require project selection for the following time types			> Create
<input type="checkbox"/>	Do not allow submissions with time booked to inactive client			
<input type="checkbox"/>	Do not allow submissions with time booked to inactive project			
<input type="checkbox"/>	Do not allow submissions with time booked to inactive time type			
<input type="checkbox"/>	Do not allow submissions with time booked to inactive service			
<input type="checkbox"/>	Do not allow submissions with time booked to inactive job code			
<input type="checkbox"/>	Do not allow submissions with time booked to inactive payroll type			

Messages

Minimum leave accrual balance

This timesheet would create a "%leave_accrual_rule.name%"

Options

☐ Create a new timesheet when a timesheet is submitted. Leave the hours the same

☐ Late timesheet alert for rejected timesheets

Timesheet rules are a way of putting policy around timesheet submissions. There are a number of Submission rules you can activate. These are:

- Minimum number of hours required on the timesheet
- Maximum number of hours allowed on the timesheet
- Minimum number of hours per day required on the timesheet
- Maximum number of hours per day allowed on the timesheet


- Minimum leave accrual balance, and Exclude weekends from the daily rules

The first four of these require you to select whether to choose fixed hours or a percentage of the work schedule as the base for the rule. Selecting the percentage of the work schedule is helpful when you are establishing a policy that spans full-time and part-time employees.

You also need to specify the value for the item as well as the Action (Warn or Error) when the rule is violated. For the Minimum leave accrual balance, you need to select the minimum value and the Action to be sent to the employee.

Other options include:

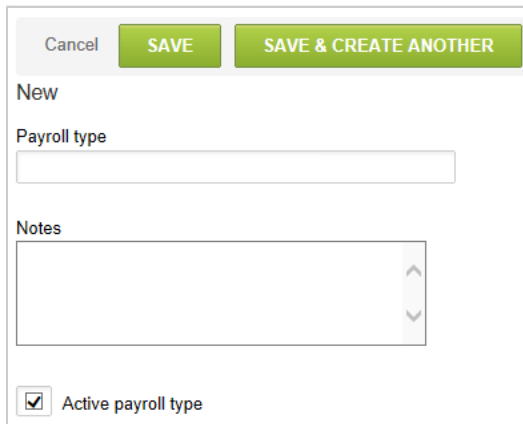
- **Require a time entry every day, independent of workschedule** — enables you to require employees to enter time on Saturday and Sunday, for example.
- **Exclude weekends from the daily rules** — permits weekends on timesheets to pass through timesheet validation without triggering an exception for either the minimum number of hours per day required on the timesheet or maximum number of hours per day allowed on the timesheet rules.
- **Exclude hours associated with cost centers from the daily rules** — If you are using the timesheet rules to monitor minimum and maximum hours per day and cost centers are used to classify employees, this option lets you filter the timesheet daily rule for only those cost centers where the rules apply. For example, you may want to not apply the rules to the sales cost center.
- **Exclude days with no hours from the daily rules** — permits blank days (i.e., days with no hours) on timesheets to pass through timesheet validation without triggering an exception for either the minimum number of hours per day required on the timesheet or maximum number of hours per day allowed on the timesheet rules.
- **Require project selection for the following time types** — permits time types to control whether a project is required for timesheet submission. For example, you may have a time type called internal that, when selected, will not require a project selection for time entry. Recording time at the time type level only will not provide a service or task breakdown; therefore, a high level single time type value will have limited reporting capabilities. A good example of a time type that would be useful on its own would be bench time. Please note that this feature is only applicable if you do not require a project selection on all time entries, and it is not commonly used.

 **Note:** The timesheet rules applied in your environment do not execute until the timesheet is submitted for review. Up until the point of submission, timesheet entries saved on a timesheet are not checked against the rule. Therefore, employees may think they have a valid timesheet while it is still in the open timesheet stage.

To create or modify the Timesheet Rules:

1. Go to Administration > Application Settings > Timesheets Settings > Timesheet rules.
2. The Messages area provides a standard message to the employee when time entries for leave exceed the minimum balance specified in the Minimum leave accrual balance in the section above. Fields identified with %% are standard OpenAir database fields. Additional fields may be added by looking up the field format. Email templates provide an user interface to help interpret the field format. See [Email Templates](#).
3. An option to Create a new timesheet when a timesheet is submitted is also available. The options accompanying this feature are the same provided to employees when they choose to copy a timesheet. You should select the option most aligned with your business. For example, Clear the hours is a popular selection.
4. There is also a check box that controls whether or not an alert for rejected timesheets is included in the late timesheet alert notifications.

Payroll Types



Cancel SAVE SAVE & CREATE ANOTHER

New

Payroll type

Notes

☒ Active payroll type

OpenAir offers the capability of creating Payroll types for use in the Timesheet application. This is an additional attribute that can be input on the time entry. The general use is to determine regular or overtime work when time types are used for a different purpose. Payroll types have more limited functionality in the rest of OpenAir than time types.

To create a Payroll Type:

1. Go to Administration >Timesheets Settings > Payroll types.
2. Select **New Payroll type** from the **Create Button**.
3. Enter the Payroll type name and any Notes describing the use of this payroll type.

Time Off Request Layout

Cancel **SAVE**

Edit

number prefix: SR- Starting #: 1 Grid style: Thin grid lines

Date format: none (use default date format)

☒ Include description on time off request

☐ Include signature line on time off request ☒ Show the time off request approval history

Notes

Location of notes: ☐ Header ☒ Footer

Includes the notes below, the time off request notes

Additional notes (plain text or HTML) to print on time off requests

Columns to display for each schedule request entry on the time off request

Available	Selected
Item	Item
Date	Date
Time type	Task
Client	Description
Project	Hours
Service	
Task	
Hours	
Description	

Add selected > < Remove selected
Add all > < Remove all

You can tailor the Time Off Request report viewed by approvers to meet your company's needs. You are able to select the prefix of all generated time off requests and starting time off request number. **SR-** is the default prefix and starting number defaults to 1.

To access and modify the Time off request layout:

1. Go to Administration > Application Settings > Timesheets Settings > Time off request layout.
2. Select the Grid style using the drop-down list as well as the Date format.
3. Select the desired check boxes that determine whether to include a description on time off request, signature line on the time off request, and if you would like to show the time off request approval history.
4. Add notes in the header or footer besides the notes on the time off request, if desired.
5. Choose the particular fields that you would like to display on the time off request from the Available Columns and move them to the Selected Columns.
6. Finally, choose the Adobe Acrobat PDF settings you would like to use.

Note: To filter the number of time types, projects and/or tasks that an employee sees for a time off request, use the filters for **Limit lists that appear on form**. This prevents employees from seeing the complete list of projects and tasks they would see when entering a timesheet.

Add a Save & Submit Button on Time Off Requests

When this feature is enabled, a "Save & Submit" button is added to time off request forms. This button allows users to submit a time off request as soon as they save it. The form retains the "Save" button, which saves a time off request without submitting it.

To enable this feature, go to Administration > Application Settings > Timesheets Settings > Other Settings and select the "Enable the "Save and Submit" button on timesheets and time off requests" setting.

The screenshot shows the 'Time off request' form for SR-484. At the top, there are buttons for 'View time off request', 'Edit time off request', and 'Submit/Approve'. Below this is a modal window titled 'Edit time off request'. Inside the modal, there is a header bar with 'Cancel', 'Delete', 'Save & Submit' (highlighted with a red box), and 'Save' buttons. The main content area is titled 'General' and contains the following fields:

Employee	Date (MM/DD/YY)	Time off request #
Marc Collins	02/23/17	SR-484

Approval Status	Date submitted	Date approved	Start date (MM/DD/YY)	End date (MM/DD/YY)
Open	no value	no value	02/23/17	02/24/17

Time type *
 Non-billable

Client : Project *
 Honeycomb Services : Time off

Task *
 2: Vacation

Leave Accrual Rules

Cancel
SAVE
SAVE & CREATE ANOTHER

New leave accrual rule

Name

Accrual

Period
Monthly
Hours per period
Accrual timing
☒ Start of the period
☐ End of the period

Cap (hours)
Lose accrued time
☒ Never
☐ Employees anniversary date
☐ End of the year
December
31
Use period ending Feb 29th to indicate last day of February

Grace period (days)
Delay loss accrual (days)

Carry over (hours)
☐ Apply only to grace period
Number of hours allowed to carry over to subsequent year. If applied only to grace period, carry over hours will be available during the grace period and expire thereafter.

☐ Include partial accruals
Start or end date for employees that fall within a period are calculated on a prorated daily basis

☐ Consider the exact number of days in a month for partial accruals.
Apply after: 10/18/13
In partial calculation of transactions or on prorated basis setting the calculation consider the exact number of days in a month (for example 31 days in January, 28 in February). Otherwise system will use 30 days. Requires the 'Include partial accruals' checkbox.

☐ Create transactions for users only during dates where they are assigned to the rule. Apply after: 10/18/13
All the accruals/draw-downs will only be created against this leave accrual rule if created during the duration a leave accrual rule is associated with an employee. Transactions created after the rule ends for an employee will be created against the next leave accrual rule its balance transfer progression If this is the last leave accrual rule in a transfer progression for an employee, the setting is ignored.

☐ Allow transfers of negative leave accrual balances. Only consider transactions with dates after: 10/18/13


Leave accruals rules provide a structure around how time off is handled in OpenAir, i.e., vacation and personal time off. First, you set up Leave accrual rules to document each type of time off accrual your company recognizes, and then you associate them to individual employees that receive that benefit within the company.

To create a Leave accrual rule:


1. Go to Administration > Application Settings > Timesheets Settings > Leave accrual rules.
2. Select **New Leave accrual rule** from the **Create Button**.
3. In the Accrual section, select the Period, Hours per period, Accrual timing, and the maximum Cap (hours) for the accrual. Each time the rule is executed, the period is referenced to determine if

the hours per period should be added to the accrual amount, which results in a Leave Accrual Transaction to be generated. When the Cap of hours has been reached, the rule does not create any more transactions for that defined period.

4. Next, choose one of the **Lose accrued time** options. Enter the Grace period (days), Delay loss accrual (days), and Carry over (hours), and the Apply only to grace period check box to only have the carry over hours applied to the grace period, if desired.

 **Note:** When the rules are executed, the lose accrued time option is considered, which creates drawn-down transactions to zero out the balance of any accrual that are past the deadline for use. For example, if 40 hours remains in the employee's account and the lose accrued time option is December 31, then on January 1 the rule creates a negative 40 hours draw-down transaction to expire the accrued time balance. The Grace period and Delay loss accrual options provide another level of definition related to your time off policy since the lose accrued time options are limited. If your company observes a carryover option, then the rule can be configured with this number of hours (days) for carry over which may also be limited only to those hours (days) carried over into the grace period.


5. For employees that start during a mid-accrual period such as a mid-month hire or mid-year hire, checking the **Include partial accruals** option lets the rule automatically calculate a prorated amount of accrual based on hire timing.
6. Set the **Consider the exact number of days in a month for partial accruals** to base calculations for partial accruals on the exact number of days in any particular month.
 - If this option is selected, the partial transactions and prorated accrual calculation considers the exact number of days in each month (for example 31 days in January, 28 in February).
 - If this option is not selected, the partial and prorated accrual calculation is based on an average 30-day month.
 - This setting requires the **Include partial accruals** checkbox to be selected.

 **Important:** It is very important to set the "Apply after" date to exclude old transactions. In most cases the date should be set to the day that the option is being activated, so that it doesn't affect anything in the past.

7. Set the **Create transactions for employees only during dates where they are assigned to the rule** option to create closed accrual leave periods.

Closed accrual leave periods can be created to prevent leave accrual transactions from being drawn-down against a closed period.

- All the accruals/draw-downs will only be created against this leave accrual rule if created during the duration a leave accrual rule is associated with an employee.
- Transactions created after the rule ends for an employee will be created against the next leave accrual rule its balance transfer progression. If this is the last leave accrual rule in a transfer progression for an employee, the setting is ignored.

 **Important:** It is very important to set the "Apply after" date to exclude old transactions. In most cases the date should be set to the day that the option is being activated, so that it doesn't affect anything in the past.

8. Set the **Allow transfers of negative leave accrual balances** to enable the transfer of negative balances to the next accrual rule.



Important: It is very important to set the “Apply after” date to exclude old transactions. In most cases the date should be set to the day that the option is being activated, so that it doesn’t affect anything in the past.

9. From the Draw-down section, select how entered time is applied against the leave accrual: by Time type, Service, Project, or Task. These items are typically associated with a Time off or PTO project that has been set up within the Projects application. Indicate when the draw down is generated, either when the Leave accrual is run or A timesheet is approved.

Draw-down

An approved time entry that matches all of the filter conditions will generate a draw-down.

Time type > [Create](#)
Service > [Create](#)
Project > [Create](#)
Task > [Create](#)

Generate the draw-down when

☒ Leave accrual is run

☐ A timesheet is approved

☐ Modify draw-downs when an approved timesheet is changed
Draw-downs will be deleted if a timesheet is un-approved.



Note: As a system administrator, you can set Leave accrual rules to run on a schedule or run them manually.

10. You are able to Modify draw-downs when an approved timesheet is changed by selecting the check box : A timesheet is approved.



Note: If you select the **A timesheet is approved** option, draw-down transactions are created immediately upon timesheet approval. As timesheets may be unapproved for corrections, review the Timesheets Settings > Other settings to determine whether the leave accrual transactions will auto-adjust or require manual interaction for corrections based on timesheet changes. See [Other Settings](#).

11. Finally, Enter any Notes (if desired), and whether you want to Exclude inactive employees via the check box when the rule is run.
12. Click Save.

To associate rules to an employee:

1. Go to Administration > Global Settings > Employees. Select a Employee ID.
2. Click on the Leave accrual link. See [Leave Accrual](#).
3. For each applicable rule, select the rule and enter the Start Date and End Date into the leave accrual row. When the rules are run, employees with the defined rules will have their accruals and draw-downs adjusted per the rule definitions. Each rule is named and includes the following:
 - Accrual definition
 - Draw-down definition

Note: Editing existing leave accrual rules may affect existing historical balances of your employees. If you need to change your policies, we recommend that you contact OpenAir Support or engage the assistance of a Professional Services Consultant.

Run Leave Accruals

The Run leave accrual form provides you, the System Administrator, with the ability to run the defined Leave Accrual rules on demand or have them scheduled to be run on a regular basis. When you set up the leave accrual rules, you determine how running leave accruals impacts leave accrual balances. Draw-down transactions are created by the run leave accruals action if the rules have defined this as the method to create the transactions. Otherwise, approved timesheets automatically create the transactions so draw-downs and balances are current.

To Run leave accruals:

1. Go to Administration > Application Settings > Timesheets Settings and select the link to Run leave accruals. The Run leave accrual form provides the ability to run defined Leave Accrual rules on demand or have them scheduled to be run on a regular basis.

Cancel SAVE

Status

Leave accrual was run at 10/10/12 08:00 PM

Run leave accrual

☐ Run leave accrual now

☒ Automatically run leave accrual

Day: Every day at Hour: 8pm Minute: 00

Times are in U.S. Eastern Time

Leave Accrual Form - Timesheets Application

Cancel SAVE SAVE & CREATE ANOTHER

New leave accrual transaction

Type
☒ Accrual ☐ Draw-down

Date (MM/DD/YY) Hour(s)

Employee
 Collins, Marc

Leave accrual rule
 Corporate sick days

Notes

To use this feature, you must enable the Timesheets Settings switch: Enable the leave accrual feature. To do so, go to Administration > Application Settings > Timesheets Settings > Other settings. See [Other Settings](#).

When the leave accrual feature is enabled, a Leave accrual tab displays in the Timesheets application.

Leave Accruals provide a method of tracking and maintaining employees' time off within OpenAir. Time can be accrued or earned as a specific type of time off which may then be drawn down when taken or used by the employee. You can enter manual Leave accrual transactions or specify Leave accrual rules for employees to automatically compute time off amounts. See [Leave Accrual Rules](#).

Although manual transactions are allowed, the key to a successful implementation of the Leave Accrual feature is the setting up of rules, which are then applied to employees. The rules control the accrual amounts and draw-down specifics depending upon the rule setup for Time Type, Service, Project, or Task.

To create a New leave accrual transaction:

1. Go to Timesheets.
2. Select **New transaction** from the **Create Button**.
3. Select the Type, either Accrual or Draw-down.
4. Enter the Date and Hours for the transaction.
5. Select the Employee for which this leave accrual transaction applies and the Leave accrual rule. If you have not previously created rules, see [Leave Accrual Rules](#).
6. Add notes as desired.
7. Click Save.

Alerts

This functionality lets you send automated email reminders to ensure that company policies are followed, time is entered and submitted on time, and approvals are completed. Multiple alerts of each type can be set up to meet varying business needs. Refer to the following types of alerts.

- **Timesheet alerts** — can be configured by administrators to alert employees about late timesheets, overdue approvals or unsaved time entries.
- **Late timesheet alerts** — are used to notify employees when timesheets meeting certain criteria are late. To ensure accuracy and timeliness in billing, most companies find it critical to get timesheets in on time. Late timesheet alerts are the most commonly used alerts.
- **Overdue approval alerts** — are useful for managers who must approve time, but who may not be regular employees of OpenAir. An overdue approval alert can remind those employees who do not log in regularly that there are timesheets in the system waiting on them for approval.
- **Unsaved time entry alerts** — are most often used in companies where time must be entered on a daily basis. These alerts can be used to remind employees on a periodic basis that time entry is due.

To create a timesheet alert:

1. Navigate to Administration > Application Settings > Timesheets Settings > Alerts.
2. Select the type of alert you want to create from **Create Button**. The corresponding alert form will open.
3. Name the alert.
4. Under Alert runs on, select the day and time when the Alert should run.
5. Under Rule, define the appropriate selection rules for why the employees would receive an alert and which employees will receive alerts.
6. Use Email notification, define the email sender, subject and text, and decide whether to copy other employees on the alert email.
7. Add notes, as desired. These notes do not appear anywhere in the alert; they are for informational purposes, such as to remember why the alert was created.
8. Select Active alert to make this alert active.
9. Click Save.

Other Settings

The Timesheet application has many configurable parts including add-on functionality and interaction with how you are performing your resource and project management. Many timesheet options depend on whether other features are activated.

To access the Timesheet Other settings:

1. Go to Administration > Application Settings > Timesheets Settings > Other settings.

Timesheet Duration: Timesheet entry is defaulted to a single time period for submission (as selected from the drop-down list). This duration can be overridden on the Employee Demographic form if you have different offices or departments that adhere to different time policies. To enable the override on an employee basis, [Creating a Support Case](#) and request the following switch be enabled: Allow the Timesheet duration to be set at the employee level.

Location of the "Save" button on the grid: When your employees have created a timesheet, the timesheet displays allowing data entry. Employees have the ability to save in-progress timesheets and edit them later before completing submission. You have the ability to place where the save button appears on the timesheet. This setting cannot be overridden by an employee preference although employees do have the ability to add additional save buttons to the top right of the forms.

Number of rows to display in timesheets notes fields: Each time entry cell has a blue dot adjacent to it which, when selected, displays a pop-up window that includes a description and a notes field. The number of rows selected for this option reflects the number of lines displayed in the notes area of the pop-up window. This is not a data entry restriction value, only a display value before you must scroll down should the employee have entered more information than can be displayed.

Width of the hourly cells on a timesheet: The time entry cells within a timesheet must be at least 2 digits wide to accommodate a time entry. Depending on how many digits you expect to be entered on a regular basis, you may want to increase the value to 3 or 4.

Show the time type drop-down on the main worksheet: Time types are used to identify types of time entries such as leave time, holiday, billable, shift work, etc. If your company has decided to use time types, then this feature should be activated to capture the time type value during timesheet entry. If your time types are limited to use within an employee's work schedule (such as holiday or outages), then it may not be necessary to display the field on timesheet entry as the work schedule would handle tracking of the time type value. See [Time Types](#).

Hide the time type drop-down in the popup window: The notes option next to each time entry cell displays a time type drop-down menu unless this option is selected. There is no dependency with the time type being viewable on the timesheet.

Show the client/project drop-down on the main worksheet: When selected, the employee can enter time against a specific Client : Project combination (or just client if the options to view client only in drop-downs has been selected). The list of projects displayed is controlled by project viewing options such as all projects, specific projects, assignments, ownership, and bookings.

Show the client/project and the task drop-down on the main worksheet: When selected, an additional field for task is displayed along with the Client : Project drop-down list. The list of tasks displayed is controlled by project assignment and booking options.

Show the service drop-down on the main worksheet: Services are specific activities that you offer to clients which may be used to invoice your clients or used for finance account allocation. In some accounts, they are called activities. If your company has decided to use services, there are many areas throughout OpenAir where the services value can be set as a default for timesheets. See [Service](#).

Activating this feature supplies another field containing the service values on the timesheet, which give control to the employee for selecting the proper value. The ownership of the field setting should be reviewed according to how the Service field is used throughout the system. If it is used to perform billing or allocations to financial accounts, you may prefer to have the field setting controlled by the project setup process and not overridden by the end-employee.

Show the payroll type drop-down on the main worksheet: If your company has decided to use payroll types, activate this feature to allow entry by the employee on timesheets. If not enabled, and your account uses payroll types, they display in a list in the Notes pop-up window. See [Payroll Types](#).

Show the Project job code drop-down on the main worksheet: Job codes classify employees into general job positions defined by your company. See [Job Codes](#).

Show time remaining estimate input on the main worksheet: When selected, the **System estimate (hrs)** field shows the latest estimated hours value for the task, minus the hours entered against it in the timesheet.

Require a time type on time entries: If you have implemented time types and displayed them for entry on the timesheet, this option lets you make this field mandatory for all employees. This requires you to define a complete set of time types so that a valid value is always able to be selected for any type of time entry. This option is dependent on the **Show the time type drop-down on the main worksheet** option being selected. If the show time type option is not active, this option has no system impact.

Require a client/project on time entries: If you have displayed Client : Project (and possibly clients only depending on the show client name option) for entry on the timesheet, this option will allow you to make

this field mandatory for all employees. This option is dependent on the **Show the client/project drop-down on the main worksheet** option being active. If the show client/project option is not active, this option has no system impact.

Require a service on time entries: If you have implemented Services and displayed them for entry on the timesheet, this option lets you make this field mandatory for all employees. This option requires you to define a complete set of services so that a valid value is always available to be selected for any type of time entry. See [Service](#).

Require a description on time entries: The description field is an additional field to the notes field that is available for each time entry cell by selecting the dot next it. Setting this option requires the entry of a description for each entry on a timesheet.



Important: This impacts the time it takes to enter data should employees be required to enter multiple time entries for projects across multiple days of work.

Require a payroll type on time entries: If you have implemented payroll types and displayed them for entry on the timesheet, this option lets you make this field mandatory for all employees. This will require you to define a complete set of payroll types so that a valid value is always available to be selected for any type of time entry. See [Payroll Types](#).

Require a task on time entries: If you display a task for entry on the timesheet, this option lets you make this field mandatory for all employees.

Show only clients and projects with open tasks assigned to the employee: Tasks have an open/closed flag to provide Project Managers control over completed or in-progress service on a project. Depending on how you are assigned or allocated to projects and tasks for time entry, the activation of this option shows only Client : Project with open tasks available for time entry.

Show only clients and projects with open tasks booked to the employee: Tasks have an open/closed flag to provide Project Managers control over completed or in progress service on a project. Depending on how you are booked to projects and tasks for time entry, the activation of this option shows only Client : Project with open tasks that you are booked for available for time entry. If this option is not enabled, then any Client : Project with tasks booked to you for time entry is displayed including those with all closed tasks. This, in turn, enables the entry of time against closed project tasks.

Display schedule exception information from the associated company work schedule of the timesheet employee: This option lets you display any schedule exceptions within the timesheet. These are most often company holidays on the company work schedule. The display is handled by highlighting the date column title in the timesheet and adding a footnote indicator, which is defined in the Tips area of the OpenAir page. The footnote definition is taken from the description field of the schedule exception.

Display schedule exception information from the work schedule and associated company work schedule of the timesheet employee: This option lets you display any schedule exceptions within the timesheet. These are most often company holidays on the company work schedule. Other exceptions noted in the employee's personal calendar, such as vacation or leave time, are displayed as well. The exception information is derived from any schedule exceptions input on the company workschedule associated to the employee record, as well as any exceptions input on the employee's personal work schedule directly on the employee record. The display is handled by highlighting the date column title in the timesheet and adding a footnote indicator, which is defined in the Tips area of the OpenAir page. The footnote definition is taken from the description field of the schedule exception.

Allow an approver to edit a submitted timesheet: When timesheet approvals are used, timesheets are submitted for review by a defined employee or set of employees (approval process) who can then approve or reject the timesheet. To avoid time delays introduced by having a reviewer reject a timesheet then the owner fixing and resubmitting the timesheet, activating this option gives the reviewer the ability to edit the timesheet entries directly before continuing with the approval.

Hide the description field: The description field is available for each time entry cell by selecting the dot next to it. Setting this option hides the description field from the pop-up window when the dot is selected, but still displays notes and any other field settings that have been configured. If this option is set, it overrides the "Require a description on time entries" setting.

Remove blank timesheet rows: This option will remove blank (empty) timesheet rows from the display and the Timesheet report.

Preserve row ordering: Activating this option keeps the time entry rows in the order in which they were entered on the timesheet and does not resort them in alphabetic client or project order.

Enable the "Hours remaining" on tasks estimating feature: Hours remaining are only available if you are assigning employees to individual tasks with an estimate of planned hours/days for each employee on the task. Without this level of project/task information, the hours remaining feature is unable to allocate hours to individuals on timesheet review. When this feature is activated, a new link displays within the timesheet called Hours Remaining. Selecting this link displays to the employee the remaining hours for the task and provides the ability to change the hours remaining value. This adjusts the remaining and estimated hours of the project task within the project plan. There is no impact on the planned hours. Tasks must be displayed on the timesheet in order for this option to work.

Require "Hours remaining" estimates for all tasks: Hours remaining are only available if you are assigning employees to individual tasks with an estimate of planned hours/days for each employee on the task. Without this level of project/task information, the hours remaining feature is not able to allocate hours to individuals on timesheet review. When this option is activated, a new link displays within the timesheet called Hours Remaining. Selecting this link displays to the employee the remaining hours for the task and provides the ability to change the hours remaining value. This value is required for each task identified on the timesheet. Any changes adjust the remaining and estimated hours for the task within the project. There is no impact on the planned hours. The **Enable the Hours remaining** option must be activated and tasks displayed on the timesheet for this option to be available.

Use the system estimate if "hours remaining" are not entered: Hours remaining are only available if you are assigning employees to individual tasks with an estimate of planned hours/days for each employee on the task. Without this level of project/task information, the hours remaining feature is not able to allocate hours to individuals on timesheet review. When this option is activated, a new link displays within the timesheet called Hours Remaining. Selecting this link displays to the employee the remaining hours for the task as estimated by the system (or the value entered by the Project Manager). A timesheet employee may enter a new value or choose to leave the field blank. A blank entry uses the system estimated value (or the value entered by the Project Manager) of the hours remaining for time entry on the task. This adjusts the remaining and estimated hours within the project task on the project. There is no impact on the planned hours. The Enable hours remaining option must be activated and tasks displayed on the timesheet for this option to be available.

Get the service from the task if not selected: This option is dependent on the display of the Service field on the timesheet main. If you have not made this field required, employees may optionally leave the field blank. When activated, this feature ensures every time entry has a Service by obtaining the value from the task if the employee does not override the value in the timesheet. If this option is not activated, then "blank" Service values can be entered against the task. Tasks must be enabled on Projects in order for this option to be available.

Always get the service from the task: If your company uses Services within the system but does not allow employees to override the value on the timesheets, use this option to ensure the timesheet entry obtains the appropriate service from the project task. Tasks must be enabled on Projects in order for this option to be available. We recommend that services on tasks be required if this setting is enabled.

Do not allow timesheet submission if time is booked to an inactive option: Employees entering time against Client : Project (or Clients, and possibly at the task level), are provided a drop-down list of these items based on the timesheet options, such as displaying only Client : Project with open tasks. This option prevents the submission of a timesheet if the employee was able to view a Client : Project task when the timesheet was created, but later the Client : Project was inactivated before the timesheet is completed.

and submitted. If this option was not selected and the Client : Project has been inactivate during the span between timesheet creation and submission, time is allowed to be entered against an inactive project since the timesheet was already in progress.

Do not allow timesheet submission if time is booked to a closed task: Employees entering time against Client : Projects (or Clients, and possibly at the task level), are provided a drop-down list of these items based on the timesheet options, such as displaying only Client : Projects with open tasks. This option prevents the submission of a timesheet if the employee was able to view a Client : Project task when the timesheet was created, but later the Task was closed before the timesheet was completed and submitted. If this option is inactive, time is allowed to be entered against closed tasks provided the task was open when the timesheet was created.

Do not allow timesheet submission if time is not booked to a task: This option prevents a timesheet submission if a time entry is not recorded to a task on a project. We recommend that you enable this option if you are tracking time to the task level.

Enable the time type default when creating a new timesheet: When creating a Timesheet, the timesheet form asks for basic information such as the period date. This option provides the employee a default Time type field, which pre-populates all timesheet rows with the selected time type value. This option is dependent on having time types enabled in the system. It is useful when the option to enter time types on the timesheet has been activated.

Enable the client:project default when creating a new timesheet: When creating a timesheet, the form asks for basic information such as the timesheet start date. This option also provides the employee a default Client : Project field, which pre-populates all timesheet rows with the selected Client : Project value. It is useful when the option to enter Client : Project on the timesheet has been activated.

Enable the service default when creating a new timesheet: When creating a timesheet, the timesheet form asks for basic information such as the timesheet start date. This option also provides the employee a default service field, which pre-populates all timesheet rows with the selected service value. This option is dependent on services being used in the system and is useful if the option to enter service on the timesheet has been activated. See [Service](#).

Enable the payroll type default when creating a new timesheet: When creating a timesheet, the timesheet form asks for basic information such as the timesheet start date. This option also provides the employee a default payroll type field, which pre-populates all timesheet rows with the selected payroll type value. This option is dependent on payroll types being used in the system and is useful if the option to enter payroll types on the timesheet main grid has been activated. See [Payroll Types](#).

Enable time off requests: The time off request feature enables the submission of schedule changes such as vacation, training, leave time, etc. A number of options exist that allow the time off request feature to be used as an employee scheduling tool, a leave time tracking tool, and so forth. Activation of this feature displays another tab within the Timesheet application called Schedule Requests, which can be created and submitted/approved through an approval process. Time off requests interact with timesheets, a employees work schedule, and resource booking according to the various options selected within the Settings form.

Require a time type on time off requests: If you have implemented time types and activated time off requests in your environment, this option lets you make this field mandatory for all employees. This requires you to define a complete set of time types so that a valid value is always able for selection on any type of time entry.

Require a client/project on time off requests: If you have implemented project-based time tracking and activated time off requests, this option lets you make Client : Project selection mandatory for all employees. Such a Client : Project selection is typically something along the lines of [Company Name] : PTO project.

On time off requests, show only clients and projects with open tasks assigned to the employee: This option, when time off requests are active, prevents an employee from entering a time off request

against a project that has closed tasks. For employees to see projects with open tasks, the employee must be assigned to either the task or the project depending on the assignment options active in your account.

On time off requests, show only clients and projects with open tasks booked to the employee: This option, when time off requests are active, prevents an employee from entering a time off request against a project that has closed tasks. For employees to see projects with open tasks, the employee must be booked to either the task or the project depending on the assignment options active in your account.

Require a service on time off requests: If you have implemented services and activated the time off request function, you may require an employee to select a service. The service value entered in the time off request overrides the timesheet default value for the project/task (set within the task) if you include the time off request on your timesheet. If you allow employees to override the service on the timesheet, then the default value displays from the time off request included on the timesheet.


Require a task on time off requests: If you have implemented project-based time tracking and activated time off requests, this option lets you make the Task within a Client : Project selection mandatory for all employees. This option is helpful for time tracking where you are including a variety of choices within a single project (e.g., time off categories such as vacation, jury duty, sick time, and family leave).

Hide the related time off request entry information on the timesheet: If your process is to have employee enter their time directly within timesheets regardless of the service or pre-approval of time (time off requests), then time off requests can be hidden from timesheets.

Do not allow time off request submission if time is booked to an inactive option: Similar to the “show only open assigned tasks on time off requests” feature, this option lets you stop time off request entry against any tasks or projects have been closed while the time off request was being created. This is recommended to be activated if you have enabled the open assigned task option.

Allow an approver to edit a submitted time off request: When time off request approvals are used, time off requests are submitted for review by a defined employee who then approves or rejects the time off request. To avoid time delays introduced by having the reviewer reject a time off request and then the owner fixing and resubmitting the time off request, activating this option gives the reviewer the ability to edit the time off request entries directly before continuing with an approval. The approver of the time off request is set on the employee record.

Automatically create schedule exceptions when a time off request is approved: Schedule exceptions are entries in the employee's personal work schedule or calendar that identify special work schedule situations such as holidays or vacation. Allowing an approved time off request to create an exception automatically adjusts the employee's calendar to remove time off request dates from available hours in the work schedule. Selection of this option impacts how utilization is computed if you have selected Work schedule hours as the denominator in the utilization calculation.

 **Note:** This is mutually exclusive with the following switch: Automatically create bookings when a time off request is approved.

Allow modification and deletion of schedule exceptions created automatically from an approved time off request: Schedule exceptions are entries in the employee's personal work schedule or calendar that identify special work schedule situations such as holidays or vacation. Allowing the schedule exceptions within the employees calendar to be modified enables adjustments to the employee's available hours. This may impact how utilization is computed if you have selected Work schedule hours as the denominator in the utilization calculation.

Automatically create bookings when a time off request is approved: If you are using bookings in the [Resources](#) application to manage your resource allocations and available hours, an approved time off request may create bookings automatically to allocate the employee to the identified Client : Project (and Task if required in your environment). If this is not selected, then approved time off requests create an exception to the employee's calendar instead of a booking.

Note: This is mutually exclusive with the following switch: Automatically create schedule exceptions when a time off request is approved.

When creating a timesheet, automatically create time entries for bookings: If you are managing resource allocation with bookings, then you may choose to have employee timesheets prepopulated with the booking hours. This provides information to the employee of expected work for the defined timesheet period. The entry can be modified to reflect the actual effort performed. When using this option, ensure you are educating your staff on validating the booking entry and not to simply save the prepopulated timesheet.

The feature can also be used to update time entries every time the timesheet is accessed with data from bookings of selected types. To set how time entries are created or updated based on bookings, go to Administration > Application Settings > Timesheets > Timesheet rules.

Time entries from bookings

When creating time entries from bookings: Leave the hours the same

Don't update time entries for selected booking types:

Available	Selected
Open	
Pending	
Tentative	
Confirmed	
Rejected	

Add selected > < Remove selected
Add all > < Remove all

☐ Update time entries from bookings everytime a timesheet is accessed.

When creating a timesheet, automatically create time entries for approved time off requests: Time off requests that capture time against a Client : Project (and Task if required in your environment) can be automatically inserted into an employee's timesheet to allow quicker timesheet entry. The time off request appears as the timesheet is created. The values of the time off request hours may be modified prior to timesheet submission. If the timesheet already exists, this option does not add the time off request into the timesheet automatically - a manual entry is required on the timesheet.

When automatically creating time entries for approved time off requests when creating a timesheet, get missing values from the time off request: Time off requests that capture time against a Client : Project (and Task if required in your environment) can be automatically inserted into an employee's timesheet to allow quicker timesheet entry. The time off request appears when the timesheet is created. The values of the time off request hours may be modified prior to timesheet submission.

Allow time off requests with time entries on approved timesheets to be un-approved: The correction of a time off request can still be performed if this option is enabled and the time off request has already been added to timesheets. Without this option, modifying the time off request is disabled if you have allowed the time off request to be included in a timesheet.

Do not allow editing of the timesheet name: This option generates a standard timesheet name when the timesheet is created (i.e., "Timesheet 06/03/12 to 06/10/12") that cannot be changed by the employee. If this option is not selected, an employee has the ability to modify the name of the timesheet at timesheet creation or while the timesheet is in the Open status via the edit link.

Disable overlapping timesheets: The necessity for overlapping timesheets is typically driven by the need to enter either a correcting timesheet to move hours between projects or to enter two timesheets within a particular week (For example, your company is on a monthly accounting calendar but you have weekly timesheet submissions. You can create two timesheets for the timesheet period, one ending on

the last day of the calendar month and the other beginning on the first day of the next calendar month). Disabling timesheet overlapping ensures unique timesheets for each timesheet period.

Remember the last used "New timesheet" form settings: This option enables the quick setup of new timesheets by copying or remembering the last default entries in the Create timesheet form.

Allow empty timesheets: The use of this option is helpful if you require timesheets to be submitted for every timesheet period, without exception. Subcontractors, who may not have time for the period, would have an empty timesheet submitted.

Allow zero-hour entries on timesheets: The difference between this option and the empty timesheet option is this permits the employee to capture notes on a time entry, but does not require the entry of hours to keep the notes in the time entry.

Sort timesheets alphabetically by client and project: As time entries are input into the timesheet and submitted, the Client : Project entries are sorted alphabetically within each day instead of the order they are entered.

Enable the "Save and Submit" button on timesheets: On the timesheet, the Save button appears to save in-progress timesheets. To submit timesheets, you are required to select the Submit/Approve link. This submits the timesheet for approval. Selecting this option provides a Save and Submit button to appear on the timesheet and reduces the submit action to a single click.

Enable start and end time entry on timesheets: If you require employees to identify the specific times of the day when the hours were worked on a Client : Project, then you can enable the start/end time feature. This enables explicit start and end times via the Notes field on each time entry. This option differs from timecards in that timecards define a full day of time to compute total hours instead of individual Client : Project entries for the start/end time.



Important: It is recommended NOT to enable the **Enable start and end time entry on timesheets** when the feature **Use Days Instead of Hours for All Time Entries** is enabled.

If you enable **Enable start and end time entry on timesheets**, when users enter a start time and end time in OpenAir, the duration is calculated in hours and not converted to days.

Enable the leave accrual feature: Leave accrual is a feature focused on tracking leave balances such as vacation and sick time. The feature can track a leave accrual based on the rule setup according to your company policies. For example, a vacation balance may be refilled one time a year or accrued each month at a certain rate per the employee's seniority in the company. A leave balance draw-down is based on time entries against the specific projects or tasks. For example, taking vacation or sick leave adjusts the leave balance.

On time off requests, display current leave accrual balance to managers for approval: When the leave accrual feature is enabled, this option displays the submitter's balance on the approval form. This is useful to ensure the employee's request is in compliance with company policy.

Display the last update date and time below the timesheet worksheet: Activation of this feature displays timestamp information about the last update performed on the timesheet in the tips area of the timesheet.

Do not auto-populate description field on time entries from time off requests: This selection prevents the Description field as entered on the Time off request from populating the Description field on the Timesheet entry. This option is normally selected to allow the employee to enter their own specific descriptions. This is only applicable if time entries are automatically created from approved time off requests.

Do not auto-populate description field on time entries from bookings: This selection prevents the Description field as entered on the Booking from populating the Description field on the Timesheet entry. This option is normally selected to allow the employee to enter their own specific descriptions. This is only applicable if time entries are automatically created from bookings.

Do not auto-populate notes field on time entries from bookings: This selection prevents the Notes field as entered on the Booking from populating the Notes field on the Timesheet entry. This option is normally selected to allow the employee to enter their own specific notes. This is only applicable if time entries are automatically created from bookings.

Display all weeks for timesheets containing multiple weeks: Activation of this feature enables users to work with all the weeks of a multi-week timesheet in the same grid view.

Frequently Asked Questions (FAQs)

How would I know whether I should have Services set up for my company?

If your company provides standard types of services to client, you may want to create services in your account. With services, you are able to use these in invoicing by charging a specific rate or a fixed fee. They can also be used for providing a standard description of the work being performed. See [Service](#).

Why would I use Services on timesheets?

This permits the employee to select the specific services they are performing for a client. These can be used on the invoice. As a caution, enabling services as a selection on the timesheet puts the control of the value in the employee's hands as they would choose the value from a drop-down list. Many companies have the Accounting or Billing Departments control use of the services.

What benefits are there for using the Leave Accrual functionality within OpenAir?

The Leave Accrual functionality provides a way of tracking employees' time-off for vacations and sick days, etc. A employee's balance can be augmented automatically through Leave accrual rules or manually. The balance is also drawn-down through timesheet entries based upon the rule settings by using Time type, Service, Project, or Task, and manually as well. Employees and management are able to monitor the leave accrual balance providing a real-time view into the status of the account. The balance is visible on the timesheet worksheet, leave accrual edit form and on the employee's Dashboard. The balance can also be reviewed on Employee Detail and Advanced reports. You may also review projected leave accrual balances, which are based on the current balance from previous accruals and draw-downs, future accruals and approved time off requests.

What are ways to restrict entry of time types?

Work schedule, filter sets, and disable entry on forms.

When should a time type be used?

When differentiating time for the same project (and possibly task), a time type is required. Examples include: using time types for anything that can impact payroll (overtime, shift work, etc.), impacts financial information (billable vs. non-billable time), or impacts HR leave tracking (e.g., vacation, holiday, leave time). Your company may choose one or more ways to use time types. A best practice is to define a specific use for the time type then determine whether control of its use should be given to the employee entering timesheet data.

Expenses

Overview

The Expenses application captures expense reports and accompanying receipts. It also enables authorizations of anticipated expenses. Depending on a company's needs, employees can enter expenses for a week or any duration. They are prompted to enter a start date, description, and notes. As is the case with all fields on all forms in NetSuite OpenAir, you can mark the description and notes fields as required. Employees also have the option of saving an attachment to an expense report such as a scanned receipt or a receipt within the expense report.

Expenses

Expense reports - Open										
Open Submitted To Approve Approved Rejected Reimbursed All							BULK ACTIONS		Untitled	
Attachment	Tracking #	Name	Date	Status	User	Total (money)	Reimbursable Total (money)	Balance (money)	Exported	
		All	All	All	All				All	
<input type="checkbox"/>	498	30-08-2021 to 05-09-2021	30-08-2021	Open	Gates, Jack	17.55 CAD	17.55 CAD	17.55 CAD	No	
<input type="checkbox"/>	490	30-08-2021 to 05-09-2021	30-08-2021	Open	Huff, Sue	100.00 CAD	100.00 CAD	100.00 CAD	No	
<input type="checkbox"/>	492	30-08-2021 to 05-09-2021	30-08-2021	Open	Castle, Beth	1,595.00 USD	1,595.00 USD	1,595.00 USD	No	
<input type="checkbox"/>	494	30-08-2021 to 05-09-2021	30-08-2021	Open	Kwan, Abby	0.00 USD	0.00 USD	0.00 USD	No	
<input type="checkbox"/>	603	Zibura Tech - Mar 2020	30-07-2021	Open	Porter, Marie	3,829.41 USD	2,109.56 USD	2,109.56 USD	No	
<input type="checkbox"/>	605	Webb Inc - Apr 2020	01-09-2021	Open	Porter, Marie	135.55 USD	135.00 USD	135.00 USD	No	
<input type="checkbox"/>	606	Webb Inc - Mar 2020	01-08-2021	Open	Porter, Marie	674.89 USD	674.89 USD	674.89 USD	No	
<input type="checkbox"/>	607	Zibura Tech - May 2020	11-09-2021	Open	Porter, Marie	860.81 USD	0.00 USD	0.00 USD	No	
<input type="checkbox"/>	615	may	28-08-2021	Open	Glass, Kathryn	225.00 USD	0.00 USD	0.00 USD	No	

The Expenses application permits the entry of incurred business expenses by employees as well as the ability to receive pre-approval of future expenses using Authorizations, if this feature has been enabled. The entry of expenses by employees themselves or on their behalf by the company lets Accounts Payable process and track reimbursements. Employees may enter expense reports against projects for a specific date or period of time, depending on your account configuration.

An additional option available to employees is the ability to use an expense worksheet for multiple receipts and adjust the order of the fields that display on the form. Go to Expenses > Expense reports and select the Worksheet link. To customize this worksheet, go to the bottom of the form and click the customize link. Worksheet layout options allow employees to streamline the entry of multiple receipts within a single form.

Administrators and users with the **Allow user to delete (individually or in bulk) open, submitted or rejected envelopes** role permission can delete either one or multiple expense reports at a time, if this feature has been enabled. When an expense report is deleted, all associated expense items, including any receipts and attachments, are also deleted.

Approval Processes

See [Approval Processes](#) under the Timesheets chapter.

Note: You can access the full list of approval processes defined for your account from any of the Expenses, Invoices, Opportunities, Purchases, Resources, and Timesheets application settings. The same approval process may be used for different transaction types across different OpenAir modules.

Expense Items

Cancel
SAVE
SAVE & CREATE ANOTHER

New
Expense item
Type of expense item
Regular

Price
Currency
USD
Unit measure
☐ Per diem

Price history

Start Date	End Date	Price

[Add rows]

Receipt policy
If the receipt total is greater than 0
☐ Require notes on the receipt
☐ Require receipt approval
Limit per diem expense items
never
☐ Limit applies to any per diem expense item
All per diem expense items will be considered for this policy

Other
☐ Taxable expense item
☐ Require use of expense item price on receipts
Foreign currency receipts are excluded
☒ Active expense item

Expense Items are receipts, tickets, statements or other items that contain costs incurred by an employee and are entered into NetSuite OpenAir expense reports per your company's policies and procedures. The expense items are classifications or categories of these costs. Some examples are: Airfare, Lodging, Mileage, and Business Meals. OpenAir has pre-defined a number of common expense items, but you can modify these and create new items to meet your company's needs.

Expenses entered on expense reports may be rebilled to clients through billing rules and recognized as revenue according to your company's policies. Therefore, expense items also appear under the Invoices application.

To create an Expense Item:

1. Go to Administration > Application Setting > Expenses Settings > Expense Items.
2. Select **New Expense item** from the **Create Button**.
3. Enter the Expense item name and select the Type of expense item, either regular or mileage. A regular receipt is the default receipt form when a new expense report is created. A mileage receipt is a slightly modified form allowing for mileage rates.
Note: The following provides further explanation.
 - Mileage expense items may also be set as a regular receipt type since the form provides the ability to enter a price per unit, or in this case, \$\$ per Mile. If you are not using the Vehicle feature that requires the mileage receipt type, you may opt to set up all expense items to the regular receipt type and avoid end-employee confusion.
 - Each expense item may have a standard price or the field may be left blank for the employee to enter the price on the receipt form itself. Any time a price, rate, or other financial information is stated in OpenAir, you also have the ability to set the currency value if multi-currency is enabled.
 - A Unit Measure indicates the unit for the price and can be any unit you desire.
 - A Per Diem check box is available to classify this type of expense and it must follow a particular per diem policy.
4. The next section in the form relates to Receipt policy, which controls actions based on the individual receipt and expense item entered into an expense report. You are able to enter parameters for the receipt and select whether to require notes or approval based on the settings. For per diem expense items, you are able to choose how to limit their use within the system.
5. Under the Other section, you may enter text to be used on proposals in the Opportunities application.
6. Check the Taxable expense item check box if tax may be charged to the client for this expense item. A tax location may optionally be entered by the employee per receipt if this setting is activated. See [Tax Locations](#) and [Tax Options](#).
7. If you would like the expense item price to be required on the receipt, select the check box. If your cost center rules for receipts include expense item cost center values, then you need to optionally set the cost center on expense items as well. The cost center field only displays if you have configured the cost center Receipt rules to involve expense items. See [Cost Centers](#).
8. There is an option to control viewing of expense items using Filter Sets. Expense items are one of the data access control objects within a filter set definition. See [Filter Sets Overview](#).

Expense Report Layout

Cancel SAVE

Edit

Date format
none (use default date format) ▼

Starting tracking number
100
The current highest tracking number is 548.

Grid style
Thin grid lines ▼

☐ Show a daily summary by expense item

☒ Show the exp report approval history

☒ Show link to exp report attachments

☐ Show all days in the daily summary

☒ Show link to exp report receipt attachments

Maximum date columns per row in the daily summary
80
If printing, specify a value to force wrapping of the daily summary

Receipt order
☒ By date
☐ By reference number

Employee fields > Create ☐ Show labels


Additional text or HTML to print at the end of the expense report


You can tailor the Expense report layout to meet your company's needs. Since this report form may be routed for review and approval internally, the layout should clearly communicate the expenses that have been incurred. You are able to select the Date format, Starting tracking number, and Grid style. These settings determine the numbering of created Expense reports and the basic style of the expense report.

To access and modify the Expense report layout:

1. Go to Administration > Application Setting > Expenses Settings > Expense report layout.
2. If you select the check box to **Show the exp report approval history**, the approval history is displayed to a reviewer at the bottom of the page.
3. If you select the check box to **Show the authorization history**, the authorization history is displayed to a reviewer at the bottom of the page.
4. If you select the check box to **Show a daily summary by expense item**, an additional section on the expense report displays summarizing the expense items per day.
5. If you select the check box to **Show link to expense report attachments**, a link to expense report attachments displays. Reviewers can view or download information.
6. If you select the check box to **Show link to expense report receipt attachments**, a link to expense report receipt attachments displays. Reviewers can view or download information.
7. If you select the check box to **Show the billable/non-billable totals in the daily summary**, a split of billable and non-billable expenses are displayed within the daily summary area. This feature makes use of the Billable receipt radio buttons on individual receipts. To enable this feature, [Creating a Support Case](#) and request that OpenAir Support enable: Use a radio button to force selection of billable or non-billable on receipts.
8. Enter the Maximum date columns per row in the daily summary. The default is 80. This forces wrapping of the daily summary columns.

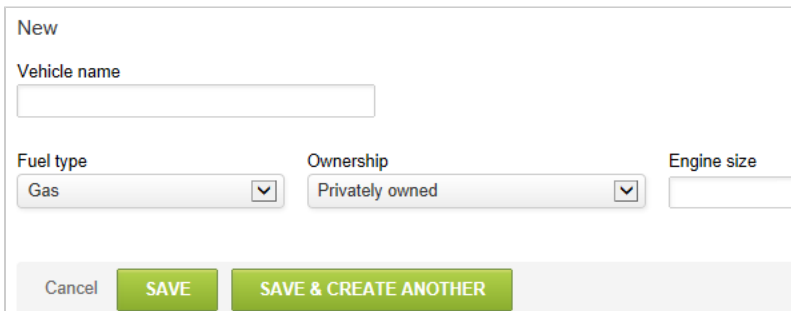
9. The last option is to display an overlapping status on the expense report header. This option is only available if your setup has specified expense report durations such as weekly or monthly and you have not disabled overlapping expense reports.
10. Select Receipt order: By date or By reference number.
11. Enter additional employee display information as desired. Select Employee fields > Create. Additional information may include employee cost center or address.
12. Enter notes to display at the end of the expense report, if desired.
13. Select the fields that you would like to display on the Expense report using the drop-down list for each column. The order you set the fields determines the order in which the fields are displayed as columns on the expense report.

 **Tip:** If your employees are entering Foreign Currency Receipts, it is helpful to include the original Foreign Currency fields for approvers to use when they are reviewing receipt submission.

 **Note:** Configuring text wrap for column headers is not currently supported. However, where column headers contain space-separated multiple words, text wrapping should apply to column headers in the print or PDF version of the expense report.

14. Select the Adobe Acrobat PDF settings you would like to use in your environment. We recommend that you print out of a sample Expense Report when the PDF settings are in place to ensure the page layout and margins are set correctly.

Vehicles



Vehicles is an optional feature in OpenAir that is not typically used. It displays in Application Settings for Expenses and Invoices. To allow this functionality, you need to select the Enable the Vehicle feature in the Optional Features form.

To enable the Vehicle feature:

- Go to Administration > Global Settings > Optional Features and select the switch to **Enable the Vehicle feature**.

When one or more vehicles have been set up in the system, the Vehicle drop-down list is available on mileage receipts in the Expenses application and on mileage expense charges you create in the Invoices application.

Note: If you have created mileage expense items as regular receipts, the vehicle drop down list is not available. Vehicle designation is only available on mileage receipts. So if your company has a preference to indicate company car usage, for example, the mileage expense item must be created under a mileage receipt type.

To enter a Vehicle:

1. Go to Administration > Application Setting > Expenses Settings > Vehicles.
2. Select **New Vehicle** from the **Create Button**.
3. Enter the Vehicle name. This could be a name such as Bill White's Ford Taurus, a company vehicle number, or a license plate/tag number.
4. Select the Fuel type and Ownership from the drop-down lists.
5. Type the Engine size, if known.
6. Click Save.

Vendors

Cancel
SAVE
SAVE & CREATE ANOTHER

New

Vendor name ☒ Active vendor

Demographic Information

Web address
e.g. <http://www.openair.com>

Email

Phone Fax

Purchasing Address

Attention: Address

City State/Province ZIP/Postal code Country

Purchasing Information

Payment terms Currency Federal tax rate % State tax rate %

PO note (displayed on every PO)

Email PO text (displayed on every email announcing POs)

Notes

Vendors are an optional feature in the Expenses application. They are primarily used for vendor management and reporting. When a receipt is entered into an expense report, a vendor can be selected. Vendors are also used in the Purchases application.

To display the Vendor form:

Go to Administration > Applications Settings > Expenses Settings > Other settings and select or clear the switch to **Hide the Vendor field on receipts**.

Setting the vendor on receipts is useful for tracking spending at particular vendors to obtain discounts on services or products. Vendors play a much more important role for companies using the Purchases application in OpenAir.

To create a Vendor:

1. Go to Administration > Application Setting > Expenses Settings > Vendors.
2. Select **New Vendor** from the **Create Button**.
3. Enter the Vendor name and the demographic information, if known. The remaining fields on the Vendor form are optional if vendors are only being used within the Expenses application. The address information is used primarily in the Purchases application.

Payment Types

The screenshot shows a web form for creating a new payment type. At the top are three buttons: 'Cancel' (grey), 'SAVE' (green), and 'SAVE & CREATE ANOTHER' (green). Below the buttons is the heading 'New'. The form contains the following fields:

- 'Payment type': A single-line text input field.
- 'Active payment type': A checkbox that is currently checked.
- 'Default payment type': A checkbox that is currently unchecked.
- 'Notes': A multi-line text area with up and down arrow controls on the right side.
- 'Default receipt status': A dropdown menu with 'None' selected.

Payment Types are an optional feature in OpenAir and display in Application Settings in Expenses and Invoices. This functionality lets you select a payment type such as Cash, Credit Card, or Check on a receipt in the Expenses application or on an expense charge in the Invoices application.

Payment types are primarily used by your Accounts Payable or Accounting group to indicate how items were paid for by employees as this may determine the categorization of expenses in the accounting system. An example is a company credit card, which indicates the Accounting organization may need to issue a payment to the credit card company instead of the employee, depending on your company's policy regarding use of the credit card. OpenAir has pre-defined a number of common payment types, but you can modify these and create new items per your company's needs.

To enable Payment types:

1. Go to Administration > Applications Settings > Expenses Settings > Other settings and select the switch to **Require a payment type selection on receipts**.

To create a Payment type:

1. Go to Administration > Application Setting > Expenses Settings > Payment types.
2. Select **New Payment type** from the **Create Button**.
3. Enter the Payment type name.
4. Select the check box for **Active payment type**.
5. If desired, select the check box for **Default payment type**, which automatically displays this payment type on new receipts. This is not required.
6. Add any Notes regarding this payment type, if desired.
7. Select the Default receipt status from the drop-down list if desired. Values are: None, Reimbursable, and Non-reimbursable. The Company credit card example noted above may be set up as a default receipt status of Non-reimbursable if your company pays the company credit cards centrally through your Accounting department.

To create a Payment type custom field:

1. Go to Administration > Global Settings > Custom fields.
2. Select **New Custom field** from the **Create Button**.
3. Select Payment Type using the Add a custom field to drop-down list.
4. Under the Type of field to add drop-down, select the type of custom field desired, and click Continue.
5. Enter the Field name and Display name, complete any other necessary fields.
6. Click Save.

Authorizations

Cancel
SAVE

General

Authorization name/destination

Currency

USD

Description/purpose

Client : Project

Select...

Depart (MM/DD/YY)

10/21/13

Return (MM/DD/YY)

10/21/13

Advance required

Notes/instructions


Attachments

Current Attachment(s)

(none)

New Attachment
Browse...

Authorizations request advance approval of future expenses. Employees create an authorization, enter future expenses, and request approval. To use this feature, you must enable expense authorizations.

 **Note:** Authorizations do not *prevent* any expense entry.

To enable Expense authorizations:

Go to Administration > Application Settings > Expenses Settings > Other settings and select the switch to **Enable expense authorizations**.

Authorization Numbering

When the authorization feature is enabled, a tab displays in the Expenses application for Authorization numbering. In addition, a link for the Authorization numbering form displays under Expenses Settings. Use it to designate an authorization starting number.

To request an Authorization:

1. Go to Expenses and select **Authorizations New** from the **Create Button**.
2. Type Authorization name/destination.
3. Select currency and type description.
4. Select Client : Project.
5. Enter dates.
6. Type advance required.
7. Provide any additional information and click Create authorization.

Notifications

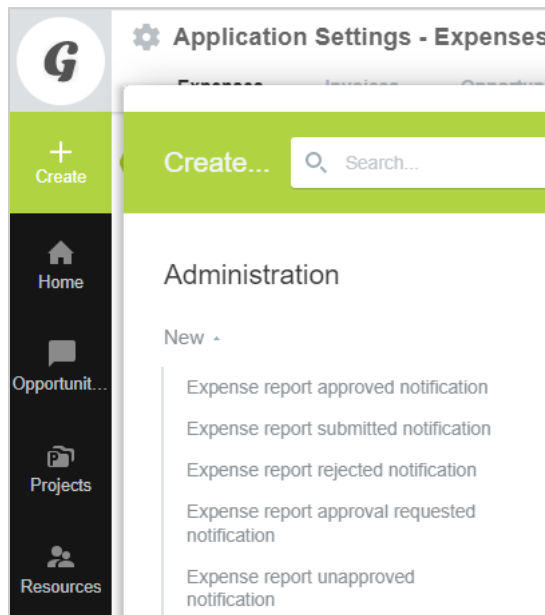
The screenshot shows the 'Notifications' configuration window in NetSuite OpenAir. At the top are 'Cancel' and 'SAVE' buttons. The 'Send a notification ...' section includes a dropdown for 'When these conditions are met ...', a note 'One or more conditions are required', and a condition 'Was approved by proxy' with a 'Yes' dropdown. An 'Add row' link is below. The 'Notify' section has two columns: 'Available' (listing roles like [Approver's department head], [Approver's manager's manager], [Approver's manager], [Approver], [Co-Approver], [Submitter's department head], [Submitter's manager's manager], [Submitter's manager]) and 'Selected' (empty). Between them are 'Add selected >', 'Add all >', '< Remove selected', and '< Remove all' links. Below is a text field for 'External email addresses' with a note 'Separate multiple addresses with a comma' and a dropdown for 'For email with multiple recipients:' set to 'Send each email separately'. The 'Email message' section has a 'Subject' field with 'Exp report approved' and an 'Email body' field with a template: 'The exp report "%name%", approved by %approved_by%, is approved'. At the bottom is a 'Field' dropdown set to 'Select...' and a 'Paste' button, with a note 'Select the field and click "Paste" to use it in the body'.

Expenses email notifications are highly configurable in NetSuite OpenAir. You can send an email notification when an expense report is approved as well as for expense reports and authorizations that are submitted or approved by proxy. You can also send notification when specified conditions are met. You designated who receives notification and compose the actual email notification message.

To enable this feature, [Creating a Support Case](#) and request the following switch be enabled: Enable administration of notifications in the following application settings: Expense reports.

To create expense report or authorization email notifications:

1. Go to Administration > Application Settings > Expenses Settings > Notifications.
2. Select the notification type from the **Create Button**.



3. In the Send a notification... section, select either the type of new notification you are creating or when these conditions are met.
4. Proxy: Yes or No - Determines if this notification can be used for regular or proxy submissions. For more information on Proxy, see [Proxy](#).
5. Click + to add a row and if you select the Client : Project option, you can use the Search function to select the actual Client : Project name from the pick list. You can also select Expense item and Payment type and select from the options available in your account. Indicate whether the condition includes or excludes what is selected.
6. Under Notify, specify either individual email addresses or select employees from the Available employee selection box. External email addresses can also be included.
7. Under Message, enter the desired contents of the email to be delivered upon expense report or authorization submission. Use the Field drop-down list to specify pre-set variables as part of the email. To do this, choose the variable from the drop-down list and click on the word **Paste** to insert the variable into the email body.
8. Click Save.

Alerts

Cancel **SAVE**

Overdue approval alert

Alert name

Alert runs on

Times are in U.S. Eastern Time

Day: Monday at Hour: 12am Minute: 00

Rule

Send the approver an email if they have not approved an exp report that was submitted

1 or more days ago

Only send alerts to:

☐ Employees/Departments in filter [> Create](#)

Email notification

Other

The Overdue approval alert functionality lets you send an automatic email reminder to ensure that expense reports are approved in a timely manner.

To create an Overdue approval alert:

1. Navigate to Administration > Application Settings > Expenses Settings > Alerts.
2. Select **New Overdue approval alert** from the **Create Button**. The Overdue approval alert form displays.
3. Name the alert.
4. Under Alert runs on, select the day and time when the Alert should run.
5. Under Rule, define the appropriate selection rules for why the employees would receive an email alert.
6. Select the check box to specify Employees/Departments in filter and click Create to identify departments and system employees to specify who receives an email alert.
7. Use the Email notification section to define the email sender, subject and text, and decide whether to copy other employees on the alert email.
8. Add notes, as desired. These notes do not appear anywhere in the alert; they are for informational purposes, such as to remember why the alert was created.
9. Select Active alert to make this alert active.
10. Click Save.

Other Settings

The Expenses application has many configurable parts including add-on functionality and interaction with how you are performing your resource and project management.

To access the Expenses Other settings:

1. Go to Administration > Application Setting > Expenses Settings > Other settings.

Allow an approver to edit a submitted expense report: When expense report approvals are used, expense reports are submitted for review by a defined employee who then approves or rejects the expense report. To avoid time delays introduced by having the reviewer reject an expense report then the owner fixing and resubmitting the expense report activating this option gives the reviewer the ability to edit the expense report receipts directly before continuing with an approval.

Require a client selection on receipts: If you have displayed Clients : Projects (and possibly Clients only depending on the show client name option) for entry on the receipt form or expense worksheet, this option lets you make this field mandatory for all employees.

Require an expense item selection on receipts: This option requires employees to always select an expense item instead of submitting expenses against a project without an expense item. Expense items must be configured and at least one expense item must be active. If no expense items exist or all are inactive, then this option has no impact. See [Expense Items](#).

Require a payment type selection on receipts: This option requires employees to always select a payment type before saving a receipt. Payment types must be configured and at least one payment type must be active. If no payment types exist or all are inactive, then this option has no impact. See [Payment Types](#).

The 'Company paid' payment type is always non-reimbursable: The Company paid payment type has special treatment with this option. Payment type and Reimbursable drop-down lists may be displayed on a receipt with each value set independently. Activating this option ensures the selection of the Company Paid payment type sets the Reimbursable value to Non-reimbursable.



Important: To use this feature, you must create a payment type exactly named "Company paid".

Hide the payment type drop-down on receipts: The payment type field is available on each receipt. Setting this option hides the field from data entry.

Enable expense authorizations: The expense authorization feature lets employees request approval for an anticipated expense. When activated, another tab displays in the Expenses application named Authorization. Employees may create and submit expense authorizations citing the anticipated expense and expected amount. The authorization can then be submitted and reviewed through a defined expense authorization approval process. When approved, an expense authorization may then be included on an expense report to show pre-authorization of the expense.

Allow an approver to edit a submitted expense authorization: When expense authorization approvals are used, expense authorizations are submitted for review by a defined employee who then approves or rejects the expense authorization. To avoid time delays introduced by having the reviewer reject an expense authorization then the owner fixing and resubmitting, activating this option gives the reviewer the ability to edit the expense authorization entries directly before continuing with an approval.

Hide the "Advanced required" field on expense authorizations: The Advanced required field is available on each authorization to allow employees to note that a cash advance is required to complete the expense purchase. Setting this option hides the field from data entry.

Hide the "Reimbursable/Non-reimbursable" drop-down on receipts: The Reimbursable/Non-reimbursable field is available on each receipt. Setting this option hides the field from data entry. If you display the payment type on expense receipts, you may want to include this field as well or allow the payment type to handle the designation of reimbursable/non-reimbursable.

Hide the "Expense item location" field on receipts: The Expense item location text field is available on each receipt to allow employees to note the location of the expense such as the destination of an airline ticket to complete the receipt entry. Setting this option hides the field from data entry.

Hide the "Vendor" field on receipts: The Vendor field is available on each receipt to allow employees to note what vendor will be supplying the specific expense item. Setting this option hides the field from data entry. Vendors must exist in the system and have at least one active if Vendor is displayed on receipt. See [Vendors](#).

Hide the "Cash advance" field on expense reports: The Cash advance field is available on each receipt to allow employees to note the amount of a cash advance provided by the company for the specific expense item. Setting this option hides the field from data entry. If authorizations are used and the 'Advanced required' field is displayed on the authorization, including this field on the receipt permits a process check within accounting.

Allow receipts to be associated with tasks: In addition to submitting an expense against a Client : Project, you may allow employees to enter receipts against a specific task. This is useful if you are tracking deliverables and the cost involved in completing the deliverable such as postage and reproduction costs. If you select this option, a task drop-down list displays on each receipt.

Require a task selection on receipts: If you have selected the option to allow tasks to be associated with a receipt, then this option lets you make the task drop-down selection required instead of optional.

Make the exp report tracking number read-only: OpenAir starts the expense report numbering at 1 and increments it by 1 for each new expense report. The expense report number may be edited unless this option is selected, thereby making the field read-only.

Allow non-billable receipts: The receipt form displays a billable check box if this option is selected. This lets employees note that the receipt billable or not.

Do not default receipts to the current date: The date field on receipts defaults to the current date unless this option is selected. When this option is selected, the date field is left blank and is a required field for entry before a receipt form can be completed.

Show only clients and projects with open tasks assigned to the employee: Tasks have an open/closed flag to provide project managers control over completed or in-progress service on a project. Depending on how you are assigned or allocated to projects and tasks for expense entry, the activation of this option shows you only a Client : Project with open tasks available to you for expense entry.

Show only clients and projects with open tasks booked to the employee: Tasks have an open/closed flag to provide Project Managers control over completed or in progress service on a project. Depending on how you are booked to projects and tasks for expense entry, the activation of this option shows only Client : Project with open tasks that you are booked for available for expense entry. If this option is not enabled, then any Client : Project with tasks booked to you for expense entry is displayed including those with all closed tasks. This, in turn, permits the entry of expenses against closed project tasks.

Do not auto-populate description field on receipts: The description field on receipts is an additional text field to the notes field. By default, it displays the name of the selected expense item or is blank if you do not require an expense item on the receipt. Selecting this option keeps the description field blank regardless of the expense item selected.

Enable line item rejections of receipts: If you have enabled expense report approvals, the expense report is submitted and reviewed/approved using the expense report approval process. By default, all receipts are included in an expense report rejection. Activation of this option enables each receipt to be individually rejected if necessary to expedite the expense approval. Rejected receipts are removed from the approved expense report and placed into a newly created expense report entitled Rejected receipts from xxxx where xxxx is the expense report name of the original expense report. The newly created expense report must be submitted by the expense report owner for re-review after correcting the issue which caused the rejection.

Enable the missing paper receipt feature: When you enable this feature, a Missing paper receipt check box displays on the receipt form or worksheet. This feature is useful to Accounts Payable if you submit

receipts with the expense report and a reconciliation effort is done against the receipts entered on the expense report.

Always display the "Save and create another" button on receipts: A Save button is displayed at the bottom of the receipt form. Selection of this option also displays a 'Save and create another' button next to the save button, which enables quick creation of receipts.

Minimum amount required to submit an expense report: Expense reports by default can be submitted for any amount. If your policies require a minimum, enter the amount in this field. The default currency setting of the system is used to define the currency type of this amount field, i.e., USD.

Foreign currency receipt type: This field setting lets you designate how exchange rates are used on Foreign Currency receipts.

Foreign current receipt markup (%): Entry of a value in this field applies a markup to Foreign Currency receipts. The percentage value to enter is an integer value, i.e., enter 5 for 5 percent. Markups are useful if you are using a non-modifiable Foreign Currency receipt type setting, but your account wishes to reimburse or bill a higher amount to cover conversion costs.

Default to expense worksheet when viewing an expense report: The expense worksheet is an alternate way to enter receipts into an expense report. When you select this option, OpenAir automatically displays the expense worksheet after employees create an expense report instead of displaying the receipts form.

Default expense worksheet quantity to 1 for new receipts: The quantity field is left blank for entry on the expense worksheet. When this option is selected, the quantity field is populated with a default value of 1, which lets employees tab over the field if this quantity is valid for the receipt row being entered. This saves time on data entry.

Add receipt custom fields to expense worksheet: If you have created custom fields for receipts, you may also have these fields display on the expense worksheet for data entry. The custom fields are not automatically included in the expense worksheet unless this checkbox is selected.

Enable the "Save and Submit" button on expense worksheet: A Save and Submit button appears on the bottom of the expense worksheet.

Lock expense worksheet columns during horizontal scroll: Locks the columns on the expense worksheet to allow horizontal scrolling to keep left-most data visible. The numbers in the drop-down list relate to column numbers, i.e., Number 2 relates to column 2 on the expense worksheet.

Expenses are paid by: A specific employee may be designated in this field. That employee will receive an email when any expense report in the system is fully approved.

Expense Attachment Deletion Wizard

You can use the Expense report attachment deletion wizard to delete expense attachments from OpenAir and free some of your OpenAir account storage space. The wizard lets you delete files attached to expense reports and to receipts within these expense reports. To access the wizard go to Home > Home and click **Expense report attachment deletion wizard** in the Wizards portlet.

You need to specify:

- A date range — Attachments will be deleted only if the expense report date is within the specified date range.
- An expense report status — You can choose to delete expense attachments for reimbursed expense reports only or approved expense reports only.



Important: After you delete an attachment from OpenAir, it cannot be recovered. Only delete attachments if you have downloaded them using OpenAir Automatic Backing Service, and if you are confident that you no longer need to match an expense with that attachment.

Delete expense report attachments

The expense report date is between

Start (YY-Month-DD) * End (YY-Month-DD) *

Start and end dates are required

The expense report status is

☒ Reimbursed

☐ Approved

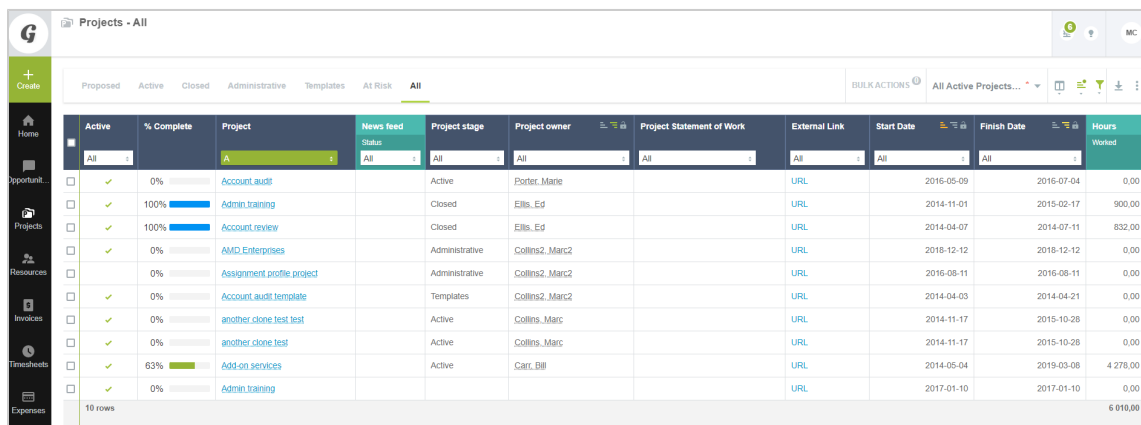
Cancel Delete the attachments

Projects

Overview

The Projects module holds the project plan, the work breakdown structure, personnel assignments, financial information including billing and recognition rules, and reports. Clients enter and maintain specific project plan information and outline the work breakdown structure in detail. They can categorize projects into different project stages such as Statement of Work, Internal, Templates, Proposed, Active, In Progress, and Closed or Complete. Remember, all terminology can be customized to meet the unique needs of your company.

Projects — Introduction



Active	% Complete	Project	News feed status	Project stage	Project owner	Project Statement of Work	External Link	Start Date	Finish Date	Hours Worked
<input type="checkbox"/>	0%	Account audit	All	Active	Porter, Marie		URL	2016-05-09	2016-07-04	0.00
<input type="checkbox"/>	100%	Admin training		Closed	Ellis, Ed		URL	2014-11-01	2015-02-17	900.00
<input type="checkbox"/>	100%	Account review		Closed	Ellis, Ed		URL	2014-04-07	2014-07-11	832.00
<input type="checkbox"/>	0%	AMC Enterprises		Administrative	Collins2, Marc2		URL	2016-12-12	2016-12-12	0.00
<input type="checkbox"/>	0%	Assignment profile project		Administrative	Collins2, Marc2		URL	2016-08-11	2016-08-11	0.00
<input type="checkbox"/>	0%	Account audit template		Templates	Collins2, Marc2		URL	2014-04-03	2014-04-21	0.00
<input type="checkbox"/>	0%	another clone test		Active	Collins, Marc		URL	2014-11-17	2015-10-28	0.00
<input type="checkbox"/>	0%	another clone test		Active	Collins, Marc		URL	2014-11-17	2015-10-28	0.00
<input type="checkbox"/>	63%	Add-on services		Active	Carr, Bill		URL	2014-05-04	2019-03-08	4 278.00
<input type="checkbox"/>	0%	Admin training					URL	2017-01-10	2017-01-10	0.00
10 rows										6 010.00

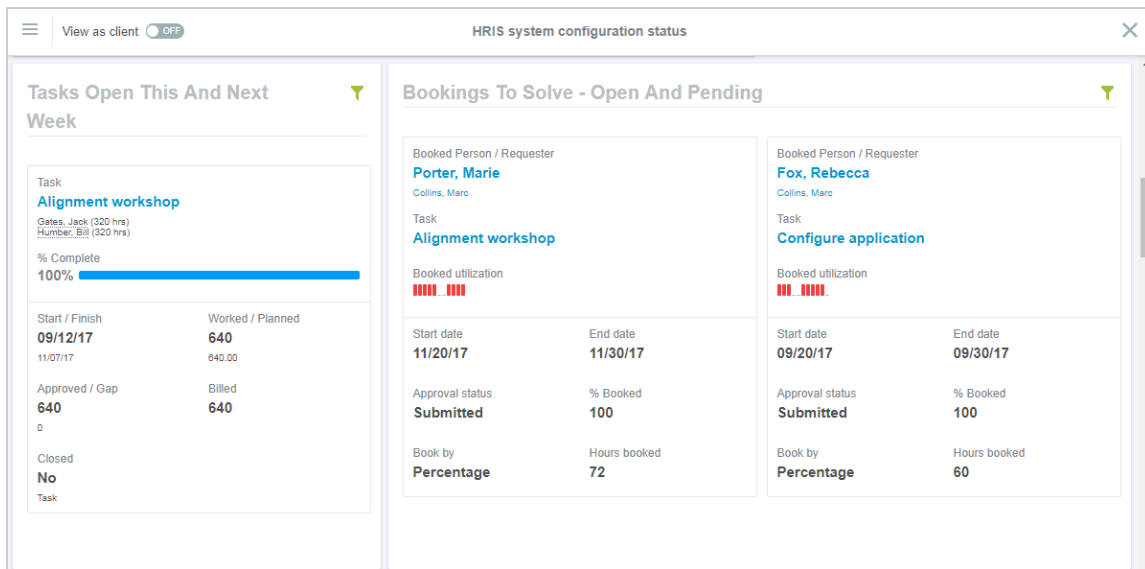
The Projects application is one of the primary components within OpenAir. This is the application where you manage your company's projects. There are a number of system settings and data elements associated with the Projects application. The features and flexibility within this application are probably greater than any other application available within the system.

Within the Projects application there are additional options to configure application-specific items such as the task worksheet within projects and the automated running of billing or recognition rules.

You are also able to evaluate the status of projects using Earned Value Management (EVM) metrics. It is easy to determine if it is profitable or unprofitable, and whether it is on schedule, behind schedule, or ahead of schedule. To use these metrics, you must have designated a cost for each resource, have a project plan established, and have the resources' time entered into OpenAir by project as time is incurred.

Project Status Summary (PSS)

Use Project Status Summaries to produce easy-to-read project status pages which summarize important project progress data. The project status summary is customizable, and can be populated with information critical to your company internally or your clients externally.





Enabling Project Status Summaries

To enable Project Status Summaries, please contact OpenAir Support and ask them to enable the Project Status Summaries feature. Once this feature has been enabled for your account, you will need to assign View or Edit permissions to your roles. The available role settings are:

- View Project status page
- View and modify Project status page

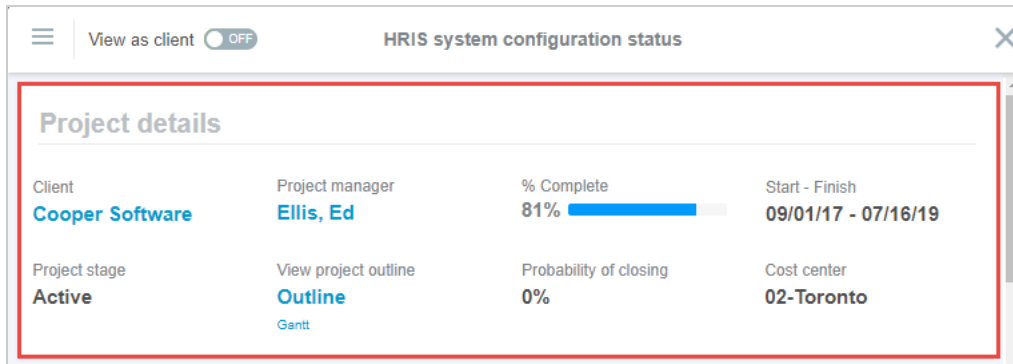
Opening Project Status Summaries

There are three ways to navigate to the PSS:

- Point to any element which opens a project QuickView and click **Status summary**.
- In any project QuickView, click the  icon in the upper right corner.
- Go to Projects > Projects and select a project. In the Project Dashboard, click the  icon next to the project name.

Using Project Status Summaries

Each Project Status report can contain a header with basic information about the project. The default project header can be modified or deleted.



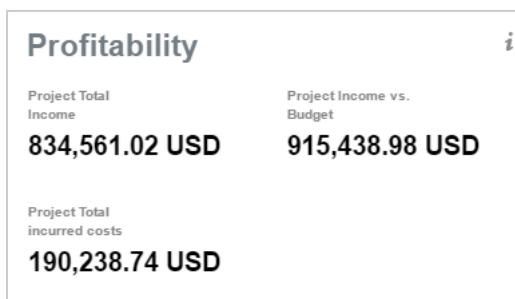
View as client ☐ OFF

HRIS system configuration status

Project details

Client Cooper Software	Project manager Ellis, Ed	% Complete 81% <div><div></div></div>	Start - Finish 09/01/17 - 07/16/19
Project stage Active	View project outline Outline Gantt	Probability of closing 0%	Cost center 02-Toronto

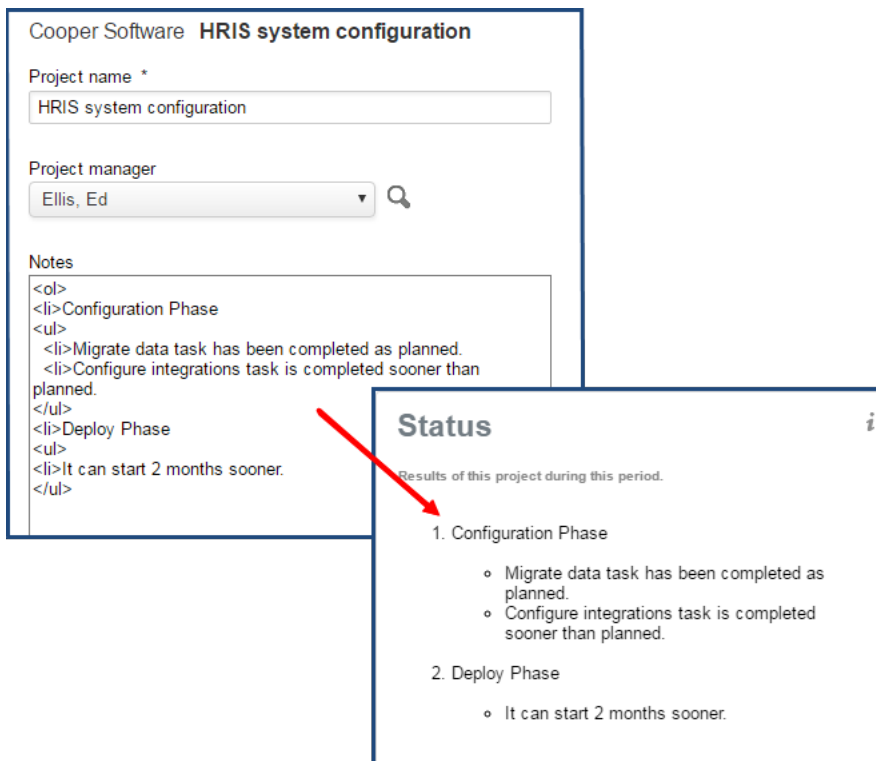
Below the header, you can add a series of customizable portlets which show information on tasks, task assignments, bookings, and other project- and task-related information.



Profitability

Project Total Income	Project Income vs. Budget
834,561.02 USD	915,438.98 USD
Project Total incurred costs	
190,238.74 USD	

The PSS can display project status messages which are entered in a text box in HTML within the project properties form.



Cooper Software **HRIS system configuration**

Project name *
HRIS system configuration

Project manager
Ellis, Ed

Notes

```
<ol>
<li>Configuration Phase
<ul>
<li>Migrate data task has been completed as planned.
<li>Configure integrations task is completed sooner than planned.
</ul>
</li>
<li>Deploy Phase
<ul>
<li>It can start 2 months sooner.
</ul>
</li>
</ol>
```

Status


Results of this project during this period.




- Configuration Phase
 - Migrate data task has been completed as planned.
 - Configure integrations task is completed sooner than planned.
- Deploy Phase
 - It can start 2 months sooner.

Editing Project Status Summary Layouts

To edit the Project Status Summary layout:

1. Click the **Options**  icon and click **Edit**.

- To add a new portlet, click the **Add new portlet**  icon and select the type of portlet to add. Enter a Label and Description for the portlet. You can also select if the portlet is visible in Client View.

If the portlet is a dynamic portlet, you can select up to three fields to sort individual portlet cards by. Drag the fields to change their order, or click the **Remove**  icon to remove the field from the portlet. Click the **Ascending order**  or **Descending order**  icon to set the sorting order.




Tip: We highly recommend ordering the content of dynamic portlets; without a set order, portlet cards are ordered randomly.

Click **Apply** to add the portlet to the Project Status Summary.








Note: Some portlets require that you have the correct account settings or roles before they can be added to a Project Status Summary. If you are unable to add a desired portlet to your Project Status Summary, confirm with OpenAir Support that you have all of the required features or roles to add the portlet. For example, to add the “Bookings” and “Task Assignments” portlets, the “Enable approvals for Bookings” and “Enable Task Assignment Lists” features must be set for your account by OpenAir Support.

- To add a field to a portlet, click the **Add item**  icon within the portlet and select the field to add. Enter a title for the field, or leave it blank to use the default title. Select an optional footnote for the field (footnotes can contain information from a data source or custom text which you enter yourself). You can also select if the field is visible in Client View, and limit the field to particular roles. Click **Apply** to add the field to the portlet.
- To put an item in a portlet card header in a dynamic portlet card, drag the item from the card body to the card header.



Note: You can place multiple fields in a portlet card header.

- To move a portlet, drag it to a new location in the Project Status Summary.
- To edit an existing portlet, click the **Edit portlet**  icon at the top of the portlet.
- To make a portlet visible or to hide a portlet in Client View, click the **Hidden**  or **Visible**  icon at the top of the portlet. Alternatively, click the Edit portlet icon and select or clear the **Visible in Client View** option.
- To delete a portlet, click the **Delete this portlet**  icon.
- To add filters to a portlet, click the **Define how cards are filtered**  icon. Click the **Add Condition** button to create conditions to filter by. Click **Apply** to apply the filter.



Tip: We highly recommend using filters in dynamic portlets to get the most targeted data.

Filters support relative and rolling date filters.

The available operands are:

Today	Yesterday	Tomorrow	Last week	This week
Next week	Last bi-week	This bi-week	Next bi-week	Last month
This month	Next month	Last semi-month	This semi-month	Next semi-month
Last quarter	This quarter	Next quarter	Last year	This year
Next year				

A green filter icon indicates if filters are active in a portlet in View mode. You can also point to the filter icon to see if filters are active.



Filter: Tasks Open This And Next Week

If ALL of these conditions are TRUE ADD CONDITION

III	Closed	is false	
III	Task classification	is equal to	T
III	Finish date filterable	is greater than or equal to	This week
III	Start date filterable	is less than or equal to	Next week


Today
Yesterday
Tomorrow
Last week
This week
Next week

Approved	Gap	Billed
416	1,072	5,336

2. Click **Save** to save your Project Status Summary layout.
3. Click the **Options**  icon and click **Exit editing mode** or click the **Close**  icon to close the Project Status Summary.

Printing Project Status Summaries

To print a Project Status Summary:

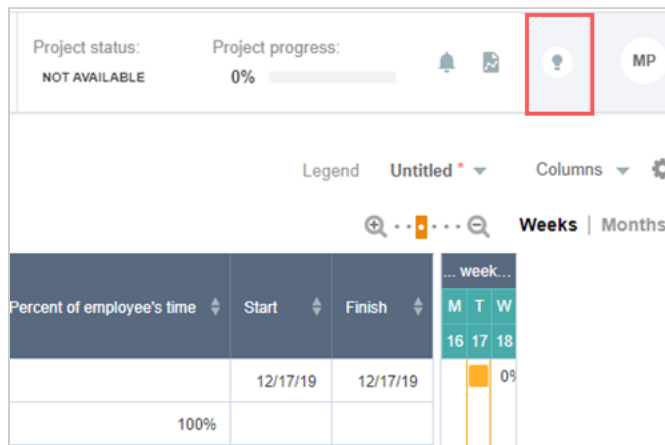
1. Click the **Options**  icon and click **Print**.
2. Set your printer settings and click **Print**.

Project Status News Feed

Use this feature to add, update, and display project status messages to keep project stakeholders informed.

When this feature is enabled:

- Project record headers and project QuickViews show a **"News Feed" icon**. Click this icon to open the Project Status News Feed, where you can add status updates to your project or read existing updates.



- If the **Redesigned OpenAir user experience Phase 2 and/or 3** feature is enabled for your account, you can add the **News feed — Status** column to your list views.
 - The **News feed — Status** column shows the project status tag as a color coded text badge, if there are any status update for the project and if a project status tag is set in the latest status update.
 - Click on the tag to open the project status news feed from the projects list view and view the latest status update details. You can sort and filter your data by Status using the list view sort and filtering options.

Project	News feed	Project stage
All	Status	All
Project Center implementation	NOT STARTED	Active
Data Migration	NEEDS ATTENTION	Active
ERP Deployment	COMPLETED	Active
Pegasus	ON HOLD	Active
Hardware implementation	ON TRACK	Active
OAuth2 Support for all Integrations		Active
Hardware Implementation	PROPOSED	Active

Note: The **News feed — Status** column is currently only available on redesigned list views if the **Project status news feed** feature is enabled for your account.

The project status tag is not currently supported in:

- Project status summary
- Reports
- Dashboard portlets
- List views other than redesigned list views.


After the feature is enabled for your account, you can control who can view or modify the Project Status News Feed using the following role permissions:

- **View Project News Feed on any project** – Users with this role can see the Project News Feed, but cannot edit it.
- **View and modify Project News Feed on any project** – Users with this role can see the Project News feed and add, edit, or delete messages in it.

Note: Project owners can add, view, modify or delete news feed messages for the projects they own even if they do not have this permission.

Note: To enable this feature, contact OpenAir Customer Support and request the "Project Status News Feed" feature.

To add a project status update to a project:

1. Go to Projects > Projects> [Select a project].
2. Click the "News Feed" icon. The "Project Status New Feed" appears.
3. Click the  icon in the top right corner of the Project Status News Feed. The "New Status Update" dialog appears.
4. Click the "Title" field and enter a title for the Status Update. Titles are limited to 125 text characters. Status Updates do not require a title.
5. In the main text box below the title, enter the project status message. The main text box uses a rich text editor with the following features:
 - Creating bold, italicized, or underlined text
 - Creating bullet lists or numbered lists
 - Adding hyperlinks
 - Adding emoticons
 - Distinguishing between headers and main body text
 - Changing font color

Status update body text cannot exceed 3,000 characters.

New Status Update

TITLE
Audit issues identified

23/125

B I U [List Icon] [Link Icon] [Image Icon] **Format** **A**

It looks like the following **audit issues** will need to be added to the report going to the Board of Directors:

- Several key processes are inadequately documented.
- Client self-identified one medium risk control gap in their accounting process.

NEEDS ATTENTION **DISCARD** **SAVE & PUBLISH**

6. In the Status Tag dropdown list, select a pre-defined status tag for the message.
7. When you have finished editing the text for your Status Update, click **SAVE & PUBLISH**. You can also click **DISCARD** to return to the Project Status News Feed without saving the message.

Each Status Update is tagged with a time and date stamp and the name of the person who wrote it.

03/15/17 10:11 AM by Collins, Marc

EDITED

Proceeding on schedule. Initial findings identified:

- 3 security issues have been noted; medium risk
- Client identified potential areas of political risk which must be managed carefully
- Client's department is understaffed - currently searching for 2 new employees to fill vacancies.

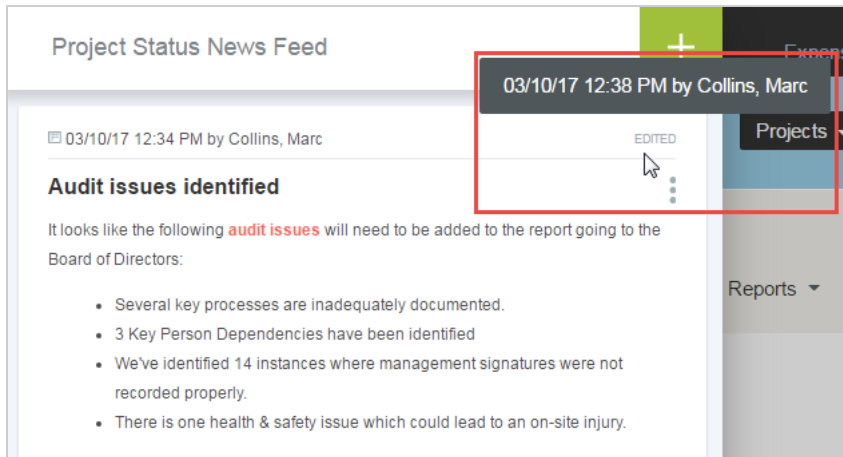
STATUS: **ON TRACK**

Status updates can be edited after they've been published.


To edit a Status Update:

1. Point to the upper right corner of the Status Update you want to edit and click on the Options icon which appears.
2. Click "Edit". The "New Status Update" editor opens with the title and text of the status update you want to edit.
3. Make the necessary changes to the status update, and click **SAVE & PUBLISH**.

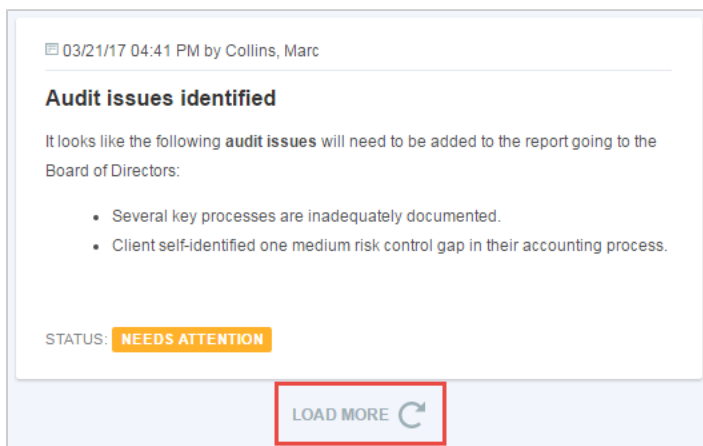
When a Status Update is edited and published, it appears in the Project Status News Feed with an "EDITED" tag in the upper right corner. Point to this tag to see who edited the update and when it was edited.



To delete a Status Update:

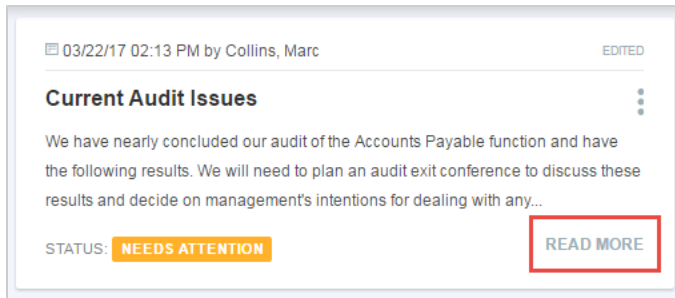
1. Point to the upper right corner of the status update message you want to edit and click on the Options  icon which appears.
2. Click **Delete**. OpenAir will ask if you are sure you want to remove the message.
3. Click **OK**.

By default, the Project Status News Feed displays 5 update messages when opened. Click the “Load More” button at the bottom of the update list to load additional messages.



A scrollbar will appear in the News Feed when there are many Status Updates to display so that you can scroll through the full list.

For status updates with large amounts of text, click “Read More” in the bottom right of the update to see all the text.



To close the Project Status News Feed, click anywhere outside of it.

Updating the Project Status News feed using OpenAir SOAP API, XML API or User Scripting

You can customize the project status news feed using the OpenAir SOAP API and OpenAir XML API. The APIs support reading, adding, modifying, upserting, and deleting news feed entries. For more information, see the Newsfeed, NewsfeedMessage and Project data types in [OpenAir SOAP API Reference Guide](#) and [OpenAir XML API Reference Guide](#).

You can also use the OpenAir user scripting features to generate status updates automatically by script using data from OpenAir or external applications and share information from project status news feed entries. For more information, see [OpenAir User Scripting Guide](#).

Outline, Gantt, and Task Detail Views

The Outline and Gantt views lets you oversee your project visually, and provides you with a drag-and-drop functionality to reorder tasks or create dependencies between tasks. All of your project's phases, tasks, and milestones are visible in these views. It is possible to use inline editing to change phase, milestone, or task names; predecessors; IDs; or start and end dates. You can edit selected tasks or phases in the Task Detail view.

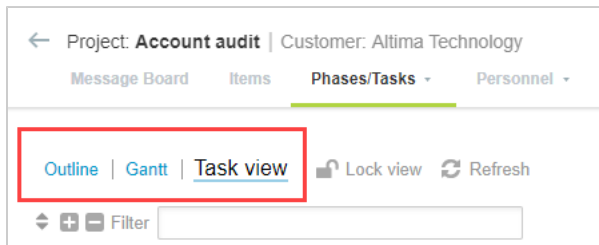
The Outline, Gantt, and Task Detail views can be found at Projects > Projects and clicking on a project name. If you have **QuickViews for Projects** enabled, you can point to a project name and select **Outline** or **Gantt** under Quick navigation > Project. If you have a large monitor, it is possible to view all three views on the same screen.

To enable these features, please contact OpenAir Support and request the **Enable Inline editing, Drag-n-Drop, enhanced Gantt layout in project outline view** switch.

Warning: If using the Outline, Gantt, and Task Detail Views, the **Gantt chart reordering sorts task IDs** switch must be disabled.

Note: Guest users can be given access to a project's Gantt chart without being given access to task details. When creating a guest role, there is a separate option **Guest can view task details in the Gantt/outline views**. If unchecked, the guest user will see the Gantt chart, but not the links to task details.

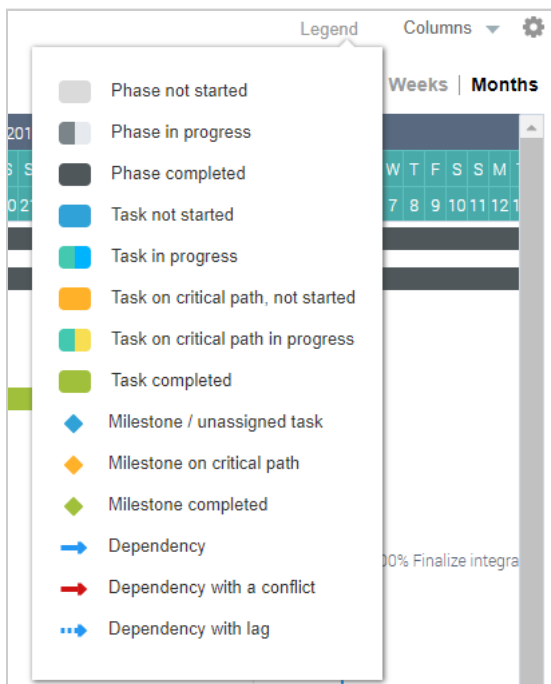
Navigating Between and Using Outline, Gantt, and Task Detail Views




When you have selected a particular project and chosen phase/task view, you can quickly switch between Outline view, Gantt view, and Task detail view using the navigation pane with the corresponding links.

Tip: Clicking on a phase, task, or resource in Outline view highlights it in grey. This highlighted record stays highlighted and in focus whenever you switch views. Furthermore, if Outline and Task Views are displayed together, you can use the up and down arrow keys on your keyboard to scroll through each task form.

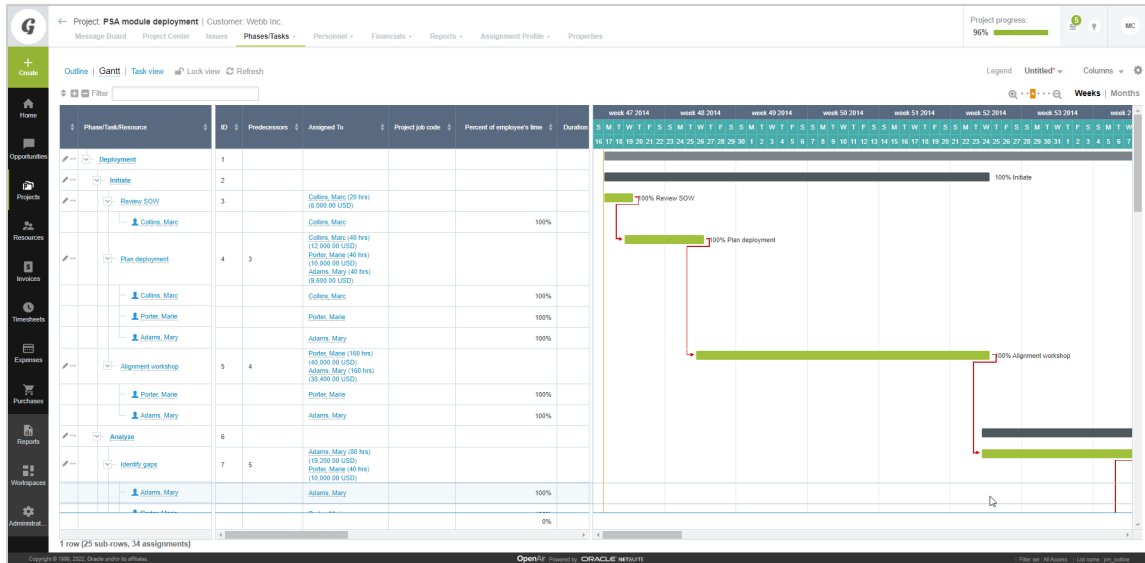
Point to **Legend** in the upper right to open a window describing the various colors and symbols used in Gantt View.









By default, Phases appear grey on the Gantt chart, tasks are light blue, and tasks on the critical path are orange. If you change the duration of a critical path task, it will alter the end date of the project.

Click the Cog icon  to open a menu which lets you Customize the list view, download list data, or use Task View with Outline View or with Gantt View.


Customizing Outline and Gantt Views








- You can change the zoom level in Gantt views by clicking the Zoom in  or Zoom out  icons in the upper right of the Gantt chart.
- You can change the scale to display either Weeks or Months.
- Columns in Outline View can be resized by dragging the column headers' edges.
- The results in each Outline View field can also be sorted. Clicking a column heading makes it the Primary sort criteria. Each time you click a new column heading, it becomes the primary sort criteria and the previous primary becomes the secondary. Clicking a third time sets a new primary, secondary, and tertiary sort field. The Primary sort criteria is indicated by a large green arrow next to the name, the Secondary sort criteria includes a smaller green arrow, and the Tertiary sort criteria uses the smallest green arrow. To sort by the default criteria, click the **Clear sort** icon .
- Click the Expand All  or Collapse All  icon to show or hide Phases, Tasks, and Resources in Outline view.
- Use the Filter to search and display phases, tasks, milestone, and resources with particular text strings in them. For example, if you type "Gate" into the filter field and hit **Enter**, Outline and Gantt views will display projects with names such as "Gate installation" or resources like "Gates, Jack."
- Data in Outline and Gantt Views can be refreshed by clicking the Refresh icon .

Resource Icons in Outline and Gantt View

Your Outline and Gantt view may include icons next to users assigned to particular tasks. The icons are:


-  **User, Jane** — Active resource currently assigned to the project.

-  **User, Jane** — Inactive resource who is currently assigned to the project. When a resource is inactive, they cannot login to the OpenAir account. These users cannot enter time, expenses, etc.
-  **Analyst [Generic]** — Active generic resource. Use generic resources when you know the type of resource needed but not the specific individual. Generic resources cannot record time or expenses and can only be used for forecasting.
-  **Analyst [Generic]** — Inactive generic resource.
-  **All employees [Assignment group]** — Active assignment group. Assignment groups are useful when there are tasks which need to be assigned to a large number of employees, such as for internal or administrative tasks. The hours set for an assignment group can either be split evenly among the group or kept the same across each employee in the group. Another potential use is for maintaining a group of interchangeable employees with similar skills for use in project tasks.
-  **All employees [Assignment group]** — Inactive assignment group.

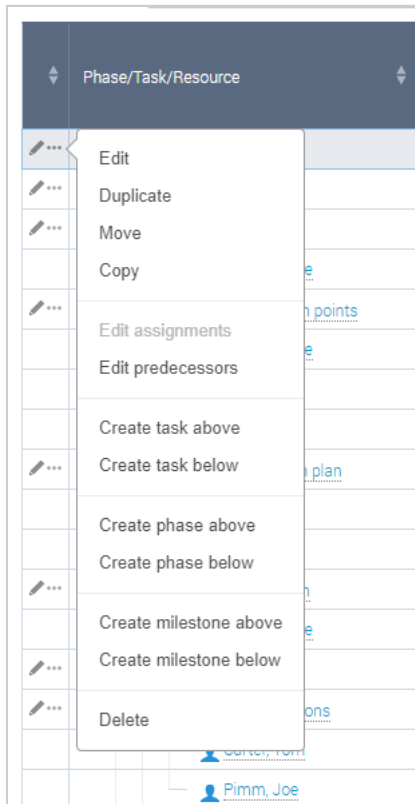
Creating a Phase, Task, or Milestone in Outline or Gantt View

There are two methods to create a phase, task, or milestone from the Outline or Gantt view.

To create a phase, task, or milestone in the Outline or Gantt view:

1. Do one of the following:
 - If there is at least one phase, task, or milestone in the Outline or Gantt view, click the more actions icon  on a phase, task, or milestone row, then click an option to create a phase, task, or milestone above or below that row.

Note: This method lets you create a phase, task, or milestone without leaving the Outline or Gantt view. You can also use this method to duplicate a phase, task, or milestone, or to move or copy it to another project.



- Otherwise, click the **Create** button, then click **Phase**, **Task**, or **Milestone** under Task/Phase.

Note: This method opens a form and navigates you away from the Outline or Gantt view. To create a phase, task, or milestone without leaving the Outline or Gantt view, use the previous method.

Editing a Phase or Task in Outline or Gantt View

You can edit phases and tasks and continue working as data is saved and updated in the Outline and Gantt chart. Editing a task and further actions are available when you right-click a task. Phases, tasks, and milestones can be reordered or moved from phase to phase in Outline View by dragging them where you would like. A green check mark indicates valid locations to move the phase, task, or milestone.

The screenshot shows the 'Task Detail View' for a task named 'Review SOW'. On the left is a table with columns 'Phase/Task/Resource', 'ID', and 'Booked employees'. The task 'Review SOW' (ID 3) is selected. On the right is a form with fields for 'ID*', 'Task name*', 'Priority', 'Part of phase', 'Project task type', 'Planned hours', 'Percent complete', 'Start date', and 'End date'. The 'Save' button is highlighted in green.

Phase/Task/Resource	ID	Booked employees
System integration	1	
Plan	2	
Review SOW	3	
Discuss integration points	4	
Finalize integration plan	5	Carr, Bill (Open)

Task Detail Form:

- ID*: 3
- Task name*: Review SOW
- Priority: 5
- Part of phase: 2. Plan
- Project task type: Regular
- Planned hours: 24
- Percent complete: 100% - complete
- Start date (MM/DD/YY):
- End date (MM/DD/YY):

To edit a phase or task:

1. Click the ellipsis icon next to a phase, task, or milestone to open a context sensitive menu from which you can edit phases and tasks and continue working as data is saved and updated in the Outline and Gantt chart. Phases, tasks, and milestones can be reordered or moved from phase to phase in Outline View by dragging them where you would like. A green check mark indicates valid locations to move the phase, task, or milestone.
2. Click the Edit icon next to a phase, task, or milestone to open and edit it in Task view.

Clicking **Edit** in the context menu opens a standard form allowing attributes to be changed. Calculated dates in Outline view can be overridden; hard dates which you enter inline in the Outline or in the task form are highlighted with green diamonds.

Note: Most inline changes are saved immediately, however, if for some reason it is taking longer to save, or if the save is having issues completing, the unsaved changes will be highlighted in purple.

If the **Enable user level outline view** switch is enabled, you can get detailed values for each Assigned To field in both Outline and Gantt views. This information provides an extended overview of and insight into the project and task assignments on a per user basis.

Tip: Phases and tasks are stored in the same database table: **project_task**. The difference is that for a phase, the **is_a_phase** field is set to 1 and the **start_date**, **planned_hours**, and **percent_complete** fields do not apply because they are computed from the child tasks.


Changing Assignments in Outline, Gantt, and Task Detail Views

The screenshot shows the 'Assignments for Review SOW' dialog. On the left is the same table as in the previous screenshot. On the right is a table with columns 'Assigned to', 'Percent of employee's time', 'Employees planned hours', and 'Hourly bill rate override'. The 'OK' button is highlighted in green.

Phase/Task/Resource	ID	Booked employees
System integration	1	
Plan	2	
Review SOW	3	
Discuss integration points	4	
Finalize integration plan	5	Carr, Bill (Open)



Assignments for Review SOW:

Assigned to	Percent of employee's time	Employees planned hours	Hourly bill rate override
Porter, Marie	100	24	USD
Select...	100		USD
Select...	100		USD

To modify task assignments click the **Edit assignments** in the context menu or the edit icon . When the option is selected, a standard configuration dialog appears on the right side of the screen and details can be edited according to the current OpenAir account configuration. After clicking the **OK** button, changes are reflected in the Outline/Gantt view.

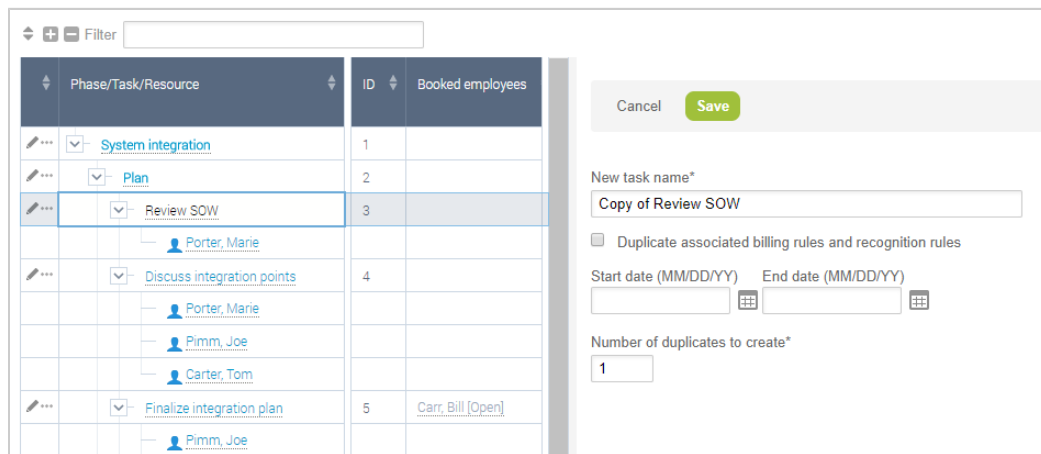
Duplicating and Copying a Task in Outline, Gantt, and Task Detail Views

To duplicate, copy or move a task:

1. Click the ellipsis icon  next to the task and select **Duplicate** to duplicate a task within the currently selected project.
2. Click the ellipsis icon  next to the task and select **Copy**


to copy a task to a different project. After creating a copy, you can also click **Save and Create another** to make multiple duplicates or copies.

Note: Checking **Copy associated billing rules and recognition rules** lets you carry over the corresponding details with the duplicate or copy.



The screenshot shows a task list on the left and a configuration dialog on the right. The task list has columns for Phase/Task/Resource, ID, and Booked employees. The task 'Review SOW' (ID 3) is selected. The configuration dialog has a 'New task name*' field with the value 'Copy of Review SOW'. There is a checkbox for 'Duplicate associated billing rules and recognition rules'. The 'Start date (MM/DD/YY)' and 'End date (MM/DD/YY)' fields are empty. The 'Number of duplicates to create*' field has the value '1'. The dialog has 'Cancel' and 'Save' buttons.

Phase/Task/Resource	ID	Booked employees
System integration	1	
Plan	2	
Review SOW	3	
Discuss integration points	4	
Finalize integration plan	5	Carr, Bill [Open]

3. Click the ellipsis icon  next to the task and select **Move** to move a task to another project without copying it.

Note: Copying and moving tasks can also include subtasks.

Direct Inline Editing in Outline, Gantt, and Task Detail Views

Inline editing lets you make changes to a field simply by clicking the value in the field itself and entering the new value. Changes are automatically saved when you click outside the active editing area or by pressing the **Enter** key.

Phase/Task/Resource	ID	Notes	Start
System integration	1		10/08/12
Plan	2		10/08/12
Review SOW	3		10/08/12
Porter, Marie			
Discuss integration points	4	Invite Rob to this meeting	10/11/12

The following items can be edited in this way:

- Phase, milestone, or task name
- ID
- Predecessor
- Start date
- End date
- Notes



Note: The field for Predecessor edits follows the following syntax: [Predecessor's ID] [Predecessor Type][lag #].

For example, 5ss-1 indicates that the predecessor is ID 5, has a Start-to-Start type, and a lag of -1 days.

You can indicate multiple predecessors by separating them with a semi-colon (;), for example: 5ss-1;6fs5.

You can disable editing in Outline and Gantt Views by clicking the Lock icon .

Making Changes in Gantt View


Gantt view provides visibility into a project's progress, coupled with the ability to easily modify tasks and phases.

You can also make changes directly in Gantt view with drag-and-drop functionality. For example, to set a finish-to-start dependency between tasks, drag the dependency from one task to the other. The system recalculates planned hours and utilization. Moving or extending a task in Gantt view automatically creates a fixed start and end date for it, rather than a calculated one.

Marking Tasks as “Non-billable” and Excluding From Project Budgets

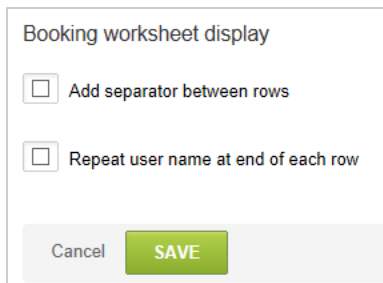
Non-billable tasks can be excluded from billing plans and budgets.

To exclude non-billable tasks from billing in project budgets:

1. Go to Projects > Projects and select a project.
2. Click the Edit  icon next to the task to make non-billable. The Task properties open.
3. Select "Non-billable task" in the Task properties.
4. Click **Save**.

When viewing your budget in Actuals, the Budget Grid, or Compare View, non-billable tasks are marked with grey icons. The Profitability, Billing Rate, and Total billing for these tasks will always be "-". These tasks will not enter into billing calculations.

Booking Worksheet Display



The dialog box titled "Booking worksheet display" contains two settings, each with an unchecked checkbox:

- ☐ Add separator between rows
- ☐ Repeat user name at end of each row

At the bottom, there are two buttons: "Cancel" and "SAVE" (highlighted in green).

The Booking worksheet is displayed as a link within a project if you select the Booking grid within the project stage. See [Project Stages](#). The options allow formatting of the worksheet for easier use by allowing employee names to be repeated on the right side of the worksheet for reference only and to space rows for easier viewing.

To access and modify the Booking worksheet display:

1. Go to Administration > Application Settings > Projects Settings > Booking worksheet display.
2. Check / uncheck the desired setting.
3. Click Save.

Advanced Booking Worksheet

The Advanced Booking Worksheet is a more streamlined, detailed, and visually-appealing worksheet for creating and managing bookings. The worksheet has the following features:

- Bookings appear under each resource.
- Bookings that cannot be edited because of their approval status show in light grey color.
- See resource utilization at a glance. Green, yellow, and red color-coded cells highlight underutilized, fully utilized, and overutilized resources.
- Point to a resource's name to open a resource QuickView.
- Display and edit booking information in daily, weekly, monthly, or many other more time periods.
- Drill down to greater levels of detail.
- Filter the worksheet by department, job code, project, or skills.

- Column and row totals showing total number of hours or percentages across all visible resources and all visible time periods.
- Resource utilization subtotals showing total number of hours or percentages for both the filtered set and all resource bookings when filters are applied.

Note: If the ability to edit bookings of a certain type is restricted by role, users whose role is selected in Administration > Application Settings > Resources Settings > Booking Types > [Booking Type] > Restrict booking editing by role will not be able to see bookings of that type in the Advanced Booking Worksheet.

OpenSubmittedApprovedRejectedAllWorksheetChartPlanner

ADD RESOURCE%

0 FILTERS

K < 06/07/21 - 07/12/21 >

DISCARD

SAVE & SUBMIT

SAVE

Resource	Client / Project	Booking type	Approval Status	Bookings	Week starting 06/07/21	Week starting 06/14/21	Week starting 06/21/21	Week starting 06/28/21	Week starting 07/05/21	Week starting 07/12/21	Total
Carr, Bill	Foster Software - ERP implementation	Pending	Submitted	1 booking	0.00 hrs	0.00 hrs	37.50 hrs	37.50 hrs	0.00 hrs	0.00 hrs	75.00 hrs
				1 booking	0.00	0.00	37.50	37.50	0.00	0.00	75.00 hrs
Collins, Marc	Altima Technology : CRM integration	Tentative	Approved	4 bookings	32.00 hrs	32.00 hrs	40.00 hrs	40.00 hrs	32.00 hrs	32.00 hrs	208.00 hrs
				1 booking	0.00	0.00	8.00	8.00	0.00	0.00	16.00 hrs
				1 booking	0.00	0.00	0.00	0.00	32.00	32.00	64.00 hrs
				1 booking	32.00	32.00	0.00	0.00	0.00	0.00	64.00 hrs
				1 booking	0.00	0.00	32.00	32.00	0.00	0.00	64.00 hrs
Consultant [Generic]	Altima Technology : CRM integration	Pending	Submitted	4 bookings	40.00 hrs	40.00 hrs	32.00 hrs	32.00 hrs	40.00 hrs	40.00 hrs	224.00 hrs
				1 booking	0.00	0.00	16.00	16.00	0.00	0.00	32.00 hrs
				1 booking	0.00	0.00	16.00	16.00	0.00	0.00	32.00 hrs
				2 bookings	40.00	40.00	0.00	0.00	40.00	40.00	160.00 hrs
Davis, Judy	Webb Inc. : PSA module deployment	Tentative	Approved	3 bookings	40.00 hrs	40.00 hrs	8.00 hrs	8.00 hrs	24.00 hrs	24.00 hrs	144.00 hrs
				3 bookings	40.00	40.00	8.00	8.00	24.00	24.00	144.00 hrs
PM [Generic]	Altima Technology : CRM integration	Open	Open	4 bookings	32.00 hrs	32.00 hrs	48.00 hrs	48.00 hrs	30.00 hrs	30.00 hrs	220.00 hrs
				1 booking	0.00	0.00	10.00	10.00	0.00	0.00	20.00 hrs
				3 bookings	32.00	32.00	38.00	38.00	30.00	30.00	200.00 hrs
Porter, Marie	Webb Inc. : PSA module deployment	Tentative	Approved	3 bookings	32.00 hrs	32.00 hrs	32.00 hrs	32.00 hrs	40.00 hrs	40.00 hrs	208.00 hrs
				3 bookings	32.00	32.00	32.00	32.00	40.00	40.00	208.00 hrs
Total					280.00 hrs	287.33 hrs	350.17 hrs	362.30 hrs	225.20 hrs	222.00 hrs	1,727.00 hrs



To enable the Advanced Booking Worksheet:

- Please contact OpenAir Support and request the “Advanced Booking Worksheet” feature.
- Confirm that you have enabled the Resource Planner feature. If not, please contact OpenAir Support and request the “Resource Planner” feature.
- Assign role permissions for non-administrators who will use the Advanced Booking Worksheet. The necessary role permissions are:
 - View and modify bookings
 - View resource planner

To open the Advanced Booking Worksheet:

- Once the required features are enabled, navigate to Resources > Bookings > Worksheet.

Using the Advanced Booking Worksheet

The Booking Worksheet appears as a table with each resource listed in the leftmost column. Point to a resource name to open a QuickView window with various booking-related actions you can perform. You can expand each resource's worksheet rows by clicking the  icon next to their name, or collapse the details by clicking the  icon.

Resource		Task
Client : Project		
+	Thompson, Jane	
-	Collins, Marc	
⋮	Altima Technology : Test	2: Review SOW
⋮	Altima Technology : Test	3: Configuration
⋮	Altima Technology : Test	4: Testing

The Bookings column shows the total number of visible bookings for a resource or per each worksheet row. To see which bookings are visible in the row and their status, click the worksheet row's bookings cell link.

Each period cell contains a colored bar along the top to indicate the resource's utilization. The colored utilization bars use the same color scheme as in the Booking Planner.

Note: Utilization over 100% is always colored red.



In addition, period cells may contain a triangular icon with more information.

- Green icon – Cell includes a note
- Yellow icon – Cell includes multiple consolidated bookings
- Grey icon – There is one booking with no note

Note: Consolidated booking by day totals in each cell are hard-coded. Multiple bookings may be totaled in each period cell, and bookings may be reconfigured or created when any change is submitted.

Click the triangular icon to open a dialog with details about the bookings within that period cell. Point to the booking name in the dialog to open a booking QuickView. Click the edit icon in the dialog to add or edit a note for the booking.

The screenshot shows a booking dialog box titled "Booking from 12/01/14 to 12/07/14 for 83% of the time". The dialog contains the following information:

- Name:** Carter, Tom
- Requester:** Collins, Marc
- Booked utilization:** 83%
- Client:** Webb Inc.
- Start - Finish:** 12/01/14 - 12/07/14
- Project:** BI tool installation
- Location:**
- Task:** Define data migration plan

Below the booking details, there are two sections:

- Action links:** New booking
- Quick navigation:**
 - Employee
 - Demographic
 - Schedule
 - Resource
 - Calendar
 - Profile
 - Utilization
 - Engagement history
 - Time off requests
 - Leave accrual

The background shows a grid of booking cells with various utilization percentages and booking counts.

Select a date range to display using the date selector at the top of the worksheet. You can also choose to display and enter bookings per time period as a percentage of utilization or number of hours.



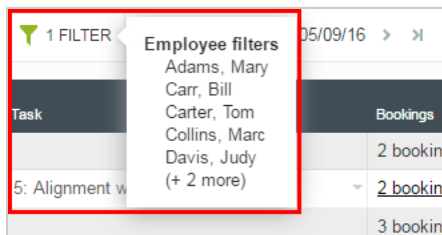
Resource utilization subtotals are visible for both the filtered set and all resource bookings when filters are applied in the advanced booking worksheet.

When filters are applied, resource utilization subtotals show two values :

- The value for all resource bookings, without any filters applied, shown in bold.
- The value for the current set of resource bookings, with the filters applied, if different from the value for all resource bookings, is shown immediately underneath the subtotal for all resource bookings .

Open Submitted Approved Rejected All Worksheet Chart Planner										
				ADD RESOURCE	%	1 FILTER	06/07/21 - 07/12/21		DISCARD	SAVE & SUBMIT
Resource	Client - Project	Booking type	Approval Status	Bookings	Week starting 06/07/21	Week starting 06/14/21	Week starting 06/21/21	Week starting 06/28/21	Week starting 07/05/21	Week starting 07/12/21
Adams, Mary				3 bookings	24.00 hrs	24.00 hrs	76.00 hrs 36.00 hrs	76.00 hrs 36.00 hrs	8.00 hrs	8.00 hrs
Webb Inc. : PSA module deploymen		Confirmec	Approved	3 bookings	24.00	24.00	36.00	36.00	8.00	8.00
Collins, Marc				2 bookings	32.00 hrs	32.00 hrs	40.00 hrs 32.00 hrs	40.00 hrs 32.00 hrs	0.00 hrs	0.00 hrs
Webb Inc. : PSA module deploymen		Confirmec	Approved	1 booking	32.00	32.00	0.00	0.00	0.00	0.00
Webb Inc. : PSA module deploymen		Tentative	Approved	1 booking	0.00	0.00	32.00	32.00	0.00	0.00
Davis, Judy				3 bookings	40.00 hrs	40.00 hrs	8.00 hrs	8.00 hrs	24.00 hrs	24.00 hrs
Webb Inc. : PSA module deploymen		Tentative	Approved	3 bookings	40.00	40.00	8.00	8.00	24.00	24.00
Porter, Marie				3 bookings	32.00 hrs	32.00 hrs	32.00 hrs	32.00 hrs	40.00 hrs	40.00 hrs
Webb Inc. : PSA module deploymen		Tentative	Approved	3 bookings	32.00	32.00	32.00	32.00	40.00	40.00
Total					128.00 hrs	128.00 hrs	156.00 hrs 108.00 hrs	156.00 hrs 108.00 hrs	72.00 hrs	72.00 hrs
										712.00 hrs 610.00 hrs

A filter indicator at the top of the worksheet shows how many filters you currently have applied. Click the indicator to open a tooltip with a description of the filters.




The worksheet respects switch settings which prevent you from editing period cells which contain submitted bookings.


You can edit settings for the Booking Worksheet by clicking the icon.

The icon contains a menu from which you can add, copy, or delete worksheet rows.




To add worksheet rows in the Advanced Booking Worksheet:


1. Click the  icon and click "Add row".

 **Note:** If a resource was booked but did not appear on the worksheet because an applied filter hid them, their name will appear in the "Add resource" list. When you add these resources, define the worksheet row, save the changes, and refresh the page, they will be immediately filtered out from the worksheet.

To copy worksheet rows in the Advanced Booking Worksheet:

1. Click the  icon next to the row to copy, and click "Copy".


To delete worksheet rows in the Advanced Booking Worksheet:


1. Click the  icon next to the row to copy, and click "Delete".

To edit worksheet rows in the Advanced Booking Worksheet:

1. Click the cells which you would like to change and enter or select your changes. For example, click a booking type cell to change the booking type from "Open" to "Pending" for that booking.
2. To change a worksheet row's Client and Project, click a client and project in the Client : Project column to open a drop-down list where you can select different projects. Use the "Find more..." option to perform a search for a specific client or project.

To customize columns in the Advanced Booking Worksheet:

1. Go to the Advanced Booking Worksheet and click the  icon in the upper right corner of the worksheet. The "Booking worksheet settings" appears.
2. Select which columns you want to display in the "All" tab of the "Columns" section.
3. Clear selected columns in the "All" or "Selected" tab of the "Columns" section by clicking the name of the column.

 **Note:** Columns which are currently being displayed in the Advanced Booking Worksheet are highlighted green and appear with a check mark next to them.

4. Reorder columns by clicking and dragging the "Drag to reorder item"  icon at the right side of the column name
5. Click **Save**.

The booking details column can be hidden by clearing the “Show booking details column” option under “Options” in the “Booking worksheet settings” screen.

To Lock Toolbars, Headers, and Columns in the Advanced Booking Worksheet:

1. Go to Projects > Bookings > Worksheet.
2. Click the Column Lock icon at the top of the column which you want to keep in view when scrolling.

Open Submitted Approved Rejected All **Worksheet** Chart Planner

ADD RESOURCE % 0 FILTERS K <

These columns will remain in view when scrolling horizontally.

Resource	Task	Booking type	Feb-2014	Mar-2014	Apr-2014
Client : Project					
Adams, Mary			158.4 hrs	81.6 hrs	62.03 hrs
Altima Technology : 2016 October release	6: QA	Open	0	0	0
Altima Technology : Account audit	4: Phone calls	Confirmed	0	1.6	0
Altima Technology : Account audit	4: Phone calls	Confirmed	0	0	14.41
Altima Technology : CRM integration	22: Execute training	Open	0	0	41.61
Altima Technology : CRM integration	5: Finalize integration plan	Open	0	0	0


Note: All columns on the left side of the locked column will remain in view when scrolling horizontally.


To save changes and submit visible Open bookings to the next approval workflow status in the Advanced Booking Worksheet:

1. Click **Save** to save all modified data on the page, or click **Save and submit** to submit all visible Open bookings to the next booking approval workflow status.

Important: In some cases, the data displayed on the Advanced Booking Worksheet after you save your changes may not show the changes made. This is because OpenAir is still recalculating the resource utilization for the resources shown on the worksheet. A warning message appears after you save your changes to confirm that your changes have been saved but that the recalculation is still in progress. To view the updated booking worksheet data, allow some time before reloading the page. To view the last on-screen “booking(s) saved” or “recalculation pending” notification, click the Tips button then click **Review last notification**.

To set filters in Advanced Booking Worksheet:

1. Go to Resources > Bookings > Worksheet and click the Settings icon .
2. Click the > **Create** link next to the filters you want to set.

 **Options**

These filters will limit the worksheet to bookings with the selected resource attributes

Resource filter	> Create
Department filter	> Create
Job code filter	> Create
Project filter	> Create
Profile type filter	> Create
Booking type filter	> Create
Project owner filter	> Create
Cost center filter	> Create
Project stage filter	> Create
Client filter	> Create
Manager of the resource filter	> Create
Utilization filter	> Create
Employee's Status filter	> Create
Employee's Allow NetSuite Single Sign-On filter	> Create
Employee's Export folders from this employee to the NetSuite parent vendor filter	> Create
Employee's Export folders from this employee as NetSuite vendor bills filter	> Create

3. Select the filter settings and click **OK**.

The utilization filter lets you filter for resources with more or less than a certain utilization percentage in any of the visible booking periods. For example, select **More than 80%** and **Less than 30%** to list only those resources with more than 80% utilization or less than 30% utilization in any of the booking periods in the selected date range.

Utilization

Available

- More than 100%
- More than 90%
- More than 80%**
- More than 70%
- More than 60%
- Less than 100%
- Less than 90%
- Less than 80%
- Less than 70%
- Less than 60%

Add selected > Add all >

Selected

- More than 80%**
- Less than 30%**

< Remove selected < Remove all

1 FILTER

Utilization filters

Less than 30%




More than 80%

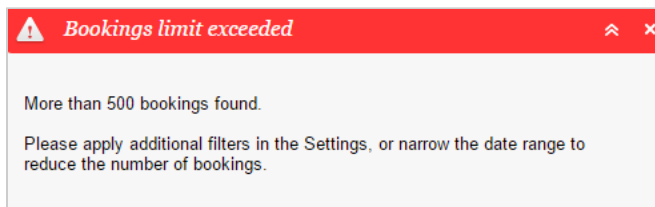
2019-12-30 > < DISCARD

Week starting	Week starting	Week starting	Week starting	Week starting
2019-10-28	2019-11-04	2019-11-11	2019-11-18	2019-11-25
0,00%	0,00%	0,00%	100,00%	100,00%
0,00%	0,00%	0,00%	50,00%	50,00%
0,00%	0,00%	0,00%	20,00%	0,00%

Advanced Booking Worksheet Optional Functionality and Settings

The following optional features modify the default Advanced Booking Worksheet functionality:

- Detailed booking groups** — When this feature is enabled, bookings grouped under a single row have the same values for all fields except the note, start date and end date fields, even if the columns are not shown on the worksheet. By default bookings grouped under the same worksheet row have the same values in the visible worksheet columns but may have different values in the hidden columns. See  [OpenAir Optional Features Book](#).
- Restrict utilization calculation to resources impacted by changes** — With this feature enabled, the utilization is recalculated only for the resources that are impacted by these changes instead of all shown resources. Labels indicate when the calculation is in progress, completed or if changes have been made by another user. See  [OpenAir Optional Features Book](#).
- Require a job code** — When this feature is enabled, a job code is required when you create or modify a booking using the Advanced Booking Worksheet. See  [OpenAir Optional Features Book](#).
- Maximum number of bookings displayed** — By default, the Advanced Booking Worksheet displays up to 500 bookings. A warning appears when you reach the maximum number of bookings that can be displayed. You can use the date range and filters to reduce the number of bookings.




To change the maximum number of bookings displayed, contact OpenAir Customer Support and request to increase the maximum number of bookings to 1,000, 1,500, or 2,000. Note there is always a trade off between the number of items shown and the page performance.

Charge Projections

Charge projection options provide forecasting of financials within OpenAir. Report values in Summary reports called “Projected xxx” are populated based on the charge projection settings. Charge projections are based on information from the project details and the billing rules set on the project.

The Settings you select are determined by the process by which you allocate resources to a project. Accurate resource allocation provides reliable financial forecasting. If you are not using the Resources application, then the booked hours options do not display in the charge projection selections.

You can run charge projections for a specific time frame by defining a start and end date. Any Projected xxx values prior to the start date of projections are zero. Charge projections may be run for both billing or billing and recognition by selecting the Create recognition projections option. You can also run projections on a relative date range such as from Today forward X number of days.

 **Note:** The following switches affect charge projections settings. To enable them, please contact OpenAir Support.

- Allow charge projections to be run for individual projects** — adds a **Run charge projections** link to the Tips section on each individual project Properties form. Charge projections will be run using the criteria set in Administration > Projects Settings > Charge Projections.

- **Do not use booked or assigned hours before today when running charge projections using approved/worked and booked/assigned** — ignores booked/assigned hours in the past regardless of whether time has been entered on a timesheet for approved/worked charge projections.
- **Enable the feature to exclude specific projects from projections using custom field `exclude_from_projections`** — when enabled, an 'exclude_from_projections' custom field is created. You can select this in a project's properties to disable projections from this particular project. Enabling this switch may improve performance.

To access and modify Charge Projections:

1. Go to Administration > Application Settings > Projects Settings > Charge projections.

Cancel
Save

Status

Global charge projections and recognition projections were last run at 07/16/12 02:46 PM

Project charge projections and recognition projections were last run at 01/30/12 10:40 AM for the Damus Inc. : Payroll integration project

Settings

Charge projections hours are from

- ☐ Assigned hours
- ☒ Booked hours
- ☐ Approved hours
- ☐ Worked hours
- ☐ Approved and booked hours
- ☐ Approved and assigned hours
- ☐ Worked and booked hours
- ☐ Worked and assigned hours

Projections filter

Limit the creation of projections to specific project stages and project's active status. These filters are ignored if projections are generated for a single project from its properties form

☐ Include inactive projects

Project stage [Create](#)

Date range

Projections will be generated for the specified range. You can use a relative or an [absolute](#) range

Start Duration (days)

Recognition

☒ Create recognition projections

Run charge projections

☐ Run charge projections now ☒ Automatically run the charge projections

Day at Hour Minute

Times are in U.S. Eastern Time.

Cancel
Save

Status

The Status section of the Charge projections form shows when the last global and project charge and recognition projections were run, or if they are currently running (see [Run charge projections](#)).

Settings

You can set the following Charge Projections settings in the **Charge projections** form:

- Assigned hours — hours are taken from the number of hours each user is assigned to the project.



Important: Assignments are different from bookings, and this setting only applies assignments to projects.

- Booked hours — hours are taken from user bookings, based on the bookings setup in the Resources module.



Important: As with Assigned hours, bookings are different from assignments, so this setting only applies bookings to projects.

- Approved hours** — hours from timesheets which have been approved.
- Worked hours** — hours which users have logged to the project on a timesheet, which may **not** have been approved.
- Approved and booked hours** — for each user, approved hours are used until the last date of approved hours, and then booked hours are used. If no approved hours exist, only booked hours are used.
- Approved and assigned hours** — for each user, approved hours are used until the last date of approved hours, and then assigned hours are used. If no approved hours exist, only assigned hours are used.
- Worked and booked hours** — for each user, worked hours are used until the last date of worked hours, and then booked hours are used. If no worked hours exist, only booked hours are used.
- Worked and assigned hours** — for each user, worked hours are used until the last date of worked hours, and then assigned hours are used. If no worked hours exist, only assigned hours are used.

Projections filter

You can limit filtering based on project stages and limit the process to currently active projects. By default, inactive projects are excluded from projections, so no values are generated for them when these are run. You can add inactive projects by selecting **Include inactive projects** in the **Projections filter** form.



Date range

Project charge projections are flexible. Using a toggle function, you can enter specific start and end dates or relative date ranges such as “tomorrow” or “next month”. Projections are then generated for the range you’ve set.

The default display includes specific **Start** and **End** dates. To select a relative range, click the **relative** link in the Date range description. This changes the entry fields to **Start** and **Duration**. Then, select your start time and enter the exact number of days in the Duration field. To return to an absolute range display, click the **absolute** link in the Date range description.

Date range Absolute Date Range (default) Click this link to select a relative date range

Projections will be generated for the specified range. You can use a **relative** or an absolute range

Start (MM/DD/YY)  End (MM/DD/YY)  Select the Start and End dates


Date range Relative Date Range Click this link to select an absolute date range

Projections will be generated for the specified range. You can use a relative or an **absolute** range

Start Duration (days) Select the Start date and type the duration in days

Run charge projections

In this section of the Charge Projections form, you can choose to manually run a charge projection now or activate forecasting by setting up automatic charge projections. Whenever projections are run, data on hours and money which would be generated from billing and/or recognition rules are updated based on current bookings, assignments, timesheet hours, billing rules, and recognition rules.

 **Important:** Billing rules are required to create charge projections. Ensure you have created billing rules for Clients : Projects.


To Manually Run a Global Charge Projection

1. Select **Run charge projections now** and click **Save**.

By default, selecting **Run charge projections now** generates global charge projections for all projects.

To Manually Run a Charge Projection for a Specific Project

1. Open the project you want a charge projection for.
2. Navigate to the project's **Properties** section and click the **Tips** button on the left side of the screen.
3. Select **Generate charge projections for this project**.

 **Note:** Project-specific charge projections cannot be created while global projections are running.

To Set Projections to Run Automatically

1. Select **Automatically run the charge projections**.
2. Select the day, hour, and minute when the charge projection should run. All times are in U.S. Eastern Time.
3. Click **Save**.

It is important to run the charge projections and refresh the form to make sure that the projections were actually run before using the corresponding forecasting reports. To check when charge projections were last run, navigate to Administration > Application Settings > Project Settings > Charge Projections >

Status (see [Status](#)). If a charge projection is currently running, “Global charge projections and recognition projections are **currently running**” will appear in the **Status** section of the Charge projections form.

Charge Projections Reporting

Charge Projections Summary Reports

When you have set up billing rules and charge projections options, you can use their corresponding reporting values in summary reports. Examples of commonly-used summary reports for charges based on current settings include:

- [Account-wide] — Projects
- [Account-wide] — Company
- [Account-wide] — Clients

To set up the time range used in the reports, configure the **Period size**, **Number of periods**, and **Date** fields.

The screenshot displays the 'Crosstabled > Account-wide > by Project' report configuration interface. On the left, a sidebar lists 'Dimensions' (Account-wide) and 'Measures' (Project-specific). The main area shows 'Rows' (Selected sub-totals) with 'Project' selected, and 'Columns' (Selected sub-totals) with 'Date (Monthly)' selected. A red callout box points to the 'Date (Monthly)' dropdown, containing the text: 'Click here in the Next-Generation Reporting Editor to configure Period size, number of periods, and date'. Below the 'Date (Monthly)' dropdown, a configuration panel is visible with the following settings: 'Period size: Monthly', 'Number of periods: 3', 'Date: Today', and radio buttons for 'This is the Start date' and 'This is the End date'.

Then, choose the corresponding fields which should be calculated in the report. The following are examples of common fields in this type of report:

- Projects — Projected cost [loaded cost type] [rules] — takes hours from charge projections which were generated using billing rules, with the corresponding loaded cost type applied. Field type: money

- Projects — Projected billable hours [rules] — hours from charge projections which were generated using billing rules. Field type: hours
- Projects — Projected billing [rules] — money from charge projections which were generated using billing rules. Field type: money
- Projects — Projected billing margin cost [loaded cost type] [rules] — money from charge projections minus the hours from charge projections times the hourly loaded cost. Field type: money


Charge Projections Detail Reports

In addition to the Charge Projections Summary Reporting, you can use an additional detail report: Projects — Charge projections. This report is for projected charges based on a project's billing rules. You could use this report to get projections per transaction and filter it depending on the information you need.

You can set your desired date range, and set up conversions on different bases in **Forex conversions and User loaded cost determination** (click the Settings tab if using the Report Manager and Editor optional feature). Any report value which requires a foreign exchange conversion will use that date as the exchange rate date. This date will also dictate the date used for the currency conversion of user-loaded costs for any cost reporting value.

Billing

In OpenAir, you can set up detailed billing rules on a project-specific basis. Once you have created a billing rule and run it, OpenAir creates charges based on the rule which can then be used in invoices.

<div>  Project: Add-on services Client: United Software </div> <div> Message Board Project Center Action Items Phases/Tasks Personnel Financials Reports Assignment Profile Properties </div> <div> Project status: NOT AVAILABLE Project progress: 63% </div>																																																											
<div> Create </div> <div> Home Appointments Projects Resources Invoices Timesheets Expenses Purchases Reports ... </div>																																																											
<div> Billing Rules Run Auto-Run Transactions </div> <div> Untitled </div>																																																											
<table> <tr> <th>Actions</th><th>Name</th><th>Type</th><th>Active</th><th>Position</th><th>Description</th><th>Last run date</th><th>Charge stage</th><th>Service</th><th>Customer PO</th></tr> <tr> <td></td><td>All</td><td>All</td><td>All</td><td></td><td></td><td>All</td><td>All</td><td>All</td><td>All</td></tr> <tr> <td></td><td>Bill expenses at cost</td><td>Expense item</td><td></td><td>1</td><td>Bill expenses Exclude non-billable receipts Exclude receipts assigned to non-billable tasks Service: Expenses Charge stage: Invoice Ready Customer PO: PO38811009</td><td>2016-07-27</td><td>Invoice Ready</td><td>Expenses</td><td>PO38811009</td></tr> <tr> <td></td><td>Bill 3rd-party costs with 15% markup</td><td>Purchase item</td><td></td><td>0</td><td>Bill fulfilled purchase items Mark up/down: 15% Default service: 3rd-party/purchases Charge stage: Invoice Ready Customer PO: PO38811009</td><td>2016-07-27</td><td>Invoice Ready</td><td>3rd-party/purchases</td><td>PO38811009</td></tr> <tr> <td></td><td>Bill time at 2009 hourly rates</td><td>Time</td><td></td><td>1</td><td>Bill time using the rates from the "2010 hourly rates" rate card Charge stage: Invoice Ready Customer PO: PO38811009</td><td>2016-07-27</td><td>Invoice Ready</td><td></td><td>PO38811009</td></tr> </table>										Actions	Name	Type	Active	Position	Description	Last run date	Charge stage	Service	Customer PO		All	All	All			All	All	All	All		Bill expenses at cost	Expense item		1	Bill expenses Exclude non-billable receipts Exclude receipts assigned to non-billable tasks Service: Expenses Charge stage: Invoice Ready Customer PO: PO38811009	2016-07-27	Invoice Ready	Expenses	PO38811009		Bill 3rd-party costs with 15% markup	Purchase item		0	Bill fulfilled purchase items Mark up/down: 15% Default service: 3rd-party/purchases Charge stage: Invoice Ready Customer PO: PO38811009	2016-07-27	Invoice Ready	3rd-party/purchases	PO38811009		Bill time at 2009 hourly rates	Time		1	Bill time using the rates from the "2010 hourly rates" rate card Charge stage: Invoice Ready Customer PO: PO38811009	2016-07-27	Invoice Ready		PO38811009
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Types of Billing Rules

OpenAir has five types of billing rules:

- **Time billing rule** — These rules are applied to your employees' time entries which are associated with a project. Only approved time entries are used by this rule.
- **Expense item billing rule** — These rules are applied to approved receipts associated with a project.
- **Fixed fee on date or milestone** — Use these rules to create a fixed fee or repeating fixed fee for a project. This rule is useful for charging monthly flat rates to clients for work on a specific project.

- **Fixed fee on % complete** — Use these rules to bill a certain amount when a project, project phase, or project task reaches a set percentage of completion.
- **Purchase item billing rule** — Use these rules to bill purchases made through the OpenAir purchases module.

Billing Rule Forms

Use the Billing Rule form to set the parameters for your billing rules. Each billing rule type has its own form:

Time Billing Rule Fields

Time billing rule

Currency

USD

Date range

Billing rates

Get the billing rates from

Employees

If you change this value, please wait for the form to repaint

Override employee rates

Carter, Tom : US\$240/hr

Select...

Select...

[Add rows]

Rate (money)

300

/

Hr

/

Hr

/

Hr

Billing rate multiplier

If you enter a number the billing rate will get multiplied by it.
Overridden rates will not be multiplied.


Daily rate multiplier

The billing rate will be multiplied by the daily multiplier.
All rates, including over-ridden rates will be multiplied.

Day	Multiplier
Monday	<div>1</div>
Tuesday	<div>1</div>
Wednesday	<div>1</div>
Thursday	<div>1</div>
Friday	<div>1</div>
Saturday	<div>1</div>

- **Currency** — If your account uses multi-currency, use this list to select the currency you want the billing rule to be run with.
- **Date range** — If needed, enter a start and end date for the time when the billing rule will be in effect. If milestones have been created for the project, you can also select one of these milestones rather than a date.

- **Billing rates** — You can get billing rates from one of four places:
 - **Employees** — If you select Employees from the menu, you can override your employees' assigned billing rates for their timesheet time entries associated with a project. Select the employee from the lists, and enter the new billing rates. If you need more rows, select the number of rows from the "[Add rows]" list.
 - **Rate cards** — If you select Rate cards, you can choose to apply any rate card by selecting it from the "Rate card" list.

 **Note:** If the rate card does not include a rate for a specific employee, that employee's default billing rate is used.

- **Services** — If you select Services, you can override default service rates by selecting the service from the lists provided and entering the new billing rates. If you need more rows, select the number of rows from the "[Add rows]" list.
- **Job codes** — If you select Job codes, you can override default rates by job code by selecting the job code from the lists provided and entering the new billing rates. If you need more rows, select the number of rows from the "[Add rows]" list.

The screen will refresh when changing from one Billing rate option to another.

You can type a Billing rate multiplier to apply to Employee or Service rates which have not been overridden by the settings above.

- **Daily rate multiplier** — Use these fields to enter rate multipliers which apply to specific days of the week. This setting affects all rates, including overridden ones.
- **Rounding rules** — For employees' timesheet time entries which are associated with the project, you can round up the number of hours for billing purposes.

For example, if you bill by the day or half-day only, you could set up rules so that any time entries that are less than 4 hours are rounded up to 4 hours, and any time entries that are between 4 and 8 hours are rounded up to 8 hours.

For example, to bill by day or half-day, the rounding rules could be set up as follows:

1. **Hours >** is set to 0, **Hours <=** field is set to 4, **Round to** field is set to 4.
2. **Hours >** field is set to 4, **Hours <=** field is set to 8, **Round to** field is set to 8.

Rounding is done on the daily total of hours for the project in question only.

- **Billing rule filters** — Use these filters to limit the billing rule to certain employees, time types, or services. To create a filter for a particular item, click on its ">Create" button. In the dialog box, select the items you want from the "Available items" list, click "Add Selected >", and click OK.
- **Rule Cap** — Set a cap to limit the total amount billed by the billing rule. Caps for time billing rules can be set by hours or by money.

You can also set whether a cap prompts you to adjust time entries to fit under the cap or prevent billing of time entries which exceed the cap:

- **Adjust time entries to fit under the cap** — If selected, when billings by money or hours exceed the cap, the billing run will give you the option to create charges only up until the cap is reached, based on the dates or order of the time entries. If this option is not selected, and billings exceed the cap, no billing will be generated.

The cap limits the total amount billed by the rule. The next time you run billing, the cap will account for any existing charges created with this rule when it calculates whether time entries can be billed.

For example, if you set the cap to \$6,000 and select this option, and the first set of charges created in the rule total \$5,000, the next time you run project billing, you will only have the option to create charges for time entries up to a total of \$1,000. If billing is later run and the next set of charges add up to \$1,500, a total of \$1,000 would be billed.

If the option was not selected, nothing would be billed. In either case, any remaining receipts, purchases, and time entries over the cap would not be billable.

When running billing with this option selected, the Description column will say "Adjusted for cap" for transactions which have not been fully billed.

- **Do not bill time entries that exceed the cap** — This rule affects billing when sequential billing rules exist. If selected, when the cap is reached, no further billing takes place. If this option is not selected, transactions exceeding the cap will pass to successive billing rules, if they exist, for further processing.

This option should not be used if, for example, you have a time billing rule at a \$250 per hour rate up to a cap, and a second billing rule with a discount rate for time which exceeds the cap.

- **Time period cap** — The time period cap limits the number of hours billed for the time period. Type the number of hours and select the time period from the list. Select "Apply the cap on a per employee basis" to apply the cap separately to each employee (for example, each employee has their own 40-hour cap), rather than one cap for all employees (for example, all employees combined time must be under 180 hours).
- **Other Settings**

- **Name** — You can give the billing rule a name. If this field is cleared, a default name will be assigned. The default name has the following format: "[type] billing rule [#]". For example, a new expense item billing rule's default name would be "Expense item billing rule 1".
- **Billing rule position** — With this option, set the order in which each rule will be applied when you run project billing.

For example, you may want a specific time billing rule to run first, then a second, more general time billing rule to any time entries not affected by the first rule.



Note: The position of billing rules is important. If a very general rule (for example, one which is simply "Bill expenses" or "Bill time at the employee(s) billing rate") is positioned before a more specific rule, the specific rule will never process time entries picked up by the previous rule.

- **Charge description** — Enter a description of the billing rule, if desired. This description will be added to explanation of each billing rule in the "Rule" column of the "Billing rules" list for the project. It will also appear in the "Description/Notes" field of the item in the resulting invoice.
- **Charge stage** — If you want charges created by the billing rule to be assigned a specific charge stage, choose the stage from this list.
- **Agreement** — If you want charges created by the billing rule to be assigned to a specific agreement, choose the agreement from this list. The agreement must be associated with the project.
- **Customer PO** — If you want charges created by the billing rule to be assigned to a specific customer purchase order, choose the purchase order from this list. The customer PO must be associated with the project.
- **Service** — Associates a service to any charges created by the billing rule.
- **Use the selected service if the time entry does not have a service** — If a time entry does not have a service, use this option to assign this time entry to a service. Select the service from the "Service" list or lists.
- **Always use the selected service** — This option always assigns time entries to a service selected from the "Service" list or lists, overriding any other service choices.
- **Notes** — Add a description for the billing rule in this field. The description will appear in list views.
- **Exclude time from archived timesheets** — Select this option if you do not want time from archived timesheets to be included when running this billing rule.

- ☐ **Active billing rule** — Clearing this option deactivates the billing rule. It is selected by default.

Expense Item Billing Rule Fields

- Currency** — If your account uses multi-currency, use this list to select the currency you want the billing rule to be run with.
- Date range** — If needed, enter a start and end date for the time when the billing rule will be in effect. If milestones have been created for the project, you can also select one of these milestones rather than a date.
- Mark up/down** — Use this setting to create billing rules which mark up or mark down expense items in receipts associated with a project. Enter a markup or markdown as a percentage of the cost, or as a fixed monetary amount. The markdown is applied on a per-unit basis.

Note: Enter a negative number for a markdown.

You can also select a Markup service. If you select a service in the list, the markup will create a separate flat rate charge assigned to that service.

- Billing rule filters** — Use these filters to limit the billing rule to certain expense items. To create a filter for a particular item, click on its ">Create" button. In the dialog box, select the items you want from the "Available items" list, click "Add Selected >", and click OK.
- Receipt maximums** — Set maximums on a per-expense item basis in each individual billing rule. When the billing rule is run for a particular project, receipts which exceed the maximum will be reduced to the maximum amount specified.
- Cap** — Set a cap to limit the total amount billed by the billing rule. Expense billing rule caps are by money only.

You can also set whether a cap prompts you to adjust expenses to fit under the cap or prevent billing which exceed the cap:

- **Adjust receipts to fit under the cap** — If selected, when billings exceed the cap, the billing run will give you the option to create charges only up until the cap is reached, based on the dates or order of the expenses. If this option is not selected, and billings exceed the cap, no billing will be generated.

The cap limits the total amount billed by the rule. The next time you run billing, the cap will account for any existing charges created with this rule when it calculates whether receipts can be billed.

For example, if you set the cap to \$6,000 and select this option, and the first set of charges created in the rule total \$5,000, the next time you run project billing, you will only have the option to create charges for time entries or receipts up to a total of \$1,000. If billing is later run and the next set of charges add up to \$1,500, a total of \$1,000 would be billed.

If the option was not selected, nothing would be billed. In either case, any remaining receipts over the cap would not be billable.

When running billing with this option selected, the Description column will say "Adjusted for cap" for transactions which have not been fully billed.

- **Do not bill receipts that exceed the cap** — This rule affects billing when sequential billing rules exist. If selected, when the cap is reached, no further billing takes place. If this option is not selected, transactions exceeding the cap will pass to successive billing rules, if they exist, for further processing.

This option should not be used for situations when a certain amount of expenses are included in a fixed price billing and only expenses exceeding the cap are billed as incurred.

■ Other Settings

- **Name** — You can give the billing rule a name. If this field is cleared, a default name will be assigned. The default name has the following format: "[type] billing rule [#]". For example, a new expense item billing rule's default name would be "Expense item billing rule 1".
- **Billing rule position** — With this option, set the order in which each rule of a specific type (time or expense item) will be applied when you run project billing.



Note: The position of billing rules is important. If a very general rule (for example, one which is simply "Bill expenses" or "Bill time at the employee(s)' billing rate") is positioned before a more specific rule, the specific rule will never process time entries picked up by the previous rule.

- **Charge description** — Enter a description of the billing rule, if desired. This description will be added to explanation of each billing rule in the "Rule" column of the "Billing rules" list for the project. It will also appear in the "Description/Notes" field of the item in the resulting invoice.
- **Charge stage** — If you want charges created by the billing rule to be assigned a specific charge stage, choose the stage from this list.
- **Agreement** — If you want charges created by the billing rule to be assigned to a specific agreement, choose the agreement from this list. The agreement must be associated with the project.
- **Customer PO** — If you want charges created by the billing rule to be assigned to a specific customer purchase order, choose the purchase order from this list. The customer PO must be associated with the project.
- **Service** — Associates a service to any charges created by the billing rule.
- **Notes** — Add a description for the billing rule in this field. The description will appear in list views.
- **Subtract GST/HST from receipt** — If you are using the tax locations tax calculation method, select this option to subtract the GST and HST from the receipt total when the project billing is run.

- **Exclude non-reimbursable receipts** — Select this option to exclude non-reimbursable receipts from the billing rule.
- **Exclude non-billable receipts** — Select this option to exclude non-billable receipts from the billing rule. This option is selected by default.
- **Active billing rule** — Clearing this option deactivates the billing rule. It is selected by default.

Fixed Fee on Date or Milestone Billing Rule Fields

Fixed fee billing rule **Fixed Fee When System Ready for Production**

Amount (money) * Currency Date (MM/DD/YY) Or Milestone

Repeat billing rule [> Create](#)

Name

Charge description
This will appear on the invoice

Charge stage

Agreement

Customer PO

Service
Optional service to assign to the charge

Employee

The charge will be associated with the selected employee

Cost center

Notes

☒ Active billing rule

- **Amount and Date or Milestone** — Enter the amount for the fixed fee, and the date on which it should be billed. If milestones have been created for the project, you will be able to select one of these milestones rather than a date, if desired.

- **Repeat billing rule** — You can create a rule with a repeating fixed fee.

For example, if you wanted to bill a client a certain amount every month for work on a project, you could set up a fixed fee billing rule that will create a charge for the amount required every month. When you run project billing, the charges will be created with the dates specified by the billing rule and the intervals between any repeating fees - if the dates of the repeating fixed fees fall sometime in the future, they will not show up as billable items on the "Run billing" page until those dates are reached.

To create a repeating fixed fee:

1. Click on the **>Create** link to create a repeating fixed fee. The "Repeat" dialog appears.
2. Select the frequency and the interval for the fee. The "Repeat Every" interval will change to reflect the frequency selected.
3. Select an end date for the repeat fee or designate a specific number of repetitions.

4. Click **OK**.

- **Name** — You can give the billing rule a name. If this field is cleared, a default name will be assigned. The default name has the following format: "[type] billing rule [#]". For example, a new expense item billing rule's default name would be "Expense item billing rule 1".
- **Charge description** — Enter a description of the billing rule, if desired. This description will be added to explanation of each billing rule in the "Rule" column of the "Billing rules" list for the project. It will also appear in the "Description/Notes" field of the item in the resulting invoice.
- **Charge stage** — If you want charges created by the billing rule to be assigned a specific charge stage, choose the stage from this list.
- **Agreement** — If you want charges created by the billing rule to be assigned to a specific agreement, choose the agreement from this list. The agreement must be associated with the project.
- **Customer PO** — If you want charges created by the billing rule to be assigned to a specific customer purchase order, choose the purchase order from this list. The customer PO must be associated with the project.
- **Service** — Associates a service to any charges created by the billing rule.
- **Employee** — To associate a charge to a specific employee, select the employee from this list.
- **Cost center** — To associate a charge to a specific cost center, select the cost center from this list.
- **Notes** — Add a description for the billing rule in this field. The description will appear in list views.
- **Active billing rule** — Clearing this option deactivates the billing rule. It is selected by default.

Fixed Fee on Percent Complete Fields

Fixed fee billing rule **Fixed Fee on Percent Complete for Data Migration**

Amount (money) * Currency

Use the
☐ % complete for the project
☒ % complete for

% complete threshold

When the % complete is greater than or equal to the threshold the amount will be billed

Name

Charge description

This will appear on the invoice


Charge stage

Agreement

Customer PO

Service

Optional service to assign to the charge

Employee
 
The charge will be associated with the selected employee

Cost center

Notes

☒ Active billing rule

- Amount, % complete, and % complete threshold** — Enter the amount for the fixed fee. If phases have been created for the project, you will be able to specify whether the % complete should be based on the project as a whole, or on a particular phase. Enter the % complete threshold. When the % complete of the project or phase is greater than the threshold entered, the amount of the billing rule will be created as a charge upon running of the billing rule.
- Name** — You can give the billing rule a name. If this field is cleared, a default name will be assigned. The default name has the following format: "[type] billing rule [#]". For example, a new expense item billing rule's default name would be "Expense item billing rule 1".
- Charge description** — Enter a description of the billing rule, if desired. This description will be added to explanation of each billing rule in the "Rule" column of the "Billing rules" list for the project. It will also appear in the "Description/Notes" field of the item in the resulting invoice.
- Charge stage** — If you want charges created by the billing rule to be assigned a specific charge stage, choose the stage from this list.
- Agreement** — If you want charges created by the billing rule to be assigned to a specific agreement, choose the agreement from this list. The agreement must be associated with the project.
- Customer PO** — If you want charges created by the billing rule to be assigned to a specific customer purchase order, choose the purchase order from this list. The customer PO must be associated with the project.

- **Service** — Associates a service to any charges created by the billing rule.
- **Employee** — To associate a charge to a specific employee, select the employee from this list.
- **Cost center** — To associate a charge to a specific cost center, select the cost center from this list. This option is controlled by a switch. Please contact OpenAir Support to discuss enabling this feature.
- **Notes** — Add a description for the billing rule in this field. The description will appear in list views.
- **Active billing rule** — Clearing this option deactivates the billing rule. It is selected by default.

Purchase Item Billing Rule Fields

Purchase item billing rule

Currency

USD

Date range

Leave blank to include all dates in the billing rule. This is the fulfillment date of the purchase item

Start

Date (MM/DD/YY)

Or

Milestone

System ready for production

End

Date (MM/DD/YY)

Or

Milestone

System cut over

Mark up/down

Mark the unit price up or down by

10

%

Billing rule filters

Limit the billing rule to specific employees and products

Employee

> Create

Product

> Create

Employee's Status

> Create

Employee's Active Directory Authentication

> Create

Employee's Continent

> Create

Employee's Country 001

> Create

Cap

A cap will limit the total amount billed by the billing rule

Cap (money)


☒ Adjust purchase items to fit under the cap

- **Currency** — If your account uses multi-currency, use this list to select the currency you want the billing rule to be run with.

Note: When an expense billing rule generates a bill for a foreign currency expense in the same currency, the user-designated exchange rate will be used.

- **Date range** — If needed, enter a start and end date for the time when the billing rule will be in effect. If milestones have been created for the project, you can also select one of these milestones rather than a date.

- **Mark up/down** — Used with expense item billing rules and purchase item billing rules. Use this setting to create billing rules which mark up or mark down expense items in receipts or purchases associated with a project. Enter a markup or markdown as a percentage of the cost, or as a fixed monetary amount. The markdown is applied on a per-unit basis.

 **Note:** Enter a negative number for a markdown.

You can also select a Markup service. If you select a service in the list, the markup will create a separate flat rate charge assigned to that service.

- **Billing rule filters** — Use these filters to limit the billing rule to certain products. To create a filter for a particular item, click on its ">Create" button. In the dialog box, select the items you want from the "Available items" list, click "Add Selected >", and click OK.
- **Cap** — Set a cap to limit the total amount billed by the billing rule. Purchase item billing rule caps are by money only.

You can also set whether a cap prompts you to adjust receipts to fit under the cap or prevent billing of receipts which exceed the cap:

- **Adjust purchase items to fit under the cap** — If selected, when billings by money exceed the cap, the billing run will give you the option to create charges only up until the cap is reached, based on the dates or order of the receipts or purchases. If this option is not selected, and billings exceed the cap, no billing will be generated.

The cap limits the total amount billed by the rule. The next time you run billing, the cap will account for any existing charges created with this rule when it calculates whether receipts or purchases can be billed.

For example, if you set the cap to \$6,000 and select this option, and the first set of charges created in the rule total \$5,000, the next time you run project billing, you will only have the option to create charges for time entries or receipts up to a total of \$1,000. If billing is later run and the next set of charges add up to \$1,500, a total of \$1,000 would be billed.

If the option was not selected, nothing would be billed. In either case, any remaining receipts or purchases over the cap would not be billable.

When running billing with this option selected, the Description column will say "Adjusted for cap" for transactions which have not been fully billed.

- **Do not bill purchase items that exceed the cap** — This rule affects billing when sequential billing rules exist. If selected, when the cap is reached, no further billing takes place. If this option is not selected, transactions exceeding the cap will pass to successive billing rules, if they exist, for further processing.

This rule should also not be used for situations when a certain amount of expenses are included in a fixed price billing and only expenses exceeding the cap are billed as incurred.

- **Name** — You can give the billing rule a name. If this field is cleared, a default name will be assigned. The default name has the following format: "[type] billing rule [#]". For example, a new expense item billing rule's default name would be "Expense item billing rule 1".
- **Billing rule position** — Used with time and expense item billing rules. With this option, set the order in which each rule of a specific type (time or expense item) will be applied when you run project billing. For example, you may want a specific time billing rule to run first, then a second, more general time billing rule to any time entries not affected by the first rule.

Note: The position of billing rules is important. If a very general rule (for example, one which is simply "Bill expenses" or "Bill time at the employee(s)' billing rate") is positioned before a more specific rule, the specific rule will never process time entries picked up by the previous rule.

- **Charge description** — Enter a description of the billing rule, if desired. This description will be added to explanation of each billing rule in the "Rule" column of the "Billing rules" list for the project. It will also appear in the "Description/Notes" field of the item in the resulting invoice.
- **Charge stage** — If you want charges created by the billing rule to be assigned a specific charge stage, choose the stage from this list.
- **Customer PO** — If you want charges created by the billing rule to be assigned to a specific customer purchase order, choose the purchase order from this list. The customer PO must be associated with the project.
- **Service** — Associates a service to any charges created by the billing rule.
- **Notes** — Add a description for the billing rule in this field. The description will appear in list views.
- **Active billing rule** — Clearing this option deactivates the billing rule. It is selected by default.
- **Agreement** — If you want charges created by the billing rule to be assigned to a specific agreement, choose the agreement from this list. The agreement must be associated with the project.
- **Exclude non-reimbursable receipts** — Select this option to exclude non-reimbursable receipts from the billing rule.
- **Exclude non-billable receipts** — Select this option to exclude non-billable receipts from the billing rule. This option is selected by default.
- **Mark up/down** — Use this setting to create billing rules which mark up or mark down purchases associated with a project. Enter a markup or markdown as a percentage of the cost, or as a fixed monetary amount. The markdown is applied on a per-unit basis.

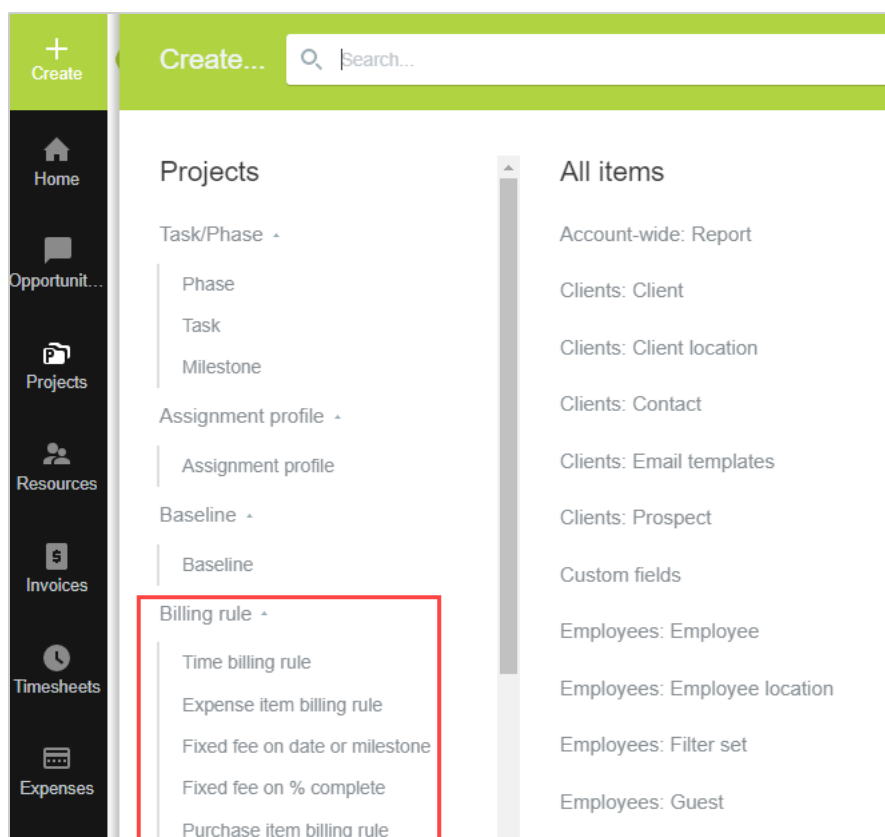
Note: Enter a negative number for a markdown.

You can also select a Markup service. If you select a service in the list, the markup will create a separate flat rate charge assigned to that service.

Creating, Editing, Copying, and Deleting Billing Rules

To create a billing rule:




1. Go to Projects > Projects > [select a project] > Financials > Billing > Rules. A list of existing billing rules appears.
2. Click the Create button and click the type of billing rule you want to create under "Billing rule". A form for the selected billing rule appears.



3. Set the parameters for the billing rule, and click **Save** or **Save & create another**.

To edit a billing rule:

1. Go to Projects > Projects > [select a project] > Financials > Billing > Rules. A list of existing billing rules appears.
2. Click on the name of the billing rule that you want to edit. You can also click the **Edit** icon in the Action column of the list view. The "Billing rule" form appears.

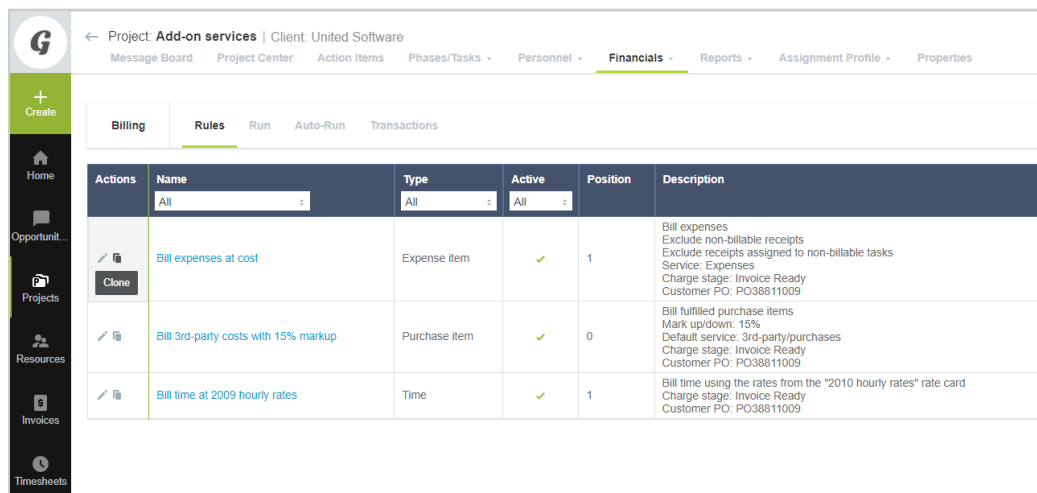
Billing					
Rules					
Actions	Name	Type	Active	Position	Description
	All	All	All		
	Bill expenses at cost	Expense item	✓	1	Bill expenses Exclude non-billable receipts Exclude receipts assigned to non-billable tasks Service: Expenses Charge stage: Invoice Ready Customer PO: PO38811009
	Bill 3rd-party costs with 15% markup	Purchase item	✓	0	Bill fulfilled purchase items Mark up/down: 15% Default service: 3rd-party/purchases Charge stage: Invoice Ready Customer PO: PO38811009
	Bill time at 2009 hourly rates	Time	✓	1	Bill time using the rates from the "2010 hourly rates" rate card Charge stage: Invoice Ready Customer PO: PO38811009

3. Make your changes to the rule's form and click **Save**.

To copy a billing rule:

1. Go to Projects > Projects > [select a project] > Financials > Billing > Rules. A list of existing billing rules appears.

- Click the **Clone** button in the Action column for the rule you want to copy. The billing rule will be duplicated and the copy's Billing Rule form will appear.

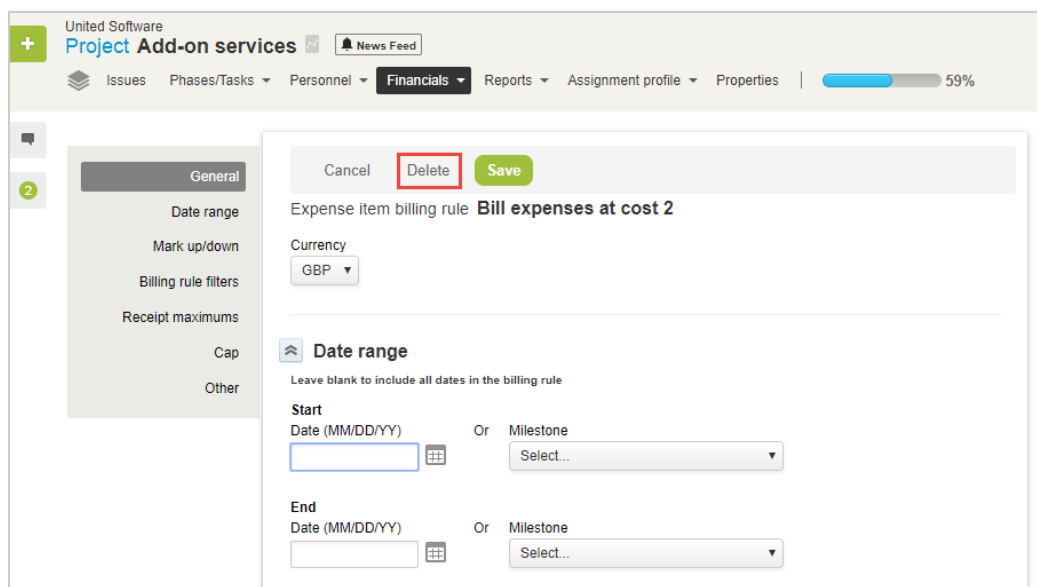


The screenshot shows the 'Billing' tab with the 'Rules' sub-tab selected. A table lists three billing rules. The first rule, 'Bill expenses at cost', has a 'Clone' button in its 'Actions' column. The table columns are: Actions, Name, Type, Active, Position, and Description.

Actions	Name	Type	Active	Position	Description
Clone	Bill expenses at cost	Expense item	✓	1	Bill expenses Exclude non-billable receipts Exclude receipts assigned to non-billable tasks Service: Expenses Charge stage: Invoice Ready Customer PO: PO38811009
	Bill 3rd-party costs with 15% markup	Purchase item	✓	0	Bill fulfilled purchase items Mark up/down: 15% Default service: 3rd-party/purchases Charge stage: Invoice Ready Customer PO: PO38811009
	Bill time at 2009 hourly rates	Time	✓	1	Bill time using the rates from the "2010 hourly rates" rate card Charge stage: Invoice Ready Customer PO: PO38811009

To delete a billing rule:

- Go to Projects > Projects > [select a project] > Financials > Billing > Rules. A list of existing billing rules appears.
- Click on the name of the billing rule that you want to delete. The "Billing rule" form appears.
- Click **Delete** at the top of the form.



The screenshot shows the 'Billing rule' form for the rule 'Bill expenses at cost 2'. The form has a left sidebar with navigation links: General, Date range, Mark up/down, Billing rule filters, Receipt maximums, Cap, and Other. The main form area includes a 'Delete' button (highlighted with a red box) and a 'Save' button. Below the buttons, the rule is identified as an 'Expense item billing rule'. The 'Currency' is set to 'GBP'. The 'Date range' section is expanded, showing 'Start' and 'End' date pickers (MM/DD/YY) and 'Milestone' dropdown menus. A progress bar at the top right indicates 59% completion.

Note: You cannot delete a billing rule which has associated billing transactions or charges.

Running Billing Rules and Project Billing Transactions

When you run billing, a list of all billable items will be generated based on the billing rules you have set up for the project. From this list, you can select the items you want to turn into charges. These charges

can then be used in invoices. The Project Billing Transactions report will also list those items which have been billed. If you subsequently edit one of these charges so that its cost is different from the original billable item, the Project Billing Transactions report will display the original total, the charge total, and the difference between the two. If you delete a charge, the record will still remain in the project billing transactions list, and list the charge total as "0".

Note: You must create at least one billing rule for the project before you can run billing.

To run a billing rule for one project:

1. Go to Projects > Projects > [select a project] > Financials > Billing and click the **Run** link.

Actions	Name	Type	Active	Position	Description	Last run date	Charge stage	Service	Customer PO
	All	All	All			All	All	All	All
	Bill expenses at cost	Expense item	✓	1	Bill expenses Exclude non-billable receipts Exclude receipts assigned to non-billable tasks Service: Expenses Charge stage: Invoice Ready Customer PO: PO38811009	2016-07-27	Invoice Ready	Expenses	PO38811009
	Bill 3rd-party costs with 15% markup	Purchase item	✓	0	Bill fulfilled purchase items Mark up/down: 15% Default service: 3rd-party/purchases Charge stage: Invoice Ready Customer PO: PO38811009	2016-07-27	Invoice Ready	3rd-party/purchases	PO38811009
	Bill time at 2009 hourly rates	Time	✓	1	Bill time using the rates from the "2010 hourly rates" rate card Charge stage: Invoice Ready Customer PO: PO38811009	2016-07-27	Invoice Ready		PO38811009

2. If desired, enter a Start date and End date for the billing run. Click **Next**.

Note: The Start and End dates default to the values you entered when you last ran billing for the project.

3. The list of available billable items appears. If no items are billable, a "Nothing is currently billable for this project" message appears. To edit any items in the list, click the date of the billable item you want to change. Make any changes and click **Save**.
4. Select the items which you want to create charges for.
5. Click **Create project billing transactions and charges** at the bottom of the billable items list.

To run billing for multiple projects:

1. Go to Reports > Advanced and click "Pending Billings" in the "Projects" section.
2. Enter the parameters for the report in the Pending billings form.
3. Click **Run the report**. The Pending Billings report appears, and shows all projects which have billings to run.
4. Click the **Tips** button.
5. Click the **Click here** link to create the billings for the projects in the report.

Click the **Transactions** link to see the items which have been billed. The charges which have been generated can also be found at Invoices > Charges. You can run billing again by clicking the **Click here** link to run billing again. You can enter a new set of dates if necessary.

Deleting a Project Billing Transaction

To delete a project billing transaction, you must first delete the charges associated with it.

To delete project billing transactions and their associated charges:

1. Go to Invoices > Charges > [Select a type of charge].
2. Select the charges which you want to delete by selecting their check boxes in the "Run an action" column. To select the entire list of transactions, select the check box in the grey filter row.
3. Click the **Run an action** button at the top of the "Run an action" column. The Actions dialog appears.
4. Select "Delete the selected charges and associated project billing transactions" and click **OK**. The charges and their associated project billing transactions will be deleted.

Auto-Billing

OpenAir includes three options for auto-billing which allow you to simplify your billing workflow:

- **Do not auto-bill** — This is the default option. When selected, OpenAir will not auto-bill.
- **Run a trial billing, do not create project billing transactions or charges** — This option lets you test a billing run without actually creating billing items.
- **Run billing and create project billing transactions and charges** — This option runs billing and creates billing items.

You can set default auto-billing options for project billing rules on an account-wide basis, eliminating a step for project managers when creating new projects.

Financials: Billing: Rules Run Auto-run Transactions

Auto-bill

General

Email the results of the auto-bill run to:

Run auto-bill on:

Cancel Save

General

☒ Do not auto-bill
☐ Run a trial billing, do not create project billing transactions or charges
☐ Run billing and create project billing transactions and charges

Email the results of the auto-bill run to:

Employees to email [> Create](#)

☐ Suppress the email if nothing is billable

Run auto-bill on:

Day: Monday at Hour: 0 Minute: 45

Times are in U.S. Eastern Time
 Peak loads typically occur on the hour, for better performance we recommend using a minute value other than '00'.
 The default starting minute above is random.

Cancel Save

To configure auto-billing defaults:


1. Go to Administration > Application Settings > Projects Settings > Project Billing Defaults.
2. Set the options for whether to use auto-billing, trial billing, or full billing, set the auto-bill schedule, and select the employees to receive email notifications for the billing results.
3. Click **Save**.

Note: These options will apply only to new projects and will not change the auto-bill settings for any existing projects. Cloned projects will use the auto-billing settings of the original project from which the copy was made, and not the default auto-billing settings.

To run a trial auto-billing:

1. Go to Projects > Projects > [select a project] > Financials > Billing > Auto-run.
2. Select the "Run a trial billing, do not create project billing transactions or charges" option in the Auto-bill form.
3. In the "Email the results of the auto-bill run to:" section of the form, select the employees who should receive the results of the trial billing in an e-mail message by clicking on the **>Create** or **>Edit** links, selecting the employees from the "Available items" list, and clicking the **Add highlighted items >** button to move them to the "Selected items" list.
4. Select "Suppress the email if nothing is billable" to not send billing and recognition notification emails if no transactions are billable or recognizable.


5. In the "Run auto-bill on:" section of the form, select the day and the time of the week that the trial billing will run. The e-mail messages with the results will be sent as soon as the trial has been run.

 **Note:** Times are in Eastern Time (UTC -5:00 during Standard Time and UTC -4:00 during Daylight Saving Time)

6. Click **Save**.

To run auto-billing:


1. Go to Projects > Projects > [select a project] > Financials > Billing > Auto-run.
2. Select the "Run billing and create project billing transactions and charges" option in the Auto-bill form.
3. In the "Email the results of the auto-bill run to:" section of the form, select the employees who should receive the results of the billing in an e-mail message by clicking on the **>Create** or **>Edit** links, selecting the employees from the "Available items" list, and clicking the **Add highlighted items >** button to move them to the "Selected items" list.
4. Select "Suppress the email if nothing is billable" to not send billing and recognition notification emails if no transactions are billable or recognizable.
5. In the "Run auto-bill on:" section of the form, select the day and the time of the week that the billing will run. The e-mail messages with the results will be sent as soon as billing has been run.

 **Note:** Times are in Eastern Time (UTC -5:00 during Standard Time and UTC -4:00 during Daylight Saving Time)

6. Click **Save**.

Revenue Recognition

The Revenue Recognition feature lets you set up revenue recognition rules for each project individually, and you can also recognize revenue using project billing rules. Each project can have multiple revenue recognition rules, providing flexibility to meet the needs of your company's current recognition structure. You can also create manual recognition transactions within a selected project, clicking the **Create** button, and selecting **Recognition transaction**.

 **Note:** There are several switches which affect revenue recognition. See [Revenue Recognition Switches](#) for the complete list. To enable them, please contact OpenAir Support.

To create one of the following recognition rules, click **Create** and select Recognition > [Rule from list below]:

- % Complete
- As Billed
- Expenses
- Fixed amount on date or milestone
- Fixed amount on % complete
- Purchases

- Incurred vs. forecast
- Time project billing
- Balanced Incurred vs. Forecast

Revenue Recognition Rules

% Complete

This rule recognizes a fixed amount over time based on overall completion of the project. The total amount to recognize can be set in the **Amount** dropdown, and the calculation method can be set in **Calculate using**. You can select the following calculation methods:

- **% complete for the project** — calculated as the total amount set in the rule multiplied by the project's percent complete when the rule was run. For example, when recognizing \$50,000.00 for a project which is 11% complete when the recognition is run, a recognition transaction for \$5,500.00 is created.
- **Approved hours vs. planned hours for the project** — calculated as the approved hours divided by the planned hours.
- **Approved hours vs. budget hours for the project** — calculated as the approved hours divided by the budgeted hours.

You can apply rules to an entire project, or to elements of it, such as specific phases or tasks, by choosing them in the drop-down list boxes.

Calculate using

- ☒ % complete for the project
- ☐ % complete for Select...
- ☐ Approved hours vs. planned hours for the project
- ☐ Approved hours vs. planned hours for Select...
- ☐ Approved hours vs. budget hours for Select...

Service

Select...

Employee

Select...

The recognition transaction will be associated with t

Notes

Select...

1: Deployment [phase]
 2: Initiate [phase]
 6: Analyze [phase]
 12: Configure [phase]
 19: Deploy [phase]
 24: Optimize [phase]
 3: Review SOW [task]
 4: Plan deployment [task]
 5: Alignment workshop [task]
 7: Identify gaps [task]
 8: Resolve open issues [task]
 9: Define system design [task]
 10: Define data migration plan [task]
 11: Finalize deployment plan [task]
 13: Configure application [task]
 14: Conduct initial system review [task]
 15: Migrate data [task]
 16: Configure integrations [task]
 17: Define system test [task]

Use the drop-down list box to apply the rule to a specific phase or task

As Billed

This rule creates recognition transactions when a charge is created or when a charge is invoiced. It also uses charges which were already created by project billing rules and charges which were already invoiced.

Limit the time period this rule is applied to by setting a Start and End date in the Date range section of the form, or leave these fields blank to include all dates in the recognition rule.

This recognition rule calculates the recognition amounts from already-created charges from billing rules, so you can set filters on the charge types using the **Charge types to exclude** section of the form. You can choose the following:

- Exclude hourly charges
- Exclude flat rate charges
- Exclude other rate charges
- Exclude expense item charges
- Exclude project charges

Note: Expense item charges are automatically excluded if you have created an **Expenses rule**, and product charges are automatically excluded if you have created a **Purchases rule**.

You can also apply filtering rules in the **Recognition rule filters** section of the As Billed form. Click the **> Create** link and select only the charges which you want to process when the recognition rule is run.

In the Other section of the form, if you select an agreement or customer PO, transactions will be set against that agreement or customer purchase order and the drawdown will be reported. Additionally, if you need to report hours recognized, select the **Populate hours in recognition transactions** checkbox.

Expenses

This rule recognizes revenue from expenses, and offers more options than the As Billed rule. It recognizes receipts created in the Expenses module as revenue.

You can set one of several different scenarios to recognize revenue in the **Revenue to recognize** section of the Expenses rule form. The options are:

- **Mark up/down on billed expenses** — recognition on the mark up/down of the receipt when it is billed in the Invoices module.
- **All billed expenses** — recognition based on all receipts billed in the Invoices module.
- **All incurred expenses** — recognition based on all receipts which are currently assigned to the corresponding project.

You can limit the recognition rule to specific users and expense items in the **Recognition Rule Filters** section of the form. You can also restrict values based on associated tax location.

Fixed amount on date or milestone / Fixed amount on % complete

These rules recognize a fixed amount on a set date or upon completion of a milestone/percent completed. Use the drop-down list box under User to select a user to associate the rule with. Enter the remaining information and click **Save**.

Purchases

This rule recognizes revenue based on purchases created in the Purchases module. There are two scenarios to choose from:

- **Mark up/down on billed purchases** — recognition on the mark up/down of the purchase when it is billed in the Invoices module
- **All billed purchases** — recognition based on all purchases billed in the Invoices module.

Incurred vs. forecast rule

This rule recognizes revenue based on how the project is tracking against the ongoing plan by dividing incurred costs by forecast costs and then multiplying by the amount of revenue to be recognized. Incurred and forecast costs can include any combination of labor, expenses, and purchases.

This rule is similar to the percent complete recognition rule; however, while the percent complete rule only uses hours, the incurred vs. forecast rule uses other inputs.

The Incurred portion of the percentage calculation is the numerator. The following items can be included in the Incurred portion:

- **Approved hours multiplied by employee/user cost** — hours approved from timesheets multiplied by the loaded cost
- **Approved receipts** — includes receipts from approved expense reports
- **Fulfilled purchase items** — includes fulfilled purchase amounts

The Forecast portion of the percentage calculation is the denominator. The following items can be included in the Forecast portion:

- **Estimated hours multiplied by user cost** — estimated hours from the project plan multiplied by the loaded cost
- **Approved and booked hours multiplied by the employee/user cost** — approved hours from timesheets and remaining booked hours within the period multiplied by the loaded cost. When you select this option and run the rule, it will find the end date of the last approved timesheet for the user and use that as the cut-off date. The forecast amount will be:

$$(\text{Approved time before the cut-off date} \times \text{Loaded cost}) + (\text{Booked time after the cut-off date} \times \text{Loaded cost})$$
- **Total planned receipts** — an estimate of the total receipt amount for the project
- **Total planned purchase items** — the same assumption as planned receipts, taking into account purchases instead of expenses



Important: Consider the following guidelines:

- The cut-off date used for **Approved and booked hours multiplied by the employee/user cost** is based on the latest approved timesheet for that user across all projects, and is not restricted to any one project.
- The loaded cost for the employee is set in Administration > Employees > [Select an Employee] > Cost. It includes the **Current hourly cost**, which specifies the hourly cost effective today, and any **Historical hourly costs**, which may specify both past and projected hourly cost values effective within a given date range.

- By default, the **Estimated hours multiplied by user cost** forecast is calculated using the **current hourly cost** for the employee. OpenAir can be configured to calculate the **Estimated hours multiplied by user cost** forecast using the loaded cost effective on the day work is assigned, taking into account both current hourly cost and historical hourly costs.

To enable this feature, contact OpenAir Support and request the following revenue recognition switch: For incurred vs. forecast recognition rules, use hours from assign by day table for the forecast, instead of planned hours, so that dated loaded cost can be used for the forecast instead of current loaded cost.

- The **Approved and booked hours multiplied by the employee/user cost** forecast calculation always uses the loaded cost effective on the day work is assigned, taking into account both **current hourly cost** and **historical hourly costs**



Note: When selecting any of the options which use hours multiplied by cost, you can select which cost level to use from the **User cost to use** drop-down list box in the **Other** section of the form. Additionally, you can tie agreements, customer purchase orders, and services to the rule like any of the other recognition rules.

Time project billing rule

Recognizes charges as billed for selected time billing rules. This revenue recognition rule can only be created after at least one time billing rule has been created on a particular project. If you try to create the rule without a time billing rule, you will receive a “You must first create at least one Time billing rule” message.

When you’ve created one or more time billing rules for a project, you can select the billing rule or rules which will create recognition transactions when the recognition is run.

Balanced Incurred vs. Forecast Rule

This rule uses true-up transactions to balance out previous accounting periods and adjust your projections to reflect project changes. It is particularly useful when your previously recognized income is more or less than the actual revenue as of the current date.

To use this rule, first enter the amount to recognize, and select whether the rule's calculations are based on bookings or assignments. The calculations are the same for both. Selecting bookings uses bookings for forecasts, while selecting assignments uses assignments for forecasting. Actual time entries are used in both scenarios:

- approved hours are used to calculate actual revenue recognition
- worked hours are used in revenue recognition projection calculations

Note: Whenever worked hours are entered, they are prioritized over booked or assigned hours to more accurately project what is occurring in the system.

It isn't possible to combine both booked AND assigned hours in the same rule.

For the Incurred section of the calculation, you may also plan for expenses and purchases to incorporate approved receipts or fulfilled purchase items, which makes it easier to transfer from the original Incurred versus Forecast rule.

In the Forecast section, define what type of hours (booked/assigned or logged timesheet hours) are used for revenue projection calculations. Two periods are considered in the forecast:

- the past up to and including a set pivot date
- all time after the pivot date

The forecast can use either time entries or booked/assigned hours. Time entries are preferred over bookings or assignments. You can also enter total planned receipts and purchase items into the forecast.

When the rule is run, true-up transactions are used to balance out previous accounting periods when there is more or less revenue to recognize as of today. They can be generated per project or per employee.

Example of the Balanced Incurred vs. Forecast Rule

In December 2015, the following project data exists. The project will run from January 2016 to March 2016. Booked hours, projected cost, and projected revenue are the same for January 2016, February 2016, and March 2016. If there are no changes to Booked or Logged hours, the Actual revenue will match the Projected revenue for the duration of the project.

December 2015				
	Total project revenue		\$ 75,000.00	
	User cost		\$ 100.00	
	Jan-16	Feb-16	Mar-16	Total
Booked hours	160	160	160	480
Projected cost	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00	\$ 48,000.00
Projected revenue	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ 75,000.00

The following formulas are used to determine Projected cost and Projected revenue:

Projected cost = Booked hours x User cost

Projected revenue = (Projected cost / Total Projected cost) x Total project revenue

In February 2016, the Actual revenue for January 2016 has been recorded. In this example, the Actual hours were the same as the Booked hours, therefore the recorded Actual revenue was the same as the Projected revenue in January 2016.

February 2016	Total project revenue \$ 75,000.00			
	User cost \$ 100.00			
	Jan-16	Feb-16	Mar-16	Total
Booked hours	160	160	160	480
Actual hours	160			160
Projected cost	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00	\$ 48,000.00
Projected revenue	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ 75,000.00
Actual revenue	\$ 25,000.00			
Total Revenue	\$ 25,000.00			

In March 2016, the project is extended to April 2016, and 320 additional booked hours are added to April 2016. These additional booked hours increase the cost profile for the entire project. If the projected revenue was recalculated in March 2016 with this new data, the projected revenue for each month would be lower for January, February, and March in 2016.

Because the January 2016 accounting period is already closed, the Actual revenue recognized for January 2016 cannot be changed. Therefore, the Balanced IvF rule creates a true-up transaction of (\$10,000) in February 2016 to balance the Actual revenue from January 2016.

March 2016	Total project revenue \$ 75,000.00				
	User cost \$ 100.00				
	Jan-16	Feb-16	Mar-16	Apr-16	Total
Booked hours	160	160	160	320	800
Actual hours	160	160			320
Projected cost	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00	\$ 32,000.00	\$ 80,000.00
Projected revenue	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ 30,000.00	\$ 75,000.00
New Projected Revenue	\$ 15,000.00	\$ 15,000.00			
Actual revenue	\$ 25,000.00	\$ 15,000.00			
		\$ (10,000.00)			
Total Revenue	\$ 25,000.00	\$ 5,000.00			

In April 2016, income is recognized for March 2016. March 2016's booked hours were the same as its actual hours, so the Actual Revenue is the same as the Projected Revenue: \$15,000. The rule will not create a balancing transaction for this month.

April 2016	Total project revenue		\$	75,000.00	
	User cost		\$	100.00	
	Jan-16	Feb-16	Mar-16	Apr-16	Total
Booked hours	160	160	160	320	800
Actual hours	160	160	160		480
Projected cost	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00	\$ 32,000.00	\$ 80,000.00
Projected revenue	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 30,000.00	\$ 75,000.00
Actual cost	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00		
Actual revenue	\$ 25,000.00	\$ 15,000.00	\$ 15,000.00		
True Up Transaction Feb		\$ (10,000.00)			
Total Revenue	\$ 25,000.00	\$ 5,000.00	\$ 15,000.00		

In May 2016, it is determined that April 2016's Actual hours (200) were lower than the booked 320 hours. Therefore, the rule will need to create a true-up transaction in April 2016 which will take into account the true-up transaction made in February.

When the rule is run, it recalculates what the Actual revenue would have been if this new April 2016 data had been taken into account using the following multi-step calculation:

1. The rule creates a Revised Actual Revenue for each period it must account for. The formula is:

$$(\text{Actual cost for period} / \text{Total Actual Cost}) \times \text{Total project revenue} = \text{Revised Actual Revenue for period}$$
2. The rule subtracts each accounting period's original Actual revenue from the corresponding Revised Actual Revenue. The formula is:

$$\text{Revised Actual Revenue for period} - \text{original Actual revenue for period} = \text{Actual Revenue Difference for period}$$
3. The Actual Revenue Differences for each previous period (January, February, and March 2016 in this example) are summed, and subtracts any previously-recorded true-up transactions, to give the true-up transaction for April 2016. In this example, the sum of (\$7,352.94), \$2,647.06, \$2,647.06, less (\$10,000) creates a true-up transaction of \$7,941.18 for April 2016.

May 2016	Total project revenue \$ 75,000.00				
	User cost \$ 100.00				
	Jan-16	Feb-16	Mar-16	Apr-16	Total
Booked hours	160	160	160	320	800
Actual hours	160	160	160	200	680
Projected cost	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00	\$ 32,000.00	\$ 80,000.00
Projected revenue	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 30,000.00	\$ 75,000.00
Actual Cost	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00	\$ 20,000.00	\$ 68,000.00
Actual revenue	\$ 25,000.00	\$ 15,000.00	\$ 15,000.00	\$ 22,058.82	\$ 67,058.82
Revised Actual Revenue	\$ 17,647.06	\$ 17,647.06	\$ 17,647.06	\$ 22,058.82	\$ 75,000.00
Actual Revenue Difference	\$ (7,352.94)	\$ 2,647.06	\$ 2,647.06		
True Up Transaction Feb		\$ (10,000.00)			
True Up Transaction Apr				\$ 7,941.18	
Total Revenue	\$ 25,000.00	\$ 5,000.00	\$ 15,000.00	\$ 30,000.00	\$ 75,000.00

The Balanced IvF rule can be limited to specific employees, expense items, time types, or tasks using a standard OpenAir filter.

This rule can only be used with accounts using accounting periods. You can then define which accounting date to use with the rule. We recommend selecting "Use the accounting period specified below" and using the default accounting period.

The Balanced IvF rule includes a "Do not generate recognition projections for already recognized revenue" option, which functions in a similar manner to the original Incurred versus Forecast rule. If selected, the sum of all revenue recognition projections and actuals will always be equal to the revenue recognition amount defined on the rule.

With the Balanced IvF rule, you can also choose to include or exclude booked or assigned hours for users with missing time entries into recognition revenue projection calculations in periods before the pivot date.

Note: This rule also prioritizes using time entries over booked or assigned hours when generating recognition revenue projections. For example, if an employee logs time to a different project than they were originally booked to for a particular period, the calculation will use that employee's logged time rather than their booked time for the recognition calculation.

Finally, other settings allow you to add different "stamps" to generated transactions (for example, service X line, agreement, customer purchase order). You can also select which user loaded costs are used in calculations and define if the recognition rule is active or not.

Running Revenue Recognition Manually

When a recognition is run, a list of potential recognition transactions based on the set recognition rules is displayed. You can select items which you want to turn into transactions. Then, you can click **Recognition transactions** to see a list of transactions.

Note: You must have at least one recognition rule for a project before running the recognition.

To manually run Recognition (after creating at least one recognition rule)

1. Select a project and click Financials > Recognition, then click the Run recognition sub-link.
 - Enter a **Start** and **End** date for the revenue recognition run, if applicable. By default, these dates are the values entered when the last revenue recognition was run.
2. Click **Next**. The list of available revenue items appears. If no revenue is available, you will receive a "No recognition transactions are pending for this project" message.
3. If necessary, edit any items in the list. Click on the date of the revenue item you want to change. After making your changes in the dialog box, click **Save**.
4. Select the check boxes next to each item you want to include as revenue recognition transactions.
5. Click the **Create recognition transactions** link.

You can see and edit the items which have been recorded as revenue transactions by clicking the **Recognition transactions** link.

When you have created revenue transactions for a project, revenue information is displayed on the **Financial analysis** report for the project. If you want to re-run the recognition, click the **Click here** link at the bottom of the page. This will give you the option of entering a new set of dates.

Running Revenue Recognition Automatically

OpenAir has three options for automatically running revenue recognition on a timed basis. They are:

- **Do not auto-bill** — this is the default setting
- **Run recognition, do not create recognition transaction** — you can test the recognition run without actually creating revenue items
- **Run recognition and create recognition transaction** — runs recognition and creates recognition transactions

To find the auto-run options for each project, navigate to the project, click the **Recognition** link, and then click the **Auto-run** sub-link. A dialog box containing the three auto-run options will open.

You can set up automatic revenue recognition runs without creating the corresponding revenue items:

To set up a Trial Automatic Revenue Recognition Run

1. Click the **Run recognition, do not create recognition transaction** option in the **Auto-run** dialog.
2. To add users who should receive email messages of the trial run results, click the > Create or > Edit link, select users from **Available items**, and click **Add highlighted items** to move them to **Selected items**.
3. Select the day of the week and time when the trial recognition will run. Email messages with results of the run will be sent as soon as the trial has been run. All times are in U.S. Eastern Time.
4. If you don't want emails to be sent when no transactions are recognized, click **Suppress the email if there is nothing to recognize**.
5. Click **Save**.

You can set up automatic revenue recognition runs which create recognition transactions:

To set up an Automatic Revenue Recognition Run

1. Click the **Run recognition and create recognition transaction** option in the **Auto-run** dialog.

2. To add users who should receive email messages of the trial run results, click the > Create or > Edit link, select users from **Available items**, and click **Add highlighted items** to move them to **Selected items**.
3. Select the day of the week and time when the trial recognition will run. Email messages with results of the run will be sent as soon as the trial has been run. All times are in U.S. Eastern Time.
4. If you don't want emails to be sent when no transactions are recognized, click **Suppress the email if there is nothing to recognize**.
5. Click **Save**.

Revenue Reporting

The reporting values for recognized revenue can be used in reports. Commonly-used reports for reporting revenue based on the previous settings include the following:

- **Account-wide — Projects**
- **Account-wide — Company**
- **Account-wide — Clients**

To set up the captured time range, configure the **Period**, **# of periods**, and **Date** items. Then, choose corresponding fields which should be calculated in the resulting report. The following list are commonly-used Measures:

- **Projects — Actual revenue margin** — money from recognitions minus the cost of approved hours from time entries. Field type: money
- **Projects — Deferred Revenue** — money from all charges minus recognition transactions. Value will never be less than zero. Field type: money
- **Projects — Pending recognition transaction** — money from pending recognition transactions. Field type: money
- **Projects — Pending recognition transaction count** — number of pending recognition transactions. Field type: count
- **Projects — Pending recognition transaction time (Days)** — days from pending recognition transactions.
- **Projects — Pending recognition transaction time (Hours)** — hours from pending recognition transactions.
- **Projects — Projected deferred revenue [rules]** — the difference between money billed and money recognized from recognition projections. Field type: money
- **Projects — Projected revenue [rules]** — recognition projections which were generated using recognition rules. Field type: money
- **Projects — Projected revenue booking margin [rules]** — money from recognition projections which were generated using recognition rules minus the cost of the hours from the bookings. Field type: money
- **Projects — Projected revenue margin cost [corresponding cost][rules]** — revenue minus the cost. Field type: money
- **Projects — Recognition projection count** — number of recognition projections. Field type: count
- **Projects — Recognition projection time (Days)** — days from Recognition projections.
- **Projects — Recognition projection time (Hours)** — hours from Recognition projections.
- **Projects — Recognition transaction count** — number of recognition transactions. Field type: count
- **Projects — Recognition transaction time (Days)** — days from recognition transactions.
- **Projects — Recognition transaction time (Hours)** — hours from recognition transactions.

- **Projects — Recognition revenue** — money from recognitions. Field type: money
- **Projects — Recognized revenue from Expense item charges** — money from recognitions generated from Expense item charges. Field type: money
- **Projects — Work-in-Progress** — money from recognition transactions minus money from all charges. Value will never be less than zero. Field type: money

Detailed Revenue Reports

Separate reports are available for reporting revenue recognition and corresponding values. These reports are:

- **Projects — Recognition rules**
- **Projects — Recognition transactions**
- **Projects — Pending recognition transactions**
- **Projects — Recognition projections**

Projects — Recognition Rules

To view details about all currently created recognition rules, select Reports > Detail > [Projects] > Recognition rules in the old reporting system, or search for and select Projects — Recognition rules in the Next Generation Report Management interface. Set up the date filter for when the revenue recognition was created, either by selecting any predefined time range or using a custom date period.

Projects — Recognition Transactions

To view details about recognition transactions, select Reports > Detail > [Projects] > Recognition transactions in the old reporting system, or search for and select Projects — Recognition Transactions in the Next Generation Report Management interface. Set up the date filter for when the revenue recognition was created, either by selecting any predefined time range or using a custom date period. For this type of report, you can also choose conversions on a different basis in Forex conversions and User loaded cost determination. Any report value which requires a foreign exchange conversion will use that date as the exchange rate date. The date will also dictate the date used for the currency conversion of user-loaded costs for any cost reporting value.

Projects — Pending Recognition Transactions

To view details about pending recognition transactions, select Reports > Detail > [Projects] > Pending recognition transactions in the old reporting system, or search for and select Projects — Recognition Transactions in the Next Generation Report Management interface. Set up the date filter for when the revenue recognition was created, either by selecting any predefined time range or using a custom date period. For this type of report, you can also choose conversions on a different basis in Forex conversions and User loaded cost determination. Any report value which requires a foreign exchange conversion will use that date as the exchange rate date. The date will also dictate the date used for the currency conversion of user-loaded costs for any cost reporting value.

Projects — Recognition Projections

To view a complete overview of current recognition projections, navigate to Reports > Detail > [Projects] > Recognition projections in the old reporting system, or search for and select Projects — Recognition in the Next Generation Report Management interface. Set up the date filter for when the revenue recognition was created, either by selecting any predefined time range or using a custom date period. For

this type of report, you can also choose conversions on a different basis in Forex conversions and User loaded cost determination. Any report value which requires a foreign exchange conversion will use that date as the exchange rate date. The date will also dictate the date used for the currency conversion of user-loaded costs for any cost reporting value.

Specialized Revenue Reports

Two reports with pre-defined options are available in Reports > Advanced. These can be used to view pending recognitions and fixed fee projections. These reports are:

- **Pending recognition**
- **Fixed fee projections**

Pending Recognition

This report shows what recognition transactions would be generated if the projection recognition rules were run. You can also recognize revenue on individual projects or across all projects. Included items can be included based on the following:

- **Time period** — choose a date range or start date for the data
- **Filters** — select which data to include or exclude by clicking **Create** or **Edit** and selecting items from the list or using the **Find** feature.
- **Other** — you can choose to **Hide projects with no pending recognition**, select a currency, or **Save this report as ...** to save it with a particular filename.

If there are pending recognition transactions, the project name is hyperlinked. Click this link to view and create recognition transactions for the project. You can also click a link in the Tips menu to create all revenue recognition transactions across all projects with one click.

Fixed fee projections

This report shows total billings or revenue recognition anticipated under the fixed fee rules. It shows the total value of all rules: the amount used (where rules have already been run and transactions created), the percentage of the total used, and the amount remaining. This report can be customized with the following options:

- **Projections from** — select whether you want to run the report on billing or recognition rules. For recognition, both fixed fee on date or milestone and fixed fee on percent complete rules are considered.
- **Approval status** — apply filters as desired by clicking the checkboxes next to them.
- **Time periods** — Future billings or recognition can be broken out by period (specify the period, number of periods, and enter a date within the period where the report should start from).
Click **Do not move late rules to the first period** to prevent a late rule from being moved to the first period. A late rule is a rule which should have run before the first period.

You can also subtotal information by client and project.

Merging Slip and Revenue Projection Deltas Using Automatic Backup Service (ABS)

By default, when OpenAir runs slip and revenue projections, it fully generates the slip_projection and revenue_projection tables, with no indication of which records were changed against the previous run.

You can use the **Merge Daily Changes Into Slip Projection and Revenue Projection Tables** feature to generate slip and revenue projections so that changes can be recognized using the standard “created”, “updated”, and “deleted” OpenAir columns. To enable this feature, please contact OpenAir Support. Currently OpenAir detects changes only in the following fields:

- transaction_id
- acct_date
- slip_projection_id (only available in the revenue_recognition table)

If other fields are changed, the old row in the slip_projection or revenue_projection table will be flagged as “deleted” (the “deleted” field will change from null to “1”), and the new row will be added to the table.

You can also use the Create Virtual Slip and Revenue Projection Merge Tables feature to download deltas (all new, deleted, and modified transactions) for the slip_projection and revenue_projection tables using Automatic Backup Service. To enable this feature, please contact OpenAir Support.

When this feature is enabled, a **Virtual Projection Tables** option is added to the Automatic Backup Service. When this option is selected and ABS first runs, it will create the two virtual tables. ABS then copies the data directly from the slip_projection and revenue_projection tables to these virtual tables. For subsequent ABS runs, updates, additions, or deletions will be applied to these virtual tables. If the feature is disabled, the counter is reset, and when it is enabled again, ABS will recreate the two virtual tables.

You can also manually download these deltas for a selected period. Start and end dates for the deltas can be set in Administration > Global settings > Integration Import/Export > Export charge projections, Recognition projections deltas. The data file is saved in the same format as ABS MySQL export files, with SQL commands containing “update”, “delete”, and “insert SQL” statements.

Revenue Recognition Switches

The following is a list of Internal Switches which affect the Revenue Recognition feature. To enable any of these switches, please contact OpenAir Support and request the switch or switches you would like to activate.

- **Enable centralized recognition feature** — moves **Run Revenue** and the **Revenue Transaction List** to the Invoices module in their own tab. We recommend having NetSuite Professional Services help to deploy this advanced feature.
- **Allow decentralized recognition transactions in conjunction with centralized recognition feature** — maintains a project-specific list of recognition transactions in individual projects. This should only be used with the **Centralized Revenue Recognition** feature.
- **For expenses recognition rules, do not include non-billable receipts when using the All Incurred Expenses option** — ensures that non-billable receipts are excluded when an Expense rule is used with the **All incurred expenses** setting.
- **Disable editing of TimeBills associated with recognition transactions** — TimeBills associated with recognition transactions cannot be modified.
- **Allow tasks as well as phases in % complete recognition rules** — allow tasks and phases to be chosen as options in percent complete recognition rules.
- **Require a service selection in recognition rules** — requires you to make a service selection for all revenue recognition rules. If you do not select a service, the form will produce an error when submitted.
- **Use the date filter end date as the recognition date stamp** — uses the date filter end date as the recognition date stamp. The default behavior uses [Today] as the date stamp.
- **Use only invoiced charges from approved, incremented and sent/viewed invoices for "As Billed" recognition** — only uses charges that are on Approved invoices, with an applied/incremented

number that has also been marked "Sent" for "as billed" recognition. The default setting is to use ALL charges.

- **Use only invoiced charges from approved invoices for "As Billed" recognition** — ensures that only invoiced charges from Approved invoices are used in As Billed recognitions.
- **Use the invoice date for "As Billed" recognition transactions** — uses the Invoice Date for the date of "as billed" recognition transactions.
- **When TimeBill projections use booked hours, use approved and booked hours for incurred vs. forecast recognition rules** — activating this switch and using booked hours for slip projections causes incurred vs. forecast calculations to return the same values as if the "Approve and booked hours multiplied by user cost" was selected in the incurred vs. forecast rule.
- **Use the last day with approved time as the break date for Approved and booked in the Incurred vs. forecast recognition rule** — when looking at incurred vs. forecast recognition, use the last day with approved time as the date for looking back at incurred recognition and forward at forecasted recognition.
- **Enable filtering by booking type in Incurred vs. forecast recognition rules** — permits a booking type filter in leveraging bookings in the forecasted cost calculation. This may be beneficial if the forecast option is configured to use the "Approved and booked hours multiplied by user cost" option and you would like to exclude bookings which have a "Tentative" booking type from the calculation.
- **Enable support to set dates or milestones on the Incurred vs. Forecast recognition rule** — enables support to set dates or milestones on the Incurred vs. Forecast recognition rule
- **Show phases in Task filter on the Incurred vs. forecast recognition rule** — the Projects > [select Project] > Financials > [create Incurred vs. forecast rule] form shows Phase/Task instead of Task in the **Recognition rule filters** section.
- **Disable editing of exported recognition transactions** — prohibits editing of exported recognition transactions.
- **Enable editing of revenue recognition hours** — exposes the "Hours" and "Minutes" fields on revenue recognition transactions from as billed (from time) and time recognition billing rules, as well as manually created revenue recognition transactions.
- **Allow billing rules and recognition rules to be copied when a task is copied** — Allow billing and recognition rules to be copied with tasks.
- **Delete the associated billing rules and recognition rules when a task is deleted** — Delete the associated billing and recognition rules when you delete a task.
- **Add Cost centers to Charges, Project billing transactions, and Recognition transactions** — adds cost centers to charges and revenue recognition transactions.
- **Require a cost center selection in recognition rules** — recognition rules require you to select a cost center. If a cost center isn't selected, the form will display an error when submitted or saved.
- **The user can un-export recognition transactions** — lets users un-export recognition transactions.
- **The user can mark recognition transactions exported** — lets users mark recognition transactions as exported.
- **Use approved hours instead assigned hours in the approved type percent complete revenue recognition projections** — use approved hours instead of assigned ones for approved type percent complete revenue recognition projections.
- **Respect the dates filtered on 'incurred vs. forecast' rule when generating revenue recognition transactions** — Include only the approved time entries, approved expenses and fulfilled purchase items for the specified date range when generating revenue recognition transactions using 'incurred vs. forecast' recognition rules.

Note: Enable this switch, for example, if you run revenue recognitions for the previous month (e.g. November) a few days into the current month (e.g. December 6) and you only want to include approved time entries, approved expenses and fulfilled purchase items for the previous month (e.g. November 1–30) in revenue recognition transactions.

- With this switch enabled, only the approved time entries, approved expenses and fulfilled purchase items entries up to and including the specified end date (e.g. November 30) will be included in revenue recognition transactions.
 - If the switch is not enabled, revenue recognition transactions include all approved time entries, approved expenses and fulfilled purchase items up to and including the date you run the revenue recognition (e.g. December 6). This may include not only approved time entries, approved expenses and fulfilled purchase items for the previous month (e.g. November) but also for the current month up to the date you run the revenue recognition (e.g. December 6).
- **Use only bookings with the following approval statuses for % complete recognition projections** — only bookings with the selected approval statuses are used to calculate % complete revenue recognition projections.
- **Enable Recognition transaction and Recognition projection date filters in summary reports** — shows an additional Date Filters section for Recognition and Recognition Projection Values in summary reports.
- **Enable the feature to exclude specific projects from projections using custom field `exclude_from_projections`** — lets you create an “`exclude_from_projections`” custom field in a project’s properties. You can check this field to disable projections built with this particular project.
- **Show Billing Picklists on Revenue Recognition Transactions** — This feature allows you to choose which revenue recognition rule forms display a billing rule pick list. When you select a billing rule from this field, the billing rule is linked to the revenue recognition rule. This setting does not affect when billing or revenue recognition rules are run. Billing Rule IDs on revenue recognition rules can be accessed using the XML or SOAP APIs.

- **For incurred vs. forecast recognition rules, use hours from assign by day table for the forecast, instead of planned hours, so that dated loaded cost can be used for the forecast instead of current loaded cost** — By default, the **Estimated hours multiplied by user cost** forecast is calculated using the current employee hourly cost. With this optional feature enabled, the forecast is calculated using the loaded cost effective on the day work is assigned. The forecast calculation uses both the current hourly cost and the historical hourly costs set in Administration > Employees > [Select an Employee] > Cost.

Issues

To use the issues feature, you must enable it.

To enable the Issues feature:

- Navigate to Administration > Application Settings > Projects Settings > Other settings and select the switch **Enable project issues**.

The Issue functionality within OpenAir provides you with the ability to maintain and manage issues encountered on projects. There are a number of components that are available for the configuration of an issue as well as the tracking needs defined by your business requirements.

Issues can only be created from within the project for which the issue is being entered. Issues may be updated, however, directly from the Issues tab of the Projects application. Action items can be reported upon directly in the application.

Display issues by selecting Issues > and select either pending, completed, or all. Issues are also displayed and linked to a project. Select Projects > Project > Issues.

There are a number of ways to define issues and they include categories, severities, sources, stages, and statuses.

To create an Issue:

1. Go to Projects > Projects and select the specific project.
2. Select **Issue** from the **Create Button**.
3. Enter the New issue form information.
4. Click Save.

You can also quickly create new Issues using existing ones' information. While in the Issues list view, click the **Duplicate** option next to the Issue you would like to duplicate.

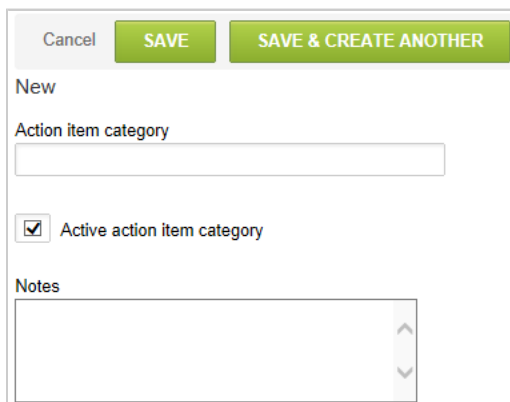
To view and update Issues:

1. Go to Projects > Projects and select the specific project.
2. Select the Issues tab.
3. Click the **Edit** or **Report** link for the issue.

Refer to the following for a description of each issue component and guidelines for creating them:

- [Issue Categories](#)
- [Severities](#)
- [Sources](#)
- [Stages](#)
- [Statuses](#)

Issue Categories



Cancel SAVE SAVE & CREATE ANOTHER

New

Action item category

☒ Active action item category

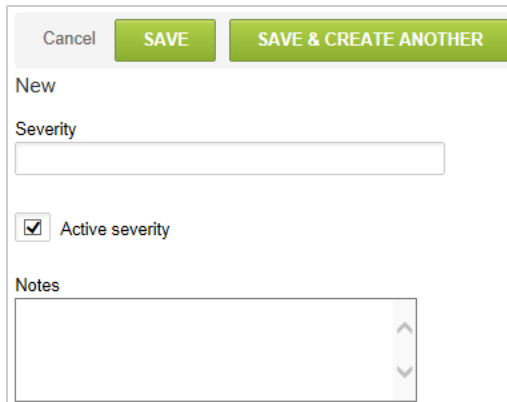
Notes

Issue categories indicate the areas within a project that are impacted by the issue or the type of issue identified. The category may be at a very high level such as Issue or Risk. They may also be at a more defined level such as Documentation, Product, Usability, and Training. You can also add notes describing the issue category. Issue categories, after they have been defined, may be inactivated and reactivated at any time.

To create Issue categories:

1. Go to Administration > Application Settings > Projects Settings > Issue categories. Select **New Issue category** from the **Create Button**.
2. Complete form information and click Save.

Severities

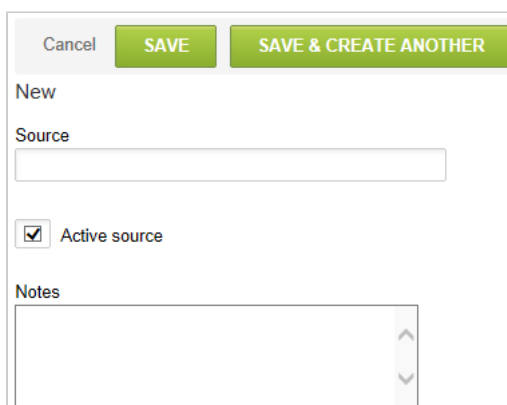


Severities designate how serious or critical the issue is in terms of impacting a deliverable, the project plan or other key elements of the project. Possible values could be Low, Medium and High or use of a numeric scale (e.g., 10 is severe impact and 1 is slight impact). You can also add notes describing the severity. Issue severities, after they have been defined, may be inactivated and reactivated at any time.

To create severities:

1. Go to Administration > Application Settings > Projects Settings > Severities.
2. Select **New Severity** from the **Create Button**.
3. Complete form information and click Save.

Sources



Sources identify the person, team, or area that submitted the issue for the project. Examples are: Project Manager, Team Member, Client Lead or Test Results. The issue source provides another filter and

reporting option for classification of the issues reported. You can also add notes describing the issue source. sources, after they have been defined, may be inactivated and reactivated at any time.

To create sources:

1. Go to Administration > Application Settings > Projects Settings > Sources.
2. Select **New Source** from the **Create Button**.
3. Complete form information and click Save.

Stages

The screenshot shows a 'New Stage' form with the following fields and options:

- Buttons: Cancel, SAVE, SAVE & CREATE ANOTHER
- Section: New
- Field: Stage (text input)
- Checkbox: ☐ Make this the default stage for new action items. Below it, text reads: 'The current default stage is Open'.
- Checkbox: ☐ Action items in this stage are considered closed.
- Section: Other (indicated by a chevron icon)
- Field: Position (dropdown menu showing 'After Resolved'). Below it, text reads: 'The position determines the order of the stages'.
- Field: Notes (text area with up/down arrows).

Stages designate where the issue is in the process. Sample stage values could include: Open, Assigned, On Hold, In Work and Resolved. You can select via check boxes whether this stage is the default assigned to new issues and whether issues are considered closed when in this stage. Typically an Open stage is selected as the default for new issues and the Resolved stage is selected as the stage for issues to be considered closed. You also designate where the stage value displays in the list of issue stages. A notes field is available for issue descriptive material.

Note: An issue stage may not be inactivated after it has been defined. It may be deleted altogether provided no issues are in the stage.

To create stages:

1. Go to Administration > Application Settings > Projects Settings > Stages.
2. Select **New Stage** from the **Create Button**.
3. Complete form information and click Save.

Statuses

Statuses provide a means to identify the overall health of the issue. Sample statuses are: Red (critical), Amber (on watch list) and Green (no known problems). You can enter as many status values as are necessary for your company's needs. Using the sample values noted above, a Red status could mean that the issue will impact project timelines. An Amber status might mean the issue should be monitored to avoid impact to the project.

You can also add notes describing the status. Statuses, when defined, may be inactivated and reactivated at any time.

To create a statuses component:

1. Go to Administration > Application Settings > Projects Settings > Statuses.
2. Select **New Status** from the **Create Button**.
3. Complete form information and click Save.

Downloading Issue Attachments in List Views and Bulk Actions

You can download issue attachments without having to open each issue to download files individually, and use bulk actions to download all attachments for multiple selected issues.

To download issue attachments from a list view:

1. Click the Download icon in the "Action" column of the Project Issues list view.

Note: If an individual issue contains multiple attachments, OpenAir will download all the attachments for that issue into one ZIP file.

Project: **ERP integration** | Client: Altima Technology

Project Center **Issues** Phases/Tasks Personnel


Open On Hold Resolved **All**

Actions	Synopsis	Issue #	Priority	End Date
	All	All		All
	Plan is on track	IS-29	50	...
	Resources are on track	IS-11	50	...

To download attachments from more than one project issue at one time:

1. Go to Projects > Issues> [select an issue list view].
2. Add the "Run an action" column to the list view.
3. In the "Run an action" column, select the issues which you want to download attachments from.
4. In the "Action" dropdown list, select "Download selected".

Note: OpenAir will download all the attachments for the selected issues into one ZIP file.



[←](#) Project: **Add-on services** | Client: United Software

[Message Board](#)
[Project Center](#)
[Action Items](#)
[Phases/Tasks ▾](#)

+

Create

Home

Opportunit...

Projects

Resources

Invoices

Timesheets

[Print](#)
[Download](#)

Action item#: IS-4

Synopsis:	Client behind payment schedule
Entered by:	Carr, Bill
Date:	2014-07-25
Client:	United Software
Project:	Add-on services
Task:	3: Review SOW
Stage:	Open
Severity:	S5
Source:	Finance
Status:	
Assigned to:	Carr, Bill
Priority:	50
Date resolution required:	2014-08-03
Date resolution expected:	2014-07-28
Date resolved:	

Action item Notes

Talk to finance

Pricing

Project pricing lets you create pricing estimates for specific projects based on different staffing, rate, and time required scenarios, and automatically view the key financial analysis for those scenarios.

The screenshot shows a web form for creating a pricing scenario. At the top, there are 'Cancel' and 'Save' buttons. The form is divided into two main sections: 'Revenue' and 'Cost'. The 'Revenue' section includes three dropdown menus: 'Standard rate card' (set to '2012 hourly rates'), 'Discount rate card' (set to '2012 hourly rates'), and 'Get the revenue hours from' (set to 'Tasks'). Below these is a checkbox labeled 'Calculate revenue to generate a margin of' followed by a text input field and a '%' symbol. A note below the checkbox states: 'If this option is checked the other revenue entries are ignored'. The 'Cost' section includes a dropdown menu 'Get the hours for billable resource costs from' (set to 'Bookings'). Below this are two text input fields, each preceded by the label 'Non-billable expense or purchase cost (money) split' and 'Billable expense or purchase cost (money) split' respectively.

The Pricing feature is displayed as a link within a project if pricing is enabled within the project stage. See [Project Stages](#). The options available are determined by the pricing scenarios that are set up within the project.

Financials: Pricing: Scenario

Use the Pricing Scenario form to set up pricing scenarios for your project.

Create a Pricing Scenario

1. Go to Projects > Projects > [select a project] > Financials > Pricing. The "Scenario" form opens.
2. In the Revenue section, select the rate cards you wish to use to determine revenue based on standard and discounted rates. The analysis will show both the gross revenue (from the standard rate card) and the difference in the discounted rate card.
3. The "Get the revenue hours from" field determines the revenue portion of the analysis. Choose "Job code estimates" for a high-level, job-code-based labor revenue estimate, "Bookings" for a more detailed estimate, or Tasks for the most granular estimate. (If you want to split revenue over time, you must select "Bookings.")
4. Select "Calculate revenue to generate a margin of" if you would like to ignore revenue entries and instead calculate your scenario's revenue by a percent margin. Enter the percent margin you want generated in the text field (do not include the % sign).
5. The "Get the hours from billable resource costs from" field determines the labor cost portion of the analysis. Choose "Job code estimates" for a high-level, job-code-based labor cost estimate, "Bookings" for a more detailed estimate, or Tasks for the most granular estimate.

6. If you have enabled multi-currency functionality, select the currency for the scenario.
7. If desired, choose a percent probability of closing from the dropdown menu. This will be used when running the "Pricing analysis" Advanced project report.
8. Check the "Staffing approved" and "Finance approved" boxes to indicate if this scenario has been approved by Finance or Staffing functions. These check boxes will only be visible to users whose roles are set up to modify finance or staffing approval for project pricing.
9. Select "Use worked hours for prior months" to use actual worked hours to calculate the scenario instead of booked or assigned hours when actual hours are available.
10. Enter any desired notes, and click "Save".

Other gross revenue, investment absorptions, other billable costs, non-billable resource costs, and non-billable expense costs can all be individually spread out over time.

Split Pricing Scenario Amounts Over Time

1. Go to Projects > Projects > [select a project] > Financials > Pricing > Scenario. The "Scenario" form opens.
2. Set up the Revenue section of the Pricing Scenario form as in [Create a Pricing Scenario](#).
3. In the Cost section of the Pricing Scenario form, click the "split" link next to either the "Billable expense or purchase cost (money)" or "Non-billable expense or purchase cost (money)" fields. The form will change to show "Date" and "Amount (money)" fields for each billable or non-billable expense or purchase cost.
4. For each section where you want to split the amounts over time, select the date and corresponding amount of money that you want to allocate for that time period. The first time period defaults to today's date. Note that for every date you choose, you must have a corresponding dollar amount or you will get an error message when you try to save the Scenario.
5. For any section whose amounts you do not wish to split over time, either delete the initial date or click the "un-split" link for that section. The form will refresh without the Date and Amount fields for that section only.
6. You can add additional Date/Amount rows to any section from the "Add rows" dropdown box.

Financials: Pricing: Job Code Estimates

Job code estimates enable you to specify the position levels or jobs required to complete the project, the number of individuals performing each job, and the average number of hours each of them will work. By combining this information with the rates and adjustments established in the Scenario section, you can run financial analyses on various estimate scenarios.

Create a Job Code Estimate

1. Go to Projects > Projects > [select a project] > Financials > Pricing > Job code estimates. The "Job code estimate" form opens.
2. Select a job code from the "Job code" dropdown list.
3. Enter the number of employees who will be deployed on the project at that job level in the "# of employees" field.
4. Enter the average number of hours each of these individuals will work in the "Hours per employee" field.

5. Repeat steps 2 through 4 for each additional job code. If you need to add more rows to the grid, click the "[Add rows]" dropdown list and select the number of rows you would like to add. You can choose from "3 more", "6 more", or "9 more" rows.
6. Click "Save".

Financials: Pricing: Analysis

You can see a financial snap shot of your scenario by clicking on the "Analysis" link. The snap shot includes key revenue and cost parameters, discounts, profits and margins. By default, the analysis applies to the entire period of the project.

The weighted net revenue line represents net revenue weighted by the closing probability entered in the pricing scenario setup.

The snap shot dropdown menu lets you save a snap shot of the current analysis. You can also view previously created snap shots. To create a snap shot, select "> Create a snap shot" from the dropdown menu and enter a name in the window which opens. You can also select whether it is based on an approved budget. To view an existing snap shot, select the appropriate snap shot from the menu.

When viewing a snap shot, you can change the name of the snap shot or delete it by selecting "Edit this snap shot" from the dropdown menu and clicking the appropriate button on the window that pops up.

Note: Note: If you are analyzing a "Bookings" Scenario, you can choose to split the analysis over time periods. To do so, click the "Analysis options" link, select a time period from the dropdown menu, and the start and end dates for the analysis. If you check the "Total by period" box, the report will show subtotals for each period, the total for the range specified and the total for the entire project.

- Click the "Analysis options" link to adjust the following settings:
 - Choose to use Total by period
 - Include hourly detail by employee
 - Define the period length and its start and end dates
 - Set the Loaded hourly cost using Primary loaded costs, Secondary loaded costs, or Tertiary loaded costs
- Click the "Print" link to open the Analysis in a more printer-friendly format.
- Click the "Print budget view" link to download PDF versions of your scenario's summary or details with fields for Client Approval.
- Click the "Download" link to download your analysis as a CSV-formatted or HTML-formatted file.

Project Billing Defaults

Set the project billing default options for new projects. These options do not change the billing settings for any existing projects.

When using project billing rules within OpenAir, you may set a global project billing defaults option for running billing rules and sending results to a defined individual. The default settings for new projects include: Do not auto-bill; Run a trial billing, do not create project billing transactions or charges; Run billing and create project billing transactions and charges. You can create a list of employees to email results of the auto-bill run to and you can schedule the billing option to run at a defined day and time. Optionally, you can suppress the email if results do not include billable items.

Note: Any project billing default options can be overridden within an individual project by using the auto-bill feature within the billing link of the project.

To access and modify the Project billing defaults:

1. Go to Administration > Applications Settings > Projects Settings > Project billing defaults.

Do not auto-bill — This option does not run the billing rules automatically. This does not impact forecasting, which is handled by charge projections, nor invoicing, which can be done using a manual billing approach. For more information on charge projections, see [Charge Projections](#).

Run a trial billing, do not create project billing transactions or charges — This option does not run the billing rules automatically but does simulate running the rules to get an estimated billing value. No billing transactions or invoice charges are generated, only the trial billing value. An email is sent for each project that has a trial billing amount. This does not impact forecasting, which is handled by charge projections, nor invoicing, which can be done using a manual billing approach. For more information on charge projections, see [Charge Projections](#).

Run billing and create project billing transactions and charges — The billing rules are run automatically and generate billing transactions and invoice charges. This does not impact forecasting since it is handled by charge projections. For more information on charge projections, see [Charge Projections](#).

Note: All times set are US Eastern Time regardless of your employee specific preferred time zone. After Project billing options are set up within OpenAir, they become the default billing options for all new projects.

Project Budget

The Project Budget feature lets you draw a detailed budget for labor, expenses, and purchases associated with your project and track expenditure at the task, phase, or project level.

The feature lets you:

- Create budgets based on cost or billing.
- Keep different versions of the same budget. Budgets are archived automatically as new budgets are approved.
- Get an overview of project expenses and profitability. View budgeted totals as well as monthly, quarterly, category-level, and task-level details.
- Submit multiple budgets for approval for the same project, compare up to five budgets side by side and approve the most realistic scenario.
- Compare your project expenditure (actuals) against planned budgets.
- Identify budget variances with customizable color coding for budget items that are on or off target, based on the percentage of planned versus actual expenditure.

To enable this feature, contact OpenAir Customer Support. OpenAir Customer Support can also enable related optional features and change related configuration settings.

- The Task on Purchase Request optional feature lets you add task-level granularity for purchase requests and items.
- An optional feature lets you add **Estimate to Complete (ETC)** and **Estimate at Completion (EAC)** columns to total columns in the budget, actuals, and compare screens. The ETC and EAC values are calculated automatically when you save changes to your project budget.

For more information, see the help topic [Estimate to Complete \(ETC\) and Estimate at Completion \(EAC\) in Project Budgets](#).

- Your account can be configured to let you compare actual project costs against different project budget scenarios:
 - Normal, Optimistic, Pessimistic, Most Likely scenarios using a three point estimate (triangular or double-triangular distribution).
 - Normal, Optimistic, Pessimistic scenarios using a simplified contingency factor. The contingency factor setting lets you define optimistic and pessimistic scenarios for each project as a percentage of the planned costs. See [Creating a Project Budget or Modifying Project Budget Properties](#).

After you enable the feature, you can:

- Enable project level approvals for project budgets. See [Approval Options](#).
- Set account-wide preferences for the Project Budget feature, including color coding for budget variances. See [Account-Wide Project Budget Preferences](#).






See the following help topics:

- [Project Budget List View](#)

- [Project Budget Page](#)
- [Creating a Project Budget or Modifying Project Budget Properties](#)
- [Approving and Unapproving a Budget](#)

Project Budget List View

The project budget list view lets you view the list of project budgets associated with the project. To view the project budget list, go to Projects > Projects > [Select a project] > Financials > Project Budget.

- Click the Edit icon  to modify the project budget properties.
- Click the Copy icon  to duplicate the project budget.
- Click the Delete icon  to delete the project budget.
- Click the Submit icon  to submit the project budget.
- Click the Pin icon  to mark the project budget as baseline. The baseline budget is used as the main reference for comparison against incurred project costs (actuals) and other budgets for the same project in reports. Only one budget with any approval status can be marked as baseline for each project. Baseline budgets are indicated with a green check mark under the Baseline project budget column in the list view.





















Note: The baseline budget functionality requires the Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets optional feature to be enabled for your account. Users must have the **Allow the user to set a project budget as a baseline** role permission to mark a budget as baseline.

- Click **Budget** to view and modify the project budget.
- Click **Actuals** to compare incurred project costs against the planned budget (for cost-based budgets), or actual values from charges and invoices against the planned budget (for billing-based budgets).

Financials: Project budget

All

Untitled Columns

Action	Action	Project budget	Version	Date	Employee	Status	Quick links	Cost total (money)	Billing total (money)	Budget level	Current cost	Current billing	Remaining cost
<input type="checkbox"/>	    	All		All	All	All				All			
<input type="checkbox"/>	    	Zibura budget	1	18-Dec-31	Collins, Marc	Open	Budget Actuals	500,000 USD	0 USD	Task	10,250 USD	0 USD	489,750 USD
<input type="checkbox"/>	    	Zibura budget	2	22-Apr-12	Collins, Marc	Open	Budget Actuals	500,000 USD	500,000 USD	Task	302,920 USD	292,670 USD	197,080 USD
<input type="checkbox"/>	    	Implementation Budget	1	22-Apr-12	Collins, Marc	Open	Budget Actuals	800,000 USD	800,000 USD	Task	0 USD	0 USD	800,000 USD

3 rows

Project Budget Page

The project budget page lets you view and edit budgeted project costs over the span of the project, view actual incurred costs, and compare multiple budgets.

To view a project budget, go to Projects > Projects > [Select a project] > Financials > Project Budget and click **Budget** or **Actuals** under Quick links.

PROJECT BUDGET

Cost budget: \$500,000 | Profitability: 0.00% | Billing budget: \$500,000

PLANNED BUDGET

Cost budget: \$293,650 | Profitability: -3.49% | Total billing: \$283,400

REMAINING

Cost: \$206,350 | Billing: \$216,600

CATEGORY OVERVIEW

Labor

Cost budget: \$283,400 | Profitability: 0.00% | Billing budget: \$283,400

Expenses

Cost budget: \$9,000 | Profitability: -100.00% | Billing budget: \$0

Purchases

Cost budget: \$1,250 | Profitability: -100.00% | Billing budget: \$0

Time Grid (Summary):

Project / Task / Category / Subcategory	ETC	EAC	Total Cost	Total Hours	Total Bill
1. Deployment	\$9,000	\$162,870	\$293,650	6,603 Qty	\$283,400
2. Initiate	\$9,000	\$55,750	\$52,050	923 Qty	\$41,800
3. Review SOW	\$9,000	\$16,550	\$12,850	42 Qty	\$2,600
4. Plan deployment	\$0	\$12,000	\$12,000	240 Qty	\$12,000

Time Grid (Detailed):

	2017	2018	2019
	Q4 17	Q1 18	Q2 18
1. Deployment	\$1,040	\$48,040	\$33,880
2. Initiate	\$1,040	\$40,760	\$0
3. Review SOW	\$1,040	\$1,560	\$0
4. Plan deployment	\$0	\$12,000	\$0

The project budget page includes the following elements:

1. **Summary grid** — The left side of the budget grid shows the work breakdown structure for your project, the project costs under Expenses, Labor and Purchases categories, totals and other summary fields. You can add entries under all three categories directly from the grid and import labor entries from task assignments or bookings.
2. **Time grid** — The right side of the budget grid shows a detailed breakdown of your budget per week, month or quarter over the span of the project.
3. **Toolbar** — Switch between a view showing the budgeted costs, a view showing actual incurred costs, or a view comparing multiple budgets (see [Budget, Actuals and Compare Views](#)). Control view options such as the time granularity, the type of values shown (monetary or time and quantity, cost-based or billing-based), along with other list tools (See [Project Budget Toolbar](#)).
4. **Information and Settings panel** — Vertical tabs include summary information related to your budget and additional settings and controls. See [Information and Settings Panel](#).

Budget, Actuals and Compare Views

The project budget page lets you switch between a view showing the budgeted costs, a view showing actual incurred costs, or a view comparing multiple budgets.

- **Budget View** — Click **Budget** in the toolbar to show budgeted costs. You can add or modify budget items directly from the summary grid, and edit values for each item in the time grid.

Budget | Actuals | Compare Hardware Implementation

Money | Hours/Quantity Show billing Weeks | Months | Quarters Discard Save

Filter

Project / Task / Category / Subcategory	Cost	Total Cost	Total Hours	Rate	Total Bill	Sep	Oct	Nov	Dec
1: Deployment		\$ 16,200.00	151.00 Qty		\$16,200.00	\$ 3,900.00	\$ 5,250.00	\$ 7,050.00	\$ 0.00
2: Initiate		\$ 16,200.00	151.00 Qty		\$16,200.00	\$ 3,900.00	\$ 5,250.00	\$ 7,050.00	\$ 0.00
3: Review SOW		\$ 16,200.00	151.00 Qty		\$16,200.00	\$ 3,900.00	\$ 5,250.00	\$ 7,050.00	\$ 0.00
Expenses		\$ 3,200.00	111.00 Qty		\$3,200.00	\$ 900.00	\$ 250.00	\$ 2,050.00	\$ 0.00
Add Quick add									
✕ Business meal	\$ 0.00	\$ 200.00	0.00 Qty	\$ 0.00	\$200.00	\$ 200.00	\$ 0.00	\$ 0.00	\$ 0.00
✕ Miscellaneous	\$ 0.00	\$ 0.00	0.00 Qty	\$ 0.00	\$0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
✕ Mileage [Date varied]	\$ 0.63	\$ 50.00	80.00 mile	\$ 0.63	\$50.00	\$ 50.00	\$ 0.00	\$ 0.00	\$ 0.00
✕ Ground transit	\$ 50.00	\$ 150.00	3.00 Qty	\$ 50.00	\$150.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 0.00
✕ Hotel	\$ 100.00	\$ 2,800.00	28.00 Qty	\$ 100.00	\$2,800.00	\$ 600.00	\$ 200.00	\$ 2,000.00	\$ 0.00
Labor		\$ 13,000.00	40.00 Hrs		\$13,000.00	\$ 3,000.00	\$ 5,000.00	\$ 5,000.00	\$ 0.00
Add Quick add Import									
✕ Project management	\$ 0.00	\$ 3,000.00	0.00 Hrs	\$ 0.00	\$3,000.00	\$ 3,000.00	\$ 0.00	\$ 0.00	\$ 0.00
✕ Integration	\$ 250.00	\$ 10,000.00	40.00 Hrs	\$ 250.00	\$10,000.00	\$ 0.00	\$ 5,000.00	\$ 5,000.00	\$ 0.00
Total		\$ 16,200.00	151.00 Qty		\$ 16,200.00	\$ 3,900.00	\$ 5,250.00	\$ 7,050.00	\$ 0.00

- Click **Add** under the expenses, labor or purchases category to add a budget item. A form appears and lets you enter information for each budget item, including the periodicity for repeat costs.

Expenses

Search: x

- Airfare
- Business meal**
- Car rental
- Copies : US\$0.10/each
- Entertainment
- Ground transit
- Hotel
- Mileage [Date varied]
- Miscellaneous
- Phone

Business meal

Cost	Qty	Profitability %	Total Cost	Total Bill
15	1	0	\$ 15.00	\$ 15.00

☐ Non Periodical
 ☒ **Daily**
☐ Weekly
 ☐ Monthly
 ☐ Quarterly

Start date:

 End Date:

Notes:

Cancel Done

- Click **Quick Add** under the expenses, labor or purchases category and select a cost item subcategory to add a cost row on the project grid. You can then add cost information directly in the grid using inline-editing.
- Click **Import** to import labor cost items from task assignments or bookings.
- Click the delete icon ✕ to delete the budget item.
- Click the edit icon ✎ to edit budget item information.
- Point to the tooltip icon ⓘ to view a tooltip with information about the imported budget item.
- Double click a cell on a budget item row in the time grid to enter the budgeted cost, quantity, or number of hours for that budget item in that week. The schedule for each task and phase is indicated on the task or phase row by cells with a blue color background (task) or gray color background (phase).
- Actuals View** — Click **Actuals** in the toolbar to compare incurred project costs against the planned budget (for cost-based budgets), or actual values from charges and invoices against the planned budget (for billing-based budgets). The summary grid and time grid include columns showing planned and actual values. Actual values are either Approved, Approved excluding taxes, Open, or All.

Budget | Actuals | Compare Implementation Budget, v.2

Money | Hours/Quantity | Show billing | Weeks | Months | Quarters

Filter

Phase / Task / Category / Subc	Total		Mar-2012		Apr-2012		May-2012		Jun-2012	
	Planned	Approved	Planned	Approved	Planned	Approved	Planned	Approved	Planned	Approved
No phase assigned	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
1: System integration	\$ 10,560.00	\$ 186,272.01	\$ 0.00	\$ 665.09	\$ 0.00	\$ 611.65	\$ 7,040.00	\$ 13,203.60	\$ 3,520.00	\$ 19,085.45
19: Test & train	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Plan	\$ 10,560.00	\$ 103,352.01	\$ 0.00	\$ 665.09	\$ 0.00	\$ 611.65	\$ 7,040.00	\$ 13,203.60	\$ 3,520.00	\$ 19,085.45
Expenses	\$ 0.00	\$ 16,352.01	\$ 0.00	\$ 665.09	\$ 0.00	\$ 611.65	\$ 0.00	\$ 603.60	\$ 0.00	\$ 405.45
Airfare	\$ 0.00	\$ 5,383.09	\$ 0.00	\$ 352.10	\$ 0.00	\$ 352.10	\$ 0.00	\$ 251.50	\$ 0.00	\$ 173.57
Business meal	\$ 0.00	\$ 1,411.33	\$ 0.00	\$ 50.30	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Car rental	\$ 0.00	\$ 818.84	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Entertainment	\$ 0.00	\$ 227.04	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Ground transit	\$ 0.00	\$ 20.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Hotel	\$ 0.00	\$ 8,136.71	\$ 0.00	\$ 251.50	\$ 0.00	\$ 259.55	\$ 0.00	\$ 352.10	\$ 0.00	\$ 231.88
Mileage	\$ 0.00	\$ 26.86	\$ 0.00	\$ 11.19	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Miscellaneous	\$ 0.00	\$ 328.14	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Labor	\$ 10,560.00	\$ 87,000.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 7,040.00	\$ 12,600.00	\$ 3,520.00	\$ 18,680.00
Consulting	\$ 10,560.00	\$ 79,200.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 7,040.00	\$ 4,800.00	\$ 3,520.00	\$ 18,680.00
Total	\$ 10,560.00	\$ 186,272.01	\$ 0.00	\$ 665.09	\$ 0.00	\$ 611.65	\$ 7,040.00	\$ 13,203.60	\$ 3,520.00	\$ 19,085.45

Last refresh: 2016-03-04 08:00:54

- Compare View — Click **Compare** in the toolbar to compare up to 5 budgets on the same page. Click the Compare vertical tab in the Information and Settings panel, then select a base budget and the budgets you want to compare. To remove a budget from the compare view select **Select ...** from the corresponding dropdown field.

Fernhill Solutions
Project Financial integration

Action items Phases/Tasks Personnel Financials Reports Assignment profile Properties | 56%

COMPARE

Base budget: Implementation Budget, v2

Budget #1: Documentation Budget, v1

Budget #2: Select...

Budget | Actuals | Compare Money | Hours/Quantity | Show billing | Weeks | Months | Quarters

Filter

Project / Task / Category / Subc	Total		May-2012		Jun-2012	
	Implementation	Documentation	Implementation	Documentation	Implementation	Documentation
No phase assigned	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
1: System integration	\$ 10,560.00	\$ 0.00	\$ 7,040.00	\$ 0.00	\$ 3,520.00	\$ 0.00
12: Configure	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
19: Test & train	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
2: Plan	\$ 10,560.00	\$ 0.00	\$ 7,040.00	\$ 0.00	\$ 3,520.00	\$ 0.00
Labor	\$ 10,560.00	\$ 0.00	\$ 7,040.00	\$ 0.00	\$ 3,520.00	\$ 0.00
Consulting	\$ 10,560.00	\$ 0.00	\$ 7,040.00	\$ 0.00	\$ 3,520.00	\$ 0.00
Purchases	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Dell precision mobile workstation : US\$3,499.99/ea	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Dell precision mobile workstation : US\$3,499.99/ea	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
HP ethernet print server : US\$279.99/each	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
HP ethernet print server : US\$279.99/each	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Total	\$ 10,560.00	\$ 0.00	\$ 7,040.00	\$ 0.00	\$ 3,520.00	\$ 0.00

Last refresh: 2016-03-04 08:00:54

Information and Settings Panel

- The **Budget overview** tab lets you view the budget totals and remaining funds.
- The **Budget info & settings** tab lets you:
 - View basic budget information, including the budget name, created and modified dates, the parent budget it was created from, and its status.
 - Control view settings.
 - Check the **Rounded values** box to show monetary values rounded to the nearest integer value.
 - Check the **Enable autosave** box to save changes to your budget automatically on a regular basis (Budget view online).
 - Check the **Don't prefix task name with task ID** box to show task names only in the project budget grid and remove the task IDs.

- Check or clear a box under the View section to show or hide the corresponding project budget grid columns. On the Actuals view you can also:
 - Select to show actual costs at the task level or cumulatively at the phase or project level.
 - Select which loaded cost to show.
 - Choose which budget scenario (normal, pessimistic, optimistic, most likely) to compare actual project costs against.
- Perform certain actions, such as importing labor item information from task assignments or bookings.
- The **Agreements** tab lists the agreements and Customer POs associated with the project. The list shows summary information for each funding document, including the document name, total amount, total planned costs, and remaining funds. Billing budget entries are deducted from agreements and customer POs in chronological order.
- The **Compare** tab lets you select a base budget and other budgets you want to compare. To remove a budget from the compare view select **Select ...** from the corresponding dropdown field. You can compare up to 5 budgets at the same time.

The image displays three panels from a software interface, each with a vertical sidebar on the left containing tabs: Budget overview, Budget info & settings, Agreements, and Compare.

Panel 1: PROJECT BUDGET

Cost budget	Profitability	Billing budget
\$500,000	0.00% (\$0)	\$500,000

PLANNED BUDGET

Total cost	Profitability	Total billing
\$302,920	-3.38% (\$-10,250)	\$292,670

REMAINING

Cost	Billing
\$197,080	\$207,330

CATEGORY OVERVIEW

Labor

Cost budget	Profitability	Billing budget
\$283,640	0.00% (\$0)	\$283,640

Expenses

Cost budget	Profitability	Billing budget
\$18,030	-49.92% (\$-9,000)	\$9,030

Purchases

Cost budget	Profitability	Billing budget
\$1,250	-100.00% (\$-1,250)	\$0

Panel 2: BASIC INFO

Budget name: Zibura budget v2

Created: 22-Apr-12

Last modified: 22-Apr-12

Parent budget: Zibura budget v1

Contingency factor: 80 % / 120 %

Status: OPEN

SETTINGS

- ☒ Rounded values
- ☐ Enable auto save
- ☐ Don't prefix task name with task ID

ACTIONS

[Import Task assignments](#)

VIEW

Hide / Show

- ☒ ETC, EAC values
- ☒ Totals
- ☒ Cost and rate per unit
- ☒ Profitability (%)

Panel 3: PROJECT FUNDING DOCUMENTS

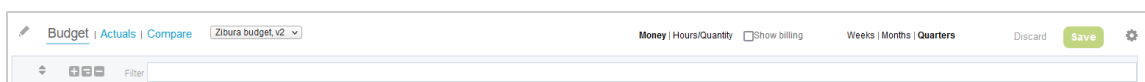
PO-2014-55 Pegasus

Amount	Planned	Remaining
\$45,750.00	\$0.00	\$45,750.00

PO-2014-65 Pegasus





Amount	Planned	Remaining
\$1,200.00	\$0.00	\$1,200.00

Project Budget Toolbar



The toolbar includes the following controls from left to right:

- Edit icon — Click the icon to edit the budget properties.
- Budget | Actuals | Compare — Choose **Budget** to show budgeted costs. Choose **Actuals** to show actual incurred costs. Choose **Compare** to show multiple budgets side by side on the same view.
- Budget dropdown — A dropdown field lets you select the budget you would like to view for the currently selected project.

- Money | Hours/Quantity — Choose **Money** to show only monetary values in the time grid. Choose **Hours/Quantity** to show time in hours and quantities instead of monetary values where relevant.
- Show billing — Check the **Show billing** box to view billing-based budget figures in the time grid. When checked, the values in the time grid. Clear **Show billing** to view the cost-based budget.
- Weeks | Months | Quarters — Choose the granularity for the time grid to show a detailed breakdown of your budget per week, month or quarter.
- Settings icon  — Click the icon to show a menu with additional options. You can download the project budget grid data as a CSV, HTML, or PDF file, enable column resize, or reset columns to their default width.
- Click the Expand All icon  or Collapse All icon  to expand or collapse all nodes in the project budget. Click the Expand Work Breakdown Structure icon  to expand all phase and task nodes but not the category and subcategory nodes.
- Filter — Enter the name of a cost category to show only matching cost items in the project budget grid.


Sorting Options

You can sort the project budget data by column using the sort icons in the summary grid and time grid column headers.

This feature supports ascending and descending sort orders and multi-level sorting up to three levels. The arrows in the column header indicate the sort order and sorting levels:

- Sorting levels are color-coded:
 - White color arrow — Primary level
 - Yellow color arrow — Secondary level
 - Green color arrow — Tertiary level
- The colored arrow indicates the sort order for each sorting level:
 - Arrow pointing up — Ascending sort order
 - Arrow pointing down — Descending sort order

Click a column header to select that column as your primary sort field. Click the same column header again to change the sort order. If you click a different column header, this column becomes your primary sorting level, the previous primary level becomes the new secondary level and the previous secondary becomes the new tertiary level.


To reset the sort order to the default one, click the sort icon  in the toolbar.

Creating a Project Budget or Modifying Project Budget Properties

You can create any number of budgets for your project using the Project Budget feature. You can also edit the properties of existing project budgets that are not submitted for approval or approved.

To create a Project Budget or modifying project budget properties

1. Go to Projects > Projects > *[Select a project]*.
2. Do one of the following:

- To create a new project budget, click the Create button, then **Project budget**.
- To modify the properties of an existing project budget, click Financials > Project budget in the project record header, and click the Edit icon  under the Action column for the budget you want to modify.

The project budget properties form appears.

3. Enter all required information on the project budget properties form. The form includes the following information:
 - **Project budget name**
 - **Date**
 - **Budget level** — Choose whether to budget at the project, phase, or task level. The budget level cannot be changed for existing budgets.
 - Check **Enable creation of project budget entries not connected to particular tasks** box, if applicable. This lets you add budget entries at the project level when **Budget level** is task, for example.
 - **Planned budget** — Define the cost (for cost budgets) or cost and profitability (%) (for billing budgets).
 - **Cost** — Total project cost (used for all budgets, whether based on cost or profitability).
 - **Profitability (%)** — The target profitability percentage (used for budgets based on billing).
 - **Billing** — Read-only value used for budgets based on billing, and calculated automatically based on:
 - The sum of all agreements and customer purchase orders attached to the project, if the **Get planned billings from Agreements and Customer POs attached to the project** box is checked.



Note: If the **Get planned billings from Agreements and Customer POs attached to the project** box is checked, changing either one of the **Cost** or **Profitability (%)** value, changes the value of the other based on the **Billing** value.

- The **Cost** and **Profitability (%)** values, otherwise.
- **Funding** — If the **Get planned billings from Agreements and Customer POs attached to the project** box is checked, the form shows the list of agreements and customer POs associated with the project including the following information: Document type, name, number, date, monetary **total**, total number of **hours**.
- **Currency** — The currency set on the project properties form.
- **Labor** — Set the labor subcategory and imported labor information settings
 - **Labor subcategory** — Budget entries for labor can be broken down either by Service or by Job code.
 - **Import labor based on** — Budget entries for labor can be imported from either task assignments or bookings.
- **Actuals vs planned color coding** — Add color coding for budget actuals in the Compare view to identify budget entries that are on or off target.
 - **Color coding** — Click **Create** to set ranges for color coding in the Compare view, based on the percentage of actual values compared to planned values.
 - **Use global color coding** — Check this box to use the color coding preferences set for your account.
 - **Actuals for color coding** — Select which actual values that will be color coded, based on item statuses (Approved, Submitted, or All).

- **Contingency factor** — Set **Optimistic (%)** and **Pessimistic (%)** scenarios for your project. Default values are 80% and 120%, respectively, and can be changed in Administration > Application Settings > Projects > Project Budget Options.

Note: The Contingency factor form section shows only if your account is configured to allow for a simplified contingency factor on project budgets. To change this configuration setting, contact OpenAir Customer Support.

- **Notes**

4. Click **Save**.

New project budget **Task-level budget for Altima Tech:Pegasus**

General
Planned budget
Labor
Actuals vs planned color coding
Contingency factor
Other

Cancel Save

General
Project budget name *
Task-level budget for Altima Tech:Pegasus
Date (YY-Month-DD) *
22-Apr-12
Budget level
☐ Project ☐ Phase ☒ Task
"Budget level" cannot be changed after save.
☐ Enable creation of project budget transactions not connected to particular tasks

Planned budget
Cost
37560
Profitability (%)
25
Billing
46950
☒ Get planned billings from Agreements and Customer POs attached to the project
Funding documents

Type	Name	Number	Date	Total	Hours
Customer PO	PO-2014-55 Pegasus	PO-2014-55	17-Jan-24	45,750 USD	
Customer PO	PO-2014-65 Pegasus	PO-2014-65	17-Jul-26	1,200 USD	

Currency
USD

Labor
Labor subcategory
☒ Service ☐ Job code
Import labor based on
☒ Task assignments ☐ Bookings

Actuals vs planned color coding
Color coding
[Create](#)
Please visit [tips menu](#) for color coding details.
Use global color coding
☒ No
Company color coding is not set
Actuals for color coding
☒ Approved ☒ Submitted ☒ All

Contingency factor
Optimistic (%)
80
Pessimistic (%)
120

Other
Notes

Cancel Save

Approving and Unapproving a Budget

You can view all budget versions for approval, automatically reject submitted budgets and archive old approved budgets in the budget interface. To view the list of budgets, go to Projects > Project budgets and select a budget status (Open, Submitted, Approved, Rejected, Archived, or All).

Different versions of the same budget are assigned a version number which is visible in the Version column of the Project budgets lists. Approved budgets automatically cause other submitted budgets to be rejected. Previously approved budgets are archived, so only one approved budget exists at any particular time.

To approve a submitted budget:

1. Go to Projects > Project budgets and select the Submitted budget list. You can also choose to show budgets which are "Waiting my approval" or "All".
2. Click the budget to approve. The budget properties form opens.
3. Click **Submit/Approve**.
4. On the Approval request form, choose **Approve**.
5. (Optional) Enter **Additional email addresses to CC** and add **notes or comments** for the approval.
6. Click **Save**.

Financials: Project budget: [Properties](#) [Budget](#) [Actuals](#) [Submit/Approve](#)

Cancel **Save**

Approval request

☒ **Approve** ☐ Reject

Additional email addresses to CC:

Notes or comments

Cancel **Save**

Approval history		
Status: Submitted		
Date/Time	Action	Notes
10/05/16 04:11 AM	Submitted for approval by Marie Porter	
10/05/16 04:11 AM	Waiting for approval by Marc Collins	

Administrators can give selected users the permission to unapprove budgets. To enable this feature for a user, go to Administration > Global Settings > Users > Employees > [Select a user ID], scroll to Projects Options, check the **Allow the employee to unapprove a project budget box**, and click **Save**.

To unapprove a budget:

1. Go to Projects > Projects > [Select a project] > Project budgets and select an approved project budget.
2. Click **Submit/Approve**.
3. In the Approval History screen, click the **Click here** link in the unapprove message to unapprove the budget.

Approval history		
Status: Approved		
Date/Time	Action	Notes
09/14/16 05:14 AM	Submitted for approval by Marc Collins	
09/14/16 05:14 AM	Approved by Marc Collins	Automatic approval: The approver is the same employee as the submitter
You can un-approve this project budget. Click here to continue.		

Account-Wide Project Budget Preferences

You can set account-wide preferences for the Project Budget feature, including color coding for budget variances.

To set account-wide preferences for the Project Budget feature, go to Administration > Application Settings > Projects > Project Budget Options.

The form lets you set the following preferences:

- Number of week, month or quarter period visible before the start date and after the end date of the project.
- Data distribution — Choose to apply the cost on the first day of the period or to distribute evenly across the whole week, month or quarter period.
- Import cost priority — Choose to use employees cost only, service or job code cost only, or both with a preference for employees cost.
- Color coding — Set color coding to identify incurred costs that are on- or off-target, based on the percentage of planned versus actual expenditure. Click **Create**, then enter **Low** and **High** percentage values and select a color for each color coding category.

Budget color-coding accurately reflects overages when using optimistic or pessimistic contingencies. After you have set color-coding ranges for a budget, when you switch between Normal, Pessimistic, or Optimistic planned values in Actuals view, the color-coding automatically takes into account the new planned values when shading actual budget values.

Note: To set a maximum percentage (essentially “infinity”) enter 999 into a High field.

- Contingency factor — Set default values for **Optimistic (%)** and **Pessimistic (%)** scenarios for project across the account.

Note: The Contingency factor form section shows only if your account is configured to allow for a simplified contingency factor on project budgets. To change this configuration setting, contact OpenAir Customer Support.

- ETC & EAC — If the Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets optional feature is enabled for your account, you can set the **Pivot date** used to calculate the ETC and EAC values:

- The Estimate to Complete (ETC) is used for forecasting the funding needed to finish the project at any point. The calculated value includes all planned budget values from the pivot date until the last project budget entry.
- The Estimate at Completion (EAC) is used for forecasting the overall cost of the project. The calculated value includes all actual budget values before the pivot date and Estimate to Complete values from the pivot date until the last project budget entry.

The image shows two overlapping windows from a software application. The primary window is titled "Project budget options" and contains several sections for configuration:

- Period settings for project budget grid:** Includes fields for "Number of periods visible on the project budget grid before starting date of the project" (set to 6) and "Number of periods visible on the project budget grid after end date of the project" (set to 0).
- Project budget data distribution:** Radio buttons for "First day of period" and "Evenly distributed across the period" (selected).
- Import cost priority:** Radio buttons for "Use only employee's cost", "Use only job code/service cost", and "Prefer employee's cost over job code/service cost" (selected).
- Company wide color coding:** A section with a "Color coding" dropdown set to "Create" and a link to "Please visit the tips menu for color coding details".
- Company wide contingency factor:** Fields for "Optimistic (%)" (set to 80) and "Pessimistic (%)" (set to 120).
- ETC & EAC:** A "Pivot date" dropdown set to "This month" and a checkbox for "Remove taxes from Approved".

 The "Save" button is highlighted in green. A red arrow points from the "Color coding" dropdown in this window to a secondary "Color Coding" configuration window on the right.

The secondary "Color Coding" window displays a table for mapping numerical ranges to colors:

Low	High	Color
0	80	Green
80	100	Yellow
100	110	Orange
110	120	Red
		Select...
		Select...
		Select...

 To the right of this table is a legend showing color swatches for Yellow, Orange, Red, Green, Blue, Blue-green, and Violet. The "Reset" button is highlighted in green.

Project Center Options

If the Project Center feature is enabled for your account, resource availability indicators in the project center view show the availability of the resource for each week as you add bookings or make changes to existing bookings for this resource. The availability indicator shows the number of hours available for booking based on the total number of hours across existing bookings for this resource that week, and the total number hours the resource is working that week (according to the employee work schedule). If the Overbooked resources warning indicators are enabled in the project center display options, the availability indicator always shows for a given resource in a given week when booked hours reach a utilization threshold.

Account administrators can configure which bookings are excluded from the available hours and booked hours calculation based on the **Booking type** and **Approval status**. They can also customize the resource availability indicator in the Project Center view, and set resource utilization ranges and color coding to suit the business requirements of your company.

To do so, go to Administration > Application Settings > Projects > Project Center Options.

Under the Resource availability calculation section of the form:

- Select the **Booking types excluded from resource availability calculation on the Project Center page** — All booking types are included by default.
- Select the **Booking approval statuses excluded from resource availability calculation on the Project Center page** — All approval statuses except "Rejected" are included by default. Rejected bookings cannot be included in the available hours calculation.

Under the Utilization color coding section of the form:

- Enter the utilization threshold for the **Overbooked warning indicator (%)**. The utilization threshold is given as a percentage of working hours in a given week. The value must be between 0 and 999.

The booking grid cell shows a warning indicator if the total number of hours the resource is booked for is greater than or equal to the specified percentage of working hours.

Note: In this context, utilization is understood as the percentage of working hours the resource is currently booked for across all projects in a given week.

- Click **> Create** or **>Edit** under **Color coding** to create or modify a custom color code for the availability indicators.

The Color coding grid appears and lets you define up to 7 utilization ranges (one per row) and their corresponding colors to suit your business requirements.

For each utilization range:

- Enter the lower limit for the utilization range under **Low**.
- Enter the upper limit for the utilization range under **High**.
- Select the **Color** to be used for the availability indicator progress bar.

Note: Non-utilized working hours (the left portion of the progress bar if the utilization is under 100%) always shows in gray color. If there are no bookings for the resource or if the utilization is not within a defined range, the entire bar shows in gray color. This gray color is not customizable.

Color Coding

Low	High	Color
0	75	Green
75	100	Orange
100	999	Red
		Select...
		Yellow
		Orange
		Red
		Green
		Blue
		Blue-green
		Violet

Cancel Reset OK

Utilization color coding

Overbooked warning indicator (%)

100

Show overbooked resource warning indicator for resource availability calculation up to X% on the Project center page

Color coding

[> Create](#)

Please visit [tips menu](#) for color coding details.

Cancel Save

Yellow

Orange

Red

Green

Blue

Blue-green

Violet

For more information about the Project Center feature, see [OpenAir User Guide](#).

Project Center options

Resource availability calculation
Utilization color coding

Cancel Save

Resource availability calculation

Booking types excluded from resource availability calculation on the Project center page

Requested
Internal
Confirmed
Tentative

Add selected > < Remove selected

Booking approval statuses excluded from resource availability calculation on the Project center page

Submitted
Approved
Open

Add selected > < Remove selected

'Rejected' bookings are excluded by default

Utilization color coding

Overbooked warning indicator (%)

100

Show overbooked resource warning indicator for resource availability calculation up to X% on the Project center page

Color coding

[> Create](#)

Please visit [tips menu](#) for color coding details.

Cancel Save

Transactional Budget

Cancel SAVE SAVE & CREATE ANOTHER

New budget

Date (MM/DD/YY) Amount (money) Currency

10/21/13 USD

User allocations

Resource	Allocation %
Select...	
Select...	
Select...	
[Add rows]	

Other

Description

Notes

The Budget option lets you track project funding over time. Many projects require change orders or extensions to the existing project budget funding. When the budget functionality has been enabled in

your OpenAir environment, you are able to identify individual funding items that make up the total project budget, such as statements of work (SOW) or purchase orders (PO).

You must contact OpenAir Support and request that the Budget feature be enabled. It is activated by an internal switch. When using the budget feature, you are not be able to enter a budget amount directly on the Edit project form. Instead, that files is read-only and contains the value and sum total of the budget line items. You enter the funding amounts using the Budget link for the appropriate project.

To create a new budget:

1. Go to Projects > Projects.
2. Select the project.
3. Select **Budget** from the **Create Button**.

There are two data elements that can be defined within the budget option: [Budget Category](#) and [Budget Activity](#). These are described as follows.

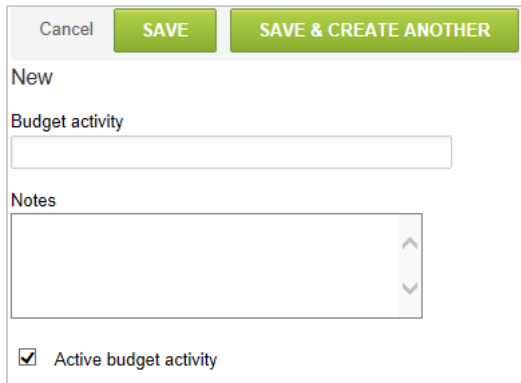
Budget Category

With Budget Category, you can specify what types of documents the funding is coming from such as a SOW, PO, or master agreement. Another common definition of categories is the type of funding such as Fees, Expenses, and Maintenance. Enter a name for the category and any notes, if needed. The Budget category field on the Budget form displays a drop-down list of categories.

To create a Budget Category:

1. Go to Administration > Applications Settings > Projects Settings > Budget categories.
2. Select **New Budget category** from the **Create Button**.
3. Enter a name for the category and any notes. The budget category drop-down list displays on the Edit the budget form.

Budget Activity



Cancel SAVE SAVE & CREATE ANOTHER

New

Budget activity

Notes

☒ Active budget activity

Budget Activities are a way to identify various activities that are involved in obtaining the project funding. Examples include Initial Estimate, Proposal Provided, and Signed Contract. Individuals responsible for the activities can be defined on the Budget form along with the activity and the % allocation of funding to the type of activity completed. Allocation usage is typically for identification of commission payouts according to the compensation policy of your company. You are able to create as many activities as necessary.

To create a Budget activity:

1. Go to Administration > Applications Settings > Projects Settings > Budget activities.
2. Select **New Budget activity** from the **Create Button**.
3. Enter a name for the activity and any notes, if needed. The budget activity drop-down list displays in the Edit the budget form.

Gantt Display (without Outline, Gantt, and Task Views enabled)

Gantt display

Show these columns on project Gantt charts

Task or Phase name	▼	in column 1
Task or Phase ID	▼	in column 2
Start date (with chart adjustment arrows)	▼	in column 3
Gantt chart	▼	in column 4
	▼	in column 5
	▼	in column 6
	▼	in column 7
	▼	in column 8
	▼	in column 9
	▼	in column 10
	▼	in column 11
	▼	in column 12
	▼	in column 13
	▼	in column 14

Cancel

SAVE

The Project Gantt View displays as a link within a project if phases/tasks are enabled within the project stage. See [Project Stages](#). The layout form lets you select the fields you want to display and the order of those fields. This is a global setting that applies to all Gantt views for projects.

To access and modify the Gantt display:

1. Go to Administration > Applications Settings > Projects Settings > Gantt display.

Project Locations

Cancel SAVE SAVE & CREATE ANOTHER

New

Project location

Notes

☒ Active project location

Country code State code

Project Locations store location information within the project entity. This information is not used as part of any other functionality in OpenAir but can be used for reporting purposes. It enables you to categorize your projects according to their location, if needed. Examples of project locations are state, city, country or any custom list of values.

To create a Project location:

1. Go to Administration > Applications Settings > Projects Settings > Project locations.
2. Select **New Project location** from the **Create Button**.
3. Enter the Project Location name and any Notes about the location.
4. Select the check box for Active project location.
5. Type a Country code and State code as applicable.
6. Click Save.

Project Stages

Project Stages classify projects based on your company's needs. For example, you may create Proposed, Active, Closed, Lost, and/or Internal stages. After you have created the stages, you can assign individual projects to the appropriate stage. For example:

- Proposed could identify projects that have not started and do not have signed contracts.
- Active would be the projects that have signed paperwork and are being worked by your resources.
- Internal usually represents projects for which you want to track time and expenses, but are not client related, such as training and documentation.

Project stages display horizontally as sub-tabs under Projects > Projects. The order in which the subtabs display is controlled by the Position dropdown list in the Project Stage form. When you click on a link, the projects in that stage display.

At the end of the list is a stage named All. When you click on the All link, it displays all projects regardless of the stage they are in.

To create a Project Stage:

1. Go to Administration > Applications Settings > Projects Settings > Project stages.
2. Select **New Project stage** from the **Create Button**.
3. Enter the Project stage name. Select whether this stage is the default stage for new projects.
4. Select the check boxes of the options that are available in this stage. These direct OpenAir to provide access to the forms related to each option.
5. Select the position of the stage and add any desired Notes.

6. You can send an email notification about changes regarding the project stages as well when projects are created with this project stage.

Note: Many features exist within the Projects application for each project. When creating a project stage, you can activate features related to your business and the particular stage of the project. For example, you may want to have Billing and Recognition options available for projects in the Active stage, but not for projects in the Internal stage. Options available for use in a project stage include:

- **Dashboard** — enables a project-specific message area and 1-click report location
- **Phases and Tasks** — exposes links related to task management
- **Worksheet** — provides ability to make updates across multiple tasks
- **Team** — displays all employees either booked or assigned to the project along with their booked or assigned dates
- **Issues** — enables issue tracking within the project
- **Budget** — provides ability to enter funding budgets including change orders or types of budget values
- **Utilization** — enables a graphical view of booked and assigned employee utilization for the project
- **Baseline** — provides for the storage of project snapshot baselines for variance reporting
- **Booking grid** — displays booking worksheet for entry of resource booking directly from the project
- **Pricing** — enables the estimation feature for displaying gross/net revenue and estimated margins
- **Billing** — provides ability to create and run billing rules for generating invoice charges and billing forecasts
- **Recognition** — provides ability to create and run recognition rules for generating revenue transactions and forecasting revenue
- **Analysis** — permits high level financial analysis of all costs and income
- **Overview** — displays a standard OpenAir status report for the project

To change the display order of project stage subtabs in the Projects list view:

1. Go to Administration > Applications Settings > Projects Settings > Project stages.

2. For each subtab, if you would like to move the position of this subtab relative to the others:
 - a. Click the project stage corresponding to the subtab,
 - b. Click the **Position** dropdown and select the relative subtab position. The relative position can be set to first project stage or after any other existing project stage.

The screenshot shows a dropdown menu for the 'Other' subtab. The menu is titled 'Position' and lists several options: 'After Active', '[First project stage]', 'After Proposed', 'After Active', 'After Administrative', 'After Templates', and 'After At Risk'. The 'After Proposed' option is currently selected and highlighted in blue. The dropdown is open, showing the list of options.

- c. Click **Save**.

To edit the Stage of a Project:

1. Go to Projects > Projects and select a project.
2. Click the Properties link.
3. Scroll down to the Project stage and select a different stage using the dropdown list.
4. Click Save.

Project Stage Email Notifications

As projects are created or moved into various project stages, you may configure the project stage form to send specified employees an automatic email notification.

To send project stage email notifications:

1. Go to Administration > Applications Settings > Projects Settings > Project stages.
2. Scroll down the form and select the desired check boxes. Send notification when projects: change to this project stage and are created with this project stage.
3. Select employees who should receive the email notification. Click Create.

Note: You cannot identify which types of projects notifications should be sent to which individuals. In other words, the identified employees for emails receive emails for all projects that meet the created or changed action.

4. Click Save.

Project Templates

Many companies also create a Templates project stage. Templates are pre-defined project structures that you can use to simplify project creation by having employees copy the template when creating a project instead of creating the project from scratch.

To use a template as the base for creating a new project:

1. Go to Projects.
2. Select **New, from another project** from the **Create Button**.
3. Under **Duplicate phases and tasks from this project**, select the appropriate template project from the dropdown list.
4. Select the check boxes of the items that indicate aspects of the project you would like to duplicate for use on the new project.
5. Complete the other requested information.
6. Click Save.

Note: By default, all projects are available for copying in step 2. To limit the number of projects that can be duplicated, create a custom checkbox field and associate it with Projects. The field name must exactly be "duplicate_from_project". We suggest a display name such as: Use as project template. After you create the custom field, you select the check box to designate that this project can be duplicated. Then, only those projects with this check box selected are available to be duplicated. See [Custom Fields Overview](#) and specifically the [Checkbox](#) custom field.

Clone a Project

In addition to using a Project Template, you can also Clone a project to copy project information from a current project to a new project.

To clone a project:

1. Go to Projects > Projects and select the project you would like to clone.
2. Click the Properties tab.
3. Select **Clone this project** from the **Tips Button**. A new project Properties form displays.
4. Type a new Project name and make any other changes you would like.
5. Click Save.

Note: To use the feature to Clone a project, an employee's role must have the ability to: View and Modify Projects. Some companies limit project cloning to System Administrators by requesting the following internal switch: Enable project cloning by role. This disables cloning for non-administrators and lets System Administrators control cloning at the role level.

Filter Sets

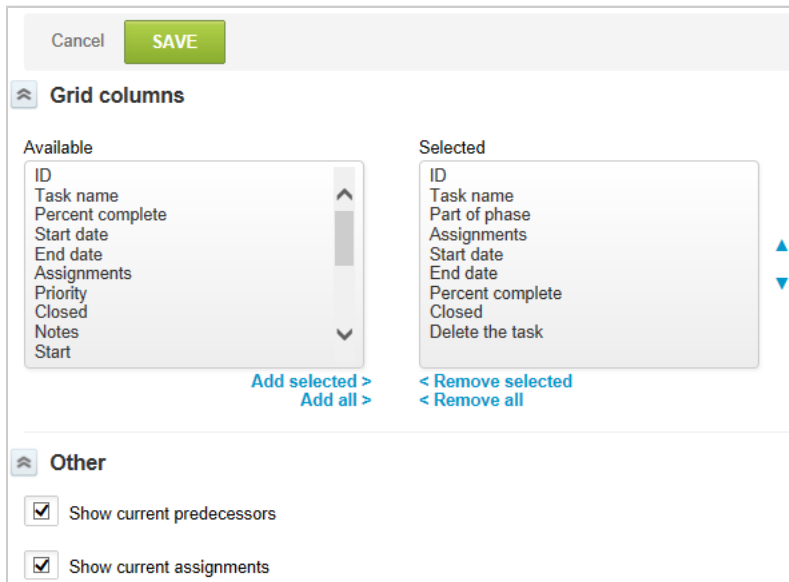
Project stages are one of the objects available for control by Filter Sets. Filter Sets define an employee's data view of the system. You can create a Filter set to limit the viewing of project information to only those employees who are assigned the specified filter set. See [Filter Sets Overview](#).

Depending on the filter set provided to employees, as well as those optionally provided to employees per application, employees may or may not be able to see all of the defined project stages. An example of when project stages might be hidden would be to remove the viewing of cancelled or internal projects to avoid employees with edit permission from accessing these projects.

To create a Filter Set for viewing projects:

1. Go to Projects > Projects and select a project.
2. Scroll down to Filter Set, and click the **Create** link. Identify the Filter set information and click OK.
3. Click Save.

Worksheet Display



Cancel **SAVE**

Grid columns

Available

- ID
- Task name
- Percent complete
- Start date
- End date
- Assignments
- Priority
- Closed
- Notes
- Start

Selected

- ID
- Task name
- Part of phase
- Assignments
- Start date
- End date
- Percent complete
- Closed
- Delete the task

Add selected > Add all > < Remove selected < Remove all

Other

☒ Show current predecessors

☒ Show current assignments

The Worksheet link displays within a project if phases/tasks are enabled in the project stage. See [Project Stages](#). The layout form lets you select the fields you want to display/modify and the order of those fields. This is a global setting that applies to all task worksheets within projects. The ability to modify specific fields within the worksheet display is controlled by edit permissions of the form or employee role.

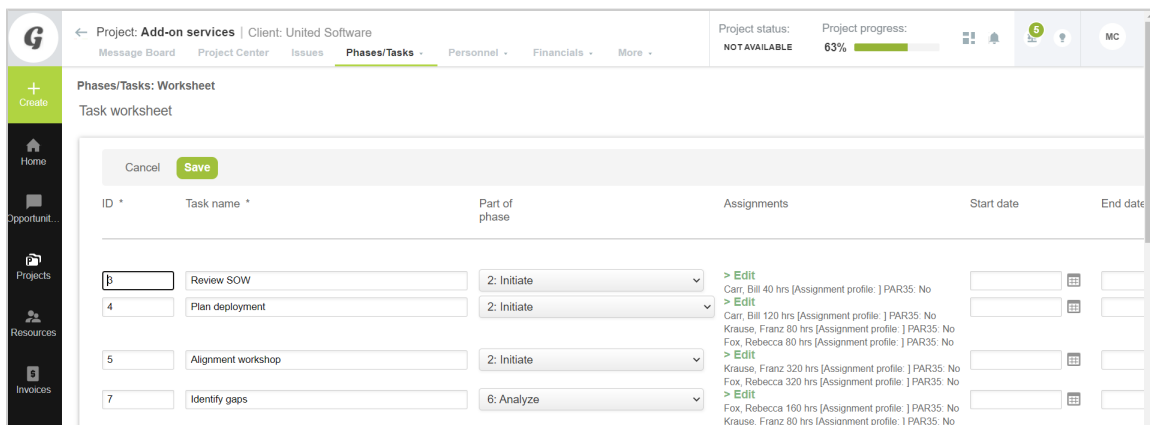
To access and modify the Worksheet Display:

1. Go to Administration > Application Settings > Projects Settings > Worksheet display.

Note: When including assignments and predecessors in the task worksheet, you may display the current value of those fields as text below the create/edit options by selecting the desired option.

Worksheet Display Pagination

The task worksheet can be separated into pages to increase performance and make large amounts of information more manageable.



Project: Add-on services | Client: United Software

Message Board Project Center Issues **Phases/Tasks** Personnel Financials More

Project status: NOT AVAILABLE Project progress: 63%

Phases/Tasks: Worksheet

Task worksheet

Cancel **Save**

ID *	Task name *	Part of phase	Assignments	Start date	End date
1	Review SOW	2: Initiate	> Edit Carr, Bill 40 hrs [Assignment profile:] PAR35: No		
4	Plan deployment	2: Initiate	> Edit Carr, Bill 120 hrs [Assignment profile:] PAR35: No Krause, Franz 80 hrs [Assignment profile:] PAR35: No Fox, Rebecca 80 hrs [Assignment profile:] PAR35: No		
5	Alignment workshop	2: Initiate	> Edit Krause, Franz 320 hrs [Assignment profile:] PAR35: No Fox, Rebecca 320 hrs [Assignment profile:] PAR35: No		
7	Identify gaps	6: Analyze	> Edit Fox, Rebecca 160 hrs [Assignment profile:] PAR35: No Krause, Franz 80 hrs [Assignment profile:] PAR35: No		

To set the number of tasks which appear in a Task Worksheet page:

1. Go to Administration > Application Settings > Projects Settings > Worksheet Display.
2. In the “Number of paginated rows to display” field, enter the number of tasks you want to show on each page. Clear the field to disable this feature.
3. Select “Enable sorting on columns ID and Task name” to allow users to sort these columns alphanumerically in ascending or descending order.
4. Click **Save**.

Task Types

Project task types are useful in task assignments, time entries, receipts, and charges. They are very important in the calculation of utilization and also help filter hour-related data in reports. When time is recorded against tasks with a defined task type, the task type is stored with the time entry record. You can display and filter the task and task assignment detail reports by project task type. You can also sub-total and filter Summary Reports and Advanced Resources reports by task type. The task type provides the ability to label individual tasks on a project. You can create as many types as you need to accommodate your company's specific time tracking requirements.

Utilization reports may use the value on the stored time entry or the current value on the task. See [Reporting Options](#). All other time based reports rely on the task type stored on the time entry record.

Some examples of typical task types include: Billable, Non-Billable, and Administration. Before you can use task types, you need to configure them in your account.



Important: Task types should be set to the correct value before time entries are stored on approved timesheets. Changes to task types throughout a project lifecycle may introduce conflicts in data reporting of what is stored on the time entry record versus what is set on the task type.

To create a Task type:

1. Go to Administration > Application Settings > Projects Settings > Task types.
2. Select **New Task type** from the **Create Button**.
3. Enter the Task type name and any notes, if desired.
4. Click Save.

Note: The value of the task type does not control whether the task is available for project time billing transactions to clients. This is managed by the Non-billable task check box located near the bottom of the Properties form. As a System Administrator, it may be helpful to run a detailed task report comparing the non-billable check box value with the task type to verify the proper alignment.

To use task types:

1. Go to Projects > Projects and select a project. Select a view under Phases/Tasks. Click on a task. On the New and Edit task forms, there is a drop-down list of Project task types.

Alerts

Cancel
SAVE

Budget alert

Alert name

Alert runs on

Rule

Rule conditions
☐ Approved hrs reach % of the budget hrs
☐ Total charges reach % of the budget

Exclude tasks:
☐ Billable
☐ Non-Billable
☒ None
☐ Invoiced charges reach % of the budget

The rule is applied to these projects:
☒ All active projects
☐ Selected projects > Create
☐ Selected project stages > Create
☐ Selected project managers > Create

Charge types to exclude

☐ Exclude hourly charges
☐ Exclude flat rate charges
☐ Exclude other rate charges
☐ Exclude expense item charges
☐ Exclude product charges

Email notification

Other

You can configure Budget Alerts in OpenAir. Frequently, a 90% of Budget Alert is configured to run every day and sends an alert when approved hours read 90% of budget hours. This alert applies to all active projects and an email is usually sent to the project owner.

Alerts allow automated email reminders to be sent to ensure business needs are met. In the Projects application, a form is provided to help you create a new budget alert.

To create a Budget alert:

1. Go to Administration > Application Settings > Projects Settings > Alerts.
2. Select **New Budget alert** from the **Create Button**.
3. Name the alert.
4. Under Alert runs on, select the day and time when the Alert should run.
5. Under Rule, define the appropriate selection rules for why an alert is sent.
6. Under Charge types to exclude, select charge types.
7. Use the Email notification section to define who receives the email, the email sender, subject and text, and additional text.
8. Add notes, as desired. These notes do not appear anywhere in the alert. They are for informational purposes, such as to remember why the alert was created.
9. Select Active alert to make this alert active.
10. Click Save.

Assignment Groups

Cancel
SAVE

New

Assignment group

⌵
Employees

Available

- Adams, Mary
- Admin, Jim
- Carr, Bill
- Carter, Tom
- Collins, Marc
- Davis, Judy
- Ellis, Ed
- Foster, Tim
- Fox, Rebecca
- Garcia, Juan

Add selected >

Add all >

Selected

< Remove selected

< Remove all

⌵
Other

Notes

☒ Active assignment group

☐ Automatically add new employees to this assignment group

An Assignment group is a list of employees that are available from all the active employees in the system. Assignment groups allow you to assign a number of employees to projects and/or project tasks quickly and share reports to multiple employees efficiently. The effect within OpenAir is the same as assigning the employees individually to projects and/or project tasks or sharing reports to individual employees.

Assignment group functionality is useful when you have tasks that need to be assigned to a large number of employees such as on internal or administrative projects. In this case, you establish an assignment group that contains all company employees. Then you assign them via the assignment group to tasks such as training, vacation, and holidays. The hours set on an assignment group on a task can either be split evenly among the group or kept the same across each employee in the assignment group. Another use is where you may have a group of resources with similar skills and can be interchangeable on a project task. To avoid having to set up each resource on the task when they begin work, the assignment group provides a simple solution.

To Create an Assignment group:

1. Go to Administration > Application Settings > Projects Settings > Assignment groups.
2. Select **New Assignment group** from the **Create Button**.
3. Name the Assignment group and select Employees from the Available list.
4. Add notes to clarify the use of the assignment group.
5. Select Active assignment group to make this assignment group active.
6. Click Save.



Note: If you have an assignment group for all employees, you can reduce administrative maintenance by sending an email to OpenAir Support and requesting that the following internal switch be enabled: Enable the feature to designate an assignment group to which newly created employees will be automatically added.

To Add an Assignment Group to a Task:

1. Navigate to Projects > Projects > [Select a project], then select **Task view** from the Outline, Gantt, or Task view menu.
2. Select the task which you would like to assign the Assignment Group to.
3. In the Task form, navigate to **Assignments**, click an **Assigned to** drop down list, and select either a specific resource or an Assignment Group to assign to the task.
4. Click **Save** to save the assignment.

Notifications

Projects related email notifications are highly configurable in OpenAir. Send an email notification when a project is created as well as when specified conditions are met. You designate who receives an email notification and compose the actual email notification message.

To enable this feature, [Creating a Support Case](#) and request the following switch be enabled: Enable administration of notifications in the following application settings: Projects.

To create Projects notifications:

1. Go to Administration > Application Settings > Projects Settings > Notifications.

Cancel **SAVE**

▼ **Send a notification ...**

When these conditions are met ... ▼

One or more conditions are required

Active project ▼ yes ▼

+ Add row

▼ **Notify**

Available

[Client owner]
[Loaded cost resource's manager's manager] ^
[Loaded cost resource's manager]
[Loaded cost resource]
[Modified by]
[Project manager]
Adams, Mary
Admin, Jim

Selected

Add selected > < Remove selected
Add all > < Remove all

External email addresses

Separate multiple addresses with a comma
For email with multiple recipients:
Send each email separately ▼

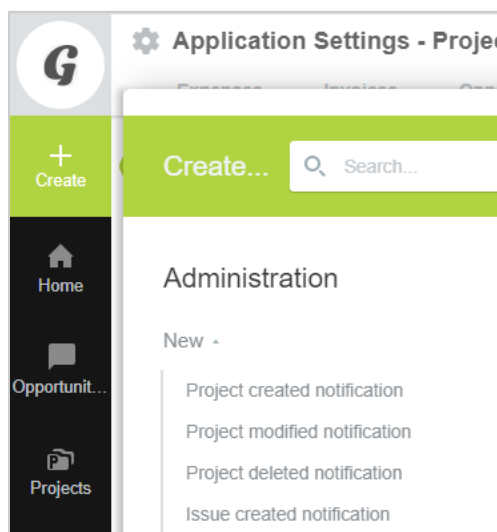
▼ **Email message**

Subject
Project created

Email body
The project "%%name%%" was created

Field
Select... ▼ **Paste**
Select the field and click "Paste" to use it in the body

2. Select the notification type from the **Create Button**.



3. In the Send a notification... section, select either when any project is created or when these conditions are met.
4. Click + to add a row and as you select options, you can further clarify the notification information such as client, project, loaded cost resource, project manager, and project stage.

5. Under Notify, specify either individual email addresses or select employees from the Available employee selection box. External email addresses can also be included.
6. Under Message, enter the desired contents of the email to be delivered. Use the Field drop-down list to specify pre-set variables as part of the email. To do this, choose the variable from the drop-down list and click on **Paste** to insert the variable into the email body.
7. Click Save.

Extended Category Feature: Service line 1 - Service line 5

Administrators now have the option of creating five new Service Lines 1 - 5. These act in a similar manner to the default “service” feature in the application and transactions in the system can be split across service lines for reporting purposes.

To use this feature, you must contact OpenAir Support and request that the following internal switch be enabled: Enable extended category feature. This lets you create the additional lines and puts service 1 - 5 as selectable fields on revenue recognition rules.

Note: You may also want to enable a combination of the following switches. Each option below is independent for each extended service.

- Enable the feature to determine the service 1 line - service line 5 to be set in transactions by searching the task and phase work breakdown structure. This means that it looks at each task and uses what is selected on that task.
- Enable the feature to specify and require the top-level phase to be used to determine the service 1 line - service line 5 to be set in transactions generated by recognition rules and billing rules. Top-level is the highest parent phase of a task whether the task is part of a phase or the phase is part of another phase. While you can override these at the bill rule and recognition rule level, you can use them to automatically specify the activity for a service at the top-level phase.

The service value set on the top level task is stamped on all transactions associated with the phase including:

- tasks
- receipts
- project billing transactions
- charges (slips)
- charge projections (slip projections)

- revenue recognition transactions
- revenue projections
- purchase orders

To create a New service 1 line (applies to service line 2 - 5 also):

1. Go to Administration > Application Settings > Projects Settings > Service 1 lines.
2. Select **New Service 1 line** from the **Create Button**.
3. Name the Service 1 line.
4. Add notes to clarify the use of the service 1 line.
5. Click Save.

Note: Repeat this procedure to create a new service 2 line, service 3 line, service 4 line, and service 5 line. Ensure you enable the correct internal switches for each service line as well.

Performance Console

The Performance Console lets you configure OpenAir to avoid running auto-billing, auto-recognition, and project recalculation for projects which are complete. With this feature, you set up criteria and OpenAir will manage whether to run auto-billing, auto-recognition, and project recalculation on each of your projects or not. With this feature, projects which have not created billing or revenue recognition transactions for several months will have their auto-billing and auto-recognition alerts run less frequently or will be deactivated by OpenAir.

Note: Administrators and users with the "Perform company maintenance functions" role permission can access the Performance Console.

The screenshot shows the 'Global Settings - Account' page with the 'Performance' tab selected. The 'Auto-rec' sub-tab is active. The page displays settings for the 'Auto-recognition Threshold'. The 'Reschedule' section shows a threshold of 120 days ago, with 0 projects today. The 'Deactivate' section shows a threshold of 400 days ago, with 0 projects today. There are 'Cancel' and 'Save' buttons at the top. A checkbox at the bottom allows applying settings to projects with no recognition transactions. A dropdown menu at the bottom shows 'All' selected, with a note: 'Projects with auto-rec enabled and last recognition transaction was created more than 400 days ago'.

To Adjust Thresholds to Stop Auto-Billing, Auto-Recognition, and Project Recalculation:

1. Navigate to Administration > Global Settings > Account > Performance.
2. Set the thresholds for when to stop auto-bill and auto-recognition in the Auto-bill and Auto-rec screens. Click **Save** on each screen to save the settings.

- You can set the **rescheduling** threshold between 7 and 180 days. The default is 120 days.
- You can set the **deactivation** threshold between 30 and 500 days. The default is 400 days.

Select the **Apply also to projects with no project billing transactions** to apply the rule to projects which have never created billing transactions. This feature may disable auto-billing for Template projects, and copy that setting to new projects created from those templates. If you enable this setting, we recommend reviewing your Template projects the day after selecting this setting. This setting does not affect projects using the `duplicate_from_project` custom field setting.

3. Set the thresholds for when to skip project recalculation. If you select more than one threshold condition, all of the selected conditions must be satisfied before OpenAir will skip recalculation on a project. Click **Save** to save your settings.
 - You can set the **skip project recalculation** threshold between 1 day and 500 days. The default is 90 days.



Important: This feature is not optional and cannot be disabled; however, the thresholds for rescheduling can be adjusted.

Other Settings

The Projects application has many configurable parts. You can enable Earned Value Management (EVM) metrics; designate that EVM metrics employee costs are from primary loaded cost, secondary loaded cost, tertiary loaded cost, or job code; and enable different project pricing scenarios.

To access the Projects Other settings:

1. Go to Administration > Application Settings > Projects Settings > Other settings.

Enable transfers: A cost transfer feature is available within OpenAir when this option is activated. Transfers are set up with a cost rate and bill rate function that permits the cost of an employee to be transferred to another cost center based on the projects worked. The use of the transfer feature is dependent on cost center setup including how cost center settings are inherited (i.e., employee, project, or service) when an employee works on a particular project. When transfers are activated, it prevents the billing of resource project time using the invoice application for the employees and projects that have transfers set up. Projects not involved in transfer setups are not impacted.

Enable task assignment at the project level: This option can only be enabled if you input planned hours at the task level rather than the assignment level. Send an email request to OpenAir Support if you are not sure of your configuration. This feature lets you assign a set of employees to tasks on the task form by selecting the following check box: Use the project assignments. Employees may still be selectively assigned if the check box is not selected on the task. This is typically determined during account configuration, but send an email request to OpenAir Support if you wish to change it.

Use a scrolling picker to assign employees to tasks: Employee selection by default is handled by a selection list with highlighting of desired employees on the left and adding them to the right for assignment. Assignments using a selection list do not have the ability to select individual employee planned hours nor other employee level value settings depending on internal switches activated in your account. Activating the scrolling picker gives you a row-by-row view of employees with each row allowing a drop-down list of employees to be assigned.

Enable task cost and billing projections: Activation of this option permits OpenAir to compute and display forecasted costs at the task level in the project outline view (for employees based on their cost rates or cost overrides on the project or task, if those features are activated) using the task assigned

hours. Financial projections for billing are performed and displayed based on the employee assigned hours. If this option is not activated, you are not able to view the forecasted employee cost or billing from the outline view of the project. This calculation is hard coded and cannot be changed. Use Reports to view a more customizable view of projections.

Enable manual override of task cost and billing projections: Activation of this option permits the computed value by OpenAir on each task to be overwritten manually. Use of this option is helpful in unit pricing or fixed fee pricing or cost (such as a subcontractor) at the task level.

Enable project rate cards to be used in billing projections: Activation of this option provides the ability to calculate projected billing forecasts based on rate card rates rather than employee hourly rates. This option requires the "Enable task cost and billing projections" feature to be switched on. To use this feature, select Rate card from the Projected Billing options for the project and the required rate card to base the calculation on. The job code is taken for the employee and can be overridden at the task assignment. If the job code is not found on the rate card then a warning is issued and the hourly rate is used in the calculation. See also the "Use zero rate for billing projections when no job code is available" feature.

Use zero rate for billing projections when no job code is available: This feature can be used when the "Enable project rate cards to be used in billing projections" feature is switched on. Activating this feature will result in a zero value being taken for employees that do not have a rate card rate defined for their job code on the rate card specified for the project.

Make the task percent complete drop-down read-only: Enable this setting to make the percent complete drop-down on tasks read-only for all users.



Important: This setting is recommended if percent complete is being auto-calculated by the system (i.e. hours remaining or "Update percent complete as approved hours divided by planned hours" are enabled). If this drop-down is editable and the system is auto-calculating, a user can change the dropdown, but the selection will revert to system calc on subsequent updated of approved/planned/estimated hours.

Require service in tasks: If you have implemented services, this option lets you make this field mandatory for all tasks when the form is created or modified. This requires you to define a complete set of services so that a valid value is always able to be selected for any type of task. Checking this option is particularly important if you have checked the timesheet option to retrieve the service from the task for timesheets if one is not entered or the option to always get the service from the task. The task level service setting may be passed to timesheet and included or overridden in billing rules and recognition rules based on service settings within the rules. Service settings are not kept historically on a task but are recorded historically on timesheet entries that pick up the service from the task level.

Use only invoiced charges for WIP calculations: WIP or Work-In-Process is an accounting computation regarding the state of revenue recognition based on revenue recognition and invoicing. This is only derived in reporting, no actual WIP transaction is generated with the application. Depending on your accounting practice and the setup of billing rules within OpenAir to drive your revenue recognition, charges may be created that are used for revenue recognition but not invoicing. An example is a fixed price project which has an hours complete revenue recognition policy. If you are generating two sets of charges for this situation, one set of charges is used for invoicing (the fixed amounts) and the other is used to drive revenue recognition (as billed). WIP in this case should only be based on invoiced charges so this option would be checked. Likewise, any deferred billing charges would also not be included in WIP if they were not put on an invoice.

Enable project-wide resource substitution: Resource substitution can be done on the task level with or without this option by selecting the resource name and selecting a substitution candidate from the list provided via the search criteria option set (see below). The team link within a project also provides a list of employees which can be substituted by selecting their name within the team link. Activating this option permits a project wide substitution of a resource if selected within the team link. The employee does not

get an option to pick which tasks should be substituted when this option is activated - all tasks have the resource substituted to which they are assigned.

Search criteria for finding a resource to substitute for another on a task assignment: The search criteria is a pattern match of the selected employee among all other employees and generics that are active in OpenAir for possible matches. The resource profile match depends on the skill database setup you've put in place. Depending on the complexity of the skill database, resource matching may become too unique and therefore limit or eliminate viable candidates due to a missing profile element. The job code value per employee is a one-to-one setting so a match is more likely due to the simplicity of data entries. If you have not set up a skill profile, then using this search criteria returns a list of all active employees/generics since an empty profile matches among all employees.

Exclude project constraints from search criteria during resource substitution search by profile: Activation of this option removes any availability of resource checks when performing a profile match against employee and generic candidates.

Require a service selection in recognition rules: Recognition rules inherit the service passed on billing transactions and charges, if you have set up services within OpenAir, unless it is overridden on the recognition rule. If your policy is to control the service settings to match your revenue recognition accounting policy (such as a specific account used to capture revenue in your accounting system), activate this option to require a setting of the service, which overrides any service setting from the billing transaction or charge. This requires you to define a complete set of services so that a valid value is always able to be selected for any type of revenue.

Task percent complete interval choices: You have the option to define how precise the % complete value is used within OpenAir. A 5% interval is a popular choice for ease of client communication.

Employees available for assignment to a project: Options that make employees available for assignment provide control over which employees are viewable for project or task assignment by your project setup resources. The booked employees or all if none booked permits an open employee selection unless an employee has been booked to the project. After an employee is booked then only booked employees are displayed. If you use assignment groups, this option is viable provided no employees are booked. After an employee is booked, the ability to use assignment groups on the project is removed. Booked employees option displays only employees booked to the project. All employees always displays all employees, including assignment groups. This can be used for generics and regular users alike.

Enable support for select resources to always be available for assignment to a project: If checked, this trumps the "Users available for assignment" setting.



Important: Requires a custom field named exactly "resource_always_assignable" to be created.

Project pricing scenarios can get hours from: The pricing feature within the project uses hours set up under scenarios to compute a project price. There are three possible ways to use hours for the scenario setup: Estimated hours, Booked hours, and Assigned hours. You may opt to allow all three scenarios during setup or identify a specific one which drives your employees to a standard for pricing. Estimated hours are entered within the pricing feature as hours per job code which drives the scenario. Booked hours are the employee bookings entered via the project booking worksheet or resource booking tab. Assigned hours are those entered on tasks with employee assignments. Any resource type (regular or generic) may be used for the pricing scenarios. Booked hours and assigned hours for pricing may use Generics to earmark the type of resource needed if the project is a proposal or for the actual resource on the project if a contract extension is being forecasted.

100% field for project pricing reports: When setting up a pricing scenario, an analysis displays opportunity revenue, gross revenue, and net revenue. This option lets you define how the %'s are treated on the analysis report by selecting a revenue type as the base for 100%. For example: If gross revenue is selected, then the % of opportunity revenue and net revenue are computed against the gross revenue amount.

Project pricing probability interval choices: You have the option to define how precise the % probability value is used within OpenAir. A 5% or 10% interval are popular choices to use for a pipeline maturity process.

Enable workspace member synchronization: When creating a project, you may also create a workspace associated with the project. The workspace may pre-exist and be copied or be initially created when the project is created. Selecting this option permits all employees involved with the project via task assignments to be included automatically as members of the workspace with read/write capability. Unchecking this option permits manual control of workspace membership by the project manager or project creator via the Workspaces application. If you do not create workspaces when creating a project, then this option has no system impact checked or unchecked.

Inactivate project when all tasks are closed: A project active check box is separate from the individual task closed check boxes. A project may have all tasks closed but still remain active for timesheet and expense report capturing provided tasks are not used on these items. Checking this option automatically inactivates (or uncheck the active checkbox) the project when all tasks are closed.

Mark closed tasks 100% complete: The % complete field may be manually set or computed automatically by OpenAir. If this option is unchecked, then closing a task by checking the closed check box keeps the % complete as it was set when the task is closed. Checking this option changes the % complete field automatically to 100% if the task is closed. Use of this feature is both dependent on your project management methodology and possibly your client billing if it is driven by a fixed fee on % complete of the project, phase, or task.

Closing a phase will close all sub-phases and sub-tasks within that phase: A time saving feature that permits a complete closure of a phase including sub phases and sub-tasks if the phase level is closed (checking the closed checkbox on the phase). If this option is not checked then the phase may be closed while leaving sub-phases and sub-tasks open.

Disable "Pull OpenAir resources" menu item in OpenAir Projects plugin: This option involves the use of the OpenAir Project Connector downloadable add-on service. When using the Project Connector to import a project, the resources identified within the Microsoft Project plan may be mapped to valid active resources within the OpenAir application. Checking this option disables the resource mapping feature, which disables the import of employee assignments to tasks when the project plan is imported.

Require a charge description on billing rules: Billing rules define how client invoicing is done and may drive revenue recognition. The charge description field is included on generated charges when the rule is executed. By default the field is left blank and may be entered optionally either within the rule which applies the entry to each generated charge or on individual charges when manually edited by an employee with the appropriate permissions. Charge descriptions may be displayed on an invoice. If you have defined an invoice format (layout) that displays the charge description, you may consider making the charge description field required to ensure information is available for invoices.

Require a charge service on billing rules: Time billing rules inherit the service passed from a timesheet, if you have set up service within OpenAir, or be blank unless it is overridden on the billing rule. If your policy is to control the service settings to match your client invoicing accounts (such as a specific account used to capture receivables in your accounting system), activate this option to require a setting of the service, which overrides any service setting from the timesheet. This requires you to define a complete set of services so that a valid value is always able to be selected for any type of billing. This forces a selection of a service on billing rules other than time billing if your business requires services on billing transactions.

Enable project issues: Issue tracking is an optional feature within the Project applications which permits employees to capture project issues, tracked due dates and close dates, assign issues to employees, and track general information such as the type of issue or state of the issue. When the feature is checked, a series of Issues configuration items are available including Issue Stages, Issue Categories, Issue Sources, and Issue Severities. See [Issues](#).

Issue prefix: By default issues have a prefix of IS- unless you choose to override the it. To reset the prefix, enter a new value in the text box next to the prefix pull down and save the form.

Show totals for numeric, hours and days task custom fields on project outline: By default, custom fields of numeric, hours, or days type do not automatically display total amounts when value on the tasks are rolled up to a project total. Checking this option permits the display of task custom fields of these types to appear at the project outline level. When this option is unchecked, the task level custom fields are not available for display in the project outline.

Require unique project names by client: Many of the menu drop-down lists display Client : Project entries, which may make it difficult to select values unless they are unique. Employees may see project uniqueness via an assignment, the booking process or having a filter set assigned, which limits projects the employee can access. However, unique project names may still exist. To ensure project names are unique for each client, check this option.

Enable task successor assignee notification custom field feature: When you enable this feature, you create a Project check box custom field that you can select to notify task assignees when predecessor tasks are marked 100% complete or closed. This can be set as a default value for all projects, and when you create a project from another project, if you choose the option to Duplicate notification settings, you can copy the value of the custom field.

Enable Earned Value Management (EVM) metrics: Earned Value Management metrics allow companies to have increased visibility into project status and profitability. Using data from planned and completed work within OpenAir, managers can readily assess the state of their projects. Schedule and cost metrics provide valuable insight into the health of your projects. The EVM metrics include: Planned Value (PV), Actual Cost (AC), Earned Value (EV) as a monetary value, Earned Value (EV) as a percent complete value, Budget Variance (BV), Cost Variance (CV), Schedule Variance (SV), Cost Performance Index (CPI), Schedule Performance Index (SPI) and Critical Ratio (CR).


Method to use when computing 'Earned Value Percent Complete' for projects and phases: Two methods exist for the accounting of earned value. The weighted by cost method permits a cost tracking model of the hours worked. This means more expensive resources increases the earned value results. The unwatched method applies hourly cost values evenly among resources, which results in a strict hours worked earned value model.

EVM metrics employee costs are from: When using Earned Value Metrics, you have a number of selections you can use to specify where employee costs are determined. These are: Primary loaded cost, Secondary loaded cost, Tertiary loaded cost, and Job code. OpenAir provides you with the ability to assign three levels of costs by employee. In addition, costs can be determined by the Job code. See [Job Codes](#) and [Cost](#) under Employees.

Require a cost center selection in recognition rules: Enable this setting to require a cost center selection in recognition rules. Forms will error on submission/save if a cost center has not been selected.

Require a charge cost center on billing rules: Enable this setting to require a cost center selection in billing rules. Forms will error on submission/save if a cost center has not been selected.

Gantt chart reordering sorts task IDs: Project plans may be very complex and long. There may be a need for project managers to adjust tasks by moving them up or down in the timeline of a plan. The Gantt view provides visibility into the progress of a project, as well as the ability to easily re-order tasks and phases leveraging up/down arrows. When you enable this feature, OpenAir sorts the Gantt view by automatically re-ordering tasks in the Outline view based on the revised order in the Gantt view.

 **Note:** There is an option located in the hints section of the Gantt view: Click here to re-order task IDs by current chart order. This option accounts for existing projects that have tasks that should be sorted based on the Gantt order.

Default tab for projects: Select the default tab to show when users go to Projects > Projects > *[Select a project]* unless a different default tab is set at the user level. If the user does not have access to the default tab, the first tab on the left is shown instead. You can select a specific tab or the metavalue *[Company default]* configured for your OpenAir account. To change the Company default tab, contact OpenAir Customer Support.

Note: Users can set their default tab preference in Personal Settings.

Enable prevent deletion of employee assignment with logged hours: When this option is enabled a warning is displayed to prevent the deletion or substitution of a user from a project task when the user has already logged hours.

Frequently Asked Questions

How does the Split Task work in Projects?

The Split Task functionality lets you include breaks part way through a project task. You can split the task into periods when work will be done (hours are assigned to resources) and break periods when no work will be done (no hours are assigned to resources). The task duration or the percentage of assigned resources time is recalculated automatically in function of the break periods and the planned hours for the task.

The Split Task functionality is available on the task entity form whenever you create or modify a task.

To split a task

1. Go to Projects > Tasks > [Select a task].
2. Click **Create** next to “Split the task” under the Other section of the task entity form.

The Split the task popup appears.

The screenshot shows a 'Split the task' modal window. On the left is a sidebar with a 'Blackout periods' button. The main content area is titled 'Blackout periods' and includes a sub-header: 'To split a task enter the start and end dates of the blackout period(s). No hours will be assigned to the task during a blackout period.' Below this is a table with three columns: 'Start', 'End', and 'Reason'. Each column has three input fields. Under the table is a dropdown menu labeled '[Add rows]'. At the bottom of the modal are 'Cancel' and 'OK' buttons.

3. Each row on the form corresponds to a break period. For each break period (blackout period):
 - a. Enter a **Start** and **End** time.
 - b. (Optional) Enter a **Reason** for the break.

Note: The Split the task form shows three rows by default. To add additional rows, click the **Add rows** dropdown field and select the number of rows to add.

4. Click **OK** to close the Split the task popup and return to the task entity form.
5. Click **Save**.

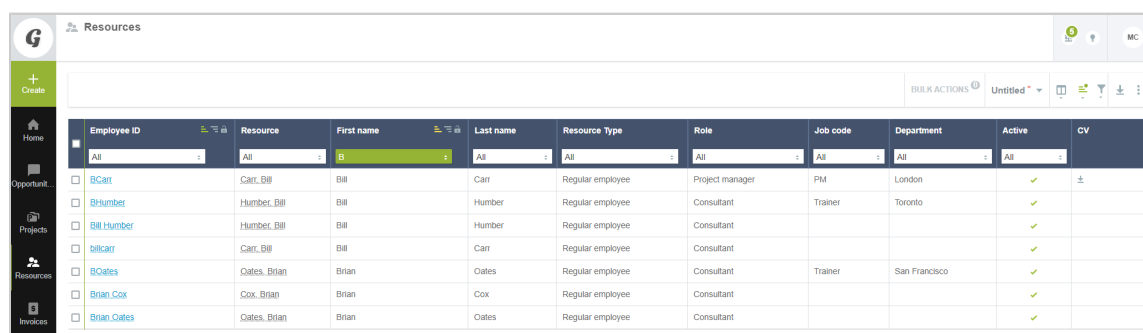
Resources

Overview

The Resources application gives you the ability to set up an entire skills database called the Resource Profile, complete with attributes per entry. The elements included are Skills, Education, Locations, Job Roles, and Industry. You may expand the Resource Profile options for your company to include up to an additional 35 custom elements that you define based on your personnel requirements.

The default application terminology for the allocation of resources to projects is booking. The Resources application helps you collect and assign the resources your company has available for booking to specific projects, and even to tasks within those projects. The intention of the resource bookings is to properly assess a forecast of your company's resource needs. The Resources application lets you:

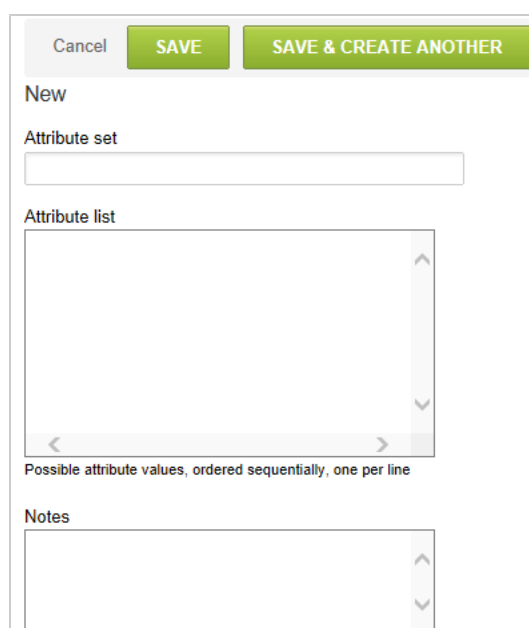
- List all resources for a particular time period and see what percentage of time they are booked.
- Display a worksheet for resources and a booking worksheet for a particular project as well as a chart that graphically shows metrics such as availability, booked time, time off, and holidays.



The screenshot shows the 'Resources' application interface. At the top, there's a header with a logo and the title 'Resources'. Below the header is a sidebar with navigation icons for Home, Opportunities, Projects, Resources, and Invoices. The main area displays a table of resource profiles. The table has columns for Employee ID, Resource, First name, Last name, Resource Type, Role, Job code, Department, Active, and CV. The table is filtered with 'All' for most columns and 'B' for First name. The table lists several resources, including Bill Carter, Bill Humber, Bill Humber, Bill Carter, Brian Oates, Brian Cox, and Brian Oates.

Employee ID	Resource	First name	Last name	Resource Type	Role	Job code	Department	Active	CV
<input type="checkbox"/> BCarr	Carr, Bill	Bill	Carr	Regular employee	Project manager	PM	London	✓	±
<input type="checkbox"/> BHumber	Humber, Bill	Bill	Humber	Regular employee	Consultant	Trainer	Toronto	✓	
<input type="checkbox"/> BHumber	Humber, Bill	Bill	Humber	Regular employee	Consultant			✓	
<input type="checkbox"/> BCarr	Carr, Bill	Bill	Carr	Regular employee	Consultant			✓	
<input type="checkbox"/> BOates	Oates, Brian	Brian	Oates	Regular employee	Consultant	Trainer	San Francisco	✓	
<input type="checkbox"/> BCox	Cox, Brian	Brian	Cox	Regular employee	Consultant			✓	
<input type="checkbox"/> BOates	Oates, Brian	Brian	Oates	Regular employee	Consultant			✓	

Attribute Sets



The screenshot shows the 'New Attribute Set' form. At the top, there are three buttons: 'Cancel', 'SAVE', and 'SAVE & CREATE ANOTHER'. Below the buttons, the form has a section titled 'New' with a sub-section 'Attribute set' containing a text input field. Below that is a section titled 'Attribute list' containing a large text area for listing possible attribute values, ordered sequentially, one per line. At the bottom, there is a section titled 'Notes' containing a text area.

Attribute sets allow you to designate a measurement of resources according to their skill set, education, or other custom characteristic defined in OpenAir.

To create an Attribute set:

1. Go to Administration > Application Settings > Resources Settings > Attribute sets.
2. Select **New Attribute set** from the **Create Button**.
3. Enter the Attribute set name and then list the values your company uses in the Attribute list. Defined Attribute sets are then available to associate with one or more tracking elements of the skill database. Attribute sets are only used on skill database tracking elements.
4. Add Notes, if desired.
5. Click Save.

Tech Skills

The screenshot shows a web form titled 'New'. It contains two input fields: 'Tech skill' and 'Description'. Below these fields is a checkbox labeled 'Active Tech skill' which is checked. At the bottom of the form are three buttons: 'Cancel', 'SAVE', and 'SAVE & CREATE ANOTHER TECH SKILL'.

Tech skills document the talents a resource has that are required by your organization. It is one of the standard Resource Profile elements provided by OpenAir. The tech skills link only displays in Resources Settings if you have activated this as a Resource profile option. See [Resource Profile](#).

You can define tech skills at a very broad level, using terms such as Database or Functional, or you can use specific skills such as SQL Server database or Oracle EBS 11i. One or more skills may be assigned to an employee resource depending on the Resource Profile configuration. You use tech skills when you search for appropriate and available employees to assign to a project. Skills also provide reporting capability in the system.

To create Tech skills:

1. Go to Administration > Application Settings > Resources Settings > Tech skills.
2. Select **New Tech skill** from the **Create Button**.
3. Type the Name of the Tech skill.
4. Add Description, if desired.
5. Select the check box for Active Tech skill.
6. Click Save.

Note: Tech skill profiles may be disabled for your account. If you would like Tech skills to be available in, or removed from Administration > Application Settings > Resources Settings > Industries, contact OpenAir support.

Education

New

Education Description

☒ Active Education

Cancel SAVE SAVE & CREATE ANOTHER EDUCATION

Education represents the level of education an employee resource has attained. It is one of the standard Resource Profile elements provided by OpenAir. The Education link only displays if you have activated this as a Resource profile option. See [Resource Profile](#).

You want to define Education entries in such a way that they can be tracked by your HR department or needs of your clients. Education entries provide an additional search and reporting capability in the system.

To create an Education record:

1. Go to Administration > Application Settings > Resources Settings > Education.
2. Select **New Education** from the **Create Button**.
3. Type the Name of the Education record.
4. Add Description, if desired.
5. Select "Active Education". When "Active Education" is selected, the education will appear as a selectable option for users.
6. Click Save.

Note: Education profiles may be disabled for your account. If you would like Education to be available in, or removed from Administration > Application Settings > Resources Settings > Industries, contact OpenAir support.

Locations

New

Location Description

☒ Active Location

Cancel SAVE SAVE & CREATE ANOTHER LOCATION

Locations specify where an employee resource lives or what office they are assigned to. It is one of the standard Resource Profile elements provided by OpenAir. The Locations link only displays if you have activated this as a Resource profile option. See [Resource Profile](#).

Many Clients require resources that are located near their project site to reduce expenses. Define the locations as is appropriate for your company and your resources. Locations can provide an additional search and reporting capability in the system.

To create Locations:

1. Go to Administration > Application Settings > Resources Settings > Locations.
2. Select **New Location** from the **Create Button**.
3. Type the Name of the Location.
4. Add Description, if desired.
5. Select the check box for Location.
6. Click Save.

Note: Location profiles may be disabled for your account. If you would like Locations to be available in, or removed from Administration > Application Settings > Resources Settings > Industries, contact OpenAir support.

Job Roles

The screenshot shows a web form titled 'New'. It contains two text input fields: 'Job role' and 'Description'. Below the 'Job role' field is a checkbox labeled 'Active Job role' which is checked. At the bottom of the form are three buttons: 'Cancel', 'SAVE', and 'SAVE & CREATE ANOTHER JOB ROLE'.

Job roles provides an ability to track past job experience by role. It is one of the standard Resource Profile elements provided by OpenAir. The Job roles link only displays if you have activated this as a Resource profile option. See [Resource Profile](#).

The Job role can be a job title or can define job duties or responsibilities. Job role definitions are not related to [Job Codes](#) or roles as defined in the [Roles Overview](#).

To create Job roles:

1. Go to Administration > Application Settings > Resources Settings > Job roles.
2. Select **New Job role** from the **Create Button**.
3. Type the Name of the Job role.
4. Add Description, if desired.

5. Select the check box for Active Job role.
6. Click Save.

Note: Job role profiles may be disabled for your account. If you would like Job roles to be available in, or removed from Administration > Application Settings > Resources Settings > Industries, contact OpenAir support.

Industries

The screenshot shows a 'New' form for creating an industry. It contains two text input fields labeled 'Industry' and 'Description'. Below the 'Industry' field is a checkbox labeled 'Active Industry' which is checked. At the bottom of the form are three buttons: 'Cancel', 'SAVE', and 'SAVE & CREATE ANOTHER INDUSTRY'.

Industries can provide you with a snapshot of which resources are suitable for a particular project. It is one of the standard Resource Profile elements provided by OpenAir. The Industries link only displays if you have activated this as a Resource profile option. See [Resource Profile](#).

An Industry may involve a direct relationship such as working for a firm within the specified industry, or it may be defined indirectly such as a consultant supporting various industries. Some clients may require a certain level of industry knowledge to have employees engaged on their projects. Industries provide an additional search and reporting capability in the system.

To create Industries:

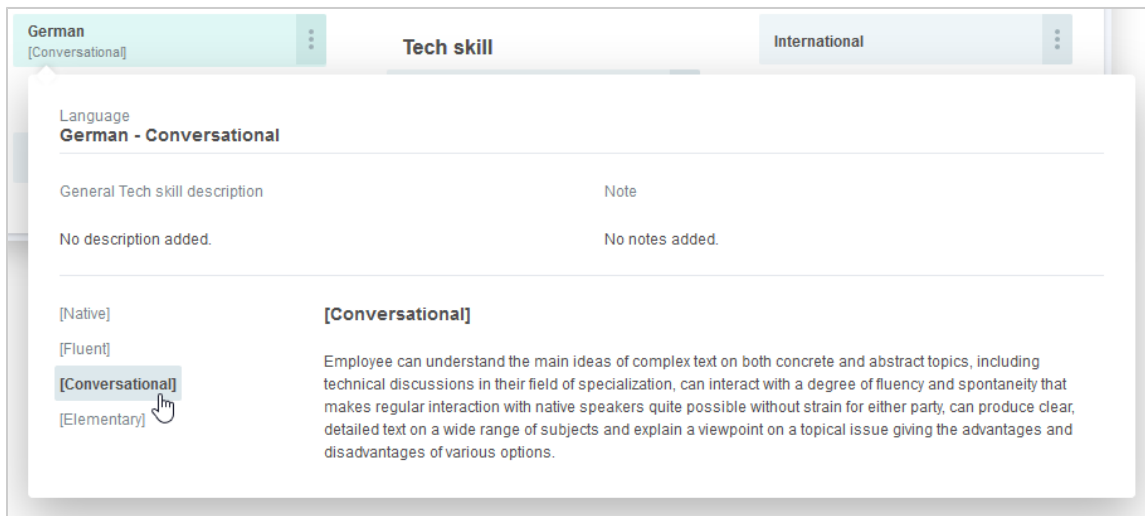
1. Go to Administration > Application Settings > Resources Settings > Industries.
2. Select **New Industry** from the **Create Button**.
3. Type the Name of the Industry.
4. Add Description, if desired.
5. Select the check box for Active Industry.
6. Click Save.

Note: Industry profiles may be disabled for your account. If you would like Industries to be available in, or removed from Administration > Application Settings > Resources Settings > Industries, contact OpenAir support.

Customizable Skill Level Descriptions

Add descriptions to skill levels to help your resource managers assign the right competency level to each resource.

You can point to a skill on the consolidated resource profile, to view a skill description panel including a general description and a description of the competency level selected for that skill. To view the description for another competency level, point to that competency level on the skill description panel.



To add descriptions for competency levels:

1. Go to Administration > Application Settings > Resources > [Select a category]. Select a category which contains skills and skill levels, such as "Education" or "Language".
The list view for the selected category appears.
2. Click a skill name. The skill entity form appears.
3. Under the Attribute descriptions section, enter a description for each competency level.
4. Click **Save**.

Resource Booking Planner

The resource booking planner provides a global view of bookings and resource utilization calculated per day, week, or month. You can drag bookings from one resource to another to reassign them, and you can also change the bookings start date, end date and duration with a simple mouse interaction. The resource booking planner provides a visual overview of bookings and utilization, and lets you identify and resolve booking conflicts and resource overutilization.

To enable the Resource Booking Planner feature, please contact OpenAir Customer Support. When the feature is enabled, the following role permissions and application settings are available:

- Role permissions
 - View resource planner
 - Create and modify bookings in the resource planner
- Application settings (Administration > Application Settings > Resources > Other Settings)
 - **Resource planner booking bar format - text options in drop down** — Select the default format for the text showing on booking bars.
 - **Disable daily option in resource planner** — Check this box to hide the Daily utilization calculation option for all resource booking planner users.

- ❑ **Disable monthly option in resource planner** — Check this box to hide the Monthly utilization calculation option for all resource booking planner users.
- ❑ **Disable weekly option in resource planner** — Check this box to hide the Weekly utilization calculation option for all resource booking planner users.

To access the resource booking planner, go to Resources > Bookings > Planner. If QuickViews are enabled for your account, you can also click **Booking Planner** from the QuickView window.

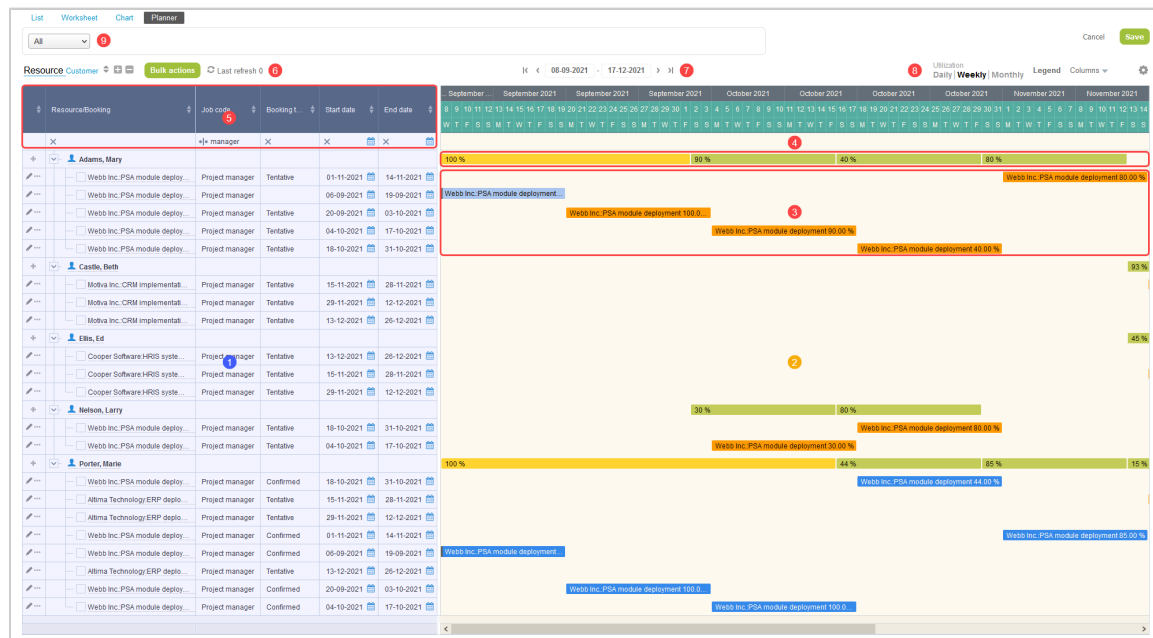
Review the following help topics:

- [Resource Utilization Overview in the Resource Booking Planner](#)
- [Breakdown by Customer, Project and Task in the Resource Booking Planner](#)
- [Creating, Editing, and Deleting Bookings in the Resource Booking Planner](#)
- [Resource Booking Planner View Options and Settings](#)





Resource Utilization Overview in the Resource Booking Planner



The resource utilization overview is the default resource booking planner view. It shows a list of resources and bookings with a graphical overview of bookings and utilization for each resource over a period of time.


To access the resource utilization overview, go to Resources > Bookings > Planner and click **Resource** in the resource booking planner toolbar.





1. **Resources and Bookings List** — The left part of the resource booking planner shows a list of resources and bookings for each resource. You can select which columns are shown on the list using the **Columns** panel available from the toolbar.
 - Icons next to the resource name indicate the type and status of resource.

-  **User, Jane** — Active resource currently assigned to the project.
-  **User, Jane** — Inactive resource currently assigned to the project. Resources with an inactive employee record cannot log in to OpenAir, and cannot record time or expenses, for example.
-  **Analyst [Generic]** — Active generic resource. Generic resources let you specify the kind of resource you want to book rather than a named individual. They can be useful as placeholders when planning a project if you do not know who will be conducting the work. Generic resources can only be used for forecasting — only named resources can record time and expenses.
-  **Analyst [Generic]** — Inactive generic resource.
- Click the arrow next to the resource name to expand or collapse the list of bookings for this resource.
- Drag a booking vertically from one resource to another to reassign it.

 **Note:** Bookings are grouped on one row and booking information is not shown if you choose the compact display option for Resources. To change the display options, click the settings icon .

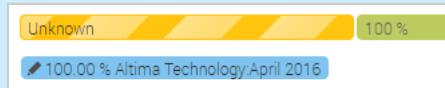
2. **Booking Grid** — The right part of the resource booking planner shows a graphical representation of bookings and resource utilization over the booking grid time span. Days, Weeks and Calendar Months are indicated at the top of the grid. You can control the time span using the time navigation panel in the toolbar.
3. **Booking bars** — Each booking is represented by a horizontal bar spanning the period the resource is booked for.
 - A black solid bar at the left or right extremity of the booking bar indicates that the booking extends beyond the start or the end of the time span displayed. Each bar is color-coded depending on the booking type and includes a label with summary information, and an icon indicating the approval status of the booking. You can control the color code and the text format in the resource booking planner settings form available when you click the settings icon .
 - Drag a booking bar horizontally to change the booking start date and keep the duration unchanged. You can drag the left or right edge of a booking bar to change both the booking start or end date and the booking duration.
 - Click and drag outside existing bars in the booking grid to add a new booking. The new booking form appears in a popup window. The form is prepopulated with resource, project, task, start date, and end date information according to the grid locations you click and drag to.
 - Click a booking bar to show a context menu with options to **Create** a new booking, **Edit** the booking, or **Duplicate** it. These actions are also available from the Actions column on the left.


 **Note:** Booking bars are grouped on one row if you choose the compact display option for Resources and there is no period overlap between bookings. Overlapping bookings show on multiple rows. To change the display options, click the settings icon .

4. **Utilization bars** — The utilization of each resource is represented by horizontal bars on the same row as the resource name. The utilization is calculated as a percentage of hours booked compared to the employee's work schedule on a daily, weekly or monthly basis depending on the option selected in the toolbar. The utilization shows as a continuous bar if the utilization is the same across several time granularity units. Each bar is color-coded depending on the availability of the resource. You can control the color code using the Chart color keys section of the resource booking planner settings form.


Note: The utilization information after the page is loaded or after you save changes.


- When the utilization is being calculated, the utilization shows as "Unknown".
- If you make changes to the bookings, such as changing the start or end date of a booking, for example, the impacted utilization bar shows as "Unknown" until you save the changes and the utilization is recalculated.




5. **Resource and Bookings List Column Headers** — The column headers include the following functionality:
 - **Sort Order** — Use the sort icons  to change the sort order using up to three sorting levels. See [Sorting Options](#).
 - **Column Filters** — Use column filters under the column headers to change the filter the list content. See [Filtering Data Using Column Filters](#).
 - **Column Position and Width** — Drag a column to change the column order. Drag the right edge if a column to change the column width.

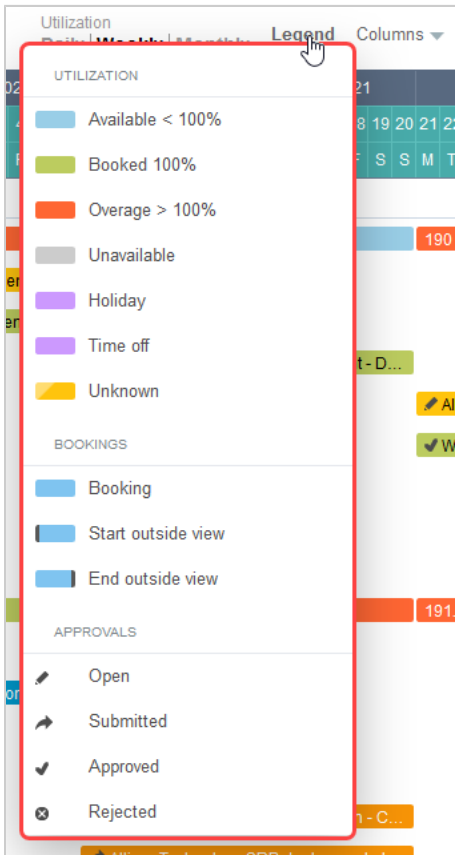
6. **Toolbar (Left)** — The left part of the toolbar includes the following functionality:

- **View Selector** — The resource booking planner lets you view a breakdown of bookings by resource or by customer, project, and task.
 - Click **Resource** to get an overview of resource utilization as described in this help topic.
 - Click **Customer** to get an overview of bookings by customer, projects and tasks. See [Breakdown by Customer, Project and Task in the Resource Booking Planner](#).
- **Sorting Reset** — Click the sorting icon  to reset the list to the default sort order.
- **Expand All/ Collapse All** —
- **Bulk Actions** — Check the box next to each booking you want to run the action on and click **Bulk Actions**. A window appears listing the available actions.

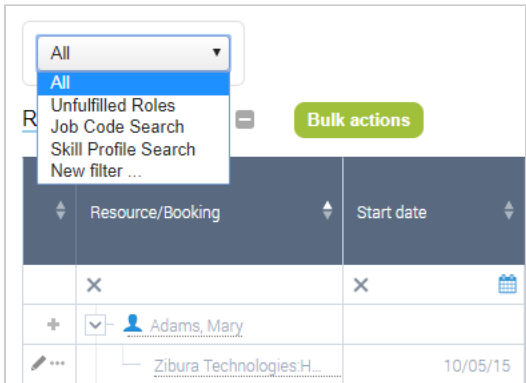
Note: You can hide the bulk actions check box in the display options. To do so, click the settings icon  then Disabled under Bulk actions.

- **Refresh View** — Click the refresh icon  to reload the page and view the latest data. The toolbar shows the time elapsed since the last refresh next to the refresh icon.
7. **Toolbar (Center) — Date Navigation** — Use the date navigation panel to control the booking grid time span. Click and select a start and end date. The maximum time span is 100 days. You can use the rewind, previous, next, and fast forward icons to move the time span backward or forward by 50% or 100% of the current time span.
 8. **Toolbar (Right) — Utilization Calculation and Display Options** — The right part of the toolbar includes the following functionality:
 - **Utilization Calculation Time Granularity** — Select the time granularity for the utilization granularity. The utilization is recalculated when you click a different granularity.
 - **Daily** — Utilization is calculated for each day. The share of each booking on each day is used for the calculation. The sum of booked hours per day is divided by the Day schedule.
 - **Weekly** — Utilization is calculated for each calendar week .

- **Monthly** — Utilization is calculated for each calendar month.
- **Legend** — Point to **Legend** to show a summary of the utilization color coding, and approval status icons.



- **Columns Selection** — Click **Columns** to display the List view columns flyout panel. Select the columns you want to include and specify the column order. Click **Apply** to validate your changes and return to your list view.
 - **Other Settings** — Click the settings icon ⚙️ to access the other resource booking planner settings. See [Other Settings](#).
9. **Advanced Filters** — Use advanced filters to show just the resources and bookings you want to see, or to manage the number of bookings displayed in the resource booking planner.





Important: The resource booking planner can display a maximum of 1,000 bookings. Use advanced filters to reduce the number of bookings displayed and show just the bookings you want to see. Reducing the number of bookings improves the performance and usability of the resource booking planner.

To review the number of bookings, resources and the time span shown on the resource booking planner, click the Tips button. The contextual tips include a summary such as "Showing 278 bookings and 89 resources in 91 days".

Breakdown by Customer, Project and Task in the Resource Booking Planner

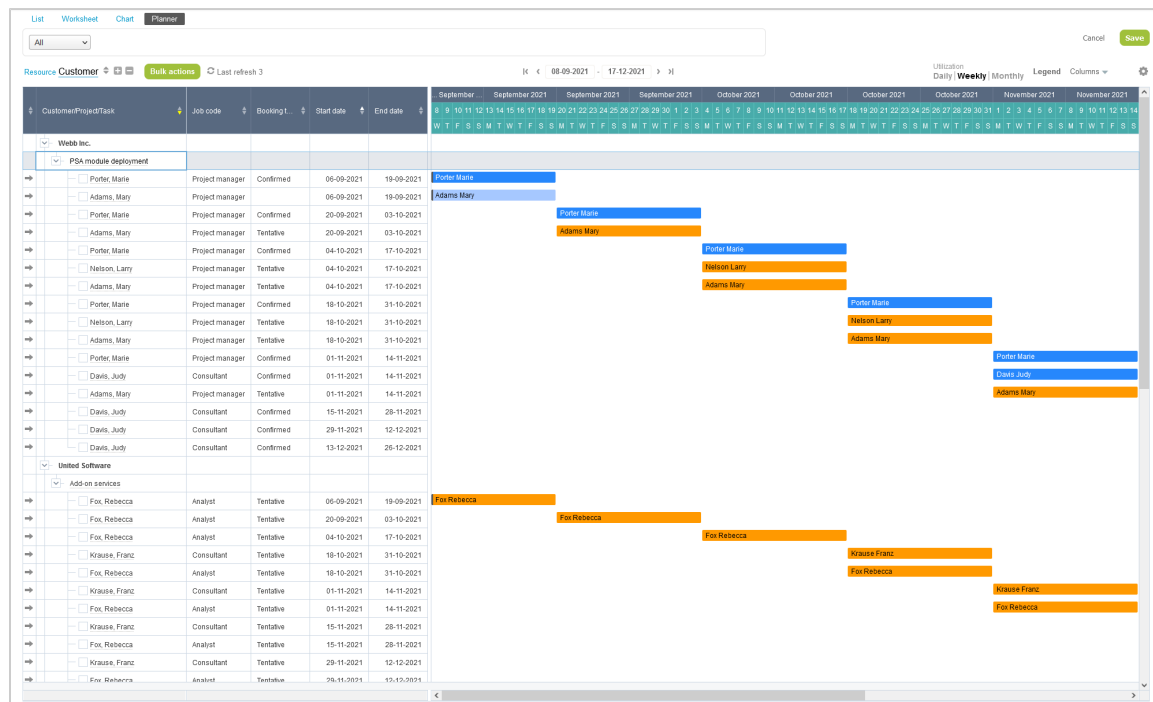
The resource booking planner lets you view a breakdown of bookings by customer, project and task with a graphical overview of bookings for each task over a period of time. It gives an overview of resources booked to each task and project, with indications of resource overutilization.

The functionality and information shown is similar to the resource utilization overview with the following differences:

- The list gives a breakdown by customer, project and task, instead of resource and bookings.
- Resource utilization information is not available.
- Overutilization (or Overage) is indicated with a red outline around the relevant booking bars.
- The Actions column includes a go to action only. Click the arrow icon to view the booking in the resource utilization overview. From there, you can identify what causes the overage and resolve it.

See also [Resource Utilization Overview in the Resource Booking Planner](#).

To access the bookings by customer, project and task overview, go to Resources > Bookings > Planner and click **Customer** in the resource booking planner toolbar.




Creating, Editing, and Deleting Bookings in the Resource Booking Planner

You can create, edit and delete bookings from the resource booking planner.


Creating Bookings

To create a new booking, do one of the following:

- From the resources and bookings list, click the add booking icon  next to the resource name. The New booking form appears with the **Resource** field prepopulated. Enter all required information and click **Save & Submit**, **Save**, or **Save & create another**. The utilization is recalculated automatically after you add the booking.
- From the booking grid, click and drag in the same row as an existing booking bar. The New booking form appears with prepopulated **Resource**, **Client : Project**, **Task**, **Start** and **End Date**, and **Book by** information based on the existing booking on that row. Click **Save** in the resource booking planner to save the new booking and other changes made in the booking grid and trigger the utilization calculation.

Editing and Deleting Bookings

To edit a booking, do one of the following:

- From the resources and bookings list, click the **edit** icon . The Edit booking form appears. Make changes as required and click **Save** or **Save & Submit**.
- You can edit the booking start date and end date inline in the resources and bookings list. You can also:
 - Drag a booking bar horizontally to change the booking start date and keep the duration unchanged.
 - Drag the left or right edge of a booking bar to change both the booking start or end date and the booking duration.
- To reassign a booking, drag this booking vertically from one resource to another in the resources and bookings list. Click **Save** in the resource booking planner to save all changes and recalculate the utilization.
- Point to a booking, task, or resource to show the QuickView for that item, then create a new booking, or edit, delete, or clone an existing booking from the QuickView.
- Click the more options icon ******* next to a resource name, then click **Create**, **Edit**, **Duplicate** or **Delete** the booking.
- If bulk actions are enabled, check the boxes next to each booking or task, then click **Bulk Actions** to make changes to all selected items at the same time. It is possible to select an item only if you have the appropriate role permissions.

You can choose **View the selected bookings in the bulk editor** on the bulk actions form. The Bulk Booking Editor feature lets you make changes to multiple fields for all selected bookings at the same time. You can then save or save and submit the modified bookings, or apply the changes to duplicate bookings and save, or save and submit the duplicate, if you want to keep the original bookings unchanged.

Note: To enable the Bulk Booking Editor feature, contact OpenAir Customer Support. OpenAir Customer Support can also configure the Booking Bulk Editor to prevent the following changes:

- ▣ Bookings for multiple resources reassigned to a single resource.
- ▣ Resource and customer both modified.

Account administrators control who can access the booking bulk editor by role permission:

- ▣ View and modify bookings in the bulk editor
- ▣ View, modify, and duplicate bookings in the bulk editor

Resource Booking Planner View Options and Settings

The following view options and settings are available for the resource booking planner:

- [Sorting Options](#)
- [Filtering Data Using Column Filters](#)
- [Column Width and List-Grid Divider](#)
- [Other Settings](#)

Sorting Options


You can sort the resource booking planner data by column using the sort icons in the column headers.

This feature supports ascending and descending sort orders and multi-level sorting up to three levels. The arrows in the column header indicate the sort order and sorting levels:

- Sorting levels are color-coded:
 - ▣ White color arrow — Primary level

- Yellow color arrow — Secondary level
- Green color arrow— Tertiary level
- The colored arrow indicates the sort order for each sorting level:
 - Arrow pointing up — Ascending sort order
 - Arrow pointing down — Descending sort order

Click a column header to select that column as your primary sort field. Click the same column header again to change the sort order. If you click a different column header, this column becomes your primary sorting level, the previous primary level becomes the new secondary level and the previous secondary becomes the new tertiary level.

To reset the sort order to the default one, click the sort icon  in the toolbar.

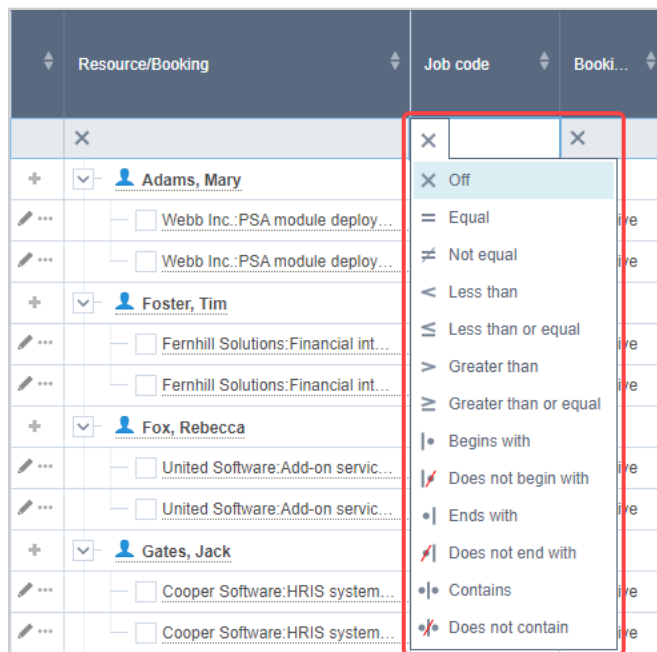
Filtering Data Using Column Filters

You can use column filters to show just the resources and bookings you need. For each column filter, you can specify a criteria by selecting an operator and entering a value. After you set column filters, the resource booking planner shows only the matching information.

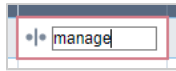
To filter data using column filters:

1. Click the icon in the filter cell under the column header. The icon may be different depending on the column filter currently applied.

The operator dropdown list appears. It includes the following options: Off, Equal, Not equal, Less than, Less than or equal, Greater than, Greater than or equal, Begins with, Does not begin with, Ends with, Does not end with, Contains, Does not contain.



2. Select an operator for your filter criteria.
3. Click the space next to the operator, enter a value and press Enter.



The resource booking planner only the matching information.


Column Width and List-Grid Divider

You can change the width of columns on the left part of the resource booking planner by dragging the right border of each column.

You can move the divider between the list on the left and the grid on the right by dragging it to the desired size.

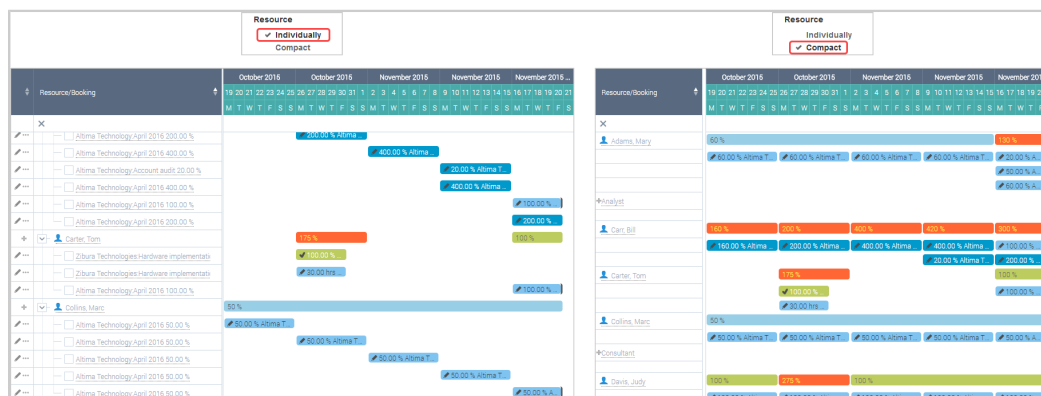
Note: For very small date ranges, the width of the grid is set automatically and cannot be changed.

Other Settings

Click the settings icon  to access the other resource booking planner settings.

- Customize list view** — Select the columns to display on the left side of the resource booking planner view and specify the column order. The **Available** list shows all the columns you can add. The **Selected** list shows all the selected columns. Use the links to move items between the Available and Selected lists. Click a column in the **Selected** list and click the up and down arrow to change the position of this column.
- Settings** — The resource booking planner settings form lets you control the color-coding of booking bars by booking type, the information shown on the booking bar labels booking bar, and the color-coding of utilization bars depending on resource availability. You can also opt to **Include active resources without bookings** and **Include inactive resources with bookings**, which are excluded by default.
- Resources** — Click **Individually** to show each booking on a separate row. Click **Compact** to show all bookings on the same row.

If you choose the compact display option, the list on the left no longer shows booking information, and booking bars are grouped on one row except when there is a period overlap between bookings. Overlapping bookings show on multiple rows.



- Bulk actions** — Click **Enabled** to show the bulk actions check boxes for each booking row. Click **Disabled** to hide the bulk actions check boxes.

Resource Compare View

The Resource Compare View allows you to compare resources at a glance and better manage large pools of resources. Add resources to the view, and then compare them side by side. You can select favorite skills and demographics, and create bookings from within the view.

Compare View			
<div>+</div> Create <div>Home</div> <div>Opportunit...</div> <div>Projects</div> <div>Resources</div> <div>Invoices</div> <div>Timesheets</div> <div>Expenses</div> <div>Purchases</div> <div>...</div>	Comparison table <div>You have selected 6 resources to compare.</div> <div>Resource availability</div> <div>2022-01-24 - 2022-04-23</div> <div>ADD RESOURCE</div>	<div>Adams, Mary</div> <div>JOB CODE PM</div> <div>EMPLOYEE LOCATION</div> <div>CREATE BOOKING</div>	<div>Carr, Bill</div> <div>JOB CODE</div> <div>EMPLOYEE LOCATION</div> <div>CREATE BOOKING</div>
	<div>Availability</div> <div>Utilization</div> <div>Availability</div> <div>Job role</div> <div>Analyst</div> <div>PM</div> <div>Trainer</div> <div>Language</div> <div>Spanish</div> <div>Product knowledge</div> <div>BI</div> <div>CRM</div> <div>HRMS</div> <div>Payroll</div> <div>Tech skills</div> <div>HTML</div> <div>JavaScript</div> <div>MS SQL</div>	<div>520 hrs.</div> <div>520 hrs.</div> <div>Tertiary</div> <div>Primary</div> <div>Secondary</div> <div>Elementary</div> <div>×</div> <div>✓</div> <div>×</div> <div>×</div> <div>Intermediate</div> <div>×</div> <div>×</div>	<div>520 hrs.</div> <div>520 hrs.</div> <div>×</div> <div>×</div> <div>×</div> <div>×</div> <div>×</div> <div>×</div> <div>×</div> <div>×</div> <div>×</div> <div>×</div> <div>×</div> <div>×</div>


To enable the Resource Compare View

1. Ensure that your account has access to the Resources module.
2. If the user is not an administrator, ensure that the user's role has the "Enable Resource Compare View" role permission.
3. To add resources to compare from a resource QuickView, ensure that QuickViews are enabled for the user.

There are three ways to add resources to the Resource Compare View within OpenAir.

To add resources to the Resource Compare View

- Point to any field which opens a resource QuickView, and click "Add to compare".
- In any list view which shows resources, the Resource Request Queue "Search and Propose" screen, or in Custom Search results, select the checkbox in the Bulk actions column next to each resource you want to compare, then click the "Bulk actions" or "Select..." dropdown list and click "Add to compare."
- In the Resource Compare View, click the "Add Resource" button.

As you add resources to compare, the counter on the left sidebar changes to indicate how many resources are in the Resource Compare View. Click this counter to open the "Resource Comparison" window, which shows the resources you will compare. To remove resources from this list (and from the Resource Compare View), click the  icon next to the resource's name.

Note: The Resource Compare View has a default limit of 50 resources which can be compared at one time. To increase this limit, go to Administration > Application Settings > Resources Settings > Resource compare view options and enter a new maximum value in the "Maximum number of resources to display in Resource Compare View" text field. This text field accepts any number values up to 200.

To open the Resource Compare View



There are two ways to navigate to the Resource Compare View:

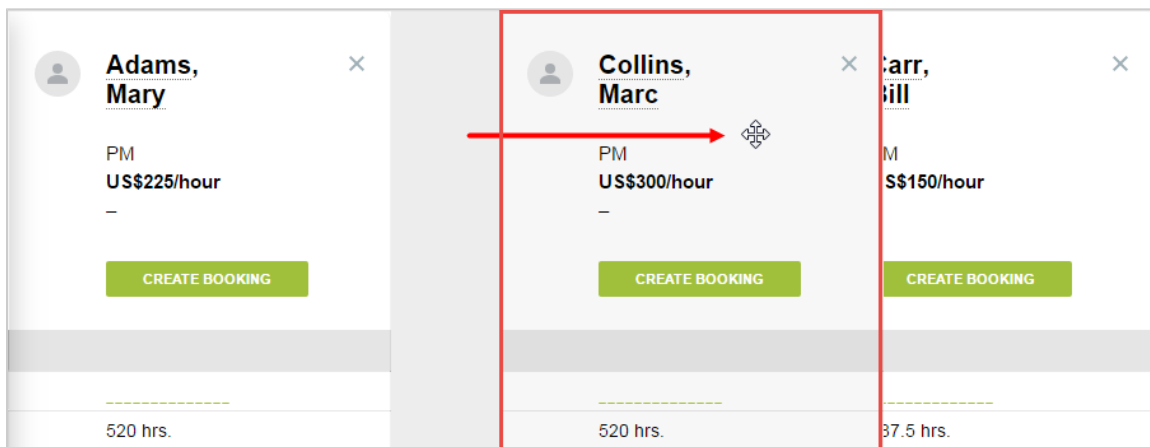
- Click the "Compare View" button in the "Resource comparison" window.
- Go to Resources > Compare view.

Using the Resource Compare View

While in the Resource Compare View, add resources to compare by clicking the "Add Resource" button and selecting them from a multi-select list. Left click on an un-selected resource name in the list, and they will be added to the Comparison table. Left click a selected resource to remove it from the comparison.



To filter resources based on their availability, click the icon next to the "Resource availability" field and enter or select start and end dates.

Compared resources are shown side-by-side in the Comparison table. Rearrange the resources in the Comparison table by dragging them to new positions on the table. To remove a resource from the Comparison table, click the  icon in the top right corner of that resource's card. To remove all resource from the comparison, click the  icon and select "Remove all resources".



By default, resources' rates are hidden in the Resource Compare View. To display each resource's rates in the header of the resource cards, go to Administration > Application Settings > Resources Settings > Resource compare view options and select the "Display employees' rate" option under Header settings.


You can also set which three fields appear under each resource's name in the Resource Compare View header. Any user demographic or custom fields can be selected to appear in the heading. See [Customizing Resource Compare View Headers](#).

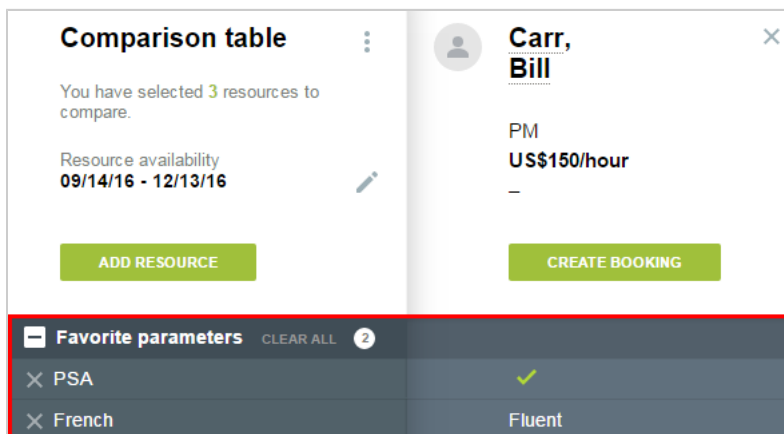
To hide skills categories such as Product knowledge or Tech skills, click the  icon near the category title. Click the  icon next to category title to expand that list of attributes. The numbers next to the category title indicate how many attributes are in that category.

Point to a Resource name in the header to open a QuickView window with details for the resource and links to perform resource-related actions.

As you scroll down the category skills category list, the resource name headers remain in view.

Setting favorite skills or attributes in the Resource Compare View

You can select favorite categories which are moved to their own "Favorite parameters" row near the top of the Comparison table. This category remains visible even if you add or remove resources from the table. To set a favorite skill or attribute, click the  icon next to the skill or attribute.



The Demographics category in the Resource Compare View

The Demographics category includes standard fields, and can be further customized in Administration > Application Settings > Resources Settings > Resource compare view options. Here you can choose to include or exclude custom fields and some standard fields. To enable this feature, add the "Modify Resource Compare View options" role permission to all roles which you want to access it.

Booking Resources from the Resource Compare View


To book a resource from the resource compare view:

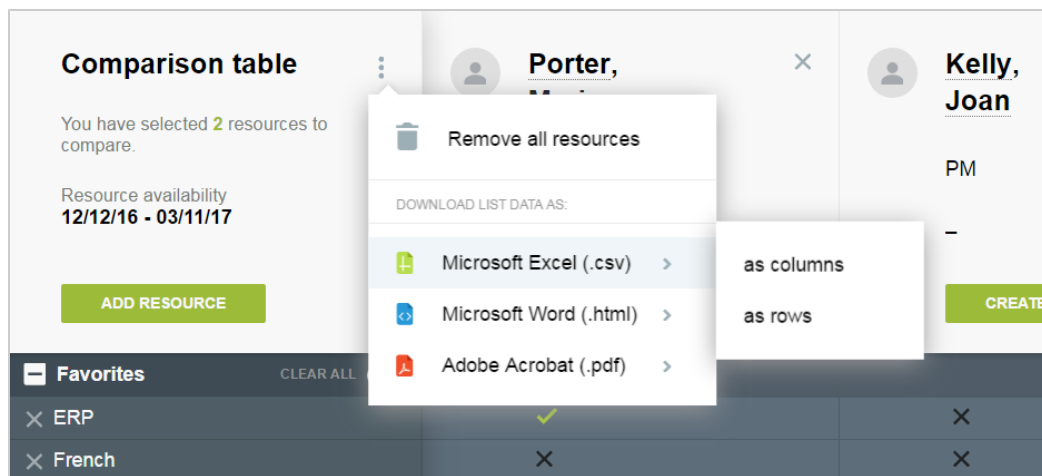
1. Click the "Create Booking" button in the Resource card header. A "New booking" form opens.
2. Enter the booking's details in the "New booking" form.

Note: When the New booking form first opens, the booking dates are based on the “Resource availability” dates set in the Comparison Tool, but can be changed when entering the booking information in the form.

Downloading Resource Compare View Data

You can download resource compare view data in a variety of formats.

1. Navigate to the Resource Compare View's Comparison table.
2. Click the  icon. A window opens with options to download the Resource Compare View's list data.
3. Point to the file format you would like to save the data as. A window opens where you can select to save the data as columns or rows.



- Click “as columns” to save resource data vertically in your downloaded file. This format most closely replicates the data as it appears in the Resource Compare View's Comparison table, with each column representing a resource.
- Click “as rows” to save resource data horizontally in your downloaded file. In this format, each row represents one resource.

Filtering or Removing Inactive Resources from the Resource Compare View

To filter or remove Inactive resources from Resource Compare View selector:

1. Go to Administration > Application Settings > Resources Settings and clear the **Include inactive resources** option.

Customizing Resource Compare View Headers

Set which three fields appear under each resource's name in the Resource Compare View header. Any user demographic or custom fields can be selected to appear in the heading.

Comparison table

You have selected **10** resources to compare.

Resource availability
04/10/17 - 07/09/17

ADD RESOURCE

Carr, Bill

FIRST NAME
Bill

JOB CODE
PM

HOURLY RATE
£150

CREATE BOOKING

Availability	2
Utilization	
Availability	487.5 hrs.
Job role	4
Analyst	Tertiary
Consultant	Secondary
PM	Primary
Trainer	Tertiary

To select which fields appear in the Resource Compare View headers

1. Go to Administration > Application Settings > Resources Settings > Resource compare view options.
2. Select the fields to display in the "Header settings" section of the Resource Compare View Options form.

Note: If you try to set more than three fields in the header, you will receive an error message.

Advanced Resource Search

With Advanced Resource Search, enter the parameters, skills, and demographics you're looking for, and OpenAir does the rest. Search for availability, resource type, and entity tags. Mark parameters as "Required" and OpenAir will make sure that the search results will only return candidates with those skills.

Note: This feature is enabled by default, and all users with access to the Resources module can use it. To control access to this feature, please contact OpenAir Support to enable the **View Advanced Resource Search** role permission, which can be used to limit access to specific roles.

To search for a resource:

1. Go to Resources > Search > Advanced Resource Search.
2. Enter the General search parameters in the **General parameters** tab.

Advanced Resource Search

General parameters Skills & Experience

Choose search

Select or search...

Resource type filter ON

☐ regular resources ☐ generics

☐ inactive resources

Hourly cost ON

CURRENCY: USD MINIMUM: 30 MAXIMUM: 70

0 106

Availability ON

DATE PERIOD: Set period

AVAILABILITY DESIGNATION: Set designation

LIMIT AVAILABILITY (search to specific booking type): Select...

☐ Allow no intervening bookings when determining availability ☐ Show unavailable resources

Entity tags + ON

EFFECTIVE DATE (employee entity tag effectivity date): Select date

Resource hierarchy filter ON

Resource hierarchy

Defined parameters matched: 28 resources

SEARCH

- Resource type filter** – filter the types of resources which are included in the search. If no options are selected, Advanced Resource Search will search for all resource types. If you select an option (for example, “regular resources”), Advanced Resource Search will only search for the selected type of resource. Click the toggle button next to the **Resource type filter** heading to disable filtering by Resource type.
- Hourly cost** – define the hourly cost range for the resources. Select a **Currency** and define a **Minimum** and **Maximum** hourly costs either by typing the figures in or using the sliders underneath. The hourly cost search parameters are empty by default. Once the **Currency** is set, the **Minimum** and **Maximum** values are automatically set to the minimum and maximum hourly cost values in the account. The number of matches is recalculated automatically

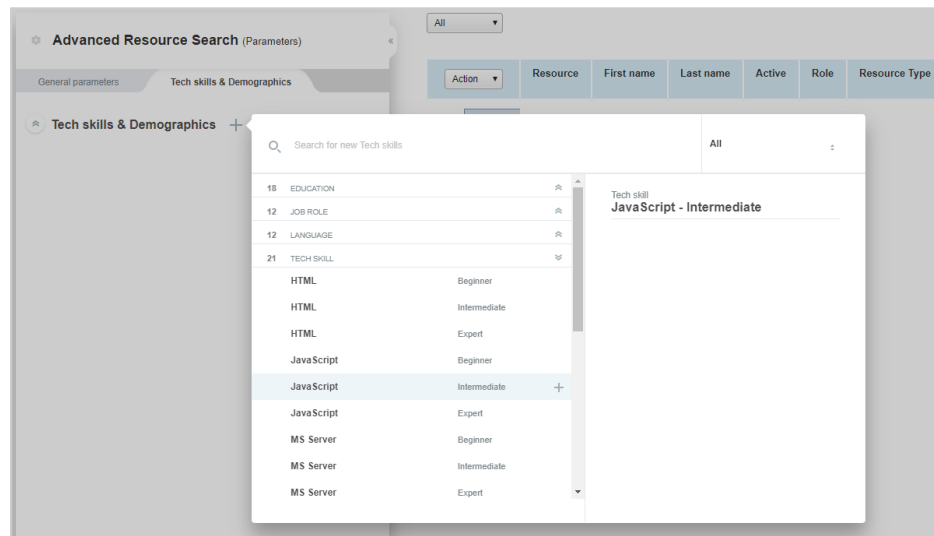
whenever the range is changed. The hourly cost criterion is defined in terms of primary loaded cost. Only users with the **View primary loaded costs** role permission can view and use this search parameter. Click the toggle button next to the **Hourly cost** heading to disable searching by hourly cost.

- **Availability** – you can set the **Date period** for when you will need the resources, their availability by percentage or hours, or limit their availability to specific booking types. Select the **Allow no intervening bookings when determining availability** option to prevent Advanced Resource Search from including resources with existing bookings which conflict with your search period from being included in the results. Click the toggle button next to the **Availability** heading to disable searching by ability.
- **Entity tags** – set search criteria for Entity tags here. Click the toggle button next to the **Entity tags** heading to disable searching by Entity tags.
- **Resource hierarchy filter** – Advanced Resource Search supports hierarchies when searching. Click the toggle button next to the **Resource hierarchy filter** heading to disable filtering by Resource type.

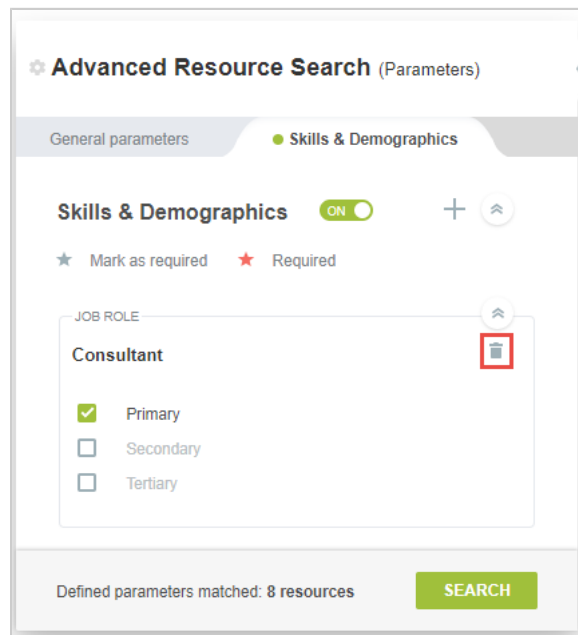
The screenshot shows the 'Advanced Resource Search' interface. The 'General parameters' tab is active. The 'Choose search' dropdown is set to 'Select or search...'. The 'Resource type filter' is turned ON, with 'regular resources' and 'inactive resources' options. The 'Hourly cost' filter is also turned ON, with 'CURRENCY' set to 'USD' and 'MINIMUM' and 'MAXIMUM' values set to 'No data'. The 'Availability' filter is turned ON, with 'DATE PERIOD' set to 'Set period' and 'AVAILABILITY DESIGNATION' set to 'Set designation'. The 'Entity tags' filter is turned ON, with 'EFFECTIVE DATE' set to 'Select date'. The 'Resource hierarchy filter' is turned ON, with 'Employee Geography' set to 'Select...'. A 'Select options' modal is open, showing a list of regions: 'North America', 'USA', and 'New York'. The modal has a search bar, a 'SELECT ALL' button, and a 'CLEAR ALL' button. The 'OK' button is highlighted in green.

3. Enter the Skills you would like the resources to have in the **Skills & Demographics** tab.

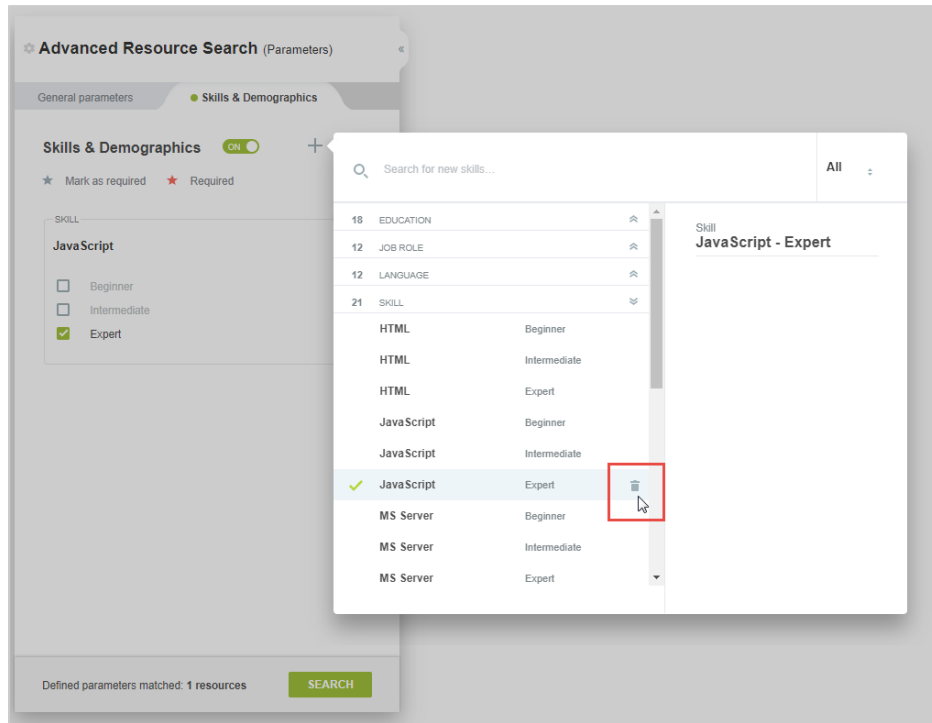
- To add a skill to the search, first click the Add new **Skills / Demographics** **+** icon. Then select a skill category and click the **+** icon next to the skill you want to add to the search.



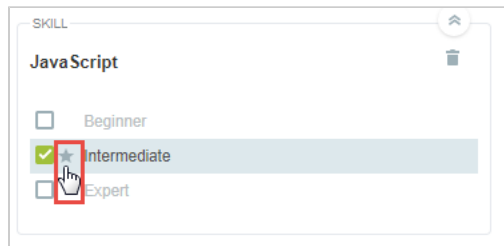
- To delete a skill from the search, click the **Delete** icon to the right of the skill name in the **Advanced Resource Search Parameters**.



Alternatively, you can delete a skill from the search by clicking the **Add new Skills / Demographics** icon selecting the skill category of the skill to delete, and clicking the **Remove Skill** icon next to the skill you want to remove from the search.



- To mark a skill as required, point to the skill and click the **Required** icon. The search will only return resources who have this skill.



Note: Some skills may have multiple levels of expertise or knowledge assigned to them (for example, JavaScript might have a Beginner, Intermediate, and Expert level of knowledge). Advanced Resource Search searches for each of these skill levels differently depending on how your skill profiles are set up.

For example, if you only allow a user to have only one level for JavaScript, and mark “Intermediate” JavaScript as required, Advanced Resource Search will return users with the “Intermediate” skill levels.

If no skills are marked as required, and you select “Intermediate” and “Advanced” JavaScript, Advanced Resource Search will return candidates with either of these skills. Resources without “Intermediate” or “Advanced” JavaScript will also appear, but will be ranked lower.

You can also search for resources with any level of required skills by marking a skill as required when looking for resources in Advanced Resource Search, and then selecting which skill levels you want to search for. When a skill is marked as Required, Advanced Resource Search will return candidates who possess any of the levels for this skill which you selected.

To set whether a skill or skill level is required or not in Advanced Resource Search:

1. Click the star icon next to the skill name. A red star icon indicates the skill is required, while a clear star icon indicates it is not required.
2. Select the skill levels you want to search for.

The screenshot shows the 'Advanced Resource Search' interface. At the top, there's a 'Skills & Experience' section with a toggle switch set to 'ON'. Below this, there's a 'Mark as required' button with a star icon and a 'Required' button with a red star icon. Under the 'EDUCATION' category, the 'BI' skill is marked as required with a red star. Below it, there are three skill levels: 'Beginner' (checked), 'Intermediate' (checked), and 'Expert' (unchecked).

When you run the search, Advanced Resource Search will return resources who have either of the skill levels you selected. For example, if you select the BI skill, and also

select the Beginner and Intermediate levels for BI, Advanced Resource Search will return resources who have either Beginner BI experience or Intermediate BI experience.

- As you enter search criteria, the **Defined parameters matched** field updates to indicate how many resources your search will return.

4. Click **Search** to get the list of resources which match your search criteria.

You can also save searches in Advanced Resource Search.

To save a search in Advanced Resource Search:

1. Click the **Menu** icon in the **General parameters** tab.
2. Click **Save search settings**.
3. Name the search (required) and provide a description for it (optional).
4. Click **Save**.

To copy a search and save the copy in Advanced Resource Search:

1. Click the **Menu** icon in the **General parameters** tab.
2. Click **Copy and save**.
3. Name the copy of the search (required) and provide a description for it (optional).
4. Click **Save**.

To delete a saved search in Advanced Resource Search:

1. Click the **Menu** icon in the **General parameters** tab.
2. Click **Delete**.
3. Click **OK** to confirm the deletion.

Users with the Modify Advanced Resource Search options role permission can customize the Advanced Resource Search form to show or hide any of the general search parameters.

To show or hide sections in the general search parameters tab

1. Go to Administration > Applications Settings > Resources Settings > Advanced resource search options.
2. Select the section you want to show in the Advanced Resource search and leave the sections you want to hide unchecked.
3. Click **Save**.

Note: The Skills & Experience parameter section is always shown.

The screenshot shows the 'Administration' section with 'Resources Settings' selected. The 'Advanced resource search options' tab is active. A modal window titled 'Advanced Resource Search Options' is displayed, containing the following settings:

- ☐ Show section Resource type filter
- ☒ Show section Hourly cost
- ☒ Show section Availability
- ☒ Show section Entity tags
- ☒ Show section Resource hierarchy filter

Buttons for 'Cancel' and 'Save' are located at the top and bottom of the modal.

Resource Demand Request (RDR)

The Resource Demand Request (RDR) optional feature lets you find and assign resources with specific sets of skills to your projects. To use the feature, first create a resource request, which acts as a folder for individual resource request queues. Resource request queues are searches for resources with specific characteristics, such as language proficiency, product knowledge, or job roles. You can then book resources from your resource requests, and download the information for later use. For more information, see the following help topics:

- [Creating a Resource Request](#)
- [Creating and Editing a Resource Request Queue](#)

- Exporting Resource Demand Request (RDR) Search Results
- Deleting a Resource Request or Resource Request Queue

Note: Resource request records support custom fields — See [Custom Fields](#). Custom fields associated with resource requests are automatically visible in the resource request queues list view and available for the resource request queues detail report.

To enable this feature, contact OpenAir Customer Support.

Resource Demand Request (RDR) Recommended Workflow



Creating a Resource Request

Resource requests act as a folder for detailed resource searches, or resource request queues. Every resource request queue must be in a resource request.

To Create a resource request:

1. Go to Resources > Resource requests.
2. Click the Create button.
The Create menu appears.
3. Under **Resource request**, do one of the following:
 - To create a resource request only, click **New ...**
The New resource request form appears. After you enter all information and save the form, the Resource Request Queue appears.
 - To create a resource request and add a resource request queue to the new resource request record, click **New, quick ...**
The New quick resource request form appears
4. Enter all required information (indicated by an asterisk). The fields included on the form depends on the option you chose in the previous step.
Both forms include the following fields:
 - **Name** (Required) — Give the request a name.
 - **Resource request number** — Automatically filled in with the next number in sequence, based on the last resource request. You can also enter your own resource request number.
 - **Default Client : Project** (Required)— Select the client and project for which this request is used by default. If the client and project you want are not present in the dropdown list, select **Find more...** or click the search icon to search for a client or project by name.

- **Expected start date** — Enter the expected start date for the resources to start work. Click the Calendar icon to open a calendar to choose the date.
- **Duration** — Enter the duration which the resource will work on the project. In the first dropdown, select a number between 1 and 31, and in the second dropdown, select either Days, Weeks, Months, Quarters, or Years.
- **Start date** — Enter the start date for the resource's assignment.
- **End date** — Enter the end date for the resource's assignment.



Note: You can specify either:

- The **Expected start date** and a **Duration**
- The **Start date** and a **End date**

Both field pairs are mutually exclusive. Entering the **Expected start date** and a **Duration** hides the **Start date** and a **End date** fields, and vice versa.

- **Booking type** (Required) — Select either Confirmed, Open, Pending, Rejected, or Tentative. When this field is displayed in a resource request queue, its value is read-only and based on the setting from the associated resource request.
- **Notes** — Enter any notes for the resource request.
- **Attachments** — Add any file attachments here. Attachments can include documents such as résumés, statements of work, etc.

The New quick resource request form includes additional fields to create a resource request queue with the resource request. See [Creating and Editing a Resource Request Queue](#).

5. Click **Save**.


After you enter all information and save the New resource request form, the New resource request queue form appears. See [Creating and Editing a Resource Request Queue](#).

After you enter all information and save the New quick resource request form, the resource request record appears.

Creating and Editing a Resource Request Queue

After you create a resource request, you can add resource request queues to your resource request. Resource request queues are searches for resources with specific characteristics, such as language proficiency, product knowledge, or job roles.

To create and edit a resource request queue:

1. Go to Resources > Resource Requests > *[Select a resource request]* > resource request queues.
2. Do one of the following:
 - Click the Create button, then **New ...** under **Resource request queue**
 - Copy an existing resource request queue by clicking the copy icon  in the Action column on the resource request queue list view.


The Resource request queue form appears.



Note: You can also:

- Create a resource request when creating a resource request queue. See [Creating a Resource Request](#).
- Select and duplicate multiple resource request queues using the list view bulk actions functionality.

3. Enter all required information (indicated by an asterisk).

- **Name** — Assign a name to the resource request queue.
- **Resource request queue number** — Automatically filled in with the next number in sequence, based on the last resource request queue. You can also enter your own resource request queue number.
- **Client : Project** (Required)— Select the Client and Project which this request queue is used for. If the client and project you want are not present in the dropdown list, select **Find more...** or click the search icon  to search for a client or project by name.
- **Resource request queue status** — Select either Open, Partial, Complete, or Cancelled.
- **Resource request requester** — This field is automatically populated with the person creating the request.
- **Resource request queue quantity** — Enter how many resources you need who have the desired skills or experience.
- Enter a **Start date** and **End date** for the bookings.
- **Notes** — Enter any notes for the resource request queue.
- **Select type of resources to include in search** — Select whether to include regular resources (which are actual, active people), generics (which are placeholder roles), or inactive resources (which are people who aren't active and cannot enter time, etc. to any project). You can also select to allow no intervening bookings when determining availability.
- **Availability** — Select whether the queue factors in percentage of time or number of hours when determining availability. Click > Create next to Limit availability search to specific booking types to limit the search to Confirmed, Open, Pending, Rejected, or Tentative availability.
- **Base Criteria** — Select the criteria used in the resource request queue. There are four different categories to which you can assign searchable skills and experience. Click **Add new** in any of the base criteria fields to open a window and select Job roles, Languages, Product knowledge, Tech skills, or Travel preferences.
 - **Required** — A resource must have these features to be included in the resource request queue.
 - **Desired** — A resource with these characteristics is ranked higher in the search results, but these characteristics are not required to be included in the queue.
 - **Nice To Have** — A resource with these characteristics is ranked lower than those with desired characteristics, but higher than a resource without them. These characteristics aren't required to be included in the queue.
 - **Excluding** — A resource with these characteristics will be excluded from the queue.

Check the **One matching attribute is enough** box to include resources who have any of the selected attributes, rather than all of the selected attributes. This feature is particularly useful when searching for employees with a minimum level of expertise or better.

Note: When the **One matching attribute is enough** box is checked, employees with only one matching attribute are treated as a 100% match.

To use this feature, first go to Administration > Application Settings > Resource Profiles and clear the **Allow duplicates per resource** box for each profile type. The **One matching attribute is enough** box is not available on the resource request queues base criteria popup window if the **Allow duplicates per resource** box is checked for the profile type.

The screenshot shows a 'Profiles' popup window. On the left, there's a list of attributes: Language, Product knowledge, Tech skill, and Travel preference. Under 'Tech skill', 'JavaScript' is selected. To the right, there's a 'Category' section with 'Required', 'Desired', 'Nice to have', and 'Excluding' tabs. Below that, 'Tech skill' is set to 'JavaScript'. Under 'Expertise', there are buttons for 'Any', 'Beginner', 'Intermediate', and 'Expert'. The 'One matching attribute is enough' checkbox is checked and highlighted with a red box. At the bottom, there is a 'Done' button.

- **Attachments** — Add any file attachments here. Attachments can include documents such as résumés, statements of work, etc.
- 4. Click **Search and Resource request queue select action** to run the resource search and display the resource request queue.

The resource request queue record is saved and the Search and Propose page appears.

Resource request 7
Zibura Technologies: Spanish Speaking CRM Consultants

Resource request queues | Resource request queue select actioned Resources | Booked Resources | Properties | Resource request finalize | 0%

Spanish Speaking Payroll [Autofill](#) [Save](#)

Resources - 5 Resource request queue slots [Click Autofill to automatically add resources to Resource request queue slots](#)

Booking priority | Resource name | Base match | Status

1
2
3
4
5

Select... [Select](#)

Adams, Mary
Admin, Jim
Carr, Bill
Carter, Tom
Collins, Marc
Davis, Judy
Doe, John
Foster, Tim
Garcia, Juan
Kwan, Jane
Vila, Sally
Find more...

You can directly select resources to add to Resource Request Queue slots here.

Hide Criteria [Edit your search criteria here, and click Search to refresh the search results.](#)

Availability: 160.00 Available hours

Required: Language Spanish - Any X Product knowledge Payroll X

Desired: Tech skill MS SQL - Any X

Nice To Have: Job role PM - Any X

Excluding: Add new

[Add new](#) [Search](#)

Matched 2 resources.

100%	Adams, Mary	Primary loaded cost 35.00-USD	Select	Desired MS SQL	Nice to have PM
78%	Nugent, Tara	Primary loaded cost 55.00-USD	Select	Nice to have PM	Missing MS SQL

Search results appear here. Click **Select** to add a resource to a Resource request queue slot above

- Use the Search and Propose page to select resources and book them tentatively. The page shows the base criteria you selected previously and lists matching resources, with additional information such as a matching score, cost information and the search criteria they match.
 - Click the settings icon, then **Customize employee details** to customize the list and select the information shown on the list. You can also download the search results a HTML, CSV or PDF file, and select which information to include in the download file.

Availability: 1776.00 Available hours

Required: Job role Analyst - Any X

Desired: Product knowledge CRM - Any X

Nice To Have: Add new

Excluding: Add new

[Add new](#) [Add new](#)

[Search](#)

Matched 7 resources.

Select...

[Customize employee details](#)
[Select columns for download](#)
[Download search results](#)

<input type="checkbox"/>	100%	Select	Adams, Mary Primary loaded cost 35.00-USD	Desired CRM
<input type="checkbox"/>	100%	Select	Ellis, Ed Primary loaded cost 66.62-USD	Desired CRM
<input type="checkbox"/>	60%	Select	Carter, Tom Primary loaded cost 30.00-USD	Missing CRM

- Edit your search criteria, if required and click **Search** to find matching resources.
- Add matching resources to the Resource Comparison tool using the dropdown field above the matching resources list. See [Resource Compare View](#).
- Click **Select** in the matching resources list to add a resource to a resource request queue slot.
- Click **Autofill** to add matching resources to resource request queue slots automatically.
- Add any resources directly to resource request queue slots using the dropdown field under the resource request queue slots.
- Click the arrows \updownarrow under Booking priority to change the booking priority of the resource request queue slots.

Note: An optional feature replaces the booking priority ranking with a simpler method which lets you mark favorite resources without ranking them.

- If the feature is enabled for your account, click the star to mark or clear a resource as favorite in the resource request queue slots.

Database expert new - 1 Autofill Save

Resource request queue slots

★	Resource name	Base match	Status
★	Collins, Marc	75%	Pending X
★	Foster, Tim	25%	Pending X
★	Kwan, Jane	25%	Pending X

- To enable this optional feature, contact OpenAir Customer Support and request the following setting: **Use recommendations instead of ranking for resource request queue prioritization.**

6. Click **Save** to add the selected resources to the queue and return to the resource request queue properties form. The Resources section of the form shows the resource request queue slots you selected, with utilization forecast information. The selected resources are added to the **Resource request queue select actioned resources** sublist in the resource request record.
7. Click **Book** to book these resources tentatively to the project. A confirmation screen will ask you to confirm the bookings. The bookings will be listed in the **Booked Resources** sublist after the bookings are confirmed.

Note: Booked resources still need to be approved. Click **Resource request finalize** in the resource request record header to finalize the resource request and approve all bookings.

You can use the Resource Request Queues Require Base Criteria and Availability feature to prevent resource request being finalized if the availability hours or percentage is set to 0. To enable this feature, contact OpenAir Customer Support.

Users with the **Allow change of booking type on finalized Resource request** role permission can edit the booking type field in resource demand requests even after the resource request was submitted to a resource manager. This feature requires the **Enable a booking type to exist in all approval statuses** account setting. In addition, any bookings created after submission will retain the booking type which was set at the time the bookings were created, even if the booking type is later changed in the Resource Demand Request.

Exporting Resource Demand Request (RDR) Search Results

Resource demand request queue search results can be exported as PDF, CSV, or HTML files.



Export Resource Demand Request Search Results

1. Go to the resource request queue search results which you would like to export.
2. In the search results, click the settings icon. A dialog appears.
3. Click Download search results in the dialog.
4. Click the Click here link next to the file format you would like to export your results as. A dialog appears asking if you would like to open or save the file. You can choose the program to open the file, or download the file to a location of your choice.

Deleting a Resource Request or Resource Request Queue

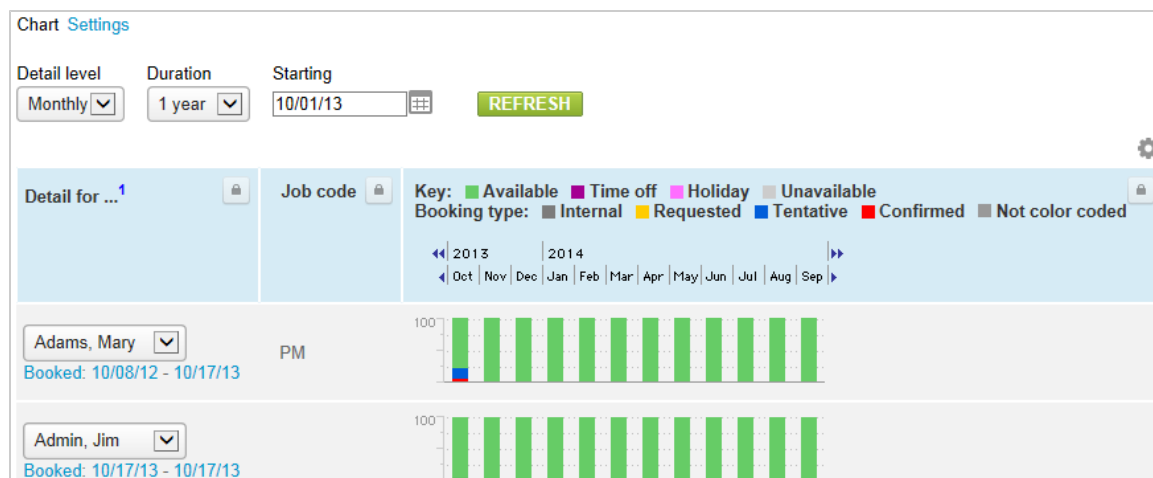
You can delete resource request queues and resources requests with no resource request queues.

Delete a Resource Request or Resource Request Queue

1. Go to Resources > Resource requests or Resources > Resource request queues to open the list view for Resource Requests or Resource Request Queues.
2. Ensure that you have the **Run an action** column displayed on the list. If it isn't displayed, click the settings icon , click **Customize list view**, click **Run an action** from the Available column in the List layout picker, and click **Add selected >**. Then click **OK**.
3. Check the Run an action box next to the resource request or resource request queue which you would like to delete.
4. Click the Run an action icon  at the top of the Run an action column.
5. Select **Delete the selected resource requests** or **Delete the selected resource request queues** and click **OK**.

Note: You cannot delete a resource request that has any resource request queues within it.

Booking Chart



The Booking chart lets you see booking data in a visual chart and is the recommended way to get an overview of bookings for one or more employees. This view can be customized to show booking data according to different attributes. To update a booking from the chart view, click on a day/bar on the chart and the booking is opened up in the List view.

Note: Information about bookings displayed in this view can be added as hover over information. Please contact OpenAir Support for assistance.

Booking Types

Cancel
SAVE
SAVE & CREATE ANOTHER

New

Booking type
Priority
5

Restrict booking editing by role

Any selected roles will NOT be allowed to edit or create bookings with this booking type.

Available

Selected

Administrator
Consultant
Contractor
Controller
Project manager
Resource manager

Add selected >
Add all >

< Remove selected
< Remove all

Approvals

The approval status that corresponds to this booking type.

Open

☐ Default booking type when the approval status changes to this status.

Other

Notes

☒ Active booking type

Booking Types provides you with the ability to group bookings or booking requests into distinct classifications. For example, a Hard booking type may indicate that the contract has been signed and a resource is needed for a specific time frame. While a Soft booking type can indicate that the contract has not been signed and the need is tentative. You can create booking types based on your company's needs and terminology. We recommend that you use booking types that align with a pipeline maturity or project lifecycle since updates are consistent with the state of the project or opportunity. For example, a proposed project with Soft bookings is signed and all bookings should be converted to Hard bookings. This requires a manual update. If you do not have the resources to maintain this data, then you may want to avoid using booking types.

To create a Booking Type:

1. Go to Administration > Application Settings > Resources Settings > Booking types.
2. Select **New Booking type** from the **Create Button**.
3. Enter the Booking type name and priority, if needed. Priority may be displayed on booking reports to identify a level of priority.
4. **Restrict booking editing by role** — To restrict the ability to edit or create bookings of this booking type, select the roles from the Available column and click **Add selected**. Users with the Selected roles will not be able to edit or create bookings of this booking type. Bookings of this booking type will not show in the Advanced Booking Worksheet for these users.
5. Add Notes to describe the use of booking types in your company's OpenAir environment. Booking types can be inactivated or reactivated at any time.
6. Click Save.

Generics

Cancel SAVE SAVE & CREATE ANOTHER

New

Generic name

Week starts on

Monday

Bookings are approved by

Admin, Jim

☒ Active generic

Additional information

Status

Select...

Generic records are virtual or placeholder employee resources that represent a staffing need. Many times, generic resources align with job codes defined in the company since job codes tend to align with skills.

After you have defined generic records, you can use them in bookings or booking requests within the Resources application. A generic record can also be used for booked utilization forecasting or as assigned resources on projects and tasks for assigned utilization. If booking requests have been enabled in your environment, there is a switch that can be enabled to require a requestor to ask for a generic resource instead of a specifically named resource. See [Resources Other Settings](#).

If a project is being planned or has started, the project manager may need to assign a resource to project tasks to develop a full resource plan. Generics may be used if the project manager or requestor knows the type of resource but not the specific individual. Generic resources cannot record time or expenses and can only be used in a forecast capacity.

To create a Generic resource:

1. Go to Administration > Application Settings > Resources Settings > Generics.

2. Select **New Generic** from the **Create Button**.
3. Enter a name for the generic.
4. The drop-down list selection for **Week starts on** defaults to the day designated in [Resources Other Settings](#).
5. In the **Booking are approved by** drop-down list, choose the specific person or approval process (suggested) who can approve booking request assigned to generics. Generics can be inactivated or reactivated at any time.
6. Enter other employee-related information as needed.
7. Click Save.

After you save the Generic form definition, additional links display in a way that is similar to the employee definition process on the Employee Demographic form.

- A schedule link displays to allow association of the generic to a defined work schedule.
- Exceptions to the generics schedule may also be entered, although this is not used often for generics.
- The job code that aligns with the generic may also be defined. Since job codes may change in your company, OpenAir provides a historical tracking feature if the generic should change to be associated with another job code. You can set the previous job code setting to a defined date range and set the new job code as the current value.
- The cost of the Generic may be defined. If the generic aligns with your job codes, the cost would be best set to the average cost of your employees with the same job code.
- If employee entity tags are activated and defined in your account for the employee record, the same tags are available for definition on the Generic record.

Generics are not real employees, and do not have OpenAir log ins. As such, they cannot enter time or expenses and do not allow for Target Utilization, Filter Set, Proxy, or other typical employee configurations.

Resource Profile


Resource Profile Options										
Active	Profile type	Terminology	Do not pluralize	Preserve case	Attribute set	Related Profile	Limit to one per resource	Allow duplicates per resource	Show only in use attributes	Notify employees when new types created
<input checked="" type="checkbox"/>	Skill	Tech skill	<input type="checkbox"/>	<input type="checkbox"/>	Expertise	Select...	[No]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Education	Product knowledge	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Select...	Select...	[No]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Location	Location	<input type="checkbox"/>	<input type="checkbox"/>	Select...	Select...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Jobrole	Job role	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Level	Select...	[No]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Industry	Industry	<input type="checkbox"/>	<input type="checkbox"/>	Expertise	Select...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Resource Profile Options form provides the foundation for relating all Resource Profile elements together to define a complete skill database. Each row controls a dimension of the resource profile.

To access the Resource Profile Options form:

1. Go to Administration > Application Settings > Resources Settings > Resource profiles.
2. For each dimension or row, check the **Active** check box to include the item as a dimension of the resource profile. When active, it displays in the Resources Settings list. You see the standard profile

type names from OpenAir listed here such as Skill, Education, Location, Job role, and Industry. You may override the standard terminology or define a custom term for any of the other 35 custom profile elements.

 **Note:** To create new profile types, go to Administration > Resources Settings and click on the profile type link. See [Tech Skills](#), [Education](#), [Locations](#), [Job Roles](#), and [Industries](#).

3. Profile types become plural on forms by default unless you select the check box: **Do not to pluralize**.
4. OpenAir also converts two word combinations into a capitalized first word and lowercase second word unless you select the following check box: **Preserve case**. The Terminology override displays exactly as you entered it in the Terminology text box.
5. Optionally, you may associate Attribute Sets with individual Resource Profile elements by selecting the desired attribute set. Attribute sets only display if they are defined prior to accessing this form. See [Attribute Sets](#).
6. If Resource Profile dimensions are related, identify the related profile element by selecting it from the Related Profile drop-down list. Related resource elements are only useful in reporting. Each resource profile element by default permits multiple selections by the employees in the category.
7. You may choose to limit a resource profile element to only allow one entry. This is dependent on the definition of the resource profile element. An example would be identifying a highest education level entry by only allowing the employee to select one value. To all duplicates per resource, select the check box: **Limit to one per resource**.
8. By default, OpenAir lets employees select unique values from the available values of a resource profile. You may opt to allow employees to select duplicate values that are differentiated by an attribute set. If you do this, you must select the following check box: **Allow duplicates per resource**.
9. The last 2 checkbox options on the form ensure consistency of data and awareness:
 - **Show only in use attributes** — ensures only active attribute set values display when information is entered in the Resource application.
 - **Notify employees when new types created** — ensures employees are notified of a new Resource Profile value. This could be helpful if you open a new office location or create a new Skill profile.
10. Click Save.

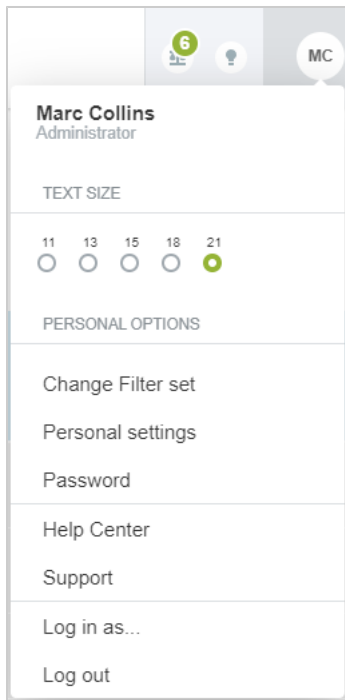
Consolidated Resource Profiles

Use consolidated resource profiles to see what skills and experience your resources have at a glance. It is also easy to update your resources' skills - essential for assigning the right resource to the right task and keeping them engaged, motivated, and increasing revenue.

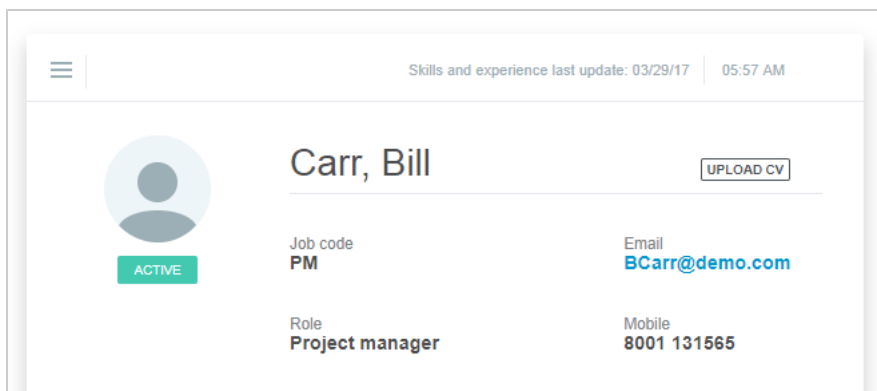
The consolidated resource profile contains a header with customizable information such as the resource's email address, manager, location, or any user custom field arranged in four columns. There is no limit to the number of fields which can be shown in the header.

To open a Consolidated Resource Profile, go to Resources > Resources > [choose a resource] > Profile.


Note: To enable this feature, please contact OpenAir Support and request the Consolidated Resource Profiles feature. Resources with the "View my own profile" role permission can see their information but cannot edit their demographics or custom fields. Resources with the "View and modify my own profile" role permission can also update their skills and experiences, but not the demographics. Users with either role will see a "My profile" link in the User Center which opens the Consolidated Resource Profile.

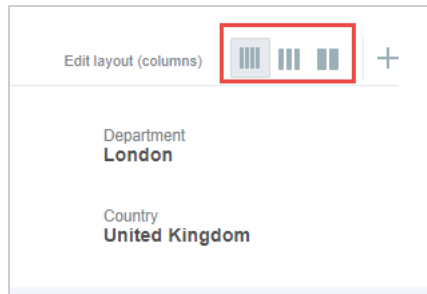



Warning: Users will not be able to see information hidden by a switch or role permission, (for example, "Cost" or "Rate"). These fields will instead display an empty field. Custom fields and their data are always visible. Do not add custom fields to the Resource Profile which should remain hidden from some users.




To edit which fields appear in the header:

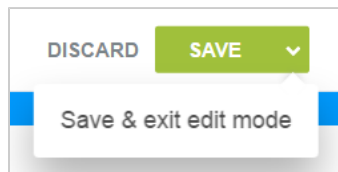
1. Click the menu  icon and click **Edit layout**.
2. Click the Number of Columns icon for how many columns (2, 3, or 4) you would like to use.



3. Click the Add new item  icon. The Add new item menu opens.
4. Click on fields in the "All" list which you want to appear in the header. You can also click "Select All" to add all available fields to the header.
5. Click the X icon next to selected fields to remove them from the header individually. You can also click "Clear All" to remove all fields from the header.
6. Drag fields in the "Selected" list to arrange them in the order you would like.
7. Click **OK**.
8. Click **Save** to save the changes without leaving the Consolidated Resource Profile's edit mode. This is useful if you want to make changes to other parts of the Consolidated Resource Profile.


Click the  icon next to Save and click **Save & exit edit mode** to save your changes and exit the Consolidated Resource Profile's edit mode.

Click **Discard** to exit edit mode without saving any changes.





Note: Users with the "Edit Consolidated Resource Profile layout and settings" role can change the layout of the consolidated resource profile for your company's account. Simply select any resource's profile, edit and save the layout, and it is modified across the whole account.

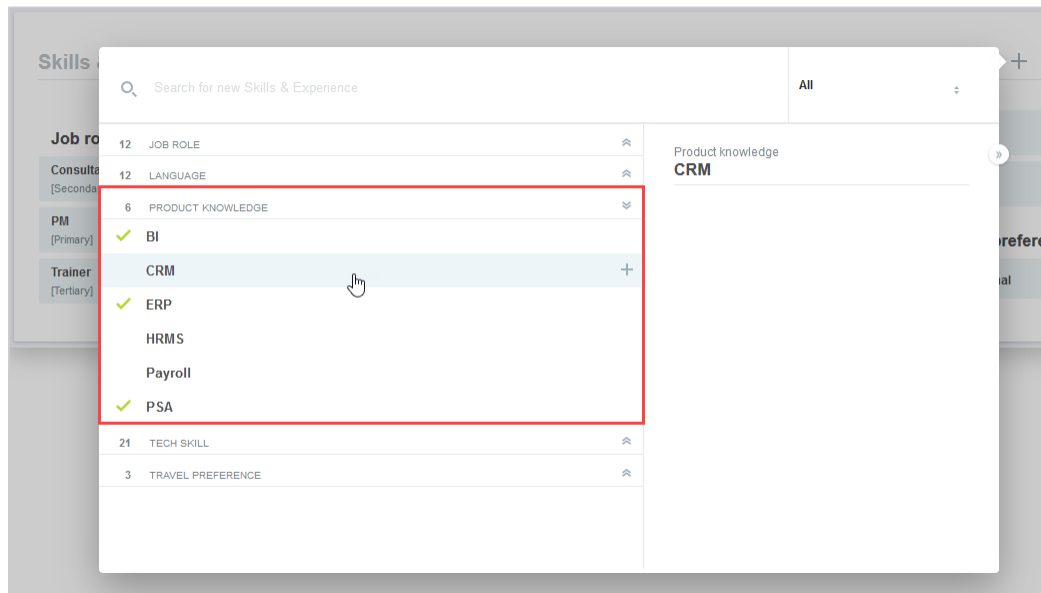
Below the header is a table of the resource's skills and experience. Click each skill to see descriptions of each skill level.

Skills & Experience 			
Education	Job role	Language	MS SQL [Beginner]
BI	Consultant [Secondary]	French [Fluent]	XML [Expert]
ERP	PM [Primary]	Tech skill	Travel preference
PSA	Trainer [Tertiary]	JavaScript [Expert]	International

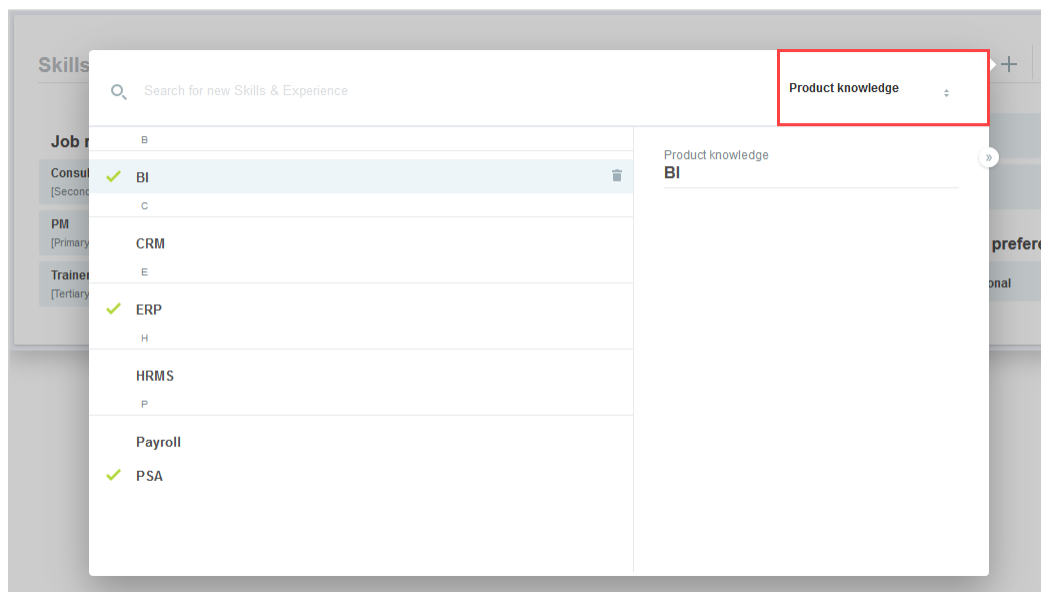
To add skills in the Consolidated Resource Profile:

1. Click the “Edit skills”  icon.
2. Click the “Add Skills”  icon.
3. Click the Skill and Skill Level you would like to add from the list on the left side of the form. The skill will be added to the Consolidated Resource Profile when you click it. You can also search for a skill's name using the “Search for new skills...” field at the top of the form.

Skill levels roll up under categories which you can expand or collapse to see only the skills you want. Each category shows how many skills or skill levels are available for it.



The skills picker also contains a category filter. Use it to select a specific skill category, and the picker only displays skills which are available for that category. You can use the text search field to quickly find desired skills within this filtered list.



Use the icons on the right hand side of the skills picker to hide  or show  the skills description.

The image shows two screenshots of a web form titled "Search for new Skills & Experience". The form has a search bar at the top and a list of skills below. The skills are categorized by level (12, 6) and type (JOB ROLE, LANGUAGE, PRODUCT KNOWLEDGE). In the top screenshot, a skill named "BI" is highlighted in blue, and a "Hide description" button is visible next to it, highlighted by a red box. In the bottom screenshot, the same skill is highlighted, and a "Show description" button is visible next to it, also highlighted by a red box. A mouse cursor is shown clicking the "Show description" button.

Note: You can use the keyboard arrow keys and search form to quickly navigate through the new skills form without needing to use a mouse.

4. Click anywhere outside of the form to close it and return to the Consolidated Resource Profile. The skill or skills which you added will be highlighted in blue.
5. Click **Save** or **Save & Submit** to save the new skills.

Note: If your company has the Skills Approval feature enabled, you can still save skills, however, they will not be permanently saved to your profile until approved by your designated approver.

To edit skills in the Consolidated Resource Profile:


1. Click the "Edit Skills" icon.
2. Click the icon next to the skill you want to edit.
3. Click **Edit**.
4. Click the skill level in the Choose Skill Level header to change the skill level.
5. Enter a note for the skill and level (optional). Notes for skills appear when pointing to the skill in a resource's Consolidated Resource Profile.
6. Click **OK**.

Newly added skills are highlighted in blue. No changes are saved until you click **Save**.

Note: If Skills Approvals are enabled, when you edit a skill, it will be marked as "Pending approval". The resource profile approver can then approve the changes.

To delete skills in the Consolidated Resource Profile:

1. Click the "Edit Skills" icon.
2. Click the icon next to the skill you want to edit.

- Click **Delete** to remove the skill from the Skills & Experience table. If you delete a skill by mistake, click the  icon and click **Revert / Undo**.

Note: If Skills Approvals are enabled, when you delete a skill, it will be marked as “Pending approval”. The resource profile approver can then approve the deletion.

Deleted skills are highlighted in red. No changes are saved until you click **Save**.

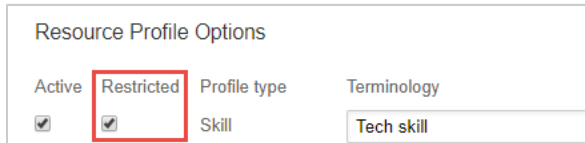
It is also possible to restrict skills which users can see based on their role permissions. To enable this feature, please contact OpenAir Support and request the **Restricted Skills in Consolidated Resource Profile** feature.

When a skill is restricted, only Administrators or users with one of two role permissions can see or edit it. Non-administrators who do not have one of these role permissions will also not see the restricted skills in dropdown lists or selectors. The role permissions are:

- **View restricted profiles** – User can see restricted skills in Consolidated Resource Profile, but cannot edit them
- **View and modify restricted profiles** - User can see and edit restricted skills in Consolidated Resource Profile

To restrict skills by role permission in the Consolidated Resource Profile

- Go to Administration > Application Settings > Resources Settings > Resource Profiles.
- Select the **Restricted** checkbox next to the skill you want to restrict.





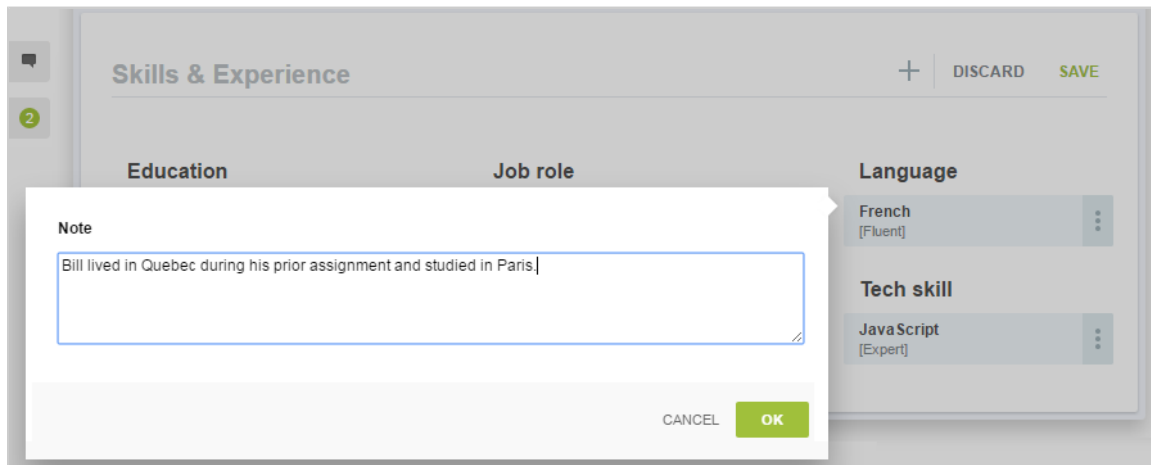
Resource Profile Options

Active ☒ **Restricted** ☐ Profile type Terminology

☒ ☒ Skill

To add resource profile comments to a resource's skills:

- Click the Edit skills  icon.
- Click the  next to the skill you would like to add a comment to and select **Edit note**.
- Add the profile comment in the Note field and click **OK**.
- Click **Save** in the upper right corner of the Skills & Experience table.



Skills & Experience

Education Job role Language

French [Fluent]

Tech skill

JavaScript [Expert]

Note

Bill lived in Quebec during his prior assignment and studied in Paris.

CANCEL OK

The information in Resource Profile notes can be displayed in Advanced Resource Profile Reports.

To show Resource Profile comments in Resource Profile advanced reports:

1. Go to Reports > Advanced > Resources > Resource profiles.
2. In the "Filters and layout options" section of the Resource profiles form, click > **Edit** next to "Report layout".
3. Select the "Comment" field in the "Available" list and click **Add selected >**.
4. Click **OK**.
5. Click **Run the report** to create the populated report now or **Save** to save the report settings and run it later.

When the report is run, the "Comments" column will be added to the report and populated with comments entered in the consolidated resource profile.

Resource profiles				
modify report re-run report				
Resource	Profile	Profile type	Last updated	Comment
Carr, Bill	Consultant	Job role	03/15/17 03:55 PM	
Carr, Bill	French	Language	03/16/17 02:28 PM	Bill lived in Quebec during his prior assignment and studied in Paris.

Customized User Avatars

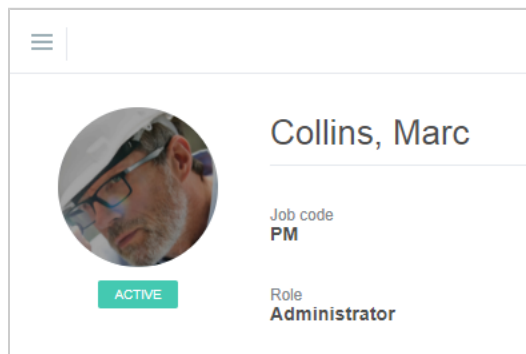
When this feature is enabled, you can upload avatars for users or give them the permission to replace the generic OpenAir resource profile picture in their Resource Profile.

Note: To enable this feature, contact OpenAir Support and request the Customized user avatars feature. The Consolidated resource profiles feature must also be enabled to show custom profile picture on the user interface.

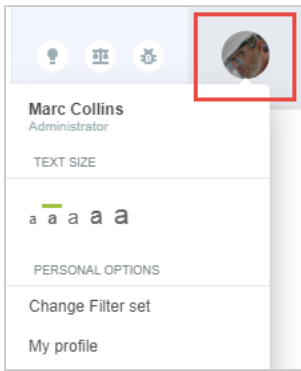
Important: If this feature is disabled, all uploaded avatar images are deleted.

The avatars appear in:

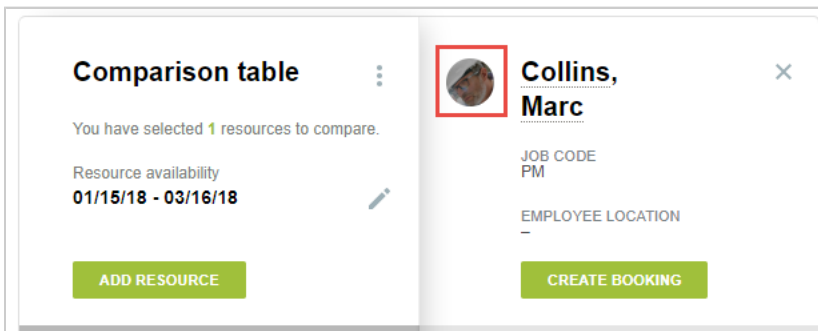
- Consolidated Resource Profile.



- User Center.



- Resource Compare View





The following image formats are supported: BMP, GIF, PNG, and JPG. The image file size cannot be larger than 1 MB. Uploaded avatar images do not count against your account storage.

Two role permissions can be assigned to users:

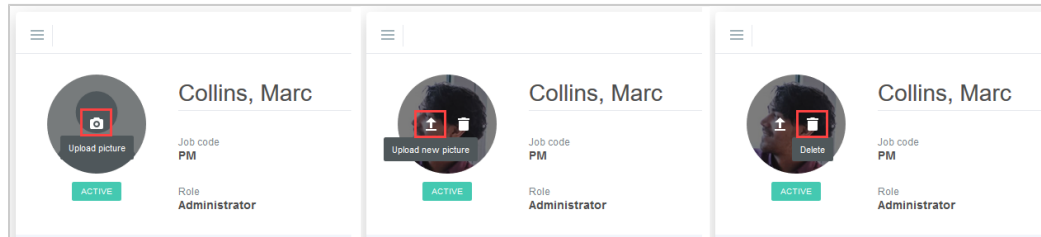
- **Modify own Profile picture** allows users to modify their own profile picture.
- **Modify all Profile pictures** allows a user to modify all pictures for all users they have access to.

Note: You need to have the **Modify Own Profile picture** role permission to upload or change your own profile picture. You need to have the **Modify all Profile pictures** to upload or modify profile picture for any resource you have access to.

To change a profile picture:

1. Go to Resources > Resources > [choose a resource] > Profile to open the Consolidated Resource Profile for the resource whose profile picture you want to add or change. Go to User Center > My Profile if you want to add or change your own profile picture.
2. Hover the mouse cursor over the profile picture and click the camera icon  to add a profile picture, or the upload icon  to replace the existing profile picture. A file selection dialog appears.

Note: You may also use the delete icon  to delete the profile picture.



3. Select an image file and click **Open**. The image file cannot be larger than 1MB and must be one of the supported formats (BMP, GIF, JPG, or PNG). The Upload photo window displays with your selected image file.
4. Select the part of the image you want to use for the profile picture. A preview of the profile picture displays in the right pane. Use the mouse to position the image or click the icons under the picture to position the picture, rotate it, zoom in/out or select a new image file.



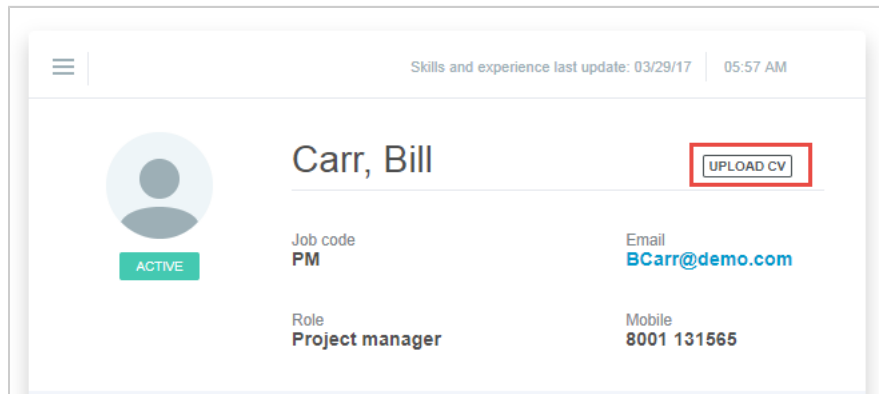
5. Click **Save & Upload**. The Consolidated Resource Profile displays with the new profile picture.

Résumé and Curriculum Vitae (CV) Management in Consolidated Resource Profile

To upload a resource's first résumé or CV to their profile using the Upload CV button:

1. Go to Resources > Resources > [Select a resource's Employee ID].
2. Click **Upload CV**.

3. Select the file to upload.



Once a résumé or CV has been uploaded for a resource, the **Upload CV** button will become the **Download CV** button. To upload a new résumé or CV for a resource who already has one stored, use the **Upload CV** button in the Resource Profile Menu.

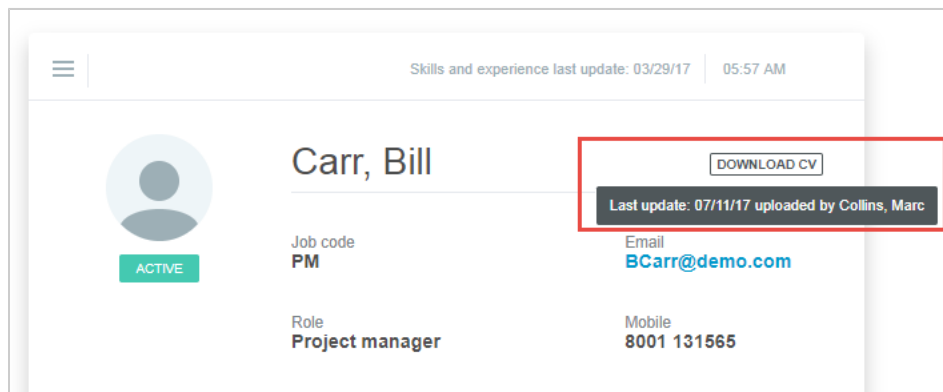
To upload a résumé or CV to a resource's profile using the Resource Profile Menu:


1. Go to Resources > Resources > [Select a resource's Employee ID].
2. Click the **Resource Profile Menu** button and select **Upload CV**.
3. Select the file to upload.

Note: Uploading a new résumé or CV does not overwrite old résumés or CVs. All stored versions are available in the **Manage CVs** button in the Resource Profile Menu.

To download a résumé or CV from a resource's profile using the Download CV button:

1. Go to Resources > Resources > [Select a resource's Employee ID].
2. Click **Download CV**. OpenAir will download the last résumé or CV which was uploaded for this resource.

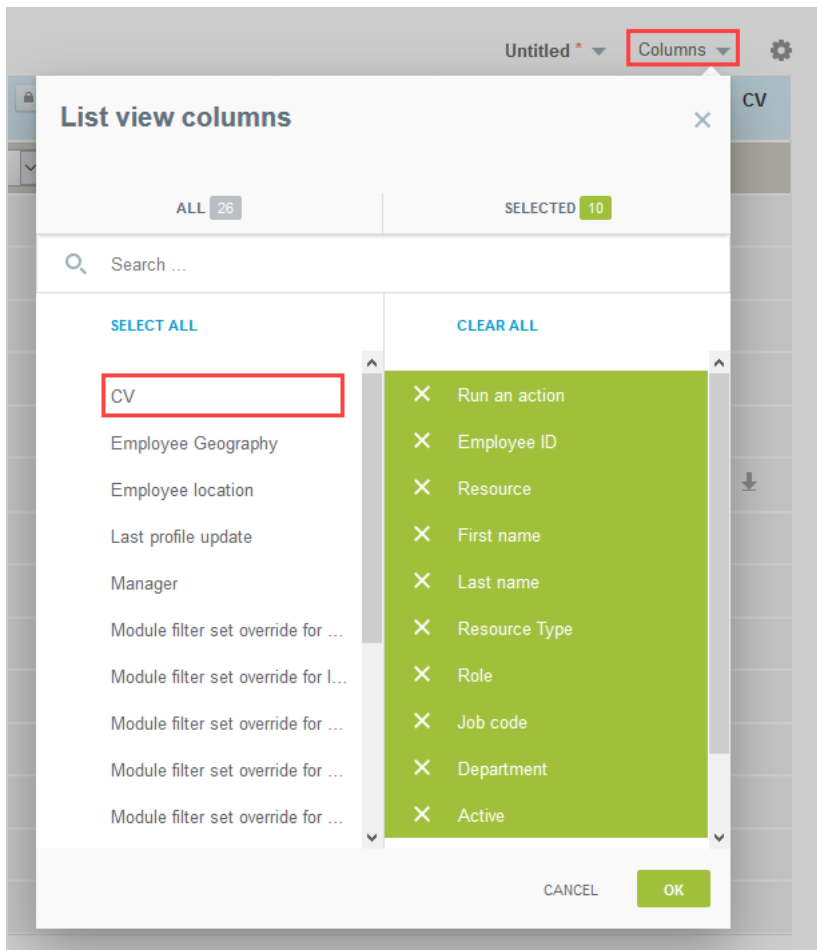


You can also download a résumé or CV by clicking **Download CV** from the resource QuickView or by clicking the download icon  from the resources list view or any other list view containing information about resources.

Action	Employee ID	Resource	First name	Last name	Resource Type	Role	Job code	Department	Active	CV
<input type="checkbox"/>	B	All	All	All	All	All	All	All	All	
<input type="checkbox"/>	B Carr	Bill Carr, Bill								
<input type="checkbox"/>	B Humb	Project manager	Collins, Marc							
<input type="checkbox"/>	Bill Car	Manager	London							
<input type="checkbox"/>	Bill Hur	Department	PM							
<input type="checkbox"/>	BOates	Skills								
<input type="checkbox"/>	Bobbi E	Search in 5 categories and 11 skills								
<input type="checkbox"/>	Brian C	Product knowledge	ERP, PSA, BI							
<input type="checkbox"/>	Brian C	Language	French							
<input type="checkbox"/>	Brian C	Job role	PM, Consultant, Trainer							
<input type="checkbox"/>	Brian C	Action links	Quick navigation							


To add a CV column to any of the list views containing information about resources

1. Go to the list view containing information about resources.
2. Click **Columns** in the list view toolbar.
3. Select **CV** from the list of available columns.
4. Click **OK**.




To download a resource's older résumés or CVs:

1. Go to Resources > Resources > [Select a resource's Employee ID].

2. Click the **Resource Profile Menu**  button and select **Manage CVs**.
3. In the Actions column, click the **Download** link for the résumé or CV you want to download.

Actions	Created	Name	Latest
Delete Download	07/11/17 01:02 PM	Carr_Bill_Resume_2017.pdf	✓
Delete Download	07/11/17 01:02 PM	Carr_Bill_Resume_2016.pdf	
Delete Download	07/11/17 01:01 PM	Carr_Bill_Resume_2015.pdf	
3 rows			

To delete a stored résumé or CV:

1. Go to Resources > Resources > [Select a resource's Employee ID].
2. Click the **Resource Profile Menu**  button and select **Manage CVs**.
3. In the Actions column, click the **Delete** link for the résumé or CV you want to delete.
4. Click **OK** to confirm the deletion.

Actions	Created	Name	Latest
Delete Download	07/11/17 01:02 PM	Carr_Bill_Resume_2017.pdf	✓
Delete Download	07/11/17 01:02 PM	Carr_Bill_Resume_2016.pdf	
Delete Download	07/11/17 01:01 PM	Carr_Bill_Resume_2015.pdf	
3 rows			



Tip: When you point to the Download CV button, a tooltip appears to show when file was last updated.

The **Latest** column in the **Manage CVs** list view contains a check mark for the most recently uploaded résumé or CV.

Actions	Created	Name	Latest
Delete Download	07/11/17 01:02 PM	Carr_Bill_Resume_2017.pdf	✓
Delete Download	07/11/17 01:02 PM	Carr_Bill_Resume_2016.pdf	
Delete Download	07/11/17 01:01 PM	Carr_Bill_Resume_2015.pdf	
3 rows			

Skills Approval

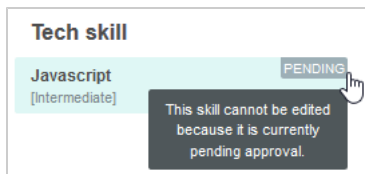
With this feature, you can delegate the responsibility of keeping your resources' profiles up-to-date. The system notifies you when your resources update their skills in the Resource Profile. With your approval, the skills are updated.

Note: To enable this feature, please contact OpenAir Support and request the Skills Approval feature.

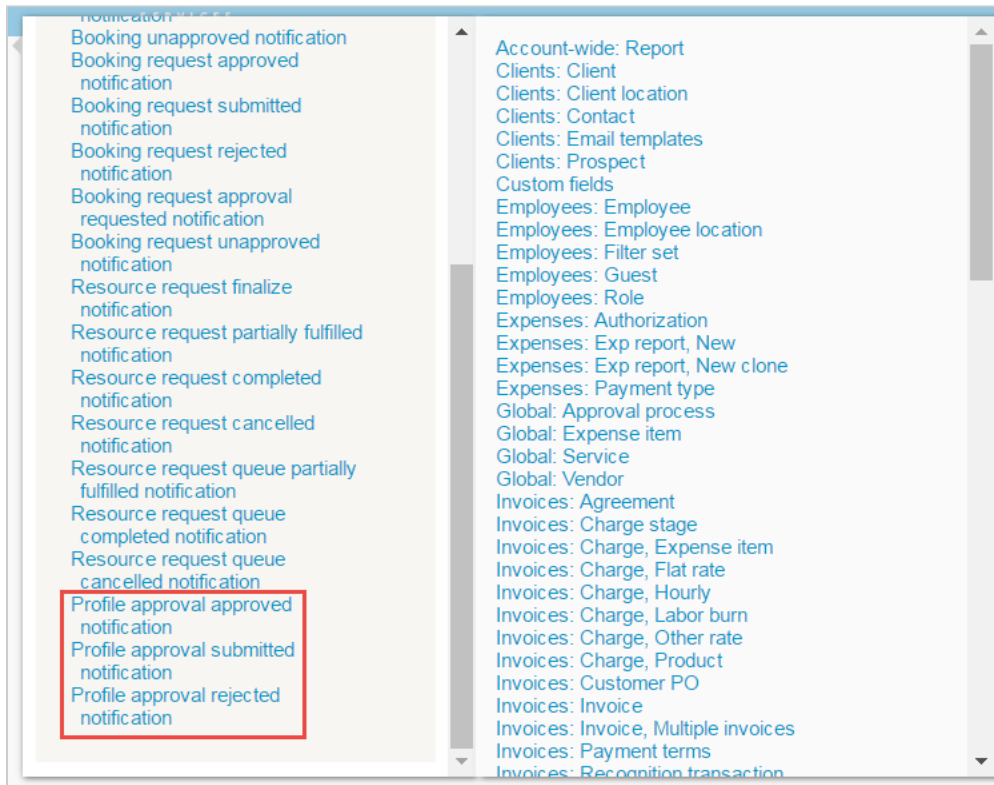
Resources with either of the following role permissions can edit their own skills and experience in their profile:

- View and modify own resource profile
- View and modify profiles

When a resource makes a change to their resource profile and clicks Save & Submit, the change is marked with a "Pending" tag in their profile. Resources can make changes to skills that have been approved or rejected but not to those that have been changed and are still awaiting approval. When resources hover the mouse over a skill that is pending approval, a tooltip is displayed to indicate that the skill cannot be edited.



You will also receive a notification that your resource has made a change to their resource profile. You can set these notifications in Administration > Application Settings > Resources Settings > Notifications. Once set, email notifications will be sent as with other types of approvals when changes are submitted. Reminders will also appear on the Dashboard.



To approve or reject a resource's changes to their resource profile:

1. Go to Resources > Profile approval > [Select "All" or "Submitted"].

2. Click a change to approve. The "View profile approval lines" page appears.
3. Select the changes you want to approve in the "Run an Action" column.
4. To approve selected changes, click the "Run an Action" dropdown list and select the "Approve selected and reject all others" option. To reject selected changes, click the "Run an Action" dropdown list and select the "Reject selected" option.

Note: Be sure to select all changes which you want to approve before clicking the "Approve selected and reject all others" option.

Search - Resources Application

There are two types of searches you can perform in the Resources application. They are either a Quick Search or a Custom search. Each is described as follows.

Quick Search

When you select the Quick link from the Search drop-down list, a text box displays with the list of Resource Profiles you specified in your account: [Tech Skills](#), [Education](#), [Locations](#), [Job Roles](#), and [Industries](#).

Action	Attribute	Employee ID
Book	HTML	Intermediate
Book	HTML	Beginner
Book	HTML	Expert
Book	HTML	Intermediate
Book	HTML	Expert
Book	HTML	Expert

To perform a Quick Search:

1. Go to Resources > Search and select Quick.
2. Select a search item from the drop-down list. The list view refreshes and displays search results.

Custom Search

When you select the Custom link from the Search drop-down list, a Search Criteria form displays and you can identify many different Resource Profile factors to search as well as tag groups and attributes. Remember, you must define profiles and attribute sets and tag groups must be established or they do not display as searchable items.

You can also search on availability that can include a specific time period as well as percentage of time or the number hours a resource is available. Search on experience, resource type, and detail fields. If you save your search and give it a name, it is stored under the Saved Searches link.

Cancel
RESET
SEARCH

Profile Filters

Tech skills filter: [> Edit](#)
Product knowledge filter: [> Edit](#)
Job role filter: [> Edit](#)
Travel preference filter: [> Create](#)
Language filter: [> Create](#)

Availability

☐ Filter based on the following availability...

Period during which availability is required
Start date (MM/DD/YY) End date (MM/DD/YY)

Availability designation
☐ Percentage of time : 0
☒ Number of hours : 0

☐ Allow no intervening bookings when determining availability

Resource hierarchy filter

☐ Filter resources using the following
Hierarchy node filter: [> Create](#)

Resource type

Select type of resources to include in search ☒ Include regular resources
☐ Include generics

Detail Fields

Group [Detail fields](#)
Resource [> Create](#)

Other

☒ Save this search as ...

Description

To create a Custom search:

1. Go to Resources > Search and select Custom.
2. Click the Create links under Profile Filters to create filters for each profile. When you define entity tags and attributes for employees, an asterisk displays next to an item.
3. Select a Employee entity tag effective date.
4. Select Availability criteria including start and end dates and availability designations.
5. Select the check box to **Filter resources using the following** and use the drop-down list to identify a specific filter.
6. Select the check box to **Filter client experience based on** and use the drop-down list to identify a specific filter. You can also add a filter for client experience.
7. Select the type of resources to include in the search such as regular resources, generics, or inactive resources.
8. Create detail fields as needed.

9. To save the search for future use, select the check box to **Save this search as ...** and type a name for the search.
10. Type descriptive notes to help you remember the criteria you have specified in the search.
11. Click Search. Search results display the employees who match the Resource/Profile you searched on.

Booking Request Layout

Cancel
SAVE

Edit

Booking request number prefix
BR-

Starting booking request #
1

Grid style
No grid lines

Date format
none (use default date format)

☐ Include description on booking request

☐ Include signature line on booking request

Notes

Location of notes
☐ Header ☒ Footer
Includes the notes below, the booking request notes

Additional notes (plain text or HTML) to print on booking requests

Columns to display for the booking request

Available
Employee
Start Date
End Date
Client
Project
Booking type
Name
Hours
Percentage
Book by

Add selected >
Add all >

Selected
Start Date
End Date
Client
Name
Description

< Remove selected
< Remove all

Adobe Acrobat PDF settings

Page orientation
☐ Portrait ☒ Landscape

☐ Expand the page width to fit the booking request

Top margin
0

☒ All pages ☐ First page only

Specify a top margin (in PostScript points) if printing on letterhead paper.
72 points = 1 inch = 25.4 mm

If you have enabled the switch for Enable booking requests, the Booking request layout link displays under Resources Settings. See [Resources Other Settings](#).

Use the Booking request layout form to design a form that meets your company's needs and helps employees request resources they need.

To access and modify the Booking request layout:

1. Go to Administration > Application Settings > Resources Settings > Booking request layout.
2. Select the prefix and starting resource request number. "BR-" is the default prefix and starting number defaults to 1.
3. Select the **Grid style** format of the report and **Date format** from the drop-down lists.
4. As required, add additional notes in the header or footer.
5. Choose the particular fields that you would like to display on the booking request.
6. Choose the Adobe Acrobat PDF settings you would like to use in your environment.
7. Click Save.

Notifications

Resources email notifications are highly configurable in NetSuite OpenAir. You can send an email notification when a booking is created, modified, or deleted. You can also send an email notification when a booking request is approved, submitted, rejected, or approval is requested. As with other types of OpenAir notifications, you can send an email notification when specified conditions are met such as a specific booking type or Client : Project. You designate who receives the email notification and compose the actual email notification message.

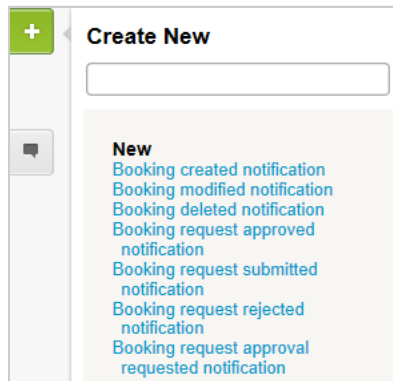
To enable this feature, [Creating a Support Case](#) and request the following switch be enabled: Enable administration of notifications in the following application settings: Resources.

To create resources notifications:

1. Go to Administration > Application Settings > Resources Settings > Notifications.

The screenshot shows the 'Notifications' configuration window in NetSuite OpenAir. At the top, there are 'Cancel' and 'SAVE' buttons. The main section is titled 'Send a notification ...' and has a dropdown menu set to 'When any booking is created'. Below this is the 'Notify' section, which includes two columns: 'Available' and 'Selected'. The 'Available' column lists roles like '[Booked employee]', '[Client owner]', '[Modified by]', '[Project manager]', '[Requester]', and users like 'Adams, Mary', 'Admin, Jim', and 'Carr, Bill'. There are 'Add selected >' and 'Add all >' buttons between the columns. The 'Selected' column is currently empty, with '< Remove selected' and '< Remove all' buttons below it. Below the 'Notify' section is the 'External email addresses' field, followed by a note 'Separate multiple addresses with a comma' and 'For email with multiple recipients:'. There is a dropdown menu set to 'Send each email separately'. The 'Email message' section has a 'Subject' field with 'Booking created' and an 'Email body' field with the text 'The booking "%%name%%" was created'. At the bottom, there is a 'Field' dropdown menu set to 'Select...' and a 'Paste' button. A note at the very bottom says 'Select the field and click "Paste" to use it in the body'.

2. Select the notification type from the **Create Button**.



3. In the Send a notification... section, select either the any booking is created or When these conditions are met.
4. Click + to add a row and as you select options, you can further clarify the notification information such as Booking type and Client : Project.
5. Click + to add a row and if you select the Client : Project option, you can use the Search function to select the actual Client : Project name from the pick list. Indicate whether the condition includes or excludes this Client : Project.
6. Under Notify, specify either individual email addresses or select employees from the Available employee selection box. External email addresses can also be included.
7. Under Message, enter the desired contents of the email to be delivered. Use the Field drop-down list to specify pre-set variables as part of the email. To do this, choose the variable from the drop-down list and click on **Paste** to insert the variable into the email body.
8. Click Save.

Approval Processes

See [Approval Processes](#) under the Timesheets chapter.

Note: You can access the full list of approval processes defined for your account from any of the Expenses, Invoices, Opportunities, Purchases, Resources, and Timesheets application settings. The same approval process may be used for different transaction types across different OpenAir modules.

Alerts

Cancel **SAVE**

Daily utilization alert

Alert name

Alert runs on

Times are in U.S. Eastern Time

Day: Monday at Hour: 12am Minute: 00

Rule

Daily utilization threshold: %

Email notification

Other

You can configure a Daily utilization alert for Resources in OpenAir accounts. The alert runs every day and an email is sent when booked utilization threshold is exceeded.

Alerts allow automated email reminders to be sent to ensure business needs are met. In the Resources application, a form is provided to help you create a Daily utilization alert.

To create a Daily utilization alert:

1. Go to Administration > Application Settings > Resources Settings > Alerts.
2. Select **New Daily utilization alert** from the **Create Button**.
3. Type an Alert name.
4. Under **Alert runs on**, select the day and time when the Alert should run.
5. Under **Rule**, type the Daily utilization threshold percent. Exceeding this threshold generates the alert notification.
6. Use the Email notification section to define who receives the email, the email sender, subject, and email text.
7. Select the check box to **Add information about employees exceeding the utilization threshold**. This provides specific employee information.
8. Type notes, as desired. These notes do not appear anywhere in the alert; they are for informational purposes, such as to remember why the alert was created.
9. Select the **Active alert** check box to make this alert active.
10. Click Save.

Resources Other Settings


The Resources application lets you request, book and track resources (active OpenAir employees) against one or a number of projects in OpenAir. There are a number of settings within the application that control the rights and permissions available to specific Roles. These options are indicated below.

In addition, the Resources application lets you enter particular skills, education, and industries to an employee's profile to create a skills-experience database for your resources that you can search. See [Search - Resources Application](#).

To access the Resources Other settings:


1. Go to Administration > Application Settings > Resources Settings > Other settings.

Notify booked resource when a booking is added, modified, or deleted: When you activate this option, OpenAir creates email notifications and sends them to any resource who has a booking entry created, modified, or deleted for him or her.

 **Note:** Notifications are sent for each booking entry. When using the booking worksheet, entries into each column creates individual booking entries, which causes an email notification to be sent for each booking.

Prepend 'OpenAir' on the subject line of booking notifications emails: The email subject for booking notifications defaults to New Booking Created. Selecting this option prepends OpenAir to the subject line to make it clear to the employee that the email is coming from the OpenAir system. You can customize the booking notification subject and email body per your company's needs.

Notify manager of booked resource when a booking is added, modified, or deleted: If you activate this option, OpenAir creates email notifications to a resource's manager for each booking entry created, modified, and deleted.

 **Note:** Notifications are sent for each booking entry. When using the booking worksheet, entries into each column creates individual booking entries, which causes an email notification to be sent for each booking. If an employee's Demographic form does not have a Manager identified, emails are not generated.

Require booking type when booking resources: If you have implemented booking types, this option lets you make this field mandatory for all bookings created in the system. This requires you to define a complete set of booking types so that a valid value is always able to be selected for any type of booking entry. At least one booking type must be active for the option to be available. If there are no booking types active, then this feature does not have any system impact.

Always 'Book by' for bookings, booking requests, and deal booking requests: By default, the system permits bookings to be entered by hours or by a percentage. Setting this option for strictly a percentage or strictly hours removes the ability to override the booking by the other option (e.g., If set to Percentage, all bookings must be set in percentages and cannot be entered in hours).

Default 'book by' value to use for new bookings when the default value is not otherwise implied: This is a system default setting for how an employee is booked to a project/task, by hours or by percentage. This can be overridden on the booking form or worksheet for each entry.

Default 'book by' value to use for new booking requests when the default value is not otherwise implied: If you have activated the use of booking requests within the resource application, this option sets a system default for how a booking request entry is created, by hours or by percentage. This can be overridden on the booking request form for each entry. If you do not have booking requests enabled, activation of this option does not have any system impact.

Enable client experience in resource searches: The Quick Search and Custom Search tabs within the Resource application by default do not include client experience, which are the past Client : Project worked within the OpenAir system. Activating this option provides client Experience as a search option allowing you to select specific clients in the search criteria.

Note: If you have set up a skill database and created a profile category to capture client experience, this option should not be confused with skill database entries. Client Experience within OpenAir is strictly based on Client : Project association of the employee within the system (i.e., Timesheet entries).

Allow searches for inactive resources: Inactivating a resource removes the resource from various dropdowns and selection fields throughout the OpenAir system. Some forms allow the inclusion of inactive resources within a specific dropdown or selection list. By default, the search functionality within the Resources application does not include inactive resources. By activating this setting, an **Include inactive resources** check box displays on the custom search field, which permits the inclusion of inactive resources in the search. If the Redesigned Advanced Filters feature is also enabled for your account, you can also search and select both active and inactive employees as values in your advanced filter conditions.

Enable resource substitution searching on bookings: Bookings created for employees may need to be changed due to resource conflicts or the replacement of a generic placeholder resource with an available employee. Activating this setting permits a substitution option to appear on booking list views and individual booking forms. How substitution candidates are identified is dependent on the criteria option listed below. The substitution feature saves data entry time should bookings require modification.

Note: If you have email notifications activated for Bookings, the substitution of resources generates an email notification to both the original resource of the booking and the substituted resource of the booking. The only exception is when a generic resource is substituted as they do not have an email address specified in the system.

Criteria to use when searching for a resource to substitute for another a resource on a booking: Searching the criteria for substitution candidates can be one of two types: by Profile or by Job code. The Job code is more of a one-to-one mapping that identifies resources with the same job code as the current resource in the booking. Profile uses the entries from the skills database to look for comparable matching resources. If your skill database is very robust, the search may often times return few or no results. In these instances, the Job code substitution option would be best. The job code is derived from the **Job code** setting identified on the Employee Demographic form.

Enable multiple booking resource substitutions in one action: When enabled, resource managers have the ability to replace multiple resource bookings on the bookings list view by selecting multiple resources and using the **Run an action** function.

Show the related profile name on profile type drop-downs and pickers: When configuring a skills database within OpenAir, a number of dimensions such as Skill, Industry, Location, and Education are defined. Each dimension may be associated with another dimension. When this is enabled, you may optionally choose to display the related profile dimension in the drop-down selection associated with another dimension. For example, you may want to relate a skill with a particular industry. In the drop-down list for the skill dimension, you see ABC Industrializes Skill.

Respect filter sets when generating availability reports

Enable booking requests: Bookings may be created/modified/deleted by employees with granted Role permissions. Depending on your business process, the resource who creates a booking within OpenAir may not know whether a specific resource is needed or what type of resource is required. Enabling Booking requests enables the booking request feature to be available to employees with the appropriate role permissions to submit booking requests (optionally through an approval process) for a particular employee or a generic resource for a particular duration and effort. Approved booking requests automatically create booking entries, either to the specified employee or to the generic resource.



Important: To enable this setting the following internal switches must be disabled: **Enable approvals for bookings** and **Enable project booking automation**. Contact OpenAir Support or your Professional Services Consultant to discuss these options.

Booking requests can only be created for generics: By default when the Booking request feature is activated, any specific or generic resource may be entered on the request. Activating the Generic only feature supports a business process of having only a generic resource available to be chosen on the booking request. The resource reviewer/approver provides the named resource to be booked to the project. This would also require the option to **Edit a submitted booking request** to be enabled. When the generic resource request has been approved, another business process to book a named resource to the project is required. This would replace the generic booking with a named employee.

Booking request approvals are for the requested resource: This option directs how the Booking request is routed for approval. If this selection is enabled, the booking request is sent to the requested resource's approver. If left unchecked, the booking request is forwarded to the approver of the person making the request. To avoid confusion with approval routings, it is suggested that an Approval process is created to direct booking requests to the proper individuals. For more information, see the [Approval Processes](#).

Enable additional required category in resource request queue for absolute requirements: Use the "Required" category in resource requests to include only resources with the skills selected. The "Required" category works as a filter, and when a resource search is performed, only resources with the skills selected in this category will appear in results.



Note: Available when the Resource Demand Request feature is enabled for your account.

The booking type field on booking requests cannot be modified: When a Booking request is initially created, the booking type field can be entered if you have configured Booking types and have at least one active entry. When the Booking request has been submitted, the booking type field cannot be modified if this option is activated.

Copy the approved booking request notes to the automatically generated booking: Notes may be entered on a Booking request. This information may be useful for reference in the Booking after the booking request has been approved. Activating this option permits the notes to be automatically copied to the booking. This is extremely useful to identify the appropriate named resource when generic resources are used on booking requests.

Do not allow booking request submission if time is booked to an inactive option: Employees entering booking requests against Clients : Project (or Clients, and possibly at the Task level) are provided a drop-down lists of these items. This option prevents the submission of a booking request if the employee is able to view a Clients : Project when the booking request is created but later the Clients : Project is inactivated before the booking request is completed and submitted. If this option is unchecked and the Clients : Project is inactivated during the booking request creation and submission process, the booking is allowed against an inactive project since the booking request was already in progress.

Allow an approver to edit a submitted booking request: When booking request approvals are used, booking requests are submitted for review by a defined employees who then approves or rejects the booking request. To avoid time delays introduced by having the reviewer reject a booking request and then the owner changing and resubmitting the request, activating this option gives the reviewer the ability to edit the booking request worksheet entries directly before continuing with an approval. This feature is useful to allow a booking request approver to substitute resources, if necessary, such as when a generic resource is selected in the request and a replacement of an available resource is required. This action is independent of any employee application role settings.

Weekly booking worksheets start on: The first day of the week for the booking worksheet can be set to any specific day of the week or to the first day of the week defined in the user demographics by selecting "From Employee demographics" in the dropdown. Selecting a day of the week for this option identifies

the definition of a week within the system. The OpenAir permits weekly reporting and worksheet displays of weekly time periods. Each of these are dependent on what the specific week start setting that has been selected. This is most obvious in the Reports application under the Advanced tab for Timesheet and Expense status reports. Selecting a number of weeks to display show the defined employee week start values, which may not align with your particular employee week start setting. If this is the case, it may appear as if multiple timesheets have been submitted for a particular week, when in actuality it is just the misalignment of the week start setting throughout the system.

Add booking custom fields to dynamic booking worksheet: The dynamic booking worksheets are available in the Resources application under Booking requests and Bookings. By default, these worksheets do not include custom fields that may have been created for display and entry on the individual booking forms. Activating this feature includes the custom fields on the worksheet as well as the booking forms for proper data entry.

Allow an approver to edit a submitted booking: This option is mutually exclusive with the booking requests feature.

Do not allow booking submission if time is booked to an inactive option: This option is mutually exclusive with the booking requests feature. This option prevents the submission of a booking if any of the following properties are set to a record that is not marked as active: Client, Project, Resource and Booking Type. If an employee attempts to submit a booking associated with an inactive client, project, resource or booking type using the Booking form, the dynamic booking worksheet, the advance booking worksheet, or actions in the Bookings list view, an error message will be displayed and the booking will not be submitted. For example:

- An employee creates a new booking, selects a Client:Project from the dropdown options and saves but does not submit the booking. The client or project associated with this booking is inactivated before the booking is submitted. The employee will not be able to submit the booking and will be prompted to verify the client or project associated with the booking.
- An employee navigates to the Advanced Booking Worksheet and copies an existing row to create a new booking. If the booking is associated with an inactive project or resource, on Save and submit, an error message will appear listing the inactive records preventing bookings from being submitted and the corresponding cells will be highlighted in the Advanced booking worksheet.


Require a task selection on bookings: This option requires specifying a Task when booking a resource to a project. If this is not selected, the task field does not display on the booking form. If tasks do not exist on the project to which the booking is being created, the booking does not save.

Resource planner booking bar format - text options in drop down : This sets the format of the text displayed on the booking bars in the resource booking planner.

Disable daily option in resource planner : This disables the daily utilization option in the resource booking planner, which calculates utilization for each day.

Disable weekly option in resource planner : This disables the weekly utilization option in the resource booking planner, which calculates utilization as the average of all bookings within a particular calendar week.

Disable monthly option in resource planner : This disables the monthly utilization option in the resource booking planner, which calculates utilization as the average of all bookings within a particular calendar month.

 **Note:** To enable the “Resource planner booking bar format” and “Disable daily/weekly/monthly option in resource planner” settings, the following internal switch must be enabled: **Enable resource planner**. Contact OpenAir Support to request this feature.

Preferred landing page for resources: This sets the default landing page for all users opening resources, e.g. Allocations Planner.

Note: Administrators can also set a preferred landing page for individual users in the user demographic settings. Users can set their own preferred landing page from User Center > Personal Settings > Resources Options.

Hide inactive skills on resource profiles: Check this box to hide inactive skills in consolidated resource profiles.

Note: The option to hide inactive skills is available only if the consolidated resource profiles feature is enabled for your OpenAir account.

Frequently Asked Questions (FAQs)

How to add start and end time to bookings?

By default, OpenAir lets you add start and end dates for bookings but not start and end times. To show the start time and end time field on the booking entity form you need to enable work schedule time ranges and configure start times in the employee work schedule.

- To enable work schedule time ranges — Go to Administration > Global Settings > Account > Optional Features , check the **Enable work schedule time ranges** box and Save. See [Optional Features](#).
- Resources must have the relevant start times specified in their work schedule to be available for booking. For more information about configuring start times in work schedules, see [Work Schedules](#).

Edit - 21-Dec-13 to 21-Dec-19 for a total of 22.04 hrs

General
Attachments

Cancel Delete Save & Submit Save

General
Resource
Porter, Marie
Client : Project
Altima Technology : Project Center implementation
Task
20: Client consultation
Period during which to book this resource
Start date (YY-Month-DD) * 21-Dec-13
End date (YY-Month-DD) * 21-Dec-19
Start time 09:00AM
End time 01:00PM
Book by
☐ Percentage of time: 55.1
☒ Number of hours: 22.04
Booking type
Tentative
Requester
Collins, Marc
Notes

If the booking spans more than one day, resources are booked based on the number of hours the resource is available in the day.

The Start and End time fields are available:

- On the booking entity form
- On a list view column and advanced filter
- In Email Templates and Reports

You can show the Start and End time on the booking chart view when users point to a booking. To enable this contact OpenAir Customer Support and request to **customize text to display on hover**.

Employees can also add the Start and End time of bookings on their Calendars in OpenAir (Home > Calendars).

To add booking Start and End time on a calendar:

1. Go to User Center > Personal Settings.
2. Check the **Show work schedule time ranges on the calendar** box under the Display options section.
3. Click Save.

Invoices

Overview

The Invoices application helps capture the time, expenses, and other charges accrued against a project. You can create charges in the Invoices application and include them in an invoice. You can also create charges when you run billing rules in the Projects application.

Primarily focused on invoicing your Clients, the Invoices application manages the results of running the billing rules which have been set up on projects. The charges created can then be placed on an invoice which is mailed or emailed to the client. Manual charges may also be created at any time and thus the need to allow configuration items that may contribute to these charge items are available within the Invoice application (e.g., Expense item, Flat rate, etc.).

Charges - Open												
<div> <div>Open</div> <div>Billed</div> <div>Invoice Ready</div> <div>Write-Off</div> <div>Credit</div> <div>All</div> </div> <div>BULK ACTIONS</div> <div>Untitled</div> <div></div> <div></div> <div></div> <div></div>												
	Date	Invoice #	Description	Client	Project	Task	Employee	Charge type	Charge stage	Value	Hours	Total (money)
<input type="checkbox"/>	All	All	All	All	All	All	All	All	All			
<input type="checkbox"/>	2018-12-12		Initial Setup	ATP Services	AMD Enterprises		Collins, Marc	Flat rate	Invoice Ready	3 600.00 USD	0.00	3 600.00 USD
<input type="checkbox"/>	2018-12-12		No description	ATP Services	AMD Enterprises		Collins, Marc	Flat rate		-250.00 USD	0.00	-250.00 USD
<input type="checkbox"/>	2018-12-12		Discount 100	ATP Services	AMD Enterprises		Collins, Marc	Flat rate		-100.00 USD	0.00	-100.00 USD
<input type="checkbox"/>	2018-12-12		No description	ATP Services	AMD Enterprises		Collins, Marc	Flat rate		1 120.00 USD	0.00	1 120.00 USD
<input type="checkbox"/>	2015-11-26		No description	United Software	Add-on services	Configure integrations	Krause, Franz	Hourly	Invoice Ready	7 hrs 30 min	7.50	927.69 GBP
<input type="checkbox"/>	2015-11-26		No description	United Software	Add-on services	Configure integrations	Fox, Rebecca	Hourly	Invoice Ready	7 hrs 30 min	7.50	881.31 GBP
<input type="checkbox"/>	2015-11-25		No description	United Software	Add-on services	Configure integrations	Fox, Rebecca	Hourly	Invoice Ready	7 hrs 30 min	7.50	881.31 GBP

The Invoices application includes:

Charges — Charges are in different states such as Open, Billed, Invoice Ready, Over Cap, and All. You create charges when you run billing for a project. Under charges, you can either edit charges or create them directly. Options include New hourly, New flat rate, New other rate, and New expense item, Mileage expense item, and New product. You can enter an individual charge to be included in a client invoice or multiple instances of a charge on a scheduled frequency.

Invoices — All charges that are open and invoice ready display under the Invoices link. You can check all or uncheck all or select them individually. Click the button on the bottom right to Create the invoice.

Retainers — When a client provides payment in advance, you create a retainer and apply some or all of the payment against an invoice. When you create a new invoice for this client, the available retainer balance will display.

Agreements

The screenshot shows the 'New Agreement' form. At the top, there are three buttons: 'Cancel', 'SAVE', and 'SAVE & CREATE ANOTHER'. Below these, the form is titled 'New'. It contains several input fields: 'Agreement' (text), 'Client' (dropdown menu with 'Select...' and a search icon), 'Number' (text), 'Date (MM/DD/YY)' (text with a calendar icon, showing '10/27/13'), 'Amount (money)' (text), 'Currency' (dropdown menu with 'USD'), 'Notes' (text area), and a checkbox labeled 'Active agreement' which is checked.

Agreements are contracts or SOWs that are used to track budget balances. Agreements may be associated with a project then assigned to the project billing rules for the tracking of balances. As such, agreements are created for a specific client. An agreement may encompass multiple projects. An agreement can be used in conjunction with Client POs, independent of Client POs, or not at all. Agreements are standard reporting fields and can provide the remaining balance on the agreement and the charges to date. Agreements can be renamed to your company's terminology. See [Interface: Terminology](#).

To create an Agreement:

1. Go to Administration > Application Settings > Invoices Settings > Agreements.
2. Select **New Agreement** from the **Create Button**.
3. Enter the Agreement name and then select the Client from the drop-down list.
4. Enter the client's agreement Number specified on the document (if available) as well as the Date it was created.
5. In the Amount (money) field, enter the total value of the agreement and select the Currency if multi-currency has been enabled.
6. Input any Notes for this agreement, if appropriate.
7. Select the check box for **Active agreement**.
8. Click Save.

Charge Stages

Cancel SAVE SAVE & CREATE ANOTHER

New

Charge stage

Options

Check the options to allow at this charge stage. Individual employees may have further restrictions to these options based on their role.

☐ Display charges in a separate tab

☐ Exclude charges from invoicing

☐ Exclude charges from project analysis

☐ Set this as the primary stage for 'credits'

Deduct charges from Agreement/Customer PO balances for

Select... ▼

Other

Position

After Credit ▼

The position determines the order of the charge stages

Notes

Charge stages separate time and expenses items into different phases or states within the Invoices application. There are two charge stages needed within OpenAir: Open and Billed. You may create any number of charge stages in your environment based on your company's requirements. For example, you may create stages to indicate charges that are billable to the client (e.g., Billable or Chargeable) or not billable (e.g., Administrative, Pending, or Overage.)

To create a Charge stage:

1. Go to Administration > Application Settings > Invoices Settings > Charge Stages.
2. Select **New Charge stage** from the **Create Button**.
3. Enter the Charge stage name.
4. Next, select the Options for this charge stage:
 - **Display charges in a separate tab** — checking this item displays the charge stage as a separate tab under the Invoices > Charges tab, which only displays the items under this stage
 - **Exclude charges from invoicing** — checking this item prevents charges under this stage from being selected in the invoicing process
 - **Exclude charges from project analysis** — choosing this item prevents charges in this stage from appearing under the Analysis link for projects.
5. Enter Position. Use the drop-down list to indicate the order in which the charge stage appears under the Charges tab.
6. Enter any Notes for further description of the charge stage, if desired.
7. Click Save.

Customer POs

Customer POs are funding documents for projects or purchases. Customer POs may be associated with a project then assigned to the project billing rules for the tracking of balances. There may be one or more POs associated with a project. As such, customer POs are created for a specific client. A customer PO may encompass multiple projects. A customer PO can be used in conjunction with Agreements, independent of agreements, or not at all. A customer PO can be set on a billing rule, so that charges are charged against a specific Customer PO. to set a Customer PO on the billing rule, you must first associate it with the project record on the project Properties form.

To create a Customer PO:

1. Go to Administration > Application Settings > Invoices Settings > Customer POs.
2. Select **New Customer PO** from the **Create Button**.
3. Enter the Name of the customer PO and then select the Client from the drop-down list. Enter the client's PO Number specified on the document (if available) as well as the Date it was created.
4. In the Amount (money) field, enter the total value of the client PO and select the Currency if multi-currency has been enabled.
5. Input any Notes for this customer PO, if appropriate. Customer POs are a standard reporting field and can provide the remaining balance on the customer PO and the charges incurred to date.
6. Click Save.

Customer POs can be renamed to your company's terminology. See [Interface: Terminology](#).

Approval Process

The procedure to create approval processes for Invoices is the same as for Expenses. See [Approval Processes](#).

Expense Items

Cancel
SAVE
SAVE & CREATE ANOTHER

New

Expense item
Type of expense item
Regular

Price
Currency
USD
Unit measure
Per diem

Price history

Start Date	End Date	Price

Add rows

Receipt policy

If the receipt total is greater than 0

Require notes on the receipt
Require receipt approval

Limit per diem expense items never

Limit applies to any per diem expense item
All per diem expense items will be considered for this policy

Other

Taxable expense item
Require use of expense item price on receipts
Foreign currency receipts are excluded

Active expense item

Expense Items are receipts, tickets, statements or other items that contain costs incurred by the employee and are entered into NetSuite OpenAir expense reports per your company's policies and procedures.

The expense items are classifications or categories of these costs. Some examples are: Airfare, Lodging, Mileage, Business Meals, etc. OpenAir has pre-defined a number of common expense items, but you can modify these and create new items per your company's needs.

Expenses incurred and related to client projects are often billable to the client. These expenses are available as charges in the Invoices application if expense receipts are processed by an expense billing rule on the project. Then they can be selected for inclusion on an invoice.

Expense charges are only created by the expense billing rule on the project if the Billable receipt check box has been selected on the individual receipts. However, you may override the billable receipt check box control on the Expense Billing rule directly by unchecking the option to Exclude non-billable receipts. (This option is defaulted as checked during the rule creation).

To create a Expense item:

1. Go to Administration > Application Settings > Invoices Settings > Expense items.

2. Select **New Expense item** from the **Create Button**.
3. Enter the Expense item name and select the Type of expense item (regular or mileage). A regular receipt is the default receipt form when a new expense report is created. A mileage receipt is a slightly modified receipt form allowing for mileage rates.



Note: Mileage expense items may also be set as a regular receipt type since the form provides the ability to enter a price per unit (in this case \$\$ per Mile, for example). If you are not using the Vehicle feature that requires the mileage receipt type, you may opt to set up all expense items to the regular receipt type and avoid end-employee confusion during expense entry.

4. Enter a Price for the item (this is generally left blank except for the cases of mileage or per diem), Currency if multi-currency is enabled and the default is not the desired value, a Unit measure (generally for mileage), and indicate whether this is a Per diem item via the check box.
5. The next section in the form relates to Receipt policy, which controls actions based on the individual receipt and expense item entered into an expense report. You are able to enter parameters for the receipt and select whether to require notes or approval based on the settings.
6. For per diem expense items, you are able to choose how to limit their use within the system.
7. Check the Taxable service check box if tax may be charged to the client for this expense item. The tax rate to be used is controlled through the Invoices application by using tax location values. If you would like the expense item price to be required on the receipt, select the check box.

Credit/Rebill


OpenAir's invoicing functionality enables companies to group multiple charges that should be billed and sent to a customer. Invoices can be sent through an approval process, sent to a customer and subsequently exported to an external accounting system. At times it is necessary to credit and potentially re-bill an invoice that has already been approved, sent to a customer, or has been exported. Currently, if an invoice and corresponding charges have been approved or exported, a credit would need to be applied manually creating negative offsetting charges. New charges would also need to be created manually if the invoice needed to be re-billed.

OpenAir has streamlined the process of crediting an invoice and re-billing associated charges after a credit has been issued. A new Credit/Rebill link is available within an approved timesheet that enables users to either credit, or credit and rebill an invoice. If a user chooses to credit an invoice, a new invoice will be created that contains offsetting charges of the original invoice. If the user then chooses to re-bill, the charges from the original invoice will be available to be placed on a new invoice. Both credit and re-bill invoices will go through the same approval process as the original invoice. Additionally, the History link in the original invoice will indicate whether the invoice has been credited or re-billed, with the corresponding invoice numbers.

To enable the credit and re-bill functionality, please contact OpenAir Support.


To Credit an Invoice:

1. Users with the appropriate role privilege navigate to Invoices > Invoices > Approved > [select an approved invoice].
2. Click the "Credit/Rebill" link.
3. Enter any necessary notes and select the option for submission of the credit invoice to either "Yes" or "No."
4. After all options have been configured, click the "Credit" button. A new invoice will be created containing negative offsetting charges.

 **Note:** Credit invoice charges are designed to balance out the entire original invoice, and then new charges to be invoiced (or modified and then invoiced) are created by pressing **Rebill**.

To Re-bill an Invoice:

1. Select the originally approved invoice that has already been credited.
2. From the "Credit/Rebill" link, click on the "Rebill" button. After the "Rebill" button has been selected, the charges on that invoice will appear in the "Open" charge stage.
3. Place these charges on a new invoice, if desired.

 **Important:** An invoice cannot be re-billed unless the invoice has been credited. After an invoice has been credited, a new re-bill option is now available.

After an invoice has been credited, users cannot edit the charge in the original invoice, and the **Charges** link won't be available. After the original invoice has been rebilled, users cannot delete the original invoice and the credit invoice in the UI. Users would need to set the field **credit_rebill_status** to C on the original invoice to be able to delete the credit invoice. This setting of the field can be done using the Integration Manager tool. After the credit invoice is deleted, users may now edit the original invoice.

Edit or Delete an Invoice Where a Credit and Rebill Has Already Been Applied

1. Create a CSV file and add a column for **ID** and **credit_rebill_status**.
2. Indicate the **internal id** of the **original invoice** (not the credit invoice).
3. Indicate **C** under **credit_rebill_status** column.
4. Save it as **CSV**.
5. Open **Integration Manager**.
6. Map **ID** with **ID** and **credit_rebill_status** with **credit_rebill_status** for **CSV to Invoice**.
7. Run the **Integration Manager** tool.

After doing this, the original invoice's **credit_rebill_status** will become C (Credit Initiated) from R (Re-Bill). Moving it to a state that is not re-bill will allow users to delete the credit invoice. Users may do so by navigating to **[credit invoice] > Properties > click Delete**. After deleting the credit invoice, users may now edit the charges within the original invoice and/or delete the original invoice.

Role Settings

There are two new role settings that allow specific roles to either Credit or Re-bill an invoice:

- Rebill invoices
- Credit invoices

Charge Stages

A specific charge stage can be designated at the Administration > Application Settings > Invoices Settings > Charge stages. Within the charge stage edit form, select the option "Set this as the primary stage for 'credits'". If designated, any charge created from the credit invoice will be displayed in this charge stage.

Invoices List View

In the Invoices list view, a new subtab for "Credit/Rebill" is available. This subtab will hold any invoice that has been credited or re-billed. In addition, three new fields can be displayed by clicking on the "Customize list view" link on the upper left corner of the top menu bar. These fields are: "Credit/Rebill - Credit invoice number", "Credit/Rebill - Original invoice number", and "Credit/Rebill - Status". To display these fields, click on them as desired and select "Add selected items." Click OK.

Reporting

Time entry related fields can now be reported on in a charge detail report. These fields can be leveraged to identify the original time entries hours from the resulting charge. To run a charges detail report, navigate to Reports > Detail > Invoices > Charges.

Terminology

The terminology for "Rebill" can be changed. To modify the terminology, navigate to Administration > Global Settings > Display > Terminology.

Invoice Layouts List View

Invoices Settings Invoice layouts ⚙️		
Invoice layout 🔒	Active 🔒	Default layout 🔒
All ▼	All ▼	
Detailed layout	✓	
Standard layout	✓	[X]
Summary layout	✓	
Expense layout	✓	
4 rows		

The Invoice Layout sub-tab lets you create and maintain the various invoice formats you require to produce invoices capturing the information desired based on types of projects or client preferences. You may have multiple invoice layouts and one of those layouts should be selected as your default layout.

The invoice layout is applied when the invoice is created based on the invoice layout setting on the project (Project Properties or Edit Project form). If a layout is not set, the default invoice layout is used. An invoice layout may be changed on a particular invoice by overriding the layout in the Edit Invoice form within the invoice. The layout form is structured into 7 basic parts: Invoice Columns, Invoice Groupings, Combine Charges, Other, Logo Settings, Footer Settings and Adobe Acrobat PDF Setting.

Credit/Rebill Invoice Layout

A distinct invoice layout can be configured and designated as the default for credit invoices. To configure the layout, navigate to Administration > Application Settings > Invoices Settings > Invoice layouts. Within the invoice layout edit form, check the option "Default credit invoice layout".

To access, create and modify the Invoice layout:

1. Go to Administration > Application Settings > Invoices Settings > Invoice layouts.
2. Select **New Invoice layout** from the **Create Button**.

The components of the Invoice Layout form follow.

Invoice layout - Display, summary

Cancel Delete **SAVE**

Edit Detailed layout

Invoice layout
Detailed layout

☒ Active invoice layout

☐ Default invoice layout ☐ Default credit invoice layout

Invoice columns

Available

- Date
- Description/Notes
- Description
- Notes
- Units
- Rate
- Total
- Project
- Task
- Task notes

Selected

- Date
- Employee
- Hours
- Rate
- Task
- Description/Notes
- Expense item
- Units
- Total

Add selected > Add all > < Remove selected < Remove all

Invoice layout for expense items
[None, use this invoice layout]

Optionally, select an alternate invoice layout to use to define the columns to display for expense items

Invoice groupings

Available

- Type
- Project
- Service
- Employee
- Expense item
- Product
- Task
- Phase
- Job code
- Project job code

Selected

- Type

Add selected > < Remove selected

In the top half of the form, you have the options to designate this layout as the default. Only one invoice layout can be considered the default. The display area enables the selection of specific information related to invoice charges and the order those fields are displayed in the invoice, one value per column.

If you have the internal switch active that enables separate layouts for expenses from other invoice charges such as time or flat rates, you are able to select the invoice layout that controls only the expense formatting of your invoice. If the internal switch is not activated by OpenAir, then you do not see this option in your invoice layout.

The Summary section enables a grouping of values to be performed when displaying the information. It is important to remember that the invoice layout and summary selected does not change any of the invoice charge values, the data is simply formatted according to your specifications. Selecting a group or groups of items enables a subtotaling display of information.

Expense items can be grouped together that are similar as can time entries. The way the information is grouped is based on the options by time period such as day or week, by rate such as combine only like rates, and/or by employee. You may select one or more of the combination options to produce the summarized group as expected.

Expense groups may also be created to group expenses together that are related in some way by your company. Select the create arrow to display the expense group form. You may define as many expense groups as you desire, however each group must have at least 2 expense items. Expense items not included in expense groups are not included on the invoice so it is advisable to set up an 'other' group to capture those expense items that are typically not passed to invoices but may occur in special circumstances.

Invoice layout – Formatting override

A series of options exist to format the information displayed such as the location of project notes (if desired to be on the invoice) and invoice notes (if desired to be on the invoice). You may also select a number of other options such as the date format, number and hours formats, sorting order, additional text, etc.

If you have the terminology override on invoice layouts option activated (internal switch by OpenAir), then you have the ability to override the names of all fields that could appear on the invoice including items such as Tax, Total, Hours, etc. If you choose not to enter any values, the default system value is used. If you choose to enter a value, then invoices using the layout will have the fields renamed. This option is very helpful if you need to have invoices in another language or are using fields to display information different than what the field name is called by OpenAir. Example: redefine GST to Mwst Tax for country specific invoices. To activate the terminology override on invoice layouts option, [Creating a Support Case](#).

Two major sorting options are available to control the order in which charges are displayed, Primary charge sort order and Secondary charge sort order. Select the options that sort your invoices properly for each format.



Important: Not all sorting values are available for display on the invoice. This may lead to confusion regarding the sorting of data on the final invoice, so use the sorting options carefully.

Invoice layout — Set the sender address (From)

By default, OpenAir uses the email address of the employee sending the invoice in the From address of the invoice email. For example, if an employee goes to Invoices > [select an invoice] > Send tab and clicks **Send**, the invoice email will show as being sent from this employee's email address.

To override the sender email address for your invoice email, set **"From" email address for invoices** to any email address on the invoice layout. All invoice email with this layout will be sent using the sender address set for the layout.

You can use this together with **Do not set the From: address to the current employee's email address** option in Administration > Global settings > Email settings to use only the sender email address set on the invoice layout for all invoice email. See [Email Settings](#).

Invoice layout — margins, remit to

A remit to field lets you override the company address from which you are sending the invoice. This is helpful if you have more than one office invoicing clients and receiving payments. Since the office address is set in the invoice layout, you need to define invoice layouts per office and make sure they use only their layouts to get the appropriate remit to address displayed. There is no ability to restrict who can see what invoice layouts so training is key.

At the bottom of the invoice layout is a control of the invoice margins, both top and bottom. If you opted to allow the company logo to appear full size, the invoice top margin is ignored should your logo require more space. You have the option to load an override logo which is helpful in the case of invoicing by subsidiaries within your organization that may use unique logos when invoicing your client base. The title of the invoice may also be overridden. This lets you specify a layout that renames the invoice to be 'Credit Memo' for example or any terminology (in any language) you desire.

Invoice Options

High level Invoice options exist that apply globally to all of your invoices. Setting the starting invoice # and the increment by # value should only be set one time in your account and not adjusted to maintain consistent invoice numbering.

To access and modify the Invoice options:

1. Go to Administration > Application Settings > Invoices Settings > Invoice options.
2. Set the Starting invoice # and the number invoices increment by. The starting number defaults to 100 and the incremental invoice # defaults by 1. You may change this as needed in your company. However, when set, we recommend that you do not change it.
3. Select the check box to **Include outstanding balances on the invoice** if you would like to display any outstanding balances to your clients. This is controlled here and not with the invoice layout.
4. Select the check box to **Show future charges when creating an invoice** if you have set up invoice charges for future billing manually and want to include these in the invoice for advanced billing.
5. Select the check box to **Show the employee name on the "Change charges" view** if you allow employees to change the charges by removing or adding them and optionally editing the charge.
6. Select the check box to **Show the task in the "Change charges" view** if you want to display the task in the charges view.
7. Select the check box to **Include PDF by default when sending an invoice** if you want the **Include PDF invoice as attachment** option on the Invoice > Send form to be selected by default. Users will be able to uncheck this option if they do not want to include the invoice as a PDF attachment.

Note: Attached PDF Invoice files are named 'invoice_<invoice number>.pdf'. For example, Invoice number 1358 will be sent with the file 'invoice_1358.pdf' in attachment.

8. Enter an email address in the **Invoice email Bcc** text box if you want to copy a recipient privately into all invoice email using Blind carbon copy. On the Invoice > Send form, the **Invoice email Bcc** is read-only and visible only if filled in the Invoice Options settings.

9. Enter an email address in the **Invoice email Cc** text box if you want to set a default recipient to be included into invoice email using Carbon copy. The **Invoice email Cc** can be overwritten by the user sending the invoice on the Invoice > Send form.
10. Click Save.



Tip: You can set a sender address for your invoice email by using **"From" email address for invoices** on your invoice layouts. See [Invoice layout — Set the sender address \(From\)](#).

Service

Cancel
SAVE
SAVE & CREATE ANOTHER

New Service

Notes

Billing rates

Currency

USD

Hourly rate (money/hr)

Other rate

money/Day

Flat rate (money)

Other

☐ Taxable service
 ☒ Active service

OpenAir provides a number of methods you can use to charge or invoice a client. One of these methods is Services. You use services when you would like to designate and bill for specific services offered to a client.

A Service can be set up to bill at an hourly rate; a set amount per day, or week, or month; or may be set as a flat rate. Services are available in the Timesheets, Projects (tasks, billing rules, and recognition rules), Invoices, and Opportunity applications.



Note: The name of this form is based on your company's terminology. Most companies use services or activities, but other terms are used. You can review and modify your company's terminology definitions in Global Settings. See [Interface: Terminology](#).

One example of a Service would be for monthly application support. You would charge a fixed fee amount per month to the client regardless of the amount of time incurred by resources providing the support. Another example could be programming fees where the service is provided on an as needed basis. You would charge the client at an hourly rate or on a per-day basis when assistance is required.

You are able to select the service as an option in the invoice layout. This defines the specific work provided to the client.

To create a Service:

1. Go to Administration > Application Settings > Invoices Settings > Services.
2. Select **New Service** from the **Create Button**.
3. Enter the Service name. Type notes related to this service.
4. Under Billing rates, select the Currency if you are using multi-currency in your environment. Choose how you would like to charge for this service: Hourly rate, Other rate (specified amount per time period), or Flat rate (for the entire service-fixed fee).

Note: You do not have to complete the billing rates section unless you have chosen to get billing rate from either Services or Services-Client. See [Billing Rates](#).

5. Optionally, you may choose a cost center for the service if your company has enabled using Cost Centers and has chosen Services as a Selected Item. See [Cost Centers](#).
6. You may also enter text to be used on proposals in the Opportunities application, if desired.
7. Select the check box for **Taxable service** if tax may be charged to the clients for this service. The tax rate used is based on [Tax Options](#) as well as [Invoice layout - Display, summary](#).

Frequently Asked Questions (FAQs)

How would I know whether I should have Services set up for my company?

If your company provides standard types of services to clients, you may want to create services in your account. They can be used for providing a standard description of the work being performed and are useful for financial reporting, such as revenue by type of service delivered. Since services are carried onto invoice charges, they are available to display on invoices to identify the type of work completed for your clients. Services are “sticky” values that remain associated with time entries and can be used in billing/recognition rule setup. This can provide a wide variety of reporting options using timesheet hours and billing/revenue monetary values.

Payment Terms

Cancel
SAVE
SAVE & CREATE ANOTHER

New Service

Notes

Billing rates

Currency
USD

Hourly rate (money/hr)

Other rate
money/Day

Flat rate (money)

Other

☐ Taxable service
☒ Active service

Payment Terms are the conditions, generally the timeframe, under which an invoice is expected to be paid by the purchaser of the goods and/or services. Common terms are: Upon Receipt, Net 30 days and Net 45 days. Any number of payment terms may be created per your company's policies. Generally these terms are specified in contracts or master agreements between the provider and the client.

To create Payment terms:

1. Go to Administration > Application Settings > Invoices Settings > Payment terms.
2. Select **New Payment terms** from the **Create Button**.
3. Enter the Payment terms name. There is a standard aging report OpenAir provides. In order for the aging function to work properly, the payment terms must be input in the form of "Net#".
4. Type any Notes, if desired.
5. If this payment term is the standard used for your company, select the Default payment terms check box. You may also specify the payment terms on an individual client basis.
6. Click Save.

After you have created payment terms, you can select them on the Clients form. Go to Clients and select a client. Click the Billing information link. Select the Payment terms from the drop-down list. The payment terms for a client override the default set in the payment terms form. See [Client Billing Information](#).

Other Settings

The Invoices application has many configurable parts including add-on functionality and interaction with how you are managing your projects.

To access the Invoices Other settings:

1. Go to Administration > Application Settings > Invoices Settings > Other settings.

Disable editing of invoiced charges: Charges may be edited within the Invoices application. This ability is controlled by application role settings. By default, a charge that has been included on an open invoice may also be edited directly within the invoice via the **Change charges** link. Activation of this feature disables the ability to edit charges within an invoice. Therefore, to edit charges on an invoice, all charges must be removed from the invoice first, modified, then reapplied to the invoice as appropriate using the **Change charges** link within the invoice.

Disable editing of exported invoices: Charges may be edited within the Invoices application. By default, a charge that is included in an invoice may also be edited directly within the invoice via the **Change charges** link. If you are exporting invoices from OpenAir for upload or integration with an accounting system, an export flag is set for invoices that have been exported. This is how OpenAir tracks what new invoices must be exported each time the export is run. Activation of this feature disables the ability to edit charges on an invoice that has been exported.

To edit charges, the invoice must be unexported and then unapproved (if it has already been approved) to remove the desired charges from the invoice. Charges may be modified and reapplied to the invoice using the **Change charges** link within the invoice. The invoice can now be exported again whenever the next export is scheduled to be run.



Important: If you are interfacing invoices with another system, the invoice in the other system must be deleted if the invoice has been unexported within OpenAir. This is to avoid duplicate invoice creation in the other system when the OpenAir invoices are exported again.

Allow project over-ride of billing/shipping/sold to contact: If this option is not selected, then the identified billing contacts for the client are available to be set on the invoice itself. With this option

checked, a field displays on the project form allowing a specific billing contact to be associated with the project. This option is useful if you are creating separate invoices per project.

One project per invoice: If this option is not selected, then invoices can be created at the client level and include billing charges for multiple projects. When using the Create multiple invoices option in the Invoices application, you still have the option to check invoice creation by project or employee. If this option is selected, the system defaults to by project invoice creation for individual invoices as well as multiple invoice creation. You may still chose to create invoices by employee in the multiple invoice create option, but if the one project per invoice option is enabled, then the invoices are created per employee, per project.

Enable shipping contacts: By default, contacts created in OpenAir can be associated with an employee as a general contact or identified as a billing contact. Enabling a shipping contact provides an associated field on the Create contact form to identify whether the contact can be used as a shipping contact.

Require a description on charges: When creating an invoice charge within the Invoices application, the description field is left blank by default. This option requires some type of entry into the description field, most likely due to the invoice layouts displaying the description field. If you create charges from Billing Rules on projects, the charge description can be set via the billing rule to ensure the value is always populated. Setting this option does not make the charge description field on billing rules a required field. Therefore, you still need to ensure the charge description field is entered properly.

Require a service on charges: When creating an invoice charge within the Invoices application, the Service field by default is left blank. This option requires a selection of a service value. Services may drive an integration with an accounting package within your environment, which makes setting the service field critical.

Other reasons why a service would be required include a display of the service on invoice layouts or the use of the service to capture project-related metrics and categories for reporting. If you are creating charges from billing rules on projects, the service drop-down list can be set in the billing rule to ensure the value is always populated. Enabling **Require a service on charges** does not make the service field on billing rules a required field. This is a separate setting within the project options area that is recommended should you decide to activate the service on charges is required option for invoices.

Sort numerically when sorting the invoice list by invoice number: Invoices are assigned a number using the Invoice options form under Invoices Settings. Each client, however, may have a specific invoice prefix and it could be alphabetic. Activating the sort numerically setting ignores the invoice prefix values and displays invoices in the order of the number assignment when you click on the Invoice # column header.

Invoices tab defaults to a list of: Sets the default landing page for the Invoices application to the Invoice tab rather than Charges tab.

Frequently Asked Questions (FAQs)

[I have entered charges for future billing manually but cannot create an invoice and include these charges.](#)

The charges dates may be in the future and the Invoice options do not allow to include future charges when creating an invoice.

By default, if you entered charges manually, you can create an invoice and include open charges as long as the dates set for these charges are not in the future.

If you want users to create invoices for advanced billing and include charges with dates in the future, you need to select **Show future charges when creating an invoice** in the Invoices options. If this option is

not enabled, users will need to wait until the date indicated on an open charge to create an invoice and include this charge. See [Invoice Options](#).

Note: Purchase items from purchase orders are associated to projects at the project level or the task level. They appear in the project budget under Purchases. Purchase items billing rules can be used to create charges and project billing transactions based on the purchase items. These charges can then be included when creating invoices. See [Billing](#) under [Projects](#).

The Purchases application is designed to facilitate the process flow from purchase requests to fulfillment and receipt. It does not support management of vendor records, bills, payments, records or credits. An external accounting system or the OpenAir/NetSuite integration may be used for this functionality.

Accounts Payable Locations

The screenshot shows a web form for creating a new accounts payable location. At the top, there are three buttons: 'Cancel', 'SAVE', and 'SAVE & CREATE ANOTHER'. Below these is a 'New' section with a text input for 'Accounts payable location' and a checkbox labeled 'Active Accounts payable location'. The form is divided into two main sections: 'Demographic Information' and 'Invoicing Address'. The 'Demographic Information' section includes fields for 'Web address' (with an example 'http://www.openair.com'), 'Email', 'Phone', and 'Fax'. The 'Invoicing Address' section includes fields for 'Attention:', 'Address', 'City', 'State/Province', 'ZIP/Postal code', and 'Country'. At the bottom, there is a 'Notes' section with a text area.

Accounts payable locations are for your company's billing addresses. Your company may have multiple accounts payable addresses, which can be each location, a regional office, or a shared services facility. Accounts payable locations are only available in the Purchases application. When created, you can choose the appropriate accounts payable location when creating a PO so that the vendor is aware of the correct billing address when invoicing for this purchase.

To create an Accounts payable location:

1. Go to Administration > Application Settings > Purchases Settings > Accounts payable locations.
2. Select **New Accounts payable location** from the **Create Button**.
3. Enter the Accounts payable location name (required), the Demographic and Invoicing Address information (most critical).

4. Add Notes to include specific data regarding this location such as products and vendors to be used with this location.
5. Click Save.

Carriers

Cancel SAVE SAVE & CREATE ANOTHER

New

Carrier

☒ Active carrier

Notes

Carriers are the organizations that transport the purchases you order from your vendors to your company locations. You may want to specify the carrier you would like your vendor to use when shipping your purchases. The preferred carrier can be entered when creating POs. Frequently, you may have special arrangements with certain carriers. The use of carriers is only available in the Purchases application.

To create a Carrier:

1. Go to Administration > Application Settings > Purchases Settings > Carriers.
2. Select **New Carrier** from the **Create Button**.
3. Enter the Carrier name and any relevant Notes regarding this carrier such as contact information and account number.
4. Click Save.

F.O.B Locations

Cancel SAVE SAVE & CREATE ANOTHER

New

F.O.B. location

Notes

☒ Active F.O.B. location

F.O.B. means Freight On Board. F.O.B. locations are an indication of which party, purchaser or vendor, is responsible for the shipping and loading costs. It may also refer to where the liability for damage goods resides.

In North America, the locations generally used are FOB Origin or FOB Destination.

F.O.B. Origin — means the purchaser pays for the shipping costs and takes responsibility (liability) for the purchase when it leaves the vendor's location.

F.O.B. Destination — is the opposite, where the vendor is responsible for costs and liability until the purchase reaches the purchaser's facility.

You may also create F.O.B. locations with specific locations (e.g., F.O.B. London) or other conditions based on your company's needs. Ensure there is a clear definition on what each entry represents by entering notes as you set up the F.O.B. Location.

To create a F.O.B. location:

1. Go to Administration > Application Settings > Purchases Settings > F.O.B. locations.
2. Select **New F.O.B. location** from the **Create Button**.
3. Enter the F.O.B. location name and any Notes, if desired.
4. Click Save.

Manufacturers

Cancel
SAVE
SAVE & CREATE ANOTHER

New

Manufacturer ☒ Active manufacturer

⌵ Demographic Information

Web address
e.g. <http://www.openair.com>

Email

Phone Fax

⌵ Mailing Address

Address

City State/Province ZIP/Postal code Country

Notes

Establish manufacturers so that you can associate them with products to ensure the products are purchased from the manufacturers your company selects. An example would be the purchase of a cell phone from AT&T or Verizon. By indicating the manufacturer on the purchase order (PO) or the purchase request, you ensure the cell phone is purchased from AT&T or Verizon.

Manufacturers is a feature that is only available in the Purchases application, however, it is not a required record in the Purchases application.

To create a Manufacturer:

1. Go to Administration > Application Settings > Purchases Settings > Manufacturers.
2. Select **New Manufacturer** from the **Create Button**.
3. Enter the Manufacturer name and the Demographic Information.
4. The next section is for the Mailing Address and Notes. The demographic, mailing address information and notes are not required to use the manufacturers feature.
5. Click Save.

Purchase Order Layout

Cancel
SAVE

Edit

PO number prefix

Starting PO #

Grid style

PO-

1

Thin grid lines

Date format

Project information on PO

none (use default date format)

none

☒ Include description on PO
☒ Include signature line on PO

"From" email address for POs

Notes

Columns to display for each purchase item on the PO

Available

Item
Qty
Description
Description / Notes
Vendor quote number
Vendor SKU
Manufacturer
Manufacturer Part
Price
Units

Selected

Item
Description
Vendor SKU
Manufacturer
Qty
Price
Units
Total

Add selected >

< Remove selected

Add all >

< Remove all

Adobe Acrobat PDF settings

You can tailor the Purchase orders to meet your company's needs. Since this report may be emailed or mailed to vendors outside of NetSuite OpenAir, the Purchase order layout should clearly communicate your purchasing requirements. You are able to select the prefix and starting PO number, Grid style, and Date format. These settings determine the numbering of the created POs and the basic style of the PO report.

To access and modify the Purchase order layout:

1. Go to Administration > Application Settings > Purchases Settings > Purchase order layout.
2. You may choose to include project information such as the Project name or the Client : Project, if desired, by selecting from the drop-down list.
3. Select the check box to **Include description on PO** and the check box to **Include description on PO** if desired.
4. Type information in the **"From" email address for POs** if you would like that added.
5. A Notes field is available to be displayed on the PO and may be positioned in the header or footer of the form. The notes displayed are a combination of notes entered directly on the PO and static text that may be entered into the Additional notes field in the PO layout. An example of static text may be: All inquiries should be directed to the Accounts Payable Department at xxx-xxx-xxxx.
6. Select the **Columns to display for each purchase item on the PO** from the Available Columns and move them to the Selected Columns.
7. Choose the Adobe Acrobat PDF settings you would like to use in your environment. We recommend that you test a printout of a sample PO when the PDF settings are in place to ensure the page layout and margins are set correctly.
8. Click Save.

Products

The screenshot shows the 'New Product' form in the NetSuite OpenAir interface. At the top, there are three buttons: 'Cancel', 'SAVE', and 'SAVE & CREATE ANOTHER'. The form is divided into several sections:

- Product Information:** Includes a text field for 'Product', a dropdown for 'Manufacturer' (with 'Select...' as the current selection), a text field for 'Manufacturer's part number', a dropdown for 'Preferred vendor' (with 'Select...' as the current selection), and a text field for 'Preferred vendor's SKU'.
- Price and Unit Information:** Includes a text field for 'Standard price' (with '0' as the current value), a dropdown for 'Currency' (with 'USD' as the current selection), and a dropdown for 'Unit measure' (with 'each' as the current selection).
- Product Status:** Includes two checkboxes: 'Taxable product' (unchecked) and 'Active product' (checked).
- Notes:** A large text area at the bottom for entering notes.

Products are items you purchase from vendors. A product must exist to use the Purchase request or PO functionality within the Purchases application. Products may also be rebilled or invoiced to your client and therefore need to be available as a type of billing rule on projects and also as a revenue recognition rule in the Projects application. They also may be used as a invoice charges in the Invoices application.

When you set up products in OpenAir, consider your company's requirements to distinguish between specific products. You may choose to set up generic products like cell phones, travel, or computer. Or, you may choose to be more specific on the type of products you allow to be purchased for your company such as Blackberry 8830 or Dell Inspiron E1705. To allow more flexibility and less maintenance, setting up products that are more generic enables accurate data capture while not restricting the company from evolving as new products are approved and old products are retired.

If you are using the Purchases application to also procure vendor services, you also need to set up products related to services provided such as Consulting, Programming, and Web Design.

To set up a Product:

1. Go to Administration > Application Settings > Purchases Settings > Products.
2. Select **New Product** from the **Create Button**.
3. Enter the Product name. You can choose a Manufacturer from the drop-down list and identify the Manufacture's part number in the fields provided.
4. Choose the Preferred vendor (if available), the Preferred vendor's SKU number, Standard price, Currency if using multi-currency, and Unit measure.
5. Select the check box if this is a **Taxable product**.
6. Select the check box to indicate this is an **Active product**.
7. Add any Notes on this product, if desired. Click Save.



Note: Only the name is required to create a product. Any other fields entered on the product record auto-populate related fields on a purchase request and/or purchase order in the Purchases application.

Approval Processes

See [Approval Processes](#) under the Timesheets chapter.

Note: You can access the full list of approval processes defined for your account from any of the Expenses, Invoices, Opportunities, Purchases, Resources, and Timesheets application settings. The same approval process may be used for different transaction types across different OpenAir modules.

Purchase request layout

The screenshot shows the 'Purchase request layout' configuration interface. At the top, there are 'Cancel' and 'SAVE' buttons. The 'Edit' section contains the following fields and options:

- Purchase request number prefix:** A text input field containing 'PR-'.
- Starting purchase request #:** A numeric input field containing '1'.
- Grid style:** A dropdown menu set to 'Thin grid lines'.
- Date format:** A dropdown menu set to 'none (use default date format)'.
- Include client:project information on purchase request:** A checked checkbox.
- Include description on purchase request:** A checked checkbox.
- Include signature line on purchase request:** A checked checkbox.
- Show the approval history:** A checked checkbox.
- Purchase request header custom fields:** A link labeled '> Create'.

Below the 'Edit' section is a 'Notes' section with a collapse icon. The 'Columns to display for each request item on the purchase request' section features two lists:

- Available:** A list of fields including Item, Qty, Description, Description / Notes, Vendor, Vendor SKU, Vendor quote number, Manufacturer, Manufacturer Part, and Price.
- Selected:** A list of fields including Item, Description, Vendor, Vendor SKU, Manufacturer, Qty, Price, Units, and Total.

Between the lists are controls: 'Add selected >' and 'Add all >' below the Available list; and '< Remove selected' and '< Remove all' below the Selected list. At the bottom is an 'Adobe Acrobat PDF settings' section with a collapse icon.

You can use the Purchase Request layout form to design purchase requests that are specific to your company's needs. Since this report form may be routed for review and approval internally, the layout should clearly communicate your purchasing needs. You are able to select the prefix and starting Purchase Request number, Grid style, and Date format. These settings determine the numbering sequence of created Purchase requests and the basic style of the report.

To access and modify the Purchase request layout:

1. Go to Administration > Application Settings > Purchases Settings > Purchase request layout.
2. A series of data inclusion options are available:
 - Include client:project information on purchase request
 - Include description on purchase request
 - Include signature line on purchase request
 - Show the approval history
3. The Header or Footer of the Purchase Request may display purchase request notes and the client purchase request notes. You can also add additional notes.

4. Select Columns to display for each request item on the purchase request. Move items from the Available list and move them to the Selected list.
5. Choose the Adobe Acrobat PDF settings you would like to use in your environment. We recommend that you test a printout of a sample Purchase Request when the PDF settings are in place to ensure the page layout and margins are set correctly.
6. Click Save.

Purchasers

The screenshot shows a 'New' form for creating a purchaser. At the top, there are three buttons: 'Cancel', 'SAVE', and 'SAVE & CREATE ANOTHER'. Below these, the form is divided into several sections. The first section, labeled 'New', contains a dropdown for 'Associated Employee', a search icon, a text field for 'Purchaser', a checked checkbox for 'Active purchaser', a dropdown for 'Default Accounts payable location', and a dropdown for 'Default Receiving location'. The second section, labeled 'Shipping information', contains a checkbox for 'Default for 'Only ship complete order'' and a dropdown for 'Default for 'Ship via''. The final section is 'Notes', which is a large text area.

You must set up a Purchaser record to be able to use the Purchases application to create POs. The purchaser record stores the default purchasing preferences of each employee. For example, an employee who is in charge of creating POs and delivering them to vendors for a particular office often uses the same accounts payable and receiving information on each PO. By creating the purchaser and associating it with an employee, you set the purchasing preferences beforehand so the employees do not have to enter this information each time they create a PO.

A employee cannot create POs or POs by vendor unless the employee has an associated Purchaser record. Depending on role permissions, an employee can create Short Order POs without being designated as a Purchaser.

To create a Purchaser:

1. Go to Administration > Application Settings > Purchases Settings > Purchasers.
2. Select **New Purchaser** from the **Create Button**.
3. Select the Associated employee from the drop-down list of account employees.
4. Enter a name for the Purchaser.
5. Choose the **Default Accounts payable location** and the **Default Receiving location** for this employee from the drop-down lists.

6. Complete shipping information. Select the check box for **Default for 'Only ship complete order'**. Otherwise, you allow for multiple shipments.
7. If you would like to select a default carrier for this purchaser, select a carrier from the **Default for 'Ship via'** from the drop-down list.
8. Notes may be added, if desired.
9. Click Save.

Vendors

Cancel
SAVE
SAVE & CREATE ANOTHER

New

Vendor name ☒ Active vendor

Demographic Information

Web address
e.g. <http://www.openair.com>

Email

Phone Fax

Purchasing Address

Attention: Address

City State/Province ZIP/Postal code Country

Purchasing Information

Payment terms Currency

Federal tax rate % State tax rate %

PO note (displayed on every PO)

Email PO text (displayed on every email announcing POs)


Notes

Vendors play an important role for companies that use the Purchases application in OpenAir. A vendor is someone from which you purchase services or products. Purchase orders (POs) are issued to vendors and sent via OpenAir provided the necessary information has been entered on the vendor record.

Vendors are an optional feature in the Expenses application and can be entered on receipts, if your system is configured to use vendors on receipts. The entry of Vendors is separate from clients. So if you provide services to a company but also purchase services/products from them, then you must create both a client and a vendor record. See [Clients](#).

To create a Vendor:

1. Go to Administration > Application Settings > Purchases Settings > Vendors.
2. Select **New Vendor** from the **Create Button**.
3. Enter the Vendor name and select the check box to indicate this is an **Active vendor**.
4. Enter Demographic Information as completely as possible.
5. Under the Purchasing Address, enter the full address of the vendor and person/department to be notified. This information is necessary when sending POs that have been created in the Purchases application to the vendor.
6. Enter the additional Purchasing Information. This includes Payment terms (see [Payment Terms](#) under Invoices Settings), Currency if using multi-currency, a PO note that is displayed on every PO for this vendor, Email PO text to be used on POs sent by email, and any notes if required.

 **Note:** The purchasing address and other information are optional if you are not using the Purchases application.

7. Click Save.

Receiving Locations

Cancel
SAVE
SAVE & CREATE ANOTHER

New
Receiving location
☐ Active Receiving location

Demographic Information
Web address
e.g. <http://www.openair.com>
Email
Phone
Fax

Receiving Address
Attention:
Address
City
State/Province
ZIP/Postal code
Country
Notes

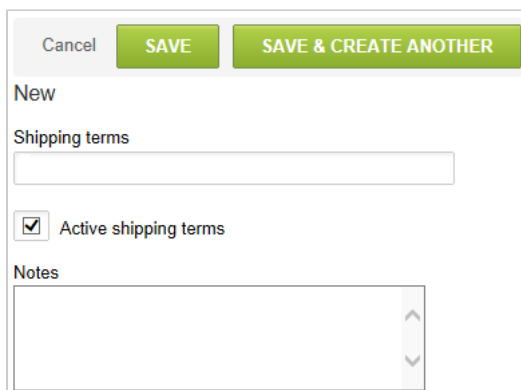
Receiving locations are for your company's shipping addresses. Your company may have multiple addresses it ships to, which could be each location/plant, a regional distribution center, or possibly a third party facility such as a manufacturing plant receiving parts.

Receiving locations are distinct from accounts payable locations since the purchase may be shipped to a plant location while the invoice should be sent to the regional office for accounts payable processing. Receiving locations are only available in the Purchases application. When created, you can choose the appropriate receiving location when creating the PO so that the vendor can ship the purchase to the correct shipping address.

To create a Receiving location:

1. Go to Administration > Application Settings > Purchases Settings > Receiving locations.
2. Select **New Receiving location** from the **Create Button**.
3. Enter the Receiving location name (required), the Demographic Information and Receiving Address information (most critical).
4. Add Notes, if desired.
5. Click Save.

Shipping Terms



You can enter shipping terms on a PO to provide information for your purchases with a vendor. Shipping terms are only available in the Purchases application and are generally determined by the contract between your company and the vendor. Shipping terms could include who is responsible for expenses involved in shipment, who owns goods at a particular point, and who is responsible for paying damage to goods. Examples are Paid by Vendor and Collect on Delivery or C.O.D.

To set up Shipping terms:

1. Go to Administration > Application Settings > Purchases Settings > Shipping terms.
2. Select **New Shipping terms** from the **Create Button**.
3. Enter the Shipping terms name. This displays on the PO.
4. Type any additional information in Notes.
5. Click Save.

Notifications

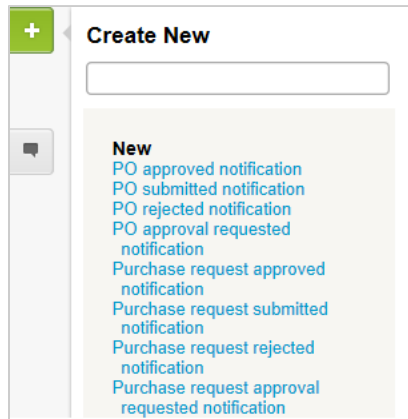
The screenshot shows the 'Notifications' configuration window in NetSuite OpenAir. At the top are 'Cancel' and 'SAVE' buttons. Below is a dropdown menu 'Send a notification ...' with the selected option 'When any PO is approved'. The 'Notify' section contains two lists: 'Available' and 'Selected'. The 'Available' list includes roles like '[Approver's department head]', '[Approver's manager's manager]', '[Approver's manager]', '[Approver]', '[Co-Approver]', '[Submitter's department head]', '[Submitter's manager's manager]', and '[Submitter's manager]'. Between the lists are buttons: 'Add selected >', 'Add all >', '< Remove selected', and '< Remove all'. Below these is a text field for 'External email addresses' with a note 'Separate multiple addresses with a comma' and a dropdown 'Send each email separately' set to 'Send each email separately'. The 'Email message' section has a 'Subject' field with 'PO approved' and an 'Email body' text area with the template 'The PO "%name%", approved by %approved_by%, is approved'. At the bottom is a 'Field' dropdown set to 'Select...' and a 'Paste' button, with a note 'Select the field and click "Paste" to use it in the body'.

Purchases email notifications are highly configurable in NetSuite OpenAir. You can send an email notification when a PO is approved, submitted, rejected, or when an approval is requested as well as when a purchase request is approved, submitted, rejected, or when an approval is requested. You can send an email notification involving a specific vendor as well as for a PO submitted and approved by proxy. You can also send an email notification when specified conditions are met. You designate who receives the email notification and compose the actual email notification message.

To enable this feature, [Creating a Support Case](#) and request the following switch be enabled: Enable administration of notifications in the following application settings: Purchases.

To create proposal notifications:

1. Go to Administration > Application Settings > Purchases Settings > Notifications.
2. Select the notification type from the **Create Button**.



3. In the Send a notification... section, select either the type of new notification you are creating or when these conditions are met. Then select the one or more required conditions
4. Proxy: Yes or No - Determines if this notification is used for regular or proxy submissions.
5. Click + to add a row. If you select the Vendor option, you include or exclude specific Vendors.
6. Under Notify, specify either individual email addresses or select employees from the Available employee selection box. External email addresses can also be included.
7. Under Message, enter the desired contents of the email to be delivered. Use the Field drop-down list to specify pre-set variables as part of the email. To do this, choose the variable from the drop-down list and click on **Paste** to insert the variable into the email body.
8. Click Save.

Other Settings

There are several other settings available in the Purchases application.

To access the Purchases Other settings:

1. Go to Administration > Application Settings > Purchases Settings > Other settings.

Allow an approver to edit a submitted purchase request: When purchase requests approvals are used, purchase requests are submitted for review by a defined employee who then approves or rejects the purchase request. To avoid time delays introduced by having the reviewer reject a purchase request then having the owner fix and resubmit the purchase request, activating this option gives the reviewer the ability to edit the purchase request directly before continuing with an approval.

Allow an approver to edit a submitted PO: When PO approvals are used, POs are submitted for review by a defined employee who then approves or rejects the PO. To avoid time delays introduced by having the reviewer reject a PO then having the owner fix and resubmit the PO, activating this option gives the reviewer the ability to edit the PO directly before continuing with an approval.

On purchase requests, show only Clients and projects with open tasks assigned to the employee: This option only permits employees that have been assigned to open tasks on active Client : Project to create a purchase request.

Enable by default the "Automatically track payability with fulfillment" option for new POs: If you select this option, any PO item is indicated as payable when the item has been fulfilled. You may override the setting on a specific PO via the Edit PO form.

Allow modification of the notes field on an approved PO: When a PO has been approved, all fields are locked from changes. By enabling this option, the Notes field can be modified after the PO has been approved.

Allow PO submission even if there are purchase items with no costs assigned: This option enables a PO to be submitted for approval without having a defined cost indicated on the purchase item. Normally, purchase items and products entered on purchase requests have a standard price or cost assigned to them.

Do not auto-populate description field on request items: The description field is automatically populated from the description on the products. Selecting this option does not use the item description and requires the description to be entered on all purchase items.

Duplicate request item attachments to their respective purchase items when creating POs: Attachments to purchase items are automatically duplicated when creating new POs when this option is selected.

Enable the ability to create quick PO items. These are purchase items for purchases made without an NetSuite OpenAir PO: This feature lets you create PO items when purchases have been made without using purchase requests or POs within OpenAir. Generally you would create purchase requests or POs from products that have already been defined in OpenAir. Quick POs are technically purchase items, and are not the standard purchase order record.

Reports

Overview

Name	Action	Class	Owner
All		All	All
**Key Reports			
2.3.1 Project Burn (Hours)	▶ ⬇ ⚙	Account-wide - Company summary	Collins, Marc
3.1.1 Booked Utilization - Monthly	▶ ⬇ ⚙	Resources - Employee summary	Collins, Marc
3.2 Supply vs. Demand Report	▶ ⬇ ⚙	Account-wide - Job code summary	Collins, Marc
4.2 Timesheet Status Report	▶ ⬇ ⚙	Timesheet status	Collins, Marc
7.1 Project Financial Analysis - Profit	▶ ⬇ ⚙	Financial analysis	Collins, Marc
7.2 Backlog Report (\$)	▶ ⬇ ⚙	Customer PO detail	Collins, Marc
7.6 Forecast Revenue by Stage	▶ ⬇ ⚙	Account-wide - Company summary	Collins, Marc

The Reports application provides you with a way to download and report on information from the OpenAir system. It consists of five main tabs and each has its own set of configuration options. The types of [Reports](#) are listed below:

- Summary
- Detail
- Advanced
- Drill Down
- Saved reports

To manage reports, see [Reports Status](#).

To view company report-related switches in Global Settings, see [Reporting Options](#).

The Report Management and Editor optional feature changes the user interface for all except advanced reports and streamlines the way you work with reports. For information about the Report Management and Editor Interface features, see [OpenAir User Guide](#).


Note: To enable the Report Management and Editor feature, contact OpenAir Customer Support. After the feature is enabled, account administrators can give individual employees access to the report management and editor interface.

To give an employee access to the report management and editor interface:

1. Go to Administration > Global Settings > Users > Employees > [Select an employee] > Demographics
2. Check the **Enable the report management and editor interface** box under the Reporting Options form section.

You can use the Bulk employee change wizard to give multiple employees access to the report management and editor interface at the same time.

Reports

 Advanced			
<div>+</div> <div>Create</div> <div>Home</div> <div>Opportunit...</div> <div>Projects</div> <div>Resources</div> <div>Invoices</div> <div>Timesheets</div> <div>Expenses</div> <div>Purchases</div> <div>Reports</div>	Account-wide	Resources	Timesheets
	Hierarchy omissions Summary report values Custom field value omissions Role privileges	Percent booked utilization Percent booked utilization with actuals Percent booking availability Percent booking availability with actuals Weighted percent booked utilization Weighted percent booked utilization with actuals Weighted percent booking availability Weighted percent booking availability with actuals Percent historical utilization Percent realization Percent assigned utilization Percent assigned utilization with actuals Assigned utilization chart Booked utilization chart Resource profiles	Timesheet status Missing timesheets Leave accrual summary
	Opportunities Deal pipeline Estimate analysis Revenue forecast		Expenses Expense report status
			Invoices Accounts receivable Client statements Retainer balances Retainer activity Income received Budgets (money) Budgets (time)
		Projects Planned vs. actual hours Over budget/late tasks Employee tasks Financial analysis Pricing analysis Project overview	

The OpenAir Reports application provides employees who have the appropriate privileges the ability to create and run a wide variety of reports based on your company's configuration. NetSuite OpenAir provides a robust and flexible reporting environment. You are able to choose the fields you wish to see and the order in which they are displayed, along with the ability to filter the data.

There are four general types of reports: Summary, Detail, Advanced and Drill Down (optional). These four report types and their uses are described as follows.

Summary Reports

Summary reports give you access to report information across the OpenAir system such as reporting Timesheet entries along with Invoice information and Project revenue recognition. Reports are created by selecting a base report then completing the report form to configure the options for report generation. Selecting a base entity under the application specific context, rather than Account-wide, will limit the available values to only those in that application. Summary reports provide subtotal capability and flexible data filtering as well as inclusion of custom calculations in the system. See [Custom Calculations Overview](#).



Tip: Columns can be locked in Summary Reports which do not contain a subtotal.

If the option to lock columns isn't available, navigate to User Center > Personal Settings and make sure that the following settings are enabled: **Anchor column titles at top of page when scrolling vertically** and **Enable anchoring of left columns when scrolling horizontally**. Then, navigate to Administration > Global Settings > Interface: Display and make sure that the setting **Enable dynamically collapsible sections in hierarchy lists** is disabled.

If column locking is not available in Summary Reports because they contain a subtotal, you can add at least one detail field to the Report and run it. This will make anchoring available even in Summary Reports with subtotals.

Detail Reports

Detail reports give you access to report information within specific applications or tables such as Employee information. Some information may be rolled-up for a basic sub-total function, but in general, reports in the Detail tab are used to report specific fields for a single object. Calculations are not performed in detail reports and the intended use of these reports is to provide list values of data.

Advanced Reports

Advanced reports provide pre-configured OpenAir reports that have specific functionality and formatting built in. The options for report configuration are generally limited. Key reports in this area include: Pending billings and Pending recognition reports, Timesheet status, Accounts receivable, and a variety of resources utilization reports.

Drill Down Reports

Drill down reports are useful if you are using Hierarchies with multiple levels in your company's environment. You can create reports by selecting the specific Hierarchy and Level within the hierarchy.

You will also need to provide a Time period-Dates, the Application for which the hierarchy is associated, Data values and Other options. See [Hierarchy](#).

Note: The Drill Down tab is an optional feature that is enabled unless you select the **Hide the 'Drill down' reports tab** available in Reporting Options. See [Reporting Options](#).

Reports Status

The Reports status screen provides you with an overview of report statuses and details. This is a report management tool that lets you monitor the status of reports and take action on long running reports impacting performance, stale reports, etc.

It consists of three views.

- [All](#)
- [Running](#)
- [Maintenance](#)

All

Action	Report Name	Owner	Owner Active	Date last run	Date last saved	Total runs	Scheduled time
<input type="checkbox"/> ▶ ✕ 🔄 🗑️	4.1 Timesheet Hours - 4 weeks	Collins2, Marc2	✓	2020-02-12 12:10	2020-02-12 10:08	4	

From the **All** view you can see details on how reports are being used in your account.

You can also select one or more reports and run a bulk action to:

- **Delete the selected report**
- **Remove the selected report from schedule**
- **Change the report owner**

You can also change the report owner from the **Report owner** section on each saved report.

Summary Detail Advanced Drill down **Saved reports** Status Options

General
Options
Other
Usage designations
Report owner

Options

Other

Usage designations

Report owner

Owner: Admin, Jim

Running

Honeycomb SERVICES

Summary Detail Advanced Drill down Saved reports **Status** Options

All

<input type="checkbox"/>	Report name	Run by	Started	Duration [sec]
<input type="checkbox"/>	All	All		
<input type="checkbox"/>	Projects project summary	Collins, Marc	05/06/14 09:12 AM	151,205

From the **Running** view you can see all the details for the reports that are currently running.

You can also select one or more reports and run a bulk action to **Stop the selected report**.

Maintenance

All Running **Maintenance**

<input type="checkbox"/>	Action	Report name	Owner	Date last run	Total runs	Scheduled time	Schedule active
<input type="checkbox"/>		All	All	All		All	All
<input type="checkbox"/>	<input type="button" value="Stop"/> <input type="button" value="Refresh"/> <input type="button" value="Delete"/>	All assigned days	Thompson, Jane	03/22/15 06:00 PM	1	Monday @ 12am, 0th minute	✓

From the **Maintenance** view you can see all the active scheduled reports with inactive owners. This tab is available for administrators to clean their active scheduled reports.

Reporting Options

Cancel
SAVE

General
Weekly and Bi-weekly report columns starts on
Monday
Date to use in column titles
☒ Use starting date
☐ Use ending date

Not applicable settings
Used when the value is not applicable in the report context
Display as
n/a
Download as
n/a

Display settings
Wrap multi-line text fields at
50 characters

Adobe Acrobat PDF settings
Page orientation
☐ Portrait
☒ Landscape
☒ Suppress the company logo
☐ Suppress the report title
☒ Preserve color coding
Font size
8
Grid style
Thin grid lines with no vertical lines

Multiple currencies
Select the currencies you want to report on
Available
Australia Dollars
British Pounds
Canada Dollars
Euro
United States Dollars
Selected
United States Dollars
Add selected >
Add all >
< Remove selected
< Remove all
☐ Enable higher multicurrency rounding precision on Summary reports

Reporting Options settings provide system-wide controls on the appearance of OpenAir reports and functions available in within the Reports application. In the following steps, we address the Options tab, which lets you configure the Global report options form. These Global report options affect the appearance of reports.

To view company report-related switches in Global Settings, see [Reporting Options](#).

To set Global Report options:

1. Go to Reports > Options.
2. Select the Weekly and Bi-weekly report columns starts on. The default is Monday.
3. Select the Date to use in column titles: Use starting date or Employee ending date.
4. Designate how to handle settings when a value is not applicable in the report context.
5. Enter Display settings to wrap multi-line text fields at. The default is 50.
6. Select Adobe Acrobat PDF settings and identify other page display properties.

7. Enter Font size and select Grid style
8. Identify Multiple currencies you want to report on.
9. Click Save.

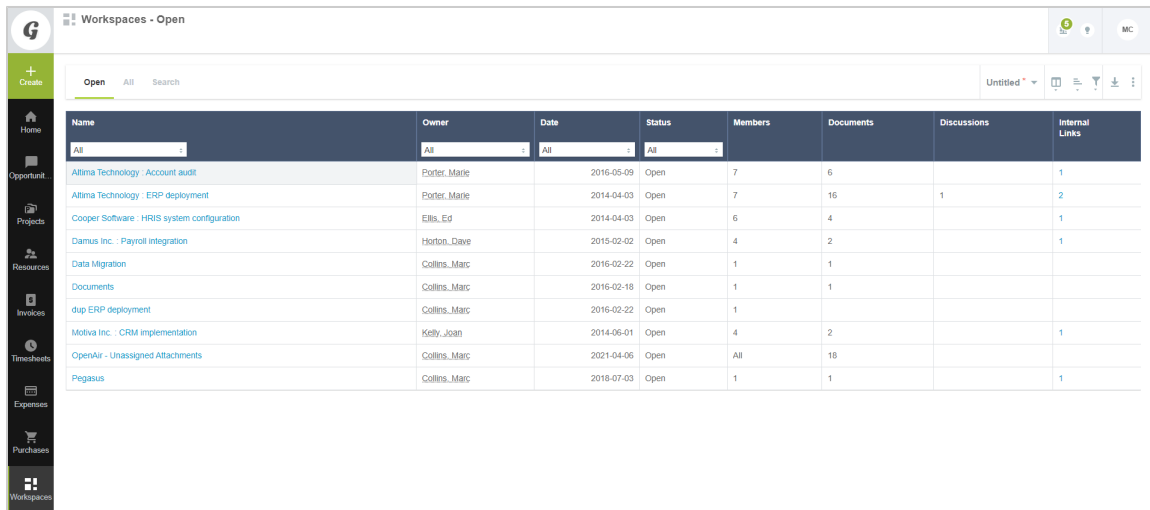
Frequently Asked Questions (FAQs)

What are the differences between the types of reports and how would I use them?

Refer to the following descriptions:

- **Summary reports** (also called **Crosstabbed reports** in the Report Management and Editor tools) provide a great deal of flexibility in reporting. You are able to subtotal on many fields and incorporate fields from different applications into the reports.
- **Detail reports** (also called **Tabular reports** in the Report Management and Editor tools) concentrate on specific entities within the applications and you can customize the reports to your needs. For example, you can create a report on project details or invoice details based on the information available within the entity you select.
- **Advanced reports** are standard reports provided by OpenAir. You have the option to modify some parameters within the report.
- **Drill Down reports** are used to provide specialized reporting on hierarchies you have set up in the system such as employee country, state, and project regions. The Drill Down tab is an optional feature that is enabled unless you check the **Hide the 'Drill down' reports tab** option under the Reporting Options. See [Reporting Options](#).
- The **Saved Reports** tab shows customized reports that you or others in your company have created in the system. These are used in the charts and graphs you display in the Home application.

Workspaces



Name	Owner	Date	Status	Members	Documents	Discussions	Internal Links
All	All	All	All				
Altima Technology - Account audit	Porter, Marie	2016-05-09	Open	7	6		1
Altima Technology - ERP deployment	Porter, Marie	2014-04-03	Open	7	16	1	2
Cooper Software - HRIS system configuration	Ellis, Ed	2014-04-03	Open	6	4		1
Darius Inc. - Payroll integration	Horton, Dave	2015-02-02	Open	4	2		1
Data Migration	Collins, Marc	2016-02-22	Open	1	1		
Documents	Collins, Marc	2016-02-18	Open	1	1		
dup ERP deployment	Collins, Marc	2016-02-22	Open	1			
Motiva Inc. - CRM implementation	Kelly, Joan	2014-06-01	Open	4	2		1
OpenAir - Unassigned Attachments	Collins, Marc	2021-04-06	Open	All	16		
Pegasus	Collins, Marc	2016-07-03	Open	1	1		1

Overview

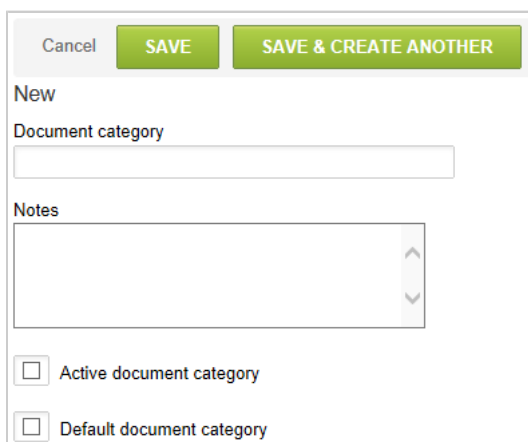
The Workspaces application provides employees with an area to store project-related documents and share them with other team members. The workspace owner control who can access the workspace area by granting workspace membership to individual employees, assignment groups, or all employees. The workspace owner can control members access rights as read-only, read/write, or administrator.

After you create a workspace, you can add a discussion thread. The discussion could be about anything related to the workspace such as a project, for example. You can also add documents, and edit the properties of the workspace. You can search workspace documents and discussions using keywords.

You can manage alerts for documents and discussions by selecting the events that trigger an alert and designate members who receive the alert. You can check the **"Exclude alerts" on by default** box to disable alerts by default for all documents and discussions in a workspace.

You can set up an Account storage alert that will notify you when a certain percentage of your account storage capacity is used.

Document Categories



Cancel
SAVE
SAVE & CREATE ANOTHER

New

Document category

Notes

☐ Active document category

☐ Default document category

Within the Workspaces application you are able to define specific Document Categories to use in OpenAir. You can apply these categories to your documents when loading them into the workspace or folders within a workspace. Identifying documents by category enables you to easily track and maintain the documents you load into NetSuite OpenAir.

To create Document categories:

1. Go to Administration > Application Settings > Workspaces > Document categories.
2. Select **New Document category** from the **Create Button**.
3. Enter the Document category name and Notes, if desired.
4. Select the check box for **Active document category**.
5. You may optionally select one of the document categories to be the default category by selecting the check box for **Default document category**.
6. Click Save.

Searching Workspaces, Documents or Discussions

You can search workspaces, documents or discussions for specific keywords.

By default, the search functionality include document names only. You can extend the document search to the documents content as well as document names. To do so, go to Administration > Application Settings > Workspaces > Other Settings and check the **Enable document content searching** box. See [Other Settings](#).

The Search feature is available in the following locations:

- Workspaces > Workspaces > Search
- Workspaces > Documents > Search
- Workspaces > Discussions > Search
- Workspaces > Workspaces > [Select a workspace] > Search
- Workspaces > Workspaces > [Select a workspace] > Documents > Search
- Workspaces > Workspaces > [Select a workspace] > Discussions > Search

To search workspaces, documents or discussions:

1. Go to one of the locations above.
2. Enter one or more **Keywords**.
3. Choose which workspaces you want to include in your search. You can include:
 - **All** workspaces
 - **Open** workspaces only
 - **Selected** workspaces only

If you choose to include selected workspaces only, click **Create** and select the workspaces to include in your search.



Note: You cannot select the workspaces you want to include in the search if you are viewing a workspace, or a document or discussion sublist within a workspace.

The **Selected** option is available only in Workspaces > Workspaces > Search.

4. Select all the record types you want to include in your search:

- **Workspaces** — Available only Workspaces > Workspaces > Search
- **Documents** — Available only Workspaces > Workspaces > Search and Workspaces > Workspaces > [Select a workspace] > Search
- **Discussions** — Available only Workspaces > Workspaces > Search and Workspaces > Workspaces > [Select a workspace] > Search

5. Click **Search**.

A list view appears showing the search results.

Search workspaces

Cancel Search

Keywords *

Enter keywords separated by a space

Workspaces

☒ All

☐ Open

☐ Selected > Create

Search

☐ Workspaces

☐ Documents

☐ Discussions

Cancel Search

Downloading Documents from a Workspace


This feature is available in the following locations:

- Workspaces > Documents > All
- Workspaces > Documents > Search
- Workspaces > Workspaces > Search
- Workspaces > [Select a workspace] > Search
- Workspaces > [Select a workspace] > Documents

You can download documents one by one, download multiple documents at the same time, or download all documents in a specific workspace or across all workspaces.

- [Downloading a Document](#)
- [Downloading Multiple Documents at the Same Time](#)
- [Downloading All Documents from a Workspace](#)

■ Downloading All Documents from All Workspaces

 **Note:** You can also use the Automatic Backup Service to download all documents from all workspaces along with your OpenAir data at a regular scheduled time. See [Automatic Backup Service](#).


Downloading a Document

You can download documents one by one from the documents list view.

To download a document:

1. Do one of the following:
 - Go to Workspaces > Documents.
 - Go to Workspaces > [Select a workspace] > Documents.
 - Search for a document. See [Searching Workspaces, Documents or Discussions](#).
2. Locate the document you want to download.
3. Click the download icon in the actions column (redesigned list view) or click Download from the Commands column (otherwise).

Depending on your browser settings, the file download starts automatically or a window appear prompting you to choose a download location.

 **Tip:** Use the Column selection panel in the list view toolbar to add the Commands column to your list view.

Downloading Multiple Documents at the Same Time

You can download multiple documents as a ZIP archive from the documents list view or the documents search results.

To download multiple documents at the same time:

1. Do one of the following:
 - Go to Workspaces > Documents.
 - Go to Workspaces > [Select a workspace] > Documents.
 - Go to Workspaces > Search, and search documents for one or more keywords.
 - Go to Workspaces > [Select a workspace] > Search, and search documents for one or more keywords.
2. Check the box in the bulk action column for all the documents you want to download. Check the box or click **Select All** in column header to select all documents on the list view page.
3. Click **Bulk actions** then **Download selected**.



Depending on your browser settings, a file download starts automatically or a window appear prompting you to choose a download location. The ZIP archive default filename is "OpenAirDocuments.zip".

Downloading All Documents from a Workspace

You can download all documents from a workspace as a ZIP archive.


To download all documents from a workspace:

1. Go to Workspaces > *[Select a workspace]*.
2. Click **Download all documents**.
The Download all documents form appears
3. (Optional) Check the **Include folders** box if you want the content of the ZIP archive to preserve the folder structure of your workspace documents.
4. (Optional) Check the **Include document revisions** box if you want to download all previous revisions of each document. Revisions for each document will be placed in a subfolder.
5. (Optional) Check the **Delete all documents** box to delete the documents from OpenAir after downloading them.

 **Note:** This option is available only if the Documents Bulk Deletion on Download optional feature is enabled for your account. See  [OpenAir Optional Features Book](#).


6. Click **Download**.
A page appears including a link to a ZIP archive containing all documents with the options selected. If you checked the **Delete all documents** box, the page confirms that all documents in the workspace were deleted.
7. Click the link to the ZIP archive to initiate the file download.

Downloading All Documents from All Workspaces

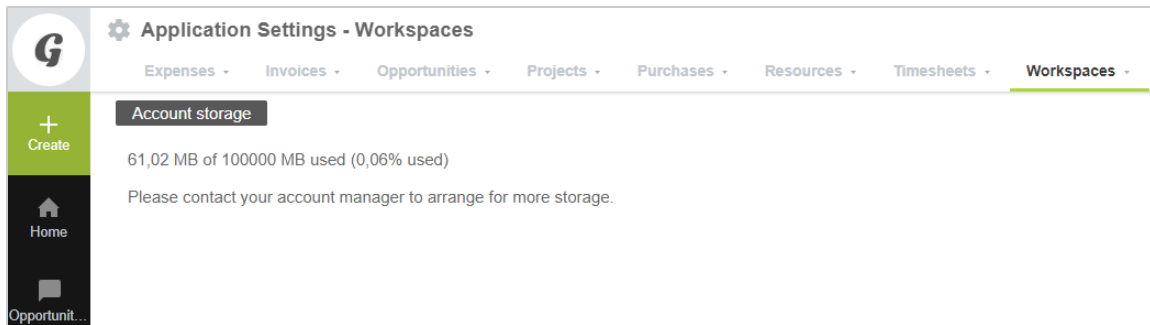
You can download all documents from all workspaces at the same time if the Download All Documents Across All Workspaces optional feature is enabled for your account. See  [OpenAir Optional Features Book](#).

To download all documents from all workspaces:

1. Go to Administration > Application Settings > Workspaces > Download all documents.
2. Click **Download**.
Depending on your browser settings, a file download starts automatically or a window appear prompting you to choose a download location. The ZIP archive default filename is "Workspace_Documents_YYYY-MM-DD.zip". The Zip archive contains all documents and all revisions for each document, and preserves the folder and document structure.

 **Important:** If you have a large volume of workspace documents stored on your OpenAir Account, generating a large ZIP archive for download may take a long time and your browser may time out.

Account Storage



When using the Workspaces application to store your company's documents, you can monitor the amount of storage space currently used and the total amount of storage space available on your account. The default storage space available is 5MB. To increase the storage capacity for your account, contact your OpenAir account manager.

To view the account storage capacity and space used, go to Administration > Application Settings > Workspaces Settings > Account storage.

You can set up an Account storage alert that will notify you when a certain percentage of your account storage capacity is used. See [Creating an Account Storage Alert](#).

You can use the following features to take a copy of the documents stored in OpenAir and delete documents at any time to manage your account storage.

- You can use OpenAir Automatic Backup Service to schedule the regular delivery of your OpenAir account data including documents and attachments. See [Automatic Backup Service](#).
- You can download and delete workspace documents. See [Downloading Documents from a Workspace](#).
- You can delete reimbursed or approved expense attachments for a specified date range. See [Expense Attachment Deletion Wizard](#).

Creating an Account Storage Alert

You can configure OpenAir to check the amount of storage space currently used on your account at regular interval and notify you when the storage space used reaches a percentage of the capacity allowance for your account.

To create an account storage alert:

1. Go to Administration > Applications Settings > Workspaces Settings > Alerts.
2. Click the Create button then **New account storage alert**.
3. Enter an **Alert name**.
4. **Alert runs on** – Select the Day and Time you want to schedule the alert to run.
5. **Rule** – Enter the percentage of storage capacity above which notification email should be sent.
6. Enter the following **Email notification** information:
 - **The email is from** – Sender email address.
 - **The email will be sent to** – Recipient email address.

- **Subject** line.
 - **Additional text to include** in the body of the email.
7. Check the **Active alert** box.
 8. Click **Save**.

Other Settings

There are several other settings you can select related to Workspaces.

To access the Workspaces Other settings:

1. Go to Administration > Application Settings > Workspaces > Other Settings.

Require a document category when checking in documents: Document categories are configured to group documents by type for easy reference. If this option is checked, ensure you have set up all necessary document categories so a valid value is always available. If this option is unchecked, employees may optionally choose a document category provided values exist. If values do not exist, the field does not display when creating or loading a document.

Require a comment when checking in document revisions: The comment field is optional unless this option has been selected. Requiring a comment on document revisions helps enforce policies such as including a summary of changes on the document history.

Require a message body when creating a new message or replying: The Workspaces application enables discussions to be entered and tracked. Checking this option prevents empty messages from being created, which may also trigger notifications to employees involved in the discussion depending on the alert settings within the workspace.

Add the client name in auto-created project workspaces: When creating a project, the project creator is given the option to create an associated workspace. By default, the name of the workspace includes the project name and the base workspace name, if one was copied. Selecting this switch also includes the client name in the name of the workspace. This is helpful if you have projects with similar or the same name to ensure you have unique workspace names.

Enable document content searching: Check this box to extend workspace document search to the content of documents in addition to the document names. See also [Searching Workspaces, Documents or Discussions](#).

After you enable this feature, go to Administration > Global Settings > Account > Maintenance Settings, choose **Build document content search indexes** and click **OK**. This indexes all workspace documents to support the search functionality.



Important: Enabling document content search reduces the amount of storage space available on your account as storage space is required for content indexing.

Home

Overview

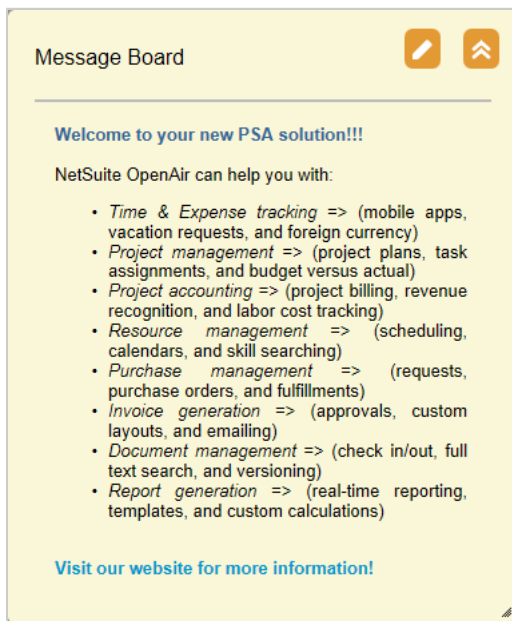
The Home application is your OpenAir home page. As a System Administrator, you can use the Home application to convey critical information to employees such as messages and reminders of actions to complete in the system such as approvals.

The Home application includes tabs for Home, Dashboard, and Calendars. The Home tab provides a place to distribute an account-wide message to all employees. It also displays reminders for items waiting your approval and links to those items. Other portlets include My Status and Company status, Charts, Reports, and Wizards.

Home

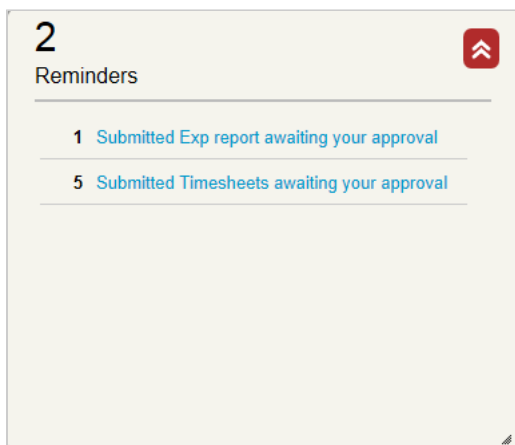
Home is the information tab under the Home application.

Message Board



You can post a central message or a department-specific message to the Message Board area. This is a good place to publish your processes, instructions, and general information with regard to using NetSuite OpenAir within your company.

Reminders



Reminders provide information about items in OpenAir that require your action. Typically this is a data-related item awaiting your review and approval such as a timesheet or expense report. Any item within OpenAir that requires a submit action may have a routing or approval process associated with it. A notification then displays in the Reminders portlet for those required to complete a review action.

Wizards

Wizards are generally available to System Administrators but may be made available to others through role permissions. A wizard is a quick way to copy data or complete an action such as receipt deletion across multiple items at one time. There are four basic wizards available:

- Bulk employee change wizard
- Expense report attachment deletion wizard
- Bulk task change wizard
- American Express receipt import wizard

Bulk employee change wizard — provides the capability to copy many fields from one employee across to multiple employees. The Copy from employee must be an active employees, but the Copy to may include inactive employees. For ease of employee identification, you have the option to copy to employees in entire Departments or one by one. When employees are selected, selecting Run will copy the identified fields to the identified employees.

Note: There are field restrictions with this feature. For example, you cannot copy the password field. If you do not see the desired field available, you may need to consider a data update using the OpenAir Integration Manager. See [Access Control](#) and specifically, Exchange Access under Employees.

Expense report attachment deletion wizard — lets you clean up storage use within NetSuite OpenAir by deleting attachments on older expense reports that have been reimbursed or approved.

Bulk task change wizard — gives you the ability to copy a task field setting across tasks within a single project. This is helpful for project maintenance on larger projects.

American Express receipt import wizard — lets you connect to an American Express online statement and download your receipts into a pre-existing expense report.

Using Wizards

The following guides administrators in using several of the wizards.

Bulk Employee Change Wizard

Administrators can copy an employee setting from one employee to other employees and/or departments in mass. Make a change to one employee account and copy it to others. Go to Dashboard and click the link for Bulk employee change wizard. Step 1 of the wizard displays. Identify the employee to copy from. Identify the information you want to copy. Select whether it is to copy to an employee or department and click next. Step 2 of the wizard displays. Select the employees to copy to and click run.

Bulk Task Change Wizard

Administrators can copy information from one task to another task in that project. Go to Dashboard and click the link for Bulk task change wizard. Step 1 of the wizard displays. Identify the client and project. Select the task to copy from. Select the information to copy to another task. Click next. Step 2 of the wizard displays. Select the task to copy to. Click run.

Expense Report Attachment Deletion Wizard

Administrators can delete all the attachments from an expense report and its receipts to free up storage space. Generally, you do this when the expense report is reimbursed or approved and the attachments are no longer needed. Go to Dashboard and click the link for Expense report attachment deletion wizard. Enter the start and end dates. Select whether the expense report status is reimbursed or approved and click delete the attachments.

Frequently Asked Questions (FAQs)

When would I use the wizards?

The wizards are used when you want to update a large quantity of data in the system at one time. For example, you may want to update various fields from one employee to others using the "Bulk employee change wizard" or you can use the "Expense report attachment deletion wizard" to remove these attachments in bulk based on your parameters.



Note: Be cautious when using the wizards since a large number of records may be affected due to the action. You may want to consider using OpenAir's "Integration Manager" for updates on specific fields. See [Access Control](#) and specifically, Exchange Access under Employees.

Status

The Status areas of Home provides information about data-related items within your OpenAir account. It includes My Status and Company status. Each is explained as follows.

My Status — Employees may find the My Status area helpful as a summary of key elements in NetSuite OpenAir, such as their open timesheets or expense reports. Open tasks and issues are also noted that may be helpful, depending on your configuration and use of OpenAir. In many cases, general overhead or administrative projects capture non-billable time so these tasks are always open and contribute to the open tasks count on My Status.

Company Status — The Company Status area provides similar information to My Status, but with a company-wide view in the OpenAir environment. As a System Administrator, you may find this information helpful as well as other managers. You can limit access to the Company Status area through form permissions.

Note: Depending on your configuration and use of OpenAir, you may not need the My Status and Company Status portlets to show the number of open or incomplete tasks. To remove the number of incomplete tasks, contact OpenAir Support and ask for the following switch to be disabled: "Display incomplete tasks on dashboard".

Reports

Name	Action	OData...	Share status	Shared users	Publish status	Last published	Publish type
6.1 Leave Accrual Summary PAR			Shared with all employ...	All	Not published		Business Intelligence Connector
3.3 Target Utilization Test		report84	Shared with 1 employee	Collins2, Marc2	Successfully published with owner's permissions	2020-02-17 12:15:03	Business Intelligence Connector
6.1 User Administration & Mana...			Not shared				
6.1 Leave Accrual Summary			Shared with all employ...	All	Not published		Business Intelligence Connector
6.2 User Set-up Validation			Not shared		Not published		Business Intelligence Connector
6.3 Cross charge analysis			Not shared		Not published		Business Intelligence Connector
6.4 Security Role Differences			Not shared		Not published		Business Intelligence Connector
1.1 Opportunity Management			Not shared				
1.1 New Projects Validation			Shared with 3 employees	Bauer, Ada Carter, Tom Collins2, Marc2	Successfully published	2021-10-01 02:55:01	NetSuite Connector
4. Time Administration & Mana...			Shared with 3 employees	Carter, Tom Ellis, Ed Porter, Marie			
4.1 Timesheet Hours - 4 weeks			Shared with 51 employ...	Adams, Mary Adams, Mary Bauer, Ada Carr, Bill Carr, Bill Carter, Tom Carter, Tom Collins2, Marc2 Cox, Brian Davis, Judy Ellis, Ed	Not published		Business Intelligence Connector

You can mount reports here instead of having employees access them from the Reports application. A one-click execution is all that is required to run the report and display the results. This gives employees an easy way to run critical operational reports in a dashboard fashion.


Home and Dashboards

Charts are created in the home and dashboard tabs under the Home application. Charts provide a graphical representation of data in saved reports to which an employee has access.

When you have enabled selections on the Employee Demographic form for enhanced user interface and the Administration application view, employees can create and customize graphs available within the Dashboard that display Saved reports. These are available by accessing the Home application and selecting the Dashboard tab. You must also contact OpenAir Support and request the Dynamic Chart Feature if it is already not enabled in your OpenAir account. When enabled, the links and information available for graphs are under the Dashboard tab.

Important: Each report portlet can show a maximum of 2,000 rows of data by default. To increase this limit for your account contact OpenAir Customer Support. Increasing the maximum number of rows may impact performance. We recommend that you use filters to reduce the report size so all data show on the portlet.

To create a chart:

1. Create a Summary, Detail or Utilization report. Go to the Reports application and select a Summary, Detail or Advanced (Resources-Utilization only) report. See [Reports](#).
2. Modify the report parameters as necessary for you company's needs.
3. Check the Save this report as... check box and enter a report name in the field. Save the report.
4. Go to Home > Dashboard and select **New chart** from the **Create Button**  .
5. In the New Chart form, enter the Chart type
6. Enter the Chart Title. This displays on the top of the chart or graph.
7. Select the specific Saved Report from the drop-down list.
8. Choose the Report Value. If the Report contains multiple values, you can select multiple Report Values within the chart form when you use one of the following chart types: Line, Horizontal multi-bar or Vertical multi-bar.
9. to view multiple chart values, select Add to display multiple report values. Choose the sort order (Desc - descending or Asc - ascending) and select the appropriate Display values from the drop-down list.




Note: The default behavior is to chart the maximum number of values. For multi-value charts, a check box displays to Use grand totals.

10. You can resize charts within the Dashboard. To resize a chart, click on the lower right corner of a chart and drag to expand.

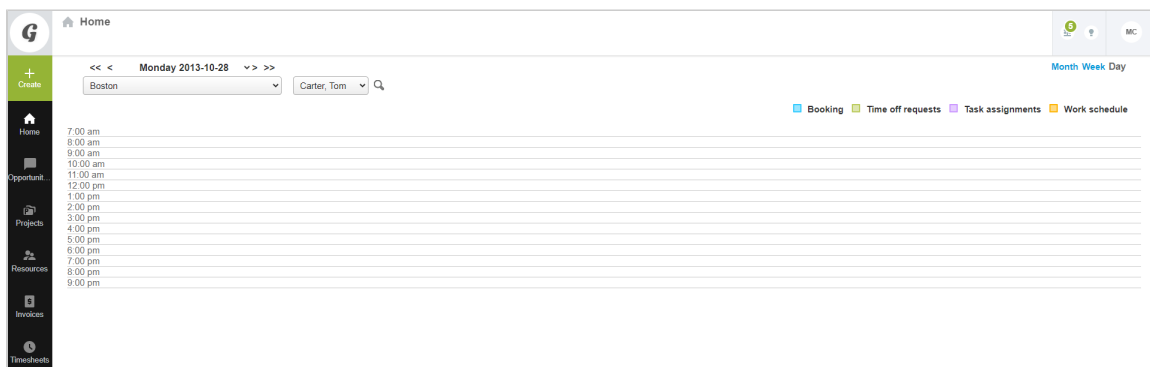
You can also create charts and graphs under different tabs in the application. For example, you may have one tab for Financial information and another for Utilization information.

To create a new dashboard tab:

1. Go to Home > Dashboard and select **New tab** from the **Create Button**  . The following selections are available:
 - New chart
 - New report
 - New tab

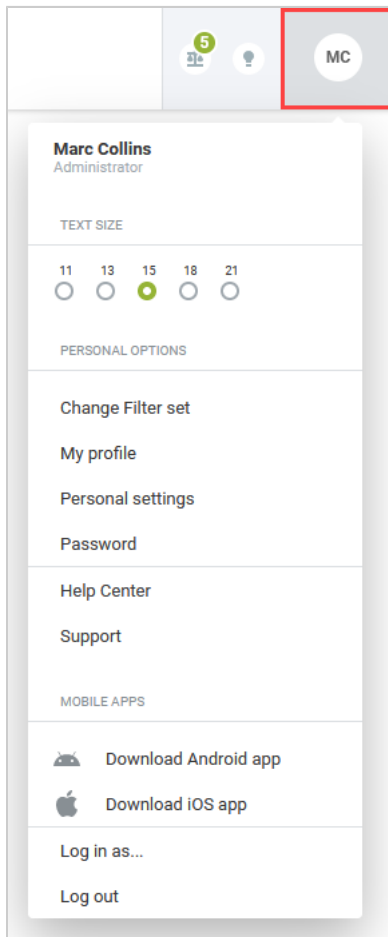
You also have the ability to copy charts and graphs from one Employee to another or to a Department. To do this, use the Bulk employee change wizard. See [Wizards](#).

Calendar



Calendars is a display feature that gives you a schedule view of information as captured within OpenAir. Here, they also have the ability to see other employees' calendars provided you, as the System Administrator, have granted them the appropriate form permissions and filter sets.

User Center



A number of OpenAir employee functions display under the User Center menu, the setting of personal account options, managing an employee password and, the Log in as... that provides proxy capability.

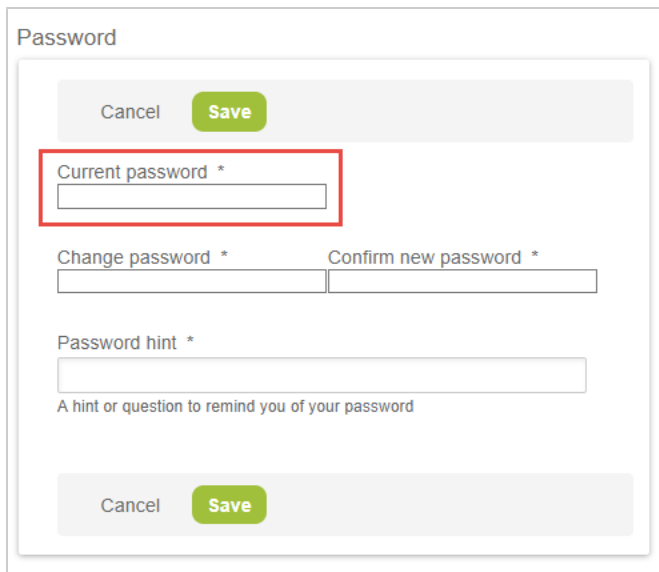
Personal Settings

Employees can configure a number of personal settings and optional features under this tab. This is where they select the check box to allow support log in as well as identify a number of account and application options. Each employee may set print settings and choose the application that displays upon log in.

Password

This is where employees manage and make changes to their password.


If your account has the **Verify Password Before Change** feature, a user changing their password must also enter the old password. This feature enables a new required field called Current Password, which is used when a user changes their password. The correct password must be entered before the password will be changed. Please contact OpenAir Support to enable this feature.



The screenshot shows a 'Password' form with the following fields and controls:

- At the top: 'Cancel' and 'Save' buttons.
- A red rectangular box highlights the 'Current password *' field.
- Below that are two side-by-side fields: 'Change password *' and 'Confirm new password *'.
- Below those is a 'Password hint *' field.
- Under the hint field is the text: 'A hint or question to remind you of your password'.
- At the bottom: 'Cancel' and 'Save' buttons.

This feature also affects changing a password when it has expired, or if a user created an invalid password (for example, with the incorrect number of alphanumeric characters) and must create a new password which conforms to the rules.

 **Warning:** If your account has a maximum number of login attempts setup, typing the current password incorrectly when changing passwords will count towards the allowed password attempts.

Log in as...

When you, as a System Administrator, grant proxy permission to an employee, you identify the other employees that individual can log in as. When an employee selects **Log in as** from the **User Center** menu, a list of employees displays. To log in or proxy in as another employee, the employee clicks on an employee name and a new instance of OpenAir displays so that the employee can perform a function for the proxied employee. See [Proxy](#).

Change Filter set

When you assign employees several filter sets, they will have the additional **Change Filter set** User Center menu item to select the active filter set. See [Filter Sets](#).

Opportunities

Overview

All					
Prospect	Client				
show all	hide all				
Name	Phone	Email	Web Address	Territory	
All				All	
Altima Technology	415-230-9600	ap@AltimaTechnology.com	www.AltimaTechnology.com		
R. Jones	770.343.3434	rjones@AltimaTechnology.com			
J. Smith	617.555.1111	jsmith@AltimaTechnology.com			

The Opportunities application lets you capture prospect information about a potential client and an existing client. You can add contact information, deal information, an estimate, a proposal, proposal templates, and business types, client sizes, client sources, and territories.

Approval Processes

See [Approval Processes](#) under the Timesheets chapter.

Note: You can access the full list of approval processes defined for your account from any of the Expenses, Invoices, Opportunities, Purchases, Resources, and Timesheets application settings. The same approval process may be used for different transaction types across different OpenAir modules.

Deal Stages

Cancel
SAVE
SAVE & CREATE ANOTHER

New

Deal stage

Percentage

A value between 0 and 100 for forecasting probability calculations

Other

Position

After 100%

The position determines the order of the deal stages

Notes

Deals are the primary object in tracking pipeline opportunities within OpenAir when using the Opportunities application. Deals, when created, may be matured to include estimates and can result in a proposal in the Opportunities application or project in the Projects application.

When creating a deal, a standard field on the deal form is the Deal Stage. Deal stages can be defined per your established sales process to track maturity of an opportunity in the pipeline.

To define a Deal stage:

1. Go to Administration > Application Settings > Opportunities Settings > Deal stages.
2. Select **New Deal stage** from the **Create Button**.
3. Enter the Deal stage name and a representative Percentage to be used by OpenAir for weighted pipeline reporting. As deal stages are entered, you also can indicate the order in which the deal stages are presented to the employee in the drop-down field option on the deal form.
4. Add Notes about the deal stage, if desired.
5. Click Save.

Proposal Layout

Cancel
SAVE

Edit

Date format

none (use default date format)

Grid style

Regular grid

Starting proposal #

1

Increment proposal # by

1

Show these columns on the proposal

Content	in column 1
Units	in column 2
Rate	in column 3
Total	in column 4
	in column 5
	in column 6
	in column 7

☐ Hide proposal total

Adobe Acrobat PDF settings

Page orientation

☒ Portrait
☐ Landscape

☐ Expand the page width to fit the proposal

Top margin

0

☒ All pages
☐ First page only

Specify a top margin (in PostScript points) if printing on letterhead paper.
72 points = 1 inch = 25.4 mm

Proposals generated in OpenAir are built by adding various proposal components such as text items, hourly items, and fixed fee items. Together these components make the proposal a report that can be mailed directly to clients for review and acceptance.

The proposal report that the client sees via the proposal link in the email is controlled by the Proposal Layout option. Here you may identify which columns are displayed to the client and in what order. You can identify the layout of the paper, the type of lines to display such as a grid or none, the format of dates, and the top margin to accommodate your company logo, unless you've chosen to override margin control in the logo settings. See [Logos: UI, documents](#). The proposal layout form also doubles as a configuration for the starting number for proposals. The default starting number is 1 and proposals are incremented by default by 1.

To define a Proposal layout:

1. Go to Administration > Application Settings > Opportunities Settings > Proposal layout.

Templates

The screenshot shows a web form for creating a new template. It has a title 'New Template' and a text input field for the template name. Below it is a large text area labeled 'Content' for the template text. At the bottom are three buttons: 'Cancel', 'SAVE', and 'SAVE & CREATE ANOTHER'.

You can generate proposals in OpenAir using standard text and estimates including hours and rate, fixed fee values, and expense costs. Text items added to a proposal may reference defined Templates to ensure standard wording is used on all proposals. A typical example of this would be disclaimer text or copyright text.

When a template exists and a proposal is being created, you can create text items for the proposal and either enter custom text or select a defined template that uses the text defined in the template. If a template does not exist, the option to select a template does not display when you are creating text items for the proposal.

To create a Template:

1. Go to Administration > Application Settings > Opportunities Settings > Templates.
2. Select **New Template** from the **Create Button**.
3. Enter the Template name and the standard wording for the template in the Content text area.
4. Click Save.

Territories

You can assign Territories to clients, prospects, and deals. These are an arbitrary geographical designation that you name. When you create them, you can include territory information when you create

client records. This field is visible on the list view of the client data and in reports. Definition of territories is related to Opportunities when there is an organizational structure defining regions of client aligning with the sales organization. Examples are: East, West, US, and EMEA. If territories are not defined, then the field does not display on the Client form. See [Clients](#).

Territories may be created or inactivated at any time. Inactive territories do not appear as a valid selection on Client forms. Due to the general nature of the Territory form, you may chose to use this field for another purpose and rename Territory. See [Interface: Terminology](#).

Business Types

You can create Business Types to capture OpenAir standard demographic information that includes Business types. This field is visible on the list view of the client data and in reports. Definition of business types is related to how your company groups types of Clients. Examples are by vertical such as Healthcare and Education, or by industry such as Energy and Transportation. If business types are not defined, then the field does not display on the Client form. Business types may be created or inactivated at any time. Inactive business types do not appear as a valid selection on Client forms. See [Clients](#).

Client Sizes

You can create Client Sizes records to capture OpenAir standard demographic information that includes Client Sizes. This field is visible on the list view of the client data and in reports. Definition of client sizes is generally interpreted in terms of employees or revenue. Examples are less than 100, 101-500, 501-1000 if employee based, or less than \$500K, \$1M-\$5M if revenue based. If client sizes are not defined, then the field does not display on the Client form. Client sizes may be created or inactivated at any time. Inactive client sizes do not appear as a valid selection on Client forms. See [Clients](#).

Client Sources

You can create Client Sources to capture OpenAir standard demographic information that includes Client Sources. This field is visible on the list view of the client data and in reports. Definition of client sources is generally interpreted as how the client was obtained. Examples are referral, marketing campaign, trade show, cold call, etc. If client sources are not defined, then the field does not display on the Client form. Client sources may be created or inactivated at any time. Inactive client sources do not appear as a valid selection on Client forms. See [Clients](#).

To define Territories, Business Types, Client Sources or Client Sizes:

1. Go to Administration > Application Settings > Opportunities Settings and select either Territories, Business types, Client sizes, or Client sources.
2. Select the New entity you wish to create from the **Create Button**.
3. Enter the name of the particular entity value.
4. Add Notes for the value, if desired.
5. Click Save.

Notifications

The screenshot shows the 'Notifications' configuration form in OpenAir. At the top are 'Cancel' and 'SAVE' buttons. The form is divided into several sections:

- Send a notification ...**: A dropdown menu currently set to 'When any proposal is approved'.
- Notify**: Contains two columns: 'Available' and 'Selected'. The 'Available' column lists roles: [Approver's department head], [Approver's manager's manager], [Approver's manager], [Approver], [Co-Approver], [Submitter's department head], [Submitter's manager's manager], and [Submitter's manager]. Below these columns are buttons: 'Add selected >' and 'Add all >' between the columns, and '< Remove selected' and '< Remove all' under the 'Selected' column.
- External email addresses**: A text input field with a note: 'Separate multiple addresses with a comma. For email with multiple recipients:'. Below is a dropdown menu set to 'Send each email separately'.
- Email message**: Contains a 'Subject' field with 'Proposal approved' and an 'Email body' text area with the template: 'The proposal "%name%", approved by %approved_by%, is approved'. Below the text area is a 'Field' dropdown menu set to 'Select...' and a 'Paste' button. A note at the bottom says: 'Select the field and click "Paste" to use it in the body'.

Opportunities email notifications are highly configurable in OpenAir. You can send an email notification when a proposal is approved, submitted, rejected, or when an approval is requested. You can send an email notification involving a specific company as well as for a proposal submitted and approved by proxy. You can also send an email notification when specified conditions are met. You designate who receives the email notification and compose the actual email notification message.

To enable this feature, [Creating a Support Case](#) and request the following switch be enabled: Enable administration of notifications in the following application settings: Opportunities.

To create proposal notifications:

1. Go to Administration > Application Settings > Opportunities Settings > Notifications.
2. Select the notification type from the **Create Button**.

The screenshot shows the 'Create New' notification form. It has a green '+' button in the top left corner. Below it is a text input field. Underneath is a section titled 'New' with a list of notification types: 'Proposal approved notification', 'Proposal submitted notification', 'Proposal rejected notification', 'Proposal approval requested notification', and 'notification'.

3. In the Send a notification... section, select either the type of new notification you are creating or when these conditions are met. Then select the one or more required conditions
4. Proxy: Yes or No - Determines if this notification is used for regular or proxy submissions.
5. Click + to add a row. If you select the Client option, you include or excludes specific Clients.
6. Under Notify, specify either individual email addresses or select employees from the Available employee selection box. External email addresses can also be included.
7. Under Message, enter the desired contents of the email to be delivered upon timesheet submission. Use the Field drop-down list to specify pre-set variables as part of the email. To do this, choose the variable from the drop-down list and click on **Paste** to insert the variable into the email body.
8. Click Save.

Other Settings

There are several other settings available in the Opportunities application.

To access the Opportunities Other settings:

1. Go to Administration > Application Settings > Opportunities Settings > Other settings.

Allow an approver to edit a submitted proposal: This feature, when selected, permits an approver to make adjustments to a Proposal after it has been submitted.

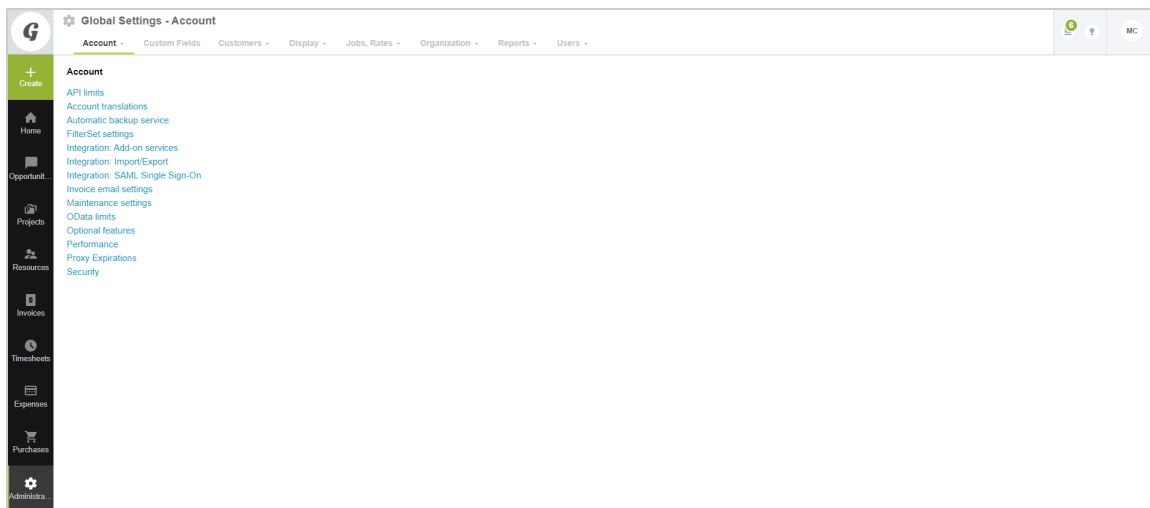
Allow a proposal to be associated with a deal: Enabling this feature lets you associate a proposal with a Deal. You first must have a Client or Prospect set up. Then a Deal has to be created in the Opportunities application. You can then create a Proposal and tie it to the specific deal.

Disable editing of sent proposals: If the Proposal has been marked as Sent to the Client or Prospect, this feature prevents editing the proposal within OpenAir.

Administration - Global Settings

Overview

The Administration > Global Settings application contains a majority of the configuration items within OpenAir, both for the system and for your specific employee accounts and clients. It divides settings into sections that include additional sub-tabs. Items configured in Global Settings are generally available to all employees of the system, depending on their Role, Form Permissions, and Filter Sets.



Global Settings are listed under the following sections:

- [Organization](#)
- [Users](#)
- [Jobs, Rates](#)
- [Clients](#)
- [Display](#)
- [Account](#)
- [Reports](#)
- [Custom Fields](#)

This chapter also includes [Form Permissions Overview](#) as form permissions apply to all forms in OpenAir.

Organization

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Organization. The following lists them in the order in which they display on the Global Settings window.

- [Accounting Dates](#)

- [Accounting Periods](#)
- [Approval Options](#)
- [Currencies](#)
- [Departments](#)
- [Hierarchy](#)
- [Name & Address](#)
- [Projects](#)
- [Tag Groups](#)
- [Tax Locations](#)
- [Tax Options](#)
- [Work Schedules](#)

Accounting Dates

Cancel
SAVE

▼ Timesheet accounting date

Event	Accounting date	
Timesheet is approved ▼	Custom accounting period => ▼	Select... ▼

▼ Time entry accounting date

Event	Accounting date	
Timesheet is approved ▼	Custom accounting period => ▼	Select... ▼

▼ Exp report accounting date

Event	Accounting date	
Exp report is approved ▼	Custom accounting period => ▼	Select... ▼

▼ Receipt accounting date

Event	Accounting date	
Exp report is approved ▼	Custom accounting period => ▼	Select... ▼

▼ Invoice accounting date

Event	Accounting date	
Invoice is approved ▼	Custom accounting period => ▼	Select... ▼

OpenAir provides a useful feature in allowing you to establish Accounting Dates for a variety of transactions. You can associate Accounting Dates with timesheets, time entries, expense reports, receipts, invoices, revenue containers, and recognition transactions as well as with reports drawing from these accounting dates. The ability to maintain separate accounting dates can be particularly helpful when the original transaction date of an entity must be independent from the financial accounting date, as signified by a financial report or general ledger application.

Accounting dates can be populated automatically at a particular time, such as transaction creation, and with a particular date.

Note: This is not an actual accounting period function as seen in a financial system. This feature permits transactions to be tagged with an additional date value to keep reporting consistent within a particular accounting period. Discuss this feature with a professional services consultant before deciding on whether this functionality is applicable in your account.

To enable accounting date functionality, [Creating a Support Case](#) and request that the following switch for accounting periods be enabled: Enable the accounting period feature to manage transaction dating (Support - Check with Sales before enabling).

To set up Accounting dates:

1. Go to Administration > Global Settings > Accounting dates.

The selections available in the drop-down lists for the Accounting date configuration vary according to the entity that is being set up. For each entity, select an event and then select an associated accounting date. For example:

- Timesheet events include: Timesheet created, Timesheet submitted, and Timesheet approved.
- Timesheet Accounting Dates include: Timesheet start date, Date timesheet is created, Date timesheet is submitted, Date timesheet is Approved, Custom date, and Custom Accounting period.

The drop-down values are similar to the above for time entries, expense reports, receipts, and invoices. These drop-down values are the events in the system that trigger the stamping on an accounting date onto the transactions. For example, when a Timesheet is submitted, the time entry is stamped with an accounting date of today's date.

After you select the settings and save the form, the accounting dates for the associated transactions are populated automatically according to the accounting date event and the chosen date. Any accounting date can be manually updated by editing the individual transaction and over-writing the accounting date.

Note: The automatic population of accounting date for charges and revenue recognition transactions can be set up within the billing and revenue recognition rules. See [Accounting Periods](#).

Accounting Periods

Cancel
SAVE
SAVE & CREATE ANOTHER

New accounting period

Name	Start (MM/DD/YY)	End (MM/DD/YY)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Transaction date <input checked="" type="radio"/> Use start date <input type="radio"/> Use end date <input type="radio"/> Use the following date (MM/DD/YY): <input type="text"/>	Notes <div></div>
--	-----------------------------

☒ Active
 ☐ Default accounting period
The default accounting period is '2011:05'

The accounting period functionality lets you associate separate accounting dates with most transactions as well as with reports drawing from these accounting dates. The ability to maintain separate accounting dates can be particularly helpful when the original transaction date of an entity must be independent from the date, as signified by a financial report or general ledger application.

Review the following examples:

- Charges on an invoice dated July 5th need to be associated with the month of June in the general ledger since the charges were incurred in this month. In this example, the invoice transaction date would be 07/05/12, however, the invoice accounting date might be 06/01/12.
- A receipt incurred in March needs to be posted to the financial system in June. In this example, the receipt transaction date might be 03/17/12, while the receipt's accounting date might be 06/01/12.

The accounting period functionality lets you associate an additional independent accounting date with a transaction. You can then configure reports to leverage the accounting dates, rather than the original transaction dates. The accounting date functionality is enabled with the accounting period functionality.

To enable this functionality, [Creating a Support Case](#) and request that the following switch be enabled: Enable the accounting period feature to manage transaction dating (Support - Check with Sales before enabling). After you have activated the accounting period functionality, the following transactions have an acct_date field available:

- Invoices
- Charges
- Expense reports
- Receipts
- Timesheets
- Time entries
- Revenue recognition transactions
- Agreements
- Client PO's
- Fulfillments
- Purchase items
- Purchase Orders

To create an Accounting period:

1. Go to Administration > Global Setting > Organization > Accounting periods.
2. Select **New Accounting period** from the **Create Button**.
3. Name the accounting period (Ex: P1 November 2012).
4. Select the start and end date for this period (Ex: 11/01/12 and 11/15/12).
5. Select the Transaction date for this period. This is the date that displays in the accounting date field when a transaction is created and associated manually or automatically with this Accounting Period.
6. Add any relevant notes to the Notes field that may be helpful. (For example, you might type, "This is the first of two accounting periods in November 2012.")
7. Select the **Active** check box, unless the accounting period does not need to be active at the moment. (Inactive accounting periods do not show up in drop-down lists for association with transactions).

8. Select the **Current accounting period** check box to which the accounting period should be referenced if and when the current accounting period is selected in any billing or revenue recognition rules setups.
9. Click Save.

To auto-populate Accounting Dates charges via Project Billing rules:

1. Go to Projects and select a project. Navigate to Billing > Billing rules.
2. Drill into the billing rules. Under the Accounting date setup, **How to get the accounting date field**. Select either:
 - Use the accounting date specified below
If this is selected, the **Accounting date** field must be populated with a specific transaction date.
OR
 - Use the accounting period specified below
If this is selected, the Accounting period drop-down listed below must be populated with a specific accounting period, or more commonly, the dynamic current accounting period selection. If you select the current accounting period, the accounting period that has the **Current accounting period** check box selected is used.
3. Click Save.
The next time the billing rule is run, charges generated have the Accounting date populated according to the Accounting Period setup within the rule.

To update the Accounting Dates on charges:

1. Go to Projects and select a project. Navigate to Billing > Billing rules.
2. To update the accounting date one charge at a time, drill into a charge and manually update the accounting date field.
3. To update the accounting date on charges in bulk, navigate to the open charges tab within the Invoices application. Select the check boxes next to the charges that need to be updated, click the run-an-action icon, select **Change the Accounting Date to** and select the appropriate accounting period.
4. Click OK.



Note: Access to the accounting dates is controlled by an employee's application role and can be hidden on forms using form permissions. See [Form Permissions Overview](#).

To auto-populate Accounting Dates on Revenue Recognition Transactions via Revenue Recognition rules:

1. Go to Projects and select a project. Navigate to Recognition > Recognition rules.
2. Drill into the revenue recognition rules. Under the Accounting date setup, designate How to get the accounting date field. Select either:
 - Use the accounting date specified below
If this is selected, the **Accounting date** field must be populated immediately below with a specific transaction date.
OR
 - Use the accounting period specified below
If this is selected, the Accounting period drop-down immediately below must be populated with a specific accounting period, or more commonly, the dynamic Current accounting period

selection. If the current accounting period selection is picked, the accounting period that has the **Current accounting period** check box selected is used.

3. Click Save.
The next time revenue recognition is run, these updated rules create revenue recognition transactions that have the Accounting date populated according to the Accounting Period setup within the rule.

To update the Accounting Dates on revenue recognition transactions:

1. Go to Projects and select a project. Navigate to Recognition > Recognition rules.
2. To update the accounting date on one revenue recognition transaction, drill into a revenue recognition transaction and manually update the accounting date field.
3. To update the accounting date on revenue recognition dates in bulk across a project, drill into a project and navigate to the revenue recognition transactions tab. Select the check boxes next to the charges that need to be updated, click the run-an-action icon, select **Change the Accounting Date to** and select the appropriate accounting period. Click OK.

Updating Accounting Dates Automatically

You can update an accounting date manually, or arrange to have the accounting date automatically populated at a particular time. See [Accounting Dates](#).

This applies to the following:

- Timesheets
- Time entries
- Expense reports
- Receipts
- Invoices
- Revenue containers
- Recognition transactions

Approval Options

You can configure OpenAir to require approval for certain type of transactions before these transactions can be processed.

Approval is available for the following record types:

- Expenses: Expense reports, Expense authorizations.
- Invoices: Invoices, Credit invoices, Rebill invoices.
- Opportunities: Proposals.
- Projects: Bookings, Project budgets.
- Purchases: Purchase requests, POs.
- Resources: Bookings, Booking requests, Resource profile (optional feature)
- Timesheets: Timesheets, Time off requests.

You can select who approves transactions depending on the type of transaction at different levels:

- Employee level (Administration > Users > Employees > [Select an employee] > Demographic).
- Department level (Administration > Organization > Departments > [Select a department] > Approvals) — You can use this to control employee level approval settings for each employees in the department from the same page.
- Project level (Projects > Projects > [Select a project] > Properties).



Important: When project level approvals are enabled and set for the project associated with the transaction to be approved, transactions submitted for approval are routed according to both project level and employee level approval settings. Transactions submitted for approval are routed according to the project level approval settings first, and routed according to the employee level settings after the project level approvals are obtained.

Approval can be routed to:

- A named employee.
- A dynamic value (metavalue) — The approval is routed to an employee determined automatically based on the project or the employee associated with the transaction to be approved.
Examples of metavalues include:
 - [Project owner] — Approvals are routed to the employee who owns the project associated with the transaction to be approved.
 - [Manager] — Approvals are routed to the manager of the employee who owns the transaction to be approved.
- An approval process — Approval processes let you define multiple levels of approval required before transactions can be processed. For each level of approval, you can set the approver to a named employee or a dynamic value, set an alternative approver to avoid self-approval, and configure automatic escalation to ensure that transactions progress through the approval process. See [Approval Processes](#).

Currencies

Currencies Overview

OpenAir supports multiple currencies.

All OpenAir accounts include the capability to create expense receipts in any of the system-supported currencies even if all your business transactions are done in the default currency for your account. Account administrators can:


- Set the default currency for the account.
- View the list of supported currencies, including the market exchange rates for these currencies (updated daily). See [Viewing Exchange Rates](#).
- Override market exchange rates with company exchange rates. See [Setting Company Exchange Rates](#).

If your business uses more than one currency for transactions, you can enable the Multicurrency feature. The Multicurrency feature provides support for transactions in currencies other than your default currency. For example, the feature lets you reimburse employees expenses, invoice clients, recognize revenue, and run reports in multiple currencies. After you enable the feature, you can:


- Set the different currencies your company uses for transactions. See [Enabling Multiple Currencies in OpenAir](#)
- Set a **Currency** for all relevant entity records and work with multiple currencies in OpenAir.
- Download historical currency cross rates as a CSV file.

Additional optional features also give you access to advanced multicurrency functionality, for example:

- The ability to modify historical currency cross rates.

 **Note:** This feature requires the Edit Exchange Cross rates optional feature to be enabled for your account, in addition to the Multicurrency feature.

- The ability to define arbitrary custom currencies for reporting purposes.

 **Note:** This feature requires the User-Defined Reporting Currencies optional feature to be enabled for your account.

To enable the Multicurrency feature and discuss advanced multicurrency functionality, contact your OpenAir account manager or your OpenAir Professional Services representative. You cannot disable the feature after you create transactions and records that rely upon it.

Viewing Exchange Rates

To view the exchange rates for all system-supported currencies, go to Administration > Global settings > Organization > Currencies > View exchange rates.

The Exchange rates list view includes the following information for each currency available in OpenAir:

- **Currency** — The name of the currency.
- **Symbol** — The three-letter currency code as per the [ISO 4217](#) code list.
- **Market rate** — Current market value of the currency against the selected base currency. To select the foreign exchange rate base currency, go to Administration > Global settings > Organization > Currencies > Set exchange rates.

Note: Market foreign exchange rates are updated daily using a data feed from [Xignite](#) around 3:00 a.m. Eastern Time (UTC – 5).
To find the exact foreign exchange rates update schedule for your account, export your OpenAir data and include the alert table. The table shows all alert triggers configured for your account. Look for trigger_hour and trigger_minute values in the row with the type value multi_currency.

- **Company rate** — OpenAir lets you override the market foreign exchange rate value with a company rate. The company rate is used for all transactions and reports if it is set. The market rate is used otherwise. See [Setting Company Exchange Rates](#).

Currencies

Set exchange rates

View exchange rates

Multi-currency

Exchange Rates (United States Dollars)

↑ Currency	Symbol	Market Rate	Company
Albania Leke	ALL	110.62000	
Algeria Dinars	DZD	76.98350	
Angola Kwanza	AOA	94.81896	
Argentina Pesos	ARS	4.48370	
Armenia Drams	AMD	408.39000	
Australia Dollars	AUD	1.00860	
Azerbaijan Manats	AZM	4,354.50000	
Azerbaijan New Manats	AZN	0.78620	
Bahamas Dollars	BSD	0.99384	
Bahrain Dinars	BHD	0.37676	
Bangladesh Taka	BDT	81.37250	
Barbados Dollars	BBD	1.97699	
Belarus Rubles	BYR	8,328.89990	

119 rows

Setting Company Exchange Rates

OpenAir lets you override the market foreign exchange rate value with a company rate for each currency. The company rate is used for all transactions and reports if it is set. The market rate is used otherwise.

To change the base currency for foreign exchange rates or enter company exchange rates, go to Administration > Global settings > Organization > Currencies > Set exchange rates.

- To change the base currency for foreign exchange rates, select a currency from the **Base exchange rates on** dropdown list.

- To set a company exchange rate for a currency, locate the currency on the form and enter the exchange rate value against the selected base currency in the box next to the currency name and code.
- Click **Save** to save any changes made on the Set exchange rates form.

After you set a company exchange rate, it appears on the Exchange rate list view. See [Viewing Exchange Rates](#)

Name	Company Rate	Name	Company Rate
Albania Leke (ALL)	<input type="text"/>	Lebanon Pounds (LBP)	<input type="text"/>
Algeria Dinars (DZD)	<input type="text"/>	Libya Dinars (LYD)	<input type="text"/>
Angola Kwanza (AOA)	<input type="text"/>	Lithuania Litai (LTL)	<input type="text"/>
Argentina Pesos (ARS)	<input type="text"/>	Macao Patacas (MOP)	<input type="text"/>

Enabling Multiple Currencies in OpenAir

If your business uses more than one currency for transactions, you can configure OpenAir to support transactions in currencies other than your default currency. For example, the feature lets you reimburse employees expenses, invoice clients, recognize revenue, and run reports in multiple currencies. After you enable multiple currencies, you can set a **Currency** for all relevant entity records, include monetary fields for each configured currency in reports, and work with multiple currencies in OpenAir.

Note: The Multicurrency feature is not required to create expense receipts in any of the system-supported currencies. If all your business transactions are done in the default currency for your account, you do not need to enable the Multicurrency feature. You cannot disable the feature after you create transactions and records that rely upon it.

To enable multiple currencies in OpenAir:

1. Contact your OpenAir Account Manager or OpenAir Customer Support and request the Multicurrency feature.
2. Go to Administration > Global Settings > Organization > Currencies > Multi-currency.
3. Select the currencies your company conducts business transactions in. The first currency you select at the top of the form is your default currency. To add more rows, click the [Add rows] dropdown and select the number of rows you need to add.
4. Click **Save**.

Currencies

Set exchange rates View exchange rates **Multi-currency**

Cancel **SAVE**

Select currencies available:

United States Dollars (USD)	▼	Default
British Pounds (GBP)	▼	
Canada Dollars (CAD)	▼	
Australia Dollars (AUD)	▼	
Euro (EUR)	▼	
Select...	▼	
Select...	▼	
Select...	▼	

[Add rows] ▼

Departments

New department

Department name

Notes

^
v

Cancel **SAVE** **SAVE & CREATE ANOTHER**

Departments function as groupings of employees based on distinct criteria. The criteria can be defined based on your company's requirements. You can also use Departments to grant group access privileges and create customized approval procedures.

To create Departments:

1. Go to Administration > Global Settings> Departments. Select **New Department** from the **Create Button**.
2. Type the Department name.
3. Add Notes as applicable.
4. Click Save.

After the Department is created and saved, additional options display. They include:

- **Assigned employees** — The Assigned employees option is where you can now assign employees to the department. A employee can only belong to one department. Employees available to be assigned

display in the Available Items area. If an employee is not listed in the Available Items, then they have already been assigned to another department. You must unassign the employee from the old department before you can assign them to the new department. After all employees are assigned in the Selected Items area, save the form.

- **Edit** — After employees are assigned, you can Edit the Department form and add the Department head if applicable. The Department head must be an active employee and must be a member of the department.

Note: Click the link to Modify the form permissions to display a message area. If departmental dashboards are active in your account, you can enter messages or notifications that are posted on the departmental dashboard when employees login to OpenAir. Only members of the department are able to view these messages.

- **Approvals** — Approvals allow you to set each employee's approver by function. The functions listed include: Timesheets Approver, Expenses Approver, Authorizations Approver, Proposal Approver, Purchase Request Approver, and PO Approver, provided these functions are enabled in your OpenAir environment. You can assign mass approvers to the department head, to a generic such as Manager or to an approval process. You can also choose named approvers by employee by function. After approvers have been assigned, save the form.

Note: Approvers can also be assigned at the Employee level when a Employee is created or modified.

Hierarchy

The screenshot shows a 'New hierarchy' form with the following elements:

- Buttons: 'Cancel' and 'SAVE'.
- Section: 'New hierarchy'.
- Field: 'Hierarchy name' (text input).
- Field: 'Type' (dropdown menu with 'Select...' and a downward arrow).
- Text: 'Select what type of hierarchy you want to create'.
- Field: 'Notes' (text area with a vertical scrollbar).
- Checkbox: ☒ 'Active hierarchy'.
- Checkbox: ☐ 'Show this hierarchy when editing objects of this type'.
- Checkbox: ☐ 'Require a hierarchy selection when editing objects of this type'.
- Field: 'Duplicate levels and nodes from this hierarchy' (dropdown menu with 'Select...' and a downward arrow).
- Text: 'Nodes will be empty'.

Hierarchies are used to create hierarchal classification trees with employees, clients, and projects. A employee, project, and client can only belong to one node at any particular moment within a hierarchy, but can belong to multiple hierarchies at one time if multiple hierarchies exist for a record. A employee project, and client can also be moved between nodes with a hierarchy.

Hierarchies are used for subtotaling and filtering within Summary reports. For example, you may create a client hierarchy based on geographical location that associates each client with an office location such as a city. You could also create a two level hierarchy: city and state. Each level may have multiple nodes. The state level can have Texas, Georgia, and Washington. Or, at the city level you could have Seattle, Austin,

Dallas, and Atlanta. Each city level node has a parent node such as a state. By assigning clients to a city, they are automatically also associated with the state.

To create Hierarchies:

1. Go to Administration > Global Settings> Hierarchies. Select **New Hierarchy** from the **Create Button**.
2. Enter the Hierarchy name and select the Type. Associate the hierarchy with either Employee, Project, or Client.
3. Add Notes about this hierarchy, if desired.
4. OpenAir defaults the hierarchy to Active hierarchy status.
5. Check the **Show this Hierarchy when editing objects of this type** to make the field visible on the entity form.
6. Check the **Require a hierarchy selection when editing objects of this type** to make this field required.
7. You can duplicate levels and nodes of another hierarchy if this feature has been enable for your account. However, the nodes will be empty.
8. Save the form. A new check box displays to **Enable this hierarchy as a column in entity lists**. This checkbox lets you add the hierarchy to customized lists of data.

After you create a Hierarchy, then you create corresponding Levels and Nodes. When the hierarchy form has been saved, links to the Levels, Nodes and Entity (Clients, Projects or Employees) display on the Edit hierarchy form.

To create Levels:

1. Click on Levels link. Select New > Level.
2. Enter the Hierarchy level name. If this level is the topmost level, then no Parent is required. For all other levels below the topmost level, a parent is required.



Note: There can be only one topmost level for each hierarchy. If you do not select a parent for a level, the system automatically places it as the topmost level and it becomes the parent of the previously topmost level.

3. Add Notes about this hierarchy, if desired.
4. Click Save.

You create Nodes in a similar manner to Levels, as described above. You cannot create Nodes until you have created Levels.

To create Nodes:

1. Click on Nodes link. Select New > Node.
2. Enter the Hierarchy node name and select the Parent the level to which it belongs.



Note: There can be multiple Nodes at each level. When you create your Nodes, you can assign clients, projects, and employees to the nodes.

3. Click Save.

You are able to see a list of entities associated with the hierarchy. If a Project hierarchy is created:

- On the Edit hierarchy form, select the **Use to determine filter set access for projects** check box if you want to use it in filter sets. This feature lets an employee have project access based on placement within a project hierarchy. See [Filter Set Access Control](#).
- On the Edit project form, specify the node of the hierarchy in which the project belongs.
- On the Employee Demographic form, select which group of projects the employee has the right to use by picking the appropriate node or level of the hierarchy.

Note: Clients, projects, or employees can only belong to one node in each hierarchy. Therefore, it is useful to assign them to the most specific node. When you run reports, the employee, client, or project are automatically rolled-up into the higher level parent nodes.

Name & Address

Cancel SAVE

Company ID
The ID is the Company ID you use to log in

Company name

Address

City

State/Province ZIP/Postal Code

Country

Company phone Company fax

The Name and Address link displays the Company information form. This is where you enter company information such as name, address, phone number as contracted with OpenAir for billing purposes. The key field here is the Company ID, which is required to identify your company's instance during login to the OpenAir application. The Company ID may be changed if, for example, your company undergoes a name change.

To create or edit Company information:

1. Go to Administration > Global Settings> Name & address.

Note: All active employees in your OpenAir account receive an email if the Company ID field is changed. This is a critical piece of information for accessing OpenAir. If changes are made to the other company information fields, no email notifications are sent to the system employees.

Projects

The screenshot shows the 'New project' form with the following fields and controls:

- Buttons:** Cancel, SAVE, SAVE & CREATE ANOTHER
- Project name ***: Text input field.
- Client ***: Dropdown menu with 'Select...' and a search icon.
- Project manager**: Dropdown menu with 'Select...' and a search icon.
- Project stage**: Dropdown menu with 'Active'.
- Start date (MM/DD/YY) ***: Date picker showing '10/22/13'.
- Budget (hours)**: Text input field.
- Budget (money)**: Text input field.
- Currency**: Dropdown menu with 'USD'.
- Cost center**: Dropdown menu with '01-Boston'.
- Customer POs**: Link to '> Create'.
- Notes**: Text area with an upward arrow.
- Associated workspace:** Dropdown menu with 'None'.
- Footer:** Create associated workspace duplicating the folder structure

The Project form requires only a few fields to create a project: Project Name, Client, and Start date. However, it lets you capture pertinent project information such as the following.

- **Project name** — The project name should be descriptive but short to preserve space on page displays and on reports.
- **Project owner** — The Project Owner drop-down can be set to the resource responsible for the information accuracy tracked on the project. This field setting has special use related to approval processes and reporting filters.
- **Project stage** — Remember, project stages must have been previously defined to be available for selection here. See [Project Stages](#).
- **Start date** — The Start date is defaulted to today's date and, in most cases, signifies when the project is estimated to start.
- **Budget hours** — Indicates the effort estimated to complete the project activity. When budget hours is set, the budget alert feature within the projects application may be used to notify project owners when work expended on a project is within a defined threshold of the project budget.
- **Budget money** — The Budget money is where the contract value is typically entered. It is in the same currency set on the project.
- **Currency** — The currency displayed is the system default, but may be overridden to be any defined currency within the system. The billing rule currency defaults to the currency set on the project.
- **Billing code** — The Billing code is a free-text 2 digit field that may be used in the Invoices application for batch creation of invoice per billing code. Values set in the billing code field are not defined within OpenAir and should be set according to policy within your company, if used.

- **Invoice layout** — The Invoice Layout dropdown displays if you have defined invoice layouts in the invoices application. The default value is Default invoice layout, which is also set within the Invoice application options. Overriding the invoice layout value will define which invoice layout should be used when an invoice is generated for the project.
- **Agreements or client POs** — If the client has Agreements and Client POs entered in the system, an agreement and client PO field is available allowing you to associate these entities with the project. Associating an Agreement or Client PO with the project permits these items to be available for inclusion on billing rules, which will provide automatic balance tracking in OpenAir.


 **Note:** You can also create and edit project information in the Projects application. See [Projects](#).

Tag Groups

Cancel
SAVE
SAVE & CREATE ANOTHER


New tag group




Entity type


User 

Name

☒ Active tag group
 ☒ Searchable tag group
Enables the ability to search for users by this tag group in the Staffings module

 **Tag group attributes**

Name	Active	Usage count	Delete?
	<input type="checkbox"/>		 <input type="checkbox"/>
	<input type="checkbox"/>		 <input type="checkbox"/>
	<input type="checkbox"/>		 <input type="checkbox"/>

[Add rows]


The Tag group functionality lets you create specific subgroupings of items in OpenAir such as a subgroup of employees. This is useful if you need to report on a group of items that is a subset or may cross a number of values in a particular entity. For example, using the Department may be too large of a group for your particular need and the tag group is able to pare down the selection. Or, you may want to classify the Consultants role into their area of expertise to report on the utilization for each of these subgroupings. For example, Financials or CRM consultants may cross organizational department and boundaries.

The difference between a tag group versus a custom field is that the tag group lets you track the changes in historical values. A custom field only shows and reports on the current value in the system, whereas an employee's change in tag group values are represented throughout any time range in reporting.

To create Tag groups:

1. Go to Administration > Global Settings > Tag group.
2. Select **New Tag group** from the **Create Button**.
3. Select Entity type. This is always Employee.

4. Enter the Name of the tag group and choose whether you would like this tag group to be searchable in the Resources application.
5. Enter Tag group attributes for this group. For example, if you decide to have a tag group for city, attributes may be values such as Chicago, New York, Dallas, and San Francisco.
6. Select the **Active** check box to indicate which attributes are active.
7. Click Save.

Tax Locations

Cancel
SAVE
SAVE & CREATE ANOTHER

New tax location

Tax location name

Tax rates

☒ Federal % State %
☐ GST % PST %
☐ PST %

Accounting codes

Federal transactions	State transactions
<input type="text"/>	<input type="text"/>
GST transactions	PST transactions
<input type="text"/>	<input type="text"/>
PST transactions	
<input type="text"/>	

Optional terminology

Federal tax terminology on POs	State tax terminology on POs
<input type="text"/>	<input type="text"/>
GST tax terminology on POs	PST tax terminology on POs
<input type="text"/>	<input type="text"/>
PST tax terminology on POs	
<input type="text"/>	

Other

Notes

☐ Include GST in PST calculation

☒ Active tax location

Multiple tax locations can be established to handle sophisticated tax requirements. Tax locations allow for complex tax requirements.

Tax locations include:

- US federal and states taxes

- GST Goods and Services Tax (Canada, Australia)
- VAT (Europe, and other countries)
- PST (Provincial Sales Tax - Canada)
- HST (Harmonized Sales Tax - Canada)

To create Tax Locations:

1. Go to Administration > Global Settings > Tax locations.
2. Select **New Tax location** from the **Create Button**.
3. Enter the Tax location name.
4. Select Tax rates for the type of tax and enter percentage amounts.
5. Type the Accounting code for each tax rate.
6. Type Optional terminology that displays on POs.
7. Add Notes, if desired.
8. Select the check box for **Include GST in PST calculation** if you want the GST to be added to the total before the PST percentage is applied.
9. Click Save.

After creating Tax locations, a Tax Location drop-down list is available within the following entities: Projects, Clients, and Employees.

To apply the taxes to an invoice, you must associate the appropriate Tax Location with the project.

When setting up an expense billing rule, the GST and HST tax amounts can be backed out if they are not application to be billed back to the client.

Frequently Asked Questions (FAQs)

There are a number of tax options here such as Federal, State, and GST. How do I know which ones to set up?

This can be simple or very complex depending on where your company and clients are located. We suggest contacting your company's Tax Accounting or Finance Department for guidance on which tax rate options should be set up in the system.

Even if I have the proper tax rates set up in the system, how can I make sure that they are applied properly on the invoices?

As mentioned above, taxation action items can be complex. Invoicing Clients should be controlled by your company's Accounting or Billing department. Taxation details are usually contained in the contract or statement of work with the client.

Tax Options

Cancel SAVE

Tax Options

Tax calculation method

Tax rate by expense item and service ▼

☐ Enable tax locations on receipts

Tax Options provide the ability to select and create various taxation scenarios within OpenAir. These are available in the Invoices and Expenses applications.

To create or edit Tax options:

1. Go to Administration > Global Settings > Tax options.
2. Select the Tax calculation method. Three main methods exist for tax calculation.
 - **Tax locations** — allow the creation of individual tax settings, which consider taxation on a geographic basis. See [Tax Locations](#).
 - **Tax rate by expense item and service** — permits the tax settings, which are based on individual expense items and services, to be applied when generating client billings. See [Expense Items](#) in Expenses Settings and [Expense Items](#) and [Service](#) in Invoices Settings.
 - **Federal/State tax by project and vendor** — permits the entry of a tax location/rate directly on a project or vendor, which will be applied to client billings.
3. Check the **Enable tax locations on receipts** box.
4. Click **Save**.

Enable tax locations on receipts — By default, taxes may be handled on invoices and taxable information will be computed based on associated services with timesheet hours, i.e., the service is set up as taxable.

Expense Items and Products may also be set up as taxable. The tax calculation is applied based on the tax location set on the project, which is passed to the invoice, or set directly on the invoice. Optionally, receipts within an expense report may have unique taxes related to the location of where the expense was incurred. Select this option to display the tax location field on receipts for the entry of specific tax handling.


Other considerations when selecting this option are as follows:

- When you rebill expenses, do you remove the tax amount of the location where the expense was incurred and apply a standard tax rate, an option on the expense billing rule?
- Do you apply taxes in addition to the taxes captured for the receipt?
- Do you pass taxes directly through to the client?

Work Schedules

Work Schedules define the work week within your company. You may create multiple calendars to define different work weeks. For example, you might define part-time schedules or work week hour variations might need to be addressed in different regions of your company. See [Creating and Editing Company Work Schedules](#).

If work schedule time ranges are enabled, you can define start times for each day of the week. See [Optional Features](#).

 **Note:** You need to enable work schedule time ranges and ensure that employees work schedules include start times to create bookings with start and end times for these employees, see [Frequently Asked Questions \(FAQs\)](#) under the Resources chapter.

You can also enter schedule exceptions for each work schedules. Work schedule exceptions can be created for public holidays, closure periods recognized or any other days, part-days or periods recognized

by your company as non-working time. For each exception, enter a description, for example the name of the holiday, the start and end dates of the exception, and enter 0 hours for the work day definition.

Company work schedules can be associated with individual employees by setting the employee's **Schedule** link to the desired company schedule. Employees associated with the work schedule are not available for work on the days specified in the work schedule exceptions. If you have selected timesheet options to display schedule exceptions on the timesheet, then the company holidays entered on the work schedule are displayed on the employee's timesheet based on the schedule associated with the employee's account.

There are various configurations available on work schedules that allow for options such as a flexible-time schedule. Contact OpenAir Customer Support or your Professional Services Consultant to discuss these options.

Work schedule

Cancel

Save

Company work schedule name*

Australia work schedule

☐ Make this the default company work schedule
Current default company work schedule is: US work schedule

Available work days for this company work schedule

☒ Monday
 ☒ Tuesday
 ☒ Wednesday
 ☒ Thursday
 ☒ Friday
 ☐ Saturday
 ☐ Sunday

Work hours per day for this company work schedule

8

► Daily work hours

Description	Default start time	Mon	Tues	Wed	Thur	Fri	Default
All day	09:00AM						<input type="checkbox"/>
Afternoon only	01:00PM						<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>

[Add rows] ▼

▼ Exceptions to Australia work schedule work schedule

These company exceptions apply to all employee schedules associated with this company work schedule.
 By entering a zero for 'Hours to work per day' below, you are indicating that the employees in the company are not scheduled to work at all during that exception timeframe. This would be the case for a vacation or holiday for example.

Delete?	Description	Start date (YY-Month-DD)	End date (YY-Month-DD)	Hours to work per day*	Reason (time type)
<input type="checkbox"/>	New Year's Day 2010	10-Jan-01	10-Jan-01	0	Non-billable ▼
<input type="checkbox"/>	Australia Day 2010	10-Jan-26	10-Jan-26	0	Non-billable ▼
<input type="checkbox"/>	Good Friday 2010	10-Apr-23	10-Apr-23	0	Non-billable ▼
<input type="checkbox"/>	Easter Monday 2010	10-Apr-26	10-Apr-26	0	Non-billable ▼
<input type="checkbox"/>	Anzac Day 2010	10-Apr-27	10-Apr-27	0	Non-billable ▼
<input type="checkbox"/>	Queen's Birthday 2010	10-Jun-14	10-Jun-14	0	Non-billable ▼

Creating and Editing Company Work Schedules

You may create multiple calendars to define different work weeks.

To create or edit work schedules:

1. Go to Administration > Global Settings > Organization > Work schedules.

2. Do one of the following:
 - Select a work schedule to edit it.
 - Click the **Create** button then **New work schedule**.

The work schedule form appears.
3. If you are creating a new schedule, enter a **Company work schedule name**.
4. Check the **Make this the default company work schedule** box if you want this work schedule to be associated to all new employees by default.
5. Check the boxes for each working day of the week according to your company's work schedule.
6. Enter the **Work hours per day for this company work schedule**.
7. If work schedule time ranges are enabled for your account, you can define different set of **Daily work hours**. For each set:
 - a. Enter either a **Default start time** or a start time for each working day of the week. The end time is set based on the number of hours for that day.
 - b. Enter a **Description**.
 - c. To make this set the default daily work hours for employees associated with the company work schedule, check the **Default** box.
8. Add any exceptions to the company work schedule. Exceptions can be used to enter public holidays and any period of company closure for example. These exceptions apply to all employee schedules associated with the company work schedule.
9. Click **Save**.

Frequently Asked Questions (FAQs)

How do I input my company holidays into the work schedule?

Company holidays and other days where all employees will not be working are entered under the Exceptions to Account workschedule work schedule section of the Work Schedule form. Remember, you can have multiple work schedules based on different countries, regions, states, etc. For each work schedule, enter the Description, which is the holiday name, Start date, End date, Hours to work per day (enter 0 if full day off, or other value depending on the situation), and select a Reason (time type) if these exist in your environment.



Note: Always add the next year's holidays after the current year's entries. This will keep all calendars consistent with the appropriate exception data.

Users

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Employees. The following lists them in the order in which they display on the Global Settings window. We provide an overview for some of the more complex areas of the system.

- [Filter Sets Overview](#)
- [Guest Roles](#)

- [Guests](#)
- [Roles Overview](#)
- [Employee Locations](#)
- [Employees Overview](#)

Filter Sets Overview

Filter sets function to provide access privileges to employees based on their role in the organization. Filter sets can limit access to the following items: Clients, Projects, Services, Employees, Expense Items, Charge stages, and Project stages. Filter sets are a powerful tool to allow employees to see the same entities, but customize the data that is accessible. They limit what data an employee can see within the system.

Cancel SAVE

New filter set

Filter set name

Notes

☐ Make this the default filter set for new and imported employees
The current default filter set is Booked/Assigned

Duplicate access control settings from this filter set

Select... ▼

To create Filter sets:

1. Go to Administration > Global Settings > Filter sets.
2. Select **New Filter set** from the **Create Button**.
3. Enter the Filter set name, Notes and check the Make this the default filter set for new and imported employees (if applicable).
4. Click Save.
5. After the Filter Set has been created and saved, additional options display. The following three links are available and are described in the sections that follow:
 - **General** — the Name and Notes about the filter set
 - **Employee filter set** — identifies who has this filter set assigned to them in the Filter Set link of the employee record
 - **Access Control**— identifies what types of data employees with this filter set can view

Filter Set Access Control

Filter sets All Access	
General	Employee filter set Access Control
<div> <div>Access control type</div> <div>Status</div> </div>	
Client access	Access to all Clients
Project access	Access to all Projects
Project stage access	Access to all Project stages
Service access	Access to all Services
Employee access	Access to all Employees
Expense item access	Access to all Expense items
Time type access	Access to all Time types
Charge stage access	Access to all Charge stages
Booking type access	Access to all Booking types
9 rows	

Access Control defines the level of access that is granted to the assigned employees. Access Control can be set for the following items: Clients, Projects, Project stages, Services, Employees, Expense Items, Charge stages, and Booking types. The filter sets provide the access relationship of those items to a specific employee via discrete selections or with a meta value relationship description. For example, employees may have access to Project XYZ or to all projects they directly own.

To view and/or modify the Access Control for a filter set:

1. Go to Administration > Global Settings > Filter sets. Click on a filter set Name and select the Access Control link.
2. To modify Access Control, select which Access control type you would like to modify for this filter set.
3. Include or exclude items by adding or removing the items from the Available or Selected areas, respectively.
4. Click Save.

Employee Filter Set

Filter sets

All Access

General **Employee filter set** Access Control

Employees with access to this filter set

Available	Selected
Adams, Mary Admin, Jim Carr, Bill Carter, Tom [*] Collins, Marc [*] Davis, Judy Ellis, Ed [*] Foster, Tim Fox, Rebecca Garcia, Juan	Admin, Jim Carter, Tom [*] Collins, Marc [*] Ellis, Ed [*]

[Add selected >](#) [< Remove selected](#)
[Add all >](#) [< Remove all](#)

After the filter set has been created, you can choose which employees will have this filter set available to be added to their employee record. It is added to the Filter sets link within the employee record. Employees with an asterisk (*) after their name cannot be removed from the assignment as this is the only filter set in their account, which is the primary filter set. Employees must have at least 1 filter set assigned to their employee record. Employees with more than 1 filter set are allowed to switch filter sets to view different types of data. See [Change Filter set](#).

Client/Project/Project Stages

Filter sets

Owned Projects

General Employee filter set **Access Control**

Access control type	Status
Client access	Access to all Clients
Project access	Access to: [Access to owned Projects] [Access to booked Projects] [Access to assigned Projects]
Project stage access	No access to: [No Project stage] Closed

Filter sets can limit the view of clients, projects and project stages. For example, you could set a project manager filter set to be able to access only owned projects, booked projects, or assigned projects as well as only projects in a certain project stage.

Expense Items/Booking Types/Charge Stages

Filter Sets can limit the view of Expense Items, Booking Types and Charge Stages. For example, you could prevent an employee from accessing the Miscellaneous Expenses item or the Overage charge stage by modifying the filter sets.

Employees/Services/Time Types

Filter sets can limit the view of employees, services, and time types. For example, you could set an employee filter set to be able to access only their own timesheets or choose only internal time types on their timesheet.

Primary Filter Sets Application Overrides Switching Filter Sets

If an employee is assigned to more than one Filter set, the employee can select which one is currently active by using either of the following paths depending on their Employee setup configuration.

To select a Filter set as active:

1. Go to Dashboard > Change Filter set. Choose the filter set to change designate as active. See [Change Filter set](#).
2. Or, go to Employees and select a Employee ID. On the Employee Demographic form, scroll down the Primary filter set field and select the desired value. See [Demographic](#).

Note: This is only available if a Employee is assigned to more than one filter set. Please also note that an employee must be assigned to at least one filter set at all times or you are not able to save the Employee Demographic form.

To assign multiple filter sets at the Employee level:

1. Go to Employees and select a Employee ID. On the Employee demographic form, scroll down the Filter set module overrides. Use the create or edit link to add or remove filter sets for the employee record.

Note: If you are using the Filter set module overrides, changing the primary filter set does not impact the application overrides, unless the override setting is Active filter set.

Frequently Asked Questions (FAQs)

Why would an employee have more than one filter set assigned to them?

There may be instances where an employee is actually playing two or more role in the company. For example, a manager may be primarily responsible for the Eastern Region. But due to a vacancy in the company, they may also need to take over the responsibility for the Central Region. Using filter sets would allow the manager to view each of the regions individually. Remember that filter sets are what data the employee has access to in the system.

Administrators and users with a “All Access filter” set can experience slow performance in accounts with very large amounts of data, especially when loading lists. Assigning multiple filter sets allows these users to change the active filter sets to view only the data they need. List views will load quicker if the filter set combination returns significantly less data than the “All Access” option.

Can I delete a filter set?

You cannot delete a filter set if there are employees assigned to it. To delete a filter set, you must remove all assigned employees first. You can run a detail report for the filter set which can show what employees are assigned to it. You can delete the filter set when no employees are assigned to it.

When considering the Access Control in filter sets, we recommend that you think about leveraging the meta value relationships as much as possible. The values provided in employee and project access are the discrete lists of all the employees and projects in your system. This can be cumbersome to manage. Therefore, meta value relationships are recommended.

For example, typical employee access is that managers need to see their direct reports. If you assign the meta value **Access to Managed Employees**, it automatically lets the employee see all direct reports who have that employee as their manager in the system.

Guest Roles

Guests are clients who are able to log in to OpenAir and view the application data that is associated with them. Guest settings include the following: Guest can view Project Gantt charts, Guest can view Project outlines, Guest can view task details in Gantt/outline views, Guest can view Invoices, Guest can view Workspaces, and Guest can customize lists.

To create a Guest Role:

1. Go to Administration > Global Settings > Guest roles.
2. Select **New Guest role** from **Create Button**.
3. Enter the Role name. Select the options you would like enabled for the guest role.
4. Enter any Notes, if desired.

5. Click Save.


Guests

See the Employee [Demographic](#) form for instructions on filling out the Guests > New employee form. When you click on the Guests link, the New employee form displays. Many of the fields and settings are the same.

Roles Overview

Global Settings

Roles



Role	Default new employee role	Full access role	Guest role	Assigned employees
All	All	All		
Administrator		✓	No	2
Consultant	✓		No	17
Project manager			No	5
Resource manager			No	1
Controller			No	1
Contractor			No	2
6 rows				28

Roles within OpenAir define what an employee can do in the system. The role setup designates what rights and privileges are available to employees with the specific role. This includes what applications the employee can access as well as whether they can view, modify, or create various records within OpenAir. For example, a Project Manager role may be created that lets project managers modify projects, but does not allow them to change the project stage.

The New role form has numerous settings which cover general and application-based entities and items. There are separate sections for General Settings, My Account, Workspaces, Opportunities, Resources, Projects, Timesheets, Expenses, Purchases, Invoices, Integration, Proxy restrictions, and Guest Settings. Each of these sections is described as follows.

The use of Roles and Filter Sets allow you to control an employee's security in the system. Roles are also the primary means of field isolation in form permissions. See [Form Permissions Overview](#).

Roles - Typical Roles/Form Permissions

There are predefined Roles within the application: Administrator and Employee.

- **Administrator role** — cannot be modified. The Administrator's primary system usage is maintaining system configurations, adjusting for company needs, data audits, report creation, release management, process enforcement, and general administration.
- **Employee role** — can be modified as needed. The Employee role typically has very few rights and privileges.

Here are some other typical roles that you may create:

Employee (default) — Primary system usage is time and expense entry. There is no edit or create capability on any other object within the system.

Project manager — Primary system usage is budget and schedule management of projects. This may include project creation, financial review (no create-edit access to financial data), and resource management permissions (submit booking requests, create bookings, etc.).

Finance — Primary system usage is invoicing and billing-revenue financial management of projects. It also may include project setup and client setup.

Human Resources — Primary system usage is employee maintenance as well as vacation and sick time (HR benefits) reporting. Typically, employees with this role can also create and edit employees as well as view all timesheets and expense reports in the system.

Project Administrator — Primary system usage is project setup, including billing and recognition rules, and client creation. This role does not usually have invoicing capability or the ability to create or edit financial information regarding billing and revenue.

Resource Manager — Primary system usage is for resource bookings and the management of resource schedules. This may also include project and task assignments within the Projects application.

Super Employee — Primary system usage is managing localized system configuration items such as invoice layouts, employee maintenance, and company calendars. This role has limited impact to global system configuration changes, although shares some System Administration responsibilities.

To create Roles:

1. Go to Administration > Global Settings > Roles.
2. Select **New Role** from **Create Button**.
3. Enter the Role name.
4. Select the check box if this new role will be the default role for new and imported employees.
5. Select the applicable settings on the role form. The role form contains sections covering the options for the functional areas and applications within OpenAir. Refer to the following sections for an explanation of each role setting.

Roles - General Settings

The General Settings section lets you specify general role permissions. For example: View Clients, View and modify Clients, and View and Modify Clients (except name). In this example, by selecting View and Modify Clients, View Clients is included and does NOT need to be checked. You can select the check boxes to turn options **on** or **off** based on the role requirements.

Most of the following options include either simply View or View and modify: Clients, Client locations, Prospects, Contacts, Projects, Employees, Generic employees, Departments, Attribute sets, Roles, Services, Service 1 lines, Payroll types, Expense items, Vehicles, Approval processes, Vendors, Employee costs, Loaded costs, Generic employee costs, Employee job codes, Generic resource job codes, Filter sets, Custom time ranges, Account-wide reports, Employee login detail report, Auto-billing rules, Hierarchies, Tax locations, Job codes, Rate cards, Cost centers, External IDs, Snap shots, Calendars for others, Audit trails, Internal IDs, Dashboard graphs, Email templates, Calculated fields, Built in summary fields, Tag groups, Target utilization, Download lists, Download reports.

Also within the General Settings section are the following role options:

- **View and modify existing employees** — lets employees with this role view and update existing employees in the system. This is useful for roles that may need to modify employees but who should not have the ability to create new employees.
- **See billing rates and budget amounts** — This is useful for project managers or others so that they are aware of project financial information.
- **Customize forms and/or Customize lists** — Customize forms option permits employees to modify certain forms within the application such as Receipts or the Timesheet. You, as the system administrator, are generally the employee who customizes forms, although some companies also use a super employee account. Customize lists permits employees to change the order and selection of fields in the list view (e.g., Projects or Employees).
- **Restrict data viewed on reports** — Share saved reports with other employees, Specify report usage designations, and Specify report filter sets.
- **Download lists and reports into Microsoft Excel or PDF files** — Download lists and Download reports.
- **Employee Unlock** — Allow employees to unlock the account of other employees who have failed the security requirements set for your OpenAir environment. Many companies restrict this option to you, the system administrator, and to a backup employee for times when you are unavailable.
- **View and modify all list views** — Enables users to access and manage all saved list view configurations in an account from the Administration module or from within list views. This features requires the following internal switch to be enabled: Saving list view configurations. To enable this internal switch, [Creating a Support Case](#).

- **Change owner on list views** — Enables users to change the owner for saved list view configurations they have access to. This feature requires the following internal switch to be enabled: Saving list view configurations. To enable this internal switch, [Creating a Support Case](#).

Roles - My Account

Options in the My Account section relate to Administration > Global Settings. You can select the check boxes to turn options **on** or **off** based on the role requirements. However, we recommend that most of these options be limited to System Administrators.

The View and Modify options include: Dashboard, Company demographics, Company schedules, Company logos, Company settings, Terminology, Custom fields, Currency rates, Base currencies, My charges, Automated back-up service, Company status on dashboard, and Employee status on dashboard.

Also within the My Account section are the following role options:

- **Exchange information** — Import Clients from outside sources as well as Export data to other applications including Microsoft Excel.
- **Use of the following wizards** — Bulk employee change wizard, Expense report attachment wizard, American Express receipt import wizard, and Bulk task change wizard. The wizards allow you to make bulk changes to certain aspects of related records. For example, if you were going to change the department across a large set of employees, you would use the Bulk employee change wizard.
- **Administration** — Perform company maintenance functions and Create own proxies.

Roles - Expenses

Options in the Expenses section relate to the Expenses application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Expense report alerts, Payment types, Expense reports, expense report layout, expense grid, reports, authorizations, and expense report reimbursements.

Also within the Expenses section are the following role options:

- **Create charges from approved expense reports** — This option permits charges to be created after an expense report has been approved. You must have enabled the following internal switch: Automatically bill expense items assigned to a client when an Expense report is approved. To enable this internal switch, [Creating a Support Case](#).
- **Book approved authorizations** — This option permits employees to book (i.e., create a financial transaction) for the item when the authorization is approved in the system.
- **Allow employee to delete (individually or in bulk) open, submitted or rejected envelopes** — This option permits employees to delete any open, submitted or rejected expense reports either individually or in bulk. This feature requires the following internal switch to be enabled: Administrators can delete employees envelope. To enable this internal switch, [Creating a Support Case](#).

Roles - Timesheets

Options in the Timesheets section relate to the Timesheet application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Time types, Timesheet alerts, Ceridian payroll integration, Approved timesheets, Archived timesheets, Time off requests, Timebills from approved timesheets, Timesheet layout and rules, Reports, Adjust approved timesheets, Leave accrual transactions, Accrual rules, Run leave accrual, and View the time entry tab.

Also within the Timesheets section are the following role options:

- **Create charges from approved timesheets** — This option permits charges to be created after a timesheet has been approved. You must have enabled the following internal switch: Automatically bill time assigned to a client when a timesheet is approved. To enable this internal switch, [Creating a Support Case](#).



Note: Most clients use Billing Rules to generate charges. If you use Billing Rules, this role permission is not applicable.

- **Run leave accrual** — This option permits employees to run the leave accrual and update leave balances. We recommend that you limit this option to System Administrators and run leave accrual at a specified day and time.
- **Allow employee to delete (individually or in bulk) open, submitted or rejected timesheets** — This option permits employees to delete any open, submitted or rejected timesheets either individually or in bulk. This features requires the following internal switch to be enabled: Administrators can delete employees timesheets. To enable this internal switch, [Creating a Support Case](#).

Roles - Projects

Options in the Projects section relate to the Projects application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Dashboards, Project locations, Tasks and Phases, Task types, Gantt chart layout, Reports, Project analysis, Project overview, Recognition rules, Transfers, Task cost and Billing projections, Project stages, Assignment groups, Project pricing, Baselines, Booking grid, Project alerts, Issues, Issue statuses, Issue severities, Issue sources, Issue stages, Budgets, and Unlock projects (locked by OpenAir project connector).

Also within the Projects section are the following role options:

- Hide the profitability section in the project overview.
- Create and modify project billing rules and Run project billing. We recommend you limit these options to roles of employees who control the financial aspects of projects.
- Change the project stage of a project. This option can be useful when the employee who manages a project is not the one to change the stage of the project.
- Enable the advanced booking worksheet functionality.

Roles - Workspaces

The options in the Workspace section relate to the Workspace application. You can select the check boxes to turn options **on** or **off** based on the role requirements. The options include: create, view, and modify workspaces, view account storage usage, view and modify document categories; copy, move and download documents; view reports; and view and modify workspace alerts.

Roles - Invoices

Options in the Invoices section relate to the Invoices application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Charges, Invoices, Invoice payments, Invoice layouts, Reports, Charge stages, Agreements, and Client POs, and Change the client PO of a charge.

Also within the Invoices section are the following role options:

- **Change the charge stage of a charge** — This option permits employees to change the charge stage of a previously created charge (timebill). We recommend this option be restricted to those personnel with billing responsibilities.

- **Change the agreement of a charge and Change the client PO of a charge** — This option permits employees to adjust the agreement or client PO on a charge in the system. We recommend this option be restricted to those personnel with billing responsibilities.

Roles - Resources

Options in the Resources section relate to the Resources application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Skills, Booking types, Industries, Job roles, Locations, Education, Custom profiles (1-35), Profiles, Bookings, Booking grid, Booking requests, Deal booking requests, Client engagement history, Reports, Resource options, Optional resource detail in Custom search and quick search, and Resource alerts.

Also within the Resources section are the following role options:

- **Enable profile worksheet** — This option permits employees to modify a profile. When enabled, a **Worksheet** link displays in the Resources application for any resource that the employee has access to through their Filter Sets.
- **Create bookings** and **Customize the form used to create multiple bookings** — These options allow employees to schedule a resource on a project. We recommend that you restrict this option to those in a resource or project management function within your company to avoid resource scheduling conflicts. OpenAir lets you book multiple resources at the same time as well as to customize this form to meet your needs.
- **Create booking requests** and **Create deal booking requests** — These options allow employees to request resource bookings for projects or on deals in the Opportunities application is available.
- **Customize the Custom Search form** — This option permits employees to customize the Custom Search form to include or exclude skills, education, custom profiles in the custom search. See [Search - Resources Application](#) and [Custom Search](#).

Roles - Purchases

Options in the Purchases section relate to the Purchases application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Manufacturers, Purchasers, Carriers, Accounts payable locations, Receiving locations, Products, Shipping terms, Payment terms, Purchase requests, POs, Quick PO items, Fulfillments, PO layout, Reports, Reduce purchase item quantity payable, and F.O.B. locations.

Also within the Purchases section are the following role options:

- **Create POs** — This option permits employees to create purchase orders directly without having to submit a purchase order request.
- **Create and modify non-PO purchase items** — This option permits an employee to create or modify purchase items that have not been previously identified as Products within OpenAir on purchase orders.
- **Create fulfillments** — This option permits employees to record fulfillments against purchase orders within OpenAir.
- **Can reduce purchase item quantity payable** — This option permits employees to adjust the quantity to be paid on a PO within the system.

Roles - Opportunities

Options in the Opportunities section relate to the Opportunities application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Create, view, and modify Deals; Estimates; Proposals; To Dos;

Events; Territories; Employee locations; Business types; Client sources; Client sizes; Templates; Proposal layout; Reports; and Deal stages.

Also within the Opportunities section are the following role options:

- **Assignments** — Assign to dos to all employees, Assign events to all employees, and Assign deals to all employees
- **Create charges from accepted proposals** — This option permits employees to convert charges to time entries when a client or prospect has accepted the proposal. If this is a Prospect, the prospect must be converted to a client in order for the charges to be billable.
- Change the deal stage of a deal

Roles - Proxy Restrictions

Options in the Proxy Restrictions relate to proxy permissions. You can select the check boxes to turn options **on** or **off** based on the role requirements. Proxy permissions allow an employee to proxy or, in other words, log-in as another employee and perform actions within the system as that employee. The system can distinguish between a direct login and a login done via proxy. In addition the system can distinguish the actions performed directly within a particular account and one done by a proxy.

Proxy restrictions under the **Roles settings** restrict what a proxied-in employee can do. Examples of proxy restrictions include: A proxy employee cannot approve timesheets, A proxy employee cannot approve their own timesheets, A proxy employee cannot approve booking requests, or A proxy employee cannot approve invoices.

Roles - Integration

Options in the Integration section relate to QuickBooks, which is used in the OpenAir Integration Manager. Select this check box when the following is desired: Elevate to full admin privileges for QuickBooks integration.

There are a variety of integrations with OpenAir. Employees can download some of them from your OpenAir account under Add-on services. As a System Administrator, you provide an employee with Exchange Access. See [Access Control](#).

Other integrations are enabled through an internal switch. You may need to discuss integration availability with your Sales Representative or Professional Services Consultant. As a System Administrator, when an integration is enabled, you generally provide employees access to it. You may want to speak with your Professional Services Consultant to understand other integration options and how to implement them in your company's account. See [Account](#).

Employee Locations

Cancel SAVE SAVE & CREATE ANOTHER

New employee location

Name

Notes

☒ Active employee location

Employee locations allow you to store location attributes at the employee entity level. These attributes can then be reported on. Sample employee locations could be by state, by city, by country, or any customized list of values.

To create Employee locations:

1. Go to Administration > Global Settings > Employee locations.
2. Select **New Employee location** from the **Create Button**.
3. Enter the name of the employee location along with any Notes, if desired.
4. Select the check box for **Active employee location**.
5. Click Save.

Employees Overview

Global Settings - Users

Account

Customers

Organization

Users

Employees are individuals that have access to the OpenAir application. They can be your company's employees, subcontractors, or guests. For example, a client might be an employee that has limited access to their own invoices or workspaces. See [Guests](#).

The New Employee form contains a number of sections including employee demographic information and individual settings. Some key forms are discussed in separate content sections that follow. When you complete the New employee form and save it, you will have access to additional forms which contain other employee information and settings.

To create an Employee:

1. Go to Administration > Global Settings > Employees.
2. Select **New Employee** from the **Create Button**.

Employees are defined with five basic levels of permission:

- Role
- Filter Sets
- Application Access
- Form Permissions, that are tied to Roles
- Permissions for Approval and Export

With these five levels, each employee in your OpenAir environment may have a unique experience. As the System Administrator, you must be able to interpret action items and questions in terms of the employee's setup configuration. Review the following summaries for a definition of the five basic permission levels.

- **Roles** — define feature permissions (Ask yourself : What does this person need to do in the system to complete their job?) Roles should be setup for general system usage that are reusable for a number of employees.
- **Filter Sets** — define what data the employee has permission to view and/or update. Items such as projects and employees are identified within the filter sets, which give employees specific data access. Roles and Filter Sets may overlay to provide a feature/data matrix of capabilities for the employee.
- **Form Permissions** — provide specific field access on certain forms, as defined by the Administrator. The Role/Filter set matrix can be then further limited by the individual form permissions that are setup per each role. Form permissions may be set on almost every form within OpenAir and can only be configured by OpenAir Administrators. See the Tips area below a form for a **Modify the form permissions** link to see if permissions may be controlled via form permissions. See [Form Permissions Overview](#).
- **Application Access** — provide the ability to access certain applications of OpenAir functionality. This permits more generic roles to be setup and then control access to entire applications of functionality via the application access. An example of this is when employee is granted the ability to create invoices in their Role, but they are restricted from the Invoices application. This essentially deactivates any permissions the employee has via the role since the Invoices application is not available to them.
- **Permissions for approval and export** — provide the ability to un-approve as well as un-export items within OpenAir such as timesheets, expense reports, invoices, booking requests, project recognition transactions, and proposals. Any item set up that follows the approval process functionality displays in the Employee Demographic form with an optional check box to grant un-approve as well as un-export permission to an employee for the item. Permission is controlled at an employee level on the Employee Demographic form and is NOT granted via roles. These features are centered around approval and data export capabilities. These settings are very sensitive and many times are set for integration considerations.

The five levels of setup may be overwhelming. So, start simply with a small set of roles and one or two basic filter sets. Then, expand as you define employee scenarios that require more permissions or expanded/restricted data access.

You can create roles from existing roles, which makes adding new, similar roles easy. If new Roles are set up with only a slight change from a current role, we recommend that you use a naming convention such as 'XXX Deviation (what is different)' to ease in administration. Small changes between roles give you, the System Administrator, a quick reference to the general permissions of the employee by the name of the role.

For example, a Employee role and a Employee Deviation (view all Timesheets/Expenses) role have only a slight difference. The basic role displays only the employee's own timesheet and the deviation permits the viewing of all timesheets for employees to which the employee has access to see via the filter set.

Another example would be to limit an employee to only be able to access Active and Internal projects by using form permissions to restrict access to other project stages.

Demographic

Cancel SAVE SAVE & CREATE ANOTHER

New employee

Employee ID * Role Active employee ☒

Title First name Middle name Last name *

Address

City State/Province ZIP/Postal code

Country

Email *

Phone Mobile Fax

Password * Confirm password * Force a password change ☐

Password hint

A hint or question to remind you of your password

This form holds much information about employees. After a new employee is set up and you return to this form, it is titled Edit employee demographic information.


When setting up an employee, the first item that is presented after selecting the create option is the Demographic form. A number of fields exist on this form with only a few being required (by default) in OpenAir.

Note: Form permissions are available on this form, so any field may be made to be required, read-only, or hidden if desired. See [Form Permissions Overview](#).


The first part of the demographic form requests general information about the employee per your organization:

- **Employee ID** — Must be unique and is used by the employee to log into OpenAir. Many clients use the first part of the company email address as the login userid.
- **Role** — Provides permissions within the system (the Role must be defined prior to setting on employee record).
- **Active employee** — This checkbox controls the activation of the employee account. If the box is unchecked, the employee does not appear in the drop-down lists populated with employee names and is unable to log in to NetSuite OpenAir.
- **Name elements** — First and Last name are required. Middle and title are optional. The first and last name entered are displayed in all employee drop-down lists in 'last name, first name' order.

- **Address information** — Optional. Address information entered may be displayed on expense reports.
- **Email address** — Required since OpenAir communicates to end-employees via email with alerts, reminders, and informational messages.
- **Password** — Required. When setting up a new employee, it is recommended to leave the hint area blank.

 **Note:** The employee can be set to change the password upon initial login. This is helpful during the set up of new employees.

- **Manager** — The manager must be entered into OpenAir to be available in the drop-down list. The manager is frequently involved in item approvals such as timesheets and expense reports.


 **Note:** The manager must be defined as an active employee in NetSuite OpenAir to set this field. The drop-down is populated based on active employees defined in the system.

- **Cost center** — Must be defined prior to setting on the employee record. See [Cost Centers](#).
- **Job code** — Must be defined prior to setting on the employee record. See [Job Codes](#).
- **Department** — Must be set up prior to setting on the employee record. See [Departments](#).


Employees Demographics - Approver

A series of Approvals display for the approval process, depending on which items have been activated in the system. See [Approval Options](#). Approvals may be set to dynamic values, specific individuals, or a defined approval process.

- Dynamic values include [Self approver], [Manager], [Manager's manager], [Account owner], and [Project owner]. Each dynamic value is substituted with the employee's actual value when the approval process is executed.

 **Note:** Account owner and Project owner may not resolve themselves to a specific named resource and may cause auto-approvals, which are not desired. These two settings are more appropriate for Project approval setups. The way the system works, if project level approvals are enabled for the account, the system always checks the project level for approval, AND then references the employee record setting of approval.

- The second type of approval setting is a named resource. Select the resource from the drop-down list, which contains all active employees within OpenAir.

 **Note:** This may involve more administration to keep the relevant approvers current. If a named employee is desired, an approval process containing the single employee is recommended for a single location in case the named employee changes positions within the company or leaves the company.

- The last type of approval setting is an Approval process. The approval process object permits the definition of one or more employees. It also controls the routing of an item's approval for concurrent review/approval, auto-approval based on a defined limits. Approval processes allow for easy maintenance of approval routing changes by capturing the routing in one place that is referenced among many employees and projects. When a change is made, the next execution of the process will follow the new routing definition. Approval Processes must exist prior to being selected on the employee record. See [Approval Options](#) and the approval processes associated with the Timesheets, Expenses, Invoices, Purchases, and Resources applications.

Note: The **Save as the default approvers** check box sets the approvers defined in this employee record as the default for each new employee record created in the system. We recommend that System Administrators are the only role granted this authority. Avoid having defaults reset by other roles.

Employee Demographics - Custom Fields

You may create any number and type of custom fields to appear on the Employee Demographic form. The entry of this information is dictated based upon your company's configuration and may also be controlled through the form permissions of the Employee Demographic form. See [Custom Fields](#).

Employee Demographics - Filters Hierarchy

There are two places on the Employee Demographic form that reference Filter Sets: Primary filter sets, with optional application overrides if you have this feature activated, and the Filter set field at the bottom of the form.

Note: The difference between the settings is that one is used for granting a data view to the employee and the other is used to group the employee into the correct data view. These values may be the same or different depending on your filter set structure.

Primary Filter Set — defines what the employee can see in the system. There is an optional application overrides feature, activated by OpenAir Support upon request, that lets you restrict data views based on which application the employee is in. The optional override is useful for controlling items such as projects available for timesheet entry and resource booking reviews, while allowing a general view in other applications.

Filter set — The Filter set value normally found at the bottom of the form is what you use to put an employee into a data view. Depending on your system configuration, the filter set may need to be a required field to ensure correct placement of employees into data views. The Filter set and the Primary Filter Set values may not match as the employee may be allowed to see a restricted data view but need to be defined to a larger data view.

Examples of Primary vs. Filter set settings are:

- Data views are set up geographically for regional data views. The employee's Primary Filter Set is restricted to a Self view while the Filter set setting is the region with which the employee is associated such as USA. This same example applies to department viewing if you desire a unique department view, functional organization viewing, and so forth.
- One or more employee Hierarchies may also be defined to organize the employees for reporting purposes. The Hierarchies must exist prior to being selected on the employee record. The hierarchy's primary purpose is to allow roll-up reporting according to a specific structure. See [Hierarchy](#).
- There is also the ability to limit Project level access to employee. If you have created Project hierarchies in your account and have the project level access feature activated, you are able to limit an employee's view by setting a project level access based on the defined project hierarchy. By selecting the project hierarchy and the specific node within that hierarchy, the employee's filter set has the ability to include projects in their data view within those defined hierarchy nodes. Contact OpenAir Support if you would like to have the project level access by hierarchy feature activated.

When you create an employee record, you can add attachments to the employee record, provided the attachments functionality has been enabled in your account. Attachments can include a wide variety of documents such as the following: employment forms, client recommendations, and emails.

To add or edit attachments:

1. Select the Browse button to add a new attachment.

- Click on the Manage current attachment link to download, replace, or delete an existing attachment.

Frequently Asked Questions (FAQs)

What are the differences between an employee's Primary filter set and the Filter set (shown at the bottom of the form) in the Employee Demographic form?

The Primary filter set is the data view access this employee has in the system. Adding the employee to a Filter Set at the bottom of the employee form adds them to the view of other employees with that Filter Set as their Primary, and causes the employee name to display in the Access > Employee Access section of that Filter Set.

Access Control

Demographic	Access control	Schedule	Cost	Proxy	Filter sets	Leave accrual	Employee entity tag	Target utilization
Access control type		Status						
Application access		Access to all applications						
Exchange access		Access to: OpenAir OffLine, OpenAir for Palm, OpenAir Projects Connector, OpenAir Mobile (iPhone), Integration Manager						
2 rows								

This link displays within the employee record after the Employee Demographic form has been saved. There are two main access control setting: Application access and Exchange access. Each is described as follows.

Application access — controls which applications are available to the employee from the menu options. A standard set of applications may be applied by clicking the following: Default set of applications for new employees. Typical application access generally includes Dashboard and Timesheets. This is to help minimize confusion for the end employee, i.e., if employees never need to worry about invoicing, the Invoices application is removed from their application access and they do not see it in their account. The granting of application access does not automatically grant feature permission, which is controlled by the employee's Role in the system.

Exchange access — permits the definition of Add-on services the employee is allowed to download.

Note: The removal of exchange application access does not eliminate the ability to download the application. The removed applications display above the download link for the specific application that indicates: Not approved for download.

Schedule

The Schedule link displays within the employee record after the Employee Demographic form has been saved. By default each employee has the company work schedule set. You can use the associated work schedule for your employees or you can define a work schedule specific to a particular employee. For more information about company work schedules see [Work Schedules](#).

If work schedule time ranges are enabled, you can define start times for each day of the week. See [Optional Features](#).

Note: You need to enable work schedule time ranges and ensure that employees work schedules include start times to create bookings with start and end times for these employees, see [Frequently Asked Questions \(FAQs\)](#) under the Resources chapter.

For new employees to the company, we recommend that you enter a schedule exception for a system start date to the day before work begins to ensure utilization reporting is accurately recorded. When the

employee leaves the company, we also recommend that you enter a schedule exception for the day after departure to a future date approximately five years into the future to ensure correct utilization reporting.

Cancel
Save

▼ This employee is associated with the following company work schedule

Australia work schedule (work days:hrs/day) - Monday:8, Tuesday:8, Wednesday:8, Thursday:8, Friday:8 ▼

► Work schedule for Marie Porter

☒ Use the associated company work schedule
☐ Use this employee-specific work schedule:

►

Work hour schedule

Custom ▼

Description	Default start time	Mon	Tues	Wed	Thur	Fri
Work schedule	08:00AM					

▼ Exceptions to Marie Porter work schedule

These employee schedule exceptions are in addition to those defined in the associated company work schedule.
By entering a zero for 'Hours to work per day' below, you are indicating that the employee is not scheduled to work at all during that exception timeframe. This would be the case for a vacation or holiday for example.

Description	Start date (YY-Month-DD)	End date (YY-Month-DD)	Hours to work per day*	Reason (time type)
				Select... ▼
				Select... ▼
				Select... ▼
				Select... ▼
				Select... ▼

[Add rows] ▼

To define a work schedule specific to an employee:

1. Go to Administration > Global Settings > Users > Employees > [select an employee] > Schedule.
2. Choose the **Use this employee-specific work schedule** under the Work schedule for <employee's name> section.
3. Check the boxes for each day of the week the employee is available.
4. Enter the **Work hours per day for this employee**.
5. If work schedule time ranges are enabled for your account:
 - a. Under the Daily work hours section, enter either a **Default start time** or a start time for each day of the week the employee is available. The end time is set based on the number of hours for that day.
 - b. (Optional) Enter a **Description**.
6. Add any exceptions to <employee's name> work schedule.
7. Click **Save**.

Frequently Asked Questions (FAQs)

What is the difference between an employee's schedule and the company Work Schedule, set up under Global Settings > Work schedules?

The company Work Schedule is the baseline work schedule for the specific regions/areas within your company. The default work schedule displays in each employee's demographic until it is changed. A employee's schedule, on the other hand, is unique to that particular employee. You can accommodate a variety of situations with this feature. For example, you may have employee (a part-time employee) that works from 9:00 a.m. - 1:00 p.m. each day or an employee that works 4 days per week (Monday - Thursday) for 10 hours per day.

Cost

Current hourly cost Currency

USD ▼

When you change the cost above, move the old value into the historical costs section below.

Historical hourly costs

Start date	End date	Hourly cost	Currency
<input type="text"/> 📅	<input type="text"/> 📅	<input type="text"/>	USD ▼
<input type="text"/> 📅	<input type="text"/> 📅	<input type="text"/>	USD ▼
<input type="text"/> 📅	<input type="text"/> 📅	<input type="text"/>	USD ▼

[Add rows] ▼

The Cost link displays within the employee record after the Employee Demographic form is saved. Employee cost is recommended to be a fully loaded cost, ideally normalized for job code bands and thus obscuring specific salary information. Cost information may be restricted by role and by removing the view form permissions on the role assigned to the employee. There is a "current" cost value and additional rows so that historical costs may be captured for individual employees and is automatically utilized in reporting. Historical costs may be tracked in multiple currencies. This is helpful if resources moved between geographies and were subsequently paid out in different currencies.

Cancel
SAVE

Primary loaded cost

Current hourly cost
Currency

90
USD

When you change the cost above, move the old value into the historical costs section below.

Historical hourly costs

Start date	End date	Hourly cost	Currency
			USD
			USD
			USD

[Add rows]

Secondary loaded cost

Current hourly cost
Currency

When you change the cost above, move the old value into the historical costs section below.

Historical hourly costs

Start date	End date	Hourly cost	Currency
			USD
			USD
			USD

[Add rows]

Tertiary loaded cost

Current hourly cost
Currency

When you change the cost above, move the old value into the historical costs section below.

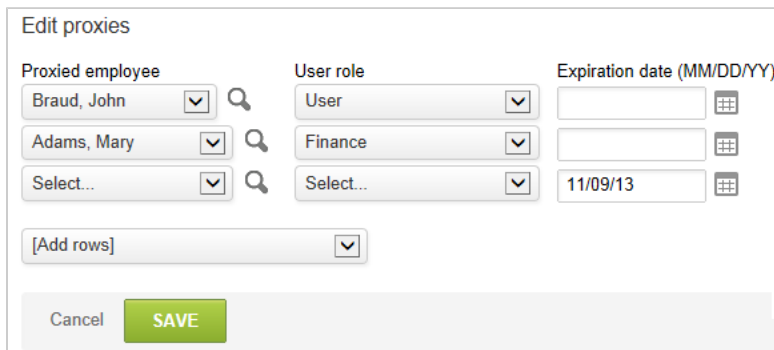
Historical hourly costs

Start date	End date	Hourly cost	Currency
			USD
			USD
			USD

[Add rows]

You are also able to store three levels of costs within the system: primary, secondary, and tertiary. These costs can be used in detail and summary reporting. You must enable the three levels of costs for your account by contacting OpenAir Support. Request that the following internal switches be enabled: Show cost tab and/or form if employee can view any of the loaded cost levels and Available loaded costs (Support - Check with Sales before enabling). You can control access to view each individual level of cost by the role settings.

Proxy



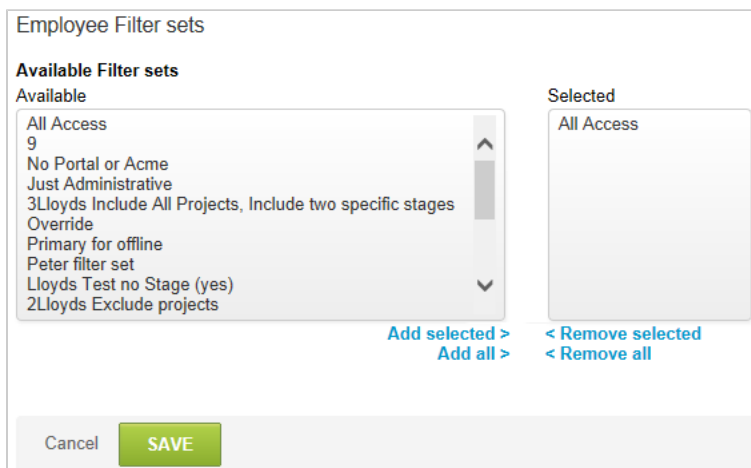
The 'Edit proxies' form is used to configure proxy settings for an employee. It contains three columns: 'Proxied employee', 'User role', and 'Expiration date (MM/DD/YY)'. The 'Proxied employee' column has a dropdown menu with 'Braud, John', 'Adams, Mary', and 'Select...' options, each with a search icon. The 'User role' column has a dropdown menu with 'User', 'Finance', and 'Select...' options, each with a search icon. The 'Expiration date' column has a date input field with a calendar icon. Below these columns is an '[Add rows]' button. At the bottom are 'Cancel' and 'SAVE' buttons.

The Proxy link displays within the employee record after the Employee Demographic form has been saved. Proxy settings allow an employee to login in as another employee into OpenAir with a single click and no knowledge of the other employee's password. When proxying in as an employee, the role defined in the proxy setup grants permissions to the proxying individual within OpenAir. Due to this, it is highly recommended that the ability to proxy is controlled by a System Administrator or other named resource and that an expiration date is set. This ensures employee proxying is granted only as required. Proxy is very helpful for allowing others to approve items such as timesheets on behalf of employees when they are out of the office or do not have access to OpenAir.

To create a Proxy under an employee's (the person doing the proxying) account

1. Go to Employees and select a Employee ID. Click the Proxy link. Select the Proxied employee account from the drop-down list and then the Employee role. This should be the role assigned to the proxied employee on their Demographic form.
2. To set an Expiration date for the proxy, go to Global Settings > Proxy Expirations and set the default proxy expiration. This ensures the proxy expires automatically on the specified date. See [Proxy Expirations](#).
3. To proxy in to another employee's OpenAir account, select **Log in as** from the **User Center** menu. Choose the employee link for the person you wish to proxy in for. When selected, a new NetSuite OpenAir session begins for the chosen employee's account. See [Log in as...](#)

Filter Sets



The 'Employee Filter sets' form is used to manage filter sets for employees. It is divided into two main sections: 'Available Filter sets' and 'Selected'. The 'Available Filter sets' section has a list of filter sets: 'All Access', '9', 'No Portal or Acme', 'Just Administrative', '3Lloyds Include All Projects, Include two specific stages', 'Override', 'Primary for offline', 'Peter filter set', 'Lloyds Test no Stage (yes)', and '2Lloyds Exclude projects'. The 'Selected' section has a list of selected filter sets: 'All Access'. Below these sections are buttons for 'Add selected >', 'Add all >', '< Remove selected', and '< Remove all'. At the bottom are 'Cancel' and 'SAVE' buttons.

This link displays within the employee record after the Employee Demographic form is saved. Filter sets control the data an employee sees in the system. There are variety of data viewing controls within a filter set, usually by entity, including Clients, Projects, Project stages, Employees, Services, Time Types, and Expense items.

A employee may have more than one filter set available for their use. However, only one filter set can be active at any particular time. The default filter set is entered on the employee's Demographic form as the Primary filter set. Other filter sets may be made available to the employee via the **Filter sets** link.

To view or modify the Filter Sets available to an employee:

1. Go to Employees and select a Employee ID. Click the Filter sets link.

To change a primary filter set on the Employee's Demographic form, you need to access the Filter Set link of the Employee's account. From there, you can add additional filter sets or replace the value that is currently set as the primary filter set on the Demographic form.

If more than one filter set is granted to a Employee, the primary filter set is the default data view upon employee login. Employees may then change their data view or filter set by accessing Dashboard > Change Filter set tab. Available filter sets for the employee to select are those that have been provided within the Filter Set link of the employee record. See [Change Filter set](#).

Note: Individual filter set overrides by application may also be defined on the Employee Demographic form. In this case, a change to the primary filter set does not impact the application overrides unless the override setting is [Active filter set].

Leave Accrual

Setup leave accrual rules

#	Leave accrual rule	Start Date	End Date	Transfer Balance To
1	Free Time	05/02/94		
2	Select...			
3	Select...			
4	Select...			

[Add rows]

Cancel **SAVE**

Leave accrual rules establish the framework for employees to accrue and draw down time. Select the leave accrual rules that apply to the employee.

To add or remove Leave accrual rules:

1. Go to Employees and select a Employee ID. Click Leave accrual.
2. Select the Leave accrual rule from the drop-down list.
3. Enter leave accrual rule information such as Start Date and End Date.
4. Select the leave accrual rule number to Transfer Balance To that applies to this rule.

Note: You can transfer leave balances from one rule to another rule. This is useful if an employee has multiple leave accrual rules and some have end dates applied. When setting up leave accrual transfers, make sure to consider the timing of leave accrual in the rules.

5. Click Save.

There is an advanced report that displays leave time accrued at a glance, draw down and available leave balances by employee and by period, along with other details like department, manager and employee cost center. To run this report, go to:

Reports > Advanced > Timesheets > Leave accrual summary.

Employee Entity Tag

Cancel
SAVE

Edit employee entity tag

Default entity tags

Tag group	Tag group attribute	Delete
Select...	Select...	<input type="checkbox"/>
Select...	Select...	<input type="checkbox"/>
Select...	Select...	<input type="checkbox"/>

Historical entity tags

Start date	End date	Tag group	Tag group attribute	Delete
		Select...	Select...	<input type="checkbox"/>
		Select...	Select...	<input type="checkbox"/>
		Select...	Select...	<input type="checkbox"/>

The Employee entity tag link displays within the employee record after the Employee Demographic form is saved and the employee tag feature is enabled.

Tag groups are defined with specific attribute values. When tag groups have been established in the system, the Employee entity tag may be modified for each employee. See [Tag Groups](#).

The Employee entity tag provides a custom field with historical data tracking ability. The viewing of tag groups and attributes can be controlled via role permissions. This permits the tracking of sensitive information, such as HR data, and can restrict data access within the system by the employee's role. When you have applied a Tag group entity tag to an employee, you can customize the Employees list view to display the tag group value.

To enable the Employee entity tag feature:

1. Go to Administration > Global Settings > Optional features.
2. Select the check box to Enable employee tag feature.
3. Click Save.

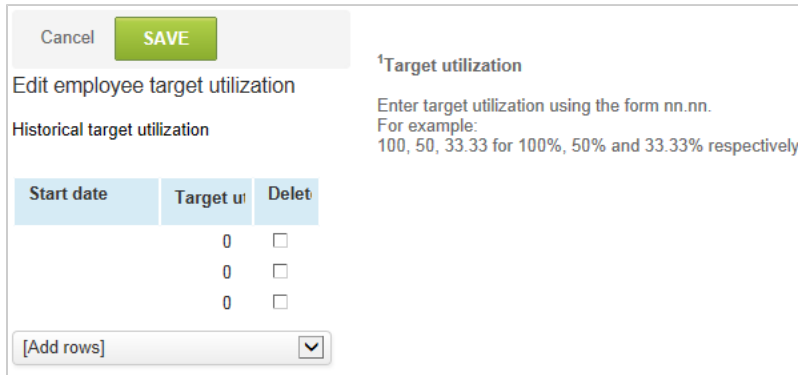
Frequently Asked Questions (FAQs)

How would I use the Employee Entity Tag?

The Employee entity tag feature within OpenAir lets you specify particular attributes to an employee. Although different from the standard fields on the demographic, these attributes can also be reported on

within the system. to use the Employee entity tag, you must have created Tag groups and the Attributes within them. See [Tag Groups](#) for instructions on how to create Tag Groups. Tag group values can be added to the Employees list view.

Target Utilization



Cancel **SAVE**

Edit employee target utilization

Historical target utilization

Start date	Target utilization	Delete
	0	<input type="checkbox"/>
	0	<input type="checkbox"/>
	0	<input type="checkbox"/>

[Add rows] ▼

1Target utilization

Enter target utilization using the form nn.nn.
For example:
100, 50, 33.33 for 100%, 50% and 33.33% respectively.

The Target utilization link displays within the employee record after the Employee Demographic form is saved and the Target utilization feature is enabled. Target utilization is defined as the utilization expected from an employee for capacity planning purposes. After a target utilization has been set, various values become available for reporting including Target utilization, Base target hours, and others. Target utilization will be available in both utilization reporting as well as capacity reporting. Historical utilization reports may also be created.

To enable the Target Utilization feature:

1. Go to Administration > Global Settings > Optional features.
2. Select the check box to Enable target utilization feature.
3. Click Save.

Jobs, Rates

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Jobs, Rates. The following lists them in the order in which they display on the Global Settings window.

- [Billing Rates](#)
- [Cost Centers](#)
- [Job Codes](#)
- [Rate Cards](#)

Billing Rates

OpenAir lets you select how the system determines hourly Billing Rates. The options are: Service, Service / Client, Employee, Employee / Project, Client / Project, and Project billing rules. This is a global setting that controls all billing rates in the system. Therefore, you cannot choose Service for one client and Project billing rules for another.



Important: We strongly recommend that you use Project billing rules. Changing to another method from Billing Rules hides Billing Rules in your system and may create confusion among your employees who do billing.



Note: Your company may use the term Service or Activity. Depending on your company's terminology preferences, one or the other displays in selections on this form.

To access the Billing Rates:

1. Go to Administration > Global Settings > Billing rates.

Service — This selection determines the billing rate to the client based on the various kinds of services performed. These rates apply to all Clients.

Service / Client — This selection is similar to the Service type noted above as the rate is based on the various kinds of services performed. The difference is that with this option, the Service rates dialog appears on the Clients form and lets you designate the billing rates for the kinds of services performed specifically for this client. This is useful if you have preferred Clients for which you discount your services.

Employee — Choosing the Employee option selects the billing rate entered in the employee's Demographic record for the billing rate.

Employee / Project — This setting enables the Employee billing rate tab. The Employee billing rates link displays. By selecting this link, you are able to set billing rates by employee for this particular project.



Note: The Employee billing rates link is not available via the Projects application, only through the Administration application.

Client / Project — This setting enables the Billing information tab. If you create a new or edit an existing client, you can then set a specific rate to be charged on all projects for this client. The Employee billing rates link displays. This is useful if you charge a blended rate for all work done for a client.

Project billing rules — Selecting this option provides you with the most flexibility in billing the client. You can create billing rules for every project based on the terms of the particular contract or statement of work. You can use hourly billing rates, fixed fee, and receipt based billings.

Cost Centers

Global Settings Cost centers

Cancel SAVE SAVE & CREATE ANOTHER

New cost center

Name

Notes

☒ Active cost center

Cost centers function as a reporting and accounting tool to track costs related to expense receipts and employee time entries. You can associate cost centers with the following entities: Clients, Projects, Tasks, Services, Time types, Expense Items, and Employees.

To create Cost centers:

1. Go to Administration > Global Settings > Cost centers.
2. Select **New Cost center** from the **Create Button**.
3. Enter the Name and Notes. By default, Active cost center is selected.
4. Click Save. After saving the form, the list of cost centers will be displayed and you can click on links to set Receipt rules and Time entry rules.

Explanation:

Receipt rules — determine which receipts within expense reports are assigned to the cost center. Receipt rules can be set by Client, Project, Task, Expense Items, and Employee. You can then chose multiple selections.

When an employee creates and saves an expense report, the associated expense item is checked against the receipt rule selections. If a receipt matches a selected item that is associated with a cost center, the cost center is assigned to the receipt. If no item is found, then no cost center is assigned.

There are multiple selections in case there is not one uniform way that costs are associated to a cost center, i.e., you can select a project and then an employee. In the majority of instances, the expense receipt is stamped with a cost as derived from its associated project. In the absence of a cost center on a project, the system looks for the cost center associated to the employee, if applicable, to stamp the expense receipt. The same applies to time entries.

Time entry rules — determine which time entries are assigned to the cost center. Time entry rules can be set by Client, Project, Task, Expense Items, and Employee. You can chose multiple selections.

When an employee creates and saves a timesheet, the associated time entry items are checked against the time entry rule selections. If a time entry matches a selected item that is associated with a cost center, the cost center is assigned to the cost, which is determined by multiplying the time entry by the employee's associated cost. If no item is found, then no cost center is assigned.

When an item is selected, a Cost center field is added to the form for that entity. You need to associate each item you selected with its appropriate cost center by editing these entities individually. For example, if you create a Employee cost center called US Employees, and have Employee for Receipt Rules, you then need to go to each employee in the US Group and add them to the US Group cost center on the Employee Demographic record.

Job Codes

Global Settings | Job codes

Cancel SAVE SAVE & CREATE ANOTHER

New job code

Job code

Loaded cost (money/hr) Currency

USD

The loaded cost is used in project pricing

Generic

Select...

The work schedule of this generic will be used in FTE forecasting for this job code

Notes

☒ Active job code

Job codes classify employees into general job positions defined by your company. Job codes are not necessarily job titles at the company. They are normally used as a type of employee that you bill out to a client. You can give job codes a generic cost for calculating estimated margins without named resources. You can also give job codes a bill rate within a rate card. For example, you may create a Project Manager, Consultant, and Engineer job code. Generic resources may be associated with a job code to inherit rates for forecasting purposes. See [Rate Cards](#).

To create Job codes:

1. Go to Administration > Global Settings > Job codes.
2. Select **New Job code** from the **Create Button**.
3. Enter the Job code name and Loaded cost per hour (used to calculate project costs for analysis), select Currency, and associate with a Generic resource.
4. Add Notes, if desired.
5. Click Save.

Rate Cards

Cancel SAVE SAVE & CREATE ANOTHER

New rate card

Name

Rates

Job code	Rate (money)	Currency
Select...	/ Hr	USD
Select...	/ Hr	USD
Select...	/ Hr	USD

[Add rates]

Other

Notes

☒ Active rate card

Use rate cards to define bill rates for a group of job codes. You can use rate cards to determine billing rates in Project Billing Rules as well as Project estimating based on job codes. You can create multiple rate cards, which is helpful if you negotiate different bill rates per job code, per client. For example, for Client ABC, a project manager bills at \$150 per hour; however, for Client XYZ, a project manager bills at \$140 per hour. In this example, you would have two rate cards for each billing arrangement.

To create Rate cards:

1. Go to Administration > Global Settings > Rate cards.
2. Select **New Rate card** from the **Create Button**.
3. Enter the rate card Name.
4. In the Rates section, select the Job code from the drop-down list (job codes must be previously created in the system), the Rate (per hour) to be charged, and the Currency. See [Job Codes](#).
5. Add Notes for additional description, if desired.
6. Click Save.

Clients

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Clients. The following lists them in the order in which they display on the Global Settings window. The following lists them in the order in which they display on the Global Settings window.

- [Contacts](#)

- [Client Locations](#)
- [Clients](#)
- [Prospects](#)

Contacts

Global Settings **Contacts**

Cancel **SAVE** **SAVE & CREATE ANOTHER**

New contact

Title First name Last name Nickname

Job title Email Phone Mobile Fax

Client affiliation AAA ☒ Active contact

☐ Copy client address
Check this box to copy client address to this contact record.

Address

City State/Province ZIP/Postal code Country

Notes

A Contacts link becomes available for a client when you save the Client form. You may also create a Contact using the Contact link. However, you must associate it with an existing Client. Contacts may be anyone your company wishes to track within OpenAir. See [Clients](#).

One special type of contact is the Billing contact. Contacts designated as a billing contact are available for association on the project form. You also use them in the invoice process by including contact information in the invoice address section. If the billing contact has an email address entered in the system, you may also choose to email invoices to the designated billing contact after the invoice has been approved. See [Client Billing Information](#).

Enter the first and last name in the contact form as well as the associated client record. All other fields are optional. If you have entered client address information, you may optionally copy the client address to the contact by selecting the **Copy client address** check box or override the address by typing in the address fields. Although the email address field is an optional field, it is useful to enter since other features within OpenAir allow communication to contacts with email addresses. You can send email messages to contacts specified in reports or an invoice generated for the client.

Client Locations

Global Settings Client locations

Cancel SAVE SAVE & CREATE ANOTHER

New client location

Name

Notes

☒ Active client location

Create and store client location attributes at the client entity level. You can then use these attributes for reporting. Sample client locations could be by state, by city, by country or any customized list of values.

To create Client Locations:

1. Go to Administration > Global Settings > Client location.
2. Select **New Client location** from **Create Button**.
3. Enter the location Name along with any Notes, if desired.
4. Click Save.

Clients

Your company may use the term client or client. Depending on your company's terminology preferences, different titles may display on these forms. In this manual, we are using client.

Cancel SAVE SAVE & CREATE ANOTHER

New client

Company name

Nickname

The nickname is the name displayed in the client lists.
If the nickname is blank the system will create one for you.

Web address

e.g. <http://www.openair.com>

Email

Phone Fax

Client owner

Select...

☒ Active

Mailing Address

Filter set
[> Create](#)

We define clients as those who drive business within your company. You can keep client information very basic or cover all information about the client, depending on what other systems you may be using to track client information.

To create Clients:

1. Go to Administration > Global Settings > Clients.
2. Select **New Client** from the **Create Button**.
The New client form displays.
3. After you save it, the information displays on the Edit demographic information form. To access it, click the Demographic link.

Note: The Client form asks for two basic pieces of information: Company Name and Nickname. Each is explained as follows.

Company Name — is the official corporate name of the client and is used within OpenAir on reporting and invoices.

Nickname — is a shortened version of the company name that is used throughout the user interface of OpenAir to save space on page views. The nickname does not appear on invoices. However, it does appear on formatted application reports such as Timesheets and Expense reports.

You may optionally enter client address information on the Client form along with a designated client location and client owner. If you enter a client owner, this resource becomes available for inclusion in the review or approval of items related to the client project such as timesheets and invoices. Basic client tracking information for sales such as territory, client source, business type, and so forth are provided for optional entry if the Opportunities application is enabled in your account. See [Opportunities](#).

Note: We recommend that you always set up a client account for your own company. You can use it for the internal tracking of projects.

Client Billing Information

Clients

Demographic Contacts **Billing information**

Cancel **SAVE**

Edit billing information

Billing contact
J. Watson

If different than the primary contact

Currency
USD

Payment terms
Net 30

Invoice prefix

Billing code

Invoice layout
[Use the default invoice layout]

Credit invoice layout
[Use the default credit invoice layout]

☒ Client can view statements

Invoice note (displayed on every invoice)

Email invoice text (displayed on every email announcing invoices)

A Billing information link becomes available for a client after you save the Client form. Billing information includes Currency, Payment terms, Invoice prefix, Billing code, and a standard invoice approver, which may be left blank if control is desired within the project.

A default set of Payment terms is supplied by OpenAir. However, you may create customized payment terms. See [Payment Terms](#).

The Invoice prefix lets you define a prefix for the client, which will allow sequential numbering based on the value of the prefix. This provides client level or ownership level invoice numbering. For example, if a set of clients is uniquely owned by an office or country, you can set an invoice prefix on all of these owned Clients to ensure the invoice numbering is sequential for the country or office. You may also choose an Invoice layout to use with this client, as well as a specific Billing code if you use Billing codes in your company.

If you are invoicing clients out of OpenAir via email, Clients can view their statements or account status within your NetSuite OpenAir system, provided you have selected the following check box on the Edit billing information form: Client can view statements. OpenAir employees can view statements using Reports > Advanced > Client statements.

Frequently Asked Questions (FAQs)

When would I use billing information at the client level?

You generally use billing information at the client level for one or more of the following reasons:

- You would like a specific person to approve all the client's invoices.
- There is a specified hourly rate you want to use for this client's billing and you are not using multiple rates by role, job code or service.
- There are particular payment terms for this client.
- You want to designate a special invoice prefix on all invoices for this client.
- You want to use a certain invoice layout for this client.
- There are particular notes you want to display on the invoice or email text.

How do the settings on the client billing information form work with project level settings?

If you leave items blank on the project form, the client billing definitions are used. If invoice text or notes are added at the project level, the client information and project information are added together on the invoice. The invoice approver is included in the invoice routing regardless of the project level settings.

Prospects

Cancel SAVE SAVE & CREATE ANOTHER

New prospect

Company name

Nickname
The nickname is the name displayed in the client lists.
 If the nickname is blank the system will create one for you.

Web address
e.g. <http://www.openair.com>

Email

Phone Fax

Prospect owner

☒ Active

Mailing Address

Filter set
[> Create](#)

Prospects are potential clients against which deals are being proposed. Prospects are only used in the Opportunities application and may be converted to clients at a later stage. The information captured for prospects is similar to that of clients without the information regarding billing. The link does not display for prospects.

To create Prospects:

1. Go to Administration > Global Settings > Prospects.
2. Select **New Prospect** from the **Create Button**.

Display

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Display. The following lists them in the order in which they display on the Global Settings window.

- [Customer Display Options](#)
- [Email Settings](#)
- [Email Templates](#)
- [Interface: Display](#)
- [Interface: Other](#)
- [Interface: Terminology](#)
- [Logos: UI, documents](#)
- [Print Settings](#)
- [Regional Settings](#)
- [Time Settings](#)

Customer Display Options

Customer display options let you control how customers are displayed on OpenAir forms.

The following settings are available:

- [Show additional fields for search](#)

Show additional fields for search

If you have multiple customers with similar names, additional information may be needed to identify the correct customer record when selecting a customer from a dropdown list or using the Customer search on entity forms.

Use this setting to select which additional fields are shown in the dropdown lists and search results.

By default, the customer dropdown lists on entity forms only include the customer **Name**. When the **Number of entries to display in Customer dropdowns** is set to a finite number in your personal settings, a search tool is also available. By default, the search results only include the customer **Name**.

You can configure OpenAir to show up to three additional standard or custom field values separated by a comma on the customer dropdown lists and search result lists if your role allows you to view the information.

The additional field values also show on Customer dropdown lists when using the Redesigned Advanced Filters optional feature.

The screenshot shows a form with a 'Customer *' dropdown menu. Below it is a 'Start date (YY-Month-DD) *' field with the value '22-Jan-26' and a calendar icon. To the right of the dropdown is a search box labeled 'Search' with a magnifying glass icon. The search results are displayed in a list: 'ABC', 'ABC Co., 324', 'abc company, 325', and 'ABCD AG, Ingolstadt, 1804'. Below the search results is a link for 'Advanced search'. The 'Currency' dropdown is set to 'USD'.

Email Settings

The screenshot shows the 'Email Settings' form. At the top, there are tabs for 'Global Settings' and 'Email Settings'. Below the tabs are 'Cancel' and 'SAVE' buttons. The form contains several settings:

- 'Forward undeliverable email to this email address' with an empty text field.
- 'Do not set the From: address to the current user's email address' with an unchecked checkbox.
- 'Text for time off requests submitted for approval emails' with a text area and up/down arrows.
- 'Text for booking requests submitted for approval emails' with a text area and up/down arrows.

Email Settings contains options related to the handling of emails within OpenAir. Each is explained as follows.

Forward undeliverable email to this email address: Each employee must have an email address entered on their account, however the email address may be invalid. Any emails such as notification or approval requests sent to an invalid email address are forwarded to the email address identified in this field. The System Administrator or a distribution list of System Administrators should be designated here to handle invalid email addresses encountered by the OpenAir emails. If a value is not entered, then undeliverable emails are ignored by OpenAir.

Do not set the From: address to the current employee's email address: Emails generated by an employee's account such as a timesheet approval request, displays the employee's return email address by default unless you have selected this option. If you do not want the employee's return email address to show up in emails generated by OpenAir, the return email address reads: www@openair.com. A reason you may want to consider doing this is that some of the less configurable email servers reject email coming from the OpenAir domain with your company's email address, incorrectly thinking it is spam email.

Text for time off requests submitted for approval emails: The content of the time off request submitted email can be defined here using key field names that can be substituted with field values within OpenAir. The allowed fields are:

- SUBMITTERNAME
- TIMETYPENAME
- STARTDATE
- ENDDATE
- DAILYDETAIL
- TOTALHOURS
- URL
- SCHEDULEREQUESTNAME
- DESCRIPTION
- CATEGORYNAME
- CUSTOMERNAME
- PROJECTNAME
- PROJECTTASKNAME

Text for booking requests submitted for approval emails: Similar to the time off request email, the content of booking request emails can also be defined here. To enter the content, type in the desired text and add in the available OpenAir fields as appropriate (typed in all caps bracketed by "%"). This enables OpenAir to substitute the actual field value for each of these field names.

Email Templates

The screenshot shows the 'Email Templates' configuration form. At the top, there are tabs for 'Global Settings' and 'Email Templates', with 'Email Templates' being the active tab. Below the tabs are 'Cancel' and 'SAVE' buttons. The form contains several fields: a 'Name' text input, a 'Template type' dropdown menu with a 'Select...' option, a 'Choose where this email template will be used' section with an 'Email subject' text input, a 'Will be appended to system subject' checkbox, and a large 'Email body' text area. Below these is a 'Field' dropdown menu with a 'Select...' option, followed by a small text input for the selected field. A 'Notes' text area is also present. At the bottom, there is an 'Active' checkbox and a note stating: 'Only one active template is allowed for each template type, activating this template may deactivate others'.

Note: It is recommended to use **Notifications** rather than email templates.

The email templates are similar and the New Project email template is presented as a sample.

You can create many email templates associated with applications. They can also be customized in OpenAir if additional information is needed to be displayed within the email. Project emails are created when a Project owner is added to a new project, existing project or removed from a project.

To create an email template:

1. In the template form, enter the Name and select the Template type. This is where you use a drop-down list to customize the email for the application you selected.
2. For Project email templates, the options are: New project owner on new project, new project owner on existing project, and removed project owner.
3. Add the Email subject, which is appended to the system subject. The Email subject and the Email body can be a combination of free form text and system fields.
4. To add system fields, choose the field from the drop-down list titled Field. After a field is selected, the field code displays under the Field. You can copy and paste this field code into the subject or email body. The field code pulls the value from the associated entity and displays it in the email.
5. Notes may be added to further explain the email template's purpose or description. You can only have one active template for each Template type. By creating and activating this new template, other templates of this type are deactivated.

Interface: Display

Global Settings **Display Options**

Cancel **SAVE**

Display Options

Number of entries to display in client:project drop-downs

Number of entries to display in client/prospect:deal drop-downs

Number of entries to display in client drop-downs

Number of entries to display in expense item drop-downs

Number of entries to display in product drop-downs

Number of entries to display in employee drop-downs

Number of entries to display in vendor drop-downs

Number of entries to display in approver drop-downs

Shorten client:project drop-downs

☐ Sort the client:project drop-downs by project

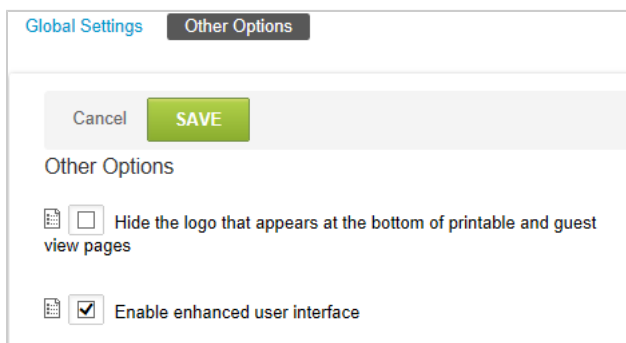
The Display Options allow you to select various presentation elements to the employees of your company's OpenAir environment. These elements may be enabled or disabled at any time. The options are listed below.

To access the Display options:

- Go to Administration > Global Settings > Interface: Display. Display options include:
 - Number of entries to display in drop-downs
 - Shorten the client:project drop-downs by omitting the client name
 - Sort the client:project drop-downs by project
 - Sort the task drop-downs by name and omit the ID number prefix
 - Hide the 'My Calendar' tab
 - Maximum number of rows to display per day in 'My Calendar' monthly view
 - Show 'My Calendar' tab in all applications
 - Show booking type for bookings as summary on the calendar
 - Show custom fields for bookings as summary on the calendar
 - Show custom fields for bookings as detail on the calendar
 - Show custom fields for task assignments as summary on the calendar
 - Show custom fields for task assignments as detail on the calendar
 - Show Account tab in 'My Account' application only
 - Remember the size of popup windows
 - Disable automatic resizing of popup windows
 - Add the save or run button to the top right of forms

- Add "Save and create another" button to the top right of forms
- Add approval buttons to the bottom of reports
- Anchor column titles at the top of page when scrolling vertically
- Preserve row highlighting when checking checkboxes in list views
- Enable anchoring of left columns when scrolling horizontally
- Hovering over menu links reveals menu options
- Enable collapsible sections in forms
- Enable dynamically collapsible sections in hierarchy lists
- Open popups as panels instead of windows
- Use on-page panel instead of popup for Time entry notes dialog on timesheet
- Show cost tab and/or form if employee can view any of the loaded cost levels
- Hide the help tab
- Hide the support tab
- Hide the help panel on forms
- Hide the footer tips and toggle link
- Control the data density displayed in list views with selected mode
- Control the data density displayed in timesheet grid with selected mode.

Interface: Other



Global Settings **Other Options**

Cancel **SAVE**

Other Options

☐ Hide the logo that appears at the bottom of printable and guest view pages

☒ Enable enhanced user interface

You use the Interface: Other Options to Hide the logo that appears at the bottom of printable and guest view pages, and to Enable enhanced user interface.

Interface: Terminology

The screenshot shows the 'Terminology' tab in the 'Global Settings' section. At the top, there are 'Cancel' and 'SAVE' buttons. Below this, the form is organized into three columns: 'Default term', 'Replacement term', and 'Custom replacement term'. The 'Default term' column lists five terms: 'accounting date', 'accounting period', 'agreement', 'approved', and 'assigned utilization'. The 'Replacement term' column has a dropdown menu for each term, all currently set to 'None'. The 'Custom replacement term' column has a text input field for each term, all currently empty.

Default term	Replacement term	Custom replacement term
accounting date	None	
accounting period	None	
agreement	None	
approved	None	
assigned utilization	None	

The Terminology form lets you override OpenAir's standard terms with your company's specific terminology. For example, this is where you designate using a term such as client versus client versus patient, or service versus activity. Overriding the standard terminology in OpenAir helps ease the adoption of the system by employees because the terms are more familiar to them. If you choose to override a term, OpenAir replaces all references of this term throughout the system.

Note: You only need to enter the replacement term in its singular form. OpenAir automatically generates the plural term where applicable.

To access the Terminology option:

1. Go to Administration > Global Settings > Interface: Terminology

Logos: UI, documents

The screenshot shows the 'Logos' tab in the 'Global Settings' section. At the top, there are 'Cancel' and 'SAVE' buttons. The form is divided into three sections for different logo types: 'Company logo for web', 'Company logo for PDF', and 'Company logo for page banner'. Each section has a text input field showing the current logo name ('honeycomb.png') and a 'Browse...' button. Below each input field, there is a checkbox to 'Remove' the current logo. The 'Company logo for PDF' section also has two checkboxes: 'Display PDF logo on first page only' and 'Display PDF logo full size'. The 'Company logo for page banner' section has a checkbox to 'Remove' the current logo and a text input field for the 'URL for company logo' with an example: 'e.g. http://www.openair.com'.

The Logos tab lets you enable the display of your company's logo within the OpenAir system and on documents such as invoices.

To configure Logos:

1. Go to Administration > Global Settings > Logos: UI, documents.

There are 3 main parts to the logo form:

- Company logo for web
- Company logo for PDF
- Company logo for page banner

Company logo for web — displays on the OpenAir HTML documents such as expense reports, invoices, proposals, POs, purchase requests, booking requests, deal booking requests and time off requests in the upper left corner of the document.

Company logo for PDF — displays on the OpenAir PDF documents such as expense reports, invoices, proposals, POs, purchase requests, booking requests, deal booking requests and time off requests in the upper left corner of the document. Since PDF documents may be more than one page long, OpenAir provides the option to print your company logo only on the first page of a multiple page document. This option saves page space on pages 2 through "x". With formatting options for the various reports available including top margin, you also have the option to force the logo to print in its full size and ignore the top margin restrictions on any particular report.

- If the **Display PDF logo full size** option is turned **off**, the report top margin as set up in OpenAir (depending on the application producing the report) is respected and the logo is resized to fit within the margin if it is too large.
- By selecting the **Display PDF logo full size**, the logo always prints to the size of the uploaded file and any top margin settings are ignored.

Company logo for page banner — displays on the OpenAir application pages in the corner of the header. A logo size of 100 pixels or smaller is recommended to avoid using too much header or page space being used. The formats supported are general picture file formats including .jpeg, .gif, and .png.

To load company logo for page banner:

1. Select the Browse button.
2. Locate the file from your desktop or company server to upload.
3. Click Save.
4. If you have loaded a logo that you would like to change, simply select another file to load and Save. The new file replaces the old file.
5. To remove a logo that has been loaded, check the **Remove** box below the logo file field. The remove box only displays if a logo exists for the particular option.

Note: You also have the option to link your company's URL with the displayed company logo throughout the OpenAir application. This gives employees the ability to jump into your company's website, ending their OpenAir session. If you do not set the URL field, clicking on your company logo defaults to the OpenAir home page:

<https://www.openair.com>

Frequently Asked Questions (FAQs)

My logo is displaying too large. How can I shrink it?

For PDF documents, check to see if you are forcing the reports to **Display PDF logo full size**. If so, uncheck or clear the selection and save the logo settings form. This enables the page top margin setting to be honored and the system to auto-size the logo to fit within the document header. If the logo is displaying too large on the OpenAir pages, you need to load a smaller logo from your company's marketing department. The recommended size is 100 pixels or smaller, depending on the nature of your logo.

Can I load more than one type of logo?

Yes, however you may only use one logo per type of display such as a logo for your PDF reports, a logo for your web reports, and a logo or no logo for your OpenAir application web pages. You cannot have multiple logos loaded for PDF documents, for example. There is one exception to this and that involves the Invoice Layout configuration forms. Each invoice layout may use a unique logo as loaded into the layout template.

Will OpenAir accept other formats for logos such as .bmp or .eps?

No. Attempts to load these types of files result in no file being uploaded to OpenAir. You must use the designated file types: jpg, gif, or png.

Print Settings

OpenAir uses the values set within the Print Settings form as default settings for any new employee records. Print Settings determine the style of paper used when generating PDF pages.

To access Print settings:

1. Go to Administration > Global Settings > Print settings.

Print settings PDF pages generated in OpenAir are configurable for printing within the specific applications that produce the PDF file. Options such as top and bottom margin may exist as well as font size. The print settings option assumes you are using a single paper size type for all printed documents out of OpenAir. The size types available are either Letter (8.5" x 11") or A4 (approx. 8.25" x 11.75" or 21cm x 29.5cm). The value you chose for the print setting enables OpenAir to set the location of the margins according to the size of the paper.

Note: Individual employees are able to change these settings to provide themselves with a more personalized look and feel to the system. See [Personal Settings](#).

Regional Settings

OpenAir uses the values set within the Regional settings form as default settings for any new employee records. Regional Settings provide how particular fields display on the forms and reports. For example, dates can display in the North American or the European date format.

To access regional settings options:

1. Go to Administration > Global Settings > Regional settings.

Date format: Throughout the OpenAir system, objects that are created or modified are dated. Setting the date format converts the dates to your desired format.

Important: Reports can be created and shared with custom dates entered according to the report owners date format. The sharing of reports with employees that have enabled a different date format causes the report to either interpret the custom date as the wrong value or as an invalid date. For example: Take a June report that has been hardcoded to start on 6/1/12 using a MM/DD/YY date format. If this report is shared with someone who is using a European date format such as DD/MM/YY, the report runs for January 6th, 2012 as the start date instead of June 1st, 2012. We recommended that companies that use OpenAir on a global basis set up reports using relative date values such as This Month or Last Quarter whenever possible.

Number format: The symbols defining decimals and thousands should be set according to your company headquarter's standard. Employees may override the number format and can display the numeric information using regional symbols for decimals and thousands (e.g. ,12,345.00 in the US can be expressed for European employees as 12.345,00).

List separator for CSV output files: When downloading data into CSV format, a comma is the typical delimiter in the Americas; however, in European countries other delimiters are typically used. OpenAir supports the configuration of the delimiter to separate data columns in downloaded reports. This enables an easier export to column formats within Microsoft Excel. Comma is the default value within OpenAir.

Time Settings

OpenAir uses the values set within the Time Settings form as default settings for any new employee records. Time Settings set the time display for your particular company's location.

To access Time settings :

1. Go to Administration > Global Settings > Time settings.

Time Zone: Throughout the OpenAir system, objects that are created or modified are time-stamped. The time zone setting converts the time values to your desired time zone.

Use 24-hour clock for time entry and display: Checking this option enables time to be displayed in military or Coordinated Universal Time format such as 22:00 for 10:00 pm throughout the system.


Week starts (default): This is an important default that defines the start of a week in your system configuration. Reporting may be done in daily, weekly, monthly, semi-monthly, and annual time periods. Each of these settings has a defined beginning and end except "weekly." The day of the week identified here is assumed to be day 1 of a 7 day week. Select the day of the week from the drop-down that indicates the beginning of your company's week.

Shift bi-weekly time period by one week: When you select this option, the first created item for the next time period starts one week later than the next available date. This is useful when converting your organization from a weekly to bi-weekly time capture process.

Account

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Account. The following lists them in the order in which they display on the Global Settings window.



- [API Integration Applications](#)
- [API Limits](#)
- [Automatic Backup Service](#)
- [FilterSet Settings](#)
- [Integration: Import/Export](#)
- [Optional Features](#)
- [Performance](#)
- [Proxy Expirations](#)
- [Security](#)


 **Note:** There are a number of links to different applications that integrate with OpenAir. We recommend that you speak with your Professional Services Consultant before attempting to use any of these integrations. Assistance with set up as well as relevant documentation may help guide you in using these integrations. See [Account Integration Settings](#) for a list of OpenAir integrations.

API Integration Applications

OpenAir supports OAuth 2.0, a robust authorization framework. This authorization framework enables client applications to use a token to access OpenAir through the OpenAir XML, SOAP, or REST API. The application accesses the protected resources on behalf of a user who gave an explicit permission for the access. This method eliminates the need for API integrations to store user credentials.

This feature is available if OpenAir API access is enabled for your account. It includes the following elements:

- **Administrators** can register up to 20 integration applications with OpenAir and enable or disable these applications in the Administration module. For more information, see [Managing API Integration Applications in OpenAir](#).
- **Application Developers** can use the OAuth 2.0 authorization code flow to get an access token then use the access token to access your OpenAir data using the OpenAir XML or SOAP API. For more information, see  [OpenAir SOAP API Reference Guide](#) and  [OpenAir XML API Reference Guide](#).

 **Note:** OpenAir only supports the OAuth 2.0 authorization code grant type.

- **End-users** can give applications explicit permission to access OpenAir on their behalf and they can revoke this permission at any time. For more information, see [Authorizing Applications to Access OpenAir on Your Behalf](#).



Note: The first time a registered application attempts to access OpenAir on their behalf, users must sign in using the same trusted login form they normally use to log in to OpenAir then give the application explicit permission. The OAuth 2.0 feature supports the following user authentication mechanisms:

- Password authentication by OpenAir — Users enter their Company ID, User ID and Password on the OpenAir login form.
- SAML authentication:
 - Service Provider initiated Single Sign-on — Users enter their login details on your company Single Sign-on form.
 - Identity Provider initiated Single Sign-on — Users must log in using their Identity Provider Single Sign-on form before the application attempts to access OpenAir on their behalf. When the application attempts to access OpenAir, the authorization screen appears automatically. Users do not need to enter their login details again as long as the Single Sign-on session has not expired.

Managing API Integration Applications in OpenAir

Integration applications using OAuth 2.0 to obtain access to your OpenAir data must be registered and enabled by an account administrator. To register and manage your integration applications, go to Administration > Global settings > API Integration Applications.

Note: OpenAir API access must be enabled for your account to connect tools and services to OpenAir using OpenAir APIs. The API Integration Application screen is not available if OpenAir API access is not enabled. To enable OpenAir API access for your account, contact OpenAir Support or your OpenAir Sales Representative.

1. All your registered applications are listed in a grid. Details include the name of the application and the date and time when it was last updated.
2. To register a new application, click **ADD NEW APP**. This button is disabled if you reach the limit of 20 registered applications. See [Adding a New Application](#).
3. To enable or disable an application, click **ENABLE** or **DISABLE** in the top right corner of the corresponding box. See [Enabling, Disabling, or Removing Registered Applications](#)
4. To edit an application configuration, click the edit icon  in the bottom right corner of the corresponding box. See [Application Configuration](#).
5. To remove an application configuration from the list of registered applications, click the delete icon  in the bottom right corner of the corresponding box. See [Enabling, Disabling, or Removing Registered Applications](#).
6. To select one or more applications, check the box next to each application you want to select. You can only select multiple applications if they are either all enabled, or all disabled. You can then enable, disable or remove the selected applications. See [Enabling, Disabling, or Removing Registered Applications](#).

Note: All times are given as Eastern Standard Time (EST).

Administration

ORGANIZATION • USERS • JOBS, RATES • CUSTOMERS • **ACCOUNT** • MORE •

Global Settings **API Integration Applications**

API Integration Applications

2 **ADD NEW APP**

Applications can help you connect tools and services to OpenAir using OpenAir APIs. Applications can be built by OpenAir, by third parties or by your own team.

Use this screen to add, enable or disable applications and manage their configuration. You can have a maximum of 20 applications.

Employees will be able to use an application if all the following conditions are met:

- The application must be enabled
- The employee must have the relevant permission
- The employee must allow the application to access your OpenAir data

If you disable an application, all employee authorizations related to this application will be deleted. Your employees will not be able to use the application.

Your applications **1** **DISABLE** **ENABLE** **REMOVE**

<input type="checkbox"/>	C	CRM Integration 3 DISABLE	<input type="checkbox"/>	E	Example Application 3 ENABLE
		Updated (EST): 2020-03-20 04:19:15			Updated (EST): 2020-03-20 05:29:16
		4 Edit configuration			
6 <input type="checkbox"/>	O	OAuth2 Connector ... ENABLE	<input type="checkbox"/>	S	Some New Integration DISABLE
		Updated (EST): 2020-09-12 18:23:28 5			Updated (EST): 2020-09-12 18:23:00

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Adding a New Application

You can register up to 20 applications. Each application needs a Client ID and Client Secret to obtain access to OpenAir using OAuth 2.0. The Client ID and Client Secret are generated by OpenAir as part of the registration process and are unique to each application.



Important: The Client Secret is a **private** key the application uses to request an authorization code from OpenAir. It should not be shared or stored in public code repositories.

The Client Secret is displayed only once. You will not be able to retrieve it after you close the Application Credentials dialog.

If you misplace the Client Secret, you can edit the application configuration and generate a new Client Secret for the application.

To register a new application with OpenAir:

1. Do one of the following:
 - Go to Administration > Global settings > Account > API Integration Applications, and click **ADD NEW APP**.
 - From any screen in OpenAir, click the Create button and click API integration application.The Add New Application dialog box appears.
2. Enter the following information:
 - **Application name** (Required) — Enter a display name for your application in OpenAir. The name must be unique to the application. You will not be able to use a name already used by another registered application.
 - **Description** — Enter a few sentences to tell your employees what the application and how it will help them. Your employees will use this information to decide whether they allow this application to access OpenAir on their behalf.
 - **Redirect URI** (Required) — Enter a link users should be redirected to after granting or denying the application permission to access OpenAir on their behalf.



Important: Client applications use the redirect URI when requesting access to OpenAir. Ensure you enter the redirect URI supplied by the application developers.

Add New Application

APPLICATION NAME *

Example Application CLEAR 19/255

Choose a name for this application. This name will appear in the application lists and relevant dialogs in OpenAir.

DESCRIPTION

This app was created to demonstrate the new OAuth 2.0 support features in OpenAir. A description is not required but it is good practice to tell your end-users what the application does. You have up to 600 characters to do so.

CLEAR 226/600

Provide a few sentences to tell your employees what this application does and how it will help them. Your employees will use this information to decide whether they allow this application to access OpenAir on their behalf.

REDIRECT URI *

https://example-app.com/redirect CLEAR 32

Provide a link employees should be redirected to after granting or denying the application permission to access OpenAir on their behalf.

CANCEL SAVE

- Click **Save**. The Application Credentials dialog box appears.
- Copy the **Client Secret** and store it in a safe place. The Client Secret is displayed only once. You will not be able to retrieve it after you close this window.

Application Credentials

The application will need the following credentials to gain access to OpenAir Web API using OAuth 2.0. The Client ID and Client Secret are generated by OpenAir and are unique to each application.

CLIENT ID

COPY TO CLIPBOARD

174_h1FiXfWsJtLJG0DG

CLIENT SECRET

COPY TO CLIPBOARD

vcFTaNE3nUXRuJ29jhEIXSH7LpXwbxTGdmJHoQMvo_jz4vldOPITFJ-ZFToYR2G6gnl0dqXeeiFUloKnRGsfQ

- The client secret should not be shared or stored in public code repositories.
- The client secret is displayed only once. You will not be able to retrieve it after you close this window. You can generate a new client secret at any time.

Copy the client secret and store it in a safe place.
To close this window, check the box to confirm you have stored the client secret in a safe place and click Close.

☒ I have stored the client secret in a safe place

CLOSE

5. Check the box to confirm you have copied and stored the Client Secret in a safe place then Click **Close**.

Enabling, Disabling, or Removing Registered Applications

You must enable an application to allow this application to obtain access to OpenAir using OAuth 2.0.


You can disable an application to prevent this application from obtaining access to OpenAir using OAuth 2.0. If you disable an application OpenAir automatically revokes all permissions given by users for the application to access OpenAir on their behalf. Employees will not be able to use the disabled application.

You can remove a disabled application from the list of registered applications. All permissions, authorizations and application credentials associated with the application configuration will be deleted. This action cannot be undone.

To enable or disable a registered application:

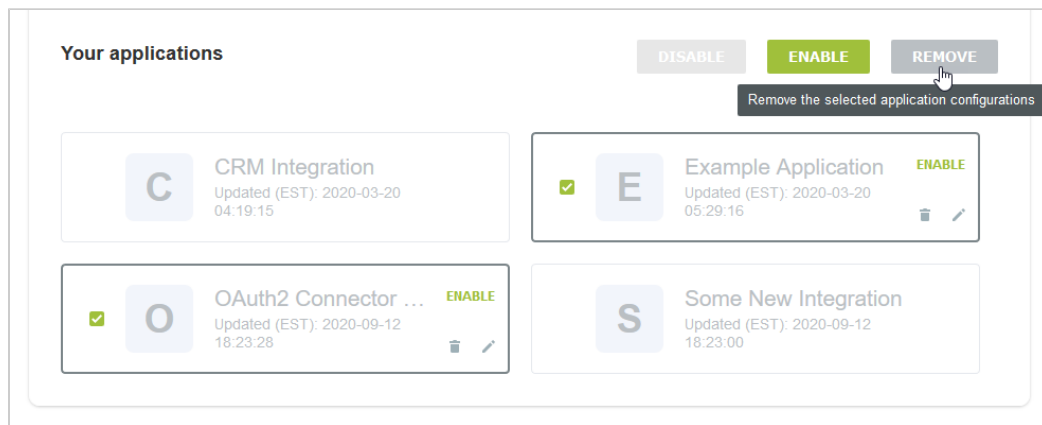
1. Go to Administration > Global settings > Account > API Integration Applications.
2. Click **ENABLE** or **DISABLE** in the top right corner of the corresponding box. A confirmation dialog box appears.
3. Click **ENABLE** or **DISABLE** to enable or disable the application. Click **Cancel** to cancel the operation and return to the API Integration Applications screen.

To remove a registered application:

1. Go to Administration > Global settings > Account > API Integration Applications.
2. Click the delete icon  in the bottom right corner of the corresponding box. A confirmation dialog box appears.
3. Click **REMOVE** to remove the application. Click **Cancel** to cancel the operation and return to the API Integration Applications screen.

To enable, disable, or remove multiple applications at the same time:


1. Go to Administration > Global settings > Account > API Integration Applications.
2. Check the box for each application you want to enable, disable, or remove. Notice that you can only select multiple applications if they are either all enabled, or all disabled. After you select the first application, the application that are not available for selection appear in light gray color. Notice also that some of the buttons in the top right corner of the list of registered applications become available and change from light gray color to dark gray or green.



3. Click **ENABLE**, **DISABLE**, or **REMOVE** to perform the corresponding action on all selected applications. A confirmation dialog box appears. Click **ENABLE**, **DISABLE**, or **REMOVE** to confirm. Click **Cancel** to cancel the operation and return to the API Integration Applications screen.

Application Configuration

You can view the configuration details of your registered applications, including their unique Client ID from the Application Configuration form. You can change the application name, description or Redirect URI or generate a new Client Secret for the application.

To open the Application Configuration screen for a registered application, go to Administration > Global settings > API Integration Applications and click the edit icon  in the bottom right corner of the corresponding box.

1. The **General** section of the form lists the main application detail:
 - You can change the **Application name**, **Description** and **Redirect URI**.



Important: Client applications use the redirect URI when requesting access to OpenAir. Ensure you enter the redirect URI supplied by the application developers. If you need to change the redirect URI, disable the application, change the redirect URI and enable the application again.

- You can view when the application was registered under **Created**.

Note: All times are given as Eastern Standard Time (EST).

2. You can view the **Client ID** — the unique identifier a client application needs to send to OpenAir along with a client secret as part of the OAuth 2.0 authorization code flow.
3. Use the **Tokens Lifetime** section to configure the validity period of the access and refresh tokens:
 - **Access token lifetime** — Select the expiration time of access tokens. Available values go from 5 to 60 minutes in 5-minute increments. The default access token lifetime is 15 minutes.

Note: The validity period of access tokens cannot be greater than the session timeout set for your account. If the **Access token lifetime** value is greater than the session timeout value, the session timeout value is used for the access token validity period. The application configuration form shows the current values for the session timeout and access token validity period for reference.

To change the session timeout value, go to Administration > Global settings > Account > Security.

- **Refresh token lifetime** — Select the expiration time of refresh tokens. Available values go from 1 to 31 days in one-day increments. The default access token lifetime is 1 day.

Note: Before the October 2021 OpenAir release, you could set the refresh token lifetime to values from 1 to 24 hours in one-hour increments. Values for the refresh token lifetime set before the October 2021 OpenAir release show in days (decimal values) instead of hours

As part of the OAuth 2.0 authorization code flow, authorized applications need to exchange an authorization code for an access token and refresh token to obtain access to OpenAir. The access token has a short expiration time. When the access token expires, the client application can use the refresh token to obtain a new access token without user interaction until the refresh token expires or the authorization is revoked.

Note: Access tokens normally remain valid for their entire lifetime. However, the access token becomes invalid before it is due to expire if any of the OpenAir business rules have changed and the access token is refreshed. Business rule changes may include any changes to the OpenAir configuration, or to the access privileges or role permissions of the employee who authorized the client application.

4. To generate a new Client Secret, click **Regenerate Secret** — You may need to generate a new client secret if you misplace or delete the client secret accidentally or if your client secret becomes compromised.

The new client secret will be valid immediately. The old client secret will continue to be valid for 24 hours after you generate a new one. This allows time to update any enabled application with the new client secret.

5. If you made any changes to the configuration details in the General section, the **Save** button is enabled. Click **Save** to save changes and return to the API Integration Applications screen or click **Cancel** to close the configuration form without saving.

API Integration Applications

Example Application

CANCEL SAVE 5

General 1

APPLICATION NAME *
Example Application CLEAR 13/255
Choose a name for this application. This name will appear in the application lists and relevant dialogs in OpenAir.

CREATED (EST)
2020-03-06 12:03:40

DESCRIPTION
This app was created to demonstrate the new OAuth 2.0 support features in OpenAir. A description is not required but it is good practice to tell your end-users what the application does and how it will help them. Your employees will use this information to decide whether they allow this application to access OpenAir on their behalf. CLEAR 228/600

CLIENT ID
147_64j8bj8YvMB7wL9 2

REDIRECT URI *
https://example-app.com/redirect CLEAR 32
Provide a link employees should be redirected to after granting or denying the application permission to access OpenAir on their behalf.

Tokens Lifetime 3

After the employee authenticates successfully and authorizes access, the application receives an Access tokens and a Refresh token. Access tokens have a short expiration time. When the Access token expires, the application can use the Refresh token to obtain a new Access token without employee interaction until the Refresh token expires or the authorization is revoked.

ACCESS TOKEN LIFETIME
45 minutes 5
Select the validity period of the Access token in minutes.

The validity period of access tokens cannot be greater than the session timeout set for your account. If the access token lifetime value is greater than the session timeout value, the session timeout value is used for the access token validity period.

The current session timeout value is: 30 minutes
The current access token validity period is: 30 minutes

To change the session timeout value, go to Administration > Global settings > Account > Security.

REFRESH TOKEN LIFETIME
31 days 5
Select the validity period of the Refresh token in days.

Client Secret

You can generate a new Client Secret at any time by clicking **Regenerate Secret**. Copy the new Client Secret and store it in a safe place. It should not be shared or stored in public code repositories. This Client Secret is displayed only once. You will not be able to retrieve it after you close this window.

REGENERATE SECRET 4

Last generated (EST): 2020-03-06 12:03:40

Authorizing Applications to Access OpenAir on Your Behalf

Integration applications let you connect OpenAir with other applications and they extend what you can do with OpenAir. Integration applications may use the OAuth 2.0 authorization protocol to gain access to your OpenAir account.

The first time an application using the OAuth 2.0 protocol attempts to access OpenAir on your behalf, you will need to give this application your explicit permission.

To authorize an application, you will typically use the following steps:

1. The application opens a browser and directs you to the same trusted login form you normally use to log into OpenAir — the OpenAir login form or your company Single Sign-on form appears.
2. Enter your login details and click **Log in**.

An authorization screen will appear indicating that the application <application name> would like to access your OpenAir data.

3. Read the content of the authorization screen attentively. It should describe what the application does and how it will help you. It should also say what the application can do, for example:
 - The application will be able to access all data you have access to.
 - The application will be able to perform all actions permitted by your role and user privileges.



Important: For Administrators — Business rules configured for your OpenAir account are applied when an integration application interacts with your OpenAir data through OpenAir REST API. However, they are not applied when an integration application interacts with your OpenAir data through OpenAir SOAP API or XML API — application developers must enforce business rules within their integration application if required. Business rules include OpenAir account configuration settings and access control mechanisms, as well as any user scripts deployed on your OpenAir account.

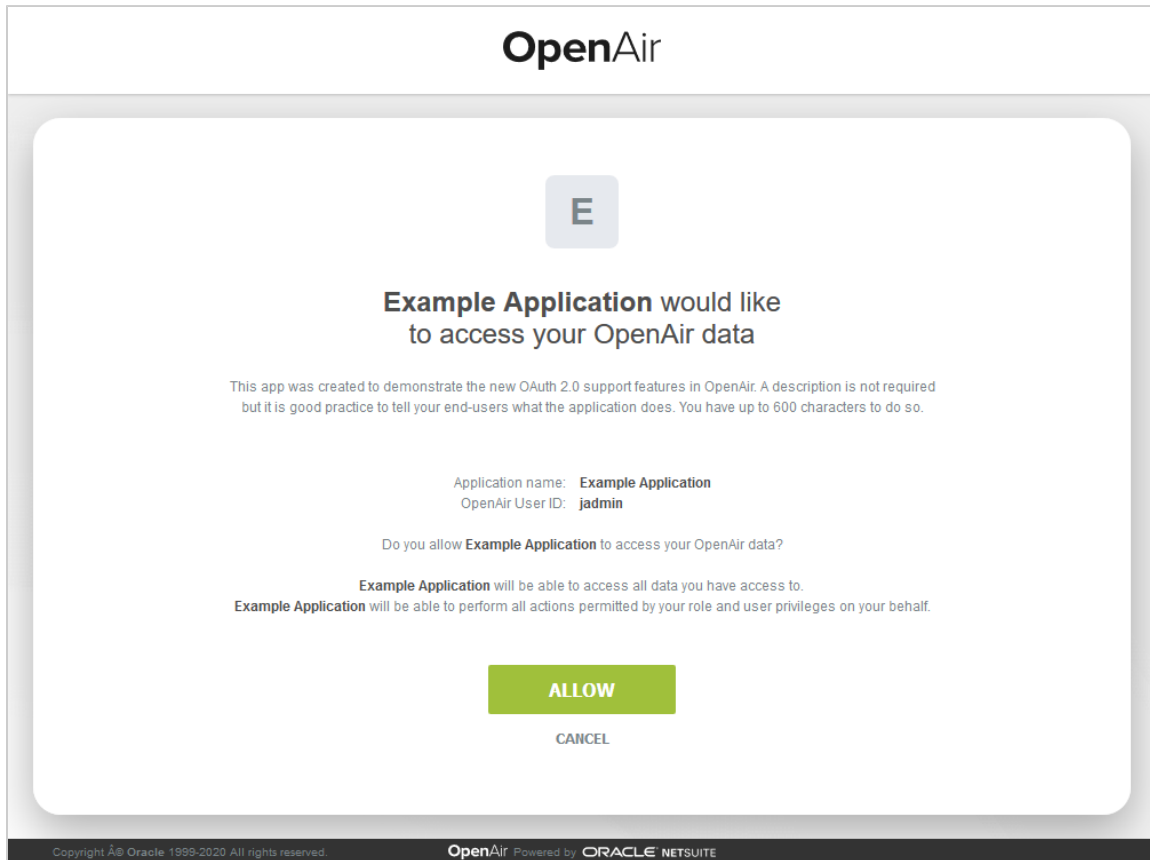
4. Click **ALLOW** to authorize the application or click **CANCEL** if you do not want the application to access OpenAir on your behalf.



Note: The steps may vary depending on the method you use to log in to OpenAir:

- If you normally enter your company ID, user ID and password in OpenAir or if you enter your company ID and user ID in OpenAir and then your password on your company Single Sign-on page, the above steps apply.
- If you normally need to enter all login details then select OpenAir from your company Single Sign-on solution to access OpenAir without needing to enter any login details on the OpenAir login page (Identity Provider initiated Single Sign-on), you must log in and select to open OpenAir before the application attempts to access OpenAir on your behalf. The authorization screen appears automatically. Follow steps 3 and 4 above. You do not need to re-enter your login details.

Integration applications are registered and managed by your account administrator. They need to be enabled on your account before they can attempt to connect to OpenAir and request your permission.



Note: Integration applications are registered and managed by your account administrator. They need to be enabled on your OpenAir account before they can attempt to connect to OpenAir and request your permission.

Account administrators can disable an application at any time.

- If you have authorized an application and this application is disabled by an administrator, the application will no longer be able to interact with OpenAir.
- If an administrator enables this application again, you will need to give this application your explicit permission again before you can continue to work with it in connection with OpenAir.

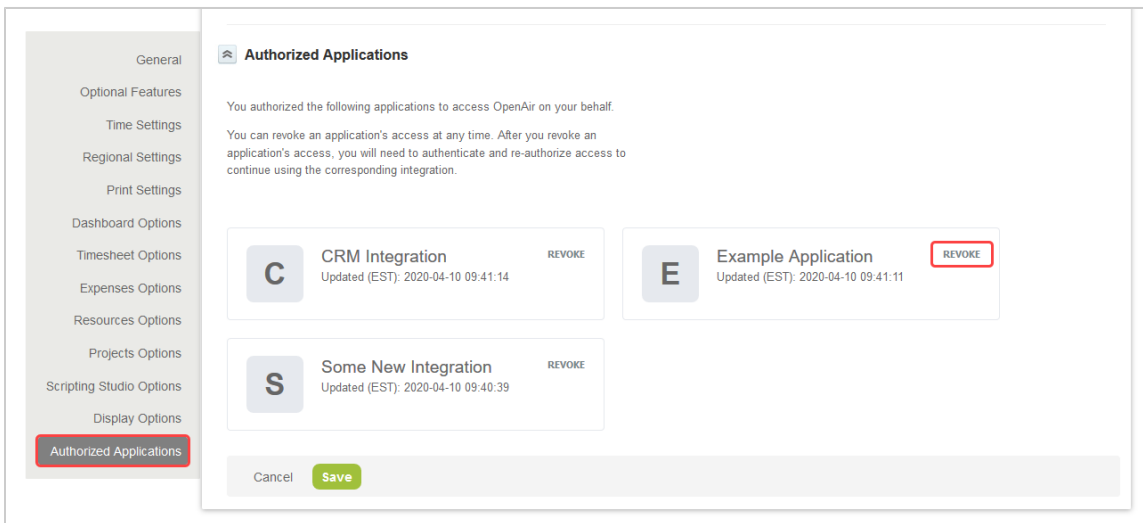
After you authorize an application, it will be able to interact with OpenAir on your behalf until you revoke the authorization.

To view the application you have authorized, go to User Center > Personal Settings > Authorized Applications. All your authorized applications are listed in a grid. Details include the name of the application and the date and time when it was last updated.

Note: All times are given as Eastern Standard Time (EST).

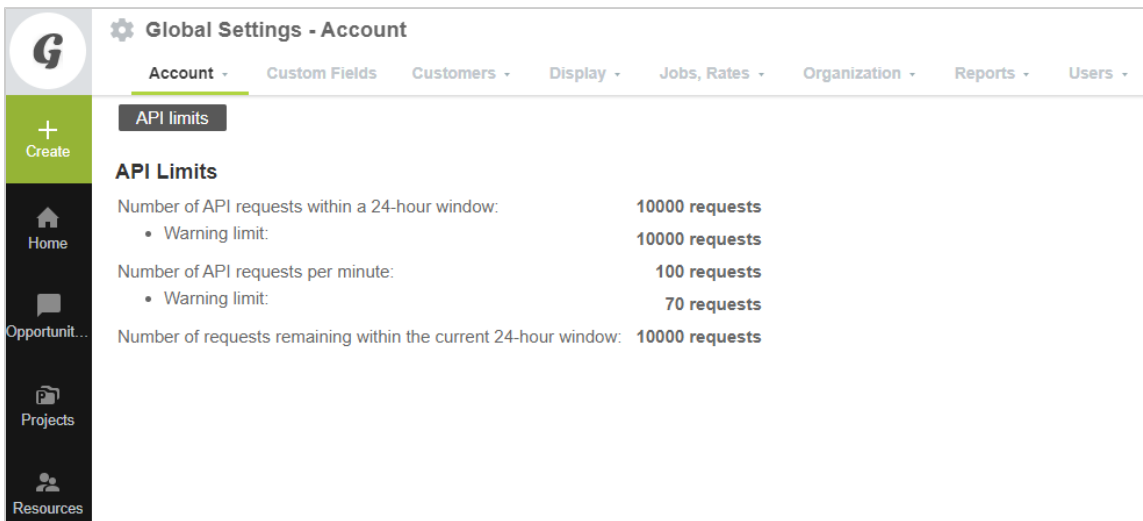
To revoke an application, click **REVOKE** in the top right corner of the corresponding box, then click **REVOKE** in the confirmation message. The application no longer shows in the authorized applications

list. If a revoked application attempts to access OpenAir on your behalf, you will be prompted to give this application your explicit permission again.



API Limits

This screen shows the API requests limits that are currently set for the account and the number of requests remaining within the current 24-hour period. It is a useful reference to track your usage level when using the OpenAir SOAP API and XML API. This is for reference purposes only, account administrators cannot change these settings. For more information, see [OpenAir SOAP API Reference Guide](#) and [OpenAir XML API Reference Guide](#).



Automatic Backup Service

The OpenAir Automatic Backup Service (ABS) lets you set up a regular delivery of your OpenAir account data to an email address or SCP/SFTP server for safeguarding. Your data is compressed as a ZIP file

and can be PGP encrypted for additional security. You can use this feature to download all of your data, workspace documents and attachments.

Note: The Automatic Backup Service is a licensed add-on and must be purchased separately. To enable the Automatic Backup Service feature, contact your OpenAir Account Manager or Professional Services Consultant.

Setting up the Automatic Backup Service

When the Automatic Backup Service (ABS) is enabled, go to Administration > Global Settings > Account > Automatic backup service and configure your backup settings.

- **Data to include in the backup** — Select which data will be exported in each backup. You can include the OpenAir data dictionary, text files (either comma- or tab-delimited) and MySQL import file. You can set the default CHARSET for your MySQL import files to "UTF-8", and include table relationships in the MySQL import file.

Note: If the **Apply relationships** box is checked, the MySQL import file contains statements to support table relationships:

- Change the storage engine to "InnoDB".
- Change foreign key columns to allow null values.
- Set foreign keys to null if the value is 0 (zero).

- **Documents and attachments** — Check the **Document and attachments** box to include them in the backup.
 - By default, the filename of each attachment and workspace document is the OpenAir internal ID number. You can append the original names and extensions to documents and attachments in addition to the OpenAir internal ID number.
 - You can use a **Date range filter** to include only documents and attachments created or updated during a specific period. Using a date range filter can be useful to manage the size of the backup file. The form indicates the total file size of selected documents before compression.
- **When do you want the backup to run** — schedule when you would like the backup to run. You can set the schedule to particular days of the week or month, or every day. You can also set the time for the backup to run. OpenAir recommends running the backup in the evening for better performance.
- **How do you want the data sent** — Select how the data should be sent. Options include SCP, SFTP or Email. Emails will not be sent if the files are larger than 60 MB. You can also suspend the service.

Important: The FTPS protocol in the Automatic Backup Service is no longer supported with effect from January 20, 2021.

- **SCP/SFTP settings**
 - **Address** — Enter the IP address or DNS name for your SCP or SFTP connection.
 - **Directory** — Specify a directory to put the exported file in.
 - **User name** — Enter the user name used for your SCP or SFTP connection.
 - **Password** — Enter and verify the password for the SCP or SFTP service.
 - **Status email** — Enter an email address for status emails to be sent to.

- **Status notification** — Select which events are included in status emails. You can include all events or errors only.
- **Disable remote file attribute copy** — Try to check this box if you receive setstat errors during the ABS transfer.
- **Try to resume transfer when it fails** — Check this box to try and resume the transfer in case the connection to the SFTP server is interrupted. This is only available if you choose to send your data using SFTP.

If the SFTP connection is interrupted, OpenAir will attempt to retry the scheduled automatic backup transfer twice. After the third unsuccessful attempt, an error is logged and a status notification email is sent to advise that the automatic backup was unsuccessful. The status notification email also indicates if the connection is interrupted but the automatic backup completes successfully on the second or third attempt.

- **Seconds between retry attempts** — Enter the time interval (in seconds) between ABS transfer attempts. The interval can be between 5 seconds (default) and 5 minutes.



Note: After you change the transfer method to SFTP, click **Save** to see the **Try to resume transfer when it fails** box and **Seconds between retry attempts** field.

- **SSH Security Information** — After you set up the ABS and OpenAir connects with the SCP or SFTP server, OpenAir stores the SSH public keys for all hosts ABS connected to (**Known hosts**). To clear the list, check the **clear list** box.



Note: To replace an existing SSH public key with a new one:

1. Check the **clear list** box.
2. Click **Save**.
3. Click the Tips button then **Test ABS connection settings**. If the connection test is successful, the new SSH public key is added to **Known hosts**.

- **PGP Encryption** — If you want to use PGP encryption, copy and paste the PGP public key in the text box.
- **Other**
 - **Include the audit trail in the text backup** — By default, text files do not include audit trails. Check this box to include the audit trail. This can make the text files difficult to parse. MySQL import files always include the audit trail.
 - **Include all tables in the text and MySQL backups** — By default, the export excludes some tables with typically large datasets. Check this box to include all tables in text and MySQL backups.
 - **Include status file with backup** — Check this box to include a small status file with data about the transfer. The status file contains the checksum of transferred file(s), file size, and the list of all tables.
 - **Tables to exclude** — You can exclude tables from a MySQL import file here. Enter the list of tables to exclude, separated by commas.

Exporting All OpenAir Attachments

When set up, each export will contain a folder within the main ZIP file containing all attachments, labelled with a numeric attachment ID. Select the “Add original names and extensions to Documents

and attachments” option in the “Data to include in the backup” section to add the original attachment filenames to each attachment in addition to the numeric attachment ID.

FilterSet Settings

Global Settings FilterSet settings

Cancel SAVE

FilterSet settings

- ☐ Require a filter set selection when adding or editing Clients
- ☐ Require a filter set selection when adding or editing Projects
- ☐ Require a filter set selection when adding or editing Project stages
- ☐ Require a filter set selection when adding or editing Services
- ☐ Require a filter set selection when adding or editing Employees
- ☐ Require a filter set selection when adding or editing Expense items
- ☐ Require a filter set selection when adding or editing Time types
- ☐ Require a filter set selection when adding or editing Charge stages
- ☐ Require a filter set selection when adding or editing Booking types
- ☐ The "Access to booked Projects/Clients" filters respect the booking type filter set


Using filter sets lets you specify access privileges to various entities in OpenAir such as clients, projects, and employees. You assign filter sets to employees. Based on how filter sets are created, an employee's view and access to the various entity values can be narrow or expanded to a wider and possibly an all-value level. Employees may have more than one filter set assigned to them, but only one may be used at any particular time. Essentially, a filter set is what an employee can see and a role is what an employee can do within the system. See [Filter Sets Overview](#) and [Change Filter set](#).

To access the Filter Set settings:

1. Go to Administration > Global Settings > FilterSet settings.

The options listed below control the use of filter sets at a company-wide level. See [Filter Sets Overview](#).

- Require a filter set selection when adding or editing Clients
- Require a filter set selection when adding or editing Projects
- Require a filter set selection when adding or editing Project stages
- Require a filter set selection when adding or editing Services
- Require a filter set selection when adding or editing Employees
- Require a filter set selection when adding or editing Expense items
- Require a filter set selection when adding or editing Time types
- Require a filter set selection when adding or editing Charge stages
- Require a filter set selection when adding or editing Booking types
- The "Access to booked Projects/Clients" filters respect the booking type filter set.

 **Note:** If a Booking type filter set has been created, this option restricts which projects and/or clients are available to the employee.

Integration: Import/Export

The Integration: Import/Export link contains links for exporting OpenAir account data and batch data.


Exporting Account Data


You can export all of your account data in a comma- or tab-delimited text file format. You can also export account data in MySQL format, so you can then import it to a MySQL database.

Additional export options include exporting your Account specific WSDL and XSD schema files.

To export account data in text format:

1. Go to Administration Global Settings > Account and click **Integration: Import/Export**.
2. In the Import/Export screen, click the **All data in text format** link.
3. In the **Choose which tables to exclude** list, select any tables to exclude from the text file.

 **Tip:** If you only want to include a small number of tables, first click Select all to exclude all tables, and then select the tables you want to include. In addition, audit trail information can comprise a significant amount of a table's size. If you do not need audit trail information, select the "Suppress the audit field data" option, which may significantly reduce the size of the generated file, and generate results more quickly.

 **Warning:** Some tables, such as **by_day**, are excluded from text exports. These tables can be exported using the Automatic Backup Service (ABS). For more information on ABS, see [Automatic Backup Service](#).

4. Select which text delimiter you want to use in the file. Text files can be comma- or tab-delimited, or you can select a regional setting CSV list separator.
5. Select the data layout format:
 - **Column titles in first row** — text file includes column titles for your data in the first row of the text file
 - **No titles in data** — the text file only includes data, and does not include column titles
6. Select a new line format. You can use Windows, Macintosh, or UNIX new line format.
7. Select the **Suppress the audit field data** option if applicable.
8. Click **Export**. OpenAir will create a ZIP file containing the generated data.

Global Settings **Import/Export**

Export data as delimited text

Choose which tables to exclude

ALL	SELECTED
278	0

Search ...

[Select all](#) [Clear all](#)

- account
- accounting_period
- accounts_payable
- actual_cost
- address
- adhoc_report
- agreement

Text delimiter:
Comma

Data layout:
Column titles in first row

New line format:
Macintosh

☐ Suppress the audit field data

Cancel **Export**

9. Click the **Click here** link to download the ZIP file with your data.

Global Settings **Import/Export**

A ZIP file containing all the data was generated.
[Click here](#) to download the file

Note: This process creates a MySQL file for the version of MySQL currently in use by OpenAir. The currently supported version is named on the **Export data as MySQL file** screen. The exported MySQL file can be imported into a MySQL database where queries and reports can be run against it.

To export account data in MySQL format:

1. Go to Administration Global Settings > Account and click **Integration: Import/Export**.
2. In the Import/Export screen, click the **All data in MySQL format** link.
3. In the **Choose which tables to exclude** list, select any tables to exclude from the MySQL file.

✓ **Tip:** If you only want to include a small number of tables, first click **Select all** to exclude all tables, and then select the tables you want to include. In addition, audit trail information can comprise a significant amount of a table's size. If you do not need audit trail information, select the "Suppress the audit field data" option, which may significantly reduce the size of the generated file, and generate results more quickly.

✗ **Warning:** Some tables, such as **by_day**, are excluded from MySQL exports. These tables can be exported using the Automatic Backup Service (ABS). For more information on ABS, see [Automatic Backup Service](#).

4. Click **Export**. OpenAir will create a ZIP file containing the generated data.

Global Settings Import/Export

Export data as MySQL file

Click the "Export" button at the bottom of the form to create a MySQL file for version 5.3.12 of MySQL. This file can be imported into a MySQL database where queries and reports can be run against it.

Choose which tables to exclude

ALL	SELECTED
283	0

Search ...

[Select all](#) [Clear all](#)

- account
- accounting_period
- accounts_payable
- actual_cost
- address
- adhoc_report
- agreement

Cancel Export

5. Click the **Click here** link to download the ZIP file with your data.

Global Settings Import/Export

A ZIP file containing all the data was generated.
[Click here](#) to download the file

Exporting Your Account-Specific WSDL

You can export the WSDL specific to your account, which includes custom fields configured on your account. Account administrators and users with the Export data role permission and relevant access can use a short URL to download the file automatically.

To export your Account specific WSDL:

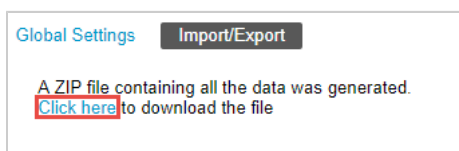
1. Go to Administration Global Settings > Account and click **Integration: Import/Export**.
2. In the Import/Export screen, click the **Account specific WSDL** link. Your account-specific WSDL will open in your browser.

Exporting the XSD Schema Files

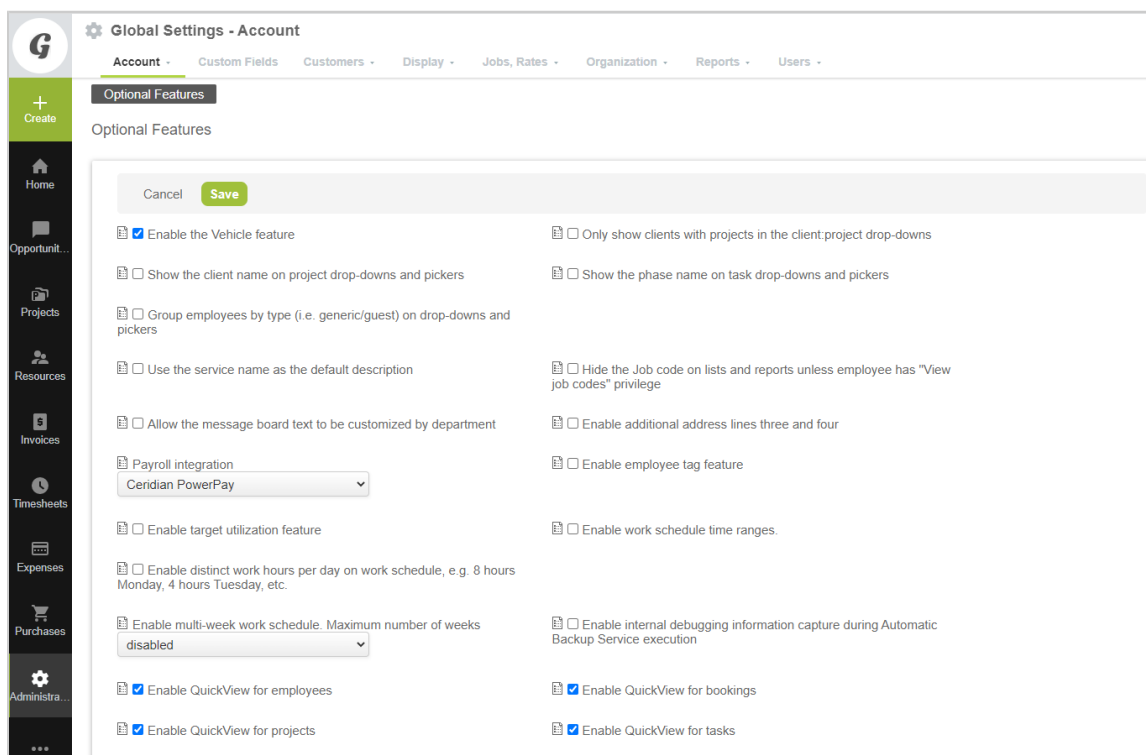
Use this feature to export the XSD schema files without the need to contact OpenAir Support.

To export the XSD schema files:

1. Go to Administration Global Settings > Account and click **Integration: Import/Export**.
2. In the Import/Export screen, click the **XSD schema files** link. OpenAir will create a ZIP file containing the generated data.
3. Click the **Click here** link to download the ZIP file with your data.



Optional Features



The Optional Features section contains options that impact general system usage and add features to entities such as Employee records. See [Users](#).

To access Optional features:

1. Go to Administration > Global Settings > Optional features.

Enable the Vehicle feature: When enabled, Vehicles display in the list of Application Settings under Invoices Settings and Expenses Settings. When one or more vehicles are set up in the system, a Vehicle drop-down list is available on mileage receipts in the Expenses application and on mileage expense charges you create in the Invoices application. See [Vehicles](#) under Expenses for information on creating a vehicle in the system.

Only show Clients with projects in the client:project drop-downs: In many areas of NetSuite OpenAir, the client and project field is concatenated into a Client:Project drop-down menu. Enabling this option populates the drop-down selections with clients that have a projects so you get a consistent Client:Project value set. When this option is not enabled, client names without projects also display in the drop-down menus such as Client X, Client X:Project Y. Displaying Clients without projects supports a design of recording time and expenses, handling resource allocation, and invoicing at the client only level.

Show the client name on project drop-downs and pickers: When writing reports or setting up filter sets, a pick list displays with projects. If this option is enabled, the client name also displays at the end of the project name in these lists in parenthesis such as Project Y(Client X). If this option is disabled, only the project name displays.

Show the phase name on task drop-downs and pickers: When handling time recording or resource allocation at the task level, this option enables the system to include the phase name in parenthesis after the task name such as Task Y(Phase X). This is helpful if you have tasks with the same name within a project allocated to different phases [i.e., Design (Pilot), Design (Production)]. When this option is disabled, only the task name displays. Therefore, it is very important that task names are unique and clear.

Group employees by type (i.e., generic/guest) on drop-downs and pickers: This option provides a sorting or ordering approach to your employee based drop-downs so that different resource types (e.g., Regular, Guest, Generic) appear in groups within the menu. When enabled, generics and guests generally appear at the bottom of the menus, with each group ordered alphabetically. When disabled, generics and guests are listed within the regular employee list in alphabetic order with an identifier (generic or guest) after the employee name.

Use the service name as the default description: Throughout OpenAir, services are typically used to track categories of labor or accounting allocation information. However, there is no restriction on what a service can be used for within the system. Due to its unique handling within NetSuite OpenAir regarding its inclusion on timesheets and invoice charges, your system configuration may include using a service for something unique to your organization. The name of a service may align with how you view information for display on invoices, for example. In this case, instead of entering the description information separately as part of a billing rule or charge creation, you may enable this option to reuse the service name. Enabling this option usually assumes that time is tracked to a task level, and that either the time entry or the task itself holds a service. When this option is disabled, you must manually enter the description field.

Hide the Job code on lists and reports unless employee has "View job codes" privilege: With the ability to use the job code in many report filtering options and to be able to override the job code field name using terminology override, the job code becomes an area that may be used to capture sensitive information related to a person's job category or level. This is information that, more likely than not, should not be available to everyone in the organization. If you have configured OpenAir to have sensitive information in this area, you can use this option so that employees who have permission to view job codes may only view the job code value of his/her own record. With this option enabled, the job code field is hidden throughout the system such as on reports and in the customized page lists. If this option is disabled, then the job code is available throughout the system as a regular field on reports and customize lists which support the field.

Allow the message board text to be customized by department: The Home application has a central Message Board that is used to communicate to employees of the system. In many cases, more than one department in a company may be set up to use the OpenAir environment and they can be performing

different functions. For example, Sales and Operations may be using timesheet entry but the data entry policies for those two departments may be different. Setting up departments within OpenAir lets you allocate employees to a specific department. The Message Board text by department option gives you the ability to set up message board communications to specific groups of employees. The text is entered in the Departments entity and overrides the general message board content. See [Departments](#). If you have this option selected and no specific department text has been created, the general message board text is visible. If this option is not enabled, the general message board is visible to all employees.

Enable additional address lines three and four: This option expands the Client and Employee address fields to allow for a 3rd and 4th line, which displays on formatted reports such as invoices or timesheets.

Payroll integration (drop-down list): OpenAir enables the integration with the following payroll systems: Ceridian PowerPay, Paychex, ADP-PCT and ADP-NobleStar. This is an optional service providing your company subscribes to the payroll systems.

Enable employee tag feature: The employee tag feature enables the tracking of custom field information in a defined tag field over time. Each tag entry is associated with a timeframe (current or start/end date). As with custom fields, you may define as many tag groups as you need with as many values in each tag group as you need. The enabling of the tag group feature displays a tag link on the Employee accounts for value setting. Tag groups may be used to filter information on reports. See [Tag Groups](#) and [Employee Entity Tag](#).

The main differences between employee-based custom fields and tag groups are:

- Tag group values are tracked over time
- Tag groups may be restricted from viewing within an employee's role in the system

Custom fields may also be restricted from viewing within an employee's role. However, this must be done through form permissions and still give employees the ability to view custom field information in reports. Custom fields also do not track values over time. When the field is set or changed, that is the field value for current and historical reporting.

Enable target utilization feature: The target utilization feature enables the tracking of an employee's utilization % target in a defined field over time. Each utilization entry is associated with a timeframe (current or start/end date). The enabling of the target utilization feature displays a Target Utilization link on the Employee accounts for value setting. See [Target Utilization](#).

Enable work schedule time ranges: The overall use of this optional feature is to control resource bookings from a start time point in a day. For example: If a workday is defined as 8:00 a.m. to 4:00 p.m. and an employee is booked to work 100% of the time starting at 10 a.m. for the day, the number of hours would compute to 6 hours of effort. To use this feature, you must set up work schedules in the system to have a start/end time definition per day and an optional override at the employee work schedule level on the start/end time of the day. See [Work Schedules](#).

Enable distinct work hours per day on work schedule, e.g. 8 hours Monday, 4 hours Tuesday, etc.: enables work hours to be scheduled for a different number of hours for each work day. When reports use work schedule hours, the hours vary based on the work schedule. For any report where hours are converted to days, the average hours for the week is used for the calculation. When enabled, the work hours per day can be assigned to both work schedules and to individual employees.



Important: Varying the work hours per day definition impacts daily billing rules. If the day is defined as 4 hours and an 8 hour workday is entered on timesheets, the billing rules treats this as 2 days of work.

Enable multi-week work schedule. Maximum number of weeks: The multi-week work schedule feature enables using a varying work schedule that spans several weeks. For example, a schedule may be 4 10-hour days, 1 4-hour day in week one and 5 8-hour days in week two. This enables resource managers to know exactly when resources are available based on varying weekly work schedules. Choose Disabled or 2-, 3- or 4 weeks as the duration of the varying schedule.

Enable internal debugging information capture during Automatic Backup Service execution:

Useful for OpenAir engineers to debug Automatic Backup Service (ABS) problems.

Performance

The performance page (or performance console) lets you set up criteria to avoid running auto-billing , auto-recognition, and project recalculation for completed projects.

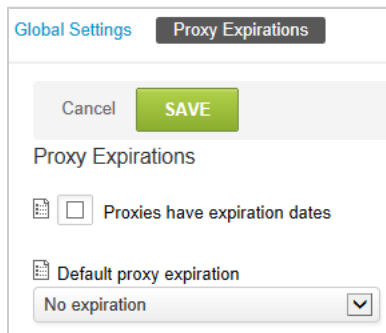
With these settings, projects which have not created billing or revenue recognition transactions for several months will have their auto-billing and auto-recognition alerts run less frequently or will be deactivated by OpenAir. The default settings are:

- If no transactions have been created for the past 120 days, and the auto-run alert was set to run either every day, on the 1st and 15th of every month, or on the 15th and last day of the month, the auto-run alert is rescheduled to run only once per month.
- If no transactions have been created for 400 days, the auto-run alert is deactivated.

You can adjust the thresholds for OpenAir to stop running auto-billing and auto-recognition. You can also set criteria for when OpenAir will skip running project recalculations. This prevents OpenAir from performing recalculations which are no longer necessary, and improves performance.

Only account administrators and users with the “Perform company maintenance functions” role permission can access the Performance page (Administration > Global Settings > Account > Performance). For more information about configuring the performance console, see [📄 OpenAir Performance Tuning Guide](#).

Proxy Expirations



The Proxy feature within OpenAir enables an employee permission to login and act as another employee in the system without the need of the other employee's password. See [Log in as....](#)

To access Proxy expirations:

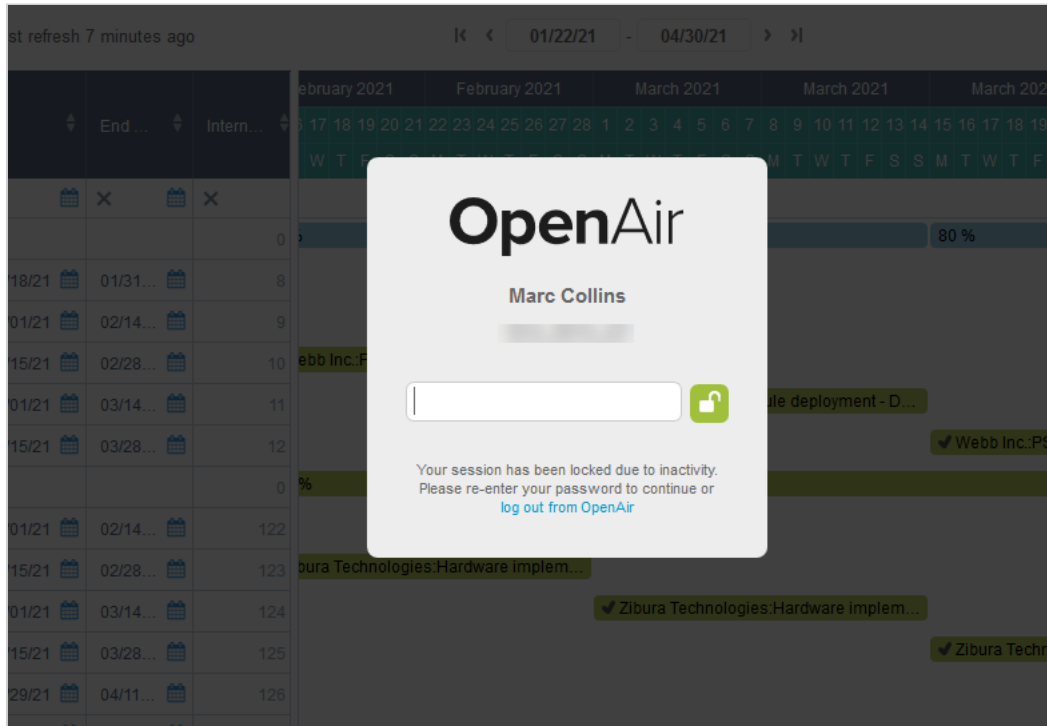
1. Go to Administration > Global Settings > Proxy Expirations.

Proxies have expiration dates: The expiration option lets you control how long a proxy can be active or used. This feature is useful when setting up a proxy for an employee covering another employee's tasks while they are on vacation or on leave. Enabling this feature requires you to identify the default proxy expiration. If this feature is active and No expiration is set as the default, then the proxy setup functions as if the expiration feature was turned off. This may be overridden for each proxy set up within an employee account. If an expiration date is set up with the proxy, the expiration happens at midnight of the account time zone leading up to the date that is set.

Default proxy expiration: The other selections from the drop-down list for expiration include various time periods, which will allow OpenAir to compute an expiration date for the proxy from when it was initially created for an employee.

Security

Security focuses on protecting your OpenAir environment from employees trying to access the system without proper permission or the sharing or showing of information to others. The OpenAir session locks out if there is no user interaction within a set period and requires users to enter their passwords. After another set period, the user is logged out and the page redirected.



To access Security:

1. Go to Administration > Global Settings > Security.

Employee log in support email address: OpenAir Support does not provide assistance to employees that cannot access the system (i.e., the resetting of passwords or the unlocking of accounts). However, if you supply an email address in this field, OpenAir Support will direct employees to your company's defined Help email address for these matters.

Session timeout: This option controls the time a session may be inactive before the employee is automatically locked out and prompted to re-enter their password. Session timeout avoids OpenAir sessions from being used by others on a shared machine. Session timeouts should be set according to the data security policies your company has in place. The default and maximum period for the Session timeout is 5 hours.

Redirect user's page after timeout: This option controls the time a session may be locked out before the employee is automatically logged out and redirected. The employee will be redirected either to the OpenAir login page or to the alternate URL configured in Administration > Global Settings > Integration: SAML Single Sign-On, if this feature is enabled on your account. This option can be set to "On timeout" or

to a finite period up to a maximum of 6 hours. It should be set according to the data security policies your company has in place.

Failed logins to allow before locking employee: Employee lockout is a security feature that ensures employees have an active account and have knowledge of the password to access OpenAir. Setting lockout attempts works in conjunction with your password policy. If you require a complicated password, i.e., over 8 characters long with a mixture of alpha and numeric and upper and lower cases, you may want to consider allowing more attempts before having an employee locked out. If you have a simple password policy, you may want to restrict the number of attempts before lockout.

Note: Locked employees see the same on-screen error message on the OpenAir login screen whether the employee credentials are invalid or the employee is locked out of OpenAir.

By default, OpenAir sends a lockout notification email to the employee when the employee exceeds the number of login attempts permitted.

Lockout notification email can be disabled for your account. To stop OpenAir sending lockout notification email to employees being locked, contact OpenAir Support.

Send employee lockout notifications to this email address: The email address supplied in the "Send employee lockout notifications to this email address" receives a notification that an employee has been locked out when the number of attempts has been exceeded. The email notification includes the employee's name so System Administrators within your company can follow the password reset procedures. This is typically an unlock with sending an email notification to the employee or a password reset and verbal or email notification of the reset. OpenAir Support is not allowed to unlock employees, so having a company administrator email address is recommended.

Note: Create an email distribution list if you have more than one office location or department using the system. Appoint ownership of various general employees to specific employees on this distribution list or allow a primary and backup support structure within your environment.

The screenshot displays the 'Global Settings - Account' page with the 'Security Options' tab selected. The page features a sidebar with navigation icons for Home, Opportunities, Projects, Resources, Invoices, Timesheets, Expenses, Purchases, and Administration. The main content area contains the following settings:

- Cancel** **Save**
- User log in support email address:** [Text input field]
- Session timeout:** [Dropdown menu showing 5 Hours]
- Redirect user's page after timeout:** [Dropdown menu showing 6 Hours]
- Failed logins to allow before locking employee:** [Dropdown menu showing Unlimited]
- Send employee lockout notifications to this email address:** [Text input field]
- Custom error message for password questions:** [Text area]
- Passcode for secured short URLs:** [Text input field]
- Cancel** **Save**

Frequently Asked Questions (FAQs)

What is the recommended timeout setting?

If you factor in that employees of OpenAir fall into different categories such as power employees who are in the system all the time and timesheet employees who are in the system perhaps one time a week, you should select a value that will not inhibit the power employee audience. This is generally a 30 minute to 1 hour window.

How can I send notifications to multiple people?

The lockout notifications are sent to the emails noted in the "Send employee lockout notifications to this email address" field, provided they are separated by semi-colons. However, depending on how long your email addresses are within your company, you may be able to enter only one to three. A better option would be to set up an email distribution list and use this in the notification field. Then your distribution list can be expanded as your list of contact employees grows or modified as your organization changes.

Reports

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Reports. The following lists them in the order in which they display on the Global Settings window.

- [Custom Calculations Overview](#)
- [Custom Time Ranges](#)
- [Enabled features](#)
- [Reporting Options](#)

Custom Calculations Overview

Custom calculations			
Custom calculations	Renamed Built-in summary fields	Custom detail fields	Renamed Built-in detail fields
Title	Left operand	Operation	Right operand
All	All	All	All
Projects Contract discrepancy	Projects - All assigned hours	minus	Timesheets - Approved hours
Invoices/expenses ratio	Invoices - Total	divided by	Expenses - Total
Projects Total cost	Timesheets - All actual cost [primary loaded cost]	plus	Expenses - Total
Projects Billing margin (\$)	Invoices - Total	minus	Projects Total cost
Projected billing less billed	Projects - Projected billing [rules]	minus	Invoices - Total

OpenAir comes with a number of standard value fields, but you may find that there are other values you would like to track such as fields related to projects, employees, resources, and expenses to name a few. Or, there may be some standard value fields that you would like to rename for reporting purposes, using your company's terminology. OpenAir addresses your needs by allowing you to create custom calculated fields and renamed built-in fields.

To access Calculated Fields:

1. Go to Administration > Global Settings > Custom calculations. Select the type of calculated field link you wish to use.
2. To view or modify an existing calculated field, select the appropriate field link under the Title column.
3. To add a new calculated field, select New and one of the options available in the drop-down list.

Refer to the following sections for more information.

- [Custom Calculations](#)
- [Custom Detail Fields](#)
- [Renamed Built-In Detail Fields](#)
- [Renamed Built-In Summary Fields](#)

Custom Calculations

Custom calculations

Custom calculations Renamed Built-in summary fields Custom detail fields Renamed Built-in detail fields

Cancel SAVE SAVE & CREATE ANOTHER

Module Expenses Entity Employee Type Summary

Left operand Approved Operation no operation Right operand Approved

Title

Description

☒ Active custom calculation

The Custom calculations option lets you define additional value fields for specific objects within OpenAir. Custom calculated field values are only displayed in Summary reports. When selecting what type of custom calculated field to make, the drop-down selection under the New menu corresponds to the type of summary report the calculation will be found in after it is made. For example, if you select an Account-wide project custom calculation, the resulting calculation can be found when you create a report from the account-wide projects section of summary reports. You are also able to use custom detail fields as constants in Custom calculations.

Calculated fields allow you to take two value fields and apply an operation on one from the other such as Expenses Approved minus Expenses Submitted. When a custom calculated field is created and associated with an object in OpenAir, it cannot be changed to another object. See [Custom Calculations Overview](#).

When you create custom calculations, you need to decide on the main value you want to use in the custom calculation. For example, do you want to use money values related to Invoices or hours related to Timesheets, or both? This decision helps you determine whether you are choosing an Account-wide custom calculation or a application-specific custom calculation. The Account-wide selection provides the most flexibility in creating custom calculations. The entity determines where the value is stored in OpenAir.

To create a Custom calculation:

1. Go to Administration > Global Settings > Custom calculations.
2. Select the custom calculation type from the **Create Button**.
The New custom calculation form displays.
3. Next, decide on the Left operand, Operation and Right operand. Operation values include: plus, minus, times and divided by.
4. The Title is the name you provide for the custom calculated field. The custom calculated field title is automatically prepended with the entity name (e.g., Employee - Invoiced hours).

Note: The check box **Do not automatically prepend module name to title in account-wide report** is only available when selecting Account-wide custom calculations. By selecting this check box, the entity name does not appear in the name of the custom field when selecting it as a value in the Summary reports.

5. A description may be added.
6. An Active custom calculation checkbox is available.
7. Click Save.

Custom Detail Fields

The screenshot shows the 'Custom detail fields' configuration window. At the top, there are four tabs: 'Custom calculations', 'Renamed Built-in summary fields', 'Custom detail fields' (which is selected), and 'Renamed Built-in detail fields'. Below the tabs, there are 'Cancel' and 'SAVE' buttons. The main configuration area includes:

- Association:** A dropdown menu set to 'Project'.
- Function:** A dropdown menu set to 'AVERAGE'.
- Title:** An empty text input field.
- Arguments for AVERAGE:** A section with two columns. The 'Available' column lists various fields like 'Approved days', 'Approved hours', 'Assigned days', etc. The 'Selected' column is currently empty. Below these columns are buttons: 'Add selected >' and 'Add all >' on the left, and '< Remove selected' and '< Remove all' on the right.

The Custom detail fields option lets you define additional value fields for specific objects within OpenAir. You can display Custom detail field values in Detail reports.

Custom detail fields allow you to create a new value field from standard value fields within a particular application. When a custom detail field is created and associated with an object in NetSuite OpenAir, it cannot be changed to another object. You can bring custom detail fields in as separate columns in summary reports.

You need to select the entity value you want to use from the New drop-down list. For example, are you creating a custom field based on the Project stage or Booking? The entity determines where the value is stored in OpenAir.

To create a Custom detail field:

1. Go to Administration > Global Settings > Custom calculations.
2. Click the Custom detail fields link.
3. Select the new custom detail field type from the **Create Button**.
The New custom detail field form displays.
4. Next, choose the Function. Function choices include: AVERAGE, CONCATENATION, CONSTANT, DATE_DIFF, DIFFERENCE and SUM. Not all function types are available for the various application entities. For example, if the entity is a text field, your function choices are limited to CONCATENATION and DATE_DIFF.
5. The Title is the name you provide for the custom detail field.
6. Depending on the application entity chosen and the function, the form varies:
 - If the function is AVERAGE, an Available numeric area displays where you can select the numeric values to be used in the average and move them to the Selected numeric area.
 - If the CONCATENATION function is selected, a Text template area displays. You are able to add straight text and use standard field values. To select standard field values, choose the appropriate value from the Field drop-down list. Then copy and paste the value shown in the text box below the drop-down list into the Text template. It may be something like the following: %%approval_history%%
 - If the CONSTANT function is selected, you need to enter the value of the constant. The other argument for the constant function is the Resulting field type. Choices include: hours, days, quantity, and ratio. The constant custom detail fields can be used in custom calculations and in summary reports. This functionality is currently limited to transaction fields, such as Project billing transactions or Time entries.
 - If the DATE_DIFF function is chosen, the arguments area displays Date 1 minus Date 2. Both date fields are drop-down lists with the date fields available for the entity selected.
 - If the function chosen is DIFFERENCE, the arguments area displays Minuend minus Subtrahend. The minuend and subtrahend fields are drop-down lists that contain the numeric data values for the entity selected.
 - If the function is SUM, an available numeric area displays where you can select the numeric values to be used in the sum and move them to the Selected numeric area.

Renamed Built-In Detail Fields

Built-in detail fields

Custom calculations Renamed Built-in summary fields Custom detail fields **Renamed Built-in detail fields**

Cancel **SAVE** **SAVE & CREATE ANOTHER**

Association
Project
Built-in title
% Complete

Customized title

▼ 'Summary Reports' detailing options
☐ Suppress Optional 'Summary Report' suffix

OpenAir gives you the capability to Rename built-in detail fields for reporting purposes, using your company's terminology. You can also bring these Renamed built-in detail fields in as columns on summary reports.

To create a Renamed built-in detail fields:

1. Go to Administration > Global Settings > Custom calculations.
2. Click the Renamed Built-in detail fields link.
3. Select the standard field that you want to rename from the **Create Button**.
The Rename built-in detail field form displays.
4. The Built-in title drop-down list provides a list of fields available to be renamed that are associated with the entity chosen.
5. After choosing the Built-in title field, enter the new Customized title. For example, Project owner may now be called Project Manager.
6. Under Summary Reports detailing options, if desired, select the check box to **Suppress Optional 'Summary Report' suffix**.
7. Click Save.

Renamed Built-In Summary Fields

Custom calculations

Custom calculations Renamed Built-in summary fields Custom detail fields Renamed Built-in detail fields

Cancel SAVE SAVE & CREATE ANOTHER

Module Built-in title

Projects Actual
revenue
margin

Customized title

☐ Do not automatically prepend module name to title in account-wide reports

OpenAir gives you the capability to Rename built-in summary fields for reporting purposes, using your company's terminology. You can use these Renamed built-in summary fields in Summary reports.

To create a Rename built-in summary fields:

1. Go to Administration > Global Settings > Custom calculations.
2. Click Renamed Built-in summary fields.
3. Select the summary field that you want to rename from the **Create Button**.
4. The Built-in title drop-down provides a list of fields available to be renamed that are associated with the entity chosen. After choosing the Built-in title field, you enter the new Customized title. For example, you can change Project billing hours to Billed Hours.
5. Select the check box for: Do not automatically prepend application name to title in account-wide reports if you don't want the application name prepended to the title. If you do not select

this check box, the calculated field displays in the value selection in summary reports with the application name before it. For example, it could read Timesheets - [NAME OF CALCULATION].

6. Click Save.

Custom Time Ranges

OpenAir lets you create custom time ranges to use in Summary reports and in Advanced resource reports and Invoice-Income received reports. Each report has a period field that sets the time range for the report. The OpenAir application comes with built-in time periods such as Weekly, Monthly, Annual, etc. Custom time ranges allow for custom periods to be created based on specific company needs (such as a 4-4-5 calendar). When created, they are available for use in time period specific reports. A typical use of custom time ranges is if you report upon a fiscal monthly period that does not coincide with calendar months.


To create Custom time ranges:

1. Go to Administration > Global Settings > Custom time ranges.
2. Select **New Custom time range** from the **Create Button**.
3. Enter the Custom time range name.
4. Next, add Time period names and Time period start dates. You must have at least two periods and dates, because the last date you enter is actually only used to calculate the end date of the previous period. The end date of each period is set to one day before the start date of the next period. If you do not name each time period, the name defaults to the start and end dates.
5. If you need to add more periods and dates, click Add Rows and select the number of rows to add.
6. Click Save.

Enabled features



The Enabled features view lists OpenAir features which can be enabled or disabled by account administrators for each OpenAir application or by OpenAir support at the account level.

The listed features can be one of the following types:


- **Application** — Application settings are controlled by account administrators in the OpenAir Administration module (Administration > Application Settings > [Select an Application] > Other Settings). These features are described in this guide. See the chapters describing each OpenAir application.
- **Internal** — Internal settings control the optional features which can be enabled for your account by OpenAir Support. These features are described in the  [OpenAir Optional Features Book](#).

The view includes the following information for every listed feature:

- **Name** of the feature — To read more about the feature, click the feature name. The OpenAir Help Center opens in a new browser window or tab and takes you directly to the relevant help topic.
- The OpenAir release date when the feature was **Introduced**.
- The **Area** indicates which OpenAir application the feature relates to or whether it is global feature.
- Whether the feature is **Enabled in account** (green square icon) or **Disabled in account** (red square icon). To read about requesting an optional feature to be enabled for your account, click **Disabled in account**. For Application settings, this link points to the help topic describing the feature.











 **Note:** Some optional features shown as **Enabled in account** require additional Administration settings. Click the feature name or refer to the  [OpenAir Optional Features Book](#) for more information.

- The feature **Type** — Application or Internal.

 **Note:** You must be an administrator or have the **View Enabled Features** role permission to access the enabled features list.

You must be an administrator or have the **View Help Center** role permission to click the links and access help topics describing the features.

Global Settings **Enabled features**

Name	Introduced	Area	Enabled	Type
All	All	All	All	All
Redesigned OpenAir User Experience	04/14/18	Global	 Enabled in account	Internal
Redesigned OpenAir User Experience Phase 2	10/13/18	Global	 Enabled in account	Internal
Redesigned OpenAir User Experience Phase 3	04/13/19	Global	 Enabled in account	Internal
Remember the last used "New timesheet" form settings	11/01/03	Timesheets	 Disabled in account	Application
Remove blank timesheet rows	04/22/03	Timesheets	 Disabled in account	Application
Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata	04/14/18	Global	 Enabled in account	Internal
Report Management	10/17/15	Reports	 Enabled in account	Internal
Report on More than 31 Days When Reporting on Daily Time Periods	11/21/09	Reports	 Enabled in account	Internal
Report Throttling	05/17/14	Reports	 Enabled in account	Internal
Require "Hours remaining" estimates for all tasks	01/07/02	Timesheets	 Disabled in account	Application

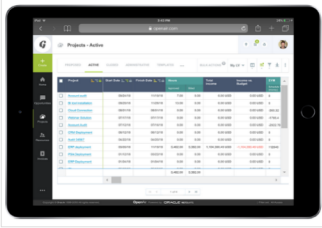
10 rows on page
401 total rows

Prev 27 28 29 30 31 Next

OpenAir Optional Features Book > Global

Redesigned OpenAir User Experience Phase 2

With this feature, Project, Project Task, Booking, and Expense list views, and the list view toolbar have received a makeover, making them more user friendly and visually striking. The record header and in-record navigation have been redesigned and relocated in order to gain more screen real estate.



Redesigned List views

Redesigned list views make the best use of the available canvas space to show more data and give you access to improved and new functionality:

- The **list view toolbar** is slimmer, slicker and gives you access to old and new list view tools and configuration options. Screen navigation, Bulk actions, Saved list view configurations, Column Selections, Advanced filters and Download list data are all available and improved.

To open the Enabled Feature's View:


1. Go to Administration > Global Settings > Reports and click Enabled features.

To sort or filter the list of features:

1. Click the dropdown list under the column heading to sort or filter by and select an option.


To learn what a feature does:

1. Click on a feature's name in the list view to open an OpenAir Help Center article briefly describing that feature.

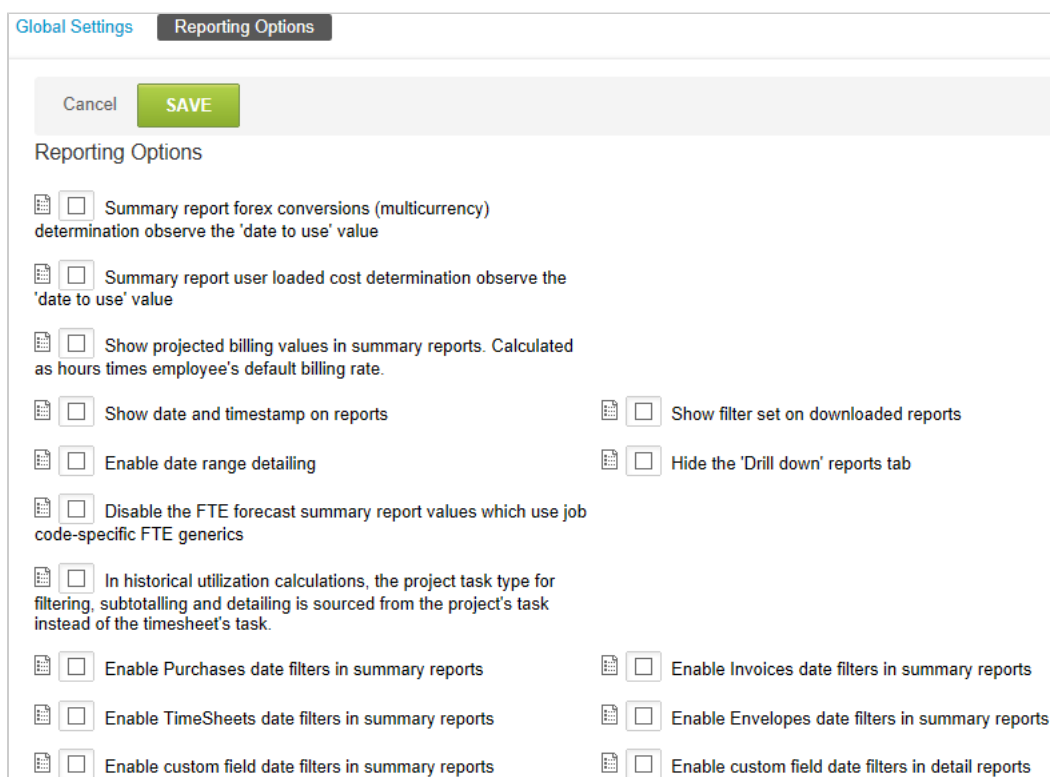
 **Note:** This feature requires the **OpenAir Help Center** feature.

To learn how to request an account-level feature by opening a Support Case:

1. Click the "Enabled in account" or "Disabled in account" status message.

 **Note:** This feature requires the **OpenAir Help Center** feature.

Reporting Options



Global Settings Reporting Options

Cancel SAVE

Reporting Options

- ☐ Summary report forex conversions (multicurrency) determination observe the 'date to use' value
- ☐ Summary report user loaded cost determination observe the 'date to use' value
- ☐ Show projected billing values in summary reports. Calculated as hours times employee's default billing rate.
- ☐ Show date and timestamp on reports
- ☐ Show filter set on downloaded reports
- ☐ Enable date range detailing
- ☐ Hide the 'Drill down' reports tab
- ☐ Disable the FTE forecast summary report values which use job code-specific FTE generics
- ☐ In historical utilization calculations, the project task type for filtering, subtotalling and detailing is sourced from the project's task instead of the timesheet's task.
- ☐ Enable Purchases date filters in summary reports
- ☐ Enable Invoices date filters in summary reports
- ☐ Enable TimeSheets date filters in summary reports
- ☐ Enable Envelopes date filters in summary reports
- ☐ Enable custom field date filters in summary reports
- ☐ Enable custom field date filters in detail reports

Reporting options settings provide system-wide controls on the appearance of OpenAir reports and functions available in the Reports application. The Reports application also contains an Options tab which has other settings that affect the appearance of reports. See [Reporting Options](#).

To access the Reporting options:

1. Go to Administration > Global Settings > Reporting options.

Summary report forex conversions (multicurrency) and employee loaded cost determination observe the 'date to use' value: Selecting this option enables the dates specified in the **date to use** drop-down lists in Summary reports to determine the correct rate to use in foreign currency conversions on a report. Employee-loaded costs in foreign currencies are also forced to use the rate found on the date to use date.

Summary report user loaded cost determination observe the 'date to use' value: Enable this setting to have loaded cost get its loaded_cost value from the 'date to use' setting. Without this feature, for accounts that leveraged the "Summary report forex conversions (multicurrency) and user loaded cost determination observe the 'date to use' value" feature, the date used applies to both the loaded cost report values as well as the forex conversions. The date selected will be used as the reference for when a report value uses a loaded cost value as well as report values that use forex conversions.



Note: When this feature is enabled, users can choose to only apply the 'date to use' value to either the forex conversion or the loaded cost values.

Show projected billing values in summary reports. Calculated as hours times employee's default billing rate: Projects-projected billing fields if multi-currency are available in Summary reports. The hours used in the computation of the field are determined by the charge projection feature activated within the Project Application Options tab. The charge projection feature by default uses the defined hours as virtual timesheets and forecasts financials based on existing billing rules on the project. When you select this check box, it overrides the charge projection feature value by using the employee's hourly billing rate value instead of any rate defined on billing rules.

Show date and timestamp on reports: Checking this option displays a Generated on date timestamp at the bottom of each report.

Show filter set on downloaded reports: If you are using Filter sets to limit or narrow access to various data values, i.e., a set of clients or employees, this option displays the filter set on the report to clarify the content presented.

Enable date range detailing: Selecting this option enables new date ranges available within custom detail calculations using the Date_Diff function. When enabled, the Date_Diff function can use date ranges such as Today, Last week, and This Month. For example, a custom detail calculation field called Days to Completion would be calculated as Calculated finish date minus Today.

Hide the 'Drill down' reports tab: Drill down reports allow reporting with hierarchies and a drill down capability into the various levels of the defined hierarchy. If you are not using hierarchies, it is recommended to hide the drill down tab since no additional capabilities are available to report employees.

Disable the FTE forecast summary report values which use job code-specific FTE generics: The FTE forecast summary report calculates amounts based on the loaded cost for the Job code. If a generic resource is selected on the job code, costs are calculated on projects that have a generic resource assigned using the work schedule. Choosing this option prevents these costs from being calculated for generic resources and possibly skewing the data presented in the report.

In historical utilization calculations, the task type for filtering, subtotalling and detailing is sourced from the project's task instead of the timesheet's task: When calculating historical utilization, by default the Task type value is taken from the timesheet. If this option is selected, the current task type value from the task is used in the calculation instead of that from the timesheet.

Enable Purchase date filters on summary reports: Selecting this option provides a number of date filters to be available for Purchases data in the Summary reports form.

Enable Invoices date filters on summary reports: Selecting this option provides a number of date filters to be available for Invoices data in the Summary reports form.

Enable Timesheets date filters on summary reports: Selecting this option provides a number of date filters to be available for Timesheets data in the Summary reports form.

Enable Expense reports date filters on summary reports: Selecting this option provides a number of date filters to be available for Expense report data in the Summary reports form.

Enable custom field date filters on summary reports: Selecting this option provides a date filter for Custom date fields that you have created for your company to be available in the Summary reports form.

Enable custom field date filters on detail reports: Selecting this option provides a date filter for Custom date fields that you have created for your company to be available in the Detail reports form.

Custom Fields

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Custom Fields. The following lists the types of custom fields you can create. Each is addressed in the following sections of the guide.

- [Allocation Grid](#)
- [Checkbox](#)
- [Currency](#)
- [Date](#)
- [Dropdown](#)
- [Dropdown and Text](#)
- [Hours or Days](#)
- [Multiple Selection](#)
- [Numeric](#)
- [Radio Group](#)
- [Tag](#)
- [Text](#)
- [Text Area](#)
- [Sequence](#)
- [URL](#)

Custom Fields Overview

OpenAir comes with a number of standard fields but you may find that there are other items you would like to track throughout the system. To accommodate this, you can define additional fields for specific objects in OpenAir.

Custom fields display in a group based on the entity association and application. The group defaults to the bottom of the specific form on which they display. Form permission rules help in hiding or showing certain custom fields given certain events. Details include:

- For each custom field, you must define a name that contains no spaces. You may use underscores. This name is used within the OpenAir database.

- You must also include a description of the field and a display name that employees see on the form.
- You may also enter a hint that displays below the field explaining the intended use of the custom field.
- When creating a custom field, you associate it with a particular object in OpenAir. The Association dropdown appears all areas of OpenAir where you may create custom fields.
- When a custom field has been created and associated with an object or form in OpenAir, it cannot be changed to another form or object.

Note: You can create custom fields associated with project employee combination rate records used for project employee billing and project billing. When creating the new custom field, select Uprate (API only) from the **Add custom field to** dropdown. The Uprate (API only) entity appears under Global in the dropdown. The custom field will be available through the OpenAir XML API and SOAP API only. It will not be available on any form in OpenAir.

To view, modify, or create a Custom Field:

1. Go to Administration > Global Settings > Custom Fields. To view or modify an existing custom field, select the appropriate field link. See the following steps to create a custom field.
2. To add a new custom field, select **New Custom field** from the **Create Button**.
3. Select the entity the custom field is associated with along with the type of field you are creating. Click Continue.
4. Type the Field name. This is required. The name cannot have any spaces, but you can use underscores.
5. Select the Active check box.
6. Type a Description. This is optional and is used for adding information about the new custom field.
7. Type the Display name. This is what displays on the form associated with the entity.
8. If desired, type a Hint to help your OpenAir employees understand the intent of the custom field.
9. If you select the Required check box, the field is required on the form and the form cannot to be saved without supplying a value.
10. If you select the Unique check box, a unique value must be entered in the field to be able to save the form.
11. If you select the check box to Hide on data entry forms, this custom field does not display on the form.
12. If you select the check box for Add Notes, a text box appears under the custom field for employees to add any additional notes.
13. If you select the check box for Divider, a divider line appears before the custom field. You can also type Divider text that displays in the Divider Line.

Note: You may want to use Divider lines when you are defining a new section that needs to stand out on the form. For example, a series of custom fields defining a topic such as contract management may start with a Contract received check box. The divider line indicates the start of the contract management fields.

14. Click Save. After you save the form, a Position field appears. Position determines the order of the custom field on the entity's form. To change the position, adjust the value using the dropdown and click Save.

Each type of custom field is addressed in the following sections. They follow the steps outlined previously, but each type of custom field also has some unique entry considerations.

Allocation Grid

For: Action item, Allocation Grid field

Field name
 ☒ Active

Required, no spaces allowed

Description

Description of this custom field

Association
Action item
 Select what entity you want to add this field to

Display name

You must enter a title to display on forms

Hint

Hint text will display on forms

Value list

Enter the values to allocate against

☐ Allocations must equal 100%
 At least one allocation must be entered for this to be enforced

☐ Hide on data entry forms
 Check to hide this field on data entry forms

☐ Add notes
 Check to include an associated notes field

☐ Divider
 Check to include a divider line before this field

Divider text

Text to include in the divider

You can create a custom field used in an Allocation Grid. Allocation grids can be helpful in a number of use cases, but typically only work for small clients because of the amount of maintenance they require and how they work in reporting. The allocation grid custom field lets you automatically report on a percentage of a number, where the percentage is stored in the allocation grid, and each value/row in the grid becomes its own reporting column.

Some of the uses of the allocation grid are for commissions when there is a small sales team and to proportion revenue among departments. For example, you might split revenue 60/40 or 50/50, regardless of employees who actually performed the revenue. The allocation grid has the ability to split transactions across the assigned percentages within summary reports. OpenAir supports a feature for SFDC Opportunity Product Line to OA Allocation Grid.

Checkbox

For: Action item, Checkbox field

Field name
 ☒ Active

Required, no spaces allowed

Description

Description of this custom field

Association
Action item
 Select what entity you want to add this field to

Display name

You must enter a title to display on forms

Hint

Hint text will display on forms
☒ Checked

Check to turn this field on by default when the record is created
☐ Hide on data entry forms

Check to hide this field on data entry forms
☐ Add notes

Check to include an associated notes field
☐ Divider

Check to include a divider line before this field

Divider text

Text to include in the divider

You can create Checkbox custom fields in OpenAir. With a checkbox custom field, employees can only select a value or not select it. This type of field lends itself to a true or false value.

Using checkboxes for data elements enables for flexible reporting. Since the values are defined by being checked or unchecked, the field filters for data reporting.

Currency

For: Action item, Currency field

Field name
 ☒ Active

Required, no spaces allowed

Description

Description of this custom field

Association
Action item

Select what entity you want to add this field to

Display name

You must enter a title to display on forms

Hint

Hint text will display on forms

Field size Decimal positions

Field size includes decimal amount and decimal point character

☐ Required
 Check to make this field require data entry on your forms.

☐ Hide on data entry forms
 Check to hide this field on data entry forms

☐ Add notes
 Check to include an associated notes field

☐ Divider
 Check to include a divider line before this field

Divider text

Text to include in the divider

You can create Currency custom fields in OpenAir. Currency fields are used to store a dollar or other currency value. By using currency fields, you can store values that can be reported on later as well as used in custom calculations. For example, you might set a bonus rate on the Employee Demographic form that could later be used to calculate bonus payments using either calculated fields or by downloading the data to Microsoft Excel.

You need to establish the Field size, which is the total field length including the decimal character, and the Decimal positions, indicating the number of digits to the right of the decimal.

Date

For: Action item, Date field

Field name
 ☒ Active

Required, no spaces allowed

Description

Description of this custom field

Association
Action item
 Select what entity you want to add this field to

Display name

You must enter a title to display on forms

Hint

Hint text will display on forms

☐ Default to Current Date
 Check to always default to the current date.

☐ Required
 Check to make this field require data entry on your forms.

☐ Unique
 Check to enforce unique values in this field

☐ Hide on data entry forms
 Check to hide this field on data entry forms

☐ Add notes
 Check to include an associated notes field

☐ Divider
 Check to include a divider line before this field

Divider text

Text to include in the divider

You can create custom Date fields in OpenAir. Date fields store a date value. By using date fields, you can store values that can be later reported on. For example, you could set a start date or birthday on the Employee Demographic form that could later be reported on in Detail Reports. The date format defaults to the format selected in Regional Settings. See [Regional Settings](#).

You can set the date field to default to today's date by selecting the check box to Default to Current Date.

Dropdown

For: Action item, Dropdown field

Field name
 ☒ Active

Required, no spaces allowed

Description

Description of this custom field

Association
Action item
 Select what entity you want to add this field to

Display name

You must enter a title to display on forms

Hint

Hint text will display on forms

Values

Click text area to edit value list

☐ Required
 Check to make this field require data entry on your forms.

☐ Hide on data entry forms
 Check to hide this field on data entry forms

☐ Add notes
 Check to include an associated notes field

☐ Divider
 Check to include a divider line before this field

Divider text

Text to include in the divider

You can create custom Dropdown fields in OpenAir. Dropdown fields allow employees to select a value from a pre-defined list of values. Only one value can be selected per Dropdown field. These selected values can be reported on. For example, you may create a list of sales reps for projects to create reports for commission purposes. Custom Dropdown fields can be used in both Summary and Detailed Reports. In Summary Reports, the Dropdown fields can be subtotaled and filtered to limit data in the report. In addition to limiting value selections, this is a primary advantage of using a Dropdown field instead of a text field.

Type the Value list, including only one value per line. It is the list of data provided to employees when they are populating the field.

Note: Dropdown field values are stored as text in the database. You should not edit or remove existing values from a Dropdown field that has been in use unless you are aware it may require some database cleanup afterwards. OpenAir has an Advanced Custom field value editor feature, which supports editing Dropdown fields. Please send an email to OpenAir Support and request that it be enabled.

Dropdown and Text

For: Action item, Dropdown and Text field

Field name
RiskFactor ☒ Active

Required, no spaces allowed

Description
Risk Factor

Description of this custom field

Association
Action item

Select what entity you want to add this field to

Display name
Risk Factor

You must enter a title to display on forms

Hint
Select or type in main risk factor

Hint text will display on forms

Field size Max data length

Field size and length are measured in characters; field size is required

Value list

Time
Budget
Resources

Possible value list, one value per line

☐ Required
Check to make this field require data entry on your forms.

☐ Hide on data entry forms
Check to hide this field on data entry forms

☐ Add notes
Check to include an associated notes field

☐ Divider
Check to include a divider line before this field

Divider text

Text to include in the divider

You can create custom Dropdown with Text fields in NetSuite OpenAir. Dropdown with Text fields allow employees to select a value from a pre-defined list of values or add a text value. Only one value can be selected per Dropdown with Text field. In other words, you cannot pick from the list of values AND add text. You may do one or the other. For example, you can create a list of partners for projects and employees may select one. Employees could also enter a new partner if the value does not display in the list of values.

Type the Value list, including only one value per line. It is the list of data provided to employees when they are populating the field.

The selected values can be reported on in both Summary and Detailed Reports. In Summary Reports, Dropdown with Text fields can be subtotaled and filtered.

Note: The filter in Summary Reports only includes values from the defined Value list. Text employees enter cannot be filtered.

Hours or Days

For: Action item, Hours field

Field name
HoursDelayed ☒ Active

Required, no spaces allowed

Description
Delay in hours

Description of this custom field
Association
Action item

Select what entity you want to add this field to
Display name
Delay in hours

You must enter a title to display on forms
Hint
Number of hours the item will be delayed by

Hint text will display on forms

Field size Decimal positions
12 2

Field size includes decimal amount and decimal point character

☐ Required
Check to make this field require data entry on your forms.

☐ Hide on data entry forms
Check to hide this field on data entry forms

☐ Add notes
Check to include an associated notes field

☐ Divider
Check to include a divider line before this field

Divider text

Text to include in the divider

You can create custom Hours and Days fields in OpenAir. The form is the same. These custom fields store hour or day values for an entity that can be later reported on. For example, you could set a Days value on a task that could be the standard allotted time for that task.

Multiple Selection

For: Action item, Multiple Selection field

Field name
RequirementNeeds ☒ Active

Required, no spaces allowed

Description
Requirement Needs

Description of this custom field

Association
Action item

Select what entity you want to add this field to

Display name
Requirement Needs

You must enter a title to display on forms

Hint
Select the relevant needs from the list x

Hint text will display on forms

Value list

Software
Hardware
Professional Services

Possible value list, one value per line

☐ Required
Check to make this field require data entry on your forms.

☐ Hide on data entry forms
Check to hide this field on data entry forms

☒ Allow ordering
Check to allow ordering of items in the selector

☐ Add notes
Check to include an associated notes field

☐ Divider
Check to include a divider line before this field

Divider text

Text to include in the divider

You can create custom Multiple Selection fields in NetSuite OpenAir. Multiple Selection fields allow employees to select multiple values from a pre-defined list. Employees may choose one value, multiple values, or all values.

Selected values can be then reported on. For example, you can create a list of project influences for projects that can be reported on for bonus purposes. Multiple Selection fields can be used in both Summary and Detailed Reports. However, you cannot summarize or filter data with Multiple Selection fields. You can only report on data.

Numeric

For: Action item, Numeric field

Field name
 ☒ Active

Required, no spaces allowed

Description

Description of this custom field

Association
Action item
 Select what entity you want to add this field to

Display name

You must enter a title to display on forms

Hint
 ×

Hint text will display on forms

Field size Decimal positions

Field size includes decimal amount and decimal point character

☐ Required
 Check to make this field require data entry on your forms.

☐ Unique
 Check to enforce unique values in this field

☐ Hide on data entry forms
 Check to hide this field on data entry forms

☐ Add notes
 Check to include an associated notes field

☐ Divider
 Check to include a divider line before this field

Divider text

Text to include in the divider

You can create custom Numeric fields in OpenAir. Numeric fields are used to store a numerical value. By using Numeric fields, you can store values that can be reported on as well as used in Custom Calculations. For example, you could set a Monthly Hours Goal on the Employee Demographic form that could later be used to calculate bonus payments using either calculated fields or by downloading the data to Microsoft Excel.

Radio Group

For: Action item, Radio Group field

Field name
 ☒ Active

Required, no spaces allowed

Description

Description of this custom field

Association
Action item
 Select what entity you want to add this field to

Display name

You must enter a title to display on forms

Hint

Hint text will display on forms

Value list

Possible value list, one value per line

☐ Default to first value in list for new entities
 Check to always default to the first value in the list for new entities

☐ Hide on data entry forms
 Check to hide this field on data entry forms

☐ Add notes
 Check to include an associated notes field

☐ Divider
 Check to include a divider line before this field

Divider text

Text to include in the divider

You can create Radio Group custom fields in OpenAir. Radio Groups allow an employee to choose one selection out of two or more choices. This type of field is functionally similar to a Dropdown custom field, whereas only one value may be chosen by the employee.

The selected values can be then reported on in both Summary and Detailed Reports. For example, you can create a list of account managers for projects to be reported on for commission purposes. In Summary Reports, Radio Group custom fields can be subtotaed and be filtered to limit data in the report.

Tag

Add a tag to your entity properties forms and display it on your list views, project status summaries, reports and dashboard portlets.

The tag custom field lets you select a single tag. It uses the same mechanism as dropdown custom fields but tag custom field values are displayed as badges with specified text and color.

Risk level
Medium
Select the risk level for this project

Client	Project	Risk level
All	All	All
Altima Technology	Project Center implement...	LOW
AAA	Data Migration	EXTREME
Pegasus Inc	ERP Deployment	INSIGNIFICANT
Pegasus Inc	Pegasus	HIGH
Zibura Technologies	Hardware implementation	MEDIUM

- You can use tag custom fields to draw attention to important information on forms, list views, and reports. For example, you can use this custom field type to define a risk tags for any entity.
- You can control who can see or update tag values using form permissions and form rules.
- You can use the OpenAir Integration Manager, XML API, SOAP API and user scripting to read, set and modify tag custom fields.

To create or modify a tag custom field and tag value options:

1. Follow the usual procedure for creating or modifying custom fields.
 - If the optional feature Conditional Dropdown Custom Fields is enabled for your OpenAir account (recommended), the custom field properties form includes a required **Tags** field.

Global Settings Custom fields

Cancel Save

For: Project, Tag field

Field name*
risk_tag ☒ Active
Required, no spaces allowed

Description
This tag can be used to quantify the level of risk in a highly visual way
Description of this custom field

Display name*
Risk level
You must enter a title to display on forms

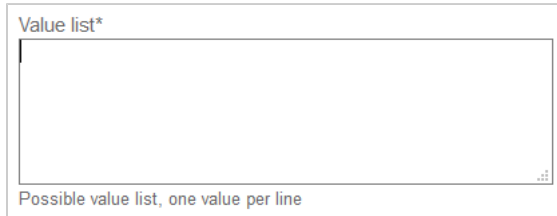
Hint

Hint text will display on forms

Tags*
There are no tags defined. To add new tags, click Modify.
[Modify](#)

☐ Required
Check to make this field require data entry on your forms.

- Otherwise, the custom fields properties form includes a required **Value list** field.




Value list*

Possible value list, one value per line

2. On the custom field properties form, define Tag values.

Note: The following steps assume the optional feature Conditional Dropdown Custom Fields is enabled for your OpenAir account (recommended). If Conditional Dropdown Custom Fields is enabled for your OpenAir account, list tag value definitions in the required order, one value per line, using the following <Text><Hex_Color_code> in the **Value list** text box— for example, Medium#F7E308.

To enable the Conditional Dropdown Custom Fields feature for your account, contact OpenAir Support.

- a. Click **Modify** under **Tags**. A popup appears and shows the custom field display name for existing fields, or “New Field Values” if you are creating a new custom field.
- b. To add a new tag value, click the Add button , and type the tag value definition in the text box. Click **OK**. The tag value is added.

Note: You can define the text and badge color for tag values. The tag value definition includes the display text and the background color for the tag value in the following format: <Text> <Hex_Color_code>

- <Text> — The display text . It must be unique for each tag value.
- <Text> <Hex_Color_code> — The background color defined as a Hex color code (e.g. #2C7ADB).

The tag value display text is set automatically to white or black, depending on the background color.

New Field Values:

Insignificant#CCCCCC

Low#83CF29

Medium#F7E308

High#FC4242

Extreme #942645

Cancel OK

+

Click and drag 'New Field Values' items to rearrange list, or click to edit item value. Cancel OK

- c. To modify a tag value, click the tag value, and edit the tag value definition in the text box. Press Enter to save your changes or Esc to discard your changes. The tag value shows the new definition.

Medium#F7E308 x

High#FC4242

Press 'Enter' to save changes, 'Esc' to discard.

- d. To delete a tag value, click the tag value, and click the Delete icon **x** . The tag value is removed.

Note: You can remove a tag value even if the tag custom field is set to this value on some records. Records continue to show the selected tag value after that tag value is removed.

- e. To change the order of tag values in the dropdown, drag tag values to the position required.

Risk level:

Insignificant#CCCCC

Low#83CE39

High#FC4242

Medium#F7E308

Extreme#942645

+

- f. Click **OK** to save the tag value changes. The custom field properties form shows the tag values you added or modified.

Tags*

INSIGNIFICANT

LOW

MEDIUM

HIGH

EXTREME

Modify

3. Follow the usual procedure for creating or modifying custom fields.
4. Click **Save** to save the custom field properties.

Text

Cancel
Save

For: Action item, Text field

Field name
 ☒ Active

Required, no spaces allowed

Description

Description of this custom field
Association
Action item
Select what entity you want to add this field to
Display name

You must enter a title to display on forms
Hint
 x

Hint text will display on forms

Field size Max data length

Field size and length are measured in characters; field size is required

☐ Required
Check to make this field require data entry on your forms.

☐ Unique
Check to enforce unique values in this field

☐ Hide on data entry forms
Check to hide this field on data entry forms

☐ Add notes
Check to include an associated notes field

☐ Divider
Check to include a divider line before this field

Divider text

Text to include in the divider

You can create custom Text fields in OpenAir. Text fields store text values up to a maximum of 250 characters. Text fields can be used for both Summary and Detail Reports. However they cannot be used to summarize or filter data, only to add reporting details. For example, you could set a SIC Code on the client that could later be used in Detail Reports.

Text Area

For: Action item, Text Area field

Field name
 ☒ Active

Required, no spaces allowed
 Description

Description of this custom field
 Association
Action item
 Select what entity you want to add this field to
 Display name

You must enter a title to display on forms
 Hint

Hint text will display on forms
 Field width Rows

Field width is measured in characters and is required
☐ Required
 Check to make this field require data entry on your forms.

☐ Hide on data entry forms
 Check to hide this field on data entry forms

☐ Add notes
 Check to include an associated notes field

☐ Divider
 Check to include a divider line before this field
 Divider text

Text to include in the divider

You can create Text Area custom fields in OpenAir. Text Area fields store lengthy text values. Text fields can be used for both Summary and Detail Reports. However, you cannot summarize or filter data. You can only add reporting details. For example, you could set a Special terms field on the client that could later be used in Detail Reports.

Sequence

For: Action item, Sequence field

Field name
 ☒ Active

Required, no spaces allowed
 Description

Description of this custom field
 Association
Action item
 Select what entity you want to add this field to
 Display name
 x

You must enter a title to display on forms
 Next sequence number

Sequence will automatically increment from this value
☐ Hide on data entry forms
 Check to hide this field on data entry forms

☐ Add notes
 Check to include an associated notes field

☐ Divider
 Check to include a divider line before this field
 Divider text

Text to include in the divider

You can create custom Sequence Group fields in OpenAir. Sequence Group fields assign a unique number to each associated entity. However, please note that custom field sequence numbers are NOT modifiable. The sequencing continues even if a record gets deleted. For example, if a Sequence custom field is associated with projects, and if there is a 100, 101, 102, and 104, chances are that project 103 was deleted. Sequence Group fields are applied by going to the associated entity, one-by-one in the desired order, and then saving the entity's form.

Sequence Group fields can be used for both Summary and Detailed Reports. However, you cannot summarize or filter data, but only add reporting details. For example, you could set a Project Number that could later be used in Detail Reports.

Ratio

For: Action item, Ratio field

Field name
 ☒ Active

Required, no spaces allowed

Description

Description of this custom field

Association
Action item
 Select what entity you want to add this field to

Display name

You must enter a title to display on forms

Hint

Hint text will display on forms

Field size

Decimal positions

Field size includes decimal amount and decimal point character

☐ Required
 Check to make this field require data entry on your forms.

☐ Hide on data entry forms
 Check to hide this field on data entry forms

☐ Add notes
 Check to include an associated notes field

☐ Divider
 Check to include a divider line before this field

Divider text

Text to include in the divider

You can create custom Ratio fields in OpenAir. Ratio fields can be modified as needed by accessing the entity form and changing the value. Ratio fields are very useful if you need a custom field included in a calculated field because they can be multiplied or divided against all other types of integer fields such as numeric, currency, and hours, to name a few.

URL

The screenshot shows the 'Custom Fields' configuration window for a 'URL' field. At the top, there are 'Cancel' and 'Save' buttons. Below, the configuration is for a 'Project, URL field'. The 'Field name' is 'SOW' and it is checked as 'Active'. The 'Description' is also 'SOW'. The 'Association' is set to 'Project'. The 'Display name' is 'SIC Code'. A 'Hint' is provided: 'Project Statement of Work'. The 'URL' field is empty. The 'Link name' is also empty. The 'Action' is set to 'Open link in new tab or window'. There are several checkboxes for field behavior: 'Required' (unchecked), 'Unique' (unchecked), 'Hide on data entry forms' (unchecked), 'Add notes' (unchecked), and 'Divider' (unchecked). A 'Divider text' field is also present but empty.

URL fields are used to define clickable hyperlinks that enrich OpenAir forms with links to both internal OpenAir documents and external resources available on a customer's intranet or the internet as required. For example, a user can create a link from a project to its Statement of Work document stored in an OpenAir workspace by specifying the Direct URL.

- **URL** — This is the default URL to use. The user can change this if they have access to edit the custom field.
- **Link name** — This is the default text to display that when clicked opens the URL specified. The user can change this if they have access to edit the custom field.
- **Action** — This determines how the URL is opened when the link name is clicked.

Form Permissions Overview

While this is not a link on the Administration > Global Settings window, it relates to your job as a System Administrator. It is helpful to understand how and where you can modify form permissions as well as set default form values.

Refer to the following:

- [Modify Form Permissions](#)
- [Set Form Default Values](#)

Modify Form Permissions

OpenAir lets you modify and control entity forms using a “Modify form permissions” link.

There are two ways to access this function:

- Go to Administration > Customization. Select a Form on the left side of the screen, and set the form permissions in the “Fields Access” tab. Only areas of OpenAir which support form permissions will have a “Fields Access” tab here.

- Go to an “Edit entity” form (for example, the Project Properties form), click the Tips button, and click the “Modify the form permissions” link. A window appears with these options:
 - General permissions
 - Field settings
 - Hidden divider sections
 - Permission rules
 - Field order
 - Text field length
 - Form options
 - Form message

Only areas of OpenAir which support form permissions will have a “Modify the form permissions” link here.

Form permissions set in the OpenAir web application also affect the OpenAir apps for iPhone and Android, as well as OpenAir OffLine.

Additionally, form permissions are respected in the Expenses worksheet; set them using either of these two procedures:

1. Contact Support and ask them to enable the “Do not allow envelope submission if there are required fields missing from it or any receipts” feature.
2. Go to any receipt form, click the Tips button, then click the “Modify form permissions” link.
3. Make your changes to the form permissions.
4. Go to the “Form options” section and select “Re-check required fields on entity submission”.
5. Click **Save**, then click the “Close this window” link.

or

1. Contact Support and ask them to enable the “Do not allow envelope submission if there are required fields missing from it or any receipts” feature.
2. Go to Administration > Customization and select the Expenses > Receipt form on the left side of the screen.
3. Click the “Form Settings” tab and select “Re-check required fields on entity submission”.
4. Click the “Fields Access” tab and set the form permissions for the Expenses > Receipt form.
5. Click **Save**.

Refer to the following descriptions.

General Permissions

General permissions		Admin	Consultant	Project m...	Resource m...	Controller	Contractor
Disable the Delete button	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disable the Save button	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

General Permissions allow access control to Delete and Save buttons according to an employee role. You may select check boxes for each role to enable the following: Disable the Delete button and Disable the Save button. These General Permission settings are universal for the form's associated entity.

Field Settings

Field settings		Admin	Consultant	Project mana...	Resource m...	Controller	Contractor
A field will not be made read-only or hidden if it is required and does not have a value. Keys: [REQ] = Required, [RO] = Read-only, [HIDE] = Hidden							
Project name	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>
Client	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>
Project manager	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="RO"/>
Project stage	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="RO"/>
Start date	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>	<input type="text" value="REQ"/>
Budget (hours)	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="HIDE"/>

Field Settings within Form Permissions allow access to and control of fields within the associated entity form. Field level settings are set based on an employee's role. These Field Settings are universal for the form's associated entity.

The field setting options include:

- REQ — Required on form. Employee must enter a value.
- RO — Read Only on form. Entry is not allowed.
- Hide — Hide from form. Field does not display on form.
- R-RO — Read Only for system required fields.
- R-Hide — Hide from form for system required fields.



Note: If fields are controlled using Field Settings or a switch-based **field is required** option, those fields are not able to be controlled by Permission Rules. Field settings and switches override Permission Rules.

Hidden Divider Sections

Hidden divider sections						
Check the box to make a section hidden for a role.						
	Admin	Consultant	Project mana...	Resource m...	Controller	Contractor
Notifications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Message board enabled/disabled according to:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Loaded hourly cost	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Expense policy	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Additional information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Filter set	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Attachments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Hidden divider sections allow sections within the entity form to be hidden based on the role of the employee. Divider sections can be standard or custom. Sections are defined as a grouping of fields. Hiding divider sections includes both the fields and the section title.

Permission Rules

Permission rules


Hide & clear tax location for USD [\[Edit\]](#)

[Create](#)

Permission rules allow administrators to conditionally control which fields they capture on many entity forms. Selection of field values can dynamically control other fields on a form. You can apply this functionality to both standard fields and custom fields. When a field is selected on a form, it can prompt an action on other fields. Actions include the following:

- Show — Displays selected fields when the rule's conditions are met.
- Hide — Hides selected fields when the rule's conditions are met.
- Read Only — Marks selected fields as Read Only so that users cannot edit them when the rule's conditions are met.
- Required — Marks the selected fields as required when the rule's conditions are met.

- **Hide and Clear** — Hides the selected fields and clears any values in them when the rule's conditions are met.
- **Limit values** — Allows you to limit which values are available to select in a field, when a larger number of values exists. Selecting this rule displays the "Use only values allowed by field and limit" option beneath the "Limit values" pick lists. Selecting this option limits the field's available values to those which are allowed by that particular field and any other limits imposed on the values, for example, through filter sets.

 **Note:** If the "Use only values allowed by field and limit" option is not selected, the values displayed in the field are all values allowed by all limit values rules. If the "Use only values allowed by field and limit" option is selected, only values which are in all limit values rules are displayed in the field. If two or more limits were created without the "Use only values allowed by field and limit" option, and then the option is selected and new limit values rules are created, the field displays only values which are in both the new rules and in limit values rules created before the option was selected. To display all values in the field allowed by all limit values rules after selecting the "Use only values allowed by field and limit" option, clear this option from all limit values rules.

- **Hide buttons** — Hides selected buttons, such as "Save" or "Cancel", when the rule's conditions are met.

For example, a custom field on a Employee Demographic form called Employee Type classifies employees as an employee or contractor. If a contractor value is chosen, then a Vendor name field becomes visible and required so contractor data can be entered.

As with form permissions, there are two ways to identify if permission rules are supported in an OpenAir area and to set permission rules:

- Click the Tips button while in an "Edit entity" form. If the form supports permission rules, the "Modify form permissions" link will be available.
- Go to Administration > Customization and select the area you want to set permission rules for on the left side of the screen. If permission rules are supported, the "Rules" tab will be available. Click the "Rules" tab to create or edit permission rules for the selected area.

Permission rules set in the OpenAir web application also affect the OpenAir apps for iPhone and Android, as well as OpenAir OffLine.

Additionally, permission rules using REQ as their action are respected in the Expenses worksheet; follow either of these two procedures to set them:

1. Contact Support and ask them to enable the "Do not allow envelope submission if there are required fields missing from it or any receipts" feature.
2. Go to any receipt form, click the Tips button, then click the "Modify form permissions" link.
3. In the "Form options" section, select "Re-check required fields on entity submission".
4. Click **Save**, then click the "Close this window" link.

or

1. Contact Support and ask them to enable the "Do not allow envelope submission if there are required fields missing from it or any receipts" feature.
2. Go to Administration > Customization and select the Expenses > Receipt form on the left side of the screen.
3. Click the "Form Settings" tab and select "Re-check required fields on entity submission".
4. Click the "Rules" tab and create or edit the permission rules for the Expenses > Receipt form.
5. Click **Save**.

Note: The Expense worksheet does not support platform scripts, even when this feature is enabled. In addition, Permission rules are not supported for timesheets.

Cancel **SAVE** **SAVE & CREATE ANOTHER**

Rule name

Define conditions:

☒ Any of the following ☐ All of the following

[Add rows]

Perform action

Show

Available

- Project name
- Client
- Project manager
- Project stage
- Start date

Selected

Add selected > Add all > < Remove selected < Remove all

☐ Custom message will be displayed

Severity of custom message

error

Custom message

To create Permission Rules:

1. Go to a new project, new task, or new timesheet form.
2. Click the link to **Modify form permissions** from the **Tips Button**.
3. Scroll to Permission rules. Click the **Create** link.
4. Enter a Rule name.
5. Define conditions of the rule. Multiple conditions may be required to create the condition.

Note: Standard fields, custom fields, and employee roles are options within the conditions.

6. Set the Perform action and the Selected fields. Multiple fields may be selected based on the condition.
7. Click Save.

Note: If fields are controlled using Field Settings or a switch-based **field is required** option, those fields are not able to be controlled by Permission Rules. Field settings and switches override Permission Rules. If a field is controlled with a Field Setting, it cannot be additionally controlled by a Permission Rule. It can, however, be included in the condition part of a rule.

Set Form Default Values

Set form default values lets you establish common values that pre-populate forms when creating the following:

- Projects
- Tasks
- Timesheets
- Receipts
- Bookings
- Milestones
- Billing rules
 - Time billing rule
- Revenue Recognition rules
 - Percent complete rule
 - As billed rule
 - Expenses rule
 - Fixed amount on date or milestone rule
 - Fixed amount on percent complete rule
 - Incurred vs. forecast rule
 - Tome project billing rule

Values can be set for specific roles, so the role of each employee would dictate which values are defaulted. If the defaults apply globally, they may be applied to all roles. Defaults can be set for a variety of fields, including custom fields.

To Set form default values:

1. Create a new form which supports form default values (see list above).
2. Click the link to **Set default form values** from the **Tips Button**.
A copy of the form appears.
3. Select a role or accept the default of All.
4. Complete all fields for which default values are desired.
5. Click Save.

Use caution in setting default form values. We do not recommend setting default values for fields that are often changed during data entry. Setting too many default values can result in data entry errors because employees may forget to change key input data.