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Configure the default landing page for the Invoices module to be the Invoices tab.

Details

Dashboard

Enhancements to graphical dashboards

In the May 2009 product release, OpenAir introduced powerful, new graphical dashboard capabilities. With this release, the dashboard has been further enhanced in three significant ways. First, users can now rename specific dashboard tabs as they relate to pertinent information. For example, one dashboard tab may be dedicated to resource-oriented charts, while another may contain charts that display financial metrics. Second, dashboard charts can be resized as determined by each user. This provides users greater control over the visual display of their unique dashboards. Finally, multiple reporting values displayed in one report can now be graphed in one chart (available for multi-bar and line chart types). The ability to chart multiple values from one report allows users to compare two or more values in an effective manner. For example, users can choose to view planned hours versus actual hours worked on a particular project.

To enable the dynamic chart feature for dashboards, please send an email request to support@openair.com.

“Enhanced user interface” and “Application tab menu” (see November 2008 product update) must be activated to use this feature.

When this feature is enabled, Dashboard > Overview is renamed to Dashboard > Home unless “Overview” has been changed to a custom name.

How to rename dashboard tabs:

1. Navigate to Dashboard > Dashboard and select a dashboard tab to rename.
2. Use the “Dashboard tab” drop-down menu and select “Rename tab ...” Type the new dashboard tab name in the text box and hit Enter.

How to resize dashboard charts:

1. Navigate to Dashboard > Dashboard and select a dashboard tab.
2. Click on the handle in the lower right corner of a specific chart and drag the chart to expand.

How to chart multiple report values in one chart using line and multi-bar charts:

1. Navigate to Dashboard > Dashboard and select “New chart ...” The New chart settings form displays.
2. Select the “Chart type”: Horizontal multi-bar, Vertical multi-bar, or Line. Note: Multi-bar or line charts must be chosen in order to chart multiple values.
3. Type the “Chart title.” If no chart title is entered, the name of the selected report will be used.
4. Select the “Saved Report” using the drop-down list of saved reports.
5. Select the “Report Value” to chart and select the “Sort” option: either descending or ascending.
6. Click on the “Add” link to include another reporting value to display in the chart.
7. Select another “Report Value” to chart and select the “Sort” option: either descending or ascending.
8. Select the number of values to chart. The default behavior is to chart the maximum number of values.
9. Click “Save.” The chart displays the data selected.

Note: The grand totals of each reporting value will always be used when charting multiple values.

Account-wide

Assign project job codes for users on a per project basis

Resources within a company may have one specific job role within the organization, however their job function may vary based on the type of work performed on individual projects. For example, Mary Smith's job role within the Congress organization may be Project Manager, however her job function on the Coca-Cola project is a Consultant.

In this release, we have enhanced the job code functionality to allow managers to assign different job codes to users based on the specific job function being performed on particular projects. These project job codes can be assigned per user in multiple areas of the application by configuring job code rules. These areas include bookings, time entry, project level assignment, and task assignment. The appropriate project job code will be assigned when time entries are saved.

Once project job code rules have been configured, they can be linked to specific rate cards. Time billing rules can be configured to derive rates from rate cards. Thus, billing will occur based on the appropriate rate, as determined by the role an individual fulfilled for the project. Revenue recognition transactions generated from the As Billed revenue recognition rule will contain the appropriate job code assigned stemming from the hourly charges created by Billing Rules. The billing and recognition transactions list view can be customized to include the associated project job code. For forecasting purposes, charge and revenue projections will use the assigned project job codes when using time entries, and calculate project job codes (via job code rules) when forecasting using billings or project/task level assignments.

In addition, invoice layouts can be modified to include "Project job code" as an invoice column and invoice grouping. To modify an invoice layout, users with the appropriate roles privileges navigate to Administration > Application Settings > Invoices Settings > [select an invoice layout].

To enable the project job codes feature, please send an email request to support@openair.com.

How to assign project job codes for users on a per project basis:

1. To create new job codes, navigate to Administration > Global Settings > Jobs,Rates > Job codes > List job codes. From the "New" dropdown, select "Job code".
2. To configure the job code rules, click on the "Time entry rules" link.
3. Select the areas to get the job codes from. These areas may be assigned in any order, which will determine the job code assignment precedence. The first selection with a defined job code will be used when saving time entries. Note: User is always required.
4. Click Save.

Additional notes:

Bookings

The Project job code dropdown can be found in the New and Edit booking forms. The Project job code dropdown is also available for Booking requests.

Project assignment and Task assignment

"Project assignment" and "task assignment" selections are mutually exclusive.

In order to select "Project assignment", the feature "Enable task assignment at the project level" must be enabled. Please send a request to support@openair.com to have this feature enabled. To assign a project job code, navigate to Projects > Projects > [select a project] > Personnel > Assignments. The job code can be selected for each user under the "Project job code" dropdown. Note: If Project assignments are used in the job code rules, the new Project Assignment grid will automatically be enabled.

In order to select "Task assignment", the feature "Input planned hours for each user assigned to a task" must be enabled. Please send a request to support@openair.com to have this feature enabled. To assign a project job code at the task assignment level, navigate to Projects > Projects > [select a project] > Phases/Tasks > Outline view > [select a task]. On the task assignment row, each user can be assigned a

job code under the “Project job code” dropdown.

Time entry

In Timesheets, the Project job code dropdown is found in the Notes section. However, the dropdown can be exposed on the main grid by navigating to Administration > Application Settings > Timesheets Other settings. Select the option “Show the Project job code drop-down on the main grid”. If time entries are included in job code rules, the project job code may be overridden explicitly in the time entry. Note: a project job code selected directly on a time entry may still be overridden depending on the job code rules and assigned project job codes.

Accounting Period functionality

OpenAir is pleased to introduce accounting date/period functionality. Separate accounting dates can now be associated with most transactions, with reports drawing from these accounting dates. The ability to maintain separate accounting dates can be particularly useful when the original transaction date of an entity must be independent from the date, as signified by a financial report or general ledger application.

For example, the charges on an invoice dated July 5th may need to be associated with the month of June in the general ledger, as the charges were incurred in this month. In this example, the invoice transaction date would be 07/05/09, however, the invoice accounting date might be 06/01/09. In another example, a receipt incurred in March may need to be posted to the financial system in June. In this example, the receipt transaction date might be 03/17/09, while the receipt’s accounting date might be 06/01/09.

The new accounting period functionality allows users to associate an additional independent accounting date with a transaction. Reports can then be configured to leverage the accounting dates, rather than the original transaction dates.

To enable accounting period functionality, please send an email request to support@openair.com.

Once enabled, the following transactions will have an “acct_date” field available:

- Invoices
- Charges
- Envelopes
- Receipts
- Timesheets
- Time entries
- Revenue recognition transactions
- Agreements
- Customer PO’s
- Fulfillments
- Purchase items
- Purchase Orders

How to create an Accounting Period:

1. Navigate to Administration > Global Settings > Organization > Accounting Periods.
2. In the “New” drop-down, select “Accounting Period”.
3. Name the Accounting Period (Ex: “P1 November 2009”).
4. Select the start and end date for this period (Ex “11/01/09” and “11/15/09”).
5. Select the Transaction Date for this period. This is the date that will appear in the accounting date field when a transaction is created and associated manually or automatically with this Accounting Period.
6. Add any relevant notes to the “Notes” field that may be helpful (such as “This is the first of two accounting periods in November 2009”).
7. Keep “Active” selected, unless the period does not need to be active at the moment. (Inactive

accounting periods will not show up in drop-downs for association with transactions).

8. Select the “Current accounting period” checkbox to which the accounting period should be referenced if/when the “current accounting period” is selected in any billing or revenue recognition rules setups.

How to auto-populate charges’ Accounting Dates via the Project Billing rules:

1. Drill into a project and navigate to Billing > Billing rules.
2. Drill into the billing rule(s).
3. Under the “Accounting date” setup, populate the fields listed
 - i. Under the “How to get the accounting date” field, select either
 1. “Use the accounting date specified below”
 - a. If this is selected, the “Accounting date” field must be populated with a specific transaction date.

Or

 2. “Use the accounting period specified below”
 - a. If this is selected, the “Accounting period” drop-down listed below must be populated with a specific accounting period, or more commonly the dynamic “Current accounting period” selection. If the “Current accounting period” selection is picked, the Accounting Period that has the “Current accounting period” checkbox selected will be used.
4. Hit “Save”.
5. When the billing rule is next run, charges generated will have the “Accounting date” populated according to how the Accounting Period setup was populated within the rule.

How to update the Accounting Dates on charge(s)

1. Drill into a project and navigate to Revenue Recognition > Recognition rules.
2. To update the accounting date one charge at a time, drill into a charge and manually update the accounting date field.
3. To update the accounting date on revenue recognition transactions in bulk, navigate to the open charges tab within the Invoices module. Select the checkboxes next to the charges that need to be updated, click the run-an-action icon, select the “Change the Accounting Date to” item and select the appropriate accounting period. Click OK.

How to auto-populate the Accounting Dates on Revenue Recognition Transactions via Revenue Recognition rules:

1. Drill into a project and navigate to Recognition > Recognition rules.
2. Drill into the revenue recognition rule(s).

Under the “Accounting date” setup, populate the fields listed

- i. Under the “How to get the accounting date” field, select either
 1. “Use the accounting date specified below”
 - a. If this is selected, the “Accounting date” field must be populated immediately below with a specific transaction date.

Or

 2. “Use the accounting period specified below”
 - a. If this is select, the “Accounting period” drop-down immediately below must be populated with a specific accounting period, or more commonly the dynamic “Current accounting period” selection. If the “Current accounting period” selection is picked, the Accounting Period that has the “current accounting period” checkbox selected will be used.
 3. Hit “Save”.

4. When the revenue recognition is next run, these updated rules will create revenue recognition transactions that will have the "Accounting date" populated according to how the Accounting Period setup was populated within the rule.

How to update the Accounting Dates on revenue recognition transaction(s)

1. To update the accounting date on one revenue recognition transaction, drill into a revenue recognition transaction ([Drill into Project]> Recognition > Recognition transactions) and manually update the accounting date field.
2. To update the accounting date on revenue recognition dates in bulk across a project, drill into a project and navigate to the revenue recognition transactions tab. Select the checkboxes next to the charges that need to be updated, click the run-an-action icon, select the "Change the Accounting Date to" item and select the appropriate accounting period. Click "OK" and all the selected recognition transactions will be updated in bulk.

How to automatically populate the Accounting Date on timesheets, time entries, envelopes, receipts and invoices

In addition to being able to populate an entity's accounting date manually, users can also arrange to have the accounting date populated automatically at a given time (such as transaction creation) and with a given date.

Navigate to Administration > Global Settings > Organization > Accounting dates to set up the automatic population of accounting date for the following transactions:

1. Timesheets
2. Time entries
3. Envelopes
4. Receipts
5. Invoices

Note: The automatic population of accounting date for charges and revenue recognition transactions can be setup within the billing and revenue recognition rules.

The selections available in the drop-downs for the Accounting date setups will vary according to the entity that is being setup. For example, the following options are available under the "Event" field for timesheets and will determine when to populate the accounting date for timesheets:

6. Timesheet is created
7. Timesheet is submitted
8. Timesheet is approved

The following options are available for what date to use in populating the accounting date for timesheets:

9. Timesheet start date
10. Date timesheet is created
11. Date timesheet is submitted
12. Date timesheet is approved
13. Custom date
14. Custom accounting period

The drop-down values are similar to the above for time entries, envelopes, receipts and invoices (and can all be found under Administration > Accounting dates).

After these settings are populated and saved, the accounting dates for these transactions will be populated automatically according to these settings to determine when the accounting date is populated, and with what date. Any accounting date can be manually updated by drilling into the transaction itself and over-writing the accounting date.

Select alternate approvers if self-approvals occur

At times, a designated approver within an approval process may also happen to be the submitter. For example, if [Project Owner] is selected as one of the levels of approvers in an approval process and the submitter of the item happens to also be the project owner, an alternate approver can

be selected. Upon submission, the approval will be routed to the alternate approver. Alternate approvers can be selected on two levels: individual line items within an approval process or the overall approval process level.

How to select an alternate approver at the overall approval process level:

1. Users with required role privileges navigate to Administration > Global Settings > Organization > Approval processes. Click on an approval process or create a new one.
2. Under the “If approver is equal to submitter, send to” dropdown, select the alternate approver and click Save. Note: If the alternate approver is selected at the overall approval process level, any line item within the approval process that is a self-approver will be routed to the same alternate approver.

How to select an alternate approver at the individual line item within an approval process:

1. Users with required role privileges navigate to Administration > Global Settings > Organization > Approval processes. Click on an approval process or create a new one.
2. For each line item of approval, select an alternate approver under the “If approver is equal to submitter, send to” dropdown and click Save.

Preserve fields when using ‘Save and Create another’ action

Users now have the ability to preserve certain field selections when the ‘Save & Create another’ button is used on forms. This feature is particularly helpful when creating multiple entities successively – such as users, projects, or expense receipts.

For example, if 10 expense receipts need to be entered which all have the same Project and Task association, each time the ‘Save & create another’ action is used, OpenAir can be configured to pre-populate the new receipt form with information preserved from the previous receipt. Each new receipt form can have certain fields automatically pre-populated, thus saving significant time.

How to preserve field selections on the ‘Save & create another’ action:

1. Navigate to any “Create new” form which includes the ‘Save & create another’ option. Common forms where ‘Save & create another’ option is available include: User, Project, Client, Expense receipt, Booking, Booking request, etc...
2. Within the “Create new” form, scroll to the bottom and click the link to “Modify the form permissions” (found in the “Tips” section).
3. In the Form Permissions screen, scroll down to the ‘Fields which maintain value on “Save and create another”’ section.
4. Select the field(s) which should be preserved, and click “Add selected items” to add them to the “Selected” box. Click ‘Save’ to save the new form permission settings.

Note: Where applicable, if the “Task” selection needs to be preserved, the “Client: Project” field MUST also be selected.

Highlighted hover for rows

While navigating through list views and reports, the specific row that you are on is highlighted as you mouse over it. This display enhancement offers a great visual aid to help users quickly identify what row their mouse is hovering on at any moment. The highlighted rows feature appears in all list views and reports in the system.

Note: If accounts are leveraging the column lock functionality, the anchored columns will not highlight.

Streamlined approach for uploading attachments to forms

Previously, to upload an attachment to a form, the form must be initially saved. Users now have the ability to upload attachments upon initial creation without the need to first save the form. This enables users to upload attachments in a more effective manner. Users with the appropriate role privileges navigate to any “Create new” form and under the “Attachments” section, click on the “Browse” button. Select the file to upload and click Open. Click Save. This feature is available for all forms that allow for attachments.

Note: This feature is only available when leveraging the new user interface.

Reports

Subtotal and filter by “Non-billable” task checkbox

It is often necessary to distinguish between billable and non-billable work while reporting on key company metrics. The “Non-billable task” checkbox can be leveraged to indicate that a task is non-billable for billing purposes.

With this release, Summary and Advanced reports can now subtotal and filter by non-billable tasks. Any summary or advanced report containing report values that can be subtotaled by task are now available for subtotalling and filtering by “Non-billable task”.

Note: The “Allow bookings to task level” feature must be enabled in order to subtotal and filter by non-billable task in resource bookings reports. To enable booking at the task level, please send an email request to support@openair.com.

How to subtotal and filter on billable/non-billable tasks in summary reports:

1. Navigate to Reports > Summary > [select a report].
2. Configure the desired time periods.
3. Select the appropriate reporting values and select “Non-billable task” as a subtotal.
4. To filter on billable receipts, scroll down to “Filters and detail fields.”
5. Locate “Non-billable task” under “Filters” and click “Create.” A Non-billable task status pop-up window displays Available Items.
6. Select “Yes” or “No”, click “Add selected items” and click OK.
7. Click Run the report.

Subtotal and filter by “Billable receipt” checkbox

To identify the true costs of a project, it is beneficial to be able to distinguish between billable and non-billable costs. When users select the “Billable receipt” check box on the Receipt form, reports can be run to individually capture those billable and non-billable expenses. Leveraging this information gives insight into actual expense costs vs. reimbursement and helps eliminate revenue leaks to improve profitability.

Summary reports can now subtotal and filter by billable receipts. Any summary report containing report values that can be subtotaled by receipt are available for subtotalling and filtering by “Billable receipt”. In addition, the receipt detail report can now filter and subtotal on billable receipts.

Note: The account setting “Allow non-billable receipts” must be enabled to leverage this feature. To enable the feature, administrators navigate to Administration > application Settings > Expenses Settings > Other Settings. Select the option “Allow non-billable receipts” and click Save.

How to subtotal and filter on billable receipts in summary reports:

- Navigate to Reports > Summary > [select a report].
- Configure the desired time periods.
- Select the appropriate reporting values and select “Billable receipt” as a subtotal.
- To filter on billable receipts, scroll down to “Filters and detail fields.”
- Locate “Billable receipt” under “Filters” and click “Create.” A Billable receipt status pop-up window displays Available Items.
- Select “Yes” or “No”, click “Add selected items” and click OK.
- Click Run the report.

How to filter on billable receipts in a Receipt detail report:

1. Navigate to Reports > Detail > Expenses > Receipts.
2. Configure the desired Date ranges.
3. In the Report layout, select the appropriate report values and under the “Billable receipt filter”, select either “Yes” or “No”. Click OK.
4. Click Run the report.

Additional option in Advanced Leave accrual summary report

Previously, time off could be projected to be accrued and drawn-down in the future based on approved schedule requests or unapproved/submitted timesheets. In this release, we added a new option for open timesheets to be included in the projections. This enhancement allows users to account for any time that has been logged but not yet submitted, and therefore is not included in the draw-down.

How to select new option in the Advanced Leave accrual summary report:

1. Navigate to Reports > Advanced > Timesheets > Leave accrual summary.
2. Select a pre-defined date range (or select "Custom" as the date range, and enter start and end dates in the fields provided).
3. Select "Include projected leave accrual transactions" and "Include open timesheets".
4. Configure any necessary filters and Run the report.

Note: If the option "Include projected transactions" is unchecked while another selection is checked, that selection will automatically uncheck as well. Additionally, if one of the projection options is checked, the "Include projected transactions" option will automatically be checked as well.

Projects

Divide assigned hours evenly among assignment group members

Previously, for accounts that leveraged the feature "Input planned hours for each user assigned to a task", the assigned hours entered on a task were multiplied by each member of the assignment group. For example, if there were 5 members of an assignment group that was assigned to the task and the assigned hours were 100, the total number of planned hours of the task would be 500, with each member assigned to 100 hours.

A 'Divide hours' option has now been added for each task assignment row. With this new feature, users have the option to divide the total number of assigned hours on a task evenly among members of an assignment group (if assigned). Thus, using the example above, the 100 assigned hours would be divided evenly among the 5 members of the assignment group, with each member assigned to work 20 hours on the task.

To enable the Input planned hours for each user feature, please send an email request to support@openair.com.

How to divide assigned hours among members of an assignment group:

1. Select a specific project > Phases/Tasks > Outline view.
2. Select a task and under the "Assignments" section, select an assignment group to assign. By default the "Divide hours" checkbox will remain read-only unless an assignment group is assigned.
3. Check the "Divide hours" box and click Save.

Note: The individual assigned hours are recalculated if a user is added or removed from the assignment group. Additionally, the number of hours divided will round to the nearest 2 decimals if the number of hours does not divide evenly among members.

Add Project Owner to Task List Advanced filter

Users now have the ability to include the Project Owner as an available field when configuring an Advanced filter for the Task List view. Users with required role privileges navigate to Projects > Tasks > Pending tasks. The Advanced filter dropdown is at the upper left of the list and defaults to "no filter". Select to create/edit a filter. Select "Project Owner" from the dropdown and choose the appropriate parameter definition. Optionally, input the project owner name in the field in the third column and click Save.

Timesheets

Time entries unrelated to an approver's projects grayed out

Many accounts have the setting "Project approvers can view all time entries" enabled to allow their timesheet approvers to see all time entries submitted by the user. As a result, the timesheet report view may contain a large amount of data, including many time entries unrelated to projects individual approvers are responsible for approving or rejecting.

With this enhancement, timesheet line items that are not associated with the specific projects the approver is responsible for will automatically be grayed out in the timesheet report view. This feature will further streamline the approval process while still providing visibility into all time logged by the user.

Expenses

Lock columns on the Expense Grid

Administrators can now lock up to 4 columns on the Expense Grid for all users. This feature allows users to keep certain columns visible, while scrolling horizontally for data entry in other columns. The number selected for locking will determine which column(s) are maintained within view. For example, the first three columns displayed in the expense grid are Tracking #, Description, and Date. If users choose to lock the first 2 columns in the expense grid view, Tracking # and Description will remain locked while scrolling left to right.

How to lock columns on Expense Grid:

1. Navigate to Administration > Application Settings > Expenses Settings > Other Settings.
2. Scroll down to the "Lock expense worksheet columns during horizontal scroll" section.
3. Select the column number from the dropdown list, then click 'Save'. The maximum number of columns available for locking is 4.

Invoices

New default tab for Invoices

The Invoices module has two main tabs: Invoices and Charges. In the past, the default landing page when accessing the Invoices module was the Charges tab. System Administrators can now optionally choose which tab serves as the default landing page when users navigate to the Invoices module.

How to change the default landing page in the Invoices module:

1. Navigate to Administration > Application Settings > Invoices Settings > Other Settings.
2. Under the "Invoices tab defaults to list of" dropdown, select either "Charges" or "Invoices."
3. Once the setting is saved, all users in the account will now default to the appropriate tab when accessing the Invoices module.