



OpenAir

User Guide

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OpenAir Overview

Welcome to OpenAir.

This guide includes information about the OpenAir user interface and describes how to use its features.

Note: With effect from June 2022, all OpenAir accounts will be using the new generation user interface, previously introduced as the Redesigned OpenAir User Experience optional feature. The new responsive design optimizes screen real estate and adapts well to tablets and smaller screen resolutions.

See [Feature Changes in the Redesigned User Experience](#) for a summary of features released to date.

The OpenAir User Guide includes the following chapters:

- [OpenAir Overview](#) — This overview includes a brief introduction to OpenAir Modules (see [OpenAir Modules](#)). If you were using the previous UI until recently, you can refer to the list of feature changes introduced with the upgrade to the redesigned user experience and other optional features available with upgrade (see [Feature Changes in the Redesigned User Experience](#) and [Optional Features](#)).
- [Logging in to OpenAir](#) — Describes how to access OpenAir, change your password, or reset your password.
- [Navigating OpenAir](#) — Describes how to navigate OpenAir, including the Create, Tips, User Center, and other navigation options available from all pages in OpenAir.
- [Working with Lists and Records](#) — Describes how to navigate and use the functionality of:
 - Redesigned list views — See [List Views](#).
 - List views using the previous UI layout and functionality — See [List Views — Previous UI Version Layout](#).












Note: Not all list views use the redesigned list view layout and functionality. For information about list views using the redesigned list view layout and functionality, see [Feature Changes in the Redesigned User Experience](#).

- Records — See [Records](#).
- [Working with the Project Center View](#) — Describes how to work with the Project Center view. The Project Center optional feature aims to provide you with the tools to manage key project activities from a single screen.
- [Working with Dashboards and Calendars](#) — Gives a general introduction to the Home module, including dashboards and calendars..
- [Working with Reports](#) — Gives a general introduction to the Reports module, including the Report Management and Editor optional feature and user interface.
- [References](#) — Provides reference material, including descriptions for most icons used on the OpenAir user interface.

OpenAir Modules

The OpenAir system contains various applications, also referred to as modules. These applications are designed around specific functional areas, as described in the table below.

Note: The way these applications operate in your environment is dependent on the business needs of your company. You may not have access to all these applications or all the functionality within these applications. Access is controlled by role permissions and other settings managed by your account administrator.

Icon	Description
	Home Application — A home base application providing you critical information such as messages and reminders of pending approvals. It can also contain wizards, which help you quickly update data throughout the system, quick access to saved reports, which can be displayed in graphical forms such as pie charts and line graphs.
	Opportunities Application — This application enables you to manage prospective new business for your company with existing customers as well as with new customers and prospects. You are able to create Deals, Estimates, Proposals, To dos, and Events within the application.
	Projects Application — This is one of the primary components within OpenAir. This is where management of your projects takes place. The application is flexible and provides several features to address your business needs.
	Resources Application — This application enables you to schedule resources to projects. It also provides a vehicle to store the skill sets, education, industry experience, job roles and location of employees in the OpenAir database. You can then search the database to find the right resource.
	Invoices Application — This application handles financial transactions such as customer charges and invoices in OpenAir. Primarily focused on invoicing your customers, the Invoices application manages the results of running the billing rules you can set up for projects in the Projects application.
	Timesheets Application — This application is where employees record their time against customer or internal projects.
	Expenses Application — This application is where employees enter expense reports against projects for a specific date or period of time. It can also handle authorizations for employee spending on company expenses.
	Purchases Application — This application 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.
	Reports Application — This application lets you create and run a wide variety of reports based on your business configuration. OpenAir provides a robust and flexible reporting environment.
	Workspaces Application — This application provides an area where you can store documents and share them with others. It acts as an administrative library within OpenAir.
	Administration Application — This is where account administrators manage the many configuration options within OpenAir.



User Center — This is where you set up your user preferences. You can also view your profile and access OpenAir Help and Support features from the User Center.

Feature Changes in the Redesigned User Experience

The following table summarizes the feature changes introduced with the UI upgrade to the redesigned user experience, as well as the list views that benefit from the redesigned list view layout and functionality, and the records and pages that benefit from the redesigned header layout and functionality. Other features retain the design and functionality of the previous user interface.

Other optional features work particularly well with the new user interface and let you take full advantage of its capabilities — see [Optional Features](#).

Features	Redesigned List Views	Redesigned Screen and Record Headers
<ul style="list-style-type: none"> ■ Navigation: <ul style="list-style-type: none"> □ Navigation bar □ In-module screen navigation □ Create, Tips and Resource compare view buttons □ User center ■ List Views: <ul style="list-style-type: none"> □ Fixed position for Run an action / Bulk actions and Modify columns □ Column lock □ Improved pagination □ Redesigned toolbar □ To approve tab □ Bulk actions □ Sorting options □ Advanced filters □ Rows per page list options □ Column totals □ Multicurrency monetary totals □ Column filters □ Preset column filters when opening list view from QuickView or Bookings Chart □ List view smart rendering ■ Record Header: <ul style="list-style-type: none"> □ Title and subtitle □ In-record navigation □ Record information panel ■ Screen Header: 	<ul style="list-style-type: none"> ■ Projects module <ul style="list-style-type: none"> □ Alerts □ Bookings □ Issues □ Projects □ Projects > [Select a project] > Issues □ Projects > [Select a project] > Financials > Billing > Rules □ Projects > [Select a project] > Financials > Billing > Transactions □ Projects > [Select a project] > Financials > Recognition > Rules □ Projects > [Select a project] > Financials > Recognition > Transactions □ Project budgets □ Tasks ■ Resources module <ul style="list-style-type: none"> □ Alerts □ Bookings □ Resources □ Resource Demand Requests (RDR) □ Resource Request Queues (RRQ) ■ Timesheets module <ul style="list-style-type: none"> □ Alerts □ Leave accrual > All transactions □ Schedule requests □ Time entries □ Timesheets ■ Expenses module 	<ul style="list-style-type: none"> ■ Record Headers: <ul style="list-style-type: none"> □ Bookings □ Customers □ Employees □ Expense reports □ Filter sets □ Guests □ Invoices □ Projects □ Purchase orders □ Purchase requests □ Resource profile approvals □ Resources □ Resource requests □ Schedule requests □ Timesheets □ Workspaces □ Workspace Discussions □ Workspace Documents ■ Other Screen Headers: <ul style="list-style-type: none"> □ Administration > Global Settings □ Administration > Application Settings

<ul style="list-style-type: none"> □ Title and subtitle □ Tab navigation 	<ul style="list-style-type: none"> □ Alerts □ Authorizations □ Expense reports □ Expense reports > <i>[Select an expense report]</i> > Receipts □ Receipts ■ Invoices module <ul style="list-style-type: none"> □ Invoices □ Retainers □ Slips ■ Purchases module <ul style="list-style-type: none"> □ Fulfillments □ Fulfillments outstanding / Fulfilled POs □ Purchase items □ Purchase orders □ Purchase orders > <i>[Select a purchase order]</i> > Purchase items □ Purchase requests □ Purchase requests > <i>[Select a purchase request]</i> > Request items □ Request items ■ Reports module <ul style="list-style-type: none"> □ Saved Reports ■ Workspaces module <ul style="list-style-type: none"> □ Alerts □ Discussions □ Documents □ Workspaces □ Workspaces > <i>[Select a workspace]</i> > Discussions □ Workspaces > <i>[Select a workspace]</i> > Documents □ Workspaces > <i>[Select a workspace]</i> > Links 	
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	<ul style="list-style-type: none"> ■ Administration module <ul style="list-style-type: none"> □ Application settings > [Select an application] > Approval processes □ Application settings > [Select an application] > Notifications □ Application settings > Expenses > Expense items □ Application settings > Expenses > Vendors □ Application settings > Invoices > Agreements □ Application settings > Invoices > Charge stages □ Application settings > Invoices > Customer POs □ Application settings > Invoices > Invoice layouts □ Application settings > Invoices > Services □ Application settings > Projects > Assignment groups □ Application settings > Projects > Budget activities □ Application settings > Projects > Budget categories □ Application settings > Projects > Issue categories □ Application settings > Projects > Issue stages □ Application settings > Projects > Project locations □ Application settings > Projects > Project stages □ Application settings > Projects > Service [1–5] lines □ Application settings > Projects > Severities □ Application settings > Projects > Sources □ Application settings > Projects > Statuses □ Application settings > Projects > Task types □ Application settings > Purchases > Accounts payable locations □ Application settings > Purchases > Carriers □ Application settings > Purchases > F.O.B. locations □ Application settings > Purchases > Manufacturers 	
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	<ul style="list-style-type: none"> □ Application settings > Purchases > Products □ Application settings > Purchases > Purchasers □ Application settings > Purchases > Receiving locations □ Application settings > Purchases > Shipping terms □ Application settings > Resources > Attribute sets □ Application settings > Resources > Booking types □ Application settings > Resources > Generics □ Application settings > Purchases > Vendors □ Application settings > Resources > Skill/Education/Location/Job role/ Industry/Custom profile NN □ Application settings > Timesheets > Leave accrual rules □ Application settings > Timesheets > Payroll types □ Application settings > Timesheets > Services □ Application settings > Timesheets > Time types □ Application settings > Workspaces > Document categories □ Global settings > Custom Fields □ Global settings > Customers > Contacts □ Global settings > Customers > Customer locations □ Global settings > Customers > Customers □ Global settings > Display > Email templates □ Global settings > Jobs, rates > Cost centers □ Global settings > Jobs, rates > Job codes □ Global settings > Jobs, rates > Rate cards □ Global settings > Organization > Accounting Periods □ Global settings > Organization > Current Periods □ Global settings > Organization > Departments □ Global settings > Organization > Hierarchies 	
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	<ul style="list-style-type: none"> □ Global settings > Organization > Projects □ Global settings > Organization > Saved List Views □ Global settings > Organization > Work schedules □ Global settings > Reports > Custom calculations □ Global settings > Reports > Custom time ranges □ Global settings > Reports > Enabled Features □ Global settings > Users > Employee locations □ Global settings > Users > Employees □ Global settings > Users > Filter sets □ Global settings > Users > Filter sets > [Select a filter set] > Access Control □ Global settings > Users > Guests □ Global settings > Users > Guest roles □ Global settings > Users > Roles 	
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Optional Features

The following optional features work particularly well with the redesigned OpenAir user experience and let you take full advantages of its capabilities. Contact your account administrators to check whether these features are enabled in your OpenAir configuration.

- **Inline-editing in list views** — This feature lets you edit items data directly from the list view, without having to open the item form. This is currently available only in the project tasks list view and in the project center (if the Project Center feature is enabled). See [Inline-Editing in List Views](#).
- **Project Center** (Requires the Inline-Editing in List Views feature) — This feature lets you create and modify your project plan, create new phases and tasks directly from the new list view and drag-and-drop tasks and phases to reorder them, and create and manage resource bookings to your project and tasks from within the same outline view. See [Working with the Project Center View](#).
- **Redesigned Administration module** (enabled by default) — This feature lets account administrators and users with the relevant access rights use the main navigation to go to administration global settings sections and use tabs in the global settings screen header to navigate between screens. See [Administration Settings Screen Navigation](#).
- **Redesigned Advanced Filters** — This feature changes the user interface for advanced filters on redesigned list views. The redesigned advanced filters panel is compact and lists filter conditions horizontally instead of vertically. It lets you select and apply saved filters directly from the list view toolbar instead of the flyout panel. The new design brings better usability and takes less of your canvas space. See [Redesigned Advanced Filters \(Optional Feature\)](#).
- **Consolidated user profile** — This feature lets you review information about you and other resources at a glance, including skills and experience. You can access your resource profile from the user center when this feature is enabled.
- **Customized user avatars** — This feature lets you or your account administrator upload a profile picture. In the new UI, this picture displays in the User Center, when this feature is enabled.
- **Save list view configuration** — This feature lets you save list view configurations for future use. You can use the enhanced list view controls and options the new UI offers to create custom configurations

to suit your every need and switch between these configurations at any time. See [Saving and Using Custom List View Configurations](#).

The following usability enhancements are also available as optional features for the redesigned OpenAir redesigned experience list views:

- **Wrap text in list view cells** — This feature wraps long text over multiple lines in list view cells instead of showing truncated text on a single line. See [Display Options for Long Text Cells in List Views](#).

Logging in to OpenAir

To access OpenAir, go to the OpenAir login page and enter your login details. Use the following web address: <https://auth.openair.com/login>.

Note: To access an OpenAir demo account or sandbox account, use <https://auth.demo.openair.com/login> or <https://auth.sandbox.openair.com/login> respectively.

The page includes two tabs: use the **Password** tab if you log in using your OpenAir login details, or use the **Single Sign-on** tab if you log in to OpenAir by entering your username and password on your company Single Sign-on page. The method you use to log in to OpenAir depends on your account configuration. For more information, see the following topics:

- [Logging in to OpenAir with your OpenAir login details](#)
- [Logging in to OpenAir using Single Sign-On \(SSO\)](#)

Note: Depending on the Single Sign-On solution used in your company, you may need to enter your SSO details on your company SSO page first, then select the application you want to access. In this case, refer to your internal documentation for instructions.

Clicking the **Password** or **Single Sign-On** changes the URL in your browser address bar without reloading the page.

The right panel includes announcements. OpenAir include important service announcements on the OpenAir login page from time to time. Review this panel regularly for information about planned service disruptions (during new release upgrades, for example) and other information.

To check the availability of OpenAir at any time, click **View the OpenAir system status**.

To go to the OpenAir product information website (<https://www.openair.com/>), click **Go to the visitor home page** or the OpenAir logo.

If you are logging in to OpenAir using your OpenAir login details, you may need to change your password the first time you log in to OpenAir. See [Changing your OpenAir Password](#).

Passwords are valid for a limited period. The validity period depends on your account configuration. You will need to change your password periodically, before or when it expires. See [Password Expiration](#).

Depending on your account configuration you may also need to set up security questions. If this feature is enabled for your account, you can answer your security questions to reset your password and regain access, in case you are locked out of OpenAir. See [Setting Up Security Questions](#) and [Resetting your OpenAir Password](#).

The OpenAir Mobile app on Android or iOS devices uses a version of this login page adapted for smaller displays. This light version does not include the announcement panel.

Note: Your browser remembers which version of the login page you last used to sign in to OpenAir. You can change the login page version by changing or appending the following query parameter at the end of the URL in the address bar of your browser:

- <https://auth.openair.com/login?ui=light> – light version adapted for smaller displays.
- <https://auth.openair.com/login?ui=default> – full version.

The redesigned login page includes all previous login page functionality except release highlights. You can view new release highlights and other product updates in the OpenAir UI after you log in if the Product Updates Panel feature is enabled for your OpenAir account and if your role privileges enable you to view the OpenAir Help Center. See also [Product Updates Button](#).

Logging in to OpenAir with your OpenAir login details

You need the following information to log in to OpenAir:

- Your **Company ID** — This is the unique identifier for your company's OpenAir account.
- Your **User ID** — This is your unique identifier as a user of your company's OpenAir account.
- Your **Password** — This is the combination of characters that you have created.

The combination of your **Company ID**, **User ID** and **Password** may be referred to as your OpenAir login details or user credentials in the OpenAir documentation.

To log in to OpenAir using your login details:

1. Go to the OpenAir login page — <https://auth.openair.com/login>.
2. Enter your **Company ID**.
3. Enter your **User ID**.
4. Enter your **Password**.
5. Click **Log in**.

The OpenAir user interface appears.

In case you forget your login details, you can get a reminder of your user ID and the hint you set up for your password.

To get a reminder of your login details:

1. Click the link **Forgot your password or ID?**
2. Enter your **email address** associated with your OpenAir user account.
An email is sent to your email address with a reminder of your user ID and the hint you set up for your password.


In case you are unable to log in to OpenAir, you can answer your security questions to reset your password, or contact your account administrator. See [Resetting your OpenAir Password](#).

Logging in to OpenAir using Single Sign-On (SSO)

Depending on your account configuration, you can log in to OpenAir using Single Sign-on (SSO).

To log in to OpenAir using SSO:

1. Go to the OpenAir login page.
2. Click the **Single Sign-On** tab.

 **Note:** Clicking the **Password** or **Single Sign-On** changes the URL in your browser address bar without reloading the page.

- <https://auth.openair.com/login> for the Password tab.
- https://auth.openair.com/login_sso for the Single Sign-On tab.

If you use Single Sign-On when you log in:

- The Single Sign-On tab is active the next time you go to <https://auth.openair.com/login> and the URL in your browser address bar changes to https://auth.openair.com/login_sso, unless you clear your browser cache history.
- If your OpenAir session times out, you are redirected to the login page with the Single Sign-On tab active (https://auth.openair.com/login_sso)

3. Enter your **Company ID**.
4. Click **Log in**.
Your company Single Sign-on page appears.
5. Enter your Single Sign-on details. If your identity is verified successfully using SSO, you will be redirected to OpenAir.

Changing your OpenAir Password

You may need to change your OpenAir password the first time you log in to OpenAir or when your password expires. You can also change your password at any time.

To change your password in OpenAir:

1. Enter your Single Sign-on details. If your identity is verified successfully using SSO, you will be redirected to OpenAir.
2. In OpenAir, go to the User Center and click Password.
3. Enter your **Current Password**.
4. Enter your new password in the **Change Password** field.
5. Enter your new password again in the **Confirm New Password** field.
6. Click **Save**.

A message appears confirming that your password was changed

It is important to choose a password that cannot be compromised. Your password must meet minimum requirements. The following minimum requirements apply to all OpenAir accounts by default. However, a stricter password policy may be enforced for your account.

- The password must be at least characters 8 in length.
- The password must not be the same as your User ID.
- The password must contain at least one alpha and one numeric character.
- The password must contain at least three of these four character types: uppercase, lowercase, numeric, special characters (" !"#\$\$%&'()*+,-./:;<=>?@[\\]^_`{|}~").
- Your new password must not be the same as one of your last two previous passwords.



Tip: Create a password that is easy to remember and hard to guess.

Password Expiration

Passwords are valid for a limited period. Your password validity period depends on your account configuration.

After your password expires, the password form appears automatically if you try to log in to OpenAir. You must change your password before you can access OpenAir. You can change your password at any time before it expires — see [Changing your OpenAir Password](#).

You will receive a password expiration notification email 14 days before the password expires, and 3 days before the password expires, unless you change your password before. The notification email includes the date your password will expire and instructions for changing your OpenAir password.

Setting Up Security Questions

Depending on your account configuration, you may need to set up security questions when you log in to OpenAir for the first time. You may also be prompted to set up security questions when you change your password, if the Security Questions feature was enabled for your OpenAir account recently. Security questions are used to verify your identity if you are unable to access OpenAir. After you set up security questions in OpenAir, you can reset your password and regain access to OpenAir by answering a security challenge.

You can select your three security questions from the dropdown list and write your answers in the text field next to each question.

To set up your security questions:

1. Log in to OpenAir. If you have not already set up security questions and the feature is enabled for your OpenAir account, the Password form appears.
2. Scroll down to the Security Questions section.
3. For each question, select a question and enter your answers in the text field.
4. Click **Save**.

You can change your security questions and answers at any time.

To change your security questions:

1. In OpenAir, go to the User Center and click Password.
The Password page appears.
2. Scroll down to the Security Questions section.
For each question, select a question and enter your answers in the text field.
3. Click **Save**.



Note: When setting up or changing your security questions, consider the following rules:

- You must answer all three questions.
- Your answers should be unique for each question.

Security Questions

Security question 1 * City where your father was born ▼	Security answer 1 * *****
Security question 2 * City where your mother was born ▼	Security answer 2 * *****
Security question 3 * Name of your first pet ▼	Security answer 3 * *****

Cancel Save

Resetting your OpenAir Password

Depending on your account configuration, you can reset your OpenAir password yourself in case you forget your password or lock your OpenAir user account. You will need to answer the security questions you set up in OpenAir to verify your identity and regain access to OpenAir, if this feature is enabled for your OpenAir account.




To reset your password and unlock your access to OpenAir :

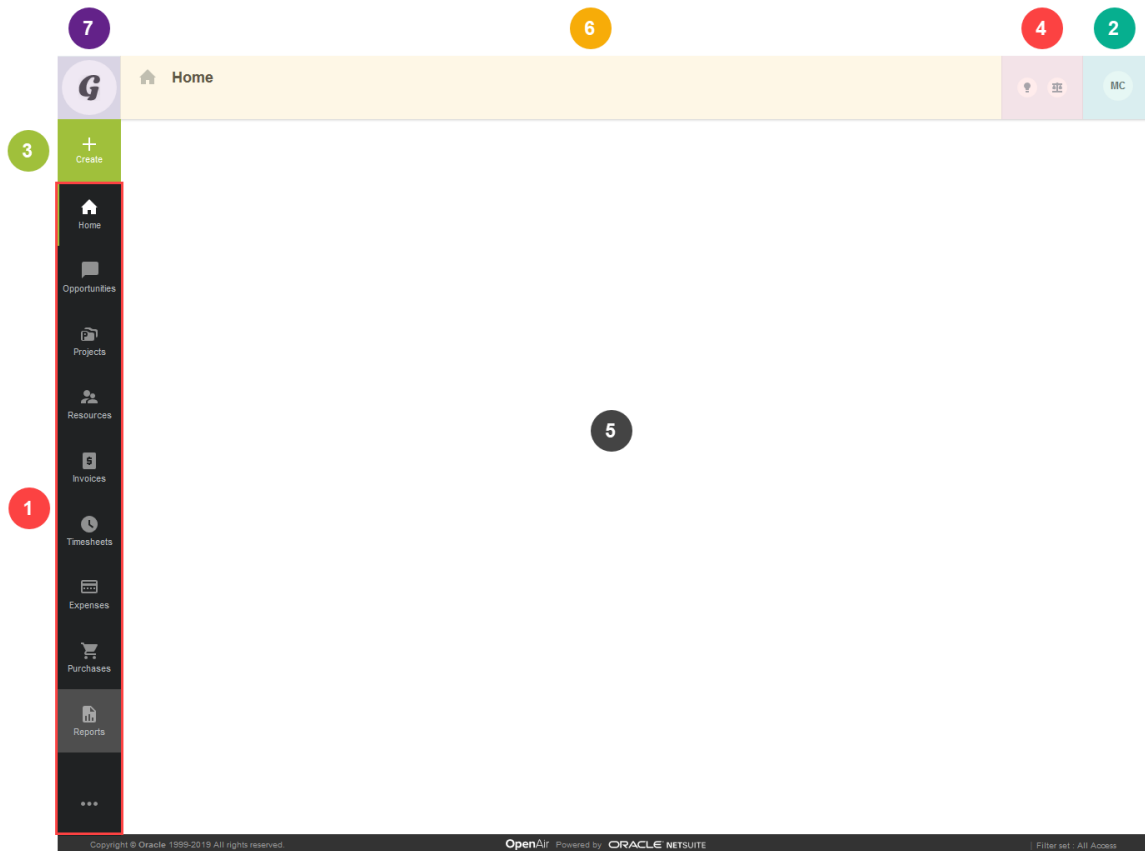
1. On the OpenAir login page, click **Reset your password or unlock your user account**.
2. Enter your **Company ID**, **User ID** and **E-mail address**.
3. Click **Submit**.
If the details entered are valid, the security challenge form appears.
4. Answer all three questions and click **Submit**. If you answer the questions correctly, you will receive an email with a temporary password.
5. Log in to OpenAir using the temporary password.
The password form appears. You will regain access to OpenAir after you change your password. See [Changing your OpenAir Password](#).

Navigating OpenAir

This section introduces you to common UI elements and tools in the redesigned OpenAir user experience.

The following features are always available regardless of the screen you are working in. Some of these features are context-sensitive and adapt according to the application you are using or the screen you are viewing.

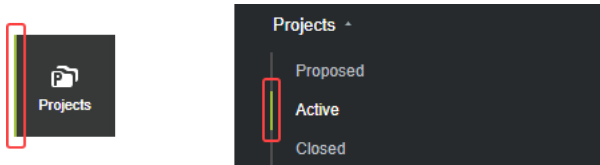
1	Main navigation menu — The navigation bar on the left lists the applications you have access to. Click one of the application icons to display a flyout in-module navigation menu listing the various views and tools available within that application. See Using the Main Navigation Menu .
2	User Center — Click on your initials or profile picture to display a flyout menu and access all user preference and support features. See User Center .
3	Create button — Click the Create button to add a new record. See Create Button .
4	Utility buttons — See Utility Buttons . <ul style="list-style-type: none"> Click the Tips button  to display quick links and tips. See Tips Button. Click the Resource Comparison button  if your role gives you access to this feature. See Resource Comparison Button Click the Product Updates button  to view a panel with new release highlights and other product updates. See Product Updates Button.
5	Canvas — Your business data displays in the canvas area. See Canvas and Screen Header .
6	Screen header — The screen-specific header indicates the screen or the record you are currently viewing. For some screens, the screen header also includes a screen-specific navigation menu and an information panel. See Canvas and Screen Header .
7	Company pictogram — Your company pictogram displays in the top left corner. The optimal pictogram size is 50 x 50 pixels. Larger logos are scaled down to fit within this dedicated space.



- Note:** If you were using OpenAir with the previous user interface , the redesigned user experience brings the following changes:
- The main navigation menu on the top bar in the previous UI is now vertical and located on the left of your browser window.
 - The administration global settings overview screen listing all global settings screens is now replaced with overview screens for each global settings sections (Organization, Display, Users, Account, Jobs, Rates, Reports, Customers, Custom Fields).
 - The utility buttons (Tips and Resource Comparison buttons) have moved from the left (under the Create button) to the top bar next to the User Center.
 - Collapsing/expanding the horizontal top bar or the vertical main navigation bar is not an option in the current version of the new UI.
 - With the new UI you have direct access to the required screen or tab and two steps closer from loading the relevant data:
 - You no longer need to load the default or the last visited screen for the selected application.
 - You no longer need to expand the dropdown list in the in-module navigation menu to access the required tab.

Using the Main Navigation Menu

The main navigation menu on the left of your browser window lists all the applications or modules you have access to. OpenAir's main modules appear as icons with a black background, while special modules such as Reports, Workspaces, and Administration are shown with a dark gray background. The application currently being used is highlighted with a green line on the left of the application icon.

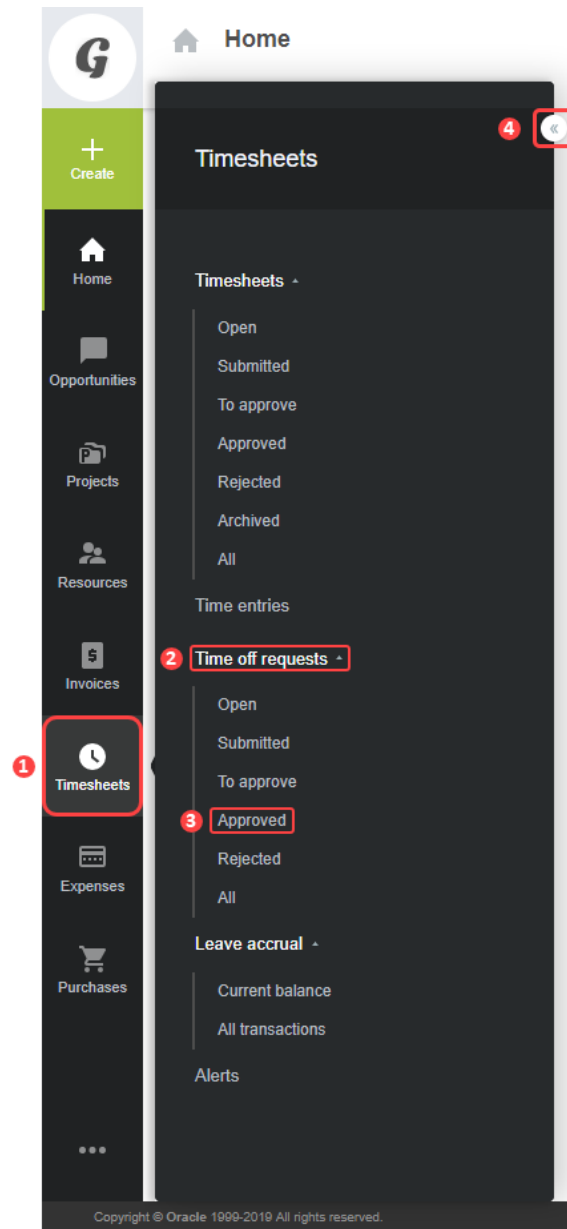


- 1 Click one of the module icons to display a navigation sub-menu for that module. The **in-module screen navigation menu** includes the views and tools you have access to in the module grouped by functionality. If the sub-menu includes the screen you are currently viewing, that screen title is highlighted with a green line on the left.
- 2 If different views and tools are available for a particular functionality, that functionality is listed in bold type with a small caret ^ next to the functionality header. Click the header to expand/collapse the list of available views and tools. Notice the caret points up if the list of views and tools is expanded, an down if it is collapsed.
- 3 Click any of the available options listed in a normal-weight font to navigate to that screen. For example to view a list of approved time off requests, click the **Timesheets** icon then click **Approved** under **Time off requests** in the Timesheets in-module screen navigation menu.



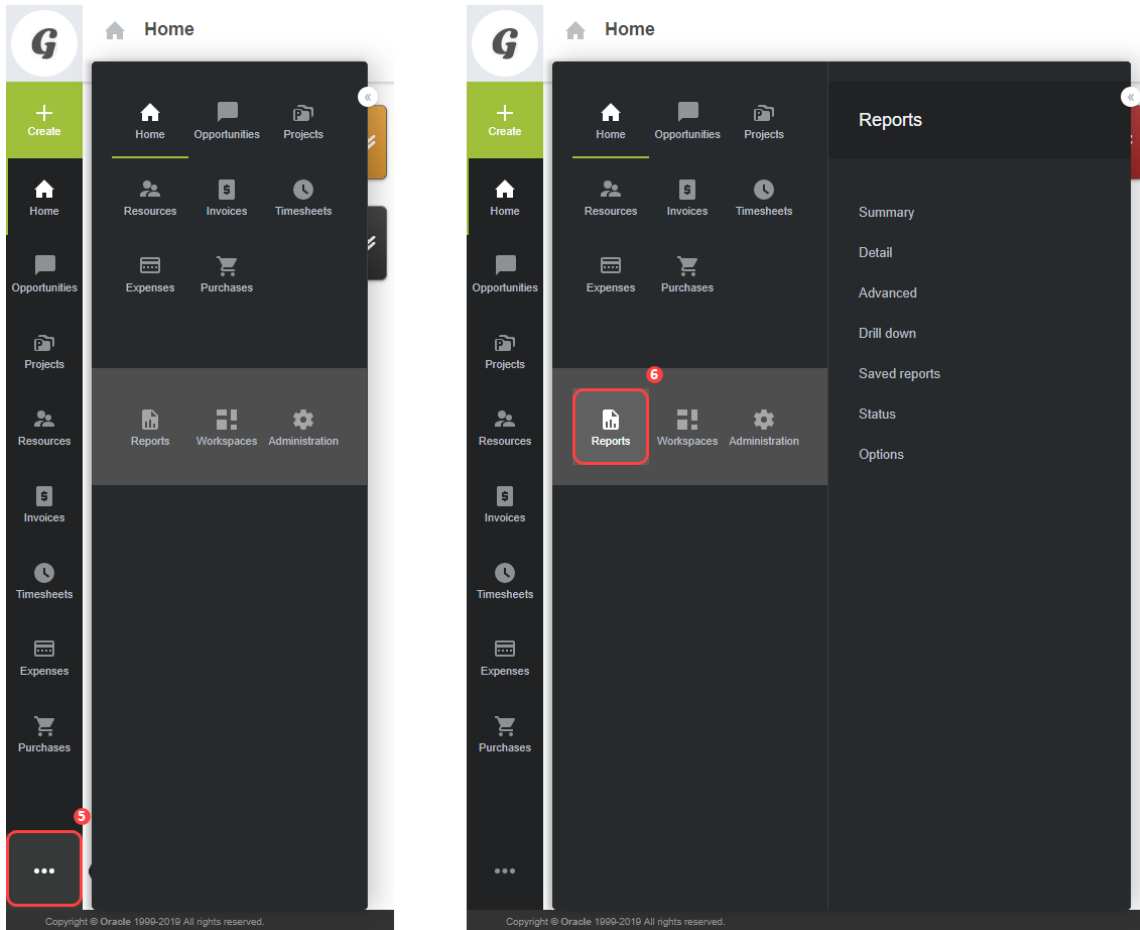
Tip: Hold the Shift key on your keyboard and click one of the options in the in-module screen navigation menu to open that view/tool in a new browser window. Hold the Ctrl key and click the required option to open the view/tool in a new browser tab.

- 4 Click the collapse icon « or click anywhere outside the in-module screen navigation menu to close it.

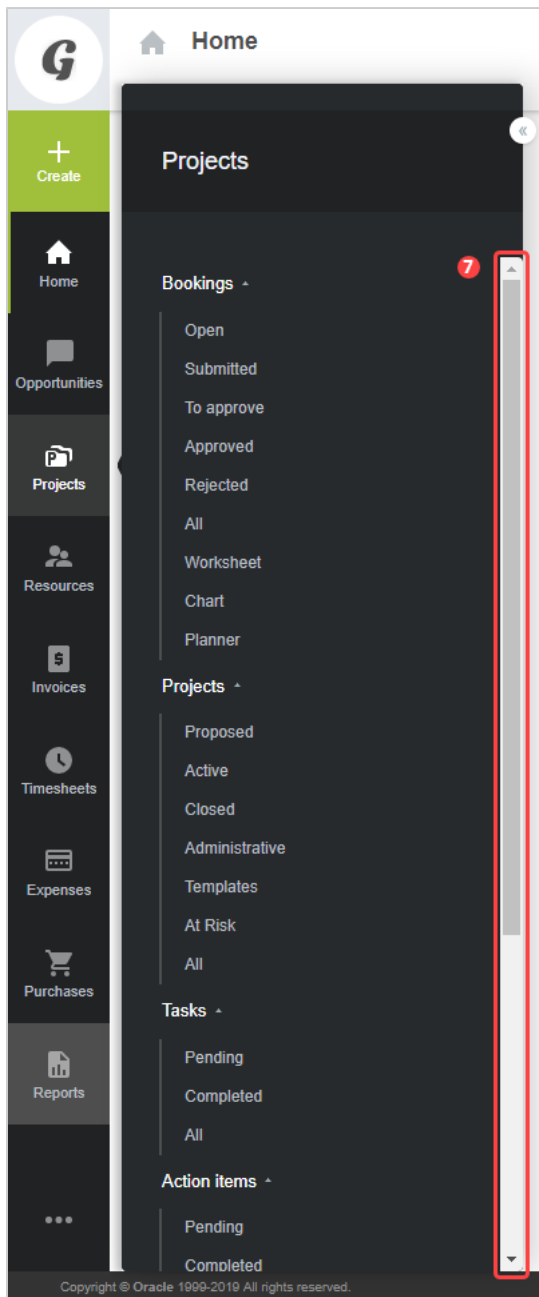


Depending on your screen size and resolution:

- 5 There may not be sufficient space to display all the available applications in the main navigation menu. Click on the More icon ... at the bottom of the main navigation menu to display a flyout navigation menu listing all the modules you have access to. Notice the green line under the application you are currently using.
- 6 Click one of the module icons to display a navigation menu for that module. The in-module screen navigation menu lists the functionality screens you have direct access to in the module.



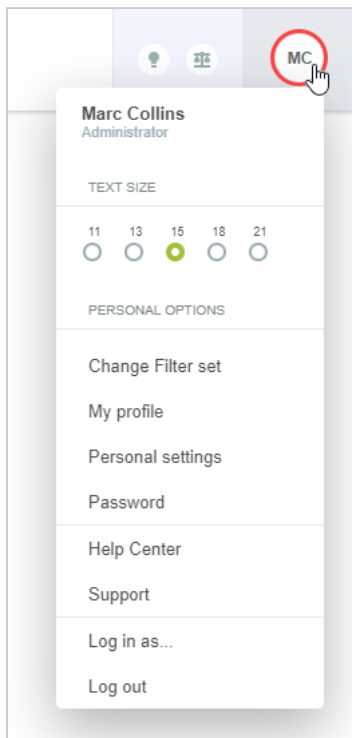
- 7** There may not be sufficient space to display all the available screen and tab options for a module (e.g. Projects). Use the scroll bar to scroll up and down the in-module screen navigation menu.



User Center

A material avatar with your initials or your profile picture displays on the top right corner.

Click the avatar to view the User Center menu. The flyout menu shows your name and role at the top.



Depending on your user and role privileges, you can access the following user settings, preferences and filters from the User Center menu.

- **Text size** — Select the text size used in the screens.
- **Change Filter set** — If you have multiple filters sets available, you will have the option to change your current filter set. Click **Change Filter set** to display the list of available filter sets and select the filter set you want to use. If your primary filter set gives you access to large amounts of information, you can change the filter set to limit the amount of records on lists to speed up loading times and improve the performance of list views.

Note: This option is only available if you have more than one filter set assigned to your user account.

- **My profile** — Click **My profile** to display your resource profile.

Note: This option is only available if the Consolidated Resource Profile optional feature is enabled for your OpenAir account and if your role privileges enable you to view your resource profile. You also need appropriate role privileges to be able to edit your resource profile or change your profile picture.

- **Personal settings** — Click **Personal settings** to display and configure your personal settings and optional features. See [Personal Settings](#)
- **Password** — Click **Password** to display a form where you can change your password, set a password hint and, depending on your account configuration, your security questions. See [Changing your OpenAir Password](#) and [Setting Up Security Questions](#).
- **Help Center** — Click **Help Center** to open the OpenAir Help Center in a new browser tab.

Note: This option is only available if your role privileges enable you to view the OpenAir Help Center.

- **Support** — Click **Support** to display the support page from where you can access SuiteAnswers and the User Forum or view release notes and user guides.

Note: This option is only available if your user privileges enable you to view the Support page.

- **Mobile apps** — Click **Download Android app** or **Download iOS app** to open the OpenAir Mobile app page in the [Google Play Store \(Android devices\)](#) or the [App Store \(iOS devices\)](#).

Note: These options are only available if your user privileges enable you to use the OpenAir Mobile app and can be disabled for all users across your OpenAir account.

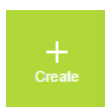
- **Proxies** — Click **Proxies** to enable other users to proxy in for you and perform tasks on your behalf.
- **Log in as ...** — Click **Log in as ...** to display the list of users you can proxy in as, then click one user to open a new instance in a new browser tab and perform tasks on behalf of a colleague.

Note: This option is only available if you are configured as an authorized proxy for at least one other user.

- **Log out** — Click **Log out** to sign out of OpenAir and end your OpenAir session.

Create Button

The **Create** button is located on the top left just under your company logo and just above the main navigation menu.



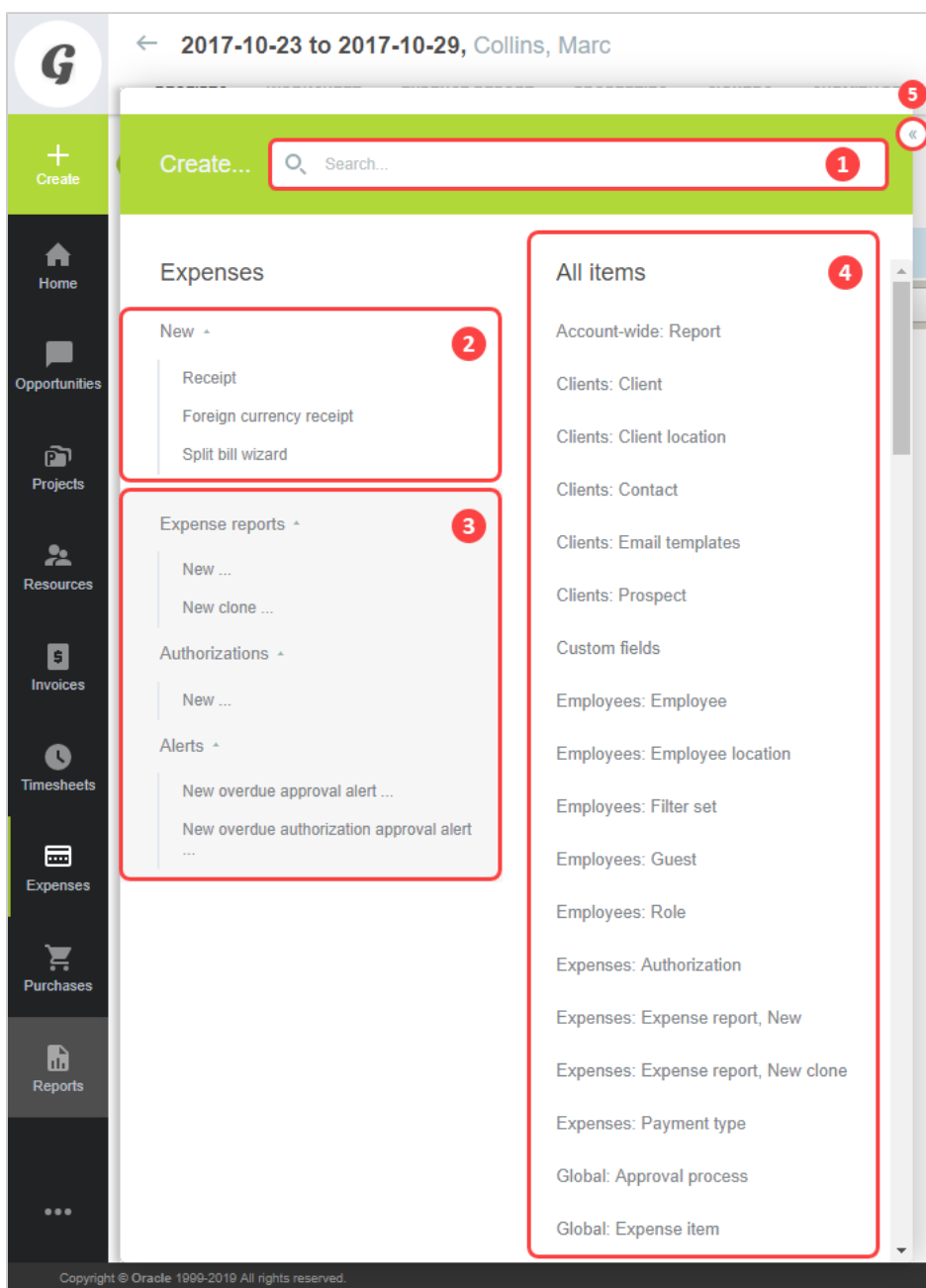
Click the **Create** button to display a context-specific Create New menu listing the create actions available within the context of the screen you are currently viewing, the module you are using and throughout the application.

Note: The Create New menu only lists those items you are able to create according to your role and access privileges

Click the item you want to create to display the new item form and create a new record.

1	Type the first characters of the item you want to create in the search box . The Create New menu items list is filtered as you type and only includes the items containing the string you have typed. Matching strings are highlighted in bold in the filtered create action list.
2	Screen specific create actions are listed on a white background. These are all the create actions available for the current screen.
3	Module specific create actions are listed on a gray background if screen- or record-specific create actions are also available. These are all the create actions available for the current module.

4	The global create list includes all the create actions available in OpenAir.
5	Click on the collapse icon « or click anywhere outside the Create New menu to close it.




Utility Buttons

Utility buttons are located on the top right corner, immediately to the left of the User Center. The buttons displayed depend on your role and other access privileges. They can include:

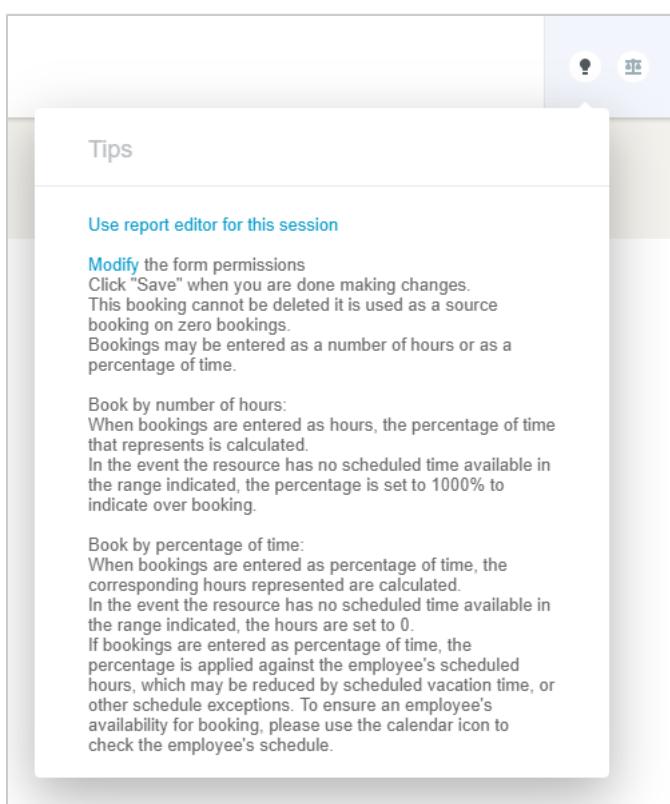
- [Tips Button](#)

- [Resource Comparison Button](#)
- [Product Updates Button](#)

Tips Button



Click the Tips button  to display contextual tips and information related to the screen you are currently viewing or module you are in. It also contains quick access links to context-specific special actions available to your role.

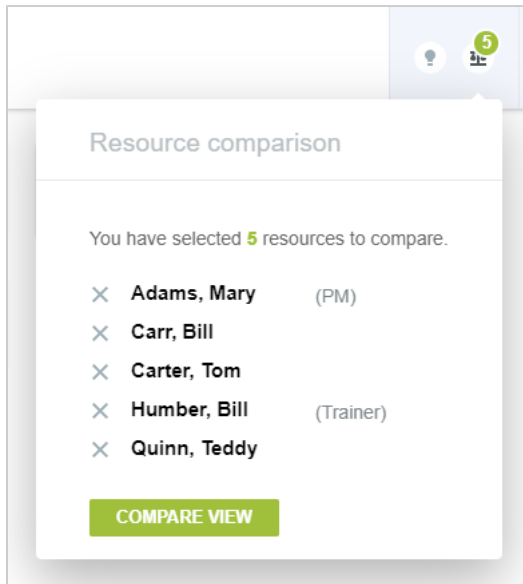
Note: The redesigned OpenAir user experience adds new levels of contextual tips to bring contextual tips closer to their context. For example, contextual tips are available at the column and the cell level on redesigned list views. See [List View Contextual Tips](#).



Resource Comparison Button


Note: This button is only available if you have access to the Resources module and the appropriate role privileges to use the Resource Comparison feature.

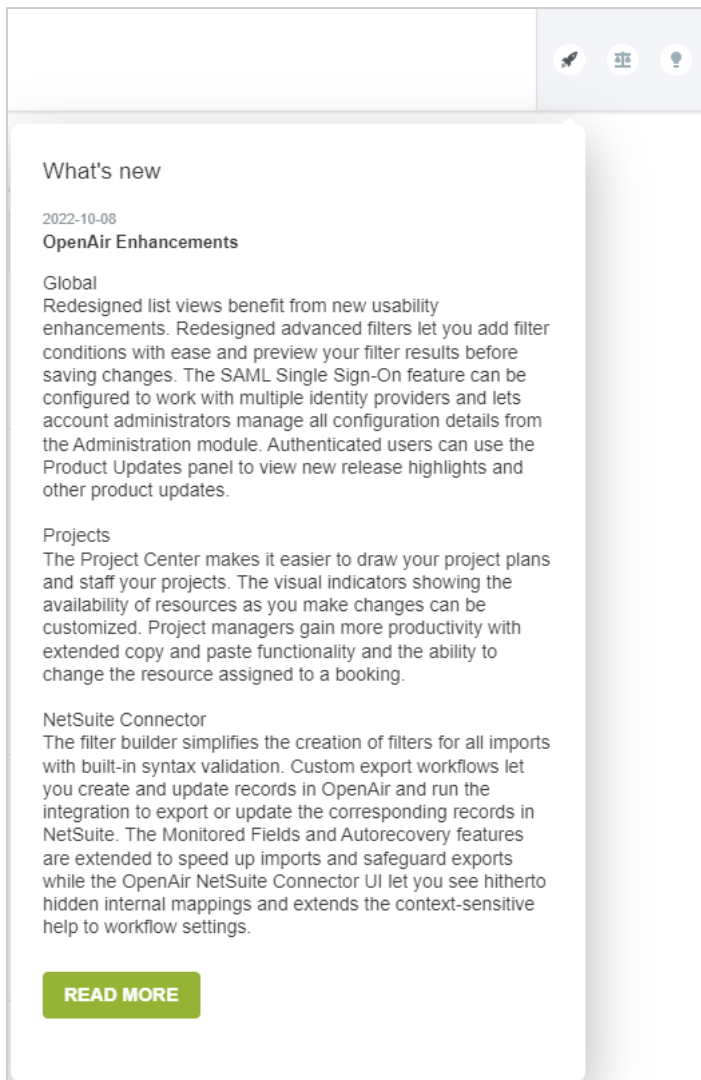
Click the Resource Comparison button  to display a list of resources currently selected for comparison. Click the remove icon  to remove a resource from the list. Click **Compare View** to open the Resource Compare View.



Product Updates Button

Note: This button is only available if the Product Updates Panel feature is enabled for your OpenAir account and if your role privileges enable you to view the OpenAir Help Center.

Click the Product Updates button  a panel with new release highlights and other product updates. The Product Updates utility button is highlighted after each release to indicate that there are new product updates available. Click **Read More** to view the full release notes in the OpenAir Help Center.



Canvas and Screen Header

The canvas displays business data organized into various visual forms for easy and convenient use. Depending on the context and purpose, information is organized into Forms, Lists, Charts or Grids/Worksheets for a “Big Picture” perspective and convenient access to data.

The screen header identifies the screen or data you are currently viewing. For some data items, such as Projects, Timesheets or Expense Envelopes, the screen header also features an in-record navigation menu to give deeper and more precise control over the data configuration.

The content of the canvas and screen header and the content format vary depending on the screen type. For more information, see the following topics:

- **List Views** — List Views present bulk data in a linear way, providing a variety of helpful tools for productive work.
- **Records** — Record screens may include data presented in different ways. In some cases, you may be able to access Forms, Grids, List views as well as other views and tools within a record. An in-record navigation located in the screen header for these records, or record header, enables you to navigate the record data.

- **Administration Settings Screen Navigation** — Administrators control global and application settings in the Administration module. The administration global settings screen header lets you navigate between different settings forms and list views.

Administration Settings Screen Navigation

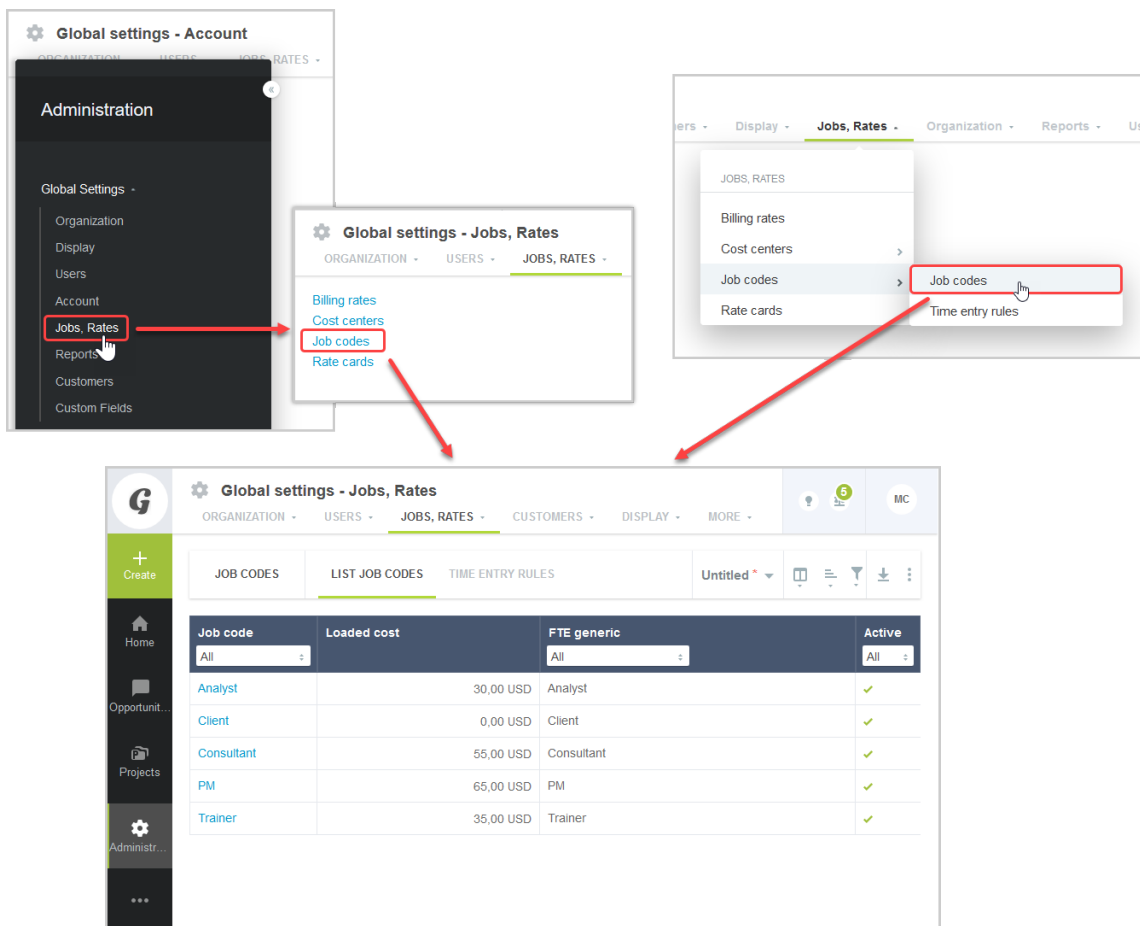
Administration global and application settings have a screen header with tab navigation and overview screens for each settings section or each OpenAir module.

To navigate to any administration settings screen from any other screen in OpenAir:

1. Click Administration in the Main Navigation menu. The in-module screen navigation submenu appears.
2. Click the relevant section under Global Settings. The section overview screen appears.
3. Click the screen required.

To navigate between global settings screens or application settings screens:

1. Click the relevant section heading in the screen header.
A submenu appears. The submenu includes a second level if screens include subtabs.
2. Click the screen or subtab required.



Working with Lists and Records

All the information you work with in OpenAir is organized and stored in records. These records are accessible from list views that include all records of a specified type. You can customize these list view to display selected fields.

List Views

You can use list views to access individual records or to work with multiple records at one time.

To access list views, click a module icon in the main navigation menu and select a relevant view from the in-module screen navigation flyout menu. See [Navigating OpenAir](#).

Some list views are also accessible as part of a specific record. See [Records](#).

List views available within a record, or in-record list views, offer the same features as list views available from the in-module screen navigation menu.

This section describes the common features for redesigned list views in the redesigned OpenAir user experience. Some of these features let you customize the list view to your requirements. Any changes you make before navigating away from a list view, logging out of OpenAir or closing the browser, will be remembered the next time you go to that list view. You may also save different configurations for your list views and switch between any saved configurations rapidly. See [Saving and Using Custom List View Configurations](#)



Note: Not all list views use the redesigned list view layout and functionality.

For a list of list views using the redesigned layout and functionality, see [Feature Changes in the Redesigned User Experience](#).

For information about list views using the previous UI layout and functionality, see [List Views — Previous UI Version Layout](#).

1	Screen header — The screen header indicates the screen or the record you are currently viewing. If the list view is part of a record, the screen header also includes an in-record navigation menu. See Record Header .
2	List view toolbar — The toolbar lets you switch between different tabs and gives you access to options and tools. See List View Toolbar and Navigating the List View .
3	Column headers — You can access additional tools and controls in the column headers. See List View Column Headers .
4	List view data — From the list data, you can use optional features to access more information or edit data directly from the list view. See List View Data .
5	Column totals — The totals for the current page are displayed in bold at the bottom of the numeric columns and the totals for the whole data across all list view pages are displayed underneath the page totals. The total number of rows in the page and in across all list view pages are displayed at the bottom of the first non-numeric column. You can enable or disable column totals using a toggle on the more options panel. See Other List Options .
6	Page navigation — Use the page navigation bar to go to the item you need quickly. See Navigating the List View .

The screenshot shows the 'Projects - Active' list view in OpenAir. The interface includes a sidebar with navigation icons, a top toolbar with filters and actions, and a main table of project data. The table has columns for % Complete, Client, Project, Project stage, Project owner, Start Date, Finish Date, Hours (Worked, Billed, Estimated), and Budget (money). The table is filtered to show 10 rows on page 2 of 3. The toolbar includes a 'BULK ACTIONS' button, a 'Project Default' dropdown, and a 'Download' icon. The footer shows 'OpenAir Powered by ORACLE NETSUITE'.

% Complete	Client	Project	Project stage	Project owner	Start Date	Finish Date	Hours Worked	Hours Billed	Hours Estimated	Budget (money)
0%	Webb Inc.	BI tool installations	Active	Collins, Marc	2016-06-20	2016-08-25	0,00	0,00	656,00	5 000,00 USD
0%	Altima Technology	Account audit	Active	Porter, Marie	2016-05-09	2016-07-04	0,00	0,00	480,00	125 000,00 USD
0%	Cooper Software	WASP	Active	Carr, Bill	2016-03-23	2016-03-23	0,00	0,00	0,00	100 000,00 USD
50%	Zibura Technologies	Hardware implementation	Active	Porter, Marie	2015-12-28	2017-11-17	3 608,00	0,00	6 984,00	250 000,00 USD
0%	Tinnerman Group	Software implementation	Active	Horton, Dave	2015-12-14	2016-07-07	8,00	0,00	1 980,00	600 000,00 AUD
49%	Damus Inc.	Payroll integration	Active	Horton, Dave	2015-02-02	2016-06-03	2 156,50	0,00	4 367,00	1 000 000,00 USD
96%	Webb Inc.	PSA module deployment	Active	Collins, Marc	2014-11-17	2015-10-28	3 300,00	0,00	3 432,00	0,00 USD
56%	Fernhill Solutions	Financial integration	Active	Ellis, Ed	2014-06-01	2016-06-03	4 364,00	0,00	7 708,00	1 500 000,00 CAD
85%	Motiva Inc.	CRM implementation	Active	Kelly, Joan	2014-06-01	2015-12-07	4 581,25	0,00	5 322,80	1 500 000,00 USD
63%	United Software	Add-on services	Active	Carr, Bill	2014-05-04	2019-03-08	4 278,00	0,00	6 565,00	1 000 000,00 GBP
10 rows on page 22 total rows							22 295,75	0,00	37 494,80	

Changes Introduced With Redesigned List Views

If you were using OpenAir with the previous user interface, the redesigned user experience brings the following functionality changes:

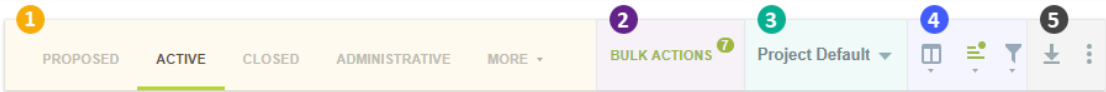
- The new list view toolbar includes a **Bulk actions** panel, a **List view configurations** panel, a **Data** panel grouping the columns, sort and advanced filters tools, a **Download** function and **Other list options**.
- For items with an approval process enabled, the Submitted > Waiting for my approval sub-tab in the previous UI has moved to a new **To Approve** tab for items awaiting your approval.
- The **Bulk actions** button has moved from the column headers in the previous UI to the toolbar in the new UI and it now indicates the number of selected rows.
- The **Advanced filter** has moved from the top of the canvas in the previous UI to a button in the toolbar in the new UI. The advanced filter panel displays under the toolbar when clicking the button.
- Access the **Download** function directly from the toolbar in the new UI instead of the List options dropdown in the previous UI.
- The **List options** cog wheel toolbar icon and dropdown options in the previous UI have been replaced by a new icon and a different set of list options in the new UI, including the number of rows per page setting and the column totals switch.
- **Column Filters** dropdowns include a search box in the new UI.
- The **Clear column filters** has moved from the Tips menu in the previous UI to the list options dropdown in the new UI.
- Improved list view **sorting** feature — You can now control the sort order of your list data from both the column headers and the toolbar with up to three sorting levels.
- Improved **column locking** feature — Change your locked column in one click.
- Improved **page navigation**.
- **Shortcut keys** — 'B' for Bulk actions, 'L' for Saved List view configurations, 'C' for Columns, 'O' for Sort and 'F' for Advanced Filters.

- If the Inline-Editing in List Views optional feature is enabled for your account, you can edit project tasks and bookings from within the project tasks list view and from the project center.

Some but not all list view settings are ported from the previous UI to the new UI or inversely. For example, any column filters set for your list views are maintained. However, column sizes set in one UI version are not maintained in the other UI.

List View Toolbar

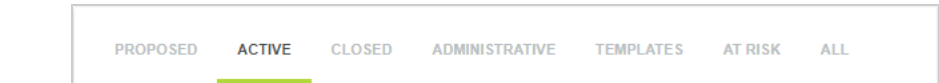
The list view toolbar includes 5 sections giving you quick access to different list view tabs and tools. You can also press a shortcut key to access certain tools.


1 Tab/View navigation — Click one of the tabs or views to go to a different list view tab or to a different view accessible from the list view. See Navigating the List View .
2 Bulk actions — Use the bulk action utility to make changes to any number of selected items in one go. Shortcut key: B . See Bulk Actions .
3 List view configurations — Save your list view configuration for later use, load one of your saved configurations and share them with colleagues. Shortcut key: L . See Saving and Using Custom List View Configurations .
4 Data — Control what data is included in your list view and how it is displayed. The tools in the data panel grouping include: Columns — Select the columns you want to display and set the column order. Shortcut key: C . See Selecting List View Columns . Sort — Sort your list data by column using up to three sorting levels in ascending or descending order. Shortcut key: O . See Sorting the List View Data . Advanced Filters — Apply advanced filters to restrict the number of list view entries according to set criteria. Shortcut key: F . See Filtering Options .
5 Download — Download your list view data as a CSV, HTML or PDF file and import/read your data in your spreadsheet, word processing or PDF tools. See Download Your List View Data . More options — Control the number of rows per page, enable column totals or clear filters. See Other List Options .

Navigating the List View

List views offer tab/view navigation and page navigation.

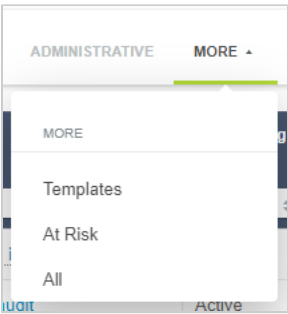
- **Tab/View navigation** — Click one of the tabs or views in the list view tool bar to go to a different list view tab or to a different view accessible from the list view.
 - The available options depend on the particular list view you are viewing. For example, in the Projects list view, each tab represents a project Stage.



For items with an approval status, such as bookings, timesheets or expenses, each list view tab represent a status — Open, Submitted, To approve, Approved, Rejected, Archived, and All. For some list views, such as the bookings list view, the navigation panel also includes other views and tools accessible from the list view. For example, in the bookings list, the tab/view navigation panel may also include links to the Advanced Booking Worksheet, Booking Chart and Resource Booking Planner, depending on the features enabled on your OpenAir account.



- If there is not sufficient space to display all the available tab options, click the **More** header with a small caret ▾ next to it to display a continuation menu.



- **Page navigation** — Click the navigation arrows to go to the first ⏪, previous ⏩, next ⏪ or last ⏩ page or click on the page number and type the page number you want to go to and press the Enter to go straight to that page.



List View Column Headers










You can access several tools and display options directly from the column headers bar:

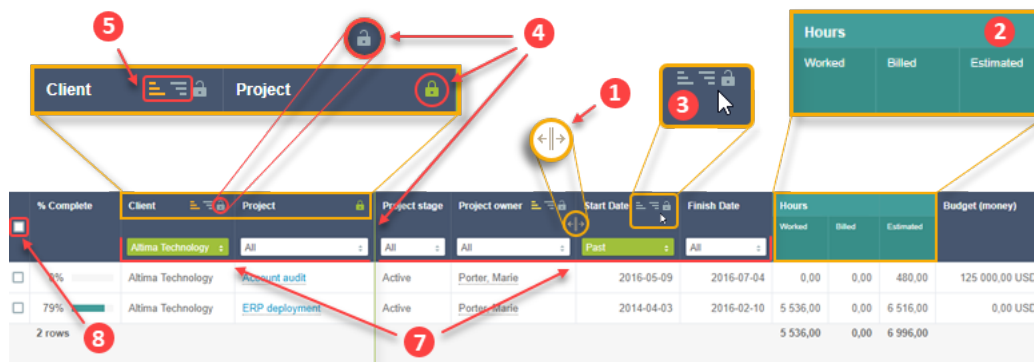
1

Column width — By default, column widths are calculated to provide an optimum fit between the list view content and the available canvas space.

To change the width of a column:

1. Point to the column border.
2. When the mouse pointer changes to a resize cursor ⇄, drag the column border to the required width.

	<p>Note: Consider the following:</p> <ul style="list-style-type: none"> Full use of the available canvas space takes precedence over custom column width. If you change the width of a column, the width of other columns may also change to ensure the list view occupies the full canvas width. You may not be able to reduce a column width below a certain limit. If you set custom column widths manually and navigate away from the list view, these custom column widths will continue to apply the next time you go to the list view. Custom column widths are saved as part of your custom list view configuration. See Saving and Using Custom List View Configurations.
2	<p>Column category — Column headers are displayed on a dark blue color background unless the field or column falls under a field grouping or column category. If the column falls under a field grouping or column category, the column header is split vertically with the column title at the bottom displayed on a green color background and the column category at the top displayed on a lighter green color background. If two or more adjacent columns fall under the same category, the column category shows as one merged cell across those columns.</p>
3	<p>Column options — The available option icons are hidden unless one of the options is enabled for the column. Point to the column header to display the available option icons, which may include the sort ascending, sort descending and column lock icons. If one of the column option is enabled, the available option icons continue to display when you move the pointer away from the column header.</p>
4	<p>Column lock — Click the column lock icon  to lock the list to that column. Everything to the left of the locked column will stay in view when you scroll horizontally. Notice the green locked column icon  next to the title of the locked column and the green column border running through the entire list.</p> <p>Click the locked icon  to unlock the column or click the lock icon for another column to change the locked column.</p>
5	<p>Sort — Point to the column title to display the option icons for the column and click the sort ascending icon  or sort descending icon  next to the column title to sort your list data using up to three sorting levels in ascending or descending order. See Sorting the List View Data.</p>
6	<p>Column tips — The column options include an information icon if contextual tips are available for the column. Click the information icon  to view contextual tips relevant to the column. See List View Contextual Tips.</p>
7	<p>Column filters — Use column filters to restrict the number of list view entries. See Filtering Options.</p>
8	<p>Check the box in the Bulk actions column header to select all items on the page or click the clear all icon  to clear all selected items in the list. See Bulk Actions</p>
8	<p>Expand All / Collapse All — The workspace documents list view lets you expand and collapse all folders in the document tree by clicking the expand all icon  and collapse all icon  in the Name column header.</p>



Bulk Actions

The Bulk Actions feature allows you to make changes to any number of selected items at the same time.

Note: Account administrators can control who can access bulk actions for expenses, timesheets, employees, projects, bookings, charges, billing transactions, and recognition transactions list views by role permission. Go to Administration > Employees > Roles > [Select a role] and check the **Disallow the use of bulk actions in <record type> list views** box to disable bulk actions for that role and list view.

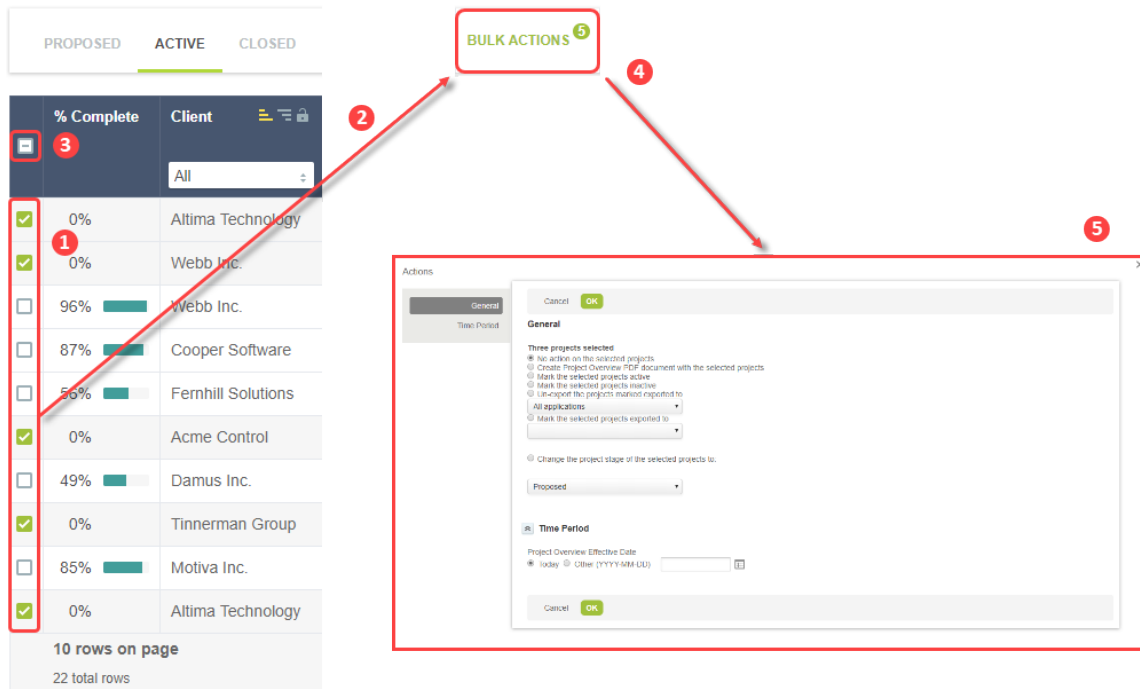
If bulk actions are available for the list view and enabled for your role:

- The bulk actions column is always the first column on the left and shows a box for each row in the list.
- The list view toolbar includes the bulk actions panel.

Otherwise, the bulk actions column and toolbar panel are not available.

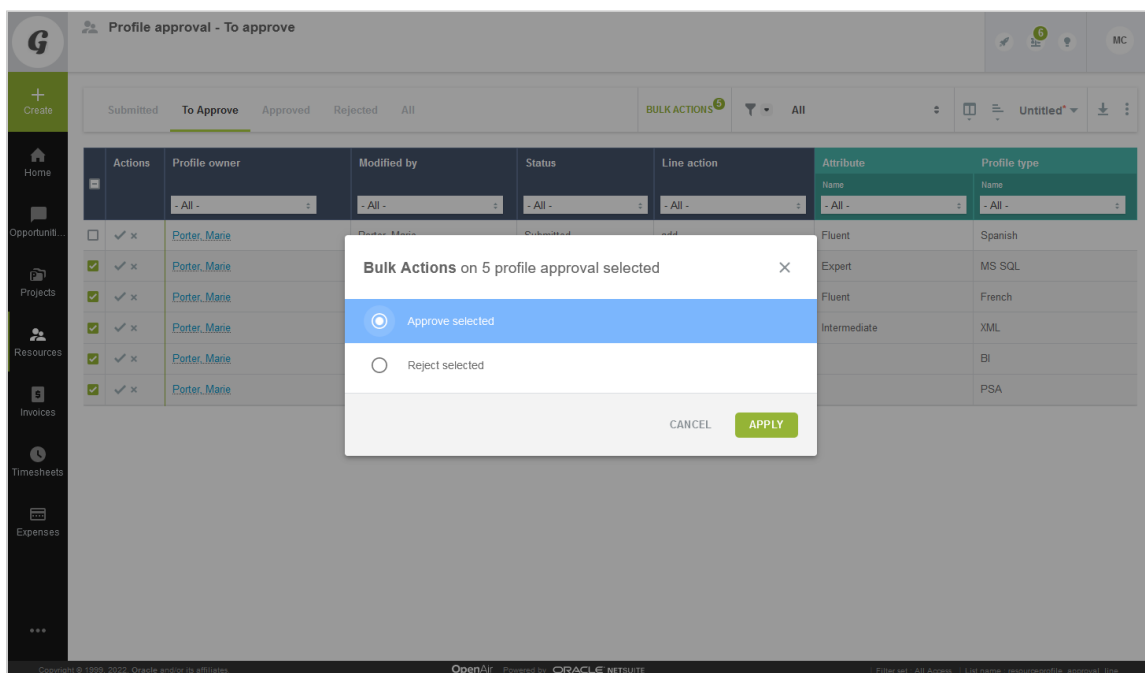
To use bulk actions:

1	Check the box next to the items you want to select. Selected rows are shown with a light gray color background and a green checked box <input checked="" type="checkbox"/> in the bulk actions column.
2	The bulk actions panel in the list view toolbar is highlighted in green whenever items are selected and indicates the number of selected rows across the entire list.
3	Check the box in the column headers to select all items on the page or click the clear all icon <input type="checkbox"/> to clear all selected items in the list.
4	Click Bulk Actions in the toolbar or press B on your keyboard to open the Actions dialog.
5	Select the actions as required and press OK . The available actions depend on the items and on your role permissions.







The following list views feature a redesigned Bulk actions dialog:

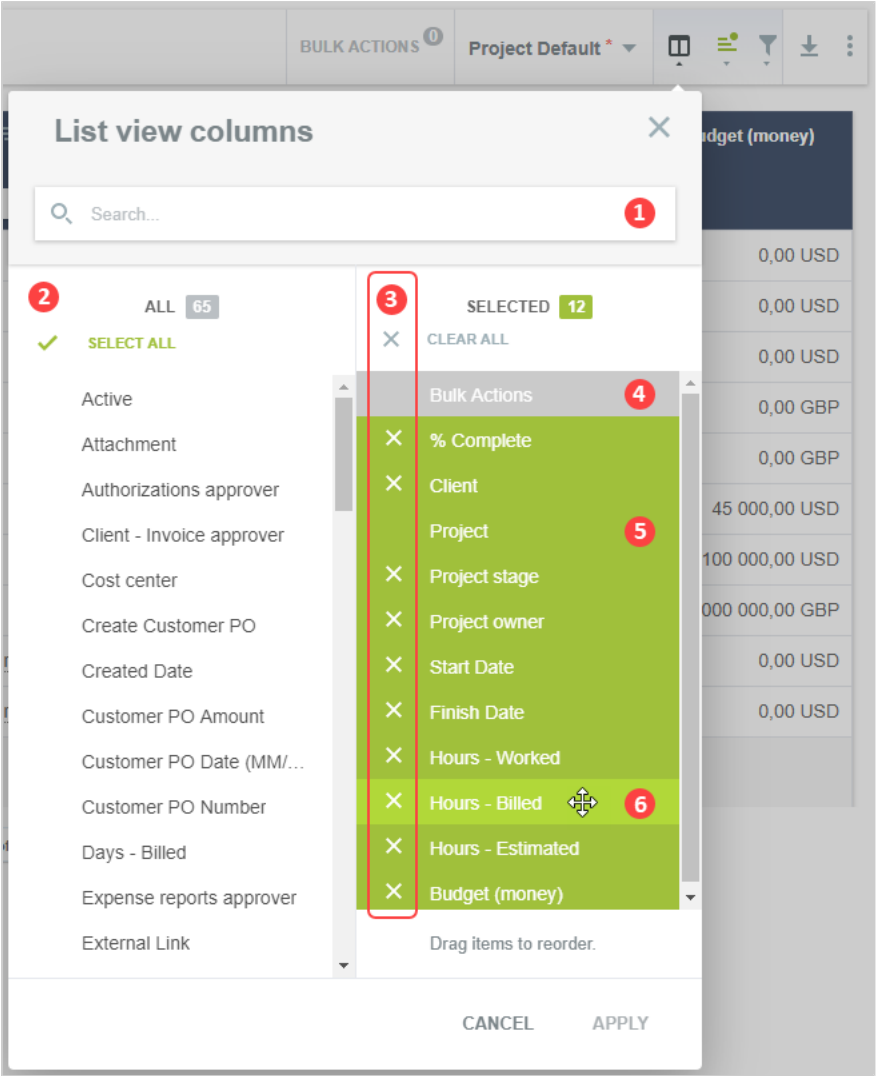
- Reports > Saved Reports
- Resources > Profile approval > To approve
- Workspaces > Documents
- Workspaces > [Select a workspace] > Documents



Selecting List View Columns

Click the Columns icon  in the list view panel or press  on your keyboard to display the **List view columns** flyout panel. Select the columns you want to include in the active list view and specify the column order. Click **Apply** to validate your changes and return to your list view. Any column preferences applied to a list view continue to apply the next time you go to the same list view until you change them or switch to a different list view configuration.

1	Type any characters from a column title in the search box . The lists of available and selected list view columns are filtered as you type and only includes the column titles containing the string you have typed. Matching strings are highlighted in bold in the filtered column list.
2	Click a Column title to include the column in the list view or click Select all to include all available columns.
3	Click the remove icon  next to a selected column title to remove it from the list view or click Clear all to remove all selected columns.
4	Some columns, for example Bulk actions or Actions , are required and set to display as the first columns on the left. You cannot remove them from the list view nor change their position. These columns are displayed with a gray color background.
5	Some columns are required but can be reordered. For example, you cannot remove the Project column from a Project list view but you can change its position. These columns do not have the remove icon  next to the column title.
6	Click a column to select it then drag the selected column to change its position.














✓ **Tip:** You can save these column preferences as part of a custom list view configuration. See [Saving and Using Custom List View Configurations](#).

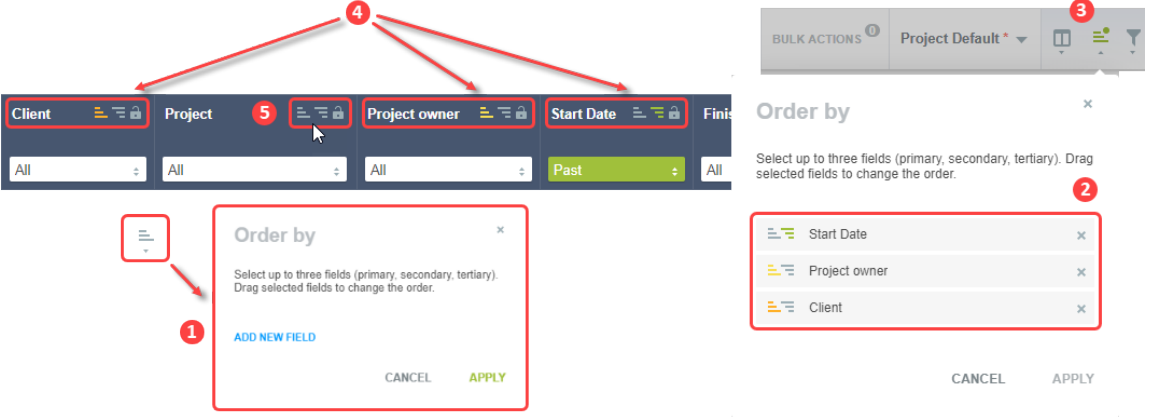
Sorting the List View Data

You can sort your data using the **Order by** panel accessible from the list view tool bar or the sort options available in the column headers. Both methods work together.

This feature supports ascending and descending sort options and multi-level sorting up to three levels. Any sort order applied to a list view continues to apply the next time you go to the same list view until you change it or switch to a different list view configuration.

- | | |
|---|--|
| 1 | Click the sort icon  in the list view toolbar or press  on your keyboard. The Order by panel displays. Click Add New Field and select up to three fields to sort by. |
| 2 | The fields are displayed in the Order by panel. Click one of the icons next to the field name to select between an ascending sort order  or a descending sort order  . |

- Drag the fields up or down to determine the order of your sorting levels.
- The sorting levels are color-coded — green  for the primary, yellow  for the secondary, and orange  for the tertiary sort field. In the pictured example below, the list data is sorted by Start date in descending order, then by Project owner in descending order, and finally by Customer in descending order.
- Click the remove icon  next to a field name to clear that sorting level and stop using that field to order your list.
- Click **Apply** to validate your changes and return to the list view.
- 3** Notice the sort icon is displayed in green color with a dot  to indicate that sorting options have been set for the list view.
- 4** Notice the column headers also indicate the sort order and sorting levels with icons similar to those in the **Order by** flyout panel.
- You can also sort your data directly from the column headers. Point to the column title to display the option icons for the column. Click the Sort Ascending  or Sort Descending  icons. The icons show in green, yellow or orange color if the sort option is enabled for that column.
- 5** You can set up to three sorting levels. The first sort icon you click will make that column the primary sort field. The second and third sort icons you click will make these columns the secondary and tertiary sort fields, respectively.
- When you have set all three sorting levels, the sort icons no longer display for the remaining columns. Click an active sort icon to clear that sort level if you want to sort your data by another column.





Tip: You can save the sort order settings as part of a custom list view configuration. See [Saving and Using Custom List View Configurations](#).



Important: Sorting is disabled if the list view contains more than a threshold number of rows. The threshold depends on the configuration of your OpenAir account.

- A message appears at the top of the list view column headers if the number of rows exceeds the threshold: "Sorting is disabled for list views containing more than <threshold> rows. To reduce the number of rows and restore full functionality, use advanced filters. See [Advanced Filters](#)."
- You can still use the **Order by** panel and the sort ascending or descending buttons. However, any changes will have no effect on the order your list view data is displayed if the number of rows exceeds the threshold.

Filtering Options

You can limit the data displayed in the list view based on criteria you specify. There are two features you can use to achieve this:

- [Column Filters](#) — Searchable dropdown options accessible directly from the column headers bar let you limit your data by matching fields to specific values or range of values.
- [Advanced Filters](#) — Flexible filtering options accessible from the list view toolbar let you refine your list view to show exactly the data you need.

Column Filters


Column filters are dropdown boxes located in the column headers bar. Click the dropdown box to display a searchable list of value options. Select the desired options to set the column filter.

Depending on the column, the value options will be listed in one of the following formats:

- Distinct values: All (default), List of distinct values. Non-unique values only appear one time.
- Alphabetical: All (default), First alphabetical and numerical character [A-Z, 0-9].
- Date: All (default), List of redefined date ranges.

The feature includes the following characteristics. Column filters are:

- Searchable — Type any number of characters in the dropdown search box to display only the options containing your search string. The list of available value options is filtered as you type. Matching strings are highlighted in bold in the filtered options list.


 **Note:** Distinct value column filter dropdowns show up to 50 options initially.


To show distinct value options that are not included in the initial list, type at least three characters in the search box. The list of distinct value options is filtered as you type with matching terms highlighted in bold. Filtering as you type only filters through the 50 distinct values loaded initially. To search for all matching values, click **Search All**.

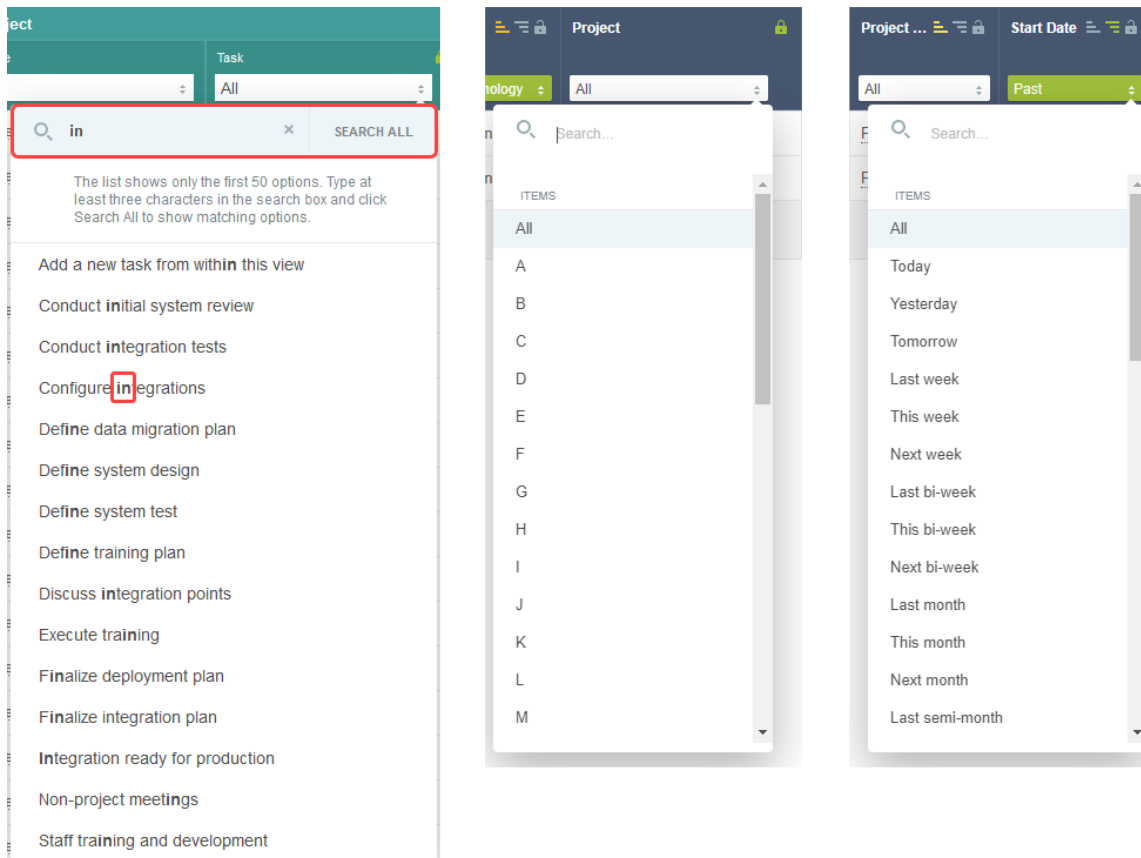
The dropdown will show a list of up to 1000 distinct values containing your search term. If there are more than 1000 matching values in the database, only the first 1000 values are returned as search results and a message appears above the search results. Refine your search as necessary until there are less than 1000 matching values, then type additional characters to filter the search results.

If there are less than 50 distinct values in the column filter dropdown, no search is required. All possible options may already be listed if other filters are already used to refine the list view data. For example, if you are using column filters on the project or resource columns, to refine the list view data, there may be less than 50 distinct value options for the tasks column filter, in which case the dropdown shows all options, and a search is not required.

- Easily identifiable — When a column filter is applied, the column filter dropdown box is highlighted with a green color background and shows the selected filter option. Multiple column filters — You can apply multiple column filters to the list view.
- Remembered — Any column filters applied to a list view continue to apply the next time you go to the same list view.

 **Note:** If you were using OpenAir with the previous user interface, applied column filters are not affected by the change to a different version of the user interface. Any column filters you applied to the list view before the change to the new UI will be maintained if you are using the new UI the next time you go to this list view.

- Easily cleared — To clear all column filters applied to the list view, click the List options icon  and click Clear column filters from the List options dropdown panel.



✓ **Tip:** You can save any combination of column filters as part of a custom list view configuration. See [Saving and Using Custom List View Configurations](#).

Opening a List View from QuickViews and Other Screens — Preset Column Filters

You can go to specific list views by clicking links available in a QuickView window, in other screens such as the Booking chart or the Assignments chart, or in some of the portlets, such as the My Status portlet, on the Home and Dashboard screens. When you click a link in a QuickView or Booking chart which refers to a list view, the list view opens with predefined column filters already applied. The column filters are set to list context-specific data in them list view.

For example:

- QuickViews give you access to additional information, actions and quick navigation options for certain items in any list views — See [QuickViews](#). The QuickView for a Project will include quick navigation links to Time entries, Receipts, Charges and Invoices list views. Clicking one of these links opens a list view showing only the Time entries, Receipts, Charges and Invoices for that specific Project. The column filters for the Project and Customer columns will be preset when the List view displays.
- The Booking chart lets you see booking data in a visual chart and gives you an overview of bookings for one or more employees. Clicking on a bar in the chart opens the Bookings list view listing only the bookings for the selected Resource, or all bookings, for a specific period of time. The column filters for the Resource, Start date and End date columns will be preset when the List view displays.

Webb Inc. [PSA module deployment](#)

Fernhill Solutions [Financial integration](#)

Motiva Inc. [CRM implementation](#)

PSA module deployment News Feed

Start - Finish 2014-11-17 - 2015-10-28 Project owner Collins, Marc

Project location Client Webb Inc.

Quick navigation

Project Resource management Financial Timesheets / Expenses

Dashboard Booking planner Budget Time entries

Outline Task assignments Analysis Invoices

Gantt Pricing Charges

Worksheet Billing Invoices

List Recognition

Date Employee Timesheet Client Project Hours

Name Start date Status

All All All All Motiva Inc CRM implementation



Note: Review the following guidelines:



- Filtered columns will be automatically added to the list view if not present in the active or remembered list view configuration.
- Date Column filters are preset to custom date ranges matching a period of time in the Booking chart. These custom date ranges are temporary and will not be available in the dropdown options after you have cleared or changed the value for that column filter.
- Opening a List view using a quick navigation link in a QuickView or in the Booking chart overrides the remembered list view configuration. The Column filters will continue to apply the next time you go to that List view unless you clear or change the values set for those column filters.
- Column filters are not currently preset when opening to a list view by clicking a quick navigation link in the Assignment chart.

Advanced Filters

Advanced filters are accessible from the list view toolbar and let you refine your list view using filter conditions to show exactly the data you need.



Tip: Use advanced filters to reduce your list view data and only include the data directly relevant to your task. This will help your list views load faster and in some cases may restore full functionality to your list views. See [List View Data](#).



Click the Filter icon  in the list view tool bar or press **F** on your keyboard to show or hide the advanced filters panel under the list view toolbar. If an advanced filter is currently applied to your list view, the Filter icon is displayed in green color .

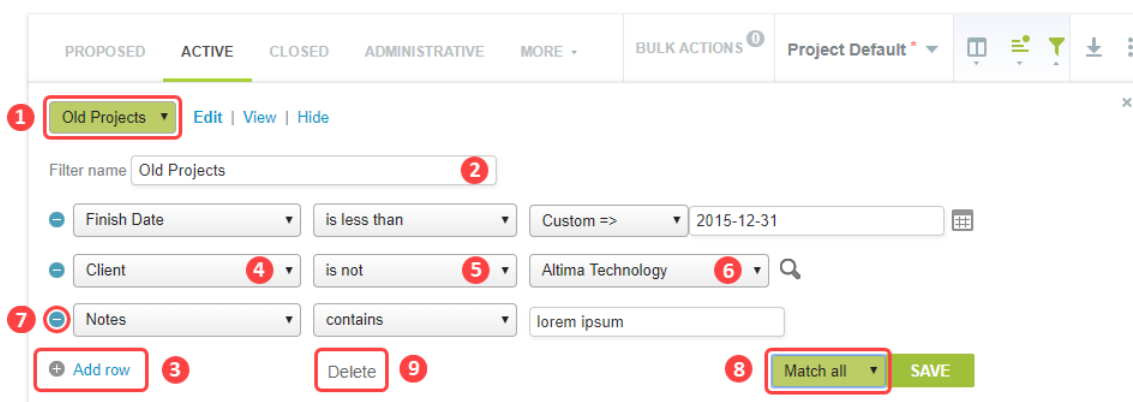
Currently, two versions of the advanced filters user interface are available. Both have similar functionality but different layouts.

- **Default Advanced Filters UI** — The default advanced filters user interface lists filter conditions vertically (one filter condition per line). For complex filters. You select and apply a filter from the flyout panel and not from the toolbar.
- **Redesigned Advanced Filters (Optional Feature)** — The Redesigned Advanced Filters optional feature changes the user interface for advanced filters on redesigned list views. The redesigned advanced filters panel is compact and lists filter conditions horizontally instead of vertically. It lets you select and apply saved filters directly from the list view toolbar instead of the flyout panel. The new layout brings better usability and takes less of your canvas space.

Default Advanced Filters UI

The default advanced filters user interface lists filter conditions vertically (one filter condition per line). For complex filters. You select and apply a filter from the flyout panel and not from the toolbar.

1	Click the dropdown to select one of your saved Advanced Filters or create a new one. Click Edit to modify the filter settings, View to display the filter criteria or Hide to display only the filter name. Select All from the dropdown to disable any Advanced filter currently applied to your list.
2	Give your advanced filters a descriptive name so you can re-use them in future. After you have set or modified the filter condition, click Save to validate your changes and return to your list view.
3	Click Add row to add a new filter condition.
4	Click the dropdown box further left in the filter condition row to select a field.
5	Click the middle dropdown box to select a comparison operator from the available options.
6	Depending on the chosen field and comparison operator, define a value or a range of values by either typing, selecting a value or range from predefined dropdown options, or setting a custom value.
7	Click the Delete row icon  next to a row to delete that criterion.
8	Click the dropdown field and select Match all if the results must match all specified filter conditions (AND logical operator) or select Match any if the results must meet at least one of the specified filter conditions (OR logical operator). <div> Note: The default logical operator for list view advanced filters is Match all. Whenever possible, set advanced filters to match all specified filter conditions for optimum list view performance.</div>
9	Click Delete to delete the saved advanced filter. The deleted advanced filter will no longer be available for selection.



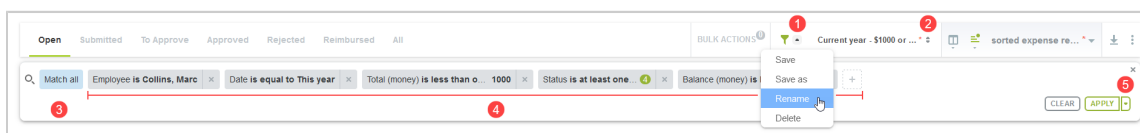
The screenshot shows the 'Old Projects' flyout panel. At the top, there are tabs: PROPOSED, ACTIVE (selected), CLOSED, ADMINISTRATIVE, and MORE. To the right are BULK ACTIONS and Project Default. The flyout panel has a close button (X) in the top right. Inside, there's a 'Filter name' field with 'Old Projects' (labeled 2). Below it are three filter conditions, each with a minus icon on the left:


- Condition 1: 'Finish Date' (labeled 4) 'is less than' (labeled 5) 'Custom =>' (labeled 6) '2015-12-31'.
- Condition 2: 'Client' (labeled 4) 'is not' (labeled 5) 'Altima Technology' (labeled 6).
- Condition 3: 'Notes' (labeled 4) 'contains' 'lorem ipsum'.

 At the bottom of the flyout panel, there's an 'Add row' button (labeled 3), a 'Delete' button (labeled 9), a 'Match all' dropdown (labeled 8), and a 'SAVE' button. On the left side of the flyout panel, there are numbered red circles 1 through 9 corresponding to the steps in the table above.

Redesigned Advanced Filters (Optional Feature)

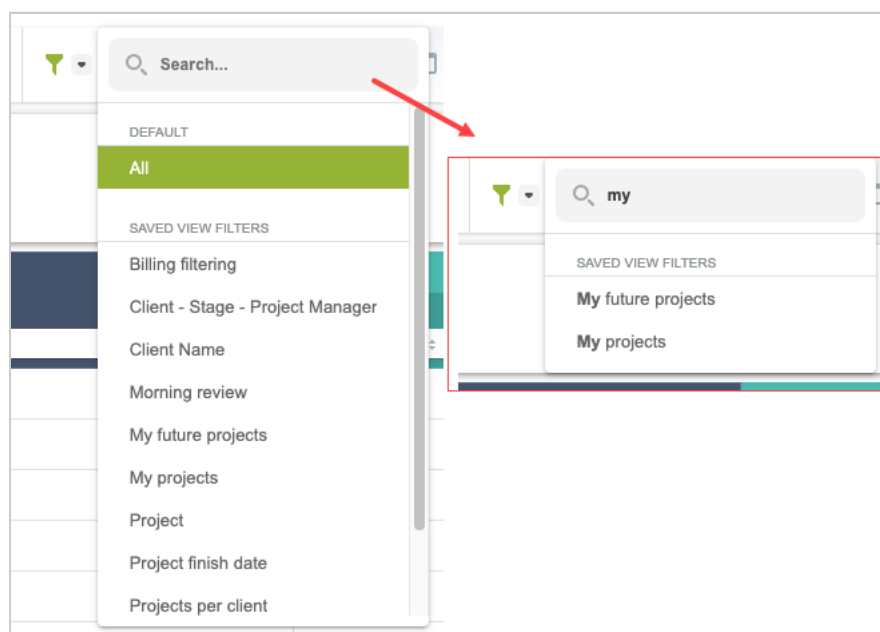
The Redesigned Advanced Filters optional feature changes the user interface for advanced filters on redesigned list views. The redesigned advanced filters panel is compact and lists filter conditions horizontally instead of vertically. It lets you select and apply saved filters directly from the list view toolbar instead of the flyout panel. The new layout brings better usability and takes less of your canvas space.



1. Click the caret icon  and select an option to save, save as, rename or delete the filter.
2. The filter selector in the list view toolbar shows the name of the filter that is currently applied to your list view, or **All** if no filters are applied.


The filter selector includes a search bar. To search for a specific filter, type a few characters of the filter names in the search bar. The dropdown list is refined as you type to show only the saved filters with names list matching your search string.


- The default name for new filters is "Unsaved filter".
- A red asterisk * next to the filter name indicates there are unsaved changes.
- Click the filter name to select and apply one of your saved filter, or to clear advanced filters and show **All** data. To search for a specific filter, type a few characters of the filter names in the search bar. The dropdown list is refined as you type to show only the saved filters with names list matching your search string.



3. The logical operator is shown in light blue color background. Click the logical operator to change it. Select **Match all** if the results must match all specified filter conditions (AND logical operator) or select **Match any** if the results must meet at least one of the specified filter conditions (OR logical operator).

Note: The default logical operator for list view advanced filters is **Match all**. Whenever possible, set advanced filters to match all specified filter conditions for optimum list view performance.

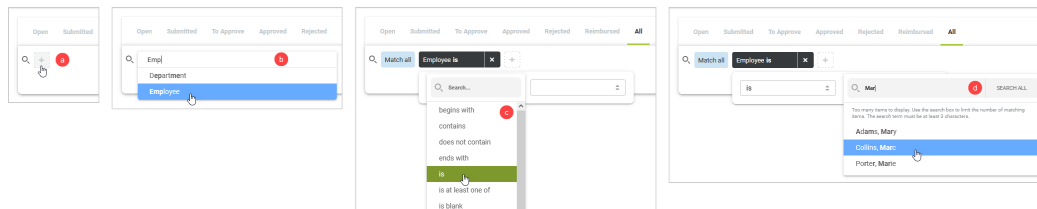
4. Each filter condition shows the field name, the comparison operator and the value in a simple sentence structure. If multiple values are selected, the filter conditions shows a number  indicating the number of values selected instead of the value.

Click a filter condition to modify it, or click the clear icon  to remove a filter condition.

Note: The filter panel shows a maximum of three rows of filter conditions when you first open it. A **+ <n>** button indicates there are <n> more additional filter conditions defined for this filter. Click **+ <n>** to expand the filter panel and show all filter conditions.

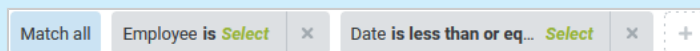
To add a new filter condition:

- a. Click the add icon in the advanced filter panel.
- b. Enter a field name. A list of matching available field names appears and is updated as you type, with exact and closest match at the top of the list. Select the relevant field.
- c. Select a comparison operator.
- d. (Optional) Select one or more values, or a range from predefined dropdown options, or enter a custom value, depending on the field type and comparison operator.



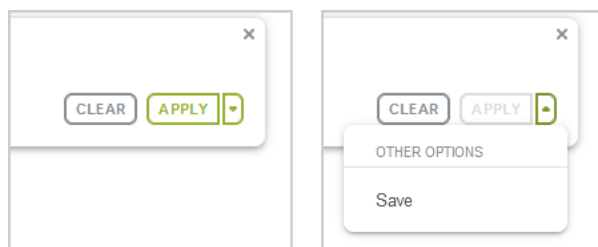
Note: Review the following guidelines:

- You must add at least one filter condition before you can save the filter.
- It is not necessary to select or enter a value for each filter condition you define. The filter condition will be ignored if the value is not specified. This may be helpful if you want to configure saved filter templates, which you can then adapt by selecting relevant values for each filter condition.

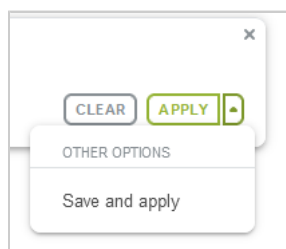


- The customer dropdown list in the Redesigned Advanced Filters feature shows additional customers information in addition to the customer Name, depending on your OpenAir account configuration. See [OpenAir Administrator Guide](#).
- The resource or employee dropdown list in the Redesigned Advanced Filters feature lets you search and select both active and inactive employees as values in your filter conditions depending on your account configuration. See [OpenAir Administrator Guide](#).

5. Click **Apply** to preview the advanced filter results before saving the changes you made to the filter. The list view shows the items matching all filter conditions in the filter panel including any unsaved changes you made to the filter conditions. You can then click the caret next to **Apply**, and click **Save** to save the changes you made to the filter.




Alternatively, click the caret next to **Apply**, then click **Save and Apply** to save the changes you made to the filter before viewing the advanced filter results.

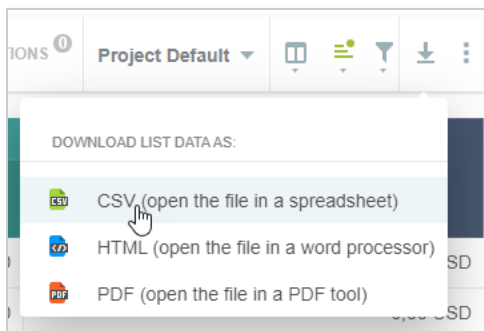


6. Click **Clear** to clear all filter conditions.

Download Your List View Data


Click the Download icon  in the List view toolbar to download your list view data. You can export your list view data in one of the following file formats:

- CSV — CSV is a widely supported format for tabular data import. Use this option if you want to import the list view data into a spreadsheet or a Business Intelligence (BI) tool, for example.
- HTML — Use this option to import the list view data as formatted and editable text into a word processing tool, for example.
- PDF — Use this option to view the list view data in a PDF tool or to distribute the list view data.



Note: The downloaded list view data uses all redesigned list view configuration options, including multiple sorting levels.

Other List Options

Click the More options icon  in the List view toolbar to access the following options:

1	<p>Set the number of rows per page. 1000 rows per page is the maximum allowed so as not to compromise performance when displaying large list view data.</p> <p>If you change the number of rows per page, OpenAir reloads the list view at the relevant page. After you change the option, the new page contains the first row which was displayed in the old page before you changed the number of rows per page option.</p> <div> <p>Note: If the number of rows per page is set to 100 or higher, OpenAir renders your list view data progressively as you scroll. See Rendering Rows of Data as You Scroll.</p> </div>
2	<p>Column totals for all numeric columns, including monetary values. Click the Column totals toggle to turn the feature on/off.</p> <p>When Column totals are enabled, the totals for the current page are displayed in bold type at the bottom of the numeric columns and the totals for the whole data across all list view pages are displayed underneath the page totals.</p>
3	<p>The total number of rows in the page and across all list view pages are displayed at the bottom of the first non-numeric column.</p> <p>If multicurrency is enabled for your account and the list view column contains monetary values in two or more currencies, click Currency subtotals to view subtotals for all currencies included in the list view data. See Multicurrency Monetary Column Totals.</p>
4	<p>Click Clear column filters to reset all column filters applied to your list view.</p> <p>Click Clear advanced filters to reset all advanced filters applied to your list view.</p>

Click **Clear all filters** to reset all column filters and advanced filters applied to your list view.

Start Date	Name	Status	Employee	# of hours
All	All	Open	All	
2020-02-01	2020-02-01 to 2020-02-29	Open	Collins, Marc	
2020-02-01	2020-02-01 to 2020-02-29	Open	Porter, Marie	
2019-12-31	2019-12-31 to 2020-01-30	Open	Collins, Marc	
2016-09-25	2016-09-25 to 2016-10-25	Open	Collins, Marc	
2016-08-26	2016-08-26 to 2016-09-24	Open	Collins, Marc	
2016-07-26	2016-07-26 to 2016-08-25	Open	Collins, Marc	
2016-06-26	2016-06-26 to 2016-07-25	Open	Collins, Marc	
2016-05-26	2016-05-26 to 2016-06-25	Open	Collins, Marc	
2016-03-26	2016-03-26 to 2016-04-24	Open	Collins, Marc	
2016-02-24	2016-02-24 to 2016-03-25	Open	Collins, Marc	
10 rows on page				23,00
21 total rows				330,00

ROWS PER PAGE

10 (selected)

20

50

100

1000

LIST OPTIONS

☒ Column totals

FILTERS

Clear column filters

Clear advanced filters

Clear all list filters

Multicurrency Monetary Column Totals

You can view monetary subtotals for each currency if multicurrency is enabled for your account and the list view column contains monetary values in two or more currencies. Currency subtotals are available both for the page and for the entire list view.

- To view the currency subtotals for the page you are currently viewing, click the **Currency subtotals** link in bold type at the bottom of the monetary column.
- To view the currency subtotals for the whole data across all list view pages, click the **Currency subtotals** link in smaller and normal weight type underneath.

The column totals row shows the total monetary value in place of the **Currency subtotals** link if all monetary values on the current page or across all pages are in the same currency.

The diagram illustrates the process of viewing currency subtotals. It shows a table with columns: Start Date, Name, Status, Employee, and # of hours. The # of hours column contains monetary values in AUD, CAD, and USD. Two popups are shown: one for 'Currency subtotals for records with the same currency on this page' and another for 'Currency subtotals for records with the same currency across all pages'. Red arrows point from the 'Currency subtotals' links in the table to the corresponding popups.

Saving and Using Custom List View Configurations

The Save List View Configurations optional feature lets you save custom configurations for your list views, load any configurations saved previously and, if your role permits, share these configurations with other users.

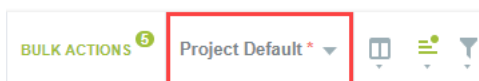
Several features enable you to customize the active list view and adapt it to your specific needs. After you have customized the list view, you can save the custom configuration settings for future use.

You may want to use different configurations for the same list view for different duties. This feature lets you switch between several configurations saved for the same list view.

You can save custom configurations for any existing list view. However, each saved configuration is associated with the specific list view it was created for. It cannot be applied to other list views. For example, list view configurations for Expenses list views cannot be applied to Timesheets list views.

Account administrators and users with the relevant role permissions can create public list view configurations, which other users can apply, or default list view configurations for new employees.

The name of the List view configuration currently applied to your list view is displayed in the List view toolbar. When you go to a list view for the first time, the List View configuration panel in the list view toolbar displays either the name of the default list view configuration, if one was set by your account administrator, or “Untitled”, if it is the system default.



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.

The list view configuration saves the following list view properties:

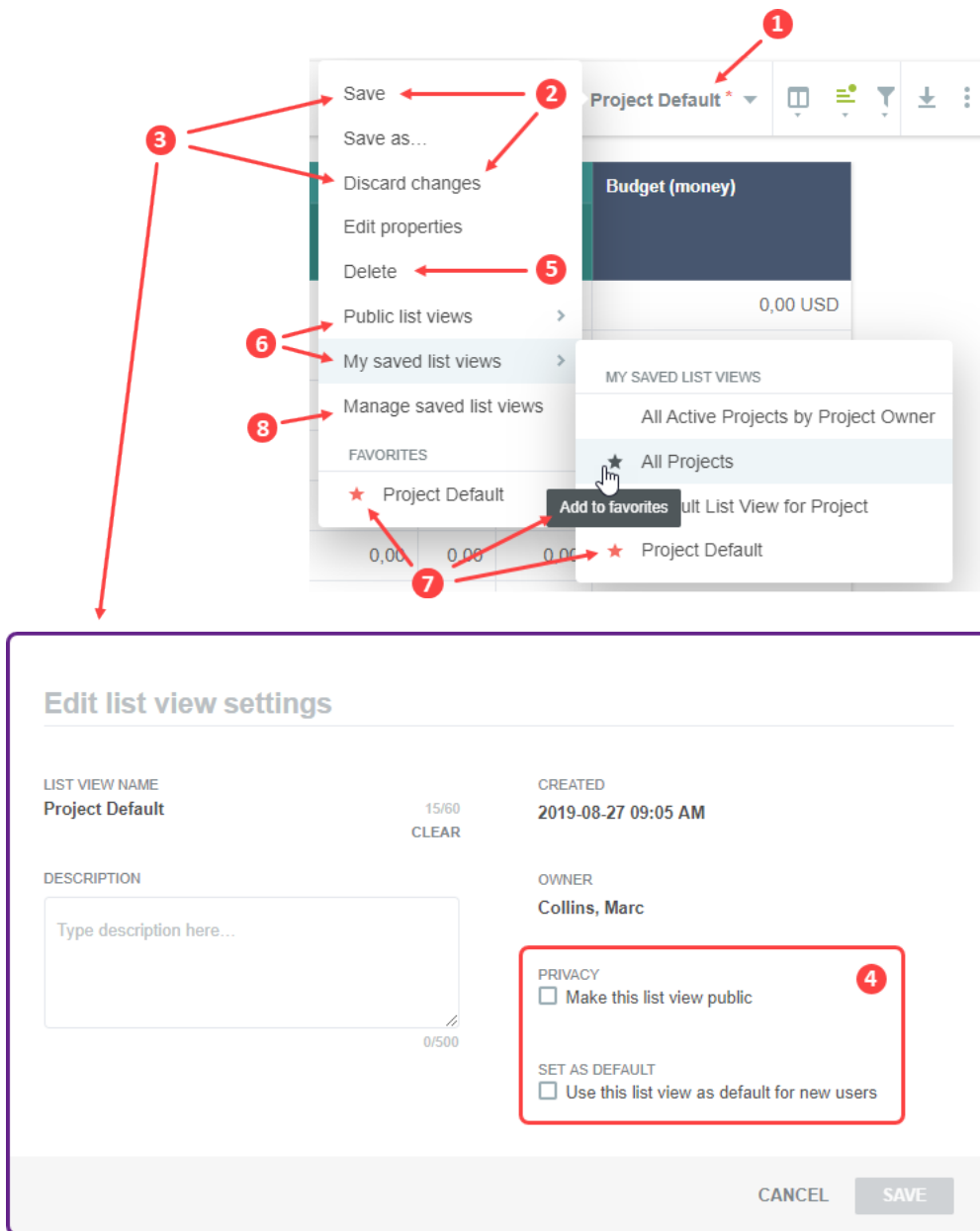
- Selected columns and column order — See [Selecting List View Columns](#).
- Sorting options including the columns your list view data is ordered by, the sorting levels and the sorting order for each column — See [Sorting the List View Data](#).
- Column filters — see [Column Filters](#).
- List display options such as custom column widths (see [List View Column Headers](#)) and number of rows per page (see [Other List Options](#)).

Note: The following list view properties are not saved as part of the list view configuration:

- Column lock and column totals settings.
- Advanced filters — Note however that you can save advanced filters separately. See [Advanced Filters](#).



- 1 The toolbar panel shows the name of the configuration currently applied to the List view
Click the name of the active list view configuration in the toolbar or press **[L]** on your keyboard to display the List view configuration flyout menu. A red asterisk * displays next to the List view configuration name if there are any unsaved changes.

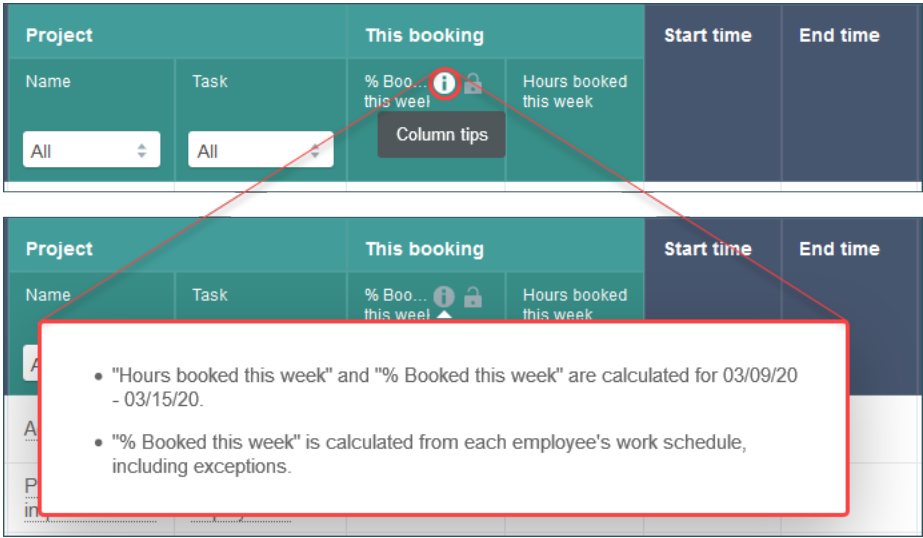
2	<p>If there are any unsaved changes, the Save menu option is available. Click Save to overwrite the previously saved configuration with the modified one.</p> <p>Click Discard changes to return to the last saved version of the list view configuration. A confirmation dialog displays. Click OK to confirm. This action cannot be undone.</p>
3	<p>Click Save as ... to create a new list view configuration based on the active configuration and save any changes made to a new configuration instead of the active configuration. The New list view settings window displays. Enter a descriptive name for the new configuration in the List view name field, an optional up to 500 characters long Description and click Save. The new configuration name displays in the toolbar panel.</p> <p>You can edit the name and description of the saved configuration at any time. Click Edit properties to modify the configuration properties.</p>
4	<p>If your role permissions allow you to do so, you may check either or both the Make this view public and Set this list view as default for new users boxes.</p>
5	<p>You can delete the configuration if it is no longer required. After you click Delete, a confirmation dialog displays. Click OK to confirm.</p>
6	<p>Click the My saved list views or Public list views menu options to display a list of all configurations you have created or all created and shared by others for this list view. Click a configuration name to apply that configuration to the list view.</p>
7	<p>You can set the configuration you use most frequently as favorites for easier access. Point to one of the configurations in My saved list views or Public list views. A star icon ★ displays next to the configuration name. Click the icon to mark this configuration as a favorite. Favorite configurations display at the bottom of the List view configurations menu under a Favorites section with a red star icon ★ next to their name. To remove a configuration from your favorites, click the red star icon next to its name.</p>
8	<p>Click Manage saved list views to display a dedicated screen listing. From that screen you can delete configurations one at a time or in bulk. You can also apply a configuration to a list view by clicking the Apply to list view link in the Actions column.</p>



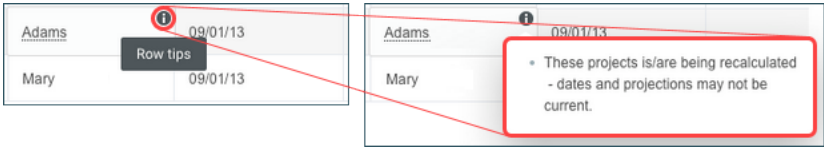
List View Contextual Tips

Contextual tips specific to the list view you are currently viewing are available at three levels:

- **List view contextual tips** — Click the Tips button  to display contextual tips and information related to the list view you are currently viewing or to the OpenAir module the list view is part of. See [Tips Button](#).
- **Column contextual tips** — The column options in the column headers include an information icon if contextual tips are available for the column. Click the information icon  to view contextual tips relevant to the column. See [List View Column Headers](#).



- **Cell contextual tips** — List view cells include an information icon if contextual tips are available. Click the information icon ⓘ in the top right corner of the cell to view contextual tips relevant to that field or record. See [List View Data](#).














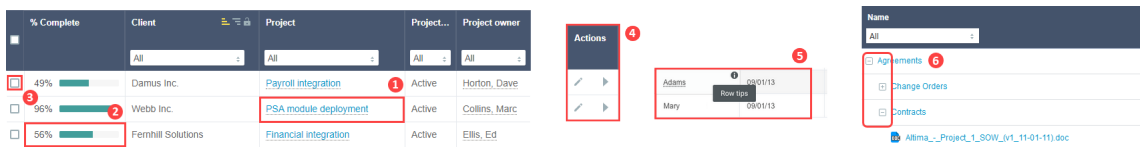
List View Data


List view data is presented in a tabular form according to the Column configuration, Sorting, Filtering and other List options you have specified. List views let you have an overview of a specific set of data and let you select and go to the particular item you want to work on.

From the list view you can:

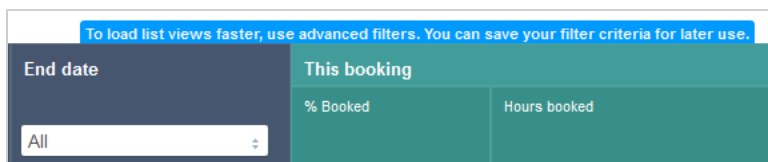
1	Go to one of the listed records — Click the name of the record to display the record screen.
2	Monitor the progress of your projects at a glance.
3	Some list views include a Bulk actions column. The Bulk actions column is always the first column on the left, when present, and cannot be moved. Select records and run bulk actions on the selected records. See Bulk Actions
4	<p>Some list views include an Actions column. The Actions column is always the first or second column on the left, when present, and cannot be moved. Depending on the list view, the following actions may be available:</p> <ul style="list-style-type: none">■ Add New — Click the add new icon + to crate a new record.■ Delete — Click the delete icon 🗑 to delete the record, document or report.■ Download — Click the download icon ⬇ to save the workspace document or the report on your computer.■ Duplicate — Click the duplicate icon 📄 to create a copy of the record.■ Edit — Click the edit icon ✎ to open the record form.■ File — click the file icon 📁 to place the report in a folder or remove it from its current folder.

	<ul style="list-style-type: none"> ■ Publish — click the publish icon  to publish the report to the OpenAir OData service. ■ Replace — Click the replace icon  to replace a workspace document ■ Run — Click the run icon  to run the report. ■ Schedule — click the schedule icon  to run or publish the report automatically according to a specific schedule. ■ Share — Click the share icon  to share the report with other employees. ■ View — Click the view icon  to show a non-editable view of the record. ■ View Document — Click the view document icon  to view a workspace document. ■ More actions — Click the more icon  to display additional action options.
5	Cell tips — List view cells include an information icon if contextual tips are available. Click the information icon  in the top right corner of the cell to view contextual tips relevant to that field or record. See List View Contextual Tips .
6	Expand / Collapse — The workspace documents and saved reports list views let you expand and collapse folders by clicking the expand icon  and collapse icon  next to the folder name.

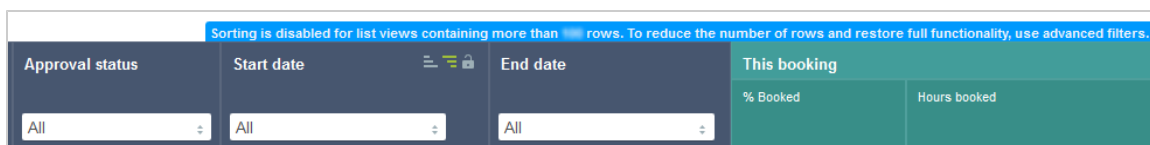



 **Tip:** List views with fewer rows load faster. To reduce the number of row, use advanced filters.

A tip appears at the top of the list view column headers if the list view contains more than 500 rows:



Some list view features, such as [Sorting the List View Data](#), are disabled if the list view contains more than a threshold number of rows. The threshold depends on the configuration of your OpenAir account. A message appears at the top of the list view column headers if the number of rows exceeds that threshold:



 **Tip:** Reduce the number of rows using advanced filters to load list views faster or restore full functionality. See [Advanced Filters](#).

Some of the list view features depend on your account configuration:

- The following optional features change some of the list view behavior and functionality:
 - [Rendering Rows of Data as You Scroll](#)

- [Display Options for Long Text Cells in List Views](#)
- The following optional features extend the capabilities of the list view data beyond an overview and navigation tool:
 - [QuickViews](#)
 - [Inline-Editing in List Views](#)
 - Project Center — See [Working with the Project Center View](#)

Note: To check whether these features are enabled in your OpenAir configuration, contact your account administrators.

Rendering Rows of Data as You Scroll

OpenAir renders rows of data as you scroll the list view if the number of rows per page is set to 100 or higher. If this is the case, OpenAir only prepares for display the rows that will be visible on your screen as well as extra rows of data up and down the list. Additional rows will be rendered progressively as you scroll up and down. This reduces the demands on your browser and let your list views load faster.

Note: You can only search the rendered rows using the browser “Find in page” feature (Ctrl + F). You cannot search through all 100 or 1000 rows in a page using Ctrl + F.

Display Options for Long Text Cells in List Views

Depending on your account configurations, list views display long text cells differently. Account administrators can select to wrap long text and text area field values on multiple lines in list view cells or display it in truncated form on a single line.

- **Single line** (Default) — By default, redesigned list views display text and text area field values on a single line by default. Line feeds are removed to show more information. List views are more compact. If the entire text does not fit the cell, only part of the text is displayed with ellipses to indicate the text is truncated. To view the full text, point to the cell or click **Read more** inside the cell (for longer text content).

ABC Co.	simple slack test		Active
Altima Technology	Project Center implementation		Active
This company name...	Data Center Migration to Oracle Cloud Infrastructure		Active
Pegasus Inc	Pegasus		Active

ABC Co.	simple slack test		Active
Altima Technology	Project Center implementation	This is an example of a very long text area cell content. It demon...	Active
This company name is too long to fit in a small box		This is an example of not so long text area cell content to demonstrates th...	Active
Pegasus Inc	Pegasus	This is a short text	Active

- **Wrap text** — If the Wrap Text in List View Cells feature is enabled for your account, OpenAir wraps long text and text area field values on multiple lines in list view cells. List views are less compact. For longer text content, only part of the text is displayed with ellipses to indicate the text is truncated. To view the full text, click **Read more** inside the cell.

ABC Co.	simple slack test	This is an example of a very long text area cell content. It demonstrates the option to wrap long text cells or to display on a single line. OpenAir shows long content on a single line by default in order to display more rows of data on your screen. To wrap long text cells over multiple lines, contact OpenAir support and request the Wrap text cells optional feature to be enabled for your account.	Active
Altima Technology	Project Center implementation	This is an example of a very long text area cell content. It demonstrates the option to wrap long text cells or to displ...	Active
This company name is too long to fit in a small box	Data Center Migration to Oracle Cloud Infrastructure	This is an example of not so long text area cell content to demonstrates the new wrap text and single line options.	Active
Pegasus Inc	Pegasus	This is a short text	Active
ABC Co.	simple slack test		Active
Altima Technology	Project Center implementation		Active
This company name is too long to fit in a small box	Data Center Migration to Oracle Cloud Infrastructure		Active
Pegasus Inc	Pegasus	This is a short text	Active

Longer text area cell content is truncated whether the wrap text option is enabled or disabled. To view the full text, click **Read more**. The full text appears in a popup box. Click the close icon **x**, press the Esc key or click outside the box to close the popup box and return to the list view.

Note: These display options do not apply to the **description** column in the following list views. The entire cell content is always shown and line feeds are supported.

- Projects > [Select a Project] > Financials > Billing > Rules
- Projects > [Select a Project] > Financials > Recognition > Rules

QuickViews

QuickViews give you access to additional information, actions and quick navigation options for certain items in any list views. Quickviews are available for the following items:

- Bookings
- Employees
- Projects
- Tasks

When QuickViews are enabled for a particular item, the item is underlined with a dotted line. Point to the item to view the QuickView panel with context-specific details including:

- General information about the item.
- Specific Details such as the Employee's Skills, for example.
- Action links such as a New booking Create action or Add to Resource Comparison, for example.
- Quick navigation links to specific forms, screens and list views, filtered where appropriate to show only the relevant data.

- Note:** Account administrators can enable QuickViews for each item separately and set the default delay between the time you point to the item name and the time the QuickView panel appears at the account level.
- To enable QuickViews, go to Administration > Global Settings > Account > Optional Features, and check the **Enable QuickView for <record type>**.
 - To set the default QuickView delay, go to Administration > Global Settings > Display > Interface: Display, and enter the **QuickView popup activation delay** in seconds under Display options.
- You can change the QuickView delay or disable QuickViews. To do so, go to User Center > Personal settings, and:
- To set the QuickView delay, enter the **QuickView popup activation delay** in seconds under Display options.
 - To disable QuickViews, check the **Disable QuickViews** box under Display options.

Actions	Resource	Project	Booking type	Start d...	End d...	This booking		Profile type
						% Book...	Hours boo...	
	Carr, Bill	All	All	All	All			
<input type="checkbox"/>	Carr, Bill	Add-on services	Tentative	2016-03-14	2016-03-27	14,00	10,50	
<input type="checkbox"/>	Carr, Bill	Add-on services	Tentative	2016-03-28	2016-04-10	100,00	67,50	
<input type="checkbox"/>	Carr, Bill	Add-on services						
<input type="checkbox"/>	Carr, Bill	Add-on services						
<input type="checkbox"/>	Carr, Bill	Upsell account au						
<input type="checkbox"/>	Carr, Bill	Upsell account au						
<input type="checkbox"/>	Carr, Bill	Upsell account au						
<input type="checkbox"/>	Carr, Bill	ERP implementati						
<input type="checkbox"/>	Carr, Bill	ERP implementati						
<input type="checkbox"/>	Carr, Bill	ERP implementati						

Add-on services News Feed X

Start - Finish 2014-05-04 - 2019-03-08 Project owner Carr, Bill

Project location Client United Software

Quick navigation

Project	Resource management	Financial	Timesheets / Expenses
Dashboard	Booking planner	Budget	Time entries
Outline	Task assignments	Analysis	
Gantt		Pricing	Invoice
Worksheet		Billing	Charges
List		Recognition	Invoices

Inline-Editing in List Views

The Inline-Editing in List Views optional feature lets you edit records from within the list view.

This feature is currently available for the following views only:

- Administration > Global Settings > Organization > Projects
- Projects > Projects

Note: Standard fields for projects supporting inline-editing include Project, Customer, Project owner, Project stage, Transactional budget (hours), Project location, Cost center, Active, Notes, Is a portfolio project, Start date, Invoice layout, Authorizations approver, Project budgets approver, PO approver, Purchase request approver, Bookings approver, Revenue containers approver, Timesheets approver, Invoice approver, Expense reports approver, Project approver 1, Project approver 2, and Project approver 3.

Custom field types supporting inline-editing include Checkbox, Date, Dropdown, Pick list, Text, and Text area.

- Projects > Tasks
- Projects > Projects > [Select a project] > Project Center
- Reports > Saved Reports

Note: Currently, the only field for reports supporting inline-editing is Name.

Note: Contact your account administrators to check whether the Inline-Editing in List Views feature is enabled in your OpenAir configuration.

If the Inline-Editing feature is enabled and available for the list view you are working with, a label on top of the column headers indicates this is an editable list view.

Editable list view

- Double-click any editable cell to edit the field value straight from the list view, without having to leave the list view or open a record form.

Note: Inline-editing is available for all fields except Multiple Selection and File Attachment fields. Multiline text area fields are supported as of October 12, 2019.

Tip: Press Shift + Enter on your keyboard to insert a line break in a text area field. Drag the bottom right corner to resize the box

- Press the Tab key or Shift+Tab to go to the editable cell immediately to the right or immediately to the left, respectively. If you are editing the last editable cell to the right, press the Tab key to go to the first editable cell in the same row. If you are editing the first editable cell to the left, press Shift + Tab to go to the last editable cell in the same row.
- Click a different row to save the changes made, or press the Enter key to save the change, close the edit mode and move to the cell immediately below. An on-screen message confirms the record was saved or notifies you in case of error in the same way as when you click **Save** on the Task form.
- Form permissions and form rules are respected. If you are not able to modify a particular record or field on the record form, you will not be able to modify that record or field in the list view.
- Any form scripts associated with the record form will be triggered when editing a record directly from the list view.

1

2

List Views — Previous UI Version Layout



Note: This help topic describes how to work with list views that do not use the redesigned list view layout and functionality.

For a list of list views using the redesigned list view layout and functionality, see [Feature Changes in the Redesigned User Experience](#).

For information about the redesigned layout and functionality, see [List Views](#).

Some of the list views available in OpenAir do not currently use the redesigned list view layout and functionality. This help topic provides information about list views in the previous version of the OpenAir UI for reference.

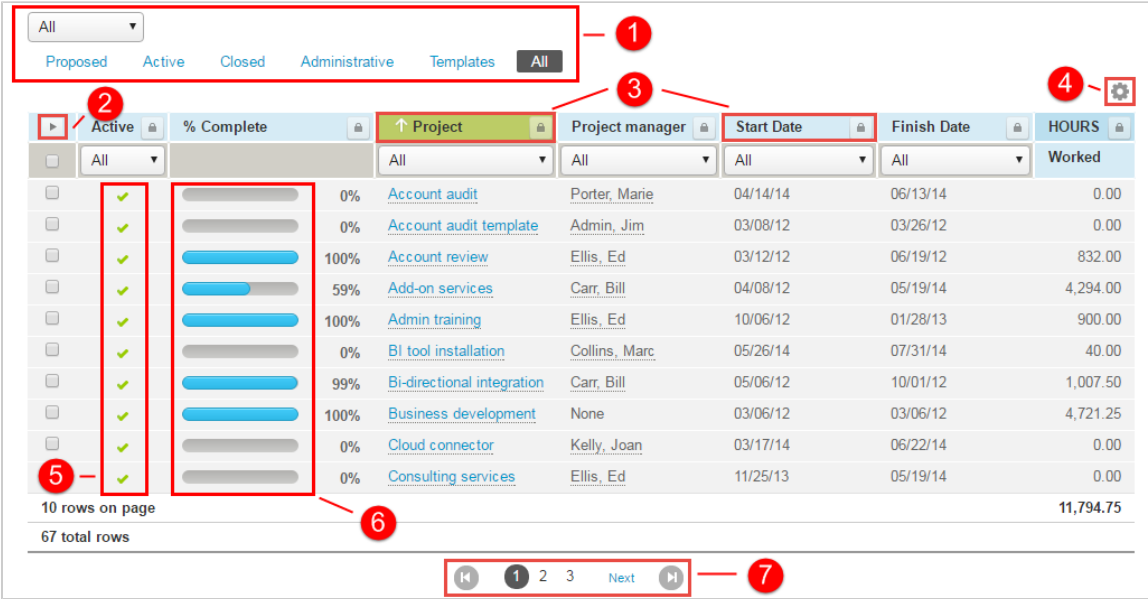





















1. Screen-specific navigation
2. Run bulk actions
3. Row Header colors
4. List Options combine visual display settings, content configuration and data export options. Selected rows, sorted and filtered columns are clearly highlighted in bright and positive colors. See [List Options](#) and [Density](#).



Note: The  icon is used for **Run bulk actions** and the Cog  icon is used for **List options**.

- 5. “Active” check mark — Identify your active items at a glance. See [Active Tick](#).
- 6. Progress bar — The progress bar gives a visual indication of progress status at a glance. See [Progress Bar](#)
- 7. Pagination — See [Pagination](#).

All

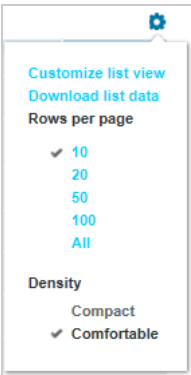
ProposedActiveClosedAdministrativeTemplatesAll

	Active	% Complete	Project	Project manager	Start Date	Finish Date	HOURS
	All		All	All	All	All	Worked
		<div><div></div></div>	0% Account audit	Porter, Marie	04/14/14	06/13/14	0.00
		<div><div></div></div>	0% Account audit template	Admin, Jim	03/08/12	03/26/12	0.00
		<div><div></div></div>	100% Account review	Ellis, Ed	03/12/12	06/19/12	832.00
		<div><div></div></div>	59% Add-on services	Carr, Bill	04/08/12	05/19/14	4,294.00
		<div><div></div></div>	100% Admin training	Ellis, Ed	10/06/12	01/28/13	900.00
		<div><div></div></div>	0% BI tool installation	Collins, Marc	05/26/14	07/31/14	40.00
		<div><div></div></div>	99% Bi-directional integration	Carr, Bill	05/06/12	10/01/12	1,007.50
		<div><div></div></div>	100% Business development	None	03/06/12	03/06/12	4,721.25
		<div><div></div></div>	0% Cloud connector	Kelly, Joan	03/17/14	06/22/14	0.00
		<div><div></div></div>	0% Consulting services	Ellis, Ed	11/25/13	05/19/14	0.00
10 rows on page							11,794.75
67 total rows							

123Next

List Options

The List options button pulls together the previous **List Menu** and **Rows per page** features and has been moved to a more prominent position.



Customize list view

Download list data

Rows per page

✓

10

20

50

100

All

Density

Compact

✓ Comfortable

Density

List Views

Project	Project manager	% Complete	Start Date	Finish Date
WASP	Carr, Bill	0%	05/29/13	05/29/13
Upsell account audit	Carr, Bill	0%	04/01/13	05/08/13
Two-day consulting	Collins, Marc	100%	10/07/11	11/07/11
Time off	None	100%	06/07/11	06/07/11
System upgrade	Kelly, Joan	100%	06/09/11	07/22/11
System reconfiguration	Porter, Marie	100%	06/06/11	10/26/11

Project	Project manager	% Complete	Start Date	Finish Date
WASP	Carr, Bill	0%	05/29/13	05/29/13
Upsell account audit	Carr, Bill	0%	04/01/13	05/08/13
Two-day consulting	Collins, Marc	100%	10/07/11	11/07/11
Time off	None	100%	06/07/11	06/07/11
System upgrade	Kelly, Joan	100%	06/09/11	07/22/11
System reconfiguration	Porter, Marie	100%	06/06/11	10/26/11
System integration template	Admin, Jim	0%	06/09/11	07/05/11
SRP deployment	Porter, Marie	0%	02/25/13	03/29/13
Software implementation	Horton, Dave	0%	02/18/13	09/12/13
Quick project template	Admin, Jim	0%	06/09/11	06/21/11

Select comfortable or compact from the List Options menu to control the density of the data displayed in list views. In compact mode the margins are trimmed and headings wrap to make more data visible.

Timesheets

Time type	Client : Project	Task	Service	Hours remaining	System estimate (hrs)
Billable	Cooper Software	Select...			
Non-billable	Cooper Software	Select...			
Billable	Cooper Software	Select...			
Billable	Altima Technology : ERP deployment	Select...			
Non-billable	Cooper Software	Select...			
Billable	Cooper Software	Select...			
Total					

Time type	Client : Project	Task	Service
Billable	Cooper Software	Select...	Consulting
Non-billable	Cooper Software	Select...	Consulting
Billable	Cooper Software	Select...	Consulting
Billable	Altima Technology : ERP deployment	Select...	Consulting
Non-billable	Cooper Software	Select...	Consulting
Billable	Cooper Software	Select...	Consulting
Total			

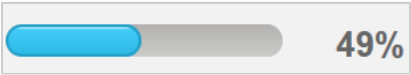
Timesheet grid density is set from User Center > Personal Settings > Display Options > Data Density > Control the data density displayed in timesheet grid with selected mode.

Active Tick

The Active tick provides a clear positive indication of an active item.

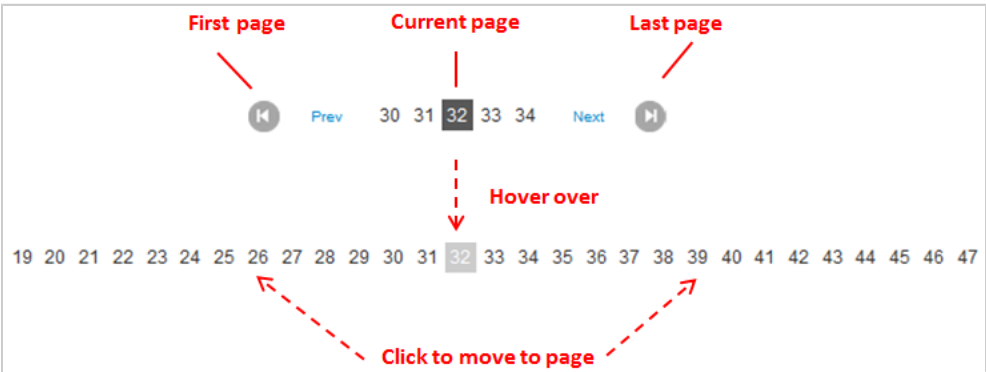
Progress Bar

The Progress bar combines a quick visual indication of completed status together with the numerical value.



Pagination

The Pagination control is provided in the [List Views — Previous UI Version Layout](#) to allow you to quickly move to the item you need regardless of the size of the list.



From the control you can clearly see your position in the list and move through the pages. Hover your mouse over the control and click to jump to a specific page.

Records

Through records, you keep track of all the information from your OpenAir account. You can have records of your employees, customers, projects , tasks, timesheets, receipts, expense reports, charges, invoices and so on. Different views and tools are available for some record types. These views may include information about records of different types which relate directly to the record you are viewing . For example, the information associated with an Expense Report record will typically comprise several Receipt records, Similarly, a Project record will include all Task and Issue records associated with that project. Other views may offer a functionality associated with that type of record.

1	<p>The record header gives information about the record you are currently viewing and, where applicable, lets you navigate the different views and tools available for that record type. See Record Header.</p> <div><p>Note: Not all record types use the redesigned header layout and functionality currently. For information about record types and pages using the redesigned header layout and functionality see Feature Changes in the Redesigned User Experience.</p></div>
2	<p>The canvas shows information about the record you are viewing. Record information may be displayed in different formats depending on the type of information you are viewing. The main three formats are forms, list views and grids.</p> <ul style="list-style-type: none">Entity forms let you view and modify information about the record you are viewing. See Forms.

- In-record list views provide information about items associated with the record you are viewing and let you navigate to these item records. For more information about list views, see [List Views](#).



Note: Not all in-record list views use the redesigned list view layout and functionality currently. For information about list views using the redesigned list view layout and functionality see [Feature Changes in the Redesigned User Experience](#).

- Grids let you view and enter information about multiple items over and across a date range on the same page. See [Grids](#).

Project: **Hardware implementation** | Client: Zibura Technologies

Project status: **ON TRACK** Project progress: **50%**

Message Board Project Center **Issues** Phases/Tasks Personnel More

Open On Hold Resolved **All** Untitled

Actions	Synopsis	Issue #	Priority	Entered by	Assigned to	Date	Date resoluti...	Date resoluti...	Date resolved	Stage
	Client not responding to e...	IS-20	50	Porter, Marie		15-Jun-10	15-Jun-23	15-Jun-19		On hold
	Need more resources	IS-2	50	Porter, Marie	Davis, Judy	15-Jan-19	15-Jan-31	15-Jan-26		On hold

Record Header

The record header displays in the screen-specific header section of the top bar when you are viewing a record. Depending on the record you are viewing it may include the following features:

- 1 The **record title and sub-title** remind which record you are viewing. For example if you are viewing a Project record, the title and sub-title will be the Project name and the Customer name, respectively.
- 2 The **in-record navigation menu** lets you navigate between the different views and tools available for the type of record you are viewing, when applicable. See [In-Record Navigation](#).
- 3 Click the back arrow in the top left corner to **go to the list view** for items of the same type as the record you are currently viewing.

Note: This button does not take you back to the list view you were viewing before navigating to the record. For example, if you navigated to a Project record using a quick navigation link in a QuickView within the Bookings list view, clicking the back arrow will take you to the Projects list view and not the Bookings list view.
- 4 A **record information panel** gives you access to information about your record at a glance and lets navigate quickly to related assets. See [Record Information Panel](#).

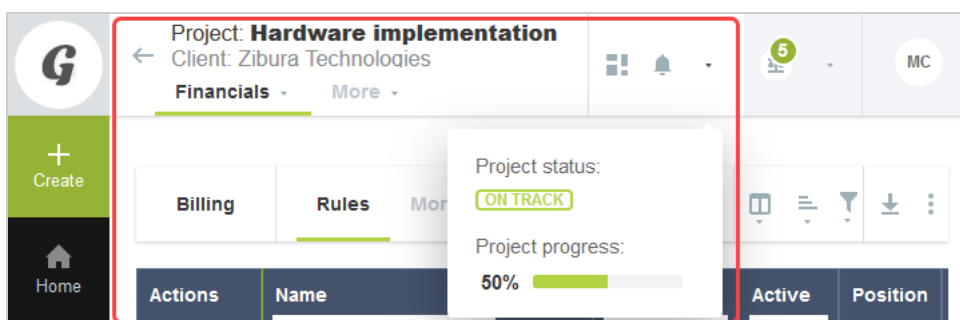
Project: **Hardware implementation** | Client: Zibura Technologies

Message Board Project Center **Issues** Phases/Tasks Personnel More

Project status: **ON TRACK** Project progress: **50%**

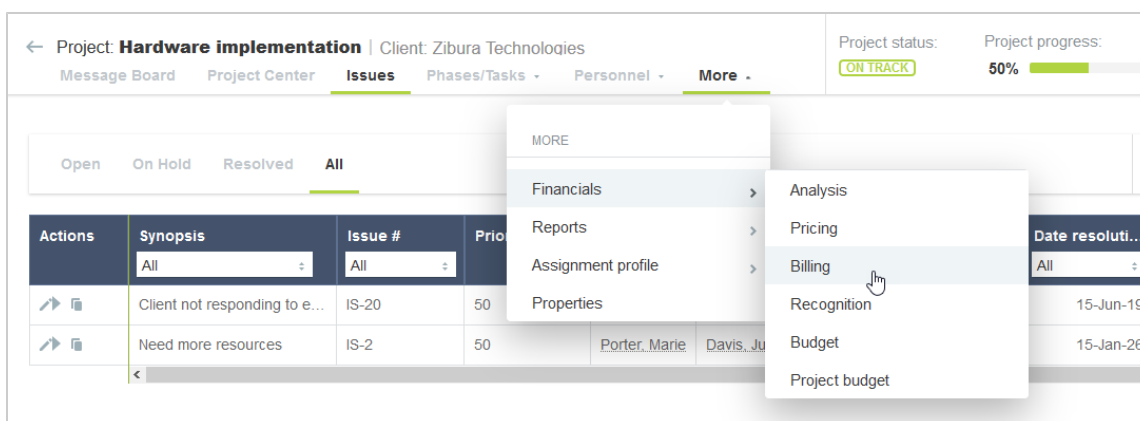
Note: The redesigned record header is currently available only for the following record types: Bookings, Customers, Envelopes/Expense reports, Guests, Invoices, Projects, Resources, Timesheets, Users/Employees. See [Feature Changes in the Redesigned User Experience](#).

Screen headers adjust to smaller screens to ensure that title, tab navigation, record information and utility icons are either visible or accessible.






In-Record Navigation

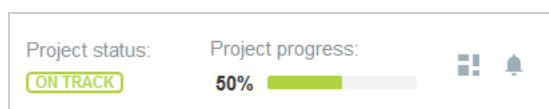
The in-record navigation menu lets you navigate between the different views and tools available for the type of record you are viewing. The in-record navigation menu is fully responsive and adapts well when viewing the record on tablets or small screens. If there is not sufficient space to display all menu options in the in-record navigation panel, click **More** to display a vertical continuation menu.



Record Information Panel

The record information panel includes more information about the record you are viewing and quick navigation links to related assets. For example:

- If you are viewing a project record, the information panel shows the project progress bar and project status and includes quick navigation links to any assets associated with the project. Such assets may include a project status summary report , a workspace , or the project status news feed . To view the asset, click the corresponding icon. You can also click the **Project status** tag to view the project status news feed.



- If you are viewing a resource request record, the information panel shows the request progress bar and the **Finalize request** button.



Forms

Forms let you view and modify the main information on each record.

Forms have a two-column layout, collapsible sections, and input fields.

- The form navigation panel let you navigate between form sections. This is particularly useful for complex records with long forms, such as Projects. The form section you are currently viewing is highlighted automatically as you scroll the form. See [Form Navigation](#).
- Form signposting helps you keep your bearings when navigating complex forms — See [Form Signposting](#).
- Action buttons are color-coded in the application. Green color buttons generally indicate saving changes you made. Blue color buttons perform in-page functions but do not save information. Cancel and Delete buttons are shown with a transparent background.
- Task progress bars or sliders show a visual representation of the current progress.

Note: If enabled in your account, the slider lets you set the progress.

- On-screen error messages help you locate and correct input errors — See [On-Screen Error Messages](#).
- In-form notifications help you find and resolve data entry issues — See [In-Form Notifications](#).
- In-form overlay popups r(recommended) or popup windows are used for additional data entry — See [In-Form Popups](#).

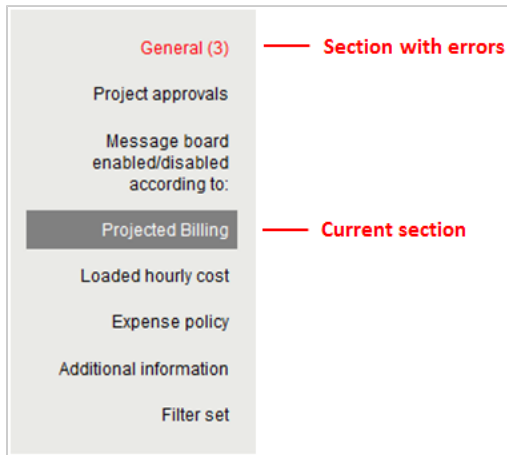
The screenshot shows a form interface with the following components:

- Form navigation:** A vertical panel on the left with sections: General (highlighted), Assignments, Hours remaining estimates, Other, Notifications, and Attachments.
- Action buttons:** 'Cancel' and 'SAVE' buttons at the top right.
- Progress slider:** A slider for 'Edit task Review SOW' showing '35% complete'.
- Form fields:** ID (3), Task name (Review SOW), Priority (5), Part of phase (2: Pre-kickoff), Project task type (Select...), Planned hours (10), Start date (MM/DD/YY), End date (MM/DD/YY), Cost center (Select...).
- Assignments table:**

Assigned to	Percent of user's time	Users planned hours	Divide hours	Primary loaded cost	Secondary loaded cost	Tertiary loaded cost
mpm	100	8	<input type="checkbox"/>			
Smith, James P.	100	2	<input type="checkbox"/>			
Select...	100		<input type="checkbox"/>			
Select...	100		<input type="checkbox"/>			

Form Navigation

Form navigation is a [Forms](#) control that allows you to quickly navigate around large forms.



Note: Form Navigation does not display if the form only includes a General section.

Form navigation features:

- **Section list** — The bar displays the list of sections the form is divided into.

Note: Clicking on a section will take you directly to the relevant part of the form.

- **Section indicator** — The section you are currently viewing is highlighted in gray.

Note: As you scroll through a form the Section indicator changes instantly.

- **Section errors** — If you attempt to save an incomplete form red text is used to indicate sections with errors together with a count of the number of errors.

Note: One missing field will be reported as more than one error if it breaks more than one rule. For example, not selecting a customer can generate the 'Required field' and 'Please select a customer' errors.

Form Signposting

Form signposting uses info tips and color highlighting to help you to keep your bearings when navigating complex forms.

General permissions

	Admin	Consultant	Project man...	Resource manager	Controller	Contractor
Disable the Delete button	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Disable the Save button	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Field settings

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

	Admin	Consultant	Project man...	Resource m...	Controller	Contractor
Project name	REQ	REQ	REQ	REQ	REQ	REQ
Client	REQ	REQ	REQ	REQ	REQ	REQ
Project manager						RO
Project stage						RO

The orange box in the above screenshot shows an info tip. An info tip is displayed when you hover your mouse over a control. This allows you to positively confirm the selection.

The blue boxes show the use of color to highlight the selections that have been made. This color coding makes it easier for you to verify that the correct settings have been made.

Note: For this release, form signposting has only been applied to the 'Modify the form permissions' screens.

On-Screen Error Messages

This form has 2 problems. Please fix them and try again.

New project

General (3)

Project approvals

Message board enabled/disabled according to:

Projected Billing

Loaded hourly cost

Expense policy

Additional information

Filter set

Cancel SAVE SAVE & CREATE ANOTHER

General

Project name ^{1*}

¹ Required field

Project manager

Start date (MM/DD/YY) ^{*} Budget (hours)

Budget (money)

Customer POs > Create

Notes

Client ^{23*}

² Required field ³ Please select a client.

Project stage

Currency

Cost center

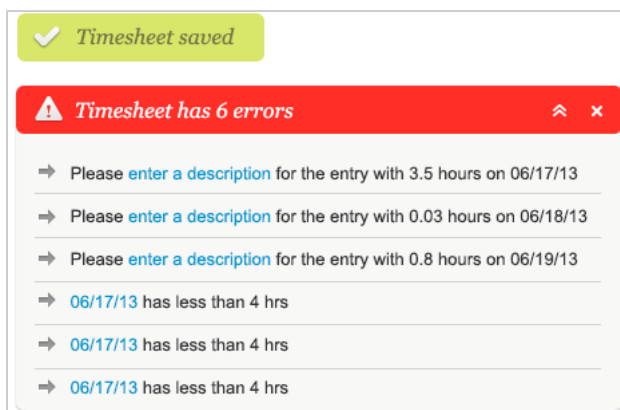
Associated workspace:

Create associated workspace duplicating the folder structure

The [Form Navigation](#) control and on-screen error messages help you quickly located and correct errors messages.

If problems are encountered, the form will automatically take you to the first error. The [Form Navigation](#) control shows you the number of errors in each section. The on-screen error messages explain how to correct the errors.

In-Form Notifications



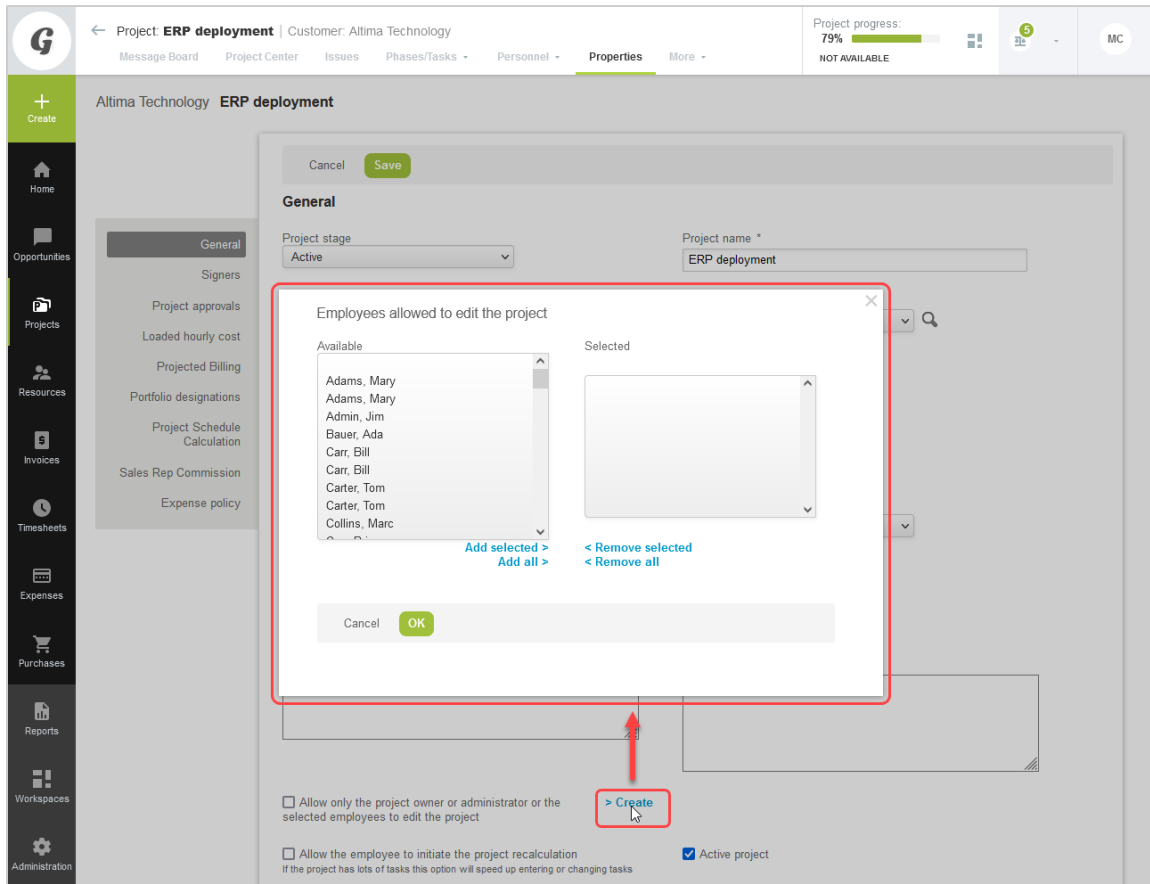
In-Form notifications provide clear feedback on user actions without the need for popup windows. They are particularly valuable for correcting data input errors. Errors are reported in a list with clickable links and instructions. Click on the links to be taken directly to the source of the error.

Note: For this release, in-form notifications are only available for the timesheet grid.

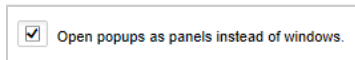
In-Form Popups

In-form popups have all the advantages of conventional popup windows, but appear as part of the form.

This allows you to block popup windows and still use all the OpenAir functionality.



The option is enabled from **Personal Settings > Display Options**.








Grids

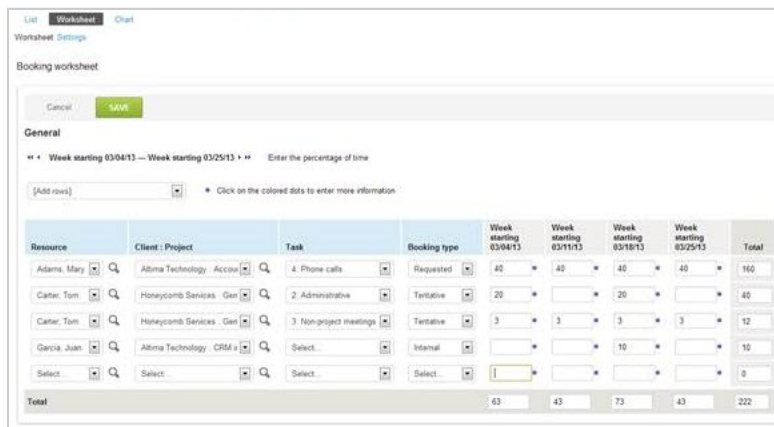
Timesheet grid

Time type		Customer : Project							Total (all days)	
Billable	AAA : Data Migration	7 Mon	8 Tue	9 Wed	10 Thu	11 Fri	12 Sat	13 Sun	12 (32)	
Billable	AAA : Hardware Implementati		4	4	3				11 (15)	
Billable	Acme Control : Test Proj Cen		2	2		8			12 (10)	
Non-billable	Fernhill Solutions : Account re		2		3				5 (9)	
Total		8	8	8	8	8			40	72

Timesheet grid features:

- **Pin** — Click the pin icon  to fix the calendar display on the right. After you pin the calendar, You can scroll vertically the information columns on the left without losing the calendar on the right.
- **Week browse** — Click to view the **Previous week** or **Next week**.
- **Delete row** — Click the Delete icon  and confirm the deletion to remove a row from the grid.
- **Duplicate row** — Click the Duplicate icon  to add a duplicate immediately below.
- **New row** — An empty row is always available at the bottom of the timesheet. When you start to fill out the empty row, a new empty row is added automatically.
- **Time entry information** — Click the Notes icon  to add information for a time entry. A green color Notes icon  indicates that there is additional information for the time entry
- **Resizing timesheet columns** — When this feature is enabled, drag the column edge to resize the column. OpenAir remembers the column size.

Classic grid



Worksheet Settings

Booking worksheet

Cancel Save

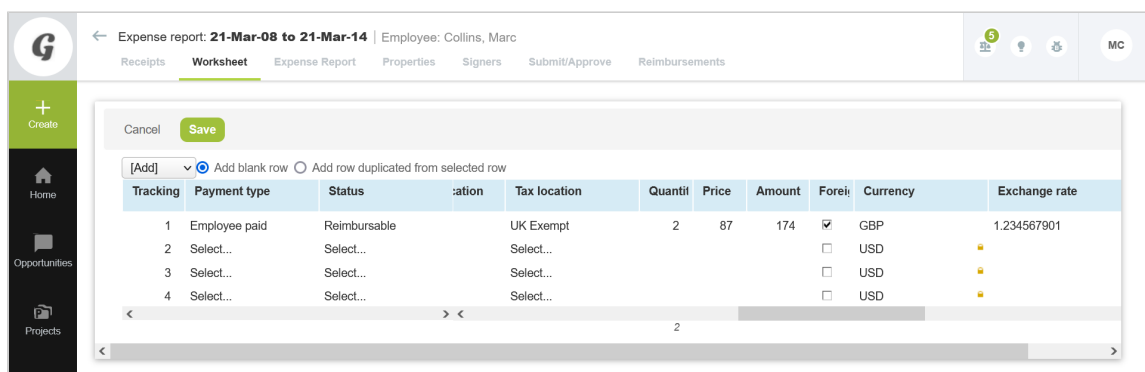
General

Week starting 03/04/13 — Week starting 03/25/13 Enter the percentage of time

[Add rows] Click on the colored dots to enter more information

Resource	Client : Project	Task	Booking type	Week starting 03/04/13	Week starting 03/11/13	Week starting 03/18/13	Week starting 03/25/13	Total
Adams, Mary	Adima Technology - Accov	4 Phone calls	Requested	40	40	40	40	160
Carter, Tom	Honeycomb Services - Gen	2 Administrative	Tentative	20	20	20	20	80
Carter, Tom	Honeycomb Services - Gen	3 Non-project meetings	Tentative	3	3	3	3	12
Garcia, Juan	Adima Technology - CRM	Select...	Internal			10		10
Select...	Select...	Select...	Select...	1				0
Total				63	43	73	43	222

Dynamic grid



Expense report: 21-Mar-08 to 21-Mar-14 Employee: Collins, Marc

Receipts Worksheet Expense Report Properties Signers Submit/Approve Reimbursements

Cancel Save

[Add] Add blank row Add row duplicated from selected row

Tracking	Payment type	Status	Location	Quantit	Price	Amount	Forei	Currency	Exchange rate
1	Employee paid	Reimbursable	UK Exempt	2	87	174	<input checked="" type="checkbox"/>	GBP	1.234567901
2	Select...	Select...	Select...				<input type="checkbox"/>	USD	
3	Select...	Select...	Select...				<input type="checkbox"/>	USD	
4	Select...	Select...	Select...				<input type="checkbox"/>	USD	

Working with the Project Center View

Note: The following optional features must be enabled to use the project center: Inline-Editing in List Views and Project Center.

You must have the “View Project Center” role permission to access the project center.

Contact your account administrators to check whether these features are enabled in your OpenAir configuration and to check your role permissions.

The Project Center optional feature aims to provide you with the tools to manage key project activities from a single screen.

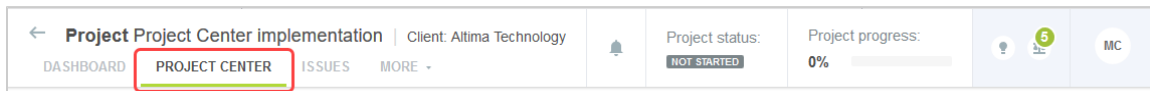
The Project Center lets you:

- Create and modify your project plans — See [Managing Project Plans in the Project Center](#).
- Create and manage resource bookings from within the project center — See [Managing Resource Bookings in the Project Center](#).
- Track hours worked in past periods and view the planned resource costs and time charges — [Viewing Hours, Time Costs, or Time Charges in the Project Center](#)

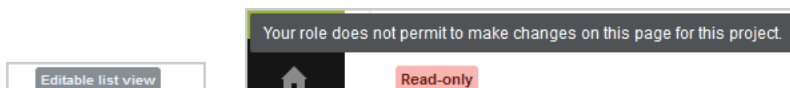
Account administrators control who can access the project center by role permission.

Account administrators control project center options for all OpenAir account users, including whether the project center show project sequence information only or project sequence information and resource booking information. See the help topic [Project Center Options](#).

To access the project center for a specific project, go to Projects > Projects > [Select a project] > Project Center.



The project center view looks similar to a list view and supports several list view features including inline-editing. A label above the column headers indicates whether the project center view is editable or read-only, depending on the access control settings for the project you are viewing and your permissions. For more information about inline-editing, see [Inline-Editing in List Views](#).



Note: Depending on your role, you may not be able to edit all information in the project center view even if the view itself is editable.

Form permissions and form rules are applied. Form scripts associated with the booking form will be triggered when updating a booking record directly from the project center.

The project center includes the following components:

- 1 Toolbar** — The project center toolbar includes the column selection and download tools available for list views throughout OpenAir as well as functionality specific to the project center view. See [Project Center Toolbar](#).

2	<p>Project outline — The project outline occupies only the left section of the canvas and shows your project sequence and, depending on the project center options configured for your account, resources booked to your project.</p> <ul style="list-style-type: none"> You can create and modify your project plans. You can add phases, tasks and milestones to your project and modify the project sequence. You can view, enter or update information about the phases, tasks and milestones in your project using inline-editing. You can set task and phase dependencies. You can choose the columns shown in the project outline. The first time you visit the project center, the project outline includes the following columns: Actions, Task, Start, Finish, Hours — Booked. Only the Actions and Task columns are required, all others are optional. You can include columns corresponding to standard and custom fields for task records (phases, tasks and milestones) and booking records. You can save the configuration in the same way as for list views. See Selecting List View Columns and Saving and Using Custom List View Configurations. Add resource bookings at the task level or at the project level. You can change the resources booked directly from the project center view. (Available only if project center options are set to show resource booking information) View, enter, or update resource booking information using inline-editing. (Available only if project center options are set to show resource booking information) Add built-in and custom fields for the booking entity as columns to the project outline. <p>Relationship lines show a clear overview of the project structure and relationships between phases, tasks, bookings and milestones in the project. You can expand and collapse each node in the project tree to show or hide all phases, tasks, bookings, and milestones nested under that node.</p> <p>The project schedule information (calculated task, phase and project Start dates and Finish dates, and Planned hours) is updated automatically when you make a relevant change in the project center. When the calculation is in progress, information in the Start, Finish and Planned hours columns cannot be edited and loading spinners are visible in the column headers. See Project Schedule Calculation in the Project Center.</p>
3	<p>Booking grid — The Project Center view shows a booking grid alongside the project outline. Depending on the selected granularity, the booking grid shows a week-by week or month-by-month schedule. Each column corresponds to a week or month and the column header shows the first day of the week or month. See Date Navigation in the Project Center. The number of columns in the grid depends on the size of your browser window. It is calculated automatically when you first load the screen or when you refresh it.</p> <ul style="list-style-type: none"> You can use the booking grid to enter the number of hours you want to book a resource for a given task (or at the project level) in a given week or month. You can copy multiple cell values using the copy and paste or fill handle functionality. You can use the date navigation panel in the toolbar to change the period shown in the booking grid. You can use the measure selector in the toolbar to switch between viewing hours, time costs or time charges in the booking grid. See Viewing Hours, Time Costs, or Time Charges in the Project Center. <p>Horizontal bars in the booking grid give a visual representation of the duration of the project, each phase and task based on the Start and Finish dates. Each bar is located at the top of the row and is color-coded: green color for the project, dark gray color for each phase, light gray color for each task.</p> <p>Availability indicators show the availability of the resource for each week as you make changes, and warning indicators show out of schedule bookings and potential overutilization of resources.</p>

Important: Review the following guidelines:

- The booking grid is available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).
- By default, the calculated task, phase and project **Start** dates and **Finish** dates, **Planned hours** and **% Complete** are calculated based on assignments and not on bookings. To base the calculation on bookings instead of assignments for a project, see [Basing Project Schedule Calculation on Bookings for a Project](#).
- The project center does not currently support booking approvals — You cannot submit bookings for approval, approve or reject bookings using the project center.

Project: CRM Integration | Client: Allima Technology


Project Center | Action Items | Phases/Tasks | Personnel | Financials | Reports | Assignment Profile | Properties

Project progress: 1%

12/14/22 | 11 | Job code, booking type* | DISCARD | Save

Next 12 weeks

Actions	Task	Booking type	Hours	Start	Finish	12/14/22	12/21/22	12/28/22	01/04/23	01/11/23	01/18/23	01/25/23	02/01/23	02/08/23	02/15/23	02/22/23	03/01/23	03/08/23
+	CRM Integration		1,823.28	04/13/15	04/21/23													
+	Davis, Judy	Submitted	4.00	03/16/15	03/16/15													
+	Project Manager	Tentative	980.00	02/23/15	09/12/15													
+	System integration		1,059.20	04/13/15	04/23/23													
+	Plan		432.80	01/02/23	03/04/23													
+	Review SOA		88.00	01/10/23	01/11/23													
+	Admin, Jim	Requested	94.00	10/01/21	09/30/23													
+	Cotline, Marc	Approved	34.00	09/20/15	07/10/15													
+	Discuss integration ...		244.00	01/02/23	01/08/23													
+	Analyst	Approved	244.00	02/23/15	07/10/15													
+	Finalize integration plan		0.00	01/10/23	01/16/23													
+	Define training plan		0.00	02/15/23	03/24/23													
+	Configure		8.00	01/09/23	03/14/23													
+	Configure integrations		0.00	01/20/23	03/02/23													
+	Document configurations		0.00	03/03/23	03/14/23													
+	Test & train		627.20	03/15/23	04/25/23													
+	Conduct integration ...		538.00	03/15/23	03/20/23													
+	Consultant	Tentative	538.00	02/23/15	07/10/15													
+	Integration ready for pr...		0.00	03/21/23	03/21/23													
+	Execute training		91.20	03/21/23	04/21/23													


Note: The following list view functionality is not available in the project center:

- Filtering and sorting options — The project center screen is designed to show the full project outline and all resource bookings in the project sequence.
- Rows per page — You can collapse and expand nodes in the project trees to show or hide phase, task, booking and milestone rows nested under the node. This functionality would not be supported with a limited number of rows per page.
- Column lock — The project center uses a fixed column lock to separate the project outline and the booking grid in the same view.
- Bulk actions — Not currently supported.


Lazy Loading

The project center screen uses lazy loading, or loading “on demand” to load only the data you see on the screen as you interact with the tool.

The project outline and the booking grid are loaded progressively. OpenAir loads only enough data to fit the available canvas space when you go to the project center. It then loads data as you scroll, as you expand or collapse nodes in your project tree, or as you change the period visible in the booking grid. This ensures a smooth experience when viewing or editing large project structures with a high number of bookings and achieves a good compromise between loading time and key project center functionality.

You can use the vertical scroll bar to go through all rows in the project center view even if the data is not loaded. This lets you scroll through the data of larger projects faster.

You can start your project where you left off with remembered vertical scrolling position, which is maintained when reloading the page or reopening a browser tab. This lets you go faster to any rows in the project center view, when working on large and complex projects.

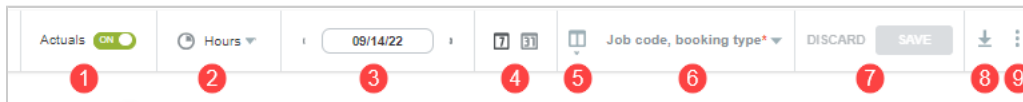

Note: The project center initially loads only the number of rows and columns that fit in your browser window. If you increase or decrease the size of the browser window, reload the page for optimum user experience.

Project Center Toolbar

The following table describes the main components of the project center toolbar.

1	<p>Actuals — Toggle the Actuals switch ON to view hours or time cost spent on the project thus far, or time charges already generated for billing. Toggle the switch OFF to view planned time, planned time cost, or time charge projections across the project lifespan. The Actuals switch works together with measure selector. For information about the values shown in the booking grid depending on both settings, see Viewing Hours, Time Costs, or Time Charges in the Project Center.</p> <p>This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options.</p>
2	<p>Measure selector — Select what values are shown in the booking grid. Depending on your account configuration and role permissions, you can view hours, primary, secondary and tertiary loaded costs, and time charges. See Viewing Hours, Time Costs, or Time Charges in the Project Center.</p>

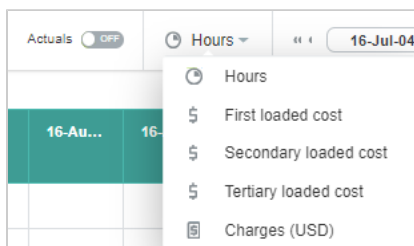
	This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options .
3	Navigation Panel — Control the period shown in the booking grid, use the navigation panel in the project center toolbar. See Date Navigation in the Project Center . This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options .
4	Booking Grid Granularity — Switch between weekly and monthly granularity in the booking grid and view a week-by-week or month-by-month schedule, use the date navigation panel in the project center toolbar. See Date Navigation in the Project Center . This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options .
5	Column Options — Select the columns you want to include in the booking grid and specify the column order, use the column options in the project center toolbar. See Project Center Column Options .
6	List configuration — Save and use list view configurations in the project center view in the same way as in list views. The list view configuration saves the selected columns and column order in the project outline part of the page (on the left). See Saving and Using Custom List View Configurations .
7	Save and Discard — Hours you add or update in the booking grid are not saved automatically. You need to save or discard any changes you make in the booking grid using the buttons in the toolbar. This functionality is available only if project center options are set to show resource booking information – See the help topic Project Center Options .
8	Download — Download your list view data in the project center toolbar. See Download Your List View Data .
9	List options — Control the information displayed in the booking grid, use the list options in the project center toolbar. See Project Center Display Options .



Viewing Hours, Time Costs, or Time Charges in the Project Center

Note: This functionality is available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).

Depending on your account configuration and role permissions, you can view hours, time costs based on the primary, secondary and tertiary loaded cost rates for each resource, and time charges. Select the information you want to view from the measure selector in the toolbar.



The time cost information is calculated based on current and historical loaded cost rates for each resource, including any overrides at the project or task level. If your company uses different loaded cost levels, you can view time cost information based on primary, secondary or tertiary loaded cost rates.


The following table describes the values that are shown depending on the measure selected and on the **Actuals** switch.


Measure selected	Actuals OFF	Actuals ON
Hours	Hours booked	<ul style="list-style-type: none"> For past weeks or months: [Read-only] Hours worked sourced from logged time entries against each task or against the project in open, submitted, approved and archived timesheets. For the current and future weeks or months: Hours booked. <p>See, Hours Worked in Past Weeks or Months (Actuals).</p>
Loaded costs (primary, secondary, or tertiary)	[Read-only] Hours booked × Resource loaded cost (primary, secondary, or tertiary)	[Read-only] <ul style="list-style-type: none"> For past weeks or months: Hours worked × Resource loaded cost (primary, secondary, or tertiary). Hours worked are sourced from logged time entries against each task or against the project in open, submitted, approved and archived timesheets. For the current and future weeks or months: Hours booked × Resource loaded cost (primary, secondary, or tertiary).
Charges	[Read-only] Time charge projections (based on time billing rules)	[Read-only] <ul style="list-style-type: none"> For past weeks or months: Time charges For the current and future weeks or months: Time charge projections (based on time billing rules)

Note: Monetary values are shown in the currency set for the project. Actions for booking rows in the Actions column are not available when viewing loaded costs or charges. Only users who can view loaded cost information can view cost information in the project center.

Actuals ON Charges (USD) 07/08/2023 1 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117 118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149 150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180 181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213 214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244 245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 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2019 2020 2021 2022 2023 2024 2025 2026 2027 2028 2029 2030 2031 2032 2033 2034 2035 2036 2037 2038 2039 2040 2041 2042 2043 2044 2045 2046 2047 2048 2049 2050 2051 2052 2053 2054 2055 2056 2057 2058 2059 2060 2061 2062 2063 2064 2065 2066 2067 2068 2069 2070 2071 2072 2073 2074 2075 2076 2077 2078 2079 2080 2081 2082 2083 2084 2085 2086 2087 2088 2089 2090 2091 2092 2093 2094 2095 2096 2097 2098 2099 2100 2101 2102 2103 2104 2105 2106 2107 2108 2109 2110 2111 2112 2113 2114 2115 2116 2117 2118 2119 2120 2121 2122 2123 2124 2125 2126 2127 2128 2129 2130 2131 2132 2133 2134 2135 2136 2137 2138 2139 2140 2141 2142 2143 2144 2145 2146 2147 2148 2149 2150 2151 2152 2153 2154 2155 2156 2157 2158 2159 2160 2161 2162 2163 2164 2165 2166 2167 2168 2169 2170 2171 2172 2173 2174 2175 2176 2177 2178 2179 2180 2181 2182 2183 2184 2185 2186 2187 2188 2189 2190 2191 2192 2193 2194 2195 2196 2197 2198 2199 2200 2201 2202 2203 2204 2205 2206 2207 2208 2209 2210 2211 2212 2213 2214 2215 2216 2217 2218 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To view hours worked or hours booked in the columns for past weeks or months, toggle the **Actuals** button in the toolbar.

- If the **Actuals** switch is **ON**, the project center shows:
 - Hours worked instead of hours booked in the booking grid columns for past weeks or months:
 - Hours worked values are sourced from logged time entries against each task or against the project in open, submitted, approved and archived timesheets.
 - Hours worked values cannot be modified.
 - The column header background color and the values for past weeks or months are dimmed.
 - If a resource is not booked to a task in the project but has logged time entries against this task, the project center shows a row for the resource with hours worked. The row has a red background color and an unbooked resource icon  next to the resource name.

	Admin, Jim					28.00
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- If the **Actuals** switch is **OFF**, the booking grid shows hours booked for past, current, and future weeks or months.

Summary																				
Task	Attachment_id	Internal id - report_id	Days	Hours	Predecessors	Hours														
			Start	End	Worked	EAC	ETC	10/16/13	10/23/13	10/30/13	11/06/13	11/13/13	11/20/13	11/27/13	12/04/13	12/11/13	12/18/13	12/25/13		
Custom web services			0.00	1,000.00		1,000.00	0.00	62.50	72.50	60.00	75.00	45.00	62.50	40.00	37.50	37.50	37.50	35.00		
[-] System integration			0.00	1,000.00		1,000.00	0.00	62.50	72.50	60.00	75.00	45.00	62.50	40.00	37.50	37.50	37.50	35.00		
[-] Plan			0.00	340.00		340.00	0.00	62.50	72.50	60.00	40.00									
[-] Review SOW			0.00	20.00		20.00	0.00													
 Horton, Dave																				
[-] Discuss integration points			0.00	140.00	3	140.00	0.00	62.50	12.50											
 Horton, Dave																				
 Quinn, Teddy								15.00	7.50											
 Vita, Sally								37.50	5.00											
[-] Finalize integration plan			0.00	160.00	4	160.00	0.00			60.00	60.00	40.00								
 Quinn, Teddy										30.00	30.00	20.00								
 Vita, Sally										30.00	30.00	20.00								
[-] Define training plan			0.00	20.00	14	20.00	0.00													
 Horton, Dave																				
[-] Configure			0.00	460.00		460.00	0.00				35.00	45.00	62.50	40.00	37.50	37.50	37.50	35.00		
[-] Configure integrations			0.00	300.00	5	300.00	0.00				35.00	45.00	62.50	40.00	37.50	37.50	37.50	35.00		
 Quinn, Teddy											17.50	22.50	15.00	37.50	37.50	37.50	37.50	35.00		
 Vita, Sally											17.50	22.50	37.50	2.50						
[-] Document configurations			0.00	80.00	13	80.00	0.00													



Date Navigation in the Project Center



Note: This functionality is available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).



The Project Center view shows a booking grid alongside the project outline. Each column corresponds to a week and the column header shows the first day of the week. The number of columns in the grid depends on the size of your browser window. It is calculated automatically when you first load the screen or when you refresh it.

You can use the date navigation panel in the toolbar to change the period shown in the booking grid.

- Click the Previous icon  or Next icon  to move the visible period backward or forward by one week or month.

- Click the Rewind icon « or Fast Forward icon » to move the visible period backward or forward by the number of weeks or months visible in the booking grid.
- Click the date in the center of the date navigation panel to select the starting date of the visible period.





- Click the Week icon  or Month icon  to switch between weekly and monthly granularity in the booking grid. Depending on the selected granularity, the booking grid shows a week-by-week or month-by-month schedule.

Review the following guidelines:

- When adding or changing hours in a booking grid cell, OpenAir creates a separate booking record for this booking grid cell. In a week-by-week schedule, bookings are created for each week. In a month-by-month schedule, bookings are created for each month.
- Switching between weekly and monthly granularity without adding or changing hours does not change the bookings.
 - Hours added in a month-by-month schedule are shown as distributed proportionally across all the full weeks and part weeks in that month when you switch to weekly granularity.
 - Hours added in a week-by-week schedule are summarized when you switch to monthly granularity. Hours for overlapping weeks (weeks overlapping across two consecutive months) are shown as distributed proportionally across both months.
- When changing hours for a booking spanning several booking grid cells (several weeks or months), OpenAir creates separate bookings for the cell you modified, the range of cells from the original booking immediately to the left of the cell you modified, and the range of cells from the original booking immediately to the right of the cell you modified.
- You should use the same granularity when adding and modifying booking hours for the same project. Adding hours in one granularity and modifying these hours in the other granularity may lead to unintended decimals and cell value overrides in you project schedules.

Project Center Column Options

You can add columns containing task and booking information in the project outline.

Click the Columns icon  in the list view panel or press  on your keyboard to display the **List view columns** fly out 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. Any column preferences applied to a list view continue to apply the next time you navigate to the same list view until you change them or switch to a different list view configuration. See also [Selecting List View Columns](#) and [Saving and Using Custom List View Configurations](#).

Some columns contain information both for the nodes in the project structure (project, phases, tasks and milestones) and for the bookings:

- The **Start** and **Finish** columns in the project outline show the start and finish dates for the booking row. For grouped booking rows, the **Start** column shows the earliest booking start date in the group and the **Finish** column shows the latest booking finish date in the group.
- The **Hours — Booked** column shows the total hours booked for each row. For grouped booking rows, the **Hours - Booked** column shows the total hours booked across all bookings in the group. The column also shows the total hours booked for each task, phase, and for the entire project. The value is updated automatically when you save changes in the booking grid.

Note: The Show Booked Hours on Lists feature must be enabled for your account to show the total hours booked at the project level.

There may be rounding discrepancies between the value shown in the **Hours - Booked** column and the sum of values shown in the booking grid.

- The **Hours - ETC — The Estimate to Complete (ETC)** column shows hours for each task, for each phase, and for the entire project. It is the total number of hours booked to the task, to all tasks in the phase, or to all tasks in the project and to the project, from the current week or month to the end of the project inclusive.
- The **Hours - EAC — The Estimate at Completion (EAC)** column shows hours for each task, for each phase, and for the entire project. It is the sum of the ETC and the total number of hours worked to the task, to all tasks in the phase, or to all tasks in the project and to the project, for all past weeks or months since the project start.

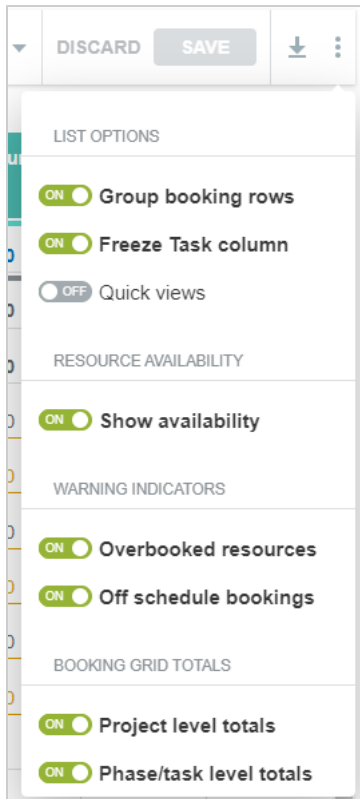
Note: The **Hours - ETC** and **Hours - EAC** values are calculated only when the **Actuals** switch is **ON**. See [Hours Worked in Past Weeks or Months \(Actuals\)](#).

Project Center Display Options

Note: All display option except QuickViews are available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).

You can use the list options to control the information displayed in the booking grid. The following display options are available:

- Group booking rows — Show bookings for the same resource, on the same task, and with the same booking type and job code on a single row or on separate rows. See [Group Booking Rows](#).
- Freeze Task Column — Keep the **Task** column always visible when you scroll horizontally in the project outline. See [Freeze Task Column](#).
- QuickViews — Pause or reinstate them in the context of the project center view. See [QuickViews](#).
- Show availability — Show or hide resource availability indicators — When shown, resource availability indicators are visible for the entire booking row when you select a cell. See [Resource Availability Indicators](#).
- Warning Indicators — Show or hide warning indicators for off-schedule bookings (bookings before or after the task date range) and potentially overbooked resources (booked hours making up 100% or more of working hours for the resource in a given week). See [Booking Warning Indicators](#).
- Booking grid totals — Show or hide total hours booked against each task, each phase, or the entire project. See [Booking Grid Totals](#).

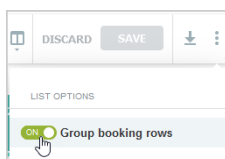


Group Booking Rows

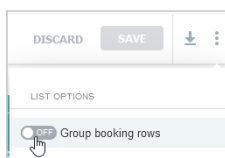
Bookings are nested under a task or at the project level. You can choose how bookings are displayed on the project center view. To change this display option, click the More icon in the toolbar, then toggle the **Group Booking Rows** switch under List options.

- If the **Group Booking Rows** switch is **ON**, bookings for the same resource, on the same task (or at the project level), and with the same booking type and job code, are grouped on a single row.
- If the **Group Booking Rows** switch is **OFF**, each booking appears on a different row even if all booking information is the same.

Note: When you add or edit a booking covering multiple weeks using the project center, a different booking is created for each week the resource is booked. If you create a booking outside of the project center covering multiple weeks, this booking always shows on a single line. If you modify the hours for this booking in the project center, there will be a different row for each week the resource is booked when the grouped display option is OFF.




				Consultant	Requested	72.00	21-Aug-30	21-Sep-12		32.00	40.00
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				Consultant	Requested	40.00	21-Sep-06	21-Sep-12			40.00
				Consultant	Requested	32.00	21-Aug-30	21-Sep-05		32.00	


Freeze Task Column

You can keep the Task column visible while you scroll horizontally in the project outline. This can be helpful as you the name of a phase, task, milestone and resource are visible while updating.

The **Freeze Task column** list option is enabled by default. To change this display option, click the More icon  in the toolbar, then toggle the **Freeze Task column** switch **OFF**.

QuickViews


QuickView for the record appears when you point to the name of the project, phase, task, milestone, or resource listed in the project center view. If QuickViews are enabled for your account and in your user settings, you can pause or reinstate them in the context of the project center view.

To change this display option, click the More icon  in the toolbar, then toggle the **Quick views** switch **OFF** and QuickViews are paused and do not appear.

Resource Availability Indicators

Resource availability indicators show the availability of the booked resource for each week as you make changes. This can be helpful to avoid overutilization.

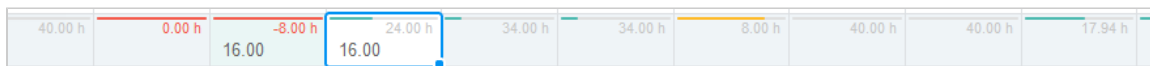
Note: Resource availability indicators show only when the booking grid shows Hours. See [Viewing Hours, Time Costs, or Time Charges in the Project Center](#).

To change this display option, click the More icon  in the toolbar, then toggle the **Show Availability** switch under Resource availability.

If the **Show Availability** switch is **ON**:

When you click a cell in the booking grid, all cells in the booking row show a visual indication of the resource's availability that week. The availability indicator shows the number of hours available for booking and a horizontal progress bar representing the proportion of the resource's working hours that are already booked that week. It is updated automatically as you make changes.


When you edit a cell value, the cell shows the availability indicator until you save your changes. This also serves as a visual reminder of the cells you updated since you last saved changes.



- The number of hours available is calculated as the employee's working hours less the hours the employee is booked for in that week.

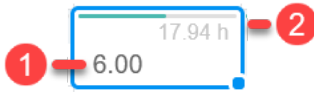
Hours Available = Working Hours – Booked Hours, where:

- Working Hours are based on the employee work schedule with any schedule exceptions and approved time off work deducted.
- Booked Hours is the sum of hours across all relevant bookings for that resource and that week. Bookings included in the calculation depend on your account configuration.

Note: Account administrators can configure which bookings are excluded from the available hours and booked hours calculation based on the **Booking type** and **Approval status**. All booking types and all approval statuses except "Rejected" are included by default. For more information, see  [OpenAir Administrator Guide](#).

Example:

If the resource works 40 hours in the week according to the work schedule, has 16.06 hours booked to other tasks this week, the resource has 23.94 available hours. If you book the resource for 6 hours to this task this week (1), the resource now has 17.94 available hours (2).



- The progress bar is color-coded. The color code depends on your account configuration.

Note: By default, the following color code is used:

- Gray color — No booked hours in that week.
- Green color — Booked hours make up less than 75% of working hours in that week.
- Orange color — Booked hours make up between 75% (included) and 100% (excluded) of working hours in that week.
- Red color — Booked hours make up 100% or more of working hours in that week. The available hours also appears

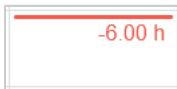
Account administrators can customize the color code to suit the business requirements of your company by defining utilization ranges and selecting a color for each utilization range. For more information, see [OpenAir Administrator Guide](#).

Booking Warning Indicators

Booking warning indicators show potential overutilization of resources in each week and out of schedule bookings.

Note: Booking warning indicators show only when the booking grid shows Hours. See [Viewing Hours, Time Costs, or Time Charges in the Project Center](#).


- Overbooked resources — Booked hours greater than or equal to a certain percentage of working hours. The resource availability indicator always shows in the cell if this percentage or more of the resource time is booked for the resource that week. The percentage of working hours (or utilization threshold) depends on your account configuration.



Note: Account administrators can set the utilization threshold for your OpenAir account. For more information, see [OpenAir Administrator Guide](#).

- Off-schedule bookings — The cell is highlighted with a red color outline and the hours show in red color if the booking is before the scheduled start time or after the scheduled end date for the task or project.



You can control each type of warning indicators using the list options. To change these display options, click the More icon  in the toolbar, then toggle the **Overbooked resources** or **Off-schedule bookings** switch under Warning indicators.

Booking Grid Totals



Booking grid totals show the total number of hours booked against each task, each phase and the entire project in the booking grid to get an overview of the planned effort.

- Project level totals — The booking grid is showing the total number of hours booked against the project and against all tasks across the entire project for each week or month.
- Phase/task-level totals — The booking grid is showing the following:
 - The total number of hours booked against each task for each week or month.
 - For each phase, the total number of hours booked against all tasks across the phase for each week or month.

Note: The totals shown in the booking grid are updated immediately after you add or change booking hours in the booking grid. Click **Save** in the toolbar to update the totals shown under the **Hours Planned** and **Hours Booked** columns in the project outline (left side of the project center view).

Managing Project Plans in the Project Center

You can create and modify your project plans directly in the project center.

1	Add new phases, tasks and milestones to your project plan without having to open a form. Click the Add New icon  in the Actions column next to a phase or a next to the project root to insert a new entry. The new entry will be nested immediately under the phase or the project root.
2	<p>Use inline-editing to enter or update the phase, task or milestone information. See Inline-Editing in List Views.</p> <p>You can distinguish set start and end dates from calculated dates. The fixed date icon  indicates a set start and end date for a task or milestone. You can modify set start and end dates using inline editing in the project center, if your role permissions allow it, but you cannot modify calculated dates. However, you can change calculated dates to set dates and conversely.</p> <p>To change a calculated start or end date to a set date, double-click the start or end date cell, clear the Calculated date box, then select the date. Conversely, to change a set start or end date to a calculated date, double-click the start or end date cell, then check the Calculated date box.</p>

Click a different row or press Enter to save the changes. A message appears confirming the record was saved.

Note: Form permissions and form rules are respected. Form scripts associated with the project phase, task or milestone form will be triggered when updating a record directly from the project center outline view.



Access control at the project level is also supported. For example, if the project can only be edited by the project owner or authorized users, the project center view is read-only for all other users unless the **Allow employees with appropriate permissions to add project based items when they do not have permission to modify the project** optional feature is enabled for your account and the user can edit project tasks. A label above the column headers indicates whether the project center is editable or read-only, depending on the access control settings for the project you are viewing and your permissions.

To change the sequence of your project, point to the row corresponding to the phase, task or milestone you want to move, then drag it to the required position. The mouse pointer changes to a closed hand cursor when you hold the mouse down.

When you drag the selected entry:


- (a) Point in between the rows. Notice a green line and an arrow appear in between the rows. Notice also the direction of the arrow.
 - If you point closer to the row above, the arrow starts in the row above . Release the mouse to **insert the selected entry after the row above**.
 - If you point closer to the row below, the arrow starts in the row below . Release the mouse to **insert the selected entry before the row below**.

3

Note: Inserting the selected entry after/before another entry is relevant when the nesting level of the two entries is different. For example, when inserting a task between a task nested under a phase and a milestone at the same level as the phase above, the inserted task will either be nested under the phase if inserted after the task above, or at the same level as the phase and the milestone if inserted before the milestone below.


- (b) Point to a phase row and release the mouse to **insert the selected entry into that phase**. Notice the background color of the entire row turns green as you point to a phase row.
- (c) Point to a task or milestone row. Notice the background color of the entire row turns gray as you point to a task or milestone row, indicating this is not a valid operation. If you release the mouse, the operation is cancelled and the sequence of your project is not changed.

4 Click the Edit icon in the Actions column to open the phase, task, or milestone property form.


Click the More icon  in the Actions column and select **Delete** to delete an entry. Any entries nested under the deleted entry will move up one level. For example, if you delete one of the main phases nested under the project root, all the sub-phases, tasks and milestones that were nested under that deleted phase will now be nested under the project root. A message appears confirming the record was deleted successfully.

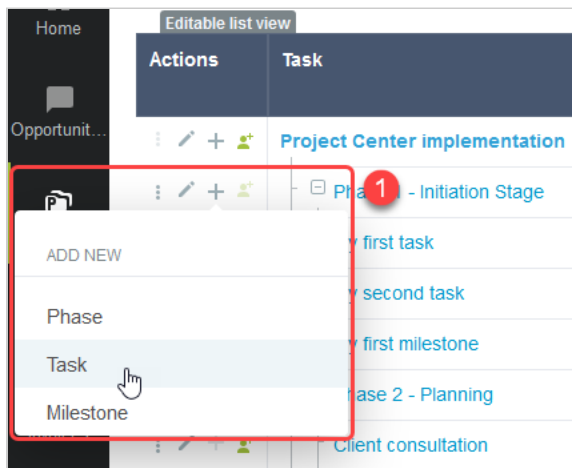
The project center lets you view and set dependencies between predecessor and successor phases or tasks.

- You can add the **Predecessors** column to the project outline section of the view.
- You can set predecessor tasks or phases for any task and phase in your project sequence. The functionality is similar to setting predecessors from the task entity form or the project outline, Gantt and task detail view. You set the relationship on the successor task or phase and select multiple tasks or phases that control the start or finish date of this task or phase (predecessors).

Click the More icon  in the Actions column and select **Edit predecessors** or click the cell in the **Predecessors** column to edit the predecessor settings for a task. The Predecessor settings popup window appears and shows any predecessors already set and a blank line, you can use to add a task or phase dependency.

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1. Select the name of the **Predecessor** task or phase. This is a task or phase that controls the start or finish date of the task or phase you are currently editing.
2. Select the **Type** of the relationship. The following options are available.
 - Finish-to-Start — The finish date of the predecessor task or phase controls the start date of the successor task.
 - Start-to-Start — The start date of the predecessor task or phase controls the start date of the successor task.
 - Finish-to-Finish — The finish date of the predecessor task or phase controls the finish date of the successor task.
 - Start-to-Finish — The start date of the predecessor task or phase controls the finish date of the successor task.
3. Enter the number of **Lag days**. This is the number of days you want to allow between the start or finish date of the successor task and the start or finish date of the predecessor. For example, If you define a Start-to Finish with 60 Lag days, the finish date of the successor task or phase should be 60 days after the start date of the predecessor task or phase.
4. After you set the **Predecessor**, **Type**, and **Lag days**, a new blank line appears.
5. To remove a dependency, click the delete icon .
6. Click **Save** to save your changes to the predecessor settings, or **Cancel** to discard your changes. The popup window closes and a confirmation message appears if you made any changes.



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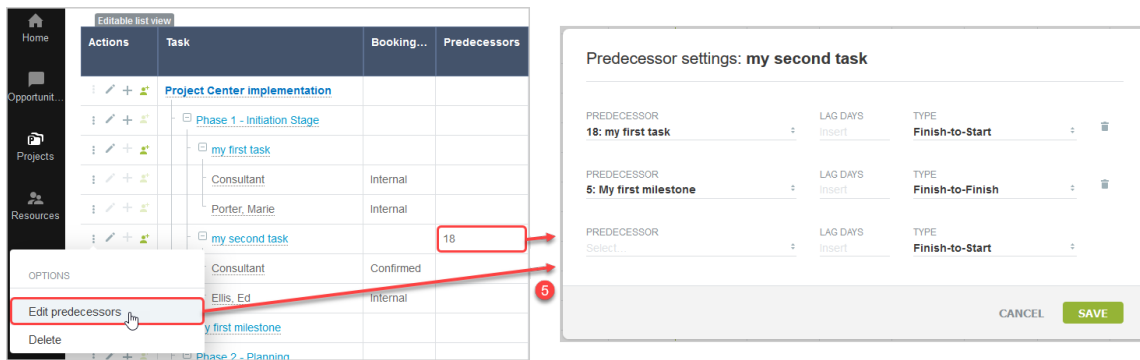
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				my second task	
				My first milestone	
Invoices					

OPTIONS
Edit predecessors
Delete



Managing Resource Bookings in the Project Center

Note: This functionality is available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).

You can view, create and manage resource bookings from the project center.

- For information about using the toolbar and managing columns, see [Project Center Toolbar](#).
- For information about other display options, see [Project Center Display Options](#).
- For information about adding bookings, see [Adding Resource Bookings to Your Project Plan](#).
- For information about modifying bookings, see [Modifying Resource Bookings in the Project Center](#).
- For information about adding multiple bookings and distributing hours across adjacent cells on the same booking row, see [Creating a Booking and Distributing Hours Over a Multiple Week Period](#).
- For information about copying or cutting values from the booking grid to the clipboard and pasting values from the clipboard to the booking grid, see [Copying, Cutting and Pasting Booking Row Cells](#).
- For information about copying values into adjacent cells, see [Copying Booking Row Cells Using the Fill Handle](#).
- For information about copying bookings along with other project information when creating a new project from an existing project, see [Copying Bookings with Projects](#).
- For information about deleting booking rows, see [Deleting a Booking Row in the Project Center](#).

General Guidelines



Review the following guidelines:

- Form permissions and form rules are applied. Form scripts associated with the booking form will be triggered when updating a booking record directly from the project center.
- The project center does not currently support the ability to open the properties form for a booking record directly from the project center view.

Tip: If the Quickviews for Projects, Tasks and Employees optional features are enabled for your account, point to the name of the project, task or employee, press Shift and click **All bookings** to view a list view of all bookings for this project, task or employee in a new browser tab.

- A label above the project center column headers indicates whether the project center is editable or read-only, depending on the access control settings for the project you are viewing and your permissions. Bookings cannot be added, deleted or updated if the project center view is read-only.

Note: If the project can only be edited by the project owner or authorized users, the project center view is read-only for all other users unless the **Allow employees with appropriate permissions to add project based items when they do not have permission to modify the project** optional feature is enabled for your account and the user can edit project tasks.


- Inline-editing for bookings in the project outline works the same way as for phases, tasks, and milestones.
- You can use inline-editing to edit the information shown in the project outline columns for a grouped booking row.
 - If you change any information in the grouped booking row, the information will be changed for all bookings in the group.
If any of the grouped bookings have some unique information other than Project, Task, Customer, Employee, Job code, or Booking type, and if the relevant column is included in the project outline, the corresponding cell shows empty.
 - Form scripts associated with the booking form are triggered for each booking record in the group. This may have a performance impact on the project center, depending on the number of bookings in the group and on how resource demanding the scripts are.
 - If one of the bookings in the group is not editable, the grouped booking row is not editable.
- You can change the selected resource to another named or generic resource for all bookings in a grouped booking row using the Change Resource icon . The booked resource will be changed for all bookings in the group.
- Modifying a cell in the booking grid is equivalent to deleting the resource booking for that resource and for that week, and creating a new resource booking to replace it. Instead of updating the existing booking, OpenAir marks the existing booking as deleted and creates a new booking with the new hours. Take this into consideration if you use the entrance function type parameter in form scripts to differentiate between newly created bookings and updated bookings. For more information about entrance function type parameters and OpenAir user scripting, see  [OpenAir User Scripting Guide](#).


Adding Resource Bookings to Your Project Plan

Note: This functionality is available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).
You can only add resources when viewing Hours in the booking grid and when the **Actuals** switch is toggled OFF. See [Viewing Hours, Time Costs, or Time Charges in the Project Center](#).

You can add resource bookings to your tasks and project without having to open a form.

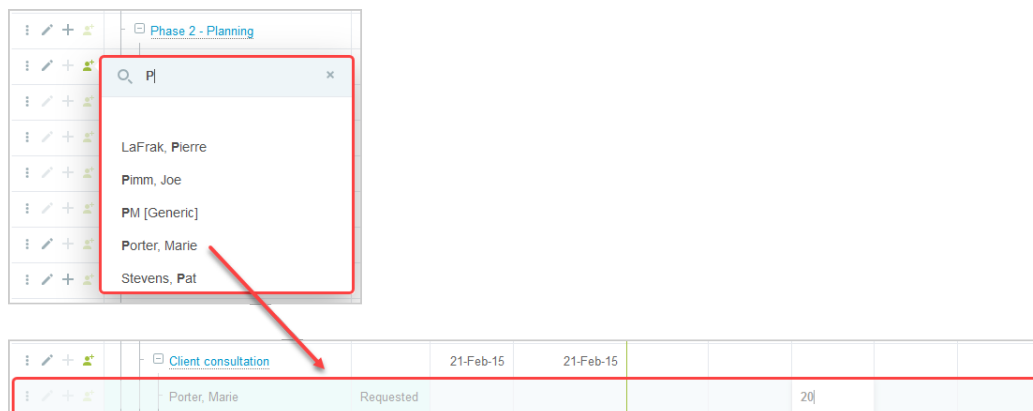
To add resource bookings to your project plan:

1. In the project center view, click the Add booking icon  in the Actions column next to a task or next to the project root to add a new resource booking. The new booking row will be nested immediately under the task or the project root.
2. Type a few characters in the search box to refine the list of resources, if required, and select a resource from the list of options.

Note: You can change the selected resource to another named or generic resource for all bookings in the row at any time. To do so, click the Change Resource icon  and select a new resource.

3. Use inline-editing to enter information for all required fields and any additional information for your booking in the relevant project outline columns.

4. Double click the cell on the booking row corresponding to the week you want to book the resource for, and type the number of hours you want to book the resource for in that week. Repeat for each week you want to book the resource for the task.



✓ **Tip:** Use Tab and Shift + Tab, or the right and left arrow keys to move to the next cell to the right or to the left of the cell you are currently editing.

You can use the **Add multiple bookings** action to fill multiple cells on the booking row covering a continuous period. See [Creating a Booking and Distributing Hours Over a Multiple Week Period](#).

You can copy or cut values from the booking grid to the clipboard and paste values from the clipboard to the booking grid. See [Copying, Cutting and Pasting Booking Row Cells](#).

You can copy a value into adjacent cells on the same booking row by dragging the fill handle to the left or right. See [Copying Booking Row Cells Using the Fill Handle](#).

5. Click **Save**. A message appears confirming the bookings were created successfully. Booking cells with errors preventing the save operation are outlined with a black border. Point to the outlined booking cell to show a tooltip describing the error.

You can also click **Discard** to cancel all changes made in the booking grid after you last saved it.

General Guidelines

The following guidelines apply when adding bookings in the project center view:

- A separate booking record is created for each booking grid cell containing hours. This enables you to distribute hours flexibly over multiple weeks and to include gaps if required.
- If you want to create a booking over a specified period with hours distributed evenly across all weeks in the booking period, you can:
 - Create a single booking using the Create button. The booking will show as a single row in the project center even when the **Grouped** display option is off. If you edit any hours in the booking grid, separate booking records will be created for each week in the period.
 - Create multiple contiguous bookings in the Project Center using the **Add multiple bookings** action. See [Creating a Booking and Distributing Hours Over a Multiple Week Period](#).
- If you add a new booking row, you must enter some hours for that booking before you can save it.
- You can add multiple booking rows before you add hours in the booking grid. However, you must add hours to all the booking rows before you can save your bookings. Note the **Save** button in the toolbar is disabled and shows in gray color if there are no hours in a booking row.
- Use inline-editing to enter additional information for your booking in the relevant project outline columns.

- You can create project templates complete with bookings then copy all bookings from your templates across to the new projects you create from these templates. Remember to choose the dates judiciously for your project and booking templates so they do not impact utilization or other reporting metrics. See [Copying Bookings with Projects](#)

Modifying Resource Bookings in the Project Center

Note: This functionality is available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).


You can modify resource bookings and resourced booked when viewing Hours in the booking grid and when the **Actuals** switch is toggled OFF.. See [Viewing Hours, Time Costs, or Time Charges in the Project Center](#).

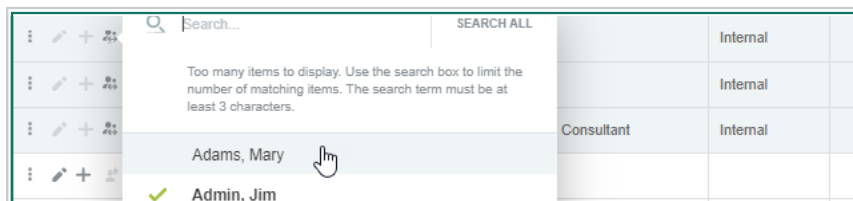
You can modify resource bookings using inline-editing in the booking grid and change the resource booked for all the bookings on a booking row.



Important: Modifying a cell in the booking grid is equivalent to deleting the resource booking for that resource and for that week, and creating a new resource booking to replace it. Instead of updating the existing booking, OpenAir marks the existing booking as deleted and creates a new booking with the new hours. Take this into consideration if you use the entrance function type parameter in form scripts to differentiate between newly created bookings and updated bookings. For more information about entrance function type parameters and OpenAir user scripting, see [OpenAir User Scripting Guide](#).

Review also the general guidelines for adding resource bookings — see [General Guidelines](#).

To modify resource bookings in the project center:

1. In the project center view, locate the booking row with bookings you want to change.
2. To change the resource for all the bookings on a booking row, click the Change Resource icon , then select a named resource or a generic resource from the dropdown list. You can use the search bar to refine the dropdown list as you type.



You can distinguish between a named resource or a generic resource with different icons. A solid resource icon  indicates a named resource, an outline resource icon  indicates a generic resource.

3. Double click the booking row cell you want to modify, and type the number of hours you want to book the resource for in that week. Repeat for each cell you want to modify.

Tip: Use Tab and Shift + Tab, or the right and left arrow keys to move to the next cell to the right or to the left of the cell you are currently editing.

You can use the **Add multiple bookings** action to fill multiple cells on the booking row covering a continuous period. See [Creating a Booking and Distributing Hours Over a Multiple Week Period](#).

You can copy or cut values from the booking grid to the clipboard and paste values from the clipboard to the booking grid. See [Copying, Cutting and Pasting Booking Row Cells](#).

You can copy a range of cells to adjacent cells horizontally or vertically. See [Copying Booking Row Cells Using the Fill Handle](#).

4. Click **Save**. A message appears confirming the bookings were created successfully. Booking cells with errors preventing the save operation are outlined with a black border. Point to the outlined booking cell to show a tooltip describing the error.

You can also click **Discard** to cancel all changes made in the booking grid after you last saved it.

Note: Modifying resource bookings is possible only when the booking grid measure shows Hours and the Actuals switch is OFF. See, [Hours Worked in Past Weeks or Months \(Actuals\)](#) and [Viewing Hours, Time Costs, or Time Charges in the Project Center](#).

Creating a Booking and Distributing Hours Over a Multiple Week Period


Note: This functionality is available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).

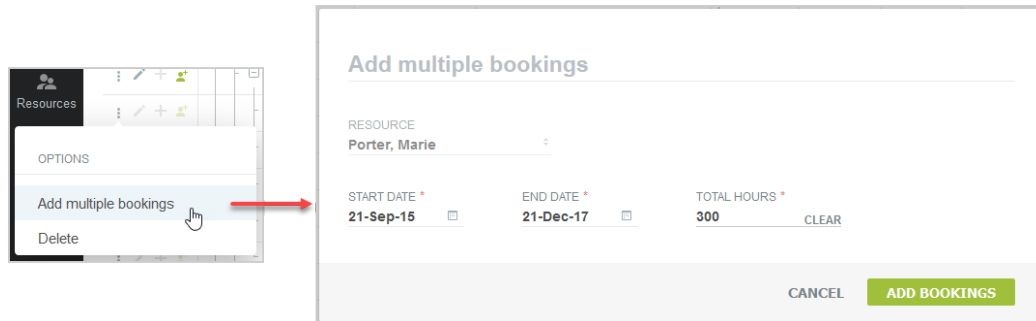
Adding multiple bookings is possible only when viewing Hours in the booking grid and when the **Actuals** switch is toggled OFF. See [Viewing Hours, Time Costs, or Time Charges in the Project Center](#).

To create a booking over a specified period with hours distributed evenly across all weeks in the booking period, you can do one of the following:

- Create a single booking using the Create button. The booking will show as a single row in the project center even when the **Grouped** display option is off. If you edit any hours in the booking grid, separate booking records will be created for each week in the period.
- Create multiple contiguous bookings in the Project Center using the **Add multiple bookings** action. You can use the following steps to fill multiple cells on the booking row covering a continuous period. This is equivalent to creating a booking using the **Create** button above the main navigation menu, except, in the project center it will create multiple contiguous bookings — one for each complete or part week — with the total number of hours distributed evenly over all weeks in the specified date range.

To create a booking and distribute hours over a multiple week period:

1. Add a resource booking row. See [Adding Resource Bookings to Your Project Plan](#).
2. Click the More icon  in the Actions column, then click **Add multiple bookings**. The Add multiple bookings dialog appears.



3. Select a **start date** for the booking period. The start date defaults to the first day of the first week shown in the booking grid.
4. Select an **end date** for the booking period. The period between the start date and end date must not be more than 52 weeks.
5. Enter the **total hours** to be booked over the entire period.
6. Click **Add bookings**. The booking grid shows the total number of hours distributed evenly over all weeks in the specified date range. The number of hours for each week is calculated in function of the number of days available in that week (if the end date falls part through the week, for example). This operation overrides any existing hours for weeks falling in the specified date range.

21-Sep-06	21-Sep-13	21-Sep-20	21-Sep-27	21-Oct-04	21-Oct-11	21-Oct-18
	13,24	22,06	22,06	22,06	22,06	22,06

Note: Adding multiple bookings is possible only when the booking grid measure shows Hours and the Actuals switch is OFF. See, [Hours Worked in Past Weeks or Months \(Actuals\)](#) and [Viewing Hours, Time Costs, or Time Charges in the Project Center](#).

Copying, Cutting and Pasting Booking Row Cells

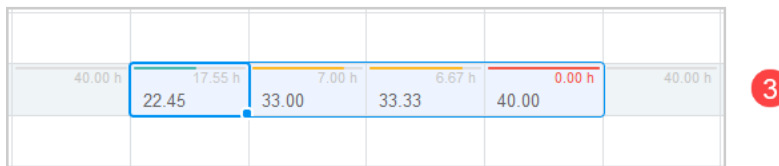
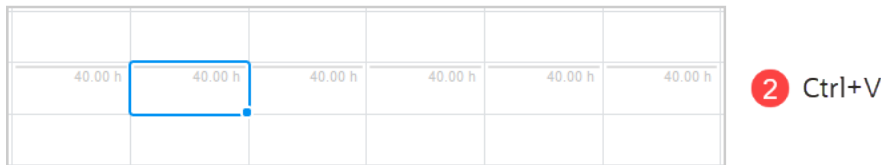
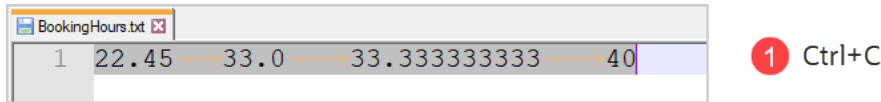
Note: This functionality is available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).

Copy or cut values from the project center booking grid (booked hours) to the clipboard and paste values from the clipboard to the booking grid.

- To copy cells to the clipboard, drag to select a range of adjacent cells and press Ctrl+C (Windows) or Cmd+C (macOS).
- To cut cells (copy to the clipboard and delete values when values are pasted), drag to select a range of adjacent cells and press Ctrl+X (Windows) or Cmd+X (macOS).
- To delete multiple cell values at the same time, drag to select a range of adjacent cells and press Delete.
- To paste the clipboard content into the booking grid, select the first cell of the destination range and press Ctrl+V (Windows) or Cmd+V (macOS).
- To clear the clipboard content after you copy or cut cells, press Esc. The cut values are not deleted until you paste them.

Note: You can also use keyboard keys to select a range of adjacent cells. To do so, select a cell, then use Shift + Arrow Keys to extend the selection range both horizontally and vertically.

The selected area is highlighted with a light blue color background and outlined with a thin blue solid line. When you cut or copy the selected area, the outline changes to a dotted line. When you paste the clipboard content, the destination range is highlighted with a light blue color background and outlined with a thin blue solid line.



Review the following guidelines:

- You can copy, cut and paste values across multiple adjacent rows and columns.
- You can only select adjacent booking rows for the same task, or select adjacent booking rows at the project level. It is not possible to copy, cut or paste booking rows across multiple tasks at the same time.
- When pasting into the booking grid:
 - You can paste up to 100 columns at the same time.
 - You can only paste into adjacent booking rows for the same task, or paste into adjacent booking rows at the project level. If the clipboard data contains more rows than the number of available booking rows, only the first rows of clipboard data are pasted into available booking rows, additional rows of data in the clipboard are ignored.
 - The selected cell or range indicates the top left corner of the destination range. If you select a range of cells smaller than the clipboard content, the clipboard content is copied into a destination range of up to 100 columns across and up to the number of available booking rows down. If you select a range of cells larger than the clipboard content and the clipboard content contains more than one value, the destination range is the same size as the clipboard content up to 100 columns across.
 - If the clipboard content contains only one value, the value is pasted into all cells in the selected destination range.
 - All existing values in the destination range are overwritten. If the source cell was empty, the destination cell is cleared.
 - You can paste numerical values copied from any application, including tab-separated numerical values copied from a text file.
 - The source values must be in the correct numerical format, either an integer or a decimal number with a dot for decimal separator — 26.75, for example. Pasting a cell value formatted as text or as

a number with a comma for decimal separator or thousands separator, for example, clears the destination range. This is independent on the number format in your personal settings.

- Changes in the booking grid are not saved automatically. To save the changes, click **Save**. To discard the changes, click **Discard**.

Copying Booking Row Cells Using the Fill Handle

Note: This functionality is available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).

You can copy a single value or multiple values into adjacent cells vertically or horizontally in the project center booking grid by dragging the fill handle to the left or right.

To copy booking row cell values to adjacent cells:

- Drag to select the cell or the range of cells you want to copy (source range).

Note: You can also use keyboard keys to select a range of adjacent cells. To do so, select a cell, then use Shift + Arrow Keys to extend the selection range both horizontally and vertically.

- Point to the fill handle on the bottom right corner of the selected range.
The cursor becomes a + sign.
- Drag the fill handle to the right, to the left, above, or below across the range of cells you want to fill (destination range).

The destination range is outlined with a blue dotted line.

- Release the mouse.

The destination range is filled automatically with the values of the copied cells. Any existing values in the destination range are overwritten. If the destination range is larger than the source range, the source range values are repeated as a pattern to fill the entire destination range.

Note: Changes in the booking grid are not saved automatically. To save the changes, click **Save**. To discard the changes, click **Discard**.

20.00 h	10.00 h	10.00 h	10.00 h	15.00 h	20.00 h	20.00 h	20.00 h	20.00 h
	10.00	10.00	5.00					
	19.00		19.00					
	5.00							

10.00 h	10.00 h	10.00 h	20.00 h	20.00 h	20.00 h	20.00 h	20.00 h
10.00	10.00	10.00					
19.00	19.00	18.50 h					
5.00	5.00	35.00 h					

10.00 h	10.00 h	20.00 h	20.00 h	20.00 h	20.00 h	20.00 h
10.00	10.00					
19.00		37.50 h				
5.00						

Copying Bookings with Projects

You can create project templates complete with bookings then copy all bookings from your templates across to the new projects you create from these templates.

The start date of each booking associated with the new project is relative to the project start date and determined based on the start date of the booking associated with the project template relative to the project start date in the template. This feature, in combination with the booking-driven project schedule calculation can save you time staffing your new projects in the project center view.

For more information about booking-driven project schedule calculation, see [Basing Project Schedule Calculation on Bookings for a Project](#).

Note: Choose the dates judiciously for your project and booking templates so they do not impact utilization or other reporting metrics.


To copy bookings when creating a new project from another project:

1. Click the Create button, then **Projects: Project, from another project**
The New Project form appears.
2. Enter or select all required information.
3. Select a project from the **Duplicate phases and tasks from this project** dropdown list.
4. Check the **Duplicate bookings** box.
5. Enter or select any additional information as required.
6. Click **Save**.

Deleting a Booking Row in the Project Center

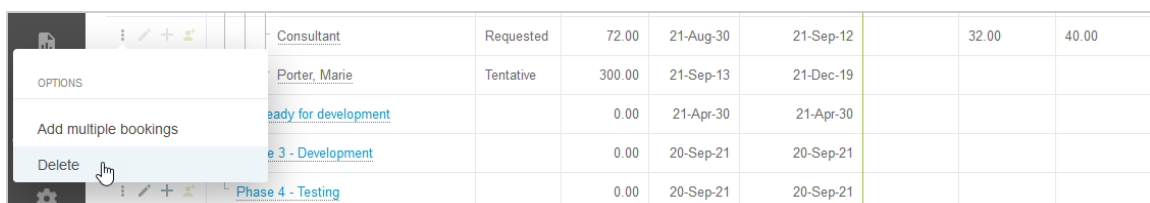
Note: This functionality is available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).

You can delete booking rows when viewing Hours in the booking grid and when the **Actuals** switch is toggled OFF. See [Viewing Hours, Time Costs, or Time Charges in the Project Center](#).

To delete a booking row, click the More icon  in the Actions column and select **Delete**. A message appears confirming the booking was deleted successfully.

All business rules are respected — you will not be able to delete a booking if your role does not permit it, or if the booking was either submitted for approval or approved.

All bookings in a grouped booking row will be deleted except if some of the bookings in the group cannot be deleted. If some of the bookings cannot be deleted, review each booking in the grouped booking row. Turn off the **Grouped** display option and try deleting each booking one by one.



Consultant	Requested	72.00	21-Aug-30	21-Sep-12		32.00	40.00
Porter, Marie	Tentative	300.00	21-Sep-13	21-Dec-19			
Ready for development		0.00	21-Apr-30	21-Apr-30			
Phase 3 - Development		0.00	20-Sep-21	20-Sep-21			
Phase 4 - Testing		0.00	20-Sep-21	20-Sep-21			

Note: Deleting a booking row is possible only when the booking grid measure shows Hours and the Actuals switch is OFF. See, [Hours Worked in Past Weeks or Months \(Actuals\)](#) and [Viewing Hours, Time Costs, or Time Charges in the Project Center](#).

Project Schedule Calculation in the Project Center

The project schedule is recalculated automatically after:

- You modify the **Start** date or **Finish** date for a task.
- You drag a task into a phase and the task modifies the **Start** date or **Finish** date for the phase.
- You add or modify one or more predecessors to a task or phase.
- You add or modify **Planned hours**, if the project schedule calculation is based on assignments (default).
- You add or modify hours in the booking grid and click **Save**, if the project schedule calculation is based on bookings. For more information about calculating the project schedule based on bookings instead of assignments, see [Basing Project Schedule Calculation on Bookings for a Project](#).

When you go to the project center or reload the project center page, OpenAir checks if any changes impacting the project schedule were made outside of the project center and triggers the project schedule calculation if needed.

All calculated **Start** dates and **Finish** dates in the project sequence are updated. **Planned hours** are also updated if the project schedule calculation is based on bookings.

Note: You can set individual projects to calculate the following information based on bookings instead of assignments:

- Calculated task, phase and project **Start** dates and **Finish** dates.
- **Planned hours**.
- **% Complete**.

For more information, see [Basing Project Schedule Calculation on Bookings for a Project](#).

When the calculation is in progress, information in the **Start**, **Finish** and **Planned hours** columns cannot be edited and loading spinners are visible in the column headers.

Basing Project Schedule Calculation on Bookings for a Project

You can set individual projects to use bookings instead of assignments for project schedule calculation.

If the project schedule calculation is based on bookings instead of assignments:

- All calculated **Start** dates and **Finish** dates are updated based on bookings
 - If the task has no predecessor tasks or phases:
 - The task **Start** date is the project **Start** date.

- The task **Finish** date is the latest booking end date out of all bookings to the task.
- If the task has one or more Finish-to-Start or Start-to-Start predecessor tasks:
 - The task **Start** date is calculated based on all dependencies (the latest date to meet all the dependencies).
 - The task **Finish** date is the latest booking end date out of all bookings to the task, or the **Start** date + 1 day, whichever is the latest.
- If the task has one or more Finish-to-Finish or Start-to-Finish predecessor tasks:
 - The task **Finish** date is calculated based on all dependencies (the latest date to meet all the dependencies).
 - The task **Start** date is the earliest booking start date out of all bookings to the task, or the project **Start** date if it is later than the earliest booking start date.



Note: All task fixed **Start** dates and fixed **End** dates remain unchanged.

The earliest **Start** date for a task is always the project start date. You cannot set an earlier fixed **Start** date for a task.

- **Planned hours** are calculated based on bookings, instead of being set at the task level or calculated from task assignments. It is the sum of all hours booked to the task, phase or project. The **Planned hours** field on the task entity form is read-only when schedule calculation for the associated project is based on bookings.
- **% Complete** is calculated based on bookings. For tasks, **% Complete** indicates the amount of work completed on the task (from approved time entries) compared to **Planned hours** (sum of all hours booked to the task).



Important: Review the following guidelines:

- Only the calculated **Start** dates, calculated **Finish** dates, **Planned hours**, and **% Complete** are calculated based on bookings instead of assignments.
- Using bookings instead of assignments for project schedule calculation may impact other functionality that are based on assignments. Test extensively on a sandbox account and consider the impact carefully before you start using this feature on a production account.
Examples of functionality that may have a dependency on assignments:
 - Charge projections based on assigned hours.
 - Earned value management (EVM) metrics.
 - Billing rule rate override at the assignment level.
 - Planned/assigned hours adjustment based on approved hours.
 - Pending bookings from task assignments.
 - Any user scripts or integrations with dependency on assignments.

To base project schedule calculation on bookings for a project:

1. Create the project_plan_based_on_bookings custom field.
 - a. Go to Administration > Global Settings > Custom Fields.
 - b. Click the Create button, then click **New Custom field**.

A form appears.

- c. Select *Project* from the **Add a custom field to** dropdown list (under Global).
- d. Select *Checkbox* from the **Type of field to add** dropdown list.
- e. Click **Continue**.

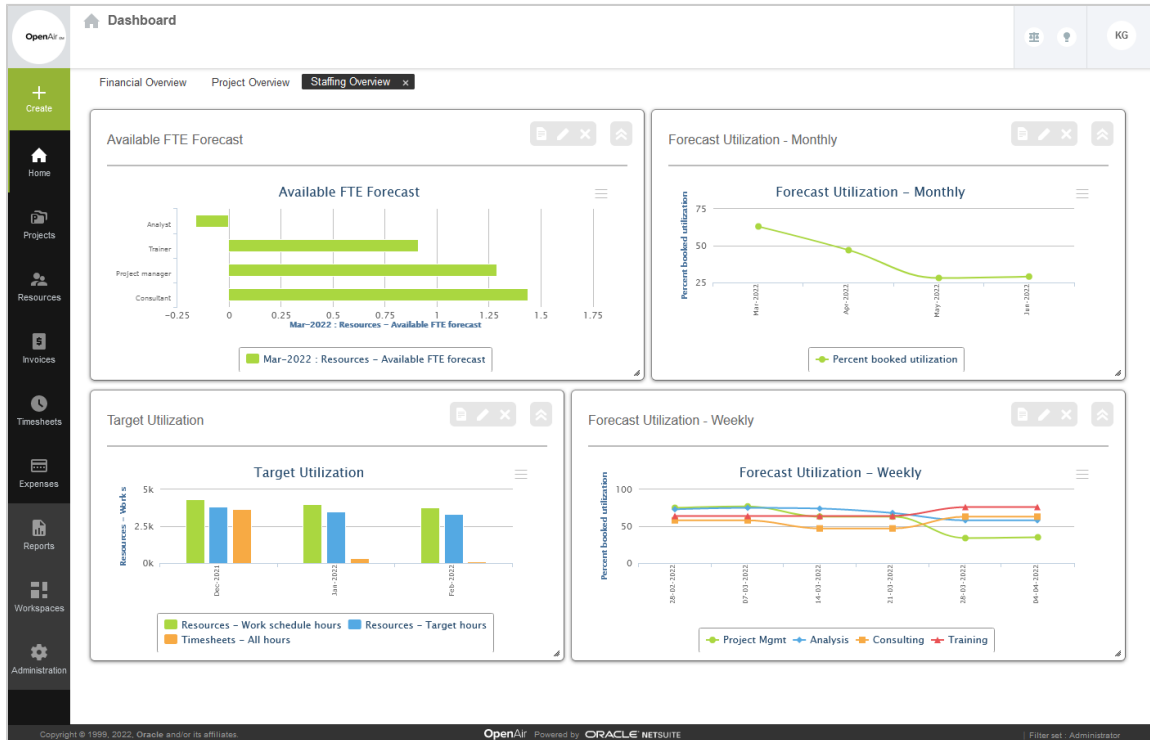
Another form appears.

- f. Enter the **Field name** — This must be exactly `project_plan_based_on_bookings`.
 - g. Check the **Active** box.
 - h. Enter a **Display name** — For example, Calculate project schedule based on bookings.
 - i. Click **Save**.
- 2. Go to Projects > Projects > [*Select a project*] > Properties.
 - 3. Check the **Calculate project schedule based on bookings** box.
 - 4. Click **Save**

Working with Dashboards and Calendars

Home / Dashboard

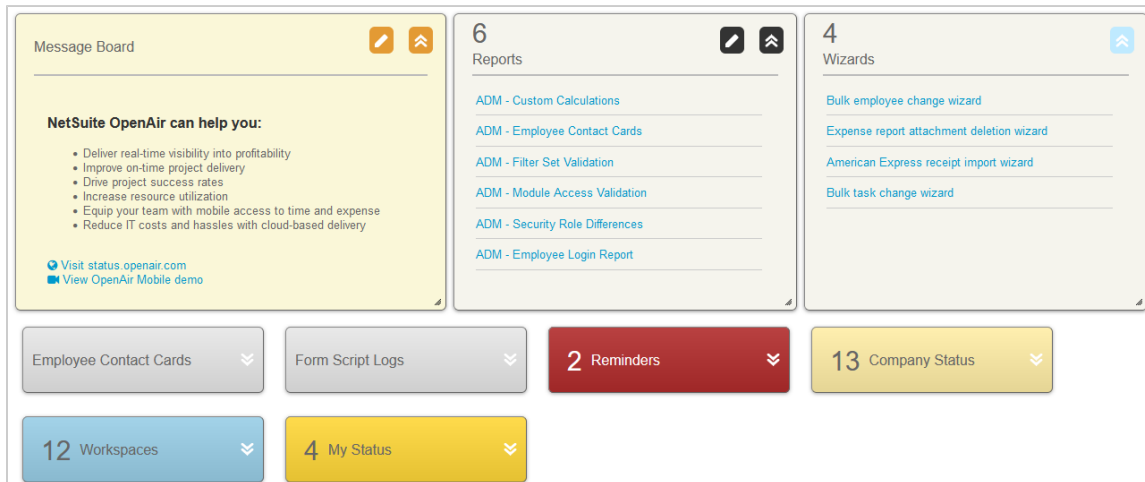
The content of the home page and dashboard is organized into portlets that can be collapsed, expanded, resized, and moved. Portlets are screen width responsive.



This example shows three chart portlets. You can interact with the charts, e.g. hiding a series by clicking on the legend or hovering over a point to display detailed information in a tooltip. You can also download the chart as an image.

Portlet

The Home and Dashboard screens are organized as a set of portlets. Each portlet type is color coded and can be moved and resized according to your needs. You will find all of the familiar OpenAir Dashboard functionality encapsulated within these portlets.



Portlet features:

- Portlets have a title that displays in the center when the portlet is collapsed and at the top when the portlet is expanded.

Note: When collapsed the number of items in the portlet is displayed on the left.

- Portlets can be moved by dragging the portlet title. To keep a pleasing appearance, portlets automatically align to a grid.

Note: The Message Board portlet is always shown first and cannot be moved from the top left position on the Dashboard.

- Portlets can be collapsed or expanded by clicking on the / Icons or by single clicking on the portlet title.
- When expanded, portlets have action buttons displayed in the top right depending on the portlet type. An action hint is displayed if you hover your mouse over the button.

If the content does not fit within the portlet area, then the content will either automatically resize or scrollbars will be displayed. Portlets with a icon can be edited to display different information. For portlets which display information from a report, you can open the report from the portlet by clicking the icon. You can delete a portlet by clicking the icon.

Important: The maximum number of rows that report portlet can display is limited for performance reasons. The limit depends on your OpenAir account configuration. We recommend that you use filters to reduce the report size so all data show on the portlet.

Chart

Colorful and interactive graphs create offer a productive and in-depth way to work with performance metrics.

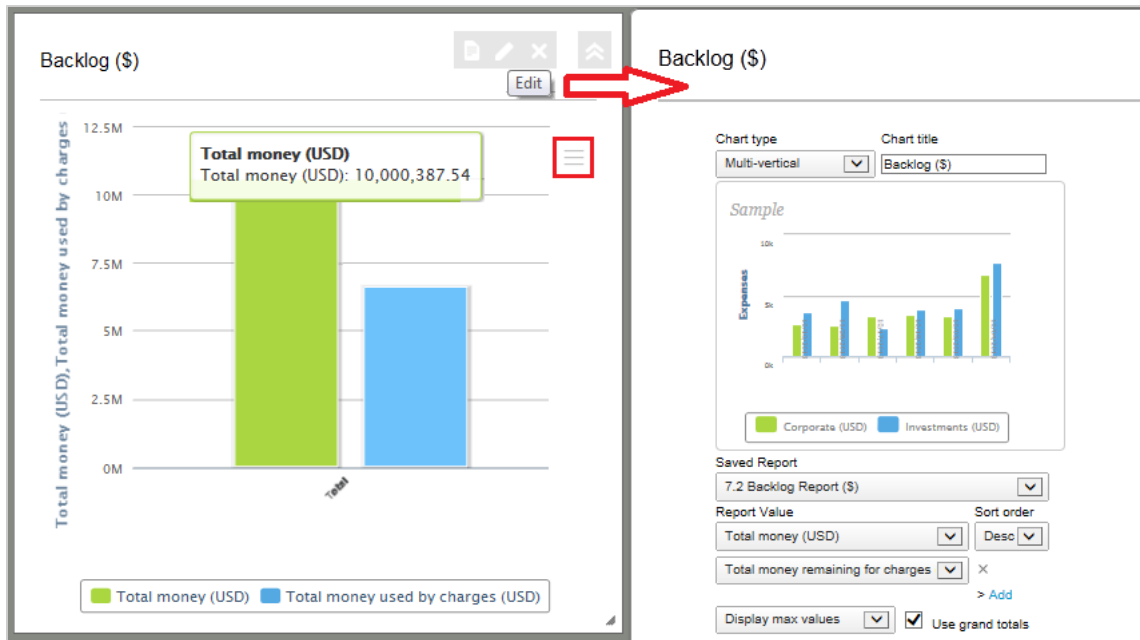
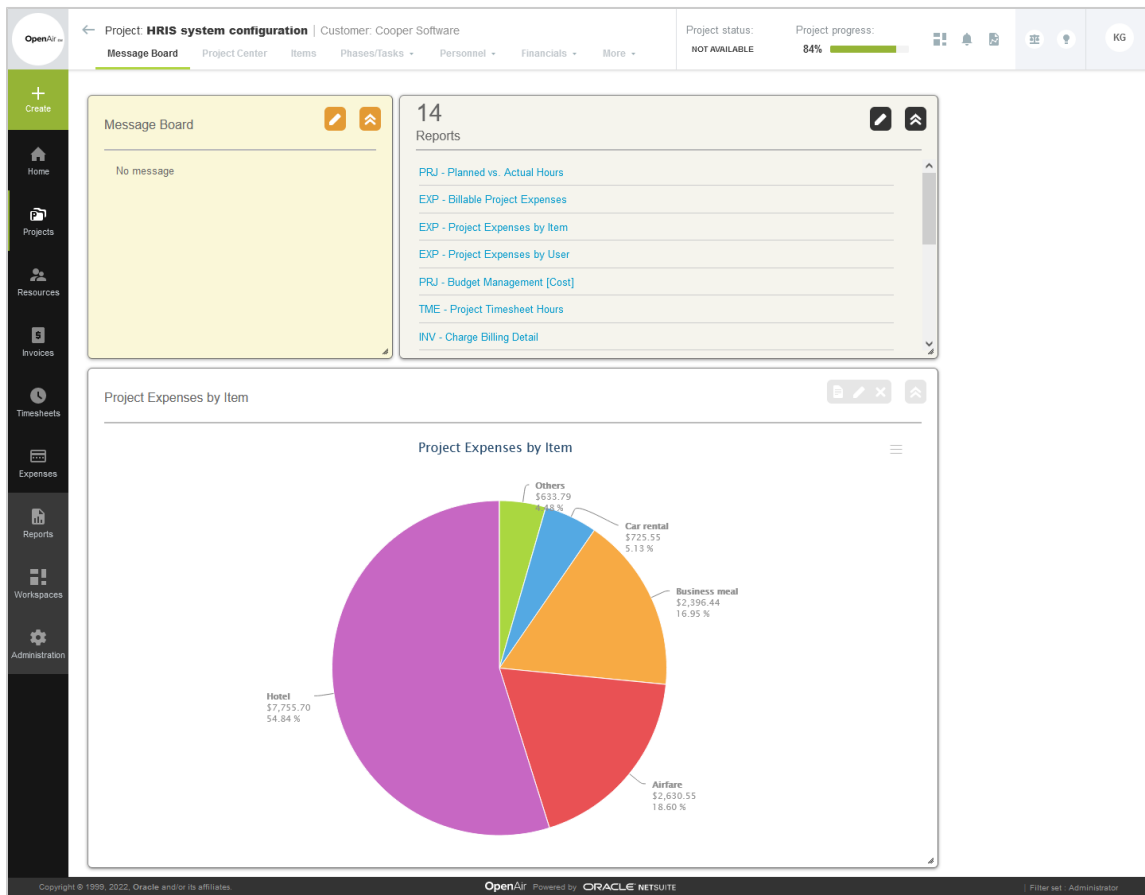


Chart features:

- **Dynamic** — You can directly interact with the charts by simply clicking on them. For example, you can hide a series by clicking on the series in the legend.
- **Tooltip Labels** — Point to a chart to display a tooltip with information on each point and series. The tooltip follows as the user moves the mouse over the graph, and great efforts have been taken to make it stick to the nearest point as well as making it easy to read a point that is below another point.
- **Export Chart** — You can export the chart as an image by clicking on the icon.
- **Chart Preview** — You can see a preview of the chart type when editing the Chart [Portlet](#).
- **Chart Types** — The following new chart types are available in OpenAir: Donut, Area Spline, Stack Area, and horizontal / vertical stacked-bar.

Project Dashboard

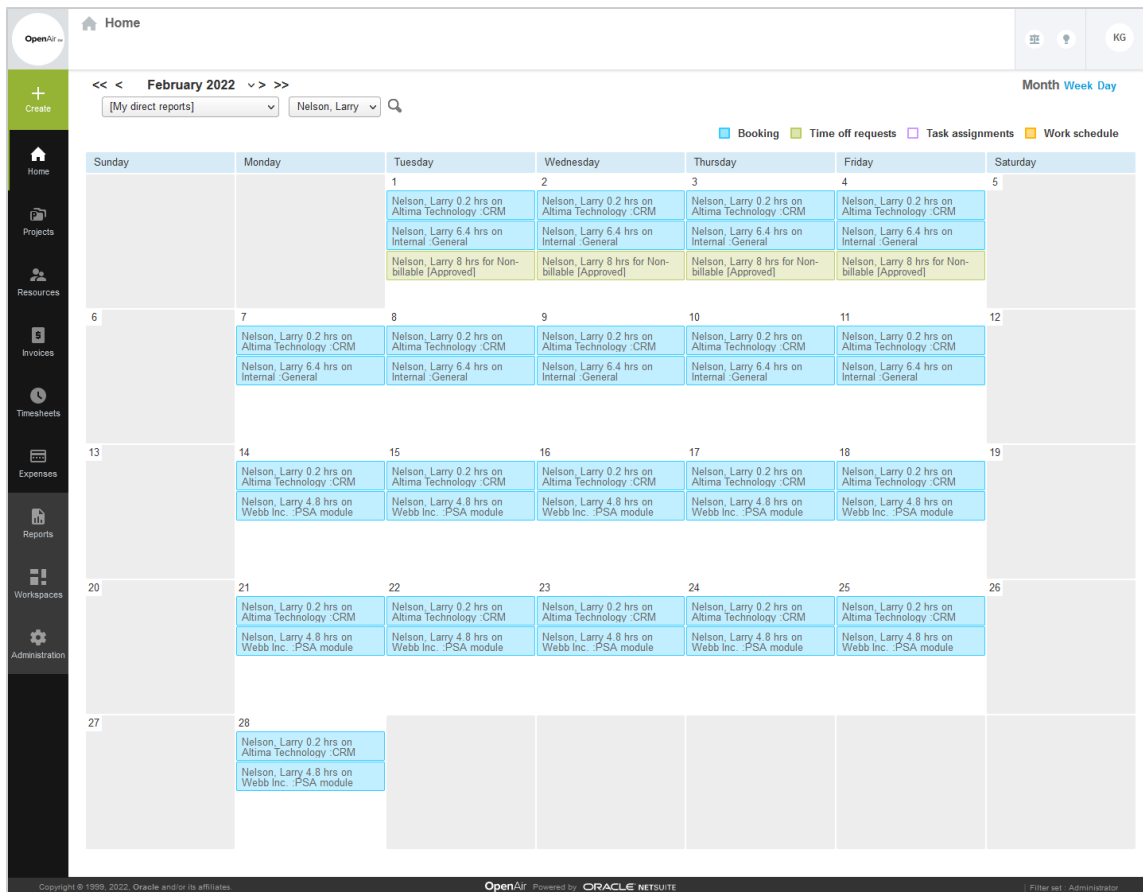


The Project Dashboard gives a visual analysis of a specific project and is useful for visually comparing projects.

Note: All items displayed on the Project Dashboard are filtered by the specific project. Only saved reports with the "Make this report available in project-specific situations" option selected are shown in the Reports portlet and available to create Charts.

Calendars

In the Calendar, information is presented in a modern, visual way, color-coded by type. A multi-level filtering system allows users to create various data configurations depending on their needs. You can always find your calendar by going to Home > Calendars. You can also add a My Calendar tab to other modules' in-module navigation (please see [Customizing the Calendar](#) below).



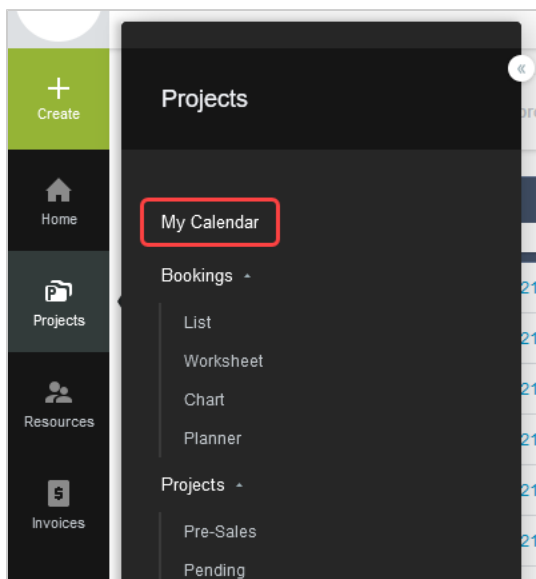
Calendar features:

- **Colors** — Calendar items are color-coded for ease of identification.
- **Item Count** — A count is displayed of items not visible in each calendar cell.
- Clicking a day in the calendar opens a list of events for that day by type, along with a summary, details, and notes. Clicking an entry under **Summary** opens a window with more details about that entry.

Customizing the Calendar

The calendar and the information it displays can be customized by going to Administration > Global Settings > Display > Interface: Display. The following options all affect the Calendar's availability in various modules:

- **Hide the 'My Calendar' tab** — hides the My Calendar tab across the account. This setting is mutually exclusive with **Show 'My Calendar' tab in all modules**. If both are selected, the My Calendar tab will be hidden.
- **Maximum number of rows to display per day in 'My Calendar' monthly view** — controls how many rows are displayed for each day in the monthly calendar view. The default (and minimum) is 4 rows, and can be increased up to 10. The option to display all rows regardless of number is also available.
- **Show 'My Calendar' tab in all modules**. — shows the My Calendar tab to the in-module navigation in all modules. This setting is mutually exclusive with **Show 'My Calendar' tab in all modules**. If both are selected, the My Calendar tab will be hidden.



The following options affect the information which appears on each calendar item in the calendar display and in the **Summary** or **Detail** fields in the list of events.

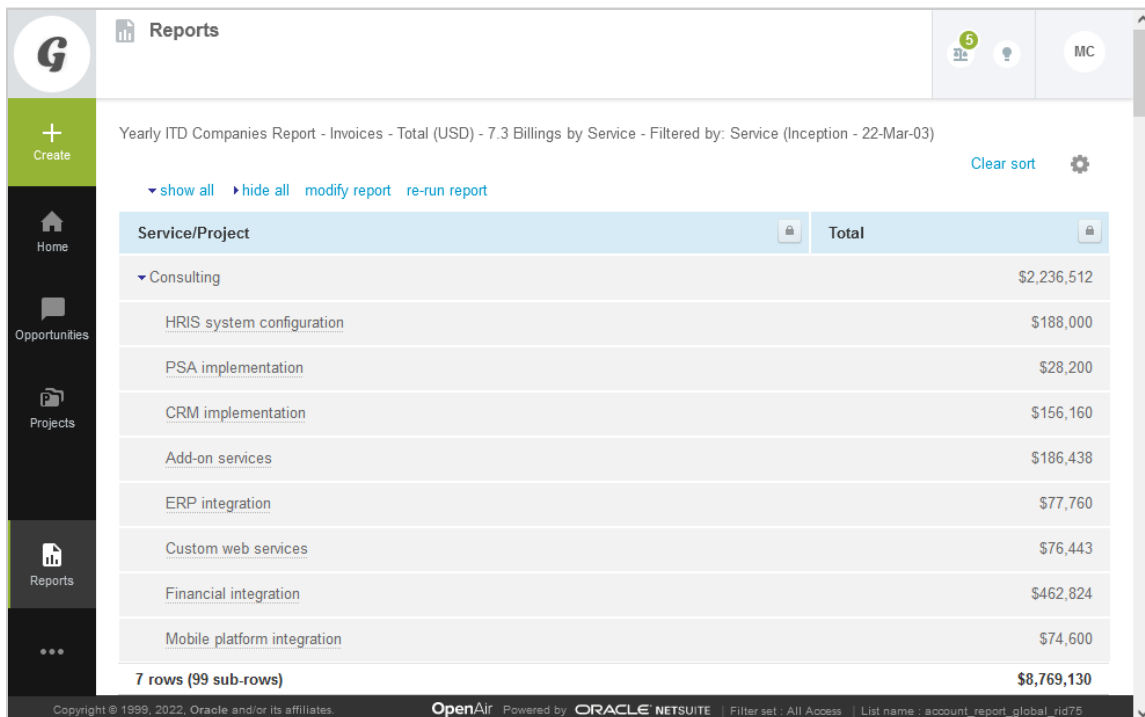
Carter, Tom 4 hrs (50%) on Webb Inc. :BI tool installations. ➡ Carter, Tom 4 hrs (50%) on Webb Inc. :BI tool installations. Tentative

- Show booking type for bookings as summary on the calendar — shows booking type information in the calendar.
- Show custom fields for bookings as summary on the calendar — shows active booking custom fields in the calendar and summary.
- Show custom fields for bookings as detail on the calendar — shows active booking custom fields in the calendar and detail.
- Show custom fields for task assignments as summary on the calendar — shows active task custom fields in the calendar and summary.
- Show custom fields for task assignments as detail on the calendar — shows active task custom fields in the calendar and detail.

Working with Reports

Reports

Reports take their design from the [List Views — Previous UI Version Layout](#).



The screenshot shows the OpenAir Reports interface. The header includes the OpenAir logo, a 'Reports' tab, and user controls (notifications, help, and a user icon labeled 'MC'). The main content area displays a report titled 'Yearly ITD Companies Report - Invoices - Total (USD) - 7.3 Billings by Service - Filtered by: Service (Inception - 22-Mar-03)'. Below the title are links for 'show all', 'hide all', 'modify report', and 're-run report', along with a 'Clear sort' button and a settings gear. The report is presented as a table with two columns: 'Service/Project' and 'Total'. The table lists various services under the 'Consulting' category, including HRIS system configuration, PSA implementation, CRM implementation, Add-on services, ERP integration, Custom web services, Financial integration, and Mobile platform integration. The total for all services is \$8,769,130. The footer of the report indicates '7 rows (99 sub-rows)'.

Service/Project	Total
Consulting	\$2,236,512
HRIS system configuration	\$188,000
PSA implementation	\$28,200
CRM implementation	\$156,160
Add-on services	\$186,438
ERP integration	\$77,760
Custom web services	\$76,443
Financial integration	\$462,824
Mobile platform integration	\$74,600
7 rows (99 sub-rows)	\$8,769,130

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Reporting controls can be found in the header.

Report Management and Editor

Note: The functionality described in this help topic is only available if the Report Management and Editor optional feature is enabled for your account and if you have sufficient privilege to access the feature. For more information contact your account administrator.

The Report Management and Editor optional feature lets you:

- Search for saved reports and report templates by name or content. The interface shows a list of results as you type and lets you preview the configuration of each report. You can perform all available report actions directly from the search results.
- Edit saved reports or create new reports from templates using the report editor. The report editor lists available dimensions and measures, which you can drag into your rows and columns to create your report. You can also select filters and preview your report layout as you edit the report. You can preview the report data, run and view the full report directly from the report editor.

Note: Advanced reports are not currently supported in the Report Management and Editor interface.

The screenshot shows the 'Management' tab in the Report Management interface. A search bar at the top contains the text 'project'. Below the search bar, there are filters for 'Filter reports which (can) contain Measures and Attributes' and 'Filter reports which can/are Grouped by Hierarchies and Dimensions'. A list of reports is displayed, including '2.1 Project Operations Summary', '2.3.1 Project Burn (Hours)', and '2.3.2 Project Burn (\$)'. The '2.1 Project Operations Summary' report is selected, and its details are shown on the right. The details include Category: Saved, Type: Crosstabbed, Template: Account-wide - Company, Owner: Collins, Marc, Created: 15-Dec-18, Last saved: 15-Dec-15, Last view: 20-Oct-29, Duration: 0, and Total views: 76. A table preview is also shown with columns for Company/Project owner/Project/Employee, PROJECT (Customer, Budget hours, Budget Revenue (USD)), and TOTAL (Projects - Project billing hours, Projects - Project billing amount (USD)).

Searching Reports in the Report Management Interface

Note: The functionality described in this help topic is only available if the Report Manager and Editor optional feature is enabled for your account and if you have sufficient privilege to access the feature. For more information contact your account administrator.








The report management interface lets you search for saved reports and report templates by name or content. The interface shows a list of results as you type and lets you preview the configuration of each report. You can perform all available report actions directly from the search results.

To access the report management interface, go to Reports > Management.

The screenshot shows the 'Management' tab in the Report Management interface. A search bar at the top contains the text 'project'. Below the search bar, there are filters for 'Filter reports which (can) contain Measures and Attributes' and 'Filter reports which can/are Grouped by Hierarchies and Dimensions'. A list of reports is displayed, including 'Account-wide - Projects', '1.1 New Projects Validation', '2.4 Project Status Report', '1.1 New Projects Validation', '2.4 Project Status Report', 'Timesheets - Projects', 'Projects - Tasks', 'Projects - Issues', and 'Resources - Projects'. The '2.4 Project Status Report' report is selected, and its details are shown on the right. The details include Category: Saved, Type: Tabular, Template: Account-wide - Projects, Owner: Collins, Marc, Created: 2015-12-18, Last saved: 2015-12-18, Last view: 2021-10-28, Duration: 0, and Total views: 132. A table preview is also shown with columns for Name, Client, Project owner, Scheduled project start date, Calculated project finish date, Planned hours, % Complete, Budget hours, Worked hours, Cost center, and Budget.

The report management interface includes the following panels:

1. **Search panel** — You can search report templates and saved reports by:
 - Name
 - Measures or attributes (columns) available for inclusion in the report
 - Hierarchies or dimensions (rows) available for inclusion in the report
2. **Results panel** — The list of search results is updated as you enter search criteria. The results include tabular (detail) or crosstabbed (summary) report templates and saved reports you have access to.
 - Results are organized in tabs. Depending on your access privileges, tabs may include **All** (all reports you have access to), **All Saved** (all saved reports you have access to), **My Saved** (saved reports you own), **Shared** (saved reports others have shared with you), **Tabular** report templates, **Crosstabbed** report templates. The number of reports available in each tab is indicated under the tab title.
 - Each report template has a rating between 0 and 10, depending on how often the template is used by OpenAir users. Report templates that are used very often have a rating of **10**, reports that are rarely or never used have a rating of **0**. Saved reports have the same ratings as the report templates they are based on.
 - Each result entry includes the name of the report and icons corresponding to the actions available for this report.

Action Icon	Description
	Run the report.
	Edit the report in the report editor. See Creating and Editing Reports in the Report Editor .
	Download the report as CSV, HTML or PDF.
	Delete the report.
	Schedule the report — Configure OpenAir to run and send or publish the report automatically at regular intervals.
	Share the report with other employees in your company.
	File the report in a specific folder in OpenAir.

- Click a report name to preview the report.
3. **Preview panel** — Preview any report listed in the search results panel. The preview panel shows information about the report and a preview of the report layout. When previewing a report template, the preview layout includes any dimensions and measures entered in the search panel in the same order.

Click **New** to create a new report from a template, or **Edit** to modify a saved report using the report editor. See [Creating and Editing Reports in the Report Editor](#).

The report information includes the following details:


- The **Report rating** appears in the top left corner, next to the **Report name**.
- The **Category** indicates whether it is a saved report, a report template, or a shared report.
- The **Type** indicates whether the result is a tabular (detail) or crosstabbed (summary) report. Advanced reports are not currently supported in the report management interface.
- Which report **Template** this saved or shared report is based on (if applicable).
- The **Owner** of the report

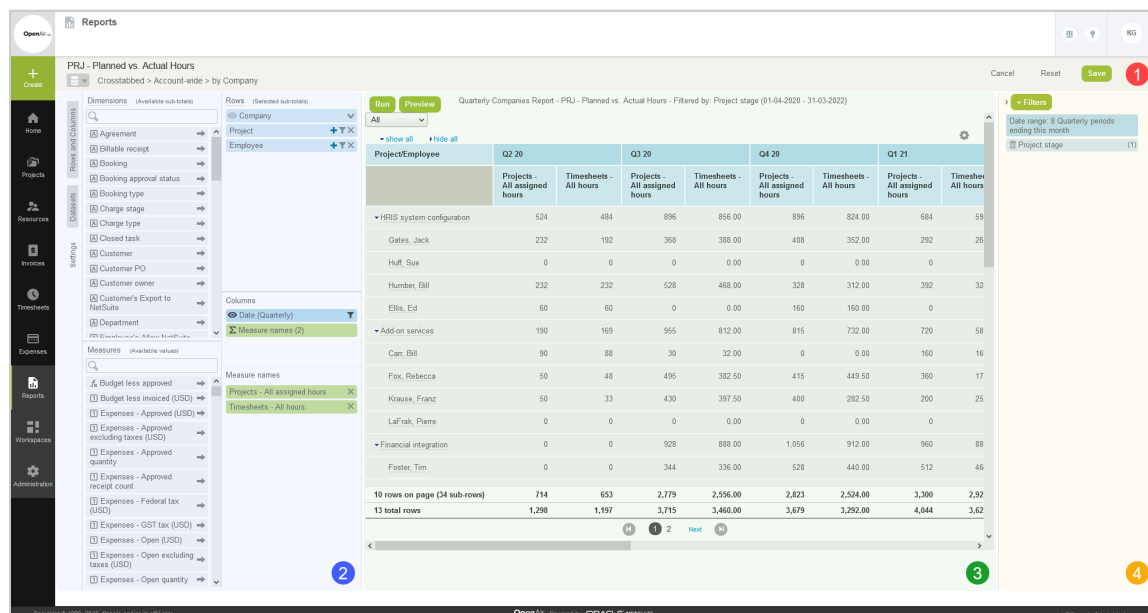
- The date when the report was **Created**.
- The date when the report was **Last saved**.
- The date when the report was **Last viewed**.
- The **Duration** of the last run for this report.
- The **Total views** (total number of views) for this report across all account users.
- When the report is **Scheduled** to run automatically (if applicable).
- The **Folder** this report is filed in.
- Who the report is **Shared with**.
- Report **Notes / description**
- **Template specification** — The following additional information is shown for report templates.
 - **Intro** — Brief description of the template report and its layout.
 - **Dataset** — Which OpenAir tables the information in this report template is sourced from.
 - **Grouping** — The primary grouping and other potential groupings for this report template.
 - **Hierarchy** — Which hierarchies are supported (if applicable).

Creating and Editing Reports in the Report Editor

The report editor lets you create, edit, test, and run reports from a single page, without the need to switch between forms and previews or to refresh the page.


To access the report editor, go to Reports > Management, search for saved report or report template, then do one of the following:

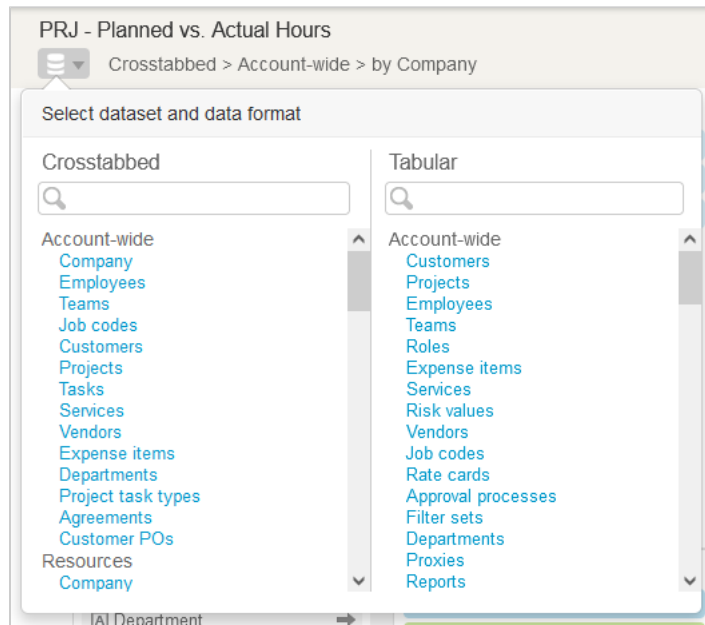
- Click the edit icon  under the name of the report in the results panel.
- Click **New** in the preview panel (to create a new report from a report template).
- Click **Edit** in the preview panel (to modify a saved report).









The screenshot shows the OpenAir Reports Management interface. The sidebar on the left contains navigation links: Home, Projects, Resources, Reports, and Administration. The main content area is titled 'PRJ - Planned vs. Actual Hours' and shows a report for 'Crossstabbed > Account-wide > by Company'. The report is filtered by 'Project stage (01-04-2020 - 31-03-2022)'. The report table has columns for 'Project/Employee', 'Q2 20', 'Q3 20', 'Q4 20', and 'Q1 21'. Each quarter column has sub-columns for 'Projects - All assigned hours' and 'Timesheets - All hours'. The table lists various employees and projects, including 'HRIS system configuration', 'Gates, Jack', 'Huff, Sue', 'Humber, Bill', 'Ellis, Ed', 'Add-on services', 'Carr, Bill', 'Fox, Rebecca', 'Krause, Franz', 'LaFrah, Plame', 'Financial integration', and 'Foster, Tim'. The bottom of the table shows '10 rows on page (34 sub-rows)' and '13 total rows'. The interface also includes a 'Run' button, a 'Preview' button, and a 'Filters' panel on the right.

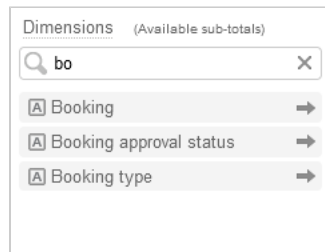
The report editor includes the following elements:







1. **Report header** — The report header shows the report name and the template the report is based on. The report also lets you enter a new name for the report, select a different report template to create a new report, and save or discard the changes made.
 - To change the report name, click the report name and enter a new name. The default name for a new report is "Untitled".
 - To create a new report from a different report template, click the dataset icon  and select the report template.



- The report header for tabular (detail) reports include a **Rollup** check box. Check the **Rollup** box to add the ability to aggregate and drill down your report data to different levels defined by non-measurable attributes in your report layout.
 - To save changes made to your report, click **Save**, to clear the report configuration and revert to the default template report configuration, click **Reset**, to discard unsaved changes and go back to the report management interface.
2. **Report configuration pane** — The report configuration pane includes three vertical subtabs.
 - **Rows and Columns** — The Rows and Columns subtab shows the information currently included in the report layout. For roll-up tabular reports and crosstabbed reports, it includes three panes, with lists of rows, columns and measure names in the report. For standard tabular reports, it includes the Rows pane only. The Rows and Columns subtab includes the following functionality:
 - Dimensions (non-measurable attributes or aggregation levels) and dates show with a light blue color background. Measures (aggregated values) show with a green color background.
 - Drag a row, column or measure to change the order of rows, columns or measures in the report.
 - Click the remove icon  to remove the row, column or measure from the report.
 - Click the visible icon  to show or hide a row or a column. The icon shows in dark gray color when the row or column is visible on the report, and in light gray color when the row or column is hidden.

- Click the total icon  to show or hide total columns for all measures. The icon shows in dark gray color when the total columns are visible on the report, and in light gray color when the total columns are hidden.
- Click the filter icon  to add or modify a filter based on the row or column. The icon shows in dark gray color when there is an active filter, and in light gray color when there are no active filters.
- Click the add icon  to add an entity attribute or dimension to the report.
- Click the edit icon  to modify the list of entity attributes or dimensions included on the report.
- **Datasets** The Datasets subtab shows the information that you can include in the report layout. For roll-up tabular reports and crosstabbed reports, it includes two panes, with lists of dimensions (aggregation levels defined by non-measurable attributes) and measures (aggregated values). For standard tabular reports, it includes the Attributes pane only. The Datasets subtab includes the following functionality:
 - Enter a few characters into the search bar to filter the list of attributes, dimensions, or measures as you type.



- Icons indicate the dimension or measure type:
 - Dimensions:  (Text) or  (Hierarchy).
 - Measures:  (Count or Total),  (Time - Calculated from the number of days),  (Time - Calculated from the number of hours), or  (Custom calculation).
- Point to an attribute, a dimension, or a measure to view a tooltip description.
- Click an attribute, a dimension, or a measure to add it to your report. You can also drag it to the **Rows**, **Columns** or **Measures** panel. The cursor changes to indicate valid or invalid drop locations.

- **Settings** — The Settings subtab shows a form with other report configuration settings.

PRJ - Planned vs. Actual Hours
Crosstabbed > Account-wide > by Company

Options

Receipt type for Expenses values: All

Charges to include for Invoices values: All charges

Date to use for Invoices values: Charge date

Open charges will always use the charge date

Date to use for Expenses values: Receipt date

Date to use for Projects values: Assignment date

Date to use for Timesheets values: Time entry date

Employee "Timesheet required": All

Hide empty company rows: Yes

Color Coding: > Create

Suppress color coding on subtotals: No

Only display report total column: No

Multicurrency rounding precision: Use global report options setting

Percentage format for all selected percentage values: 83.25%

☒ Display percentage symbols in all rows

Hours per day determination

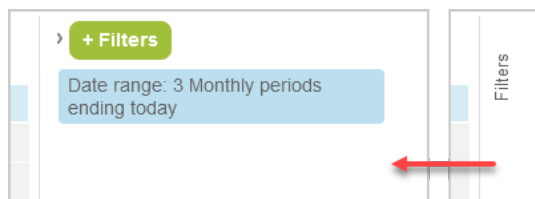
☐ Use this number of hours:

☒ Use default company work schedule, currently: 8

Note: You can use the Rows and Columns and Datasets subtabs side by side in the configuration pane to add attributes, dimensions and measures to your report. However, the Settings subtab cannot be shown alongside another subtab.

3. **Report View or Preview pane** — Preview your report layout without data as you change the configuration. Click **Preview** to test your report with sample data limited to one record, click **Run** to run the full report.
4. **Filters pane** — The filters pane lets you review and modify existing filters, or add new filters to include just the information you want to report on.
 - Click **+ Filters** to add a new filter, or click a filter to modify it. A window appears to let you define the filter or select the values you want to include or exclude.


The filters pane can be minimized. Click the arrow pointing right to minimize the filters pane, or click Filters to view the filters pane.





Configuring OpenAir to Run and Deliver a Report Automatically

You can use the Schedule feature in the OpenAir Reports application to run and deliver your reports automatically at regular intervals.

To configure OpenAir to run and deliver a report automatically:

1. Go to Reports > Saved reports > My reports, or to Reports > Management.
2. Locate the report you want to run automatically.
3. Click the schedule icon  in the **Action** column or under the report name. The Schedule report form appears.
4. In the General section of the Schedule Report form:
 - a. Check the **Run the report at the following time** box.
 - b. Select a **Day** and time (Eastern Time | UTC-5) to set the frequency of publication. The publication schedule can be set to run everyday, or on a specific day of the week or month.
 - c. Check the **CSV** box to include the report as a CSV file.
 - d. Check the **PDF** box to include the report as a PDF file.
5. In the Email options section of the Schedule form:
 - a. Check all applicable boxes under **Email the generated files to**. The report are sent to your email address by default but you can also check the **All the employees who share the report** box, or check the **Additional contacts** box and click **Create** to select the contacts you want to include.
 - b. Enter the sender email address to use under **The email is from**.

 **Note:** Depending on the configuration of your OpenAir account, sending system-generated email from a custom address may not be permitted. When this is the case, a note under the text box advises you so, and email is sent from www@openair.com.
 - c. Enter a **Subject** line. The default value is Scheduled Report: [Report Name].
 - d. (Optional) Enter additional text for the body of the message under **Optional email text**.

 **Note:** Metavalues such as %%date%% are not supported in scheduled report email subject line and message body.
6. Check the **Email me additional information if the report returns no data** if you would like to receive an email notification if the report returns no data.
7. Click **Save**.

Personal Settings

Click **Personal settings** in the User Center to configure your personal settings and optional features. Personal Settings override any corresponding settings set by your company.

Note: The options which you see in your Personal Settings depend on your user role and your company's settings. Some options may not be available to you.

General

Allow support log in

When enabled, OpenAir Customer Support personnel can log into your account. This setting is usually used for troubleshooting and support.

Optional Features

Show the list name in page footer

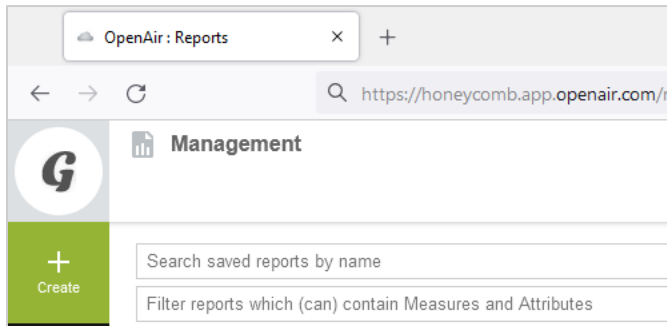
Displays the list name in the bottom right corner of the screen when in a list view.

14-Nov-01	15-Jan-09	660.00	660.00
14-Jul-02	14-Oct-31	1,000.00	1,000.00
		23,157.75	19,687.80

| Filter set : All Access
List name : pm_list_all

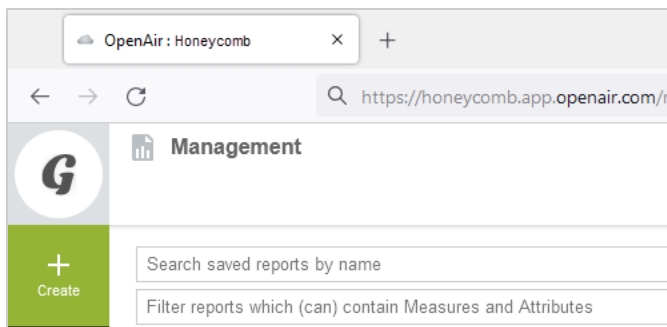
Show currently active module name in the browser title bar

Displays the name of the active module in the browser bar or tab. When this option is cleared, only "OpenAir" appears in the browser bar or tab.



Show company name in the browser title bar

Displays the company name in the browser bar or tab. When this option is cleared, only “OpenAir” appears in the browser bar or tab. The company name which appears is the same as the Company ID used on the OpenAir sign in page.



Time Settings

Time zone

Controls which time zone is used in OpenAir.

Use 24-hour clock for time entry and display

When selected, OpenAir uses 24-hour time (for example, 1:00 p.m. will appear as 13:00) for displaying time in OpenAir. When cleared, OpenAir will display time using the 12-hour clock with “AM/PM” notation.

Regional Settings

Language

Controls the language used in OpenAir.

Date format

Controls how dates are displayed in OpenAir.

Number format

Controls how numbers and decimals are displayed throughout OpenAir, including whether a decimal is represented by a period (.) or comma (,), and which delimiter OpenAir uses for digit grouping in numbers larger than 999.

List separator for CSV output files

Controls which list separator (for example, a comma (,) or a semi-colon (;)) is used to separate values in CSV output files.

Print Settings

Page size for generating PDF pages

Controls whether OpenAir PDF files are generated in Letter or A4 size.

Dashboard Options

Display zero items on dashboard

Displays the entire array of reminder and status options available in the dashboard tab, even if there are no active items requiring attention. This option is disabled by default because the full set of items may be long if you have access to all service modules.


Timesheet Options

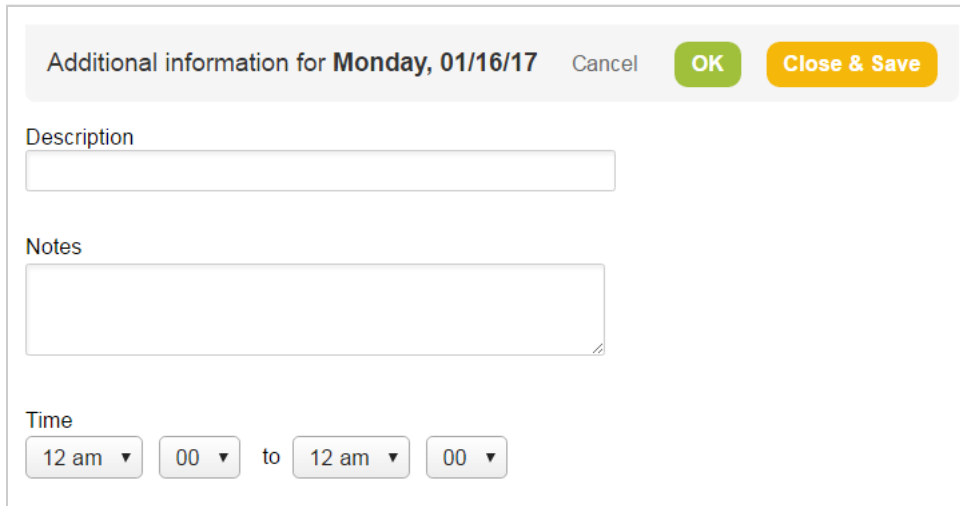
Sort timesheets alphabetically by customer and project

This setting re-sorts time entries by customer and project after saving. As time entries are input into the timesheet and submitted, the customer:project entries are sorted alphabetically within each day instead of the order they are entered.

Enable start and end time entry on timesheets

When checked, you can enter a start time and end time for each time entry. It can be used to log start and end time for a portion of the day when you worked on a particular project or task. You can also add a start time column and end time column to the time entry list view.

To enter a start time and end time, click the Notes icon  and enter a start time and end time for each time entry on the timesheet grid in the additional information popup window for the time entry. Click **OK** or **Close & Save** to save the changes and return to the timesheet grid.



Additional information for **Monday, 01/16/17** Cancel OK Close & Save

Description

Notes

Time

12 am ▼ 00 ▼ to 12 am ▼ 00 ▼

Display all weeks for timesheets containing multiple weeks

When this feature is enabled, you can work with all the weeks of a multi-week timesheet in the same grid view.

1 Mon	2 Tue	3 Wed	4 Thu	5 Fri	6 Sat	7 Sun	8 Mon	9 Tue	10 Wed	11 Thu	12 Fri	13 Sat	14 Sun	15 Mon
8	8													
8	8													

Enable Approvals on Mobile apps for Timesheets

Displays the **To Approve** line for Timesheets on the OpenAir for Mobile app dashboards.

Expenses Options

Default to expense worksheet when viewing an expense report

Automatically displays the expense worksheet when you create an expense report instead of displaying the receipts form.

Cancel
Save & Submit
Save

[Add]
☒ Add blank row
☐ Add row duplicated from selected row

Client : Project	Expense item	Date (MM/DD/YY)	Quantity	Price	Amount	Foreign	Currency
Altima Technology : ERP deployment	Airfare	03/02/16	1	468.76	468.76	<input type="checkbox"/>	USD
Altima Technology : ERP deployment	Select...		1			<input type="checkbox"/>	USD
Altima Technology : ERP deployment	Select...		1			<input type="checkbox"/>	USD
Altima Technology : ERP deployment	Select...		1			<input type="checkbox"/>	USD
Total:			4				

Enable Approvals on Mobile apps for Expenses

Displays the **To Approve** line for Expenses on the OpenAir for Mobile app dashboards.

Invoices Options

Disable confirmation when using the 'Generate New Revenue container' section on invoices.

When this option is cleared, OpenAir opens an "Automatically Generate New Revenue container" confirmation dialog when "Generate Revenue Container" or "Submit and Generate Revenue Container" are clicked in an invoice. Select this option to disable this confirmation dialog. This option can also be selected within the dialog itself.

Automatically Generate New Revenue container

Create all available new recognition transactions associated with the 'ERP deployment' project.

Generate a new Revenue container for all existing recognition transactions associated with the 'ERP deployment' project.

☐ Do not show this confirmation request again (it can be turned back on in personal settings).

Continue

Projects Options

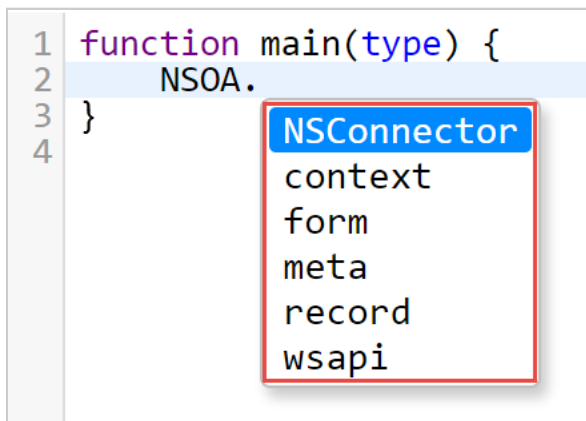
Preferred landing page for projects

Controls which page opens when a project is opened, for example, the Task List or Properties.

Scripting Studio Options


Enable script deployment editor content assist auto activation

When selected, when you type the text "NSOA" into the Scripting Studio editor, and then type a period (.), the Auto List window appears with all available options which can follow "NSOA." in a script.



The user has the following options:

- Click on the required item with the mouse and double-click to select it.
- Use the up and down arrow keys to select the required item and then hit 'Enter' to select it.
- Type the first character of the required item (e.g. 'm') to highlight it and then hit 'Enter' to select it. If more than one item starts with the same letter then the first item will be highlighted and the list of options filtered.
- Hit 'Esc' to close the Auto List window and type as normal. Clicking outside of the editor window will also close the Auto List window.

 **Tip:** Press <Ctrl> + <Space> to show the Auto List window at any point in the editor.

After selecting an item from the Auto List window, the value will be copied into the editor and typing continues after the inserted value.

Script deployment editor content assist auto activation delay (milliseconds)

Controls the amount of time it takes for the Content Assist Auto Activation to appear after “NSOA.” has been typed in the Scripting Studio editor. The default value is 500 milliseconds, and the field accepts any positive number. This setting has no effect if “Enable script deployment editor content assist auto activation” is not selected.

Important: Entering a value below 200 milliseconds may cause performance issues.

Display the number of logs at 'View logs' link

Displays the number of included logs next the **View Log** link in Script Deployments list views.

Script deployments

Form Library Parameters Solutions

All ▼

Columns ▼ ⚙

Script	Status	Test employee	Log
All ▼	All ▼	All ▼	
automate_create_po.js	In testing ▼	Collins, Marc	View Log (14)

Editor Theme

Customize the script editor with a variety of selectable color schemes.

Form script deployments

Form Library Parameters Solutions **Default Script Editor Theme**

▼ Scripting Studio

Association
Project

Employee
Collins, Marc 🔍

References
No options available for selection

Event
Before save ▼

Entrance function
validateForm ▼

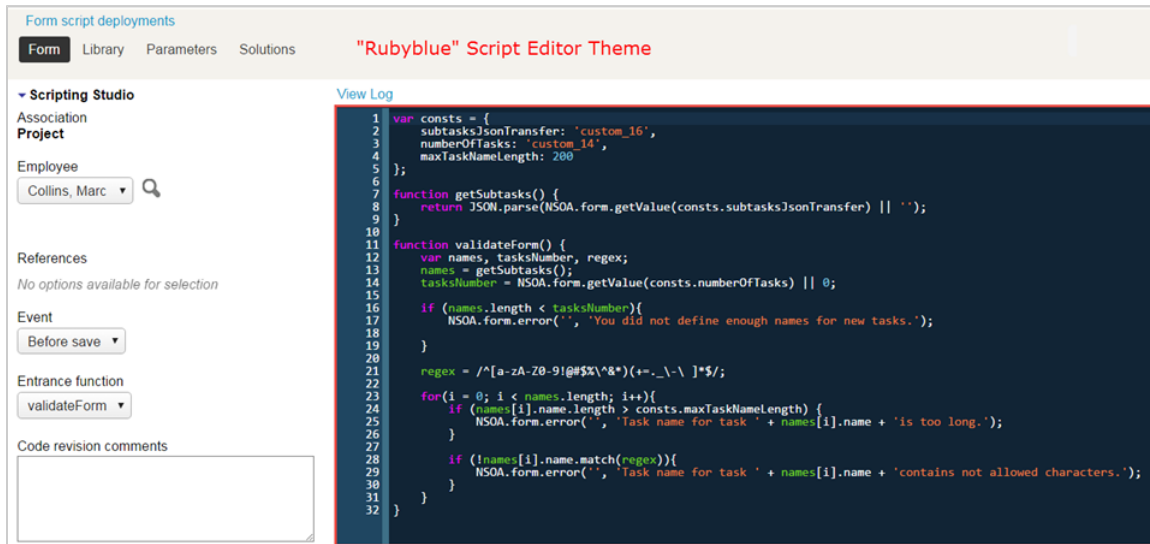
Code revision comments

View Log

```

1 var consts = {
2   subtasksJsonTransfer: 'custom_16',
3   numberOfTasks: 'custom_14',
4   maxTaskNameLength: 200
5 };
6
7 function getSubtasks() {
8   return JSON.parse(NSOA.form.getValue(consts.subtasksJsonTransfer) || '');
9 }
10
11 function validateForm() {
12   var names, tasksNumber, regex;
13   names = getSubtasks();
14   tasksNumber = NSOA.form.getValue(consts.numberOfTasks) || 0;
15
16   if (names.length < tasksNumber){
17     NSOA.form.error('', 'You did not define enough names for new tasks.');

```



Font Size

Customize the size of the text font in the script editor. This setting only affects the text within the Script Editor. All other OpenAir text uses the "Text size" User Center setting.

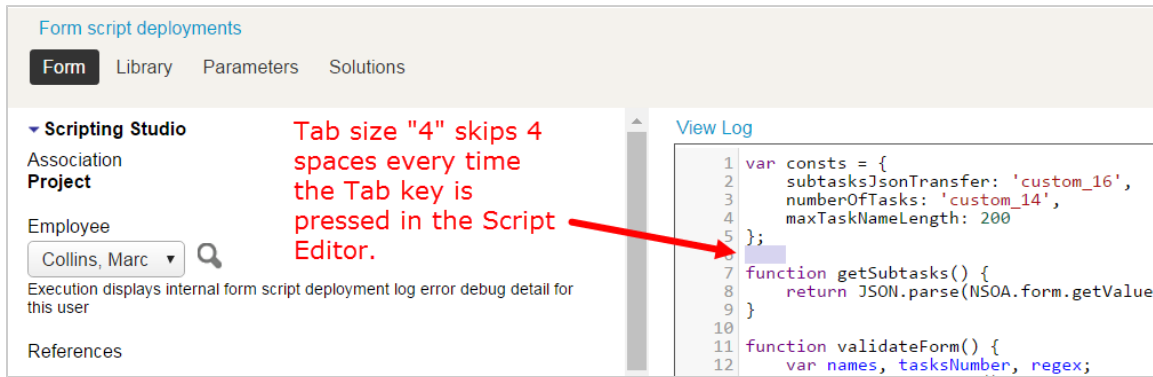


Indent Unit

Select whether an indent unit is a space or a tab in the script editor.

Tab Size

Set how many spaces a tab equals in the script editor.



Display Options

The following “Number of entries to display...” settings control how many entries appear in drop-downs throughout OpenAir.

For example, if creating a charge, you may only want to see those customers and projects which you use most frequently when selecting from the drop-down list in the “New charge” dialog. If you limit the number of customer:project combinations which are displayed in these drop-downs, the drop-downs will display only those customers and projects which you have used most recently, up to the limit specified in these settings.

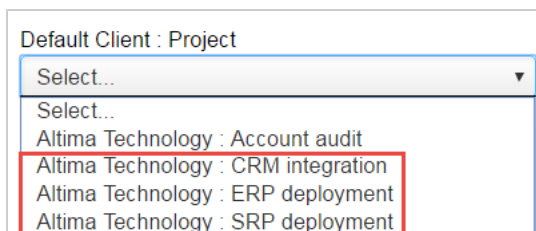
✓ **Tip:** For the best performance, do not use the “All” option for the “Number of entries” settings.

- Number of entries to display in customer:project drop-downs
- Number of entries to display in customer/prospect:deal drop-downs
- Number of entries to display in customer 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
- Number of entries to display in workspace drop-downs

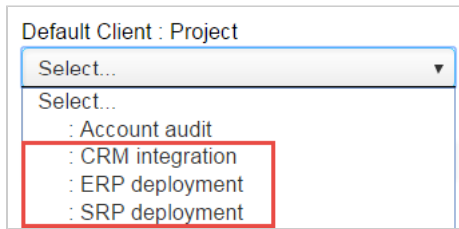
Shorten customer:project drop-downs

Controls how text appears within “customer:project” drop-downs. It contains three settings:

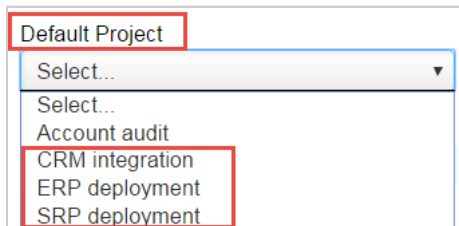
- **Do not shorten** — The drop-down displays both customer and project



- **Remove customer name, leave project name indented** — The drop-down displays a colon (:) and project name, but does not include the customer name

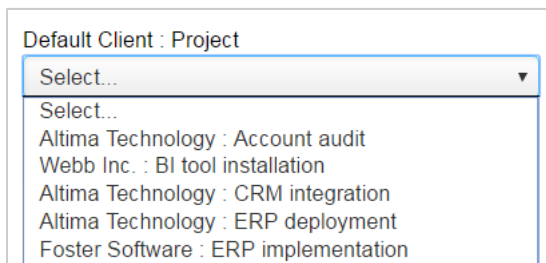


- **Remove customer name and indentation of project name** — Only displays the project name, and renames the “customer:project” drop-down to “project”.



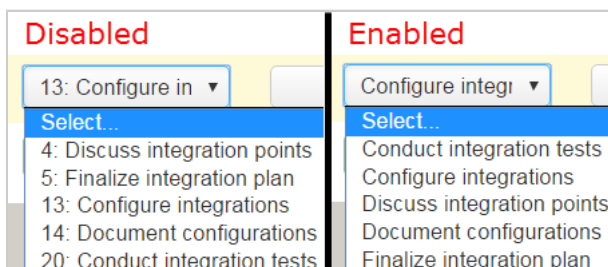
Sort the customer:project drop-downs by project

Sorts customer:project drop-downs alphabetically by project instead of by customer. The display order in the drop-down will still be “customer:project”.



Sort the task drop-downs by name and omit the ID number prefix

Displays tasks in task drop-downs in alphabetical order and removes the tasks' number prefixes.



Maximum number of rows to display per day in 'My Calendar' monthly view

Controls how many rows are displayed for each day in the monthly "My Calendar" view.

Show 'My Calendar' tab in all modules.

Displays the "My Calendar" tab in all modules. When disabled, the "My Calendar" tab only appears in "Home".

Note: If you have been assigned the "View calendars for other users" role permission, you will always see the "Calendars" instead of the "My Calendar" link in "Home". When "Show 'My Calendar' tab in all modules." is enabled in this situation, you will see "Calendars" in "Home" and "My Calendar" in all other modules.

Show Account tab in 'My Account' module only.

This setting is no longer supported, and has no effect on OpenAir.

Remember the size of popup windows

This setting is no longer supported, and has no effect on OpenAir.

Disable automatic resizing of popup windows

This setting is no longer supported, and has no effect on OpenAir.

Add the save or run button to the top right of forms

This setting is no longer supported, and has no effect on OpenAir.

Add "Save & create another" button to the top right of forms

This setting is no longer supported, and has no effect on OpenAir.

Add approval buttons to the bottom of reports

Adds an Approve/Reject Items to the bottom of Timesheet reports, as well as at the top of the report.

The screenshot displays the OpenAir Timesheet Report interface. At the top, a navigation bar includes a back arrow, the report title "Timesheet: 12/07/15 to 12/13/15 | Employee: Kwan, Jane", and buttons for "Edit", "Report", and "Submit/Approve". A sidebar on the left contains icons for various functions like Home, Opportunities, Projects, Resources, Invoices, Timesheets, Expenses, Purchases, Reports, Workspaces, and Administration. The main content area features a green "Approve/Reject Items" button at the top left, a "Skip" link, and a "Print . PDF . Download" link. Below these is a summary box for the "Timesheet Report" dated 03/03/22, covering the period 12/07/15 to 12/13/15, with a status of "Submitted". It lists the employee as Jane Kwan from the Boston department. The core of the report is a table with columns: Date, Customer, Project, Task, Description, Notes, and Hours. It contains six rows of data for dates from 12/07/15 to 12/11/15, each with an "Approve" (radio button) and "Reject" (radio button) option. Each row ends with a "Day Total" of 8 hours. The table concludes with a "Total" of 40 hours and a "Total hours - Billable" of 40. Below the table, there is a section for "Hours remaining on tasks" showing 76 hours, a note about the report being automatically created, and an "Approval history" table. The approval history table has columns for Date/Time, Action, and Notes, showing two entries from 07/26/16. At the bottom of the report, another "Approve/Reject Items" button and "Skip" link are present. The footer includes copyright information and the OpenAir logo, noting it is powered by Oracle Netsuite.

Date	Customer	Project	Task	Description	Notes	Hours
12/07/15	Altima Technology	ERP deployment	Execute system test			8
Day Total						8
12/08/15	Altima Technology	ERP deployment	Execute system test			8
Day Total						8
12/09/15	Altima Technology	ERP deployment	Execute system test			8
Day Total						8
12/10/15	Altima Technology	ERP deployment	Execute system test			8
Day Total						8
12/11/15	Altima Technology	ERP deployment	Execute system test			8
Day Total						8
Total						40
Total hours - Billable						40

Date/Time	Action	Notes
07/26/16 08:34 PM	Submitted for approval by Jane Kwan	
07/26/16 08:34 PM	Waiting for approval by Marie Porter For project entries associated with 'Altima Technology:ERP deployment'	

Anchor column titles at top of page when scrolling vertically

Column titles in list views and reports will remain in view when scrolling down the page.

Preserve row highlighting when checking boxes to select a row in list views

This setting has no effect on redesigned list views.

For list views using the previous UI layout, when you check a box to select a row in the list view, the row is highlighted in yellow to indicate the selected rows. Several rows can be highlighted at once to show all selections made before saving the list.

	Active	% Complete	Project	Customer	Attachment	Project stage	Project owner	Project Statement of Work	External
	All		All	Webb Inc.		All	Collins, Marc	All	All
<input type="checkbox"/>	✓	0%	New Project From Template	Webb Inc.		Active	Collins, Marc		URL
<input checked="" type="checkbox"/>	✓	0%	BI tool installations	Webb Inc.		Active	Collins, Marc		URL
<input type="checkbox"/>	✓	96%	PSA module deployment	Webb Inc.		Active	Collins, Marc		URL
<input checked="" type="checkbox"/>	✓	0%	PSA module deployment	Webb Inc.		Active	Collins, Marc		URL
<input checked="" type="checkbox"/>	✓	100%	Two-day consulting	Webb Inc.		Closed	Collins, Marc		URL
<input type="checkbox"/>	✓	0%	Two-day consulting	Webb Inc.		Closed	Collins, Marc		URL
<input checked="" type="checkbox"/>	✓	0%	Two-day consulting	Webb Inc.		Closed	Collins, Marc		URL
<input type="checkbox"/>	✓	0%	Two-day consulting	Webb Inc.		Closed	Collins, Marc		URL

Enable anchoring of left columns when scrolling horizontally

This setting has no effect on redesigned list views.

Row titles in list views and reports will remain in view when scrolling across the page.


Hovering over menu links reveals menu options

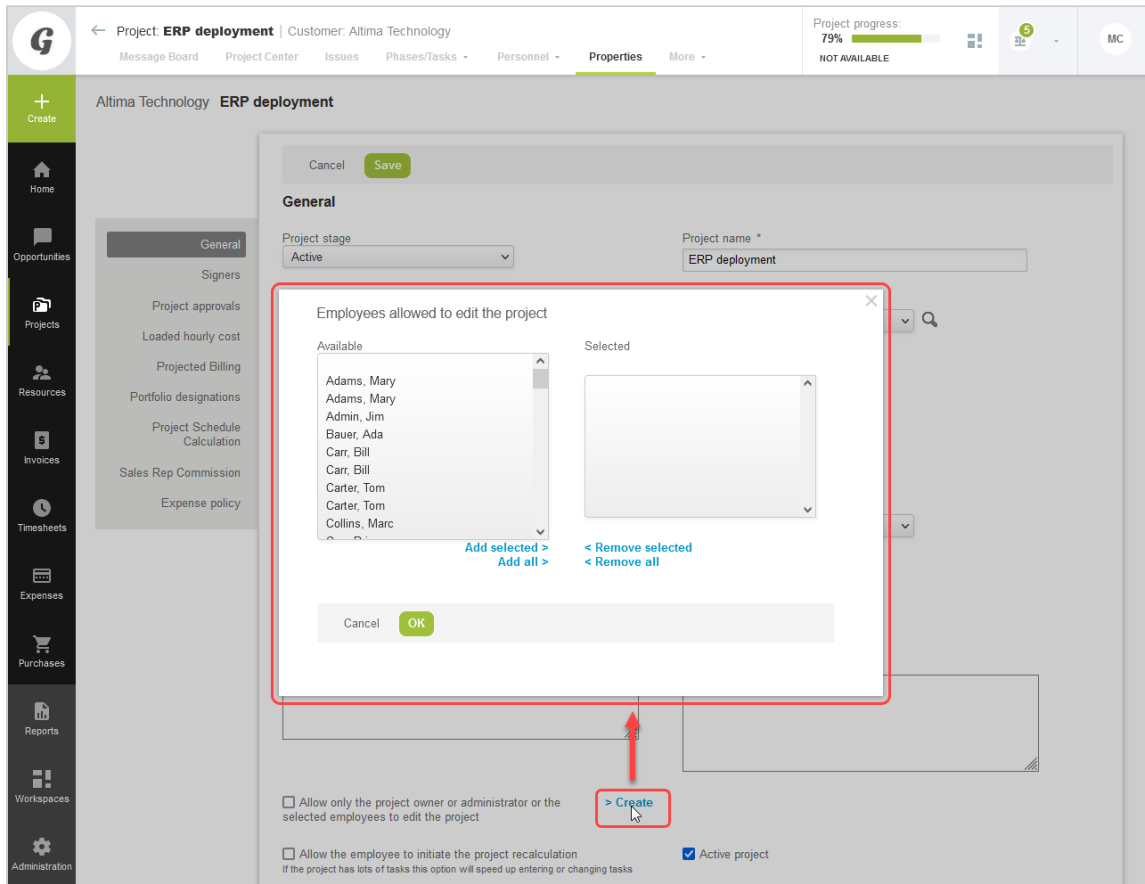
This setting has no effect on redesigned list views.

Drop-down menus open automatically when pointing to a menu. When this setting is disabled, click the menu link to open the drop-down.

Open popups as panels instead of windows.

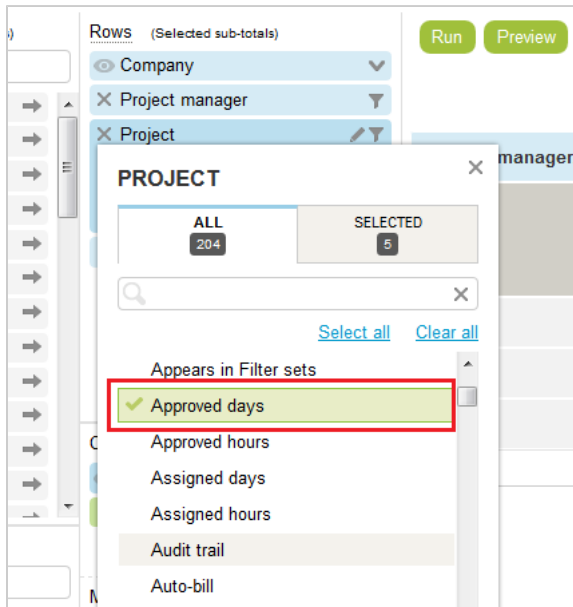
Opens OpenAir popups as in-form panels, instead of new windows. In-form popups have all of the advantages of conventional popup windows, but appear as part of the form. This allows you to block popup windows in your browser and still use all OpenAir functionality.

 **Tip:** We recommend you check this box. Using popup panels is an OpenAir best practice.



Use in-line multiple selection interface

Uses an in-line picker selection interface in various modules.



Disable QuickView

Disables QuickViews, preventing them from appearing when pointing to fields which open them.

QuickView popup activation delay

Sets the time it takes for a QuickView window to open when pointing to a field which opens a QuickView. The options available in the drop-down are time in seconds. This setting has no effect if “Disable QuickView” is selected.

Data Density

Control the data density displayed in list views with selected mode

This setting has no effect on redesigned list views.

Controls the appearance of data in list views. In “Compact” mode, the margins are trimmed and headings wrap to make more data visible. “Comfortable” mode provides more spacing.

Monthly ITD Companies Report - 2.1 Project Operations Summary - Filtered by: Project stage (Inception - 22-Mar-31)

▼ show all ▶ hide all modify report re-run report

Clear sort ⚙

Project owner/Project/Employee	PROJECT	Budget hours	Budget Revenue (USD)	T	P	F	b	h
▼ Kelly, Joan		5,400	\$1,500,000					
▶ CRM implementation	Motiva Inc.	5,400	\$1,500,000					
▼ Horton, Dave		4,000	\$1,000,000	2,057.00	\$545,507			
▶ Payroll integration	Damus Inc.	4,000	\$1,000,000	2,057.00	\$545,507			
▼ Collins, Marc		3,300		3,168.00	\$748,500			
▶ PSA module deployment	Webb Inc.	3,300		3,168.00	\$748,500			

Download list data

Density
Applies to all report List Views.
Compact
✓ Comfortable
Resize columns
Enabled
✓ Disabled

Monthly ITD Companies Report - 2.1 Project Operations Summary - Filtered by: Project stage (Inception - 22-Mar-31)

▼ show all ▶ hide all modify report re-run report

Clear sort ⚙

Project owner/Project/Employee	PROJECT	Budget hours	Budget Revenue (USD)	T	P	F	b	h
▼ Kelly, Joan		5,400	\$1,500,000					
▶ CRM implementation	Motiva Inc.	5,400	\$1,500,000					
▼ Horton, Dave		4,000	\$1,000,000					
▶ Payroll integration	Damus Inc.	4,000	\$1,000,000	2,057.00	\$545,507			
▼ Collins, Marc		3,300		3,168.00	\$748,500			
▶ PSA module deployment	Webb Inc.	3,300		3,168.00	\$748,500			
▼ Carr, Bill		6,600	\$1,544,332	4,075.50	\$773,074			
▶ Add-on services	United Software	6,600	\$1,544,332	4,075.50	\$773,074			

Download list data

Density
Applies to all report List Views.
Compact
✓ Comfortable
Resize columns
Enabled
✓ Disabled

Control the data density displayed in timesheet grid with selected mode

Controls the appearance of data in timesheet grids. In "Compact" mode, the margins are trimmed and headings wrapped to make more data visible. "Comfortable" mode provides more spacing.

Time type	Client : Project	Task	Service	Hours remaining	System estimate (hrs)	29 Mon	3
Comfortable							
Billable	Cooper Software	Select...					
Non-billable	Cooper Software	Select...					
Billable	Cooper Software						
Billable	Altima Technology : ERP						
Non-billable	Cooper Software						
Billable	Cooper Software						
Total							
Compact							
Billable	Cooper Software	Select...	Consulting				
Non-billable	Cooper Software	Select...	Consulting				
Billable	Cooper Software	Select...	Consulting				
Billable	Altima Technology : ERP deployment	Select...	Consulting				
Non-billable	Cooper Software	Select...	Consulting				
Billable	Cooper Software	Select...	Consulting				
Total							

Starting Application

Controls which module is opened by default when logging into OpenAir.

Email Settings

Bcc me on all emails

Includes you as a Bcc recipient (i.e. other recipients do not see you on the recipient list) on all emails you send from OpenAir, including from actions which trigger emails. For example, if you approve a timesheet, and the person who submitted the timesheet receives an automatic email notification of the approval, you will also receive a copy of the notification.

Authorized Applications

This Personal Settings section lists all the integration applications you have authorized to access OpenAir on your behalf.

OpenAir supports OAuth 2.0, a robust authorization framework. This authorization framework enables integration applications to access OpenAir on your behalf without needing to store or ask for your login details. Applications using this framework can only access OpenAir on your behalf if you give them explicit permission to do so.

All the authorized applications listed in this section use the OAuth 2.0 framework to obtain access to OpenAir. This section lets you revoke the permission given to any of your authorized application at any time.

For more information about authorizing and revoking applications, see [Authorizing Applications to Access OpenAir on Your Behalf](#).

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.

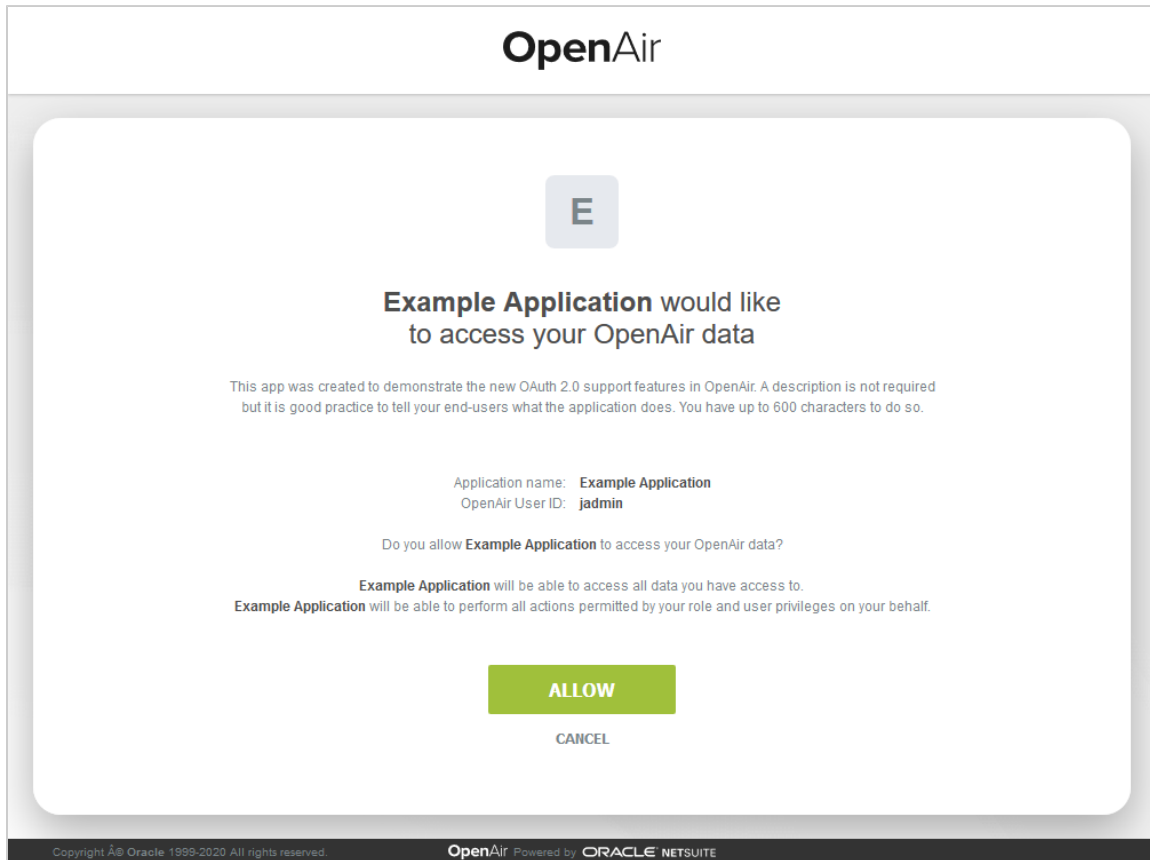
4. Click **ALLOW** to authorize the application or click **CANCEL** if you do not want the application to access OpenAir on your behalf.



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.

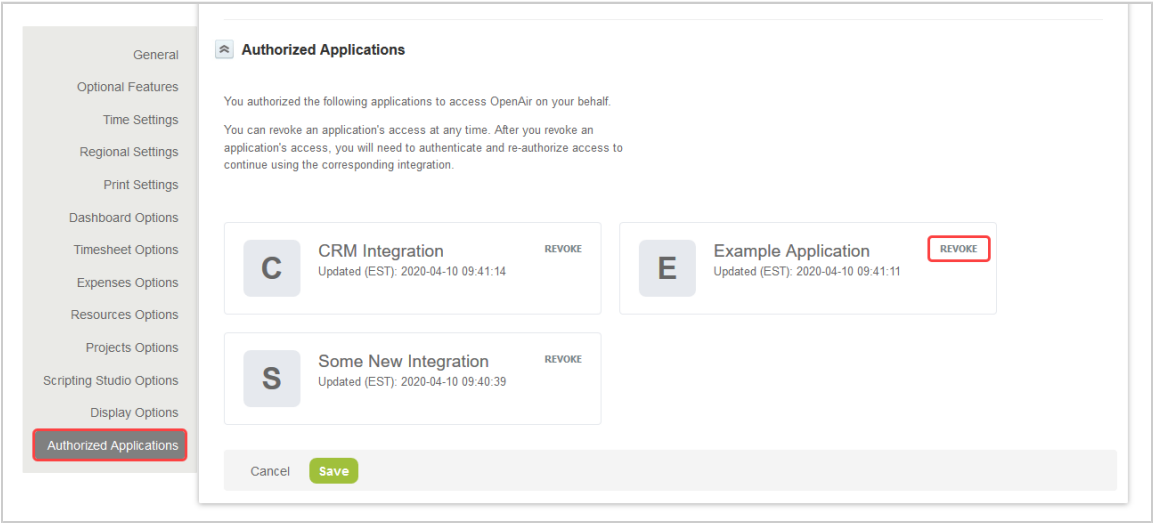
After you authorize an application, it will be able to interact with OpenAir on your behalf until you revoke the authorization.

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.

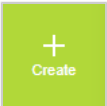


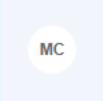
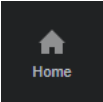
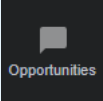
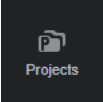
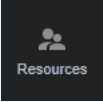


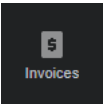
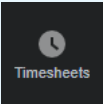
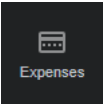
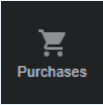
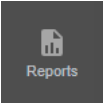
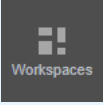
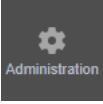
References

This section describes the icons used in the user interface.








- [Global Icons](#)
- [List View Icons](#)
- [Record Icons](#)

Global Icons









Icon	Description
	Create new content. See Create Button .
	Access screen tips. See Tips Button .
	Resource Comparison button
	User avatar (initials or profile picture). Open the User Center menu. See User Center .
	Home Application
	Opportunities Application
	Projects Application
	Resources Application

Icon	Description
	Invoices Application
	Timesheets Application
	Expenses Application
	Purchases Application
	Reports Application
	Workspaces Application
	Administration Application





List View Icons

Icon	Description
	Open Column options flyout panel
	Sort order disabled — Click to open Order by flyout panel
	Sort order enabled — Click to open Order by flyout panel
	Filters disabled — Click to open Advanced filters flyout panel
	Filters enabled — Click to open Advanced filters flyout panel
	Open Download data options screen
	Open More list view options flyout panel

Icon	Description
	Remove
	Sort ascending
	Sort descending
	First sort level (ascending in this case) — Click to clear sort order
	Second sort level (ascending in this case) — Click to clear sort order
	Third sort level (ascending in this case) — Click to clear sort order
	Add criterion row
	Remove criterion row
	Lock column
	Column locked — Click to unlock column
	Column tips and Cell tips — Click to view the contextual tips relevant to the column or for the record.
	Resize column
	Row selected — Click to deselect row
	Rows selected — Click to clear row selection
	Go to the first page
	Show the previous 12-week period (date navigation)
	Go to the previous page (page navigation), Show the previous week (date navigation)
	Go to the next page (page navigation), Show the next week (date navigation)
	Show the next 12-week period (date navigation)
	Go to the last page
	Mark as a favorite
	Marked as a favorite — Click to remove from favorites
	Open the record form to edit the record
	Display a non-editable view of the record
	Duplicate the record
	Delete the record
	Add a new record
	Add a new booking
	Expand node

Icon	Description
	Collapse node
	View the document
	Replace the document
	Place the report in a folder or remove it from its current folder.
	Publish the report to the OpenAir OData service. See the help topic Publishing Reports to the OpenAir OData Service .
	Run the report.
	Run or publish the report automatically according to a specific schedule.
	Share the report with other employees.

Record Icons

Icon	Description
	Go to the list view for this type of records
	Display Project Status News Feed
	Display the reports associated with this record
	Display the Workspace associated with this record