OpenAir

Administrator Guide

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Table of Contents

Introduction

Overview

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

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

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

Configuring OpenAir Settings

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

Internal Settings

Many internal settings are set by OpenAir Professional Services when your OpenAir account is configured. Later, as you become aware of new functionality through release updates, you can Creating a Support Case and request that an internal setting be enabled in your account. Generally, these requests relate to new features. When a new feature is enabled, you must log out of your OpenAir account and then log back in to see the new feature.

Company Settings

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

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

Account Integration Settings

OpenAir integrations are available for several software programs. If not set up initially when your OpenAir account is configured, you should contact your OpenAir account manager or OpenAir Professional Services to discuss implementation. Frequently, you may want assistance in the initial configuration. Integrations include:

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

OpenAir offers a desktop XML API tool titled OpenAir Integration Manager. It enables you to import and export from and to CSV text files.

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

Multiple Sessions

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

Terminology

You can customize all terminology in OpenAir to meet the unique needs of your company. For example, one company may use the word project to describe work to be accomplished. Another company may call it a case, job, or assignment. Please keep this in mind as you review the contents of this document. For more information about customizing terminology, see Interface: Terminology in Administration – Global Settings.

Application Overview

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

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

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

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

Opportunities Application — The Opportunities 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. Many current OpenAir companies now use the OpenAir/NetSuite integration for this functionality. See Opportunities or contact OpenAir Customer Support and request information about the OpenAir/NetSuite integration.

Projects Application — The Projects application is one of the primary components within OpenAir. This is the application where management of your company's projects takes place. The application is flexible and provides several features to address your company's needs. See Projects.

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

Invoices Application — The Invoices 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 that you can set up for projects in the Projects application. See Invoices and Projects.

Timesheets Application — The Timesheets application is where employees record their time against customer or internal projects. See Timesheets.

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

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

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

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

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

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

Log Out

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

OpenAir Account Types

The following types of OpenAir account are available:

- **Production account** — Your OpenAir production account is where you perform your daily business activities. Most users spend most of their time working in the production account.
- **Release preview account** — Your OpenAir release preview account is a temporary test account that is running the new version of OpenAir software. It is available for a short period before your production account is upgraded to a new OpenAir release. Your release preview account is created automatically using a recent copy of your production account data.

  You can use the release preview account to:

  - Become familiar with the new features and other changes in the upcoming OpenAir release.
  - Verify that your existing business workflows function as expected before your production account is upgraded to the new OpenAir release.

  For more information, see the help topic Release Preview Guide.
- **Sandbox account** — An OpenAir sandbox account is an entirely separate instance of OpenAir from your production account where you can develop new processes, customizations and integrations. You can use a sandbox account to test and train your employees in existing integrations and processes without affecting your production account data. The data in the sandbox account is a copy of your production account data. The sandbox account can be refreshed to bring in new data from your production account. Each refresh overwrites the previous sandbox account. You can purchase one or several sandbox accounts to allow for development and testing teams to have their own accounts in which to experiment.

  During the upgrade period for a new release of OpenAir, sandbox accounts are upgraded to the new version several weeks before your production account is upgraded to the new version. You should use your sandbox account to test new features and other changes in the upcoming OpenAir release in addition to testing in your release preview account. Sandbox accounts have fewer limitations than release preview account.

  For more information, see OpenAir Sandbox.

The sign-in page you use to access OpenAir is different for each type of OpenAir account. The address bar of your browser shows a different URL after you sign in, depending on the type of OpenAir account you signed in to. For more information, see Your OpenAir Account URLs.

OpenAir Sandbox

An OpenAir sandbox account is an entirely separate instance of OpenAir from your production account in which you can develop new processes, customizations and integrations. You can use a sandbox account to test and to train your employees in existing integrations and processes without affecting your production account data. The data in the sandbox account is a copy of your production account data at the time the sandbox was created. Each sandbox account can be refreshed to bring in new data from your production account. Each refresh overwrites the previous sandbox account. You can purchase one or several sandbox accounts to allow for development and testing teams to have their own accounts in which to experiment.

Sandbox accounts provide ideal places for:

- Testing customization elements and integrations before deployment.
- Fixing issues with existing customizations.
- Trying out new features.
- Developing training material, and training employees in existing and new business practices in an account identical to your production account.

Actions you take in sandbox accounts have no effect on your OpenAir production account. You can feel free to make changes in a sandbox account without altering your production data.

> **Important:** OpenAir add-on services, OpenAir API and OpenAir platform and integration features let you exchange data with external systems. Make sure you connect your OpenAir sandbox account only with other systems in a sandbox environment. Connecting your OpenAir sandbox account with any systems in a production environment could result in a loss of data integrity.

> **Note:** For more information about acquiring one or more sandbox accounts, contact your OpenAir account manager. A sandbox account is created shortly after you purchase a license for a sandbox.

General Guidelines about Sandbox Accounts

Review the following guidelines:

- To distinguish a sandbox account from your production account, look out for the following:
  - The domain part of the URL in the address bar of your browser indicates the type of account. The account-specific domain for a sandbox account is `<company-id>.app.sandbox.openair.com/`, where `<company-id>` is a unique account identifier which is typically assigned based on the Company ID for your sandbox account.
  - The OpenAir UI for your sandbox includes the following mention immediately below the page header: `This is a copy of <source-account>. It was created at <created>`, where `<source-account>` is the Company ID for the account where the data was copied from, and `<created>` is the date and time in the Eastern Time (UTC–5) time zone when the sandbox account was created or refreshed.
- The Company ID for your sandbox account is assigned at the time of purchase. You can change the **Company ID** at any time (Administration > Global Settings > Organization > Name & Address).
- The unique account identifier part of the account-specific domain for your sandbox account is assigned based on the Company ID at the time the account is created. It can be changed upon request. To change your account-specific domain, contact OpenAir Customer Support. The new account identifier `<company-id>` must be unique and include only allowed URL characters.
- By default, all active employees and guest users accessing your OpenAir production account using an OpenAir user ID and password can access the sandbox account using the same user ID and password. To prevent these employees and guest users from accessing the sandbox account, inactivate them in your sandbox account. Action is required to ensure that active employees using single sign-on to access your OpenAir production account can access your sandbox account. See Actions Required after Sandbox Creation or Refresh.
- Your sandbox account is an exact copy of the source account at a given date and time. It is not possible to pick and choose what data or configuration settings are copied across from the source account to the target sandbox account. It is not possible to specify the exact time when the source account snapshot should be taken. The snapshot is taken when the sandbox creation task starts, which depends on several factors including account size, server load, and other sandbox refreshes pending in the queue.
- Your sandbox account can be refreshed using your production account data on demand within your license limits. See Refreshing Sandbox Accounts.
- You can enable optional features for your sandbox account in the same way you enable optional features for your production account by contacting OpenAir Customer Support. Any features that are enabled on your sandbox account but not on your production account will be cleared when your sandbox account is refreshed.

- Each add-on service license covers both your sandbox and production accounts. If a feature is part of a licensed add-on service that you have purchased for your production account, you can enable it on your sandbox account too.
- Functionality availability in your sandbox account is subject to some limitations. Action may be required to ensure the functionality is available after a sandbox is created or refreshed. For more information, see Features Available for Testing in a Sandbox and Actions Required after Sandbox Creation or Refresh.

When a Sandbox Account Expires

Licenses for sandbox accounts have expiration dates. Your sandbox account is canceled when the license for your sandbox expires. Your sandbox account data is deleted from all live and non-live environments six months after the sandbox account cancellation date.

Note: Contact your OpenAir account manager to renew your account before it expires.

Features Available for Testing in a Sandbox

Many OpenAir features are available for testing in sandbox accounts. Some features are only available in a limited form in sandbox accounts, and a few behind-the-scenes tasks that run in your production account do not run in your sandbox account. See the following for details about features in sandbox accounts:

- Features Available for Limited Testing in Sandbox Accounts
- Features Not Available for Testing in Sandbox Accounts

When your sandbox account is created or refreshed, not all features enabled in your production account are enabled in your sandbox account. Some features can be enabled for your sandbox account on request, and other functionality require action on your part before they can be used in your sandbox account. For more information, see Actions Required after Sandbox Creation or Refresh.

During sandbox creation and refreshes, certain objects are not copied from your production account. For more information, see Data That is Not Copied from Production to Sandbox.

Features Available for Limited Testing in Sandbox Accounts

The following features are only available in a limited form in sandbox accounts:

Note: Omission from the following table does not guarantee availability.

Feature	Testing Notes
Attachments	Attachment files are not copied from your production account to the sandbox account. Attempting to download an attachment results in a "Page not found" unless the attachment was added after the sandbox account was created or refreshed.
Attachment Thumbnail	Attachment files and attachment thumbnail files are not copied from your production account to the sandbox account. Attachment thumbnails will not show in forms and list views unless they were added after the sandbox account was created or refreshed.
Attachment Viewer	Attachment files and attachment thumbnail files are not copied from your production account to the sandbox account. You cannot preview attachment files in the attachment viewer unless they were added after the sandbox account was created or refreshed.

Feature	Testing Notes
Workspace documents	See *Attachments*.

Features Not Available for Testing in Sandbox Accounts

The following features are not available for testing in sandbox accounts.

Note: Omission from the following table does not guarantee availability.

Feature	Testing Notes
American Express Integration	You should not test the American Express integration in a sandbox account. If testing is required, test the functionality for a small set of users in your production account.
Daily Foreign Currency Exchange Rate Updates	Foreign exchange rates are not updated on sandbox accounts. To update the exchange rate in your sandbox account you can request a sandbox refresh or update the exchange rates manually. If you are using the OpenAir <> NetSuite integration between your OpenAir and NetSuite integration account, you can use the exchange rate integration to update the foreign exchange rates in your OpenAir sandbox account with the latest information from your NetSuite sandbox account. For more information about foreign currency exchange rates in OpenAir, see Viewing Exchange Rates.
Forgot your password or ID?	The Forgot your password or ID functionality is not supported on the login page for your sandbox account. Users must contact an account administrator to get a reminder of their User ID or password hint.
Security Questions – Reset your password or unlock your user account	The Security Questions feature and the Reset your password or unlock your user account functionality are not supported on the login page for your sandbox account. Users must contact an account administrator to reset their password. If no account administrators can access the sandbox account, you can request a sandbox refresh.

Actions Required after Sandbox Creation or Refresh

A sandbox account is a copy of your production account. However, not all features enabled in your production account are enabled in your sandbox account when it is created or refreshed. In particular, behind-the-scenes tasks that run in your production account by default do not run in your sandbox account. The following table lists some of the actions required to use specific functionality in your sandbox account.

Important: During sandbox creation and refreshes, certain objects are not copied from your production account. For more information, see Data That is Not Copied from Production to Sandbox.

Omission from the following table does not guarantee full availability.

Feature	Actions Required	Notes
SAML Single Sign-On	1. Deploy SAML single sign-on. See the help topic Deploying SAML Single Sign-On on Your OpenAir Account. 2. Enable employees to access the sandbox account using SAML single sign-on. If the **SAML Authentication** [saml_auth] box	▪ SAML identity provider profiles are not copied from your production account to the sandbox account. ▪ By default, SAML single sign-on access is removed for all users when the sandbox account is created or refreshed, even if the SAML Authentication [saml_auth]

Feature	Actions Required	Notes
	is checked, clear the box, save the form, then check the box and save the form again. See the help topic Enabling Employees to Login Using SAML Single Sign-On. **Tip:** You can use the bulk employee change wizard to copy the value of the `saml_auth` field to other user records on your OpenAir Account. See OpenAir Administrator Guide under Home > Home > Wizards > Making Changes to Multiple Employee Records at the Same Time.	box is checked on the sandbox account. This lets you control who can access your sandbox account using SAML single sign-on. You may want to enable SAML single sign-on access for the same users in both your production and sandbox accounts or enable it only for selected users. ▪ Make sure you keep SAML Authentication disabled for at least one administrator account for troubleshooting and configuration purposes.
Two-Factor Authentication (2FA)	If you require users to sign in to your sandbox account using 2FA, you need to enroll them after each sandbox refresh. See Enroll or disenroll users to sign in using 2FA. Enrolled users will be asked to setup 2FA on the next sign-in.	The following user information is not copied from your production account to the sandbox account: **Two-factor authentication required** demographic setting, the **2FA required**, **2FA status**, **Complete 2FA setup by** date information shown on the employees list view, user 2FA setup (authenticator app) information.
OpenAir Business Intelligence Connector (OData Service)	Enable OpenAir Business Intelligence Connector. To do so, contact OpenAir Customer Support.	▪ The feature is turned off by default in your sandbox account, even if it is enabled in the source account. ▪ This feature is a licensed add-on service. If you have purchased it for your production account, you can enable it on your sandbox account too. ▪ Published reports in your production OData feed are not copied across to the sandbox OData feed. To test access to published report in your sandbox account, you must publish the reports to the sandbox OpenAir OData Service in your sandbox account.
API Integration Applications (OAuth 2.0)	Create the application profiles again in your sandbox account for all integration applications using the OAuth 2.0 feature that you want to test. See Managing API Integration Applications in OpenAir Users testing the integrations will need to authorize applications explicitly in the sandbox account. For more	Application profiles for integration applications using the OAuth 2.0 feature to connect to your OpenAir production account are copied to your sandbox account. However, these cannot be used to test integration applications using the OAuth 2.0 feature in your sandbox account.

Feature	Actions Required	Notes
	information about OAuth 2.0 Authorized Applications. See the help topic Authorized Applications.	
OpenAir NetSuite Connector	1. If you are enabling the integration between OpenAir and NetSuite sandbox accounts for the first time, additional set up may be required in your NetSuite sandbox account. See the help topic Configuring NetSuite for the Integration. 2. Replace the credentials for your NetSuite production account with those for a NetSuite sandbox account. See the help topic Connecting OpenAir to NetSuite for the Integration. 3. Activate again any scheduled integration runs you want to test in your sandbox account. If the **Active** switch is ON, toggle it OFF, save the form, then toggle it ON and save the form again. See the help topic Scheduling the Integration to Run Automatically.	■ OpenAir NetSuite Connector settings are copied from your production account to your sandbox account. ■ To avoid any integration conflicts and data corruption on your NetSuite production account, enter the credentials of a NetSuite sandbox account in Administration > NetSuite Connector > Credentials.
Notifications and Alerts – Email	1. To avoid any confusion, change the email address for most or all employees to a generic email address. 2. Enable the trigger for email notifications on your sandbox account. To do so, contact OpenAir Customer Support. 3. Activate again any custom notifications you want to test in your sandbox account. If the **Active notification** box is checked, clear the box, save the form, then check the box and save the form again. See Setting Up Custom Email Notifications.	■ Alerts and notifications sent from both your production and sandbox accounts may cause unnecessary confusion for users. Consider the impact of enabling the trigger for email notifications and alerts, and take remedial steps to ensure that users do not receive email messages from your sandbox account. ■ For more information about Notifications, see Notifications. Please note that setting **Forward the undeliverable email to this email address** under **Administration** > **Global Settings** > **Email Settings** should be blank so undelivered emails are not forwarded further.
Scheduled Events: ■ OpenAir NetSuite Connector – Scheduled integration runs ■ OpenAir NetSuite Connector – Exchange rate integration ■ User Scripting – Scheduled scripts ■ Automatic Backup Service ■ Scheduled reports (See the help topics Configuring	1. To enable triggers for a scheduled event, contact OpenAir Customer Support. 2. Go to form corresponding to the scheduled event you want to test, change the scheduled event configuration and save the form. When enabling the triggers for User Scripting – Scheduled scripts, deploy again any scheduled scripts you want to test in your sandbox account. If	Scheduled events are behind-the-scenes tasks that run automatically in your production account. These tasks do not run in your sandbox account by default. Scheduled event are launched by triggers. Trigger information is not copied across from the production account during sandbox creation or refresh. To create the trigger again, schedule the event again by going to the corresponding form, changing the

Feature	Actions Required	Notes

OpenAir to Run and Deliver a Report Automatically and Configuring OpenAir to Publish Reports Automatically and Refresh Published Reports Periodically)
- Daily resource utilization calculation
- Transactional budget calculation
- Leave accrual calculation (See Run Leave Accruals)
- Automated billing (See Auto-Billing)
- Automated revenue recognition (See Running Revenue Recognition Automatically)
- Charge and revenue projections (See Charge Projections)
- Delayed approval routing (**Assign after** `<number>` **days** – See Approval Processes)
- Alerts
  - Late approval alerts
  - Overdue authorization approval alerts
  - Overdue expense report approval alerts
  - Transactional budget alerts
  - Daily resource utilization alerts
  - Late timesheet alerts
  - Unsaved time entry alerts
  - Account storage alerts
	the scheduled script shows as Deployed, undeploy it first and deploy it again. See the help topic Deploying Scheduled Scripts.	scheduled event configuration and saving the form.

Data That is Not Copied from Production to Sandbox

When a sandbox account is created or refreshed, the following information is not copied from your production account:

- **Attachments and workspace documents**

  The attachment or document files are not copied from your production account to the sandbox account. Only the attachment or document metadata is copied across.

- **Triggers**

  Automated tasks running behind-the-scenes on your production account are launched by triggers. Trigger information is not copied across from the production account during sandbox creation or refresh. To test these automated tasks on your sandbox account, you must enable the automated tasks and schedule them again by going to the corresponding form, changing the scheduled event configuration and saving the form. See Actions Required after Sandbox Creation or Refresh.

- **SAML identity provider profiles**

  SAML identity provider profiles are not copied from your production account to the sandbox account. You must deploy SAML single sign-on on your sandbox account if required for testing or authentication. See Actions Required after Sandbox Creation or Refresh.

- **Two-factor authentication (2FA) user settings and setup**

  The following user information is not copied from your production account to the sandbox account: **Two-factor authentication required** demographic setting, the **2FA required**, **2FA status**, **Complete 2FA setup by** date information shown on the employees list view, user 2FA setup (authenticator app) information. You need to enroll users to sign in using 2FA and users will need to repeat the 2FA setup after each sandbox refresh, if required.

- **Reports published in OpenAir OData service (OpenAir Business Intelligence Connector)**

  By default, the OpenAir Business Intelligence Connector feature (OData service) is never enabled for your sandbox account when the account is created or refreshed. Published reports in your production OData feed are not copied across to the sandbox OData feed. To test access to published report in your sandbox account, you must enable the feature for your sandbox and publish the reports to the sandbox OpenAir OData Service in your sandbox account. See Actions Required after Sandbox Creation or Refresh.

> **Note:** Auditing information is copied across from your production account to your sandbox account. This includes audit trail fields, web services log reports, OpenAir NetSuite Connector status logs, user scripting logs. Review the following guidelines:
>
> - **Audit trail fields** — The audit trail information recorded for every change to the record includes the internal ID for your OpenAir account (`db_id`). This `db_id` is different for your production account and your sandbox account. You can use this information to identify the changes that were made in your production account, and those that were made in your sandbox account after it was created or refreshed.
> - **Web services log reports** — The reports show the web services requests made in your production account before the sandbox was created or refreshed and in your sandbox account after it was created or refreshed. Links to view the request and response for web services requests made in your production account do not work when viewing the report in your sandbox account.

Refreshing Sandbox Accounts

Each of your sandbox accounts can be refreshed from your production account upon your request.

Note: The account where the data is copied from is referred to as the source account. The sandbox account that is created or refreshed with a copy of the data from the source account is referred to as the target account.

Typically, the source account is your production account. In some cases, the source account can be another sandbox account. If you hold valid licenses for more than one sandbox accounts, and can provide a business justification to support your request, you can refresh a sandbox account from another sandbox account. You must specify the Company ID for both source and target sandbox accounts.

Review the following guidelines before requesting a refresh:

- Refreshing a sandbox account replaces all configuration settings, all data, all user passwords, and all customizations in the target account with those from the source account. Any changes you made to the target sandbox account before the refresh are overwritten.
- When refreshing a sandbox account, the target sandbox account is deleted and replaced with a copy of the source account. After the refresh starts, all the data previously held in the target sandbox account is lost and cannot be recovered.
- Any features that are enabled on your sandbox account but not on your production account are cleared when your sandbox account is refreshed.
- The sandbox refresh process starts after OpenAir Customer Support acknowledges and accepts your request. You cannot access your sandbox account while the sandbox refresh process is under way.
- The company ID and account specific domain for the target account are the same before and after the refresh unless you specify otherwise at the time of requesting the refresh.
- Refreshing a sandbox account can take anything from a few hours up to 72 hours to complete. The delay depends on several factors including account size, server load, and other sandbox refreshes pending in the queue.
- The number of sandbox refreshes is limited to one per month. To increase the limit to one per week, contact your OpenAir account manager.
- Functionality availability in your sandbox account is subject to some limitations. Action may be required to ensure the functionality is available after a sandbox is created or refreshed. For more information, see Features Available for Testing in a Sandbox.

To request a sandbox refresh:

1. Create a support case. See Creating a Support Case. Use the following values when filling the Create Case form:
   - **What would you like to do?** – Ask a Question
   - **Case Severity** – C3 – How To / Non Urgent Questions
   - **Subject** – Sandbox refresh
   - **Question** – Sandbox account to be refreshed: <sandbox_id>

> **Note:** Specify the Company ID (<sandbox_id>) for the sandbox account you want to refresh (target account).
>
> If you want to refresh a sandbox account with data from another sandbox account, provide also the following information:
>
> - The Company ID (<source_sandbox_id>) for the source sandbox accounts.
> - Business justification.
>
> By default, some functionality running in the source account or target account before the refresh does not run in the target sandbox account after the refresh. You can include a list of the functionality that you want to enable for your target sandbox account when you request the sandbox refresh or you can create a new support case to enable the functionality after your sandbox is refreshed. Further actions may be required to ensure that the functionality is available and operational in your sandbox account after the refresh. For more information, see Actions Required after Sandbox Creation or Refresh.

2. OpenAir Customer Support will contact you to acknowledge your request and will proceed with the sandbox refresh.

   OpenAir Customer Support will contact you again when the sandbox refresh is completed.

> **Warning:** Your refresh request cannot be canceled or otherwise modified in any way after it has been acknowledged and accepted.
>
> You cannot access the target sandbox account while the refresh is under way.
>
> The new sandbox completely replaces the previous sandbox. The new sandbox contains a copy of account data that is a snapshot taken from your chosen source account at the time of the sandbox refresh. All the data previously held in the target sandbox account is lost and cannot be recovered.
>
> If you want to retain any changes made in your sandbox account before the refresh, save these changes outside of the sandbox account so that they are available to be added to the new sandbox after the refresh. Account administrators should formulate a strategy to save any changes made in the previous sandbox and add them to the new sandbox, and inform users of the processes to be used.

OpenAir Sandbox FAQ

See the following for answers to common questions about OpenAir sandboxes.

How can I differentiate between my production and sandbox accounts?

To distinguish a sandbox account from your production account, look out for the following:

- The domain part of the URL in the address bar of your browser indicates the type of account. The account-specific domain for a sandbox account is `<company-id>.app.sandbox.openair.com/`, where `<company-id>` is a unique account identifier which is typically assigned based on the Company ID for your sandbox account.
- The OpenAir UI for your sandbox includes the following mention immediately below the page header: `This is a copy of <source-account>. It was created at <created>`, where `<source-account>` is the Company ID for the account where the data was copied from, and `<created>` is the date and time in the Eastern Time (UTC–5) time zone when the sandbox account was created or refreshed.

What features can I test in a sandbox?

Many OpenAir features can be tested in sandbox accounts. For more information, see Features Available for Testing in a Sandbox.

About Sandbox Refreshes

The following questions and answers are specific to refreshing your sandbox.

Can I specify a date and time for the sandbox refresh?

Refreshing a sandbox account involves deleting the sandbox account and creating a new sandbox account. You can specify when you would like the sandbox refresh process to be initiated. However, you cannot specify exactly when the snapshot of your production account will be taken and the creation of your sandbox account will start. Various factors determine when the new sandbox creation will start and when the snapshot of your production account will be taken, including the time it takes to delete the existing sandbox, size of your production account (the amount of data), current loads on the OpenAir servers, and the number of customers requesting a new sandbox or a sandbox refresh during the same time window.

How long does it take for my sandbox to be refreshed?

Refreshing a sandbox account can take anything from a few hours up to 72 hours to complete. Various factors determine how long it takes to refresh your sandbox, including the size of your production account (the amount of data), current loads on the OpenAir servers, and the number of customers requesting a new sandbox or a sandbox refresh during the same time window.

Can I cancel my sandbox refresh request?

It is not possible to cancel a refresh request.

A refresh completely replaces the content of the sandbox account with the content of the production account. After your sandbox account has been refreshed from production, it cannot be restored to its prior state. Before submitting a request to refresh a sandbox account, please ensure that your company is fully notified and ready for the refresh from production. Your refresh request cannot be canceled or otherwise modified in any way after it has been acknowledged and accepted. See Refreshing Sandbox Accounts.

Is there a limit to the number of sandbox refreshes.

The number of sandbox refreshes is limited to one per month. To increase the limit to one per week, contact your OpenAir account manager.

I have some important data I want to keep in my sandbox. Can my data be saved during the next refresh?

A sandbox is not intended for storage of data. A refresh completely replaces the content of the sandbox account with the content of the production account snapshot. Any data that exists in a sandbox before a refresh is requested is overwritten by the refresh. See Refreshing Sandbox Accounts.

What happens to my sandbox during a OpenAir version upgrade?

All sandbox accounts are upgraded typically three weeks before the production upgrade. Accounts are unavailable during the upgrade, which typically takes several hours.

OpenAir Account Identifiers and URLs

Each OpenAir account has the following unique identifiers.

- **Company ID** – This is the unique identifier for your company’s OpenAir account. Account users enter the company ID on the OpenAir sign in page when signing in. You can change the Company ID in Administration > Global Settings > Organization > Name & Address. For more information, see the help topics Signing In to OpenAir and Name & Address.
- **Account- specific domain name** – Your OpenAir account URL includes a unique domain name that is specific to your account. Your account-specific domain name includes a unique account identifier `<company-id>` which is typically assigned based on the Company ID for your account and identifies the type of OpenAir account. See Your OpenAir Account URLs.
- **Database ID** (`db_id` or **Account No**) – This is the unique internal ID for your company's OpenAir account. You may need to reference the database ID when contacting OpenAir Customer Support or setting up certain OpenAir <> NetSuite integration features. See Finding the Database ID for Your OpenAir Account.

Finding the Database ID for Your OpenAir Account

You may need to reference the database ID when contacting OpenAir Customer Support or setting up some of the OpenAir <> NetSuite integration features in NetSuite.

The following steps describe one way to find out the database ID for your OpenAir account.

> **Note:** Audit trail information also includes the database ID for your OpenAir account (`db_id` or **Account No**). For more information, see help topics under Configuring and Using Auditing features.

To find out the database ID for your OpenAir account:

1. In OpenAir, click your avatar in the upper right corner.

   The User Center menu appears.
2. Click **Support**.

   The Support page appears.
3. Click the link under the **Explore SuiteAnswers** button (*If SuiteAnswers is unavailable and you need to contact Support, click here*).

   A window appears.
4. Scroll down to the end of the page to find your database ID (account ID).

Your OpenAir Account URLs

The sign-in page you use to access OpenAir is different for each type of OpenAir account. For more information about signing in to OpenAir using an OpenAir password or single sign-on, see the help topic Signing In to OpenAir.

The address bar of your browser shows a different URL after you sign in, depending on the type of OpenAir account you signed in to. Your OpenAir account URL includes a domain name that is specific to your account.

The following table lists the sign-in page and account-specific domain name format for each type of OpenAir account. The account-specific domain name includes a unique account identifier `<company-id>` which is typically assigned based on the Company ID for your account.

Account Type	Login Page	Account Specific Domain
Production	`https://auth.openair.com/login`	`<company-id>.app.openair.com/`
Release preview	`https://auth.preview.openair.com/login`	`<company-id>.app.preview.openair.com/`
Sandbox	`https://auth.sandbox.openair.com/login`	`<company-id>.app.sandbox.openair.com/`

The URL for OpenAir services includes the domain for your OpenAir account `<account-domain>`. It may also include the specific path for the OpenAir service you are accessing `<service-path>`. The URL must start with `https://` — a secure communication protocol is required.

`https://<account-domain>/<service-path>`

The following table lists URLs used for account integrations and add-on services. The table includes links to help topics for more information. Follow the links for instructions about connecting to your OpenAir account.

> **Important:** Use your account-specific domain to access all OpenAir services. With effect from 2023.1, integrations and add-on services can no longer access OpenAir using generic domain names such as `www.openair.com` for production accounts.

Integration / Service	URL	More information
OData feed — reports OData feed — list views	`https://<account-domain>/odata/v4/reports/` `https://<account-domain>/odata/v4/listviews/`	▪ Connecting BI Tools to Your OpenAir OData Feed ▪ Topics under OpenAir Business Intelligence Connector Advanced Functions
REST API requests	`https://<account-domain>/rest/v1`	Request Format
SOAP API requests	`https://<account-domain>/soap`	Step 6 — Connect your Application to OpenAir API
XML API requests	`https://<account-domain>/api.pl`	Step 6 — Connect your Application to OpenAir API
OpenAir NetSuite as OIDC Provider integration	`https//<account-domain>/oidc/callback/internal_netsuite_<netsuite_account_id>` where `<netsuite_account_id>` is your NetSuite Account ID	Enabling Access to OpenAir From Within NetSuite
Data Dictionary	`https://<account-domain>/database/single_user.html`	Go to OpenAir Data Dictionary
OpenAir WSDL (generic)	▪ Production – `https://app.openair.com/wsdl.pl` ▪ Sandbox – `https://app.sandbox.openair.com/wsdl.pl`	XML Schema and WSDL Definition Documents
Exchange Integration Manager	`https://<account-domain>`	Connecting OpenAir Exchange Manager with your OpenAir account.
Integration Manager Integration Manager shortcuts	`https://<account-domain>`	▪ Connecting OpenAir Integration Manager with your OpenAir Account ▪ Editing OpenAir Integration Manager Shortcuts

Integration / Service	URL	More information
OffLine	`https://<account-domain>`	Downloading Account Information
OpenAir Outlook Connector	`https://<account-domain>`	Instructions similar to Outlook Project Connector
OpenAir Project Connector	`https://<account-domain>`	Account Settings

Note: You do not need to update the connection settings when using the following applications and versions:

- OpenAir Mobile 2.3.2 (Android), 2.6.7 (iPhone) and later versions.
- OpenAir Integration Manager 7.0 and later versions.

Getting Help

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

The following resources are available:

Documentation Resources

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

Additional Resources

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

OpenAir Documentation Overview

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

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

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

OpenAir Basics

The following guides are useful references for all OpenAir users:

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

Account Administration

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

Administrator Guide	The guide describes OpenAir features and procedures as well as configuration settings. It is a reference guide for administrators and users with delegated role permissions responsible for setting up and maintaining an OpenAir account. OpenAir Administrator Guide
Database Guide	The guide provides a visual representation of the OpenAir database as viewed through the OpenAir SOAP API and XML API. OpenAir Database Guide
Optional Features Book	The guide lists and describes the optional features that can be enabled by OpenAir Customer Support for your account. The features described in this guide correspond to the lists of enabled feature account administrators can view in OpenAir by navigating to Administration > Global Settings > Reports > Enabled Features. OpenAir Optional Features Book
Performance Tuning Guide	The guide describes the steps a user can take to improve the responsiveness of OpenAir to their specific requests. The guide covers hardware and network-related issues, general performance issues, and application specific issues. OpenAir Performance Tuning Guide
Security Guide	This guide outlines the security features currently available for OpenAir and describes security-related controls and configuration settings. OpenAir Security Guide

Integration

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

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

	OpenAir Integration Manager Guide

Add-on Services

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

OpenAir Mobile User Guide	The guides describe how to install and use OpenAir Mobile for Android or iPhone for exchanging timesheets and expenses information between an OpenAir account and an Android device or iPhone. OpenAir Mobile User Guide
OpenAir OffLine User Guide	The guide documents the OpenAir OffLine application. OpenAir OffLine extends the convenience of your OpenAir account to your personal computer. It supports entering charges, expenses, and time on all tasks to which you are assigned. OpenAir OffLine User Guide
Projects Connector Guide	The guide documents the OpenAir Projects Connector application. OpenAir provides OpenAir Projects Connector as a tool for exchanging project plan information between OpenAir Projects and Microsoft Project. OpenAir Projects Connector Guide

Platform

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

REST API Reference Guide	The guide provides a reference for developers wanting to use OpenAir REST Web Services for the exchange of OpenAir data between the main site and peripheral programs. It describes OpenAir REST API and lists the supported methods and resource endpoints. OpenAir REST API Reference Guide
XML API and SOAP API Reference Guide	The guide provides a reference for developers wanting to use OpenAir XML API or OpenAir Web Services (SOAP API) for the exchange of OpenAir data between the main site and peripheral programs. It describes the API and lists the commands and data types available in the XML API and SOAP API. OpenAir XML API Reference Guide and OpenAir SOAP API Reference Guide
User Scripting Guide	The guide describes OpenAir User Scripting, a component of the OpenAir platform allowing you to customize OpenAir to better meet the unique needs of your business. OpenAir User Scripting | OpenAir User Scripting Reference Card

New Release Resources

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

Sneak Peeks	The Sneak Peeks are published a few weeks before an OpenAir release and provide an overview of selected new features planned for the upcoming OpenAir release.

	OpenAir Sneak Peek
Release Notes	Release Notes are published during release preview and provide overviews of new features planned for the upcoming OpenAir release. View the Release Notes for the current and past releases of OpenAir online. To view the Release Notes in OpenAir, go to the User Center menu > Support > Release Notes.
Release Preview Guide	The test plan describes the release preview process you should follow. The Release Preview environment enables you to become familiar with the new features in an upcoming release. You can verify that your existing business workflows function as expected before the upgrade to your production account. OpenAir Release Preview Guide.

OpenAir Help Center

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

The OpenAir Help Center includes:

- Online version of OpenAir product documentation.

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

- Additional resources including a platform solution catalog, catalogs of training resources available from OpenAir SuiteAnswers, a library of product documentation books available as PDF document that you can download.
- What's new section including:
  - Release notes for the latest OpenAir release.
  - A list of interim enhancements released made available since the latest OpenAir release.
  - A release notes archive. This archive includes release notes for all past OpenAir releases since September 2000.

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

  - Help Center updates.

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

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

- Support page — Click the User Center menu then Support to access the Support page. On the Support page, click **Release Notes** to view the list of enhancements in the latest OpenAir release, or click the **Help Center** link under the Documentation heading.

- Enabled Features list — Go to Administration > Global settings > Reports > Enabled features and click an entry in the Enabled Features list to view the relevant help content.
- Licenses administration page — Go to Administration > Global settings > Account > Licenses and click the **More about licenses** link.
- OpenAir NetSuite Connector Contextual Tips — Go to Administration > NetSuite Connector, and click the Tips button then **OpenAir NetSuite Connector Guide**.
- OpenAir NetSuite Connector Health Check — Go to Administration > NetSuite Connector, and click the Tips button then **Health Check**. Click one of the health check recommendations to view the relevant help content.
- OpenAir NetSuite Connector administration and workflow settings forms— Go to Administration > NetSuite Connector, and click the Tips button then **NetSuite Connector administration form**, or select a workflow and click **Workflow settings** on the Mapping tab. Click one of the setting labels to view the relevant help content.

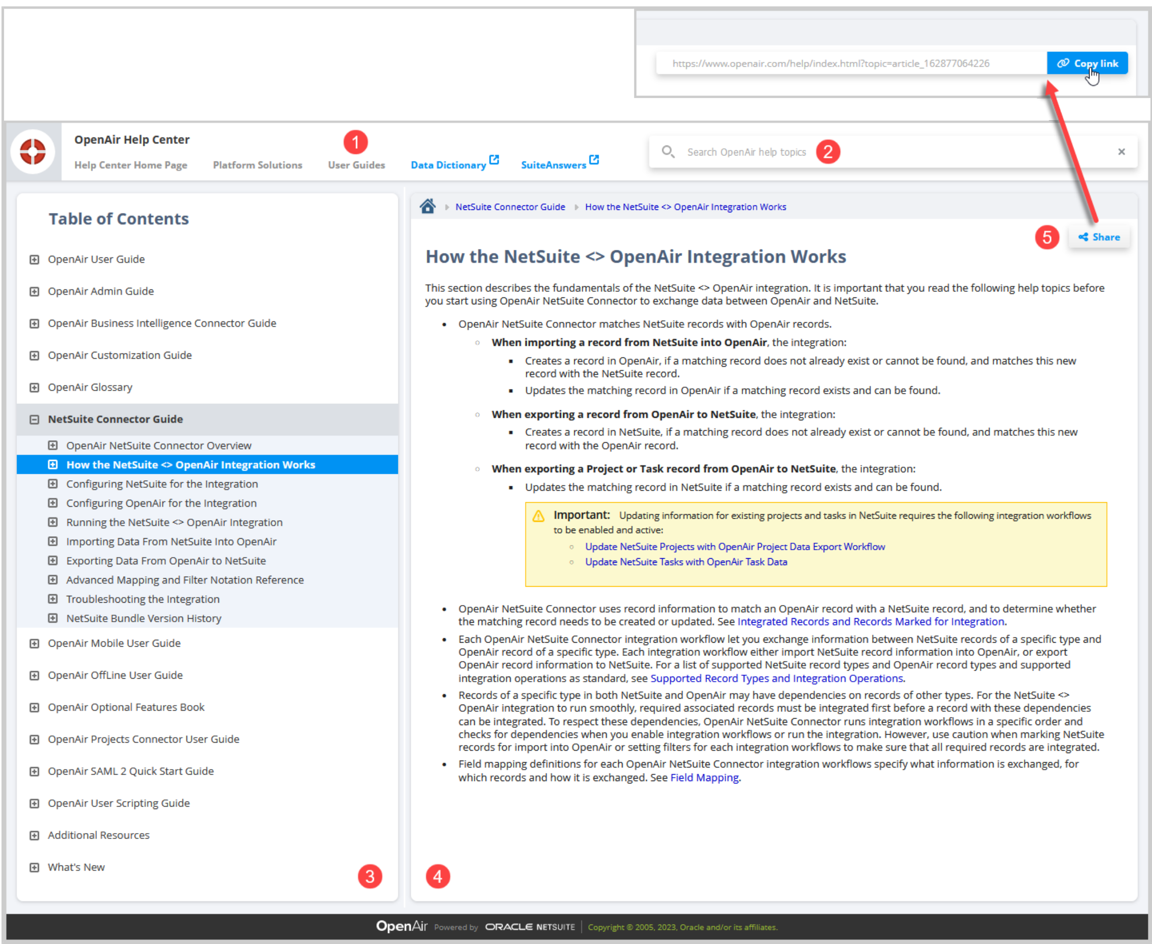
The OpenAir Help Center opens in a new browser window or tab and takes you directly to the relevant help topic.

1	**Use the links in the screen header to go quickly to specific landmark help center pages or to external resources** ■ Help Center Home Page — The default page for the OpenAir Help Center. ■ Platform Solutions — A catalog of all real world use case script examples described in OpenAir User Scripting Guide. Learn more about these examples and download the solutions from the platform solutions page. ■ User Guides — OpenAir User Guides are printable, PDF documents that provide conceptual information as well as step-by-step instructions on select OpenAir product areas. ■ Data Dictionary — The Data Dictionary is an information resource for account administrators, advanced users and developers creating custom integrations with OpenAir. It provides a summary of all tables, and standard fields in OpenAir. ■ SuiteAnswers — SuiteAnswers is a self-service support site where you can view support articles, training videos, help topics, and best practice documents on OpenAir products. From SuiteAnswers, you can also submit a question or issue by email or contact OpenAir Customer Support by phone. Resources outside the OpenAir Help Center such as the OpenAir Data Dictionary or OpenAir SuiteAnswers show in blue color and with the external resource icon .
2	**Search help topics by entering a keyword or phrase in the search bar and clicking the search icon .** You can search the Help Center content for specific topics. The search results are listed with the best match for your search term at the top and a visual indication of how well the topic matches your search terms. To search for exact search phrase, use double quotation marks around the search phrase. For example, to see a list of help topics mentioning "project stage" without listing help topics mentioning "project" or "stage" separately, enter the search phrase "project stage" with double quotation marks.
3	**Browse help topics in the table of contents pane** The table of contents in the left pane lets you browse the Help Center content organized by theme. The theme and content are the same as for each PDF guide Click the expand to show help topics in a book, chapter or section. Click the collapse icon to hide all help topics in the book, chapter or section. Click a heading to view the help topic in the right pane
4	**View help topics in the main content pane** The help topic you are viewing, and the book and chapter the help topic is part of, are highlighted in the table of contents pane. Breadcrumbs at the top of the help topic on the right pane lets you see the relation between the

<table>
<tr><td></td><td>help topic you are viewing and higher level pages (section, chapter and book). You can use the breadcrumbs as a secondary navigation aid to browse related help content.</td></tr>
<tr><td>5</td><td>Copy the help topic link to the clipboard and share it with other OpenAir users

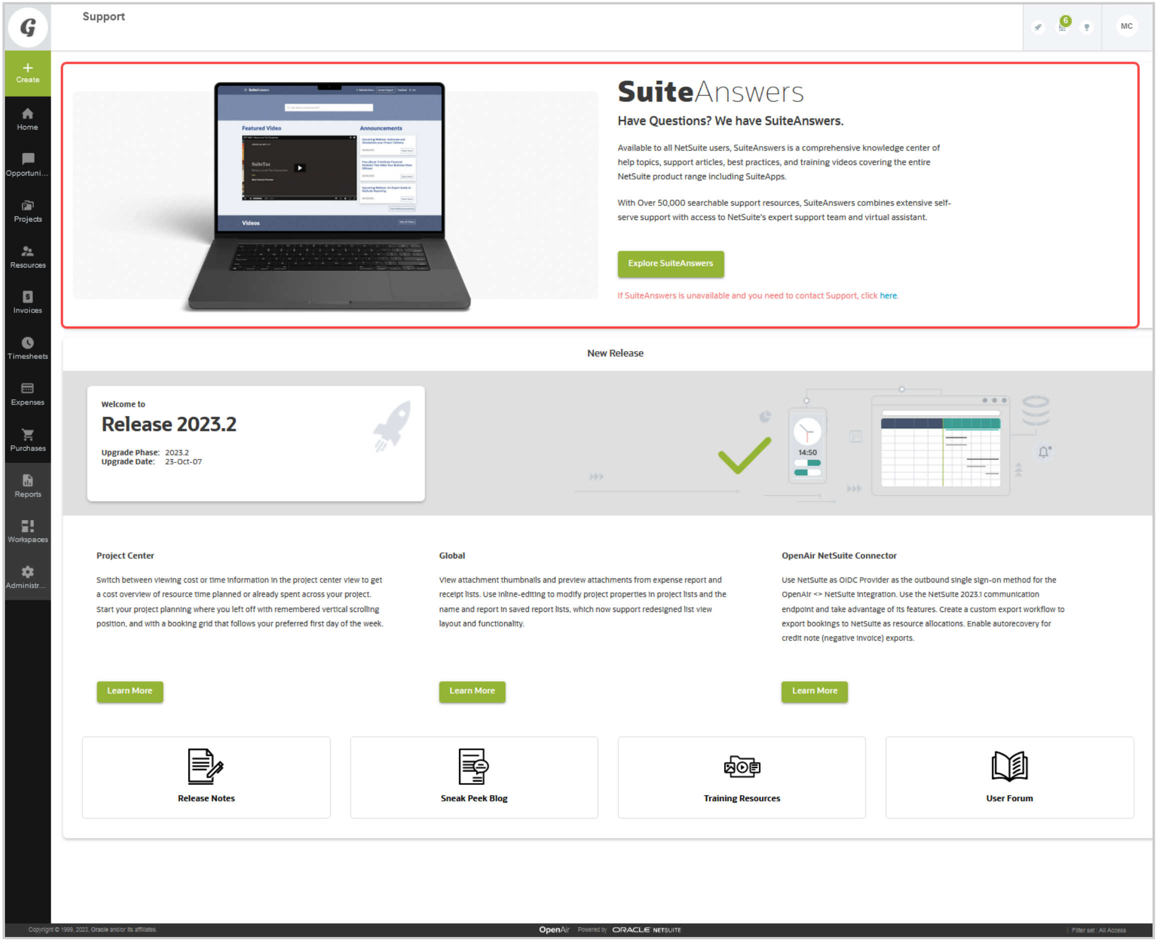
Each help topic in the OpenAir Help Center includes a Share button in the top right corner. Point to the Share button to view the help topic link and click Copy link to copy the link to your clipboard. You can then paste and share the link with OpenAir users using any team messaging or communication tool.

Note: Review the following guidelines:
▪ Users must be signed in to OpenAir to follow the link and view the shared help topic in the OpenAir Help Center.
▪ The URL uses the generic domain instead of your account-specific domain, for ease of sharing across multiple OpenAir accounts. However, the URL is environment specific. If you copy the link when viewing the OpenAir Help Center for a sandbox account, for example, the link is for a help topic on the sandbox version of the OpenAir Help Center.</td></tr>
</table>



SuiteAnswers

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



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

Use the SuiteAnswers portal to:

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

Creating a Support Case

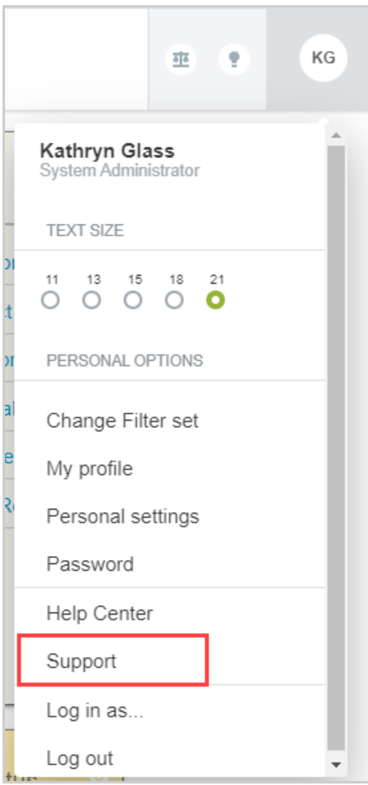
If you are experiencing difficulties with OpenAir or would like to enable an optional feature, go to SuiteAnswers through your OpenAir account and create a support case.

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

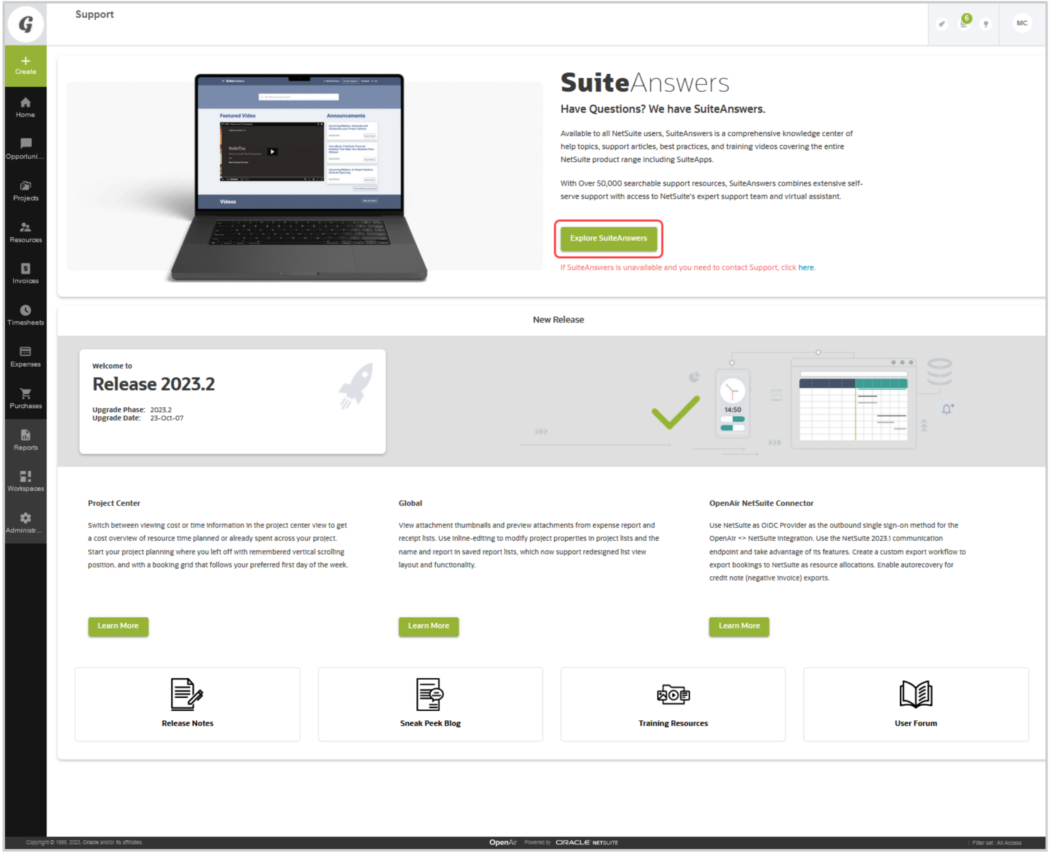
> **Important:** As a part of the support case creation process you will be presented with existing answers that may solve your problem. Take a moment to view the available answers before proceeding to create a support case.

To create a support case:

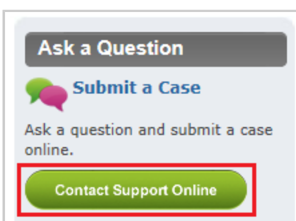
1. Log in to your OpenAir account and select **Support** from the User Center menu.



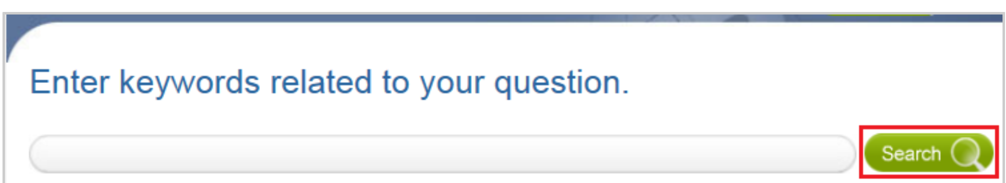
2. Click **Go to SuiteAnswers**.



3. On the OpenAir SuiteAnswers website, click **Contact Support Online**.

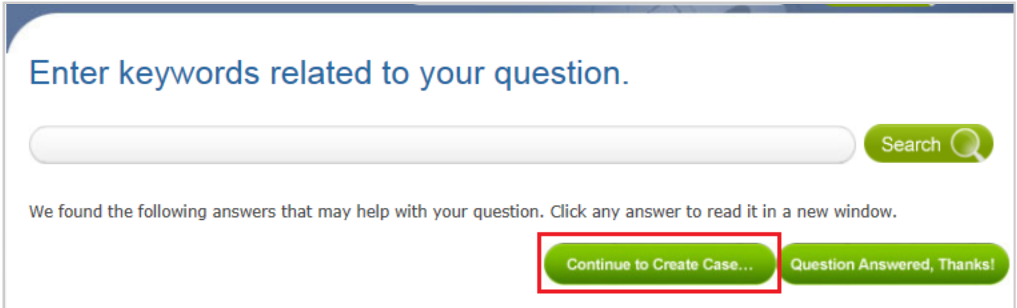


4. Enter keywords corresponding to the question or problem you want to resolve and click **Search**.



> **Note:** If you do not have a question but need a feature enabled, for example, click **Search**.

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



6. Fill out the **Create Case** form and then click **Submit**. You will receive an email confirmation with your support case reference (OpenAir Customer Care #).

> **Important:** Review the **Case severity** definitions and always use the appropriate case severity when submitting a case. See Case Severity Definitions.
>
> Using the appropriate case severity helps OpenAir Customer Support prioritize between cases. Otherwise, OpenAir Customer Support need to evaluate the true urgency of each case, which slows down the response time to all cases.

> **Note:** An asterisk * indicates a required field.

Case Severity Definitions

Review the following Case severity definitions and always use the appropriate case severity when submitting a case.

Using the appropriate case severity helps OpenAir Customer Support prioritize between cases. Otherwise, OpenAir Customer Support need to evaluate the true urgency of each case, which slows down the response time to all cases.

- **C1 – Critical / Business Down**: Production use of the service is stopped or so severely impacted that the company cannot reasonably continue business operations.
- **C2 – Urgent**: One or more important functions of the service are unavailable with no acceptable alternative solution. Customer's implementation or production use of the service is continuing but there is a serious impact on business operations.
- **C3 – How-to / Non-urgent Questions**: Important service features are unavailable but an alternative solution is available, or less significant Service features are unavailable with no reasonable alternative solution. There is minor loss of business operation functionality or an impact on implementation resources.

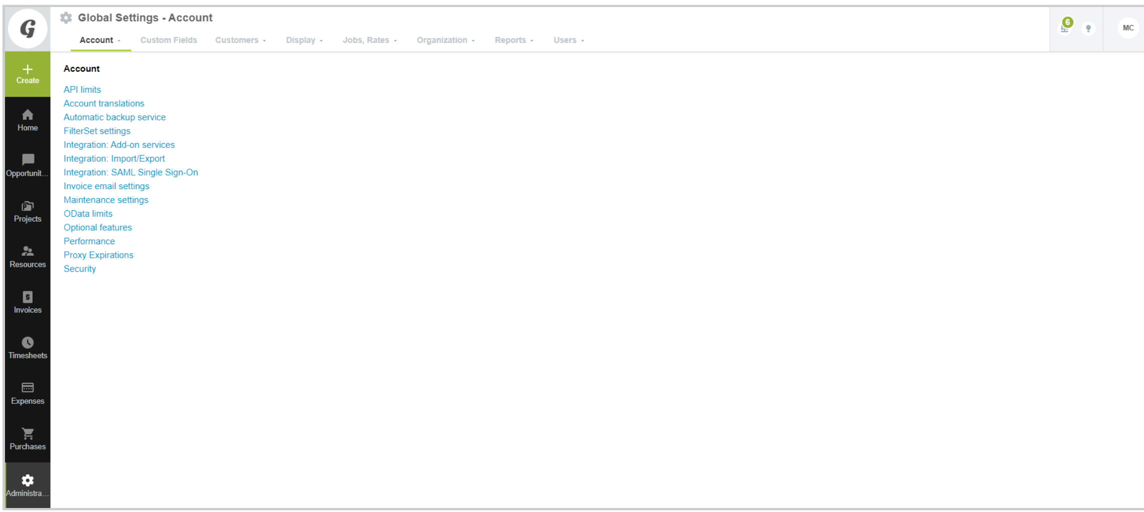
  > **Note:** Use the case severity `C3 – How-to / Non-urgent Questions` when submitting a case to request a sandbox refresh.

- **C4 – Enhancement / Non-tech Support**: An incident that has a minimal impact on business operations or basic functionality of the service.

Administration – Global Settings

Overview

The Administration > Global Settings application contains a majority of the configuration items within OpenAir, both for OpenAir account and for your specific employee accounts and customers. It divides settings into sections that include additional sub-tabs. Items configured in Global Settings are generally available to all OpenAir users, depending on their Role, Form Permissions, and Filter Sets.



Global Settings are listed under the following sections:

- Account
- Custom Fields
- Customers
- Display
- Jobs, Rates
- Organization
- Reports
- Users

Account

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Account. The following lists them in the order in which they display on the Global Settings window.

- API Integration Applications – See OAuth 2.0 Token Based Authentication
- API Limits

- Automatic Backup Service
- FilterSet Settings
- Integration: Import/Export
- Licenses
- Optional Features
- Performance
- Proxy Expirations
- Security

> **Note:** Depending on your account configurations, settings for integrations between OpenAir and other applications may be available under Account settings. You should contact OpenAir Professional Services before attempting to use any of these integrations. Assistance with set up as well as relevant documentation may help guide you in using these integrations. See Account Integration Settings for a list of OpenAir integrations.

OAuth 2.0 Token Based Authentication

OpenAir supports OAuth 2.0, a robust authorization framework. This authorization framework enables client applications to use a token to access OpenAir through the OpenAir XML, SOAP, or REST API. The application accesses the protected resources on behalf of a user who gave an explicit permission for the access. This method eliminates the need for API integrations to store user credentials.

This feature is available if OpenAir API access is enabled for your account. It includes the following elements:

- **Administrators** can register up to 20 integration applications with OpenAir and enable or disable these applications in the Administration module. For more information, see Managing API Integration Applications in OpenAir.
- **Administrators** can use web services reports to audit and revoke authorizations granted by OpenAir users to integration applications. For more information, see the help topic Auditing and Managing OAuth 2.0 Authorizations in OpenAir Security Guide.
- **Application Developers** can use the OAuth 2.0 authorization code flow to get an access token then use the access token to access your OpenAir data using the OpenAir API. For more information, see the help topic OAuth 2.0 for Integration Applications Developers (Help topic under OpenAir API).

  > **Note:** OpenAir only supports the OAuth 2.0 authorization code grant type.

- **End-users** can give applications explicit permission to access OpenAir on their behalf and they can revoke this permission at any time. For more information, see Authorizing Applications to Access OpenAir on Your Behalf.

Note: The first time a registered application attempts to access OpenAir on their behalf, users must sign in using the same trusted login form they normally use to log in to OpenAir then give the application explicit permission. The OAuth 2.0 feature supports the following user authentication mechanisms:

- Password authentication by OpenAir — Users enter their Company ID, User ID and Password on the OpenAir login form.
- SAML authentication:
  - Service Provider initiated Single Sign-on — Users enter their login details on your company Single Sign-on form.
  - Identity Provider initiated Single Sign-on — Users must log in using their Identity Provider Single Sign-on form before the application attempts to access OpenAir on their behalf. When the application attempts to access OpenAir, the authorization screen appears automatically. Users do not need to enter their login details again if the Single Sign-on session has not expired.

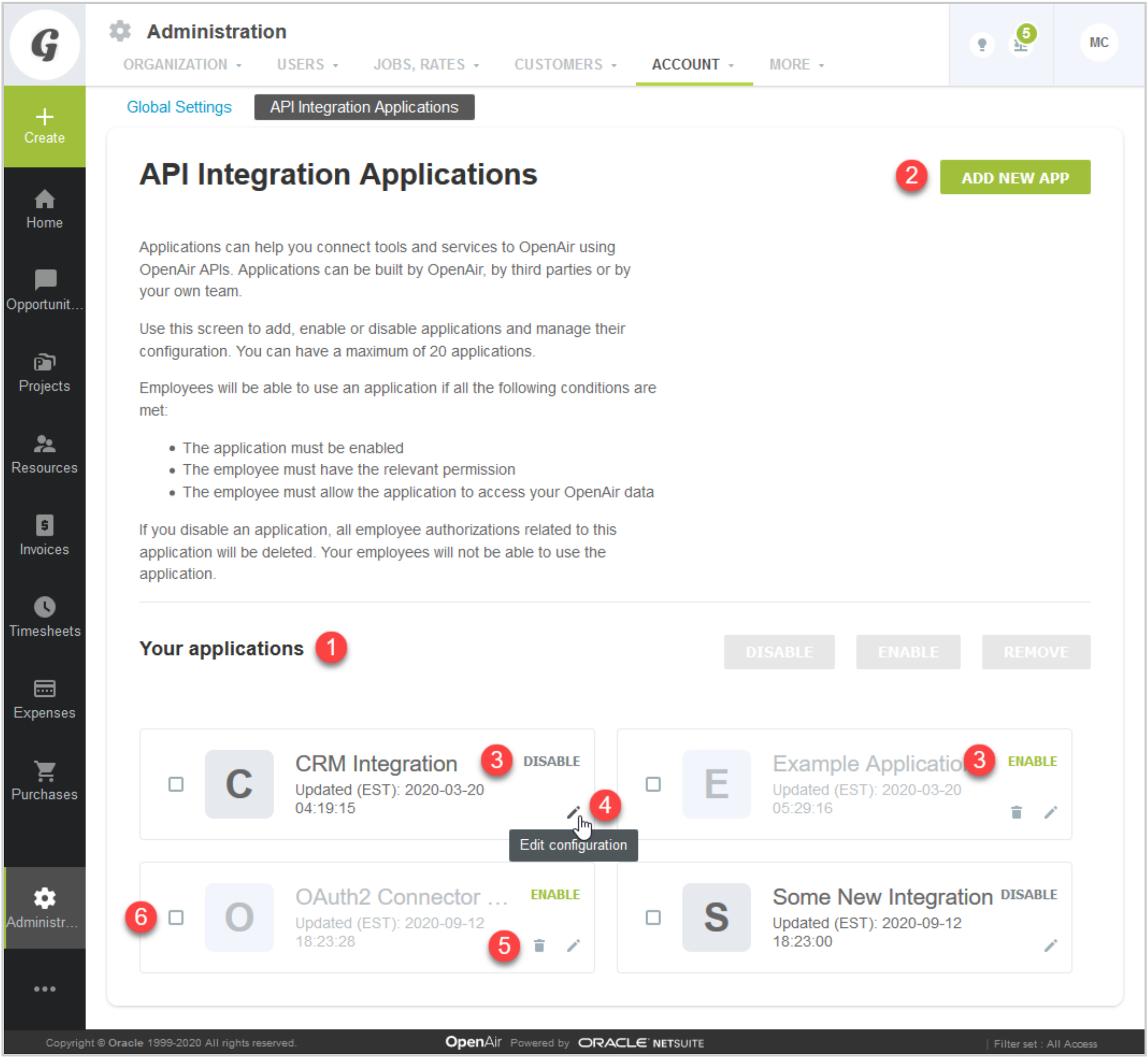
Managing API Integration Applications in OpenAir

Integration applications using OAuth 2.0 to obtain access to your OpenAir data must be registered and enabled by an account administrator. To register and manage your integration applications, go to Administration > Global Settings > Account > API Integration Applications.

Note: OpenAir API access must be enabled for your account to connect tools and services to OpenAir using OpenAir APIs. The API Integration Application screen is not available if OpenAir API access is not enabled. To enable OpenAir API access for your account, contact OpenAir Customer Support or your OpenAir account manager.

1. All your registered applications are listed in a grid. Details include the name of the application and the date and time when it was last updated.
2. To register a new application, click **ADD NEW APP**. This button is disabled if you reach the limit of 20 registered applications. See Adding a New Application.
3. To enable or disable an application, click **ENABLE** or **DISABLE** in the top right corner of the corresponding box. See Enabling, Disabling, or Removing Registered Applications
4. To edit an application configuration, click the edit icon in the bottom right corner of the corresponding box. See Application Configuration.
5. To remove an application configuration from the list of registered applications, click the delete icon in the bottom right corner of the corresponding box. See Enabling, Disabling, or Removing Registered Applications.
6. To select one or more applications, check the box next to each application you want to select. You can only select multiple applications if they are either all enabled, or all disabled. You can then enable, disable or remove the selected applications. See Enabling, Disabling, or Removing Registered Applications.

Note: All times are given as Eastern Standard Time (EST).



Adding a New Application

You can register up to 20 applications. Each application needs a Client ID and Client Secret to obtain access to OpenAir using OAuth 2.0. The Client ID and Client Secret are generated by OpenAir as part of the registration process and are unique to each application.

Important: The Client Secret is a **private** key the application uses to request an authorization code from OpenAir. It should not be shared or stored in public code repositories.

The Client Secret is displayed only once. You will not be able to retrieve it after you close the Application Credentials dialog.

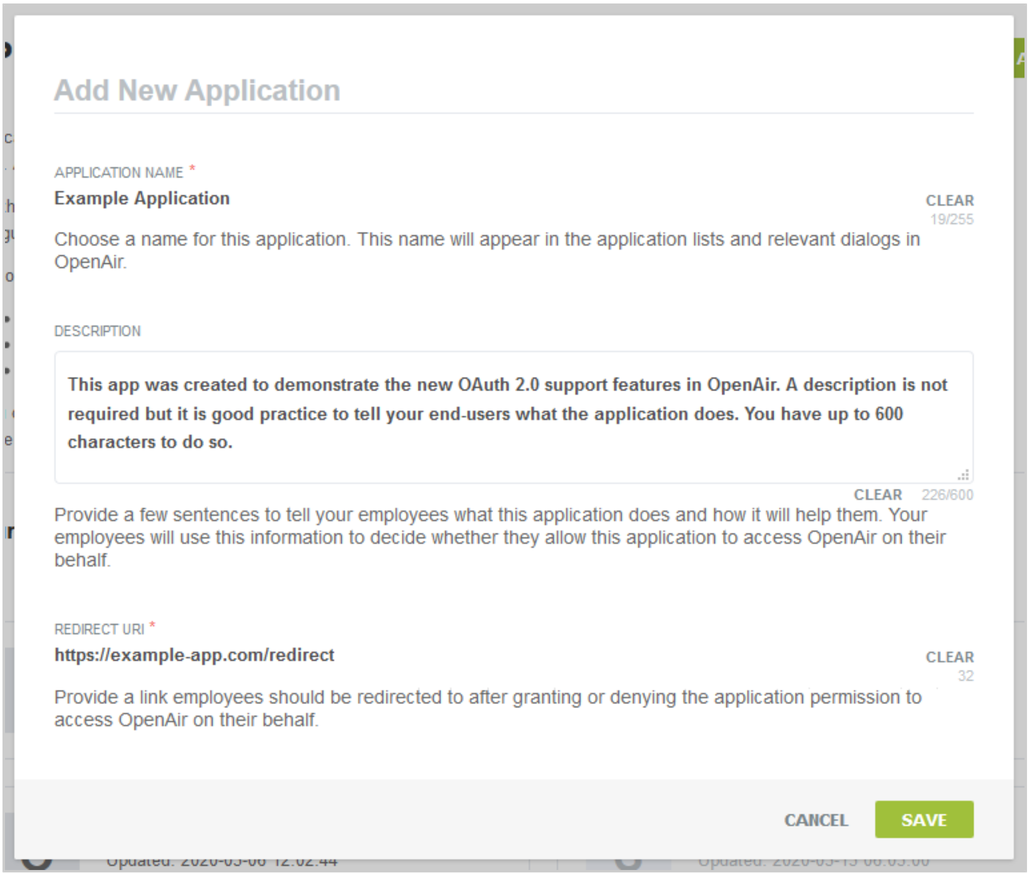
If you misplace the Client Secret, you can edit the application configuration and generate a new Client Secret for the application.

To register a new application with OpenAir:

1. Do one of the following:
   - Go to Administration > Global settings > Account > API Integration Applications, and click **ADD NEW APP**.
   - From any screen in OpenAir, click the Create button and click API integration application.

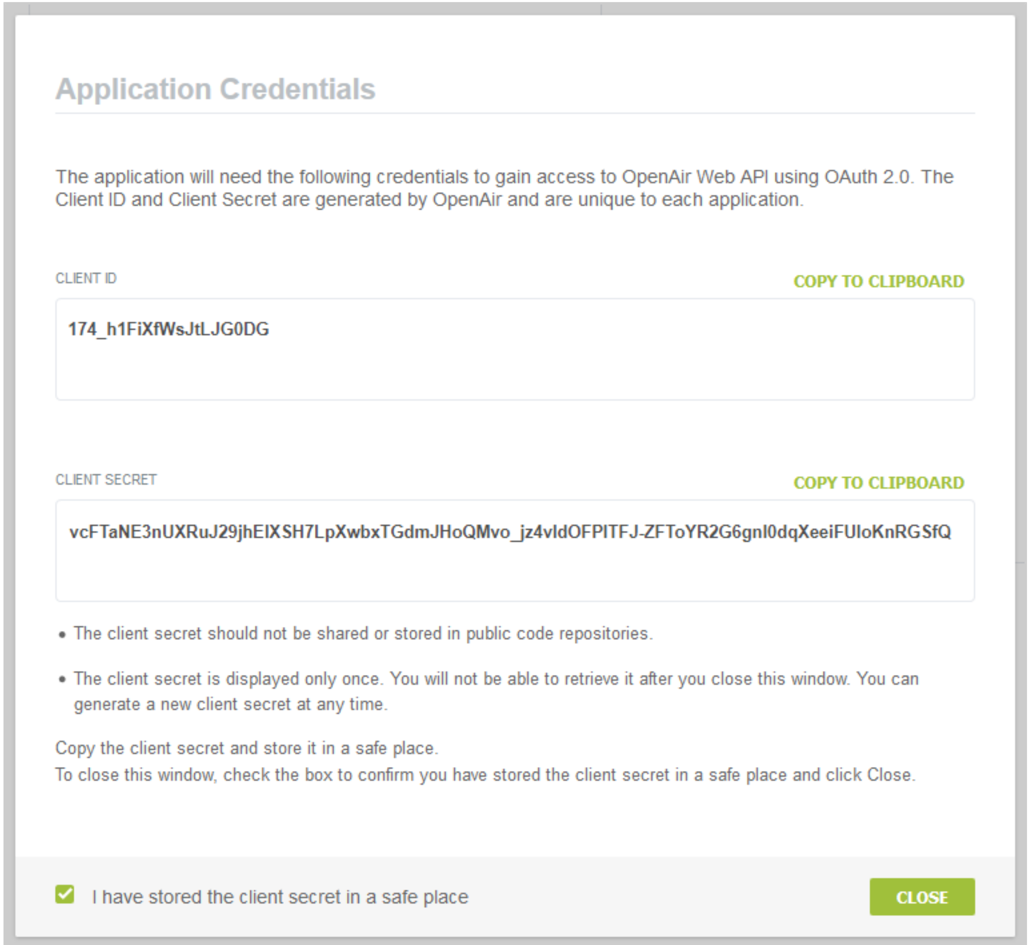
   The Add New Application dialog box appears.
2. Enter the following information:
   - **Application name** (Required) — Enter a display name for your application in OpenAir. The name must be unique to the application. You will not be able to use a name already used by another registered application.
   - **Description** — Enter a few sentences to tell your employees what the application and how it will help them. Your employees will use this information to decide whether they allow this application to access OpenAir on their behalf.
   - **Redirect URI** (Required) — Enter a link users should be redirected to after granting or denying the application permission to access OpenAir on their behalf.

Important: Client applications use the redirect URI when requesting access to OpenAir. Ensure you enter the redirect URI supplied by the application developers.



3. Click **Save**. The Application Credentials dialog box appears.
4. Copy the **Client Secret** and store it in a safe place. The Client Secret is displayed only once. You will not be able to retrieve it after you close this window.

 OpenAir



5. Check the box to confirm you have copied and stored the Client Secret in a safe place then Click **Close**.

Enabling, Disabling, or Removing Registered Applications

You must enable an application to allow this application to obtain access to OpenAir using OAuth 2.0.

You can disable an application to prevent this application from obtaining access to OpenAir using OAuth 2.0. If you disable an application OpenAir automatically revokes all permissions given by users for the application to access OpenAir on their behalf. Employees will not be able to use the disabled application.

You can remove a disabled application from the list of registered applications. All permissions, authorizations and application credentials associated with the application configuration will be deleted. This action cannot be undone.

To enable or disable a registered application:

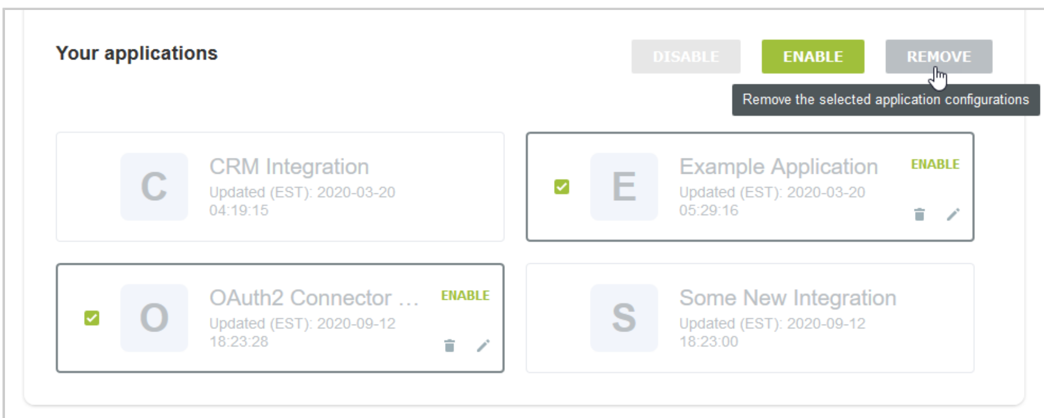
1. Go to Administration > Global settings > Account > API Integration Applications.
2. Click **ENABLE** or **DISABLE** in the top right corner of the corresponding box. A confirmation dialog box appears.
3. Click **ENABLE** or **DISABLE** to enable or disable the application. Click **Cancel** to cancel the operation and return to the API Integration Applications screen.

To remove a registered application:

1. Go to Administration > Global settings > Account > API Integration Applications.
2. Click the delete icon in the bottom right corner of the corresponding box. A confirmation dialog box appears.
3. Click **REMOVE** to remove the application. Click **Cancel** to cancel the operation and return to the API Integration Applications screen.

To enable, disable, or remove multiple applications at the same time:

1. Go to Administration > Global settings > Account > API Integration Applications.
2. Check the box for each application you want to enable, disable, or remove. Notice that you can only select multiple applications if they are either all enabled, or all disabled. After you select the first application, the application that are not available for selection appear in light gray color. Notice also that some of the buttons in the top right corner of the list of registered applications become available and change from light gray color to dark gray or green.



3. Click **ENABLE**, **DISABLE**, or **REMOVE** to perforrm the corresponding action on all selected applications. A confirmation dialog box appears. Click **ENABLE**, **DISABLE**, or **REMOVE** to confirm. Click **Cancel** to cancel the operation and return to the API Integration Applications screen.

Application Configuration

You can view the configuration details of your registered applications, including their unique Client ID from the Application Configuration form. You can change the application name, description or Redirect URI or generate a new Client Secret for the application.

To open the Application Configuration screen for a registered application, go to Administration > Global Settings > Account > API Integration Applications and click the edit icon in the bottom right corner of the corresponding box.

1. The **General** section of the form lists the main application detail:
   - You can change the **Application name**, **Description** and **Redirect URI**.

     > **Important:** Client applications use the redirect URI when requesting access to OpenAir. Ensure you enter the redirect URI supplied by the application developers. If you need to change the redirect URI, disable the application, change the redirect URI and enable the application again.

   - You can view when the application was registered under **Created**.

> **Note:** All times are given as Eastern Standard Time (EST).

2. You can view the **Client ID** — the unique identifier a client application needs to send to OpenAir along with a client secret as part of the OAuth 2.0 authorization code flow.
3. Use the **Tokens Lifetime** section to configure the validity period of the access and refresh tokens:
   - **Access token lifetime** — Select the expiration time of access tokens. Available values go from 5 to 60 minutes in 5–minute increments. The default access token lifetime is 15 minutes.

     > **Note:** The validity period of access tokens cannot be greater than the session timeout set for your account. If the **Access token lifetime** value is greater than the session timeout value, the session timeout value is used for the access token validity period. The application configuration form shows the current values for the session timeout and access token validity period for reference.
     >
     > To change the session timeout value , go to Administration > Global settings > Account > Security.

   - **Refresh token lifetime** — Select the expiration time of refresh tokens. Available values go from 1 to 31 days in one–day increments. The default access token lifetime is 1 day.

     > **Note:** Before the October 2021 OpenAir release, you could set the refresh token lifetime to values from 1 to 24 hours in one–hour increments. Values for the refresh token lifetime set before the October 2021 OpenAir release show in days (decimal values) instead of hours

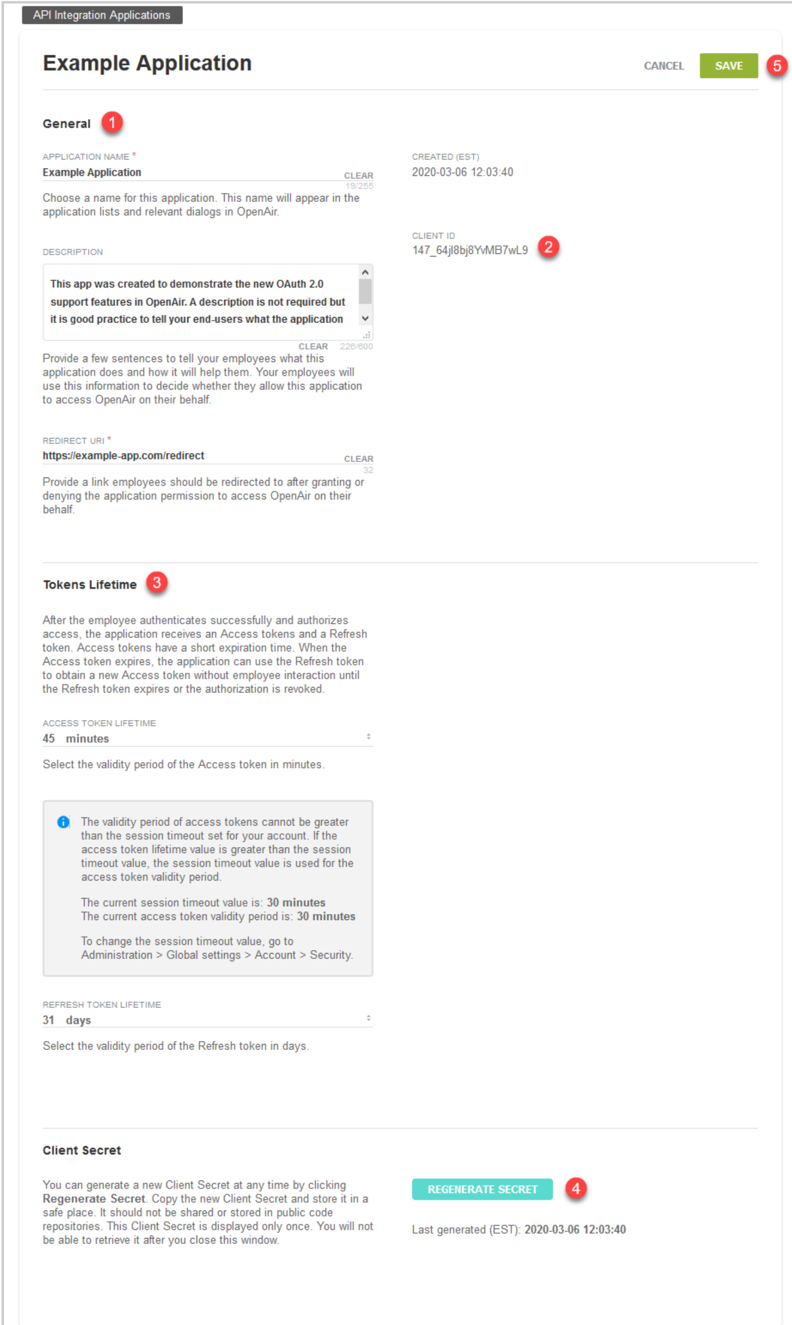
   As part of the OAuth 2.0 authorization code flow, authorized applications need to exchange an authorization code for an access token and refresh token to obtain access to OpenAir. The access token has a short expiration time. When the access token expires, the client application can use the refresh token to obtain a new access token without user interaction until the refresh token expires or the authorization is revoked.

   > **Note:** Access tokens normally remain valid for their entire lifetime. However, the access token becomes invalid before it is due to expire if any of the OpenAir business rules have changed and the access token is refreshed. Business rule changes may include any changes to the OpenAir configuration, or to the access privileges or role permissions of the employee who authorized the client application.
   >
   > Each refresh token can be used one time only. Refresh in an access token generates a new access token and a new refresh token.

4. To generate a new Client Secret, click **Regenerate Secret** — You may need to generate a new client secret if you misplace or delete the client secret accidentally or if your client secret becomes compromised.

   The new client secret will be valid immediately. The old client secret will continue to be valid for 24 hours after you generate a new one. This allows time to update any enabled application with the new client secret.

5. If you made any changes to the configuration details in the General section, the **Save** button is enabled. Click **Save** to save changes and return to the API Integration Applications screen or click **Cancel** to close the configuration form without saving.



Authorizing Applications to Access OpenAir on Your Behalf

Integration applications let you connect OpenAir with other applications and they extend what you can do with OpenAir. Integration applications may use the OAuth 2.0 authorization protocol to gain access to your OpenAir account.

The first time an application using the OAuth 2.0 protocol attempts to access OpenAir on your behalf, you will need to give this application your explicit permission.

To authorize an application, you will typically use the following steps:

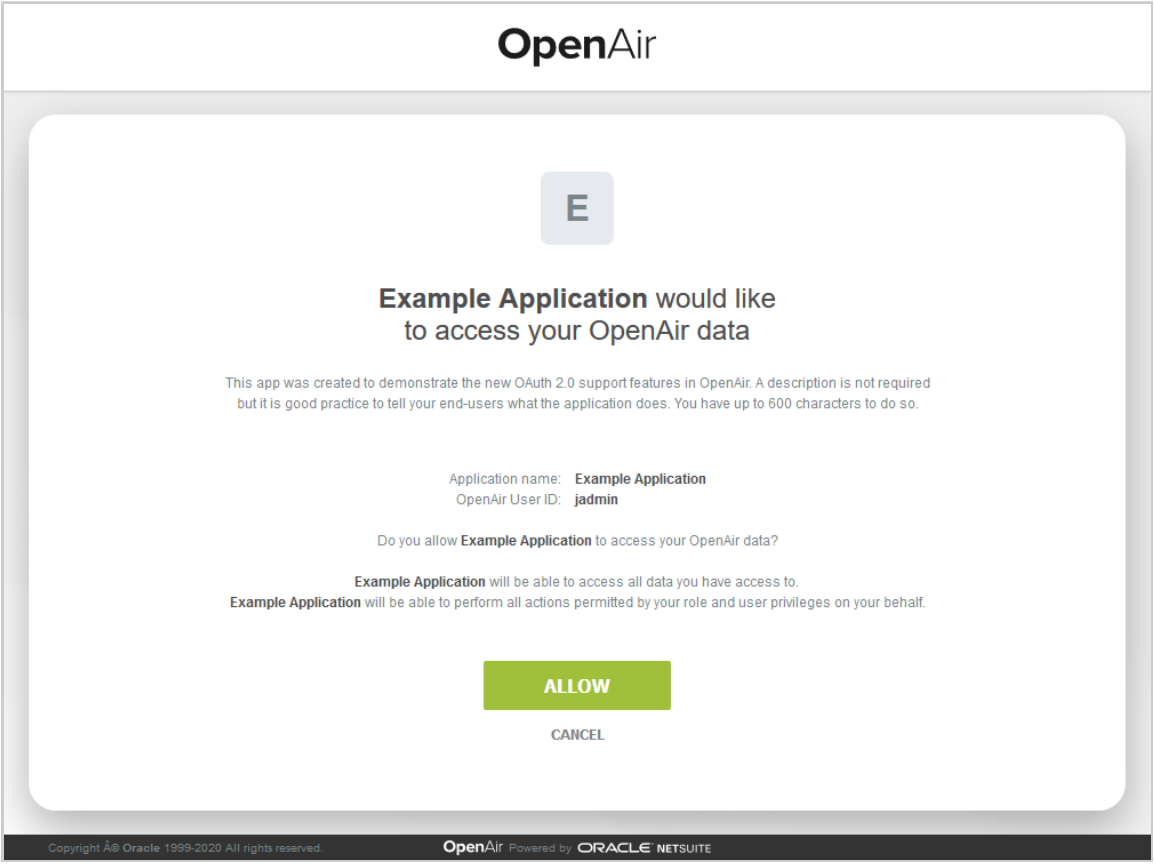
1. The application opens a browser and directs you to the same trusted login form you normally use to log into OpenAir — the OpenAir login form or your company Single Sign-on form appears.
2. Enter your login details and click **Log in**.

   An authorization screen will appear indicating that the application `<application name>` would like to access your OpenAir data.
3. Read the content of the authorization screen attentively. It should describe what the application does and how it will help you. It should also say what the application can do, for example:
   - The application will be able to access all data you have access to.
   - The application will be able to perform all actions permitted by your role and user privileges.

   > **Important:** **For Administrators** — Business rules configured for your OpenAir account are applied when an integration application interacts with your OpenAir data through OpenAir REST API. However, they are not applied when an integration application interacts with your OpenAir data through OpenAir SOAP API or XML API — application developers must enforce business rules within their integration application if required. Business rules include OpenAir account configuration settings and access control mechanisms, as well as any user scripts deployed on your OpenAir account.
4. Click **ALLOW** to authorize the application or click **CANCEL** if you do not want the application to access OpenAir on your behalf.

> **Note:** The steps may vary depending on the method you use to log in to OpenAir:
>
> - If you normally enter your company ID, user ID and password in OpenAir or if you enter your company ID and user ID in OpenAir and then your password on your company Single Sign-on page, the above steps apply.
> - If you normally need to enter all login details then select OpenAir from your company Single Sign-on solution to access OpenAir without needing to enter any login details on the OpenAir login page (Identity Provider initiated Single Sign-on), you must log in and select to open OpenAir before the application attempts to access OpenAir on your behalf. The authorization screen appears automatically. Follow steps 3 and 4 above. You do not need to re-enter your login details.

Integration applications are registered and managed by your account administrator. They need to be enabled on your account before they can attempt to connect to OpenAir and request your permission.



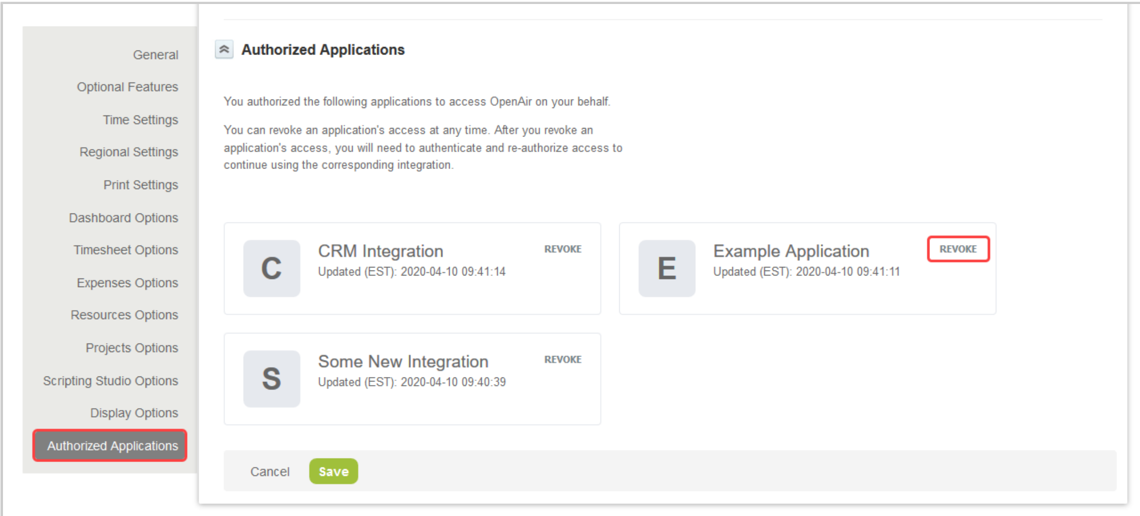
> **Note:** Integration applications are registered and managed by your account administrator. They need to be enabled on your OpenAir account before they can attempt to connect to OpenAir and request your permission.
>
> Account administrators can disable an application at any time.
>
> - If you have authorized an application and this application is disabled by an administrator, the application will no longer be able to interact with OpenAir.
> - If an administrator enables this application again, you will need to give this application your explicit permission again before you can continue to work with it in connection with OpenAir.

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

To view the application you have authorized, go to User Center > Personal Settings > Authorized Applications. All your authorized applications are listed in a grid. Details include the name of the application and the date and time when it was last updated.

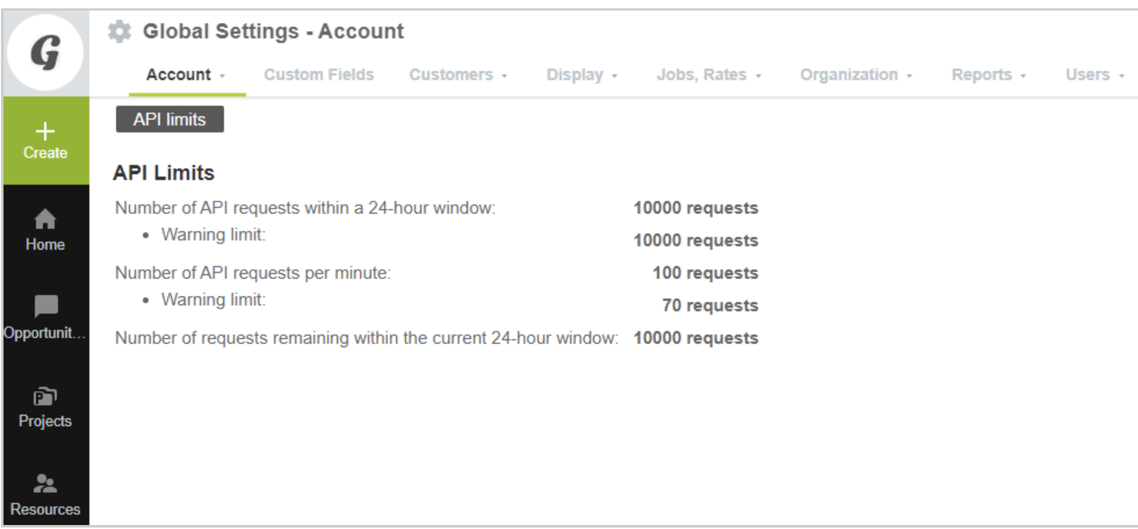
> **Note:** All times are given as Eastern Standard Time (EST).

To revoke an application, click **REVOKE** in the top right corner of the corresponding box, then click **REVOKE** in the confirmation message. The application no longer shows in the authorized applications list. If a revoked application attempts to access OpenAir on your behalf, you will be prompted to give this application your explicit permission again.



API Limits

This screen shows the API requests limits that are currently set for the account and the number of requests remaining within the current 24-hour period. It is a useful reference to track your usage level when using the OpenAir REST API, SOAP API and XML API. This is for reference purposes only, account administrators cannot change these settings. For more information, see the help topic API Limits.



Automatic Backup Service

The OpenAir Automatic Backup Service (ABS) lets you set up a regular delivery of your OpenAir account data to an email address or SCP/SFTP server for safeguarding. Your data is compressed as a ZIP file and can be PGP encrypted for additional security. You can use this feature to download all of your data, workspace documents and attachments.

> **Note:** The Automatic Backup Service is a licensed add-on and must be purchased separately. To enable the Automatic Backup Service feature, contact your OpenAir account manager or OpenAir Professional Services.

Setting up the Automatic Backup Service

When the Automatic Backup Service (ABS) is enabled, go to Administration > Global Settings > Account > Automatic backup service and configure your backup settings.

- **Data to include in the backup** — Select which data will be exported in each backup. You can include the OpenAir data dictionary, text files (either comma- or tab-delimited) and MySQL import file. You can set the default CHARSET for your MySQL import files to "UTF-8", and include table relationships in the MySQL import file.

  > **Note:** If the **Apply relationships** box is checked, the MySQL import file contains statements to support table relationships:
  >
  > - Change the storage engine to “`InnoDB`”.
  > - Change foreign key columns to allow `null` values.
  > - Set foreign keys to `null` if the value is `0` (zero).

- **Documents and attachments** — Check the **Document and attachments** box to include them in the backup.
  - By default, the filename of each attachment and workspace document is the OpenAir internal ID number. You can append the original names and extensions to documents and attachments in addition to the OpenAir internal ID number.
  - You can use a **Date range filter** to include only documents and attachments created or updated during a specific period. Using a date range filter can be useful to manage the size of the backup file. The form indicates the total file size of selected documents before compression.
- **When do you want the backup to run** — schedule when you would like the backup to run. You can set the schedule to particular days of the week or month, or every day. You can also set the time for the backup to run. You should run the backup in the evening for better performance.
- **How do you want the data sent** — Select how the data should be sent. Options include SCP, SFTP or Email. Emails will not be sent if the files are larger than 60 MB. You can also suspend the service.

  > **Important:** Support for the FTPS protocol in the Automatic Backup Service stopped on January 20, 2021.

- **SCP/SFTP settings**
  - **Address** — Enter the IP address or DNS name for your SCP or SFTP connection.
  - **Directory** — Specify a directory to place the exported file in.
  - **User name** — Enter the user name used for your SCP or SFTP connection.
  - **Password** — Enter and verify the password for the SCP or SFTP service.
  - **Status email** — Enter an email address for status emails to be sent to.
  - **Status notification** — Select which events are included in status emails. You can include all events or errors only.

- **Disable remote file attribute copy** — Try to check this box if you receive `setstat` errors during the ABS transfer.
- **Try to resume transfer when it fails** — Check this box to try and resume the transfer in case the connection to the SFTP server is interrupted. This is only available if you choose to send your data using SFTP.

  If the SFTP connection is interrupted, OpenAir will attempt to retry the scheduled automatic backup transfer twice. After the third unsuccessful attempt, an error is logged and a status notification email is sent to advise that the automatic backup was unsuccessful. The status notification email also indicates if the connection is interrupted but the automatic backup completes successfully on the second or third attempt.
- **Seconds between retry attempts** — Enter the time interval (in seconds) between ABS transfer attempts. The interval can be between 5 seconds (default) and 5 minutes.

  > **Note:** After you change the transfer method to SFTP, click **Save** to see the **Try to resume transfer when it fails** box and **Seconds between retry attempts** field.

> **Important:** Support for custom remote ports for SCP or FTPS in the Automatic Backup Service stopped on January 20, 2021.

- **SSH Security Information** — After you set up the ABS and OpenAir connects with the SCP or SFTP server, OpenAir stores the SSH public keys for all hosts ABS connected to (**Known hosts**). To clear the list, check the **clear list** box.

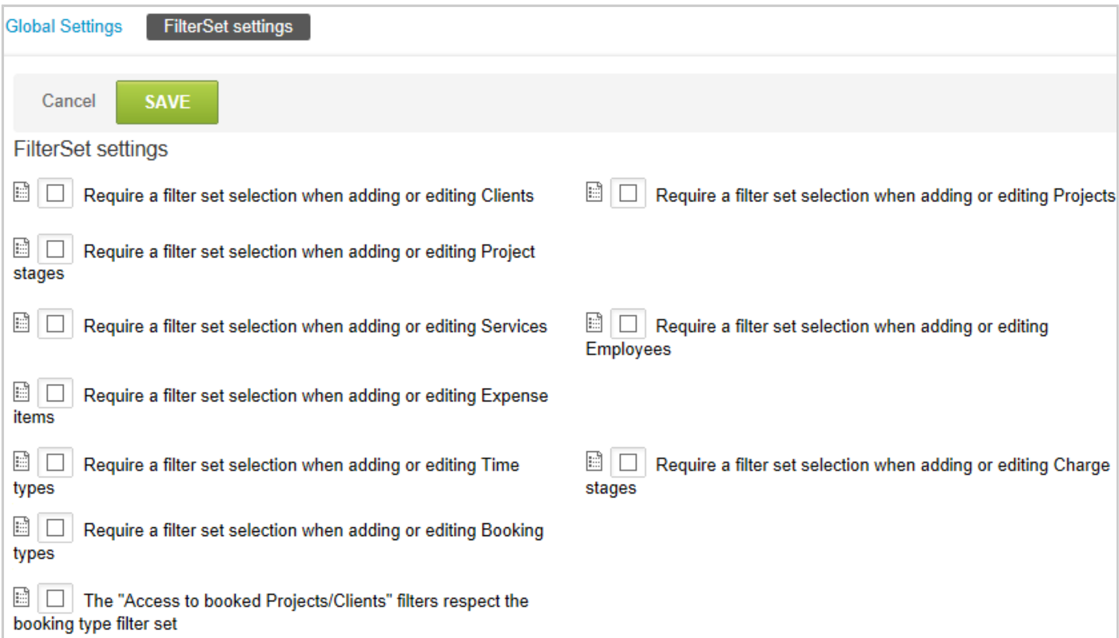
  > **Note:** To replace an existing SSH public key with a new one:
  >
  > 1. Check the **clear list** box.
  > 2. Click **Save**.
  > 3. Click the Tips button then **Test ABS connection settings**. If the connection test is successful, the new SSH public key is added to **Known hosts**.

- **PGP Encryption** — If you want to use PGP encryption, copy and paste the PGP public key in the text box.
- **Other**
  - **Include the audit trail in the text backup** — By default, text files do not include audit trails. Check this box to include the audit trail. This can make the text files difficult to parse. MySQL import files always include the audit trail.
  - **Include all tables in the text and MySQL backups** — By default, the export excludes some tables with typically large datasets such as `assign_by_day`, `booking_by_day`, `schedule_by_day`, and `user_tag_by_day` for example. Check this box to include all tables in text and MySQL backups.
  - **Include status file with backup** — Check this box to include a small status file with data about the transfer. The status file contains the checksum of transferred file(s), file size, and the list of all tables.
  - **Tables to exclude** — You can exclude tables from a MySQL import file here. Enter the list of tables to exclude, separated by commas.

Exporting All OpenAir Attachments

When set up, each export will contain a folder within the main ZIP file containing all attachments, labelled with a numeric attachment ID. Select the “Add original names and extensions to Documents and attachments” option in the “Data to include in the backup” section to add the original attachment filenames to each attachment in addition to the numeric attachment ID.

FilterSet Settings



Using filter sets lets you specify access privileges to various entities in OpenAir such as customers, projects, and employees. You assign filter sets to employees. Based on how filter sets are created, an employee's view and access to the various entity values can be narrow or expanded to a wider and possibly an all-value level. Employees may have more than one filter set assigned to them, but only one may be used at any particular time. Essentially, a filter set is what an employee can see and a role is what an employee can do within OpenAir. See Filter Sets Overview and Change Filter set.

To access the Filter Set settings:

1. Go to Administration > Global Settings > Account > FilterSet settings.

The options listed below control the use of filter sets at a company-wide level. See Filter Sets Overview.

- Require a filter set selection when adding or editing Customers
- Require a filter set selection when adding or editing Projects
- Require a filter set selection when adding or editing Project stages
- Require a filter set selection when adding or editing Services
- Require a filter set selection when adding or editing Employees
- Require a filter set selection when adding or editing Expense items

- Require a filter set selection when adding or editing Time types
- Require a filter set selection when adding or editing Charge stages
- Require a filter set selection when adding or editing Booking types
- The "Access to booked Projects/Customers" filters respect the booking type filter set.

> **Note:** If a Booking type filter set has been created, this option restricts which projects and customers are available to the employee.

Integration: Import/Export

The Integration: Import/Export link contains links for exporting OpenAir account data and batch data.

Exporting Account Data

You can export all of your account data in a comma- or tab-delimited text file format. You can also export account data in MySQL format, so you can then import it to a MySQL database.

Additional export options include exporting your Account specific WSDL and XSD schema files.

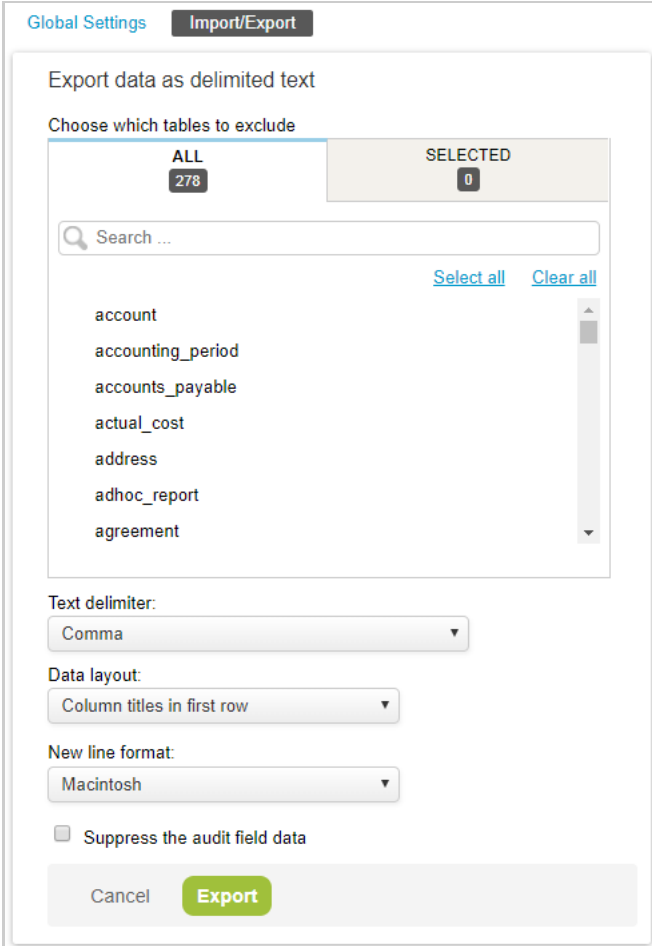
To export account data in text format:

1. Go to Administration Global Settings > Account and click **Integration: Import/Export**.
2. In the Import/Export screen, click the **All data in text format** link.
3. In the **Choose which tables to exclude** list, select any tables to exclude from the text file.

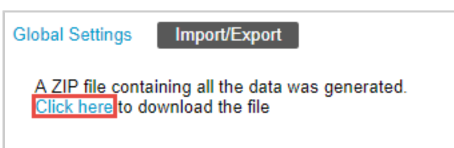
   > **Tip:** If you only want to include a small number of tables, first click Select all to exclude all tables, and then select the tables you want to include. In addition, audit trail information can increase the table size significantly. If you do not need audit trail information, select the “Suppress the audit field data” option, which may significantly reduce the size of the generated file, and generate results more quickly.

   > **Warning:** Larger tables, such as `assign_by_day`, `booking_by_day`, `schedule_by_day`, and `user_tag_by_day`, for example, are excluded from text exports. These tables can be exported using the Automatic Backup Service (ABS). For more information, see Automatic Backup Service.

4. Select which text delimiter you want to use in the file. Text files can be comma- or tab-delimited, or you can select a regional setting CSV list separator.
5. Select the data layout format:
   - **Column titles in first row** — text file includes column titles for your data in the first row of the text file
   - **No titles in data** — the text file only includes data, and does not include column titles
6. Select a new line format. You can use Windows, Macintosh, or UNIX new line format.
7. Select the **Suppress the audit field data** option if applicable.
8. Click **Export**. OpenAir will create a ZIP file containing the generated data.



9. Click the **Click here** link to download the ZIP file with your data.



Note: This process creates a MySQL file for the version of MySQL currently in use by OpenAir. The currently supported version is named on the **Export data as MySQL file** screen. The exported MySQL file can be imported into a MySQL database where queries and reports can be run against it.

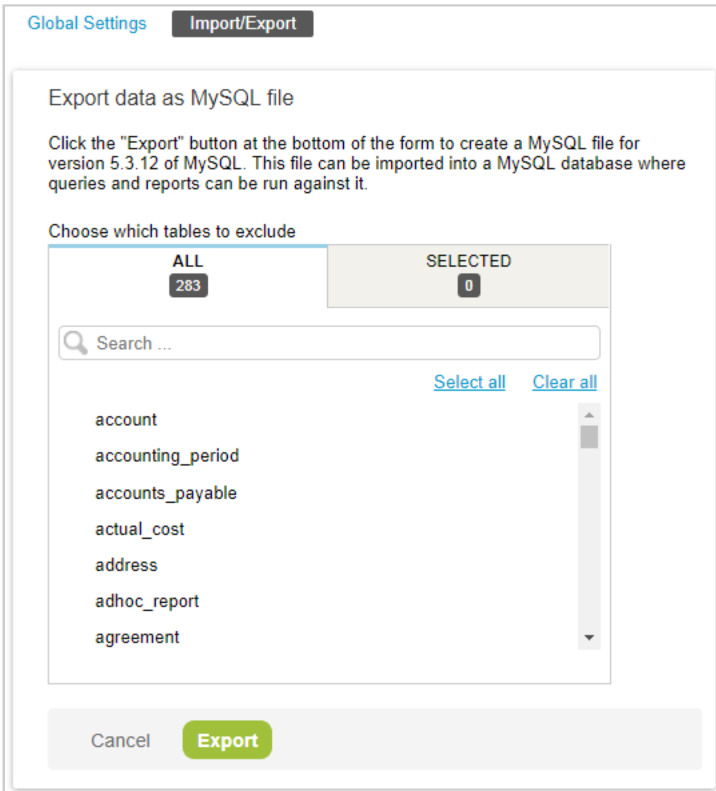
To export account data in MySQL format:

1. Go to Administration Global Settings > Account and click **Integration: Import/Export**.
2. In the Import/Export screen, click the **All data in MySQL format** link.
3. In the **Choose which tables to exclude** list, select any tables to exclude from the MySQL file.

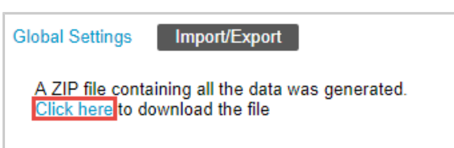
Tip: If you only want to include a small number of tables, first click Select all to exclude all tables, and then select the tables you want to include. In addition, audit trail information can increase table sizes by a significant amount. If you do not need audit trail information, select the “Suppress the audit field data” option, which may significantly reduce the size of the generated file, and generate results more quickly.

Warning: Some tables, such as **by_day**, are excluded from MySQL exports. These tables can be exported using the Automatic Backup Service (ABS). For more information about ABS, see Automatic Backup Service.

4. Click **Export**. OpenAir will create a ZIP file containing the generated data.



5. Click the **Click here** link to download the ZIP file with your data.



Exporting Your Account-Specific WSDL

You can export the WSDL specific to your account, which includes custom fields configured on your account. Account administrators and users with the Export data role permission and relevant access can use a short URL to download the file automatically.

To export your Account specific WSDL:

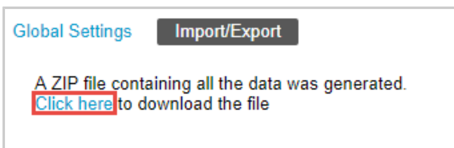
1. Go to Administration Global Settings > Account and click **Integration: Import/Export**.
2. In the Import/Export screen, click the **Account specific WSDL** link. Your account-specific WSDL will open in your browser.

Exporting the XSD Schema Files

Use this feature to export the XSD schema files without the need to contact OpenAir Customer Support.

To export the XSD schema files:

1. Go to Administration Global Settings > Account and click **Integration: Import/Export**.
2. In the Import/Export screen, click the **XSD schema files** link. OpenAir will create a ZIP file containing the generated data.
3. Click the **Click here** link to download the ZIP file with your data.



Licenses

Account administrators can review the number of user licenses purchased and used for your OpenAir account by license type. To do so, go to Administration > Global Settings > Account > Licenses.

The Licenses page is a useful reference to track licenses usage for your account.

There are three types of user license for OpenAir:

- **Timesheets and Expenses (T&E) Only** – For active users listed under Administration > Global Settings > Users > Employees who do not have a guest role and who have access to any combination of the Account, Expenses, and Timesheets OpenAir modules. T&E Only user licenses cannot be used instead of Full or Client (Guest) user licenses.
- **Full** – For active users listed under Administration > Global Settings > Users > Employees with access broader than that of Timesheets and Expenses users or Guest users. Full user licenses may be used instead of Time and Expenses or Client (Guest) user licenses, if these are used up.
- **Client (Guest)** – For active guest users listed under Administration > Global Settings > Users > Guests (users with a guest role). Client (Guest) user licenses cannot be used instead of Full or T&E Only user licenses. For more information about guest users, see Guest Roles and Guests.

For each type of user licenses, the page shows the number of user licenses purchased for your OpenAir account under the **Licenses** column, and the number of licenses currently in use under the **Active** column. The page also shows the Total number of licenses purchased and the total number of licenses currently in use.

The number of licenses currently in use corresponds to the number of active users (employee or guest records with the **Active** box checked).

Inactive users do not count toward your license usage, and user licenses are not tied to a specific user. However, you must hold enough user licenses of the appropriate type to cover the number of active users on your account.

The number of active users is shown in red color if it is larger than the number of licenses. OpenAir sends license compliance email alerts to account administrators when the number of active users exceeds the number of licenses that may be used for a certain type of users. License compliance email alerts are not sent if the Timesheets and Expenses Only or Guests (Clients) user licenses are exceeded but there are enough Full user licenses to cover the excess, for example.

If the number of active users exceeds the number of licenses, you should:

- Review the list of active employees, including which OpenAir modules they have access to, and the list of active guest users on your OpenAir account.

  > **Tip:** You can use the Employees account-wide tabular (detail) report and add the dimensions Employee ID, Name, Active, Account access, Expenses access, Timesheets access, Opportunities access, Projects access, Resources access, Purchases access, Invoices access, and Workspaces access to review active employee module access. See the help topic Module Access Overview.

- Take any appropriate action to reduce the number of active users.

  For example, you can remove any application access other than Account, Expenses, and Timesheets for an employee so that this employee takes up a T&E only user license instead of a full user license. For more information about controlling employee module access, see Access Control Overview.

  > **Tip:** You can use the bulk employee change wizard to change the module access settings for several employees at one time. See Making Changes to Multiple Employee Records at the Same Time.

  > **Tip:** The All Item Types in Calendar optional feature lets employees see their task assignments and bookings in the OpenAir calendar even if they do not have access to the Projects and Resources module. See the help topic All Item Types in Calendar.

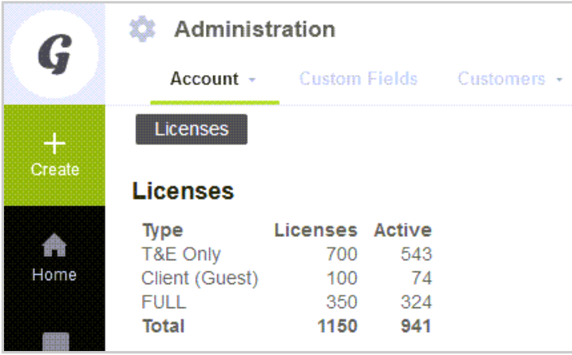
- Contact your OpenAir account manager, to review OpenAir licensing or purchase additional user licenses.

Limits are enforced to prevent you from creating or activating users if doing so would exceed the number of user licenses purchased for your account. If no user licenses of the appropriate type are available:

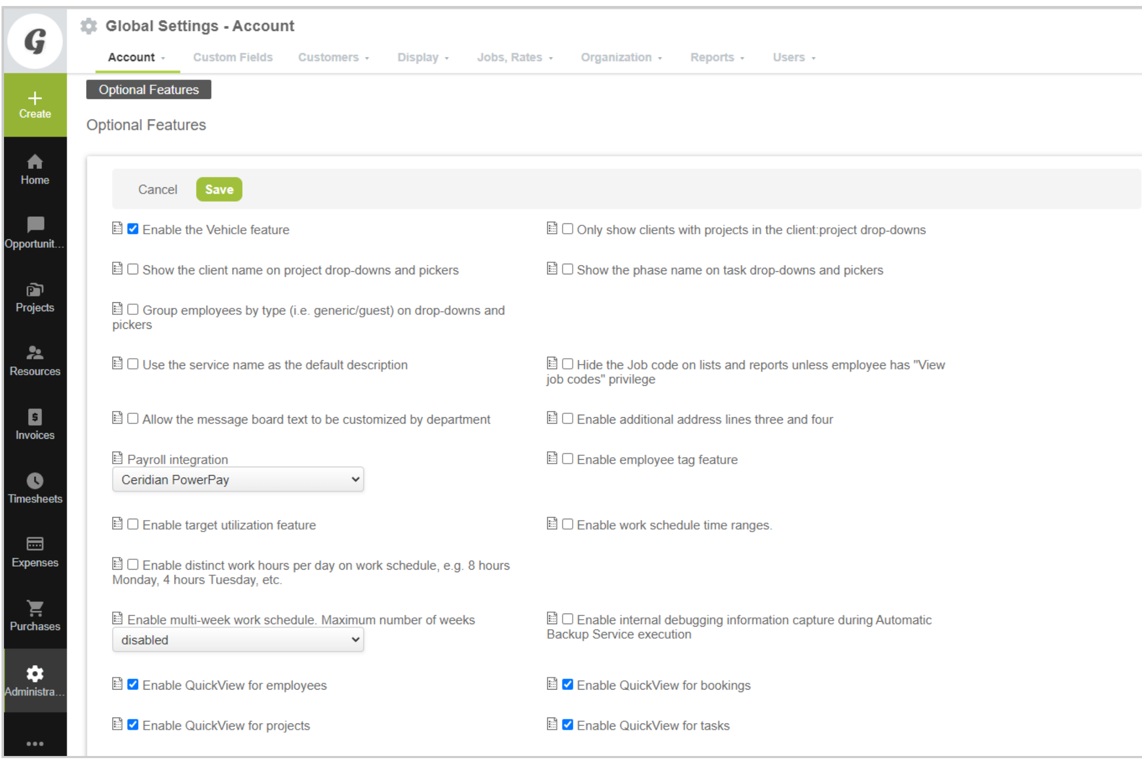
- When adding a new active user or checking the **Active** box on an existing employee or guest record using the OpenAir UI, OpenAir does not let you save the record if adding or activating the user.

  > **Note:** The New employee, or New guest user form shows the number of user licenses available that may be used for the type of user being added, if there are any.
  >
  > Depending on the default module access settings for new employees, the New employee form shows either the total number of T&E Only and Full user licenses available, or only the number of Full user licenses available. If you have no Full user licenses available, and your default module access for new employees includes modules other than Account, Timesheets and Expenses, for example, to add an active T&E user, you would need to create an inactive user, and remove access to modules other than Account, Timesheets and Expenses for this user, before you check the **Active** box.

- When adding a new user using OpenAir API, or when importing a employee record from NetSuite using OpenAir NetSuite Connector, the employee record is added and the **Active** box is cleared for that employee.



Optional Features



The Optional Features section contains options that impact general OpenAir usage and add features to entities such as Employee records. See Users.

To access Optional features:

1. Go to Administration > Global Settings > Account > Optional features.

Enable the Vehicle feature: When enabled, Vehicles display in the list of Application Settings under Invoices Settings and Expenses Settings. When one or more vehicles are set up in OpenAir, a Vehicle drop-down list is available on mileage receipts in the Expenses application and on mileage expense charges you create in the Invoices application. See Vehicles under Expenses for information about creating a vehicle in OpenAir.

Only show Customers with projects in the customer:project drop-downs: In many areas of OpenAir, the customer and project field is concatenated into a Customer:Project drop-down menu. Enabling this option populates the drop-down selections with customers that have a projects so you get a consistent Customer:Project value set. When this option is not enabled, customer names without projects also display in the drop-down menus such as Customer X, Customer X:Project Y. Displaying Customers without projects supports a design of recording time and expenses, handling resource allocation, and invoicing at the customer only level.

Show the customer name on project drop-downs and pickers: When writing reports or setting up filter sets, a pick list displays with projects. If this option is enabled, the customer name also displays at the end of the project name in these lists in parenthesis such as Project Y(Customer X). If this option is disabled, only the project name displays.

Show the phase name on task drop-downs and pickers: When handling time recording or resource allocation at the task level, this option enables OpenAir to include the phase name in parenthesis after the task name such as Task Y(Phase X). This is helpful if you have tasks with the same name within a project allocated to different phases [i.e., Design (Pilot), Design (Production)]. When this option is disabled, only the task name displays. Therefore, it is very important that task names are unique and clear.

Group employees by type (i.e., generic/guest) on drop-downs and pickers: This option provides a sorting or ordering approach to your employee based drop-downs so that different resource types (e.g., Regular, Guest, Generic) appear in groups within the menu. When enabled, generics and guests generally appear at the bottom of the menus, with each group ordered alphabetically. When disabled, generics and guests are listed within the regular employee list in alphabetic order with an identifier (generic or guest) after the employee name.

Use the service name as the default description: Throughout OpenAir, services are typically used to track categories of labor or accounting allocation information. However, there is no restriction on what a service can be used for within OpenAir. Due to its unique handling within OpenAir regarding its inclusion on timesheets and invoice charges, your OpenAir configuration may include using a service for something unique to your organization. The name of a service may align with how you view information for display on invoices, for example. In this case, instead of entering the description information separately as part of a billing rule or charge creation, you may enable this option to reuse the service name. Enabling this option usually assumes that time is tracked to a task level, and that either the time entry or the task itself holds a service. When this option is disabled, you must manually enter the description field.

Hide the Job code on lists and reports unless employee has "View job codes" privilege: With the ability to use the job code in many report filtering options and to be able to override the job code field name using terminology override, the job code becomes an area that may be used to capture sensitive information related to a person's job category or level. This is information that, more likely than not, should not be available to everyone in the organization. If you have configured OpenAir to have sensitive information in this area, you can use this option so that employees who have permission to view job codes may only view the job code value of his/her own record. With this option enabled, the job code field is hidden throughout OpenAir such as on reports and in the customized page lists. If this option is disabled, then the job code is available throughout OpenAir as a regular field on reports and customize lists which support the field.

Allow the message board text to be customized by department: The Home application has a central Message Board that is used to communicate to OpenAir users. In many cases, more than one department in a company may be set up to use the OpenAir environment and they can be performing different functions. For example, Sales and Operations may be using timesheet entry but the data entry policies for those two departments may be different. Setting up departments within OpenAir lets you allocate employees to a specific department. The Message Board text by department option gives you the ability to set up message board communications to specific groups of employees. The text is entered in the Departments entity and overrides the general message board content. See Departments. If you have this option selected and no specific department text has been created, the general message board text is visible. If this option is not enabled, the general message board is visible to all employees.

Enable additional address lines three and four: This option expands the Customer and Employee address fields to allow for a 3rd and 4th line, which displays on formatted reports such as invoices or timesheets.

Payroll integration (drop-down list): OpenAir enables the integration with the following payroll systems: Ceridian PowerPay, Paychex, ADP-PCT and ADP-NobleStar. This is an optional service providing your company subscribes to the payroll systems.

Enable employee tag feature: The employee tag feature enables the tracking of custom field information in a defined tag field over time. Each tag entry is associated with a timeframe (current or start/end date). As with custom fields, you may define as many tag groups as you need with as many values in each tag group as you need. The enabling of the tag group feature displays a tag link on the Employee accounts for value setting. Tag groups may be used to filter information on reports. See Tag Groups and Employee Entity Tag.

The main differences between employee-based custom fields and tag groups are:

- Tag group values are tracked over time
- Tag groups may be restricted from viewing within an employee's role in OpenAir

Custom fields may also be restricted from viewing within an employee's role. However, this must be done through form permissions and still give employees the ability to view custom field information in reports. Custom fields also do not track values over time. When the field is set or changed, that is the field value for current and historical reporting.

Enable target utilization feature: The target utilization feature enables the tracking of an employee's utilization % target in a defined field over time. Each utilization entry is associated with a timeframe (current or start/end date). The enabling of the target utilization feature displays a Target Utilization link on the Employee accounts for value setting. See Target Utilization.

Enable work schedule time ranges: The overall use of this optional feature is to control resource bookings from a start time point in a day. For example: If a workday is defined as 8:00 a.m. to 4:00 p.m. and an employee is booked to work 100% of the time starting at 10 a.m. for the day, the number of hours would compute to 6 hours of effort. To use this feature, you must set up work schedules in OpenAir to have a start/end time definition per day and an optional override at the employee work schedule level on the start/end time of the day. See Work Schedules.

Enable distinct work hours per day on work schedule, e.g. 8 hours Monday, 4 hours Tuesday, etc.: enables work hours to be scheduled for a different number of hours for each work day. When reports use work schedule hours, the hours vary based on the work schedule. For any report where hours are converted to days, the average hours for the week is used for the calculation. When enabled, the work hours per day can be assigned to both work schedules and to individual employees.

> **Important:** Varying the work hours per day definition impacts daily billing rules. If the day is defined as 4 hours and an 8 hour workday is entered on timesheets, the billing rules treats this as 2 days of work.

Enable multi-week work schedule. Maximum number of weeks: The multi-week work schedule feature enables using a varying work schedule that spans several weeks. For example, a schedule may be 4 10-hour days, 1 4-hour day in week one and 5 8-hour days in week two. This enables resource managers to know exactly when resources are available based on varying weekly work schedules. Choose Disabled or 2-, 3- or 4 weeks as the duration of the varying schedule.

Enable internal debugging information capture during Automatic Backup Service execution: Useful for OpenAir engineers to debug Automatic Backup Service (ABS) problems.

Enable QuickViews for bookings, **Enable QuickViews for employees**, **Enable QuickViews for projects**, **Enable QuickViews for tasks**: Control QuickViews availability for each record type. For more information about QuickViews, see OpenAir User Guide.

Enable shortcuts: When enabled, account users can create navigation shortcuts to any page in and outside OpenAir from anywhere in OpenAir. Users can then spend less time navigating and more time getting things done. For more information about creating and using shortcuts, see the help topic Shortcuts.

Maximum number of shortcuts a user can save: By default, each user can have a maximum of 50 navigation shortcuts at any one time. Enter a number between 1 and 50 to reduce the maximum number of shortcuts allowed.

Performance

OpenAir reschedules, deactivates, or skips certain billing, automated revenue recognition and project recalculation for projects with no recent activity to optimize performance. This prevents automated billing and revenue recognition runs being delayed because there are too many of these automated runs scheduled to run at the same time. Project recalculation on completed projects which are still marked as active in OpenAir can also use substantial system resources and impact all OpenAir users.

This standard performance feature is always active. To change the configuration settings, go to Administration > Global Settings > Account > Performance. Only account administrators and users with the **Perform company maintenance functions** role permission can view and change the settings on the performance page (or performance console).

Important: Review the following guidelines:

- This feature may cause OpenAir not to run auto-billing, auto-recognition, and project recalculation for projects which experience long downtime periods between billing milestones or other recalculation points, as these projects can appear to be inactive to OpenAir, even when not marked as such.
- You should not disable project recalculation for projects which require further updates to their percent complete status, assignment utilization, or for which dates of tasks may need to be changed.

Automated Billing and Revenue Recognition

OpenAir lets you set billing and revenue recognition to run automatically for each project. For more information about billing and revenue recognition autorun, see Auto-Billing and Running Revenue Recognition Automatically.

You can configure OpenAir to reschedule or deactivate automated billing or automated revenue recognition for a project if no billing or revenue recognition transactions were created in the recent past.

- To configure the performance settings for automated billing, go to Administration > Global Settings > Account > Performance > Auto-bill.
- To configure the performance settings for automated revenue recognition, go to Administration > Global Settings > Account > Performance > Auto-rec.

You can set the following thresholds for both processes:

- **Reschedule action** – Enter the number of days after which the automated process should be rescheduled to run one time every month. The threshold must be between 7 and 180 days. The default threshold is 120 days.

  If the automated process was scheduled to run every day, on the 1st and 15th of every month, or on the 15th and last day of the month, and there were no transactions created in that period, OpenAir will now run one time every month.

- **Deactivate action** – Enter the number of days after which the automated process should be deactivated. The threshold must be between 30 and 500 days. The default threshold is 400 days.

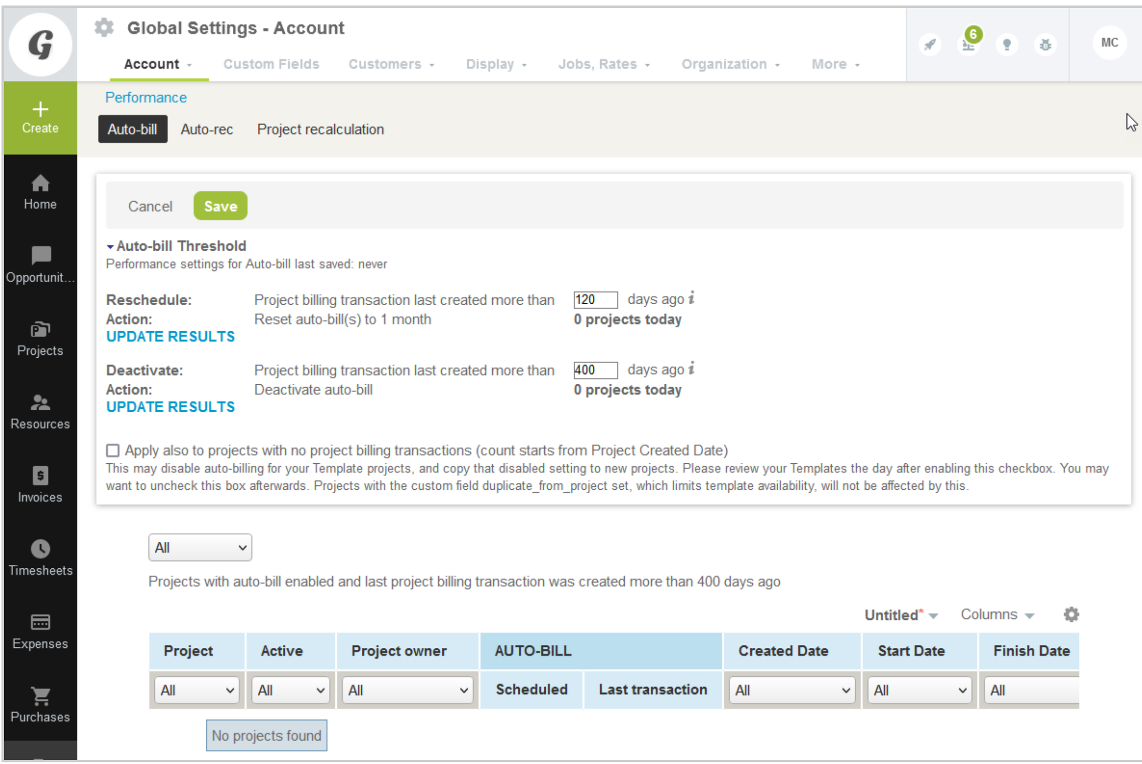
  If there were no transactions created in that period, the billing or revenue recognition auto-run is deactivated.

By default, these actions apply if transactions exist for the project. To apply these actions to projects with no billing transactions or no revenue recognition transactions, check the **Apply also to projects with no project <transaction type> transactions**.

The form shows the number of impacted projects and updates this number as you change the settings.

The page also includes the list of impacted projects. The list is not updated as you make changes – you must click **Update results** to view the updated project list.

> **Important:** This feature may disable auto-billing for template projects, and for new projects that you create from those templates. If you check the **Apply also to projects with no project <transaction type> transactions** box, review your template projects the following day. This setting does not affect projects using the duplicate_from_project custom field setting.



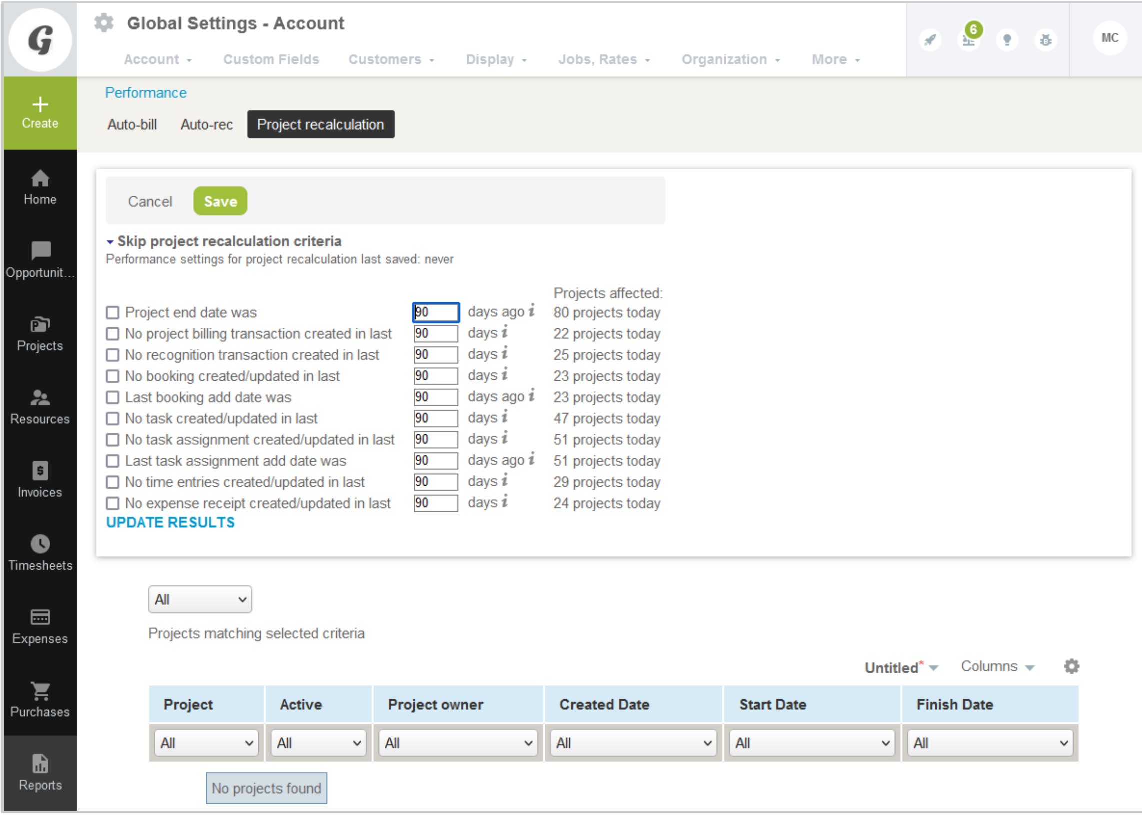
Project Recalculation

You can configure OpenAir to skip project recalculations under selected conditions. This allows you to avoid resource-demanding project recalculations which are no longer necessary, and improves overall performance.

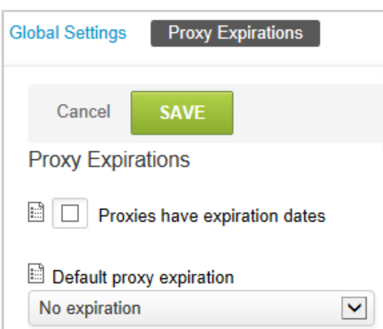
To configure the performance settings for project recalculation, go to Administration > Global Settings > Account > Performance > Project recalculation.

Check the boxes for all the conditions that must be met to skip recalculation for a project, and enter the threshold number of days for each condition. The threshold must be between 1 and 500 days. The default threshold is 90 days.

Note: If you select more than one condition, OpenAir skips recalculation only if the project meets all the selected conditions (AND logical operator).



Proxy Expirations



The Proxy feature within OpenAir enables a user permission to login and act as another OpenAir user without the need of the other user's password. See Log in as....

To access Proxy expirations:

1. Go to Administration > Global Settings > Account > Proxy Expirations.

Proxies have expiration dates: The expiration option lets you control how long a proxy can be active or used. This feature is useful when setting up a proxy for an employee covering another employee's tasks while they are on vacation or on leave. Enabling this feature requires you to identify the default proxy expiration. If this feature is active and No expiration is set as the default, then the proxy setup functions as if the expiration feature was turned off. This may be overridden for each proxy set up within an employee account. If an expiration date is set up with the proxy, the expiration happens at midnight of the account time zone leading up to the date that is set.

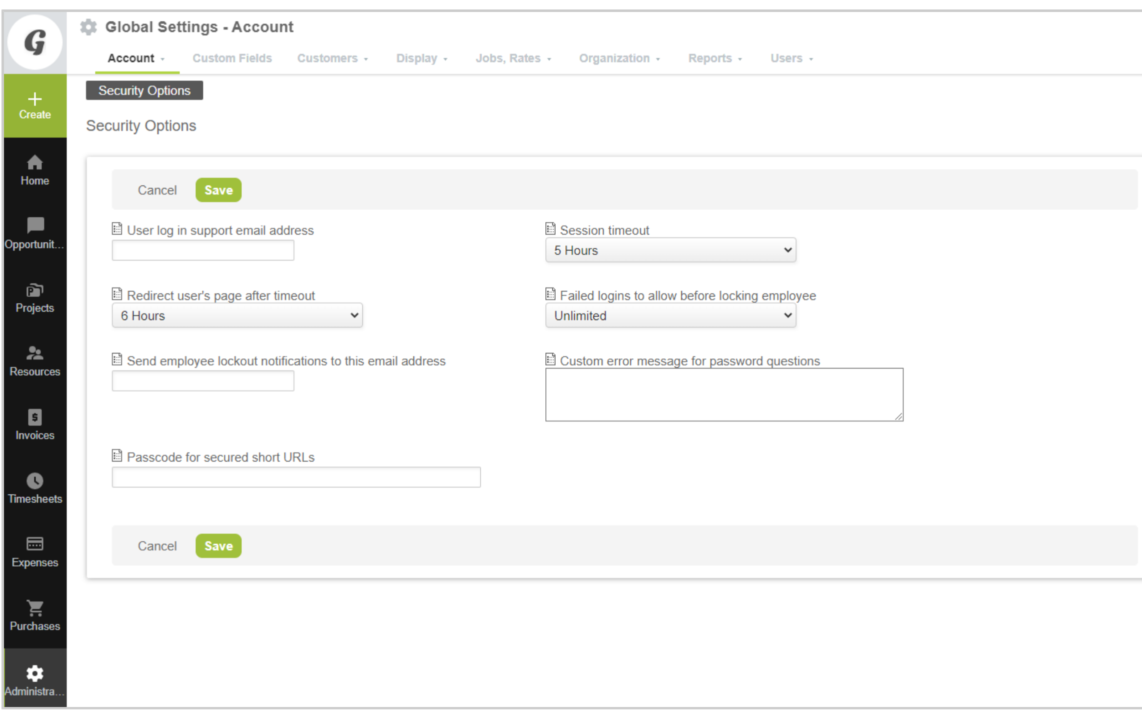
Default proxy expiration: The other selections from the drop-down list for expiration include various time periods, which will allow OpenAir to compute an expiration date for the proxy from when it was initially created for an employee.

Security

Security focuses on protecting your OpenAir environment from employees trying to access OpenAir without proper permission or the sharing or showing of information to others.

Go to Administration > Global Settings > Account > Security. You can control the following features from the Security administration form:

- Two-Factor Authentication — Two-factor authentication adds more security to OpenAir with an extra verification step during sign-in.
- Employee Lockout — Employee lockout is a security feature that ensures employees have an active account and have knowledge of the password to access OpenAir.
- Session Timeout — The session timeout features ensures users need to re-enter either their passwords or their full credentials after a given period without user interaction.
- Secured Short URLs — Control access to the online invoice URL that OpenAir generates automatically when an invoice is created.



Employee Lockout

Employee lockout is a security feature that ensures employees have an active account and have knowledge of the password to access OpenAir.

> **Important:** OpenAir Customer Support cannot act as an administrator for company specific data-related items such as unlocking employee accounts or resetting passwords. As an account administrator, you perform these tasks for your company.

Account administrators can control the following Employee lockout options. To do so, go to Administration > Global Settings > Account > Security, and use the instructions for each of the following setting on the Security form.

- **Failed logins to allow before locking employee** — Select a value from the dropdown list. This is the number of times an employee can attempt to login using an incorrect password.

  > **Note:** Locked employees see the same on-screen error message on the OpenAir login screen whether the employee credentials are invalid or the employee is locked out of OpenAir.
  >
  > By default, OpenAir sends a lockout notification email to the employee when the employee exceeds the number of login attempts permitted.
  >
  > Lockout notification email can be disabled for your account. To stop OpenAir sending lockout notification email to employees being locked, contact OpenAir Customer Support.

- **Send employee lockout notifications to this email address** — Enter an email address. When a user reaches the maximum number of login attempts and is locked out, an email notification is sent automatically to the address supplied in this field. The email includes the name of the employee so account administrators within your company can follow the appropriate password reset procedure. Typically, administrators unlock the user account and send an email notification to the employee or reset their password reset and notify them verbally or by email. OpenAir Customer Support is not allowed to unlock employees — you should include the email address of one of the administrators for your OpenAir account.

  > **Note:** You can specify multiple email addresses separated by semi-colons. However, depending on how long your email addresses are within your company, you may be able to enter only one to three. A better option would be to set up an email distribution list and use this in the notification field. Then your distribution list can be expanded as your list of contact employees grows or modified as your organization changes.
  >
  > Create an email distribution list if you have more than one office location or department using OpenAir. Appoint ownership of various general employees to specific individuals on this distribution list or allow a primary and backup support structure within your environment.

- **Employee log in support email address** — Enter an email address or the alias for an email distribution list. Typically, this should include the email address for your company's Help Desk. If an email address is specified, OpenAir Customer Support will direct employees to the email address provided in this field for any access issue such as unlocking employee accounts or resetting passwords.

  > **Tip:** Create an email distribution list if you have more than one office location or department using OpenAir. Appoint ownership of various general employees to specific employees on this distribution list or allow a primary and backup support structure within your environment.

Users have the following recourse if they forget their password or need help with unlocking their user account:

- Users can click the **Forgot your password or ID?** link on the OpenAir login page and enter the email address associated with their OpenAir user account. If the email address supplied is associated with an active OpenAir user account, OpenAir sends an email to that address containing the Company ID, the User ID as well as the password hint entered by the user when setting their password. For more information, see the help topic Signing In Using Your OpenAir Sign-In Details.
- Users may contact any of their account administrators to request a password reset or to obtain help with unlocking their account. Account administrators can then set a temporary password from the Demographic settings form on the employee record in OpenAir. See Demographic.

> **Note:** Administrators who need help with resetting their password or unlocking their OpenAir user account should obtain help from other account administrators, or contact OpenAir Customer Support if there is only one administrator for the OpenAir account.

- If the Password Security Questions optional feature is enabled for your account, users can click the **Reset password or unlock account** link on the OpenAir login page and regain access to OpenAir by answering a security challenge.

  To enable the Password Security Questions feature, contact OpenAir Customer Support.

> **Note:** Review the following guidelines:
>
> - If the Password Security Questions feature is not enabled and a user attempts to regain access to OpenAir using this method, an error message appears. To specify a custom error message, go to Administration > Global Settings > Account > Security. and enter the custom message in the **Custom error message for password questions** box. You can use this custom message to provide the user some information about opening a ticket with your company's internal help desk, for example.
> - If you require answers to the security questions to have a minimum lengths, contact OpenAir Customer Support and request to change the minimum number of characters each answer must contain to a specific value.
> - System emails are disabled by default on sandbox accounts. The **Forgot your password or ID?** and **Reset password or unlock account** links can therefore only be used for production accounts.

For more information about the Password Security Questions feature, see the help topics Password Security Questions, Setting Up Security Questions and Resetting Your OpenAir Password.

Session Timeout

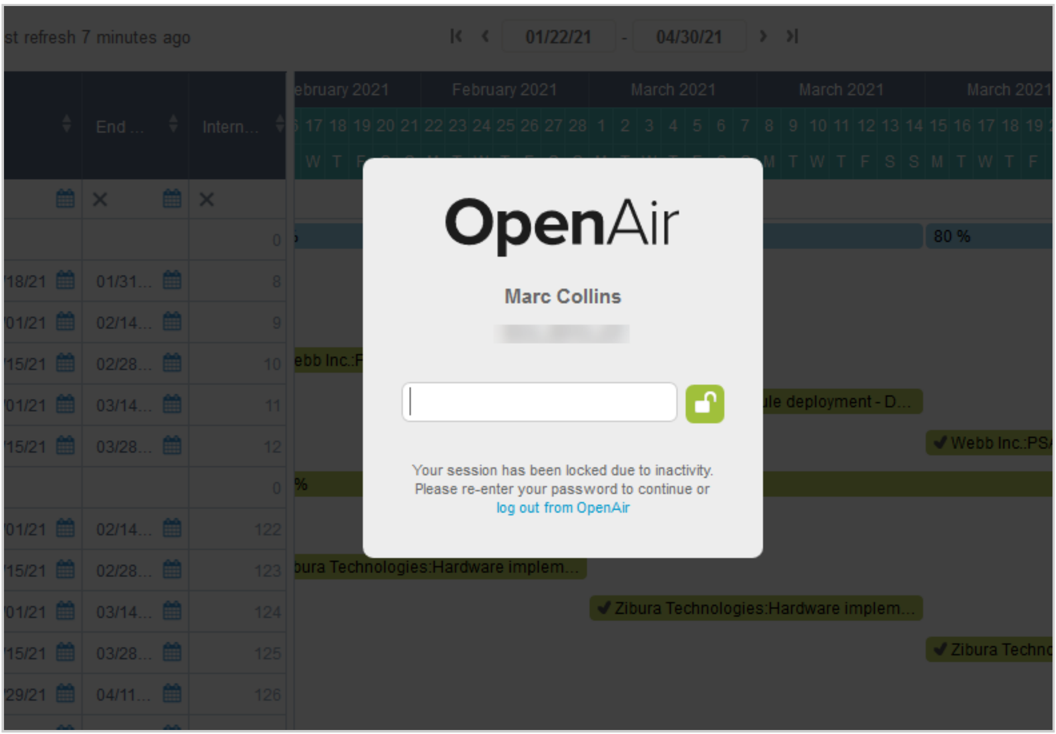
The session timeout features ensures users need to re-enter either their passwords or their full credentials after a given period without user interaction.

Account administrators can set the **Session timeout** and **Redirect user's page after timeout** periods in Administration > Global Settings > Account > Security Options:

- **Session timeout:** This option controls the time a session may be inactive before the employee is automatically locked out and prompted to re-enter their password. Session timeout avoids OpenAir sessions from being used by others on a shared machine. Session timeouts should be set according to the data security policies your company has in place. The default and maximum period for the session timeout is 5 hours.

> **Note:** If you factor in that employees of OpenAir fall into different categories such as power employees who use OpenAir all the time and timesheet employees who use OpenAir perhaps one time a week, you should select a value that will not inhibit the power employee audience. This is generally a 30 minute to 1 hour window.

- **Redirect user's page after timeout:** This option controls the time a session may be locked out before the employee is automatically logged out and redirected. The employee will be redirected either to the OpenAir login page or to the alternate URL configured in Administration > Global Settings > Account > Integration: SAML Single Sign-On, if this feature is enabled on your account. This option can be set to "On timeout" or to a finite period up to a maximum of 6 hours. It should be set according to the data security policies your company has in place.



Secured Short URLs

OpenAir generates a short URL for viewing the invoice online when an invoice is created. By default, anybody with the short URL can view the invoice online without signing in to OpenAir.

You can limit access to invoice short URLs generated in future by setting a passcode. When accessing the short URL for an online invoice, users will need to enter the passcode before they can view the invoice.

To set a passcode for secured short URLs:

1. In OpenAir, go to Administration > Global Settings > Account > Security.
2. Enter a **Passcode for secured short URLs**.
3. Click **Save**.

   All invoice short URLs generated after you set a passcode will be protected

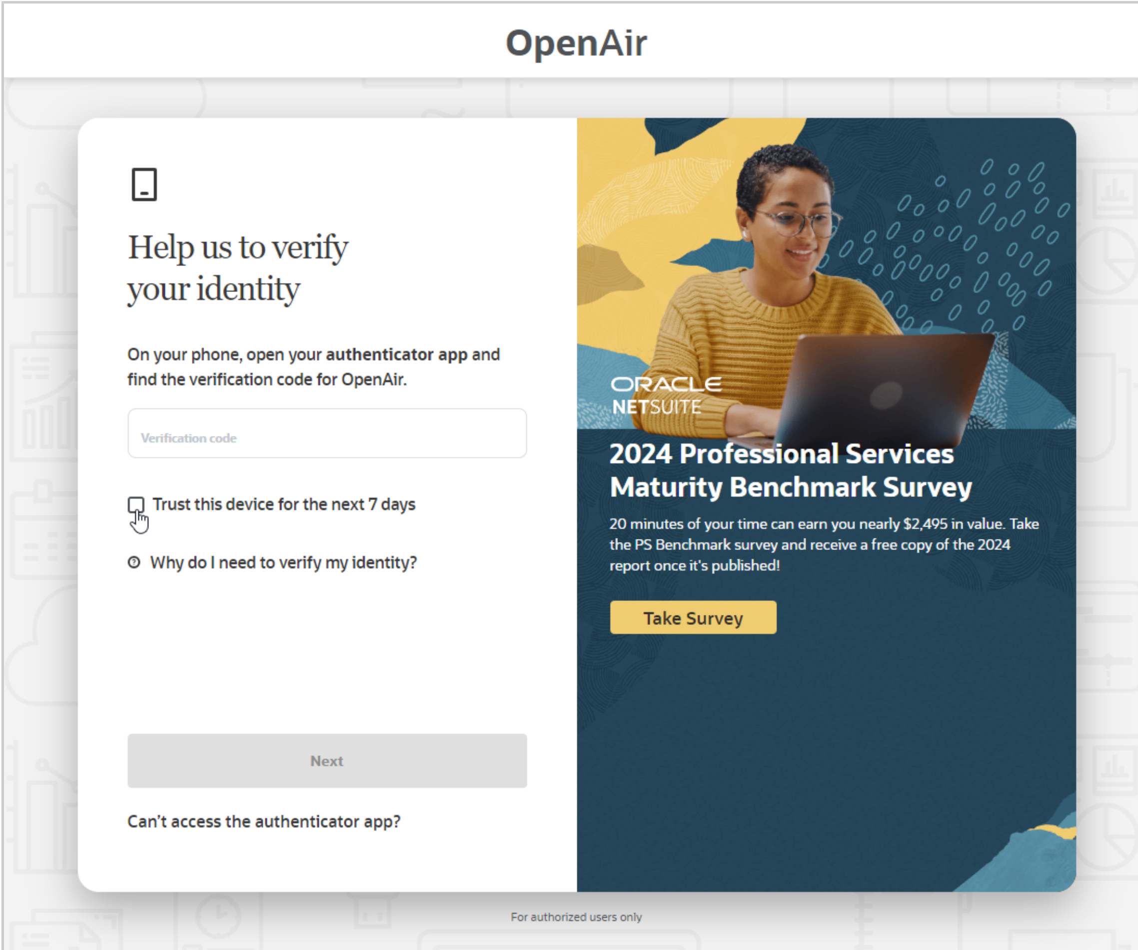
Important: Review the following guidelines:

- An invoice short URL is secured only if **Passcode for secured short URLs** does not have a null value at the time when the invoice is created and the invoice short URL is generated.
- If you are setting a passcode for the first time, short URLs for invoices created before you set the passcode are not secured.
- If you change the passcode, the new password applies to **all** secured short URLs. Users accessing secured short URLs generated with the old password must enter the new password.
- If you clear the **Passcode for secured short URLs**, users accessing secured short URLs can view the invoice online without entering a password. The password prompt does not appear.

Two-Factor Authentication

Add more security to OpenAir with an extra verification step during sign-in.

Two-factor authentication (2FA) adds a second level of security when you sign in to the OpenAir user interface. To sign in using 2FA, you must first enter your OpenAir user credentials (company ID, user ID and password) and then enter a time-based verification code generated by an authenticator app for each sign-in.



Note: Currently, OpenAir supports only time-based verification code from an authenticator app as second factor.

The authenticator app must comply with the OATH TOTP standard. OATH stands for the Initiative for Open Authentication. TOTP stands for time-based one-time password.

To enable 2FA for your account, go to Administration > Global Settings > Account > Security, check the **Two-factor authentication** box, and click **Save**.

After you enable 2FA for your account:

- Account administrators can control 2FA settings for the OpenAir account and enroll users to sign in using 2FA. See Managing two-factor authentication in OpenAir.
- Enrolled OpenAir users must setup 2FA within a set number of days or sign-ins. For more information, see the help topic Signing In Using Two-Factor Authentication (2FA).

Managing two-factor authentication in OpenAir

After you enable 2FA for your company's OpenAir account, you can:

- Control 2FA settings. To do so, go to Administration > Global Settings > Account > Two-factor authentication.

  - When you enroll a user to sign-in using 2FA, this user can skip the 2FA setup for a limited number of days and sign-ins. You can control the number of **Days until 2FA setup is required** and the number of **Sign-ins until 2FA setup is required**.
  - Check the **Trust devices** box to allows users to add the device they sign in from as a trusted devices. This will let the same user sign in to OpenAir on the same device without being asked to enter a verification code every time. Each device is trusted for a limited number of days, after which it is removed automatically from the list of trusted devices for your company's OpenAir account. You can specify the number of **Days until a trusted device is removed**. A user's trusted devices are removed automatically when the user changes password.

    > **Important:** Clearing the **Trust devices** box removes all trusted devices for all users.

- Enroll or disenroll users to sign in using 2FA.
- Add the following columns to the employees list view for auditing purposes:
  - **2FA required** – The column indicates whether a user is enrolled to sign in using 2FA (`Required`), not enrolled (`Not required`), or accessing OpenAir using single sign-on (empty value).
  - **2FA status** – The column indicates whether a user has completed the 2FA setup (`Setup`), not completed it yet (`Required`), or is not enrolled to sign in using 2FA (empty value).
  - **Complete 2FA setup by** – The column shows the deadline when the user must set up 2FA by.
- Reset two-factor authentication or remove trusted devices for one user from Administration > Global Settings > Users > Employees > [*Select an employee*] > Two-factor authentication.
- Disable 2FA temporarily for your account. To disable 2FA, go to Administration > Global Settings > Account > Security, clear the **Enable two-factor authentication** box, and click **Save**.

> **Note:** Disabling 2FA temporarily for your account does not remove 2FA setup-related information for users. After you enable 2FA again, users will not need to set up 2FA again.

Enroll or disenroll users to sign in using 2FA

Use the following steps to enroll or disenroll users to sign in to your company's OpenAir account using 2FA.

When you disenroll a user, all 2FA setup-related information for this user is removed. If you enroll that same user again, the user will need to setup 2FA again and will be able to skip 2FA setup up to the number of times and days specified in the two-factor authentication settings for your company's account.

To enroll or disenroll users to sign in using 2FA:

1. In OpenAir, go to Administration > Global Settings > Users > Employees > [*Select an employee*] > Demographic.
2. Check the **Two-factor authentication required** box to enroll the user. Clear the box to disenroll the user.
3. Click **Save**.

   After you enroll a user, the demographic form shows "User must complete 2FA setup by <date>" under the **Two-factor authentication required** box.
4. Repeat for each user you want to enroll to sign in using 2FA.

Note: Two-factor authentication is not available for users accessing OpenAir using single sign-on. Saving the form returns an error if both the **Two-factor authentication required** and `saml_auth` boxes are checked.

You can use the bulk employee change wizard to copy the value of the **Two-factor authentication required** box to other user records in your company's OpenAir Account. See Making Changes to Multiple Employee Records at the Same Time.

You can use OpenAir XML API and SOAP API, or OpenAir Integration Manager to modify the value of the **Two-factor authentication required** [`mfa_status`] box for multiple users.

Custom Fields

OpenAir comes with standard fields but you may find that there are other items you would like to track throughout OpenAir. To accommodate this, you can define custom fields for specific objects in OpenAir.

Custom fields are used in OpenAir for a variety of purposes:

- You can create custom fields to extend the standard OpenAir forms to track additional information.
- You can create custom fields to extend the internal entities (data items) stored by OpenAir.
- OpenAir also uses custom fields to support additional features and integrations.

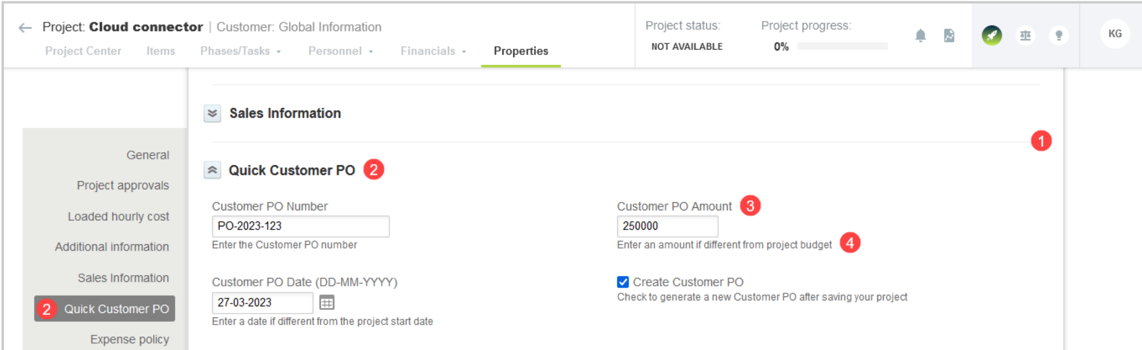
Note: You can create custom fields associated with project employee combination rate records used for project employee billing and project billing. When creating the new custom field, select Uprate (API only) from the **Add custom field to** dropdown. The Uprate (API only) entity appears under Global in the dropdown. The custom field will be available through the OpenAir XML API and SOAP API only. It will not be available on any form in OpenAir.

Important: Do not rename or amend these OpenAir custom fields as this will prevent the feature/integration from working as intended.

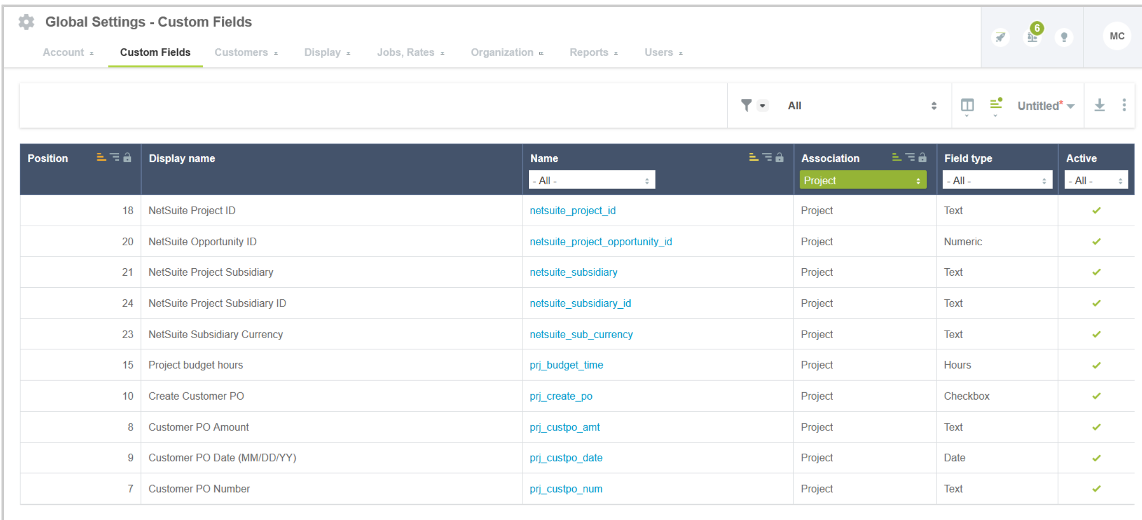
Custom fields display in a group based on the entity association, see Record Types and Forms Supporting Custom Fields. The group defaults to the bottom of the specific form on which they display. Form Permission Rules rules help in hiding or showing certain custom fields given certain events.

You can use the following properties to control how the custom field appears on the form:

1. Divider – Dividers are used to separate different sections of the form.
2. Divider text – Form section header.
3. Display name
4. Hint



You can view and edit custom fields from **Administration > Global Settings > Custom Fields**.



Position	Display name	Name	Association	Field type	Active
		- All -	Project	- All -	- All -
18	NetSuite Project ID	netsuite_project_id	Project	Text	✓
20	NetSuite Opportunity ID	netsuite_project_opportunity_id	Project	Numeric	✓
21	NetSuite Project Subsidiary	netsuite_subsidiary	Project	Text	✓
24	NetSuite Project Subsidiary ID	netsuite_subsidiary_id	Project	Text	✓
23	NetSuite Subsidiary Currency	netsuite_sub_currency	Project	Text	✓
15	Project budget hours	prj_budget_time	Project	Hours	✓
10	Create Customer PO	prj_create_po	Project	Checkbox	✓
8	Customer PO Amount	prj_custpo_amt	Project	Text	✓
9	Customer PO Date (MM/DD/YY)	prj_custpo_date	Project	Date	✓
7	Customer PO Number	prj_custpo_num	Project	Text	✓

Custom Field Rules

- You can create a new custom field from anywhere in OpenAir. To do so, select **Custom fields** from the **Create Button**
- When creating a custom field, you associate it with a particular object in OpenAir along with the type of field you are creating. The Association dropdown appears all areas of OpenAir where you may create custom fields.

> **Note:** After a custom field has been created and associated with an object or form in OpenAir, it cannot be changed to another form or object

- For each custom field, you must define a name that contains no spaces. You may use underscores. This name is used within the OpenAir database.
- You must also include a display name that users see on the form.
- You can enter a hint that displays below the field explaining the intended use of the custom field.
- There is no limit to the number of custom fields you can create.
- By default, newly created custom fields are positioned at the bottom of the form, see **Display Custom Fields before form field** in Form options. After you create new custom field, you can modify the custom field to change its position, see Custom Field Position.
- After a custom field has been created it cannot be deleted if it has been used.

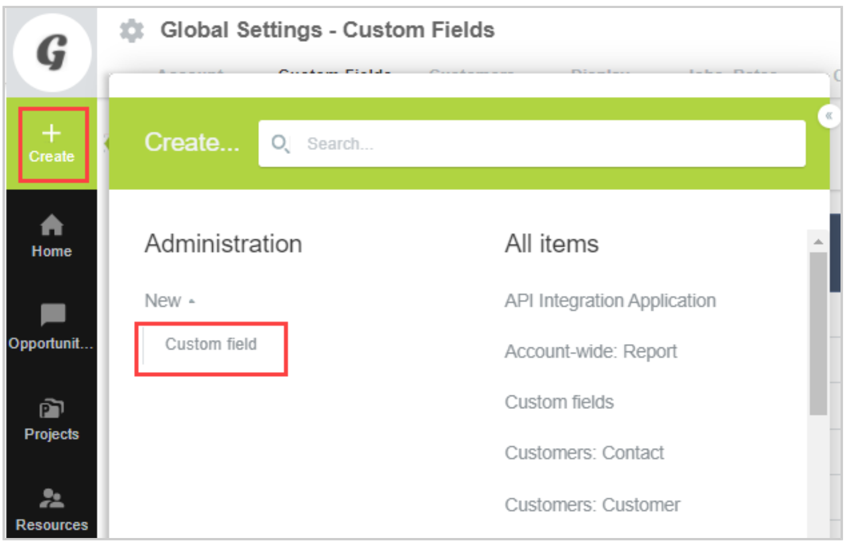
Tip: If you no longer need a custom field you can set it as not **Active**.

For step-by-step information about how to create and define a custom field, see Creating and Modifying Custom Fields.

Creating and Modifying Custom Fields

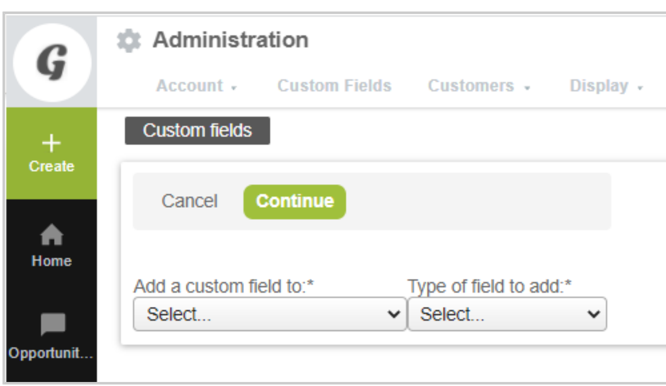
To create a custom field:

1. You can create a new custom field from anywhere in OpenAir. To do so, select **Custom fields** from the **Create Button**.



2. Select the entity the custom field is associated with along with the type of field you are creating. Click Continue.

Note: After you have created a custom field, the entity and type of field cannot be changed. See Record Types and Forms Supporting Custom Fields for details on the available entities and see Custom Field Types for details on the types of fields.



3. Fill out the custom field form values. See Defining Custom Fields.
4. Click Save.

Note: To change the position a field displays see Custom Field Position.

To view, modify, and delete a custom field:

1. Go to **Administration > Global Settings > Custom Fields**.
2. To view or modify an existing custom field, click on the name of the custom field.

   Note: The position field shows the order in which the fields are displayed on the form. See Custom Field Position.

3. Do one of the following:
   - Click **Save** to save the changes you have made to the custom field.
   - Click **Cancel** to undo any changes you have made.
   - Click **Delete** to delete the custom field. You will be prompted to confirm that you really want to delete the custom field.

     Note: You only have the option to delete the custom field if it has not been used. You can, however, always set the custom field as not active, and you can rename the custom field.

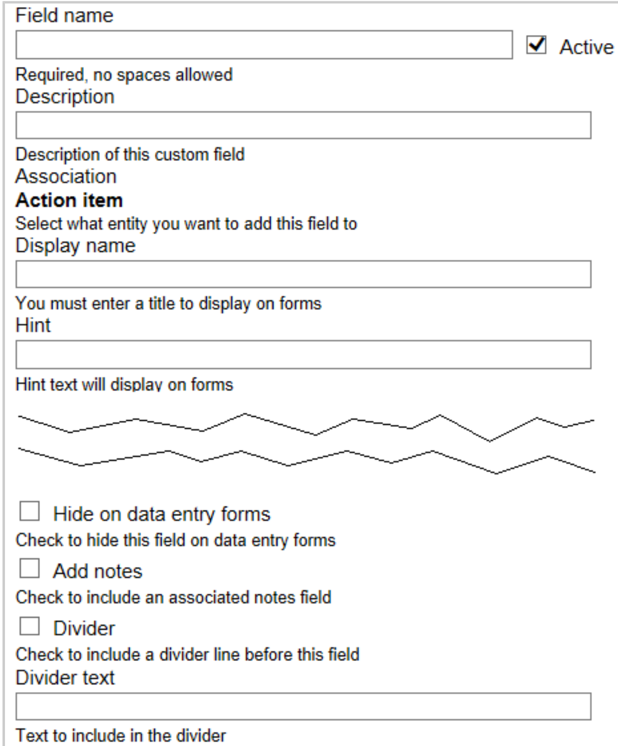
   See Defining Custom Fields for details on changing the field values.

Defining Custom Fields

To define a custom field:

1. Go to Administration > Global Settings > Custom Fields > [*select or create a custom field*].

   The custom field form appears.



2. Type the **Field name**. This is required and must be unique. The name cannot have any spaces, but you can use underscores. The name can not start with a number. The **Field name** is used internally and maybe used in reports, API calls and user scripts.

> **Important:** Changing the name of a custom field that is in use may break existing reports, integrations, and user scripts.

3. Check the **Active** box.

> **Note:** If **Active** in not checked then it will not be visible in OpenAir and will not be available on forms, reports or API calls. You can check active again to bring it back. Clearing the **Active** box will not delete any data stored for it in the database

> **Important:** Custom fields cannot be deleted if they have been used. If you no longer need a custom field you can set it as not **Active**.

4. Type a **Description**. This is optional and is used for adding information about the new custom field. You will see the description when you go to Administration > Global Settings > Custom Fields. See Creating and Modifying Custom Fields.

> **Note:** If you do not enter a description then the text "No Description" will be displayed.

5. Type the **Display name** (maximum 75 characters). This is required and is used to label the custom field on the form associated with the entity.
6. If required, type a **Hint** (maximum 75 characters) to help your OpenAir users understand the intent of the custom field.
7. Fill out the specific fields for the selected type of custom files. See Custom Field Types for details.
8. If you check the **Hide on data entry forms** box, this custom field does not display on the form.

9. If you check the **Add notes** box, a text box displays under the custom field for users to add any additional notes.
10. Set the **Divider** and **Divider text** as required, see Dividers and Sections.

> **Note:** The **Position** drop-down is available after you have saved a new custom field. You can then modify the custom field to set the position. See Custom Field Position.

Dividers and Sections

You can create a section and divider line when you create or modify a custom field.

If you select the check box for Divider, a divider line displays before the custom field. You can also type Divider text that creates a new section at the bottom of the form.

> **Note:** If you enter the same Divider text into two custom fields, you will end up with two section created with the same name.

To place a custom field into a section:

1. Go to Administration > Global Settings > Custom Fields.
2. Click on the name of the custom field.
3. Select the **Divider** checkbox to display a divider line directly above the custom field if required.

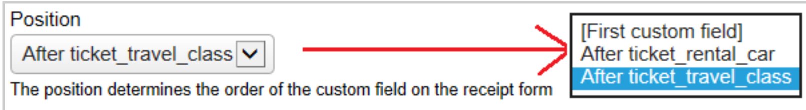
   You may want to use divider lines when you are defining a new section that needs to stand out on the form. For example, a series of custom fields defining a topic such as contract management may start with a Contract received check box. The divider line indicates the start of the contract management fields. The divider line does not determine which section the custom field is included in.
4. Enter **Divider text to create a new section.**

   > **Tip:** To add multiple custom fields to the same section, set the **Divider text** for the custom field in the first position, but leave the **Divider text** blank for the following custom fields.
5. Click Save.

> **Note:** The display of the divider before custom fields can disabled by Form options.

Custom Field Position

The **Position** drop-down is available after you have saved a new custom field. You can then modify the custom field to set the position.



To set a custom field position:

1. Go to Administration > Global Settings > Custom Fields.
2. Click on the name of the custom field.
3. Select the desired setting from the **Position** drop-down list.

   You can either specify the field as the *[First custom field]* or specify an existing custom field that this field should be displayed directly after.

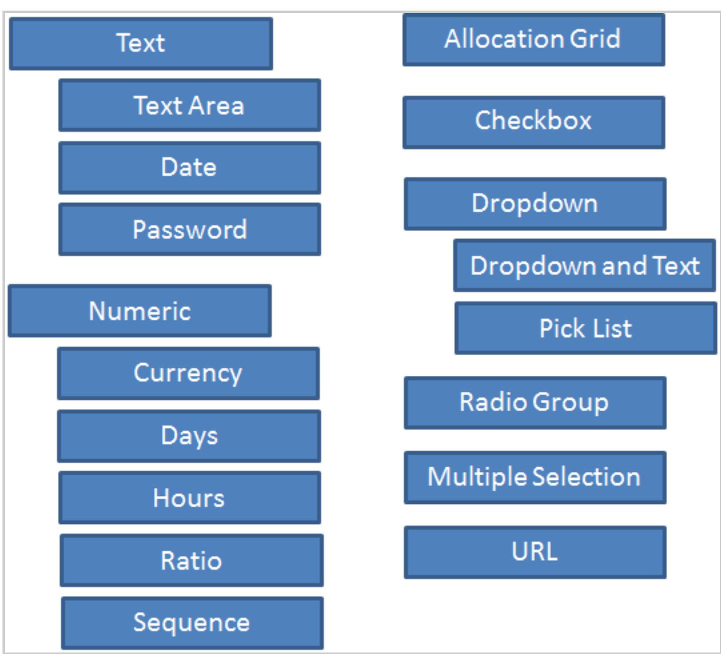
   Tip: The order in the drop-down list shows the current order of custom fields.

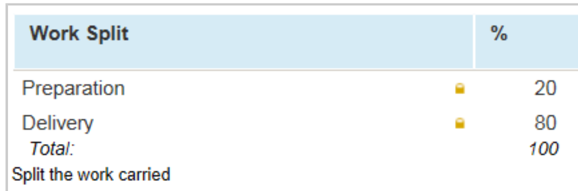
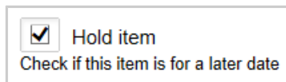
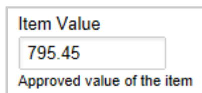
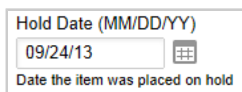
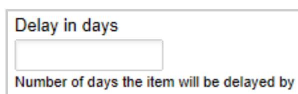
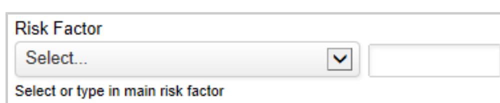
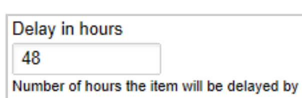
4. Click Save.

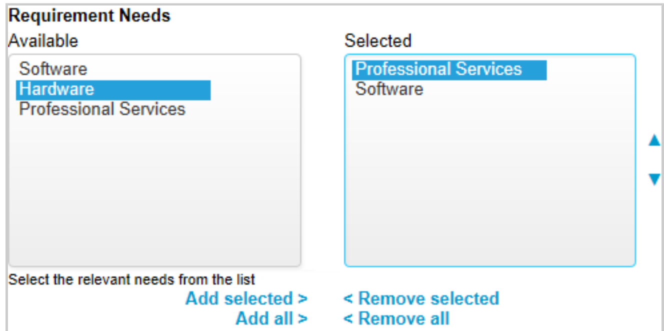
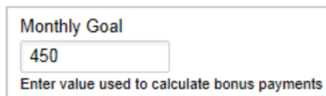
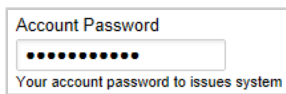
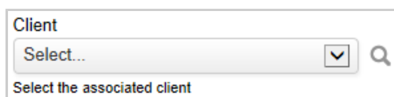
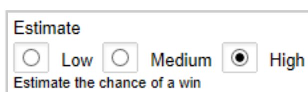
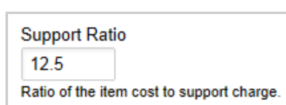
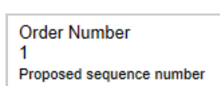
Note: The position of the custom fields in relation to the standard form fields is determined by the Form options.

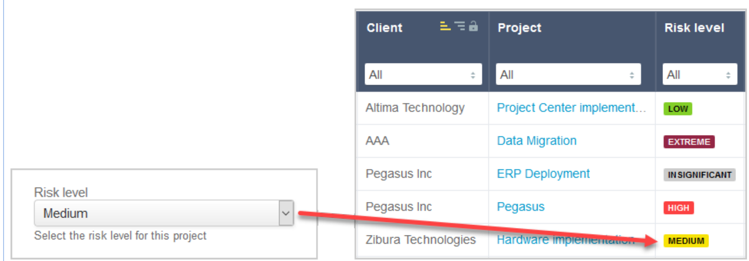
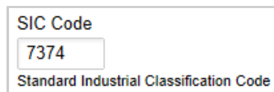
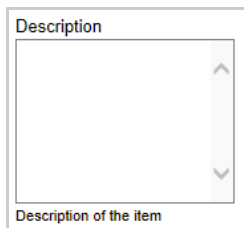
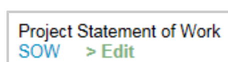
Custom Field Types

The following table illustrates the different types of custom fields you can create. The special setting for each type are listed together with each **Field Type**. See Creating and Modifying Custom Fields for the common custom field settings.



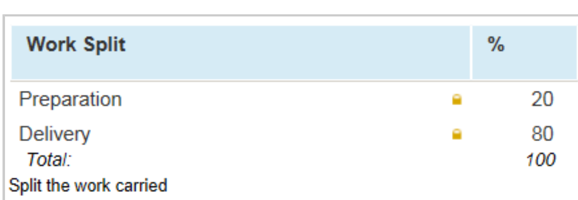
Field Type	Example
Allocation Grid ▪ Allocations must equal 100%	
Checkbox ▪ Checked	
Currency ▪ Field size ▪ Decimal positions ▪ Required	
Date ▪ Default to Current Date ▪ Required ▪ Unique	
Days ▪ Field size ▪ Decimal positions ▪ Required	
Dropdown ▪ Values ▪ Required	
Dropdown and Text ▪ Field size ▪ Max data length ▪ Values ▪ Required	
Hours ▪ Field size ▪ Decimal positions ▪ Required	

Field Type	Example
Multiple Selection ▪ Value list ▪ Required ▪ Allow ordering	
Numeric ▪ Field size ▪ Decimal positions ▪ Required ▪ Unique	
Password	
Pick List ▪ List source	
Radio Group ▪ Value list ▪ Default to first value in list for new entities	
Ratio ▪ Field size ▪ Decimal positions ▪ Required	
Sequence ▪ Next sequence number	

Field Type	Example
Tag ▪ Tags ▪ Required	
Text ▪ Field size ▪ Max data length ▪ Required	
Text Area ▪ Field width ▪ Rows ▪ Required	
URL ▪ URL ▪ Link name ▪ Action	

Allocation Grid

Allocation grids can be helpful in several use cases, but typically only work for small customers because of the amount of maintenance they require and how they work in reporting. The allocation grid custom field allows you to automatically report on a percentage of a number, where the percentage is stored in the allocation grid, and each value/row in the grid becomes its own reporting column.

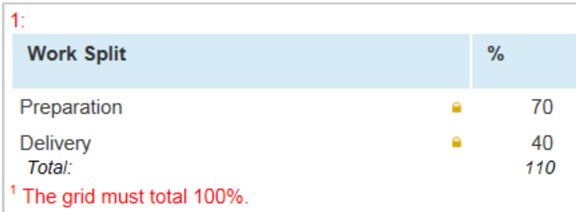


Some of the uses of the allocation grid are for commissions when there is a small sales team and to proportion revenue among departments. For example, you might split revenue 60/40 or 50/50, regardless of users who performed the revenue. The allocation grid has the ability to split transactions across the assigned percentages within summary reports.

Allocation grid custom fields have the following additional properties:

- **Value list** — Enter the allocation names.

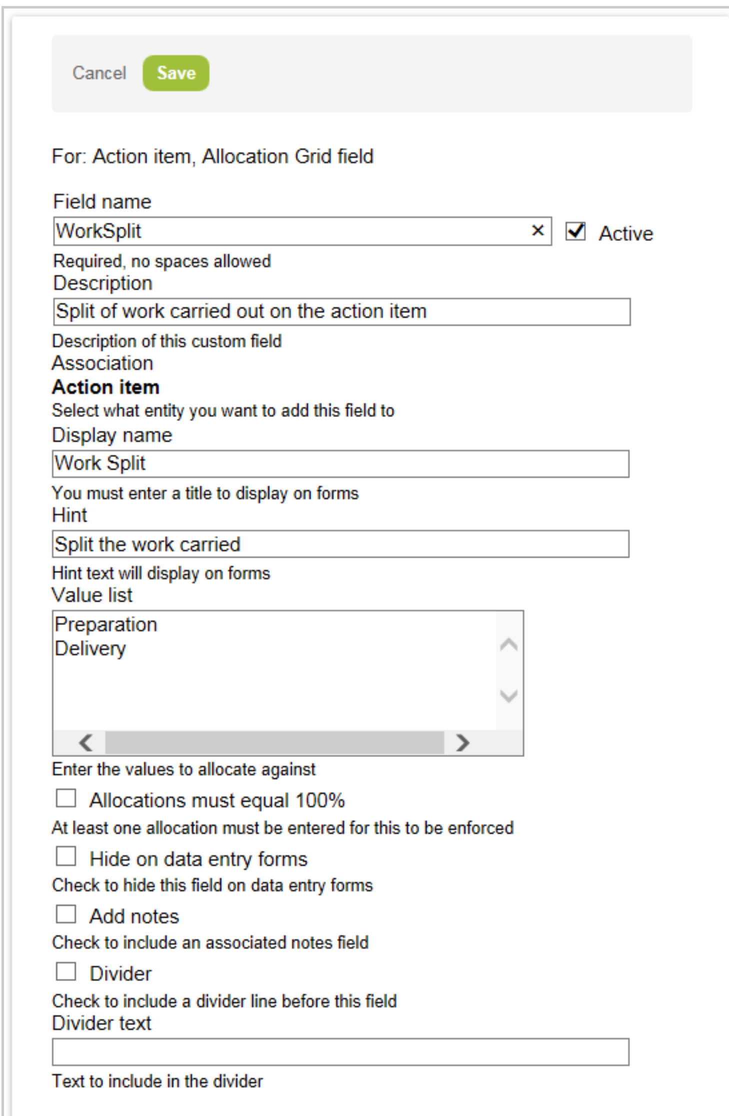
- **Allocations must equal 100%** — When checked, it is not be possible to save the form unless all the total allocation is 100%. You can still save the form if all allocations are set to `0`, that is, when no allocations have been assigned.



> **Note:** To enable the Allocation Grid Custom Field Type optional feature, contact OpenAir Customer Support.

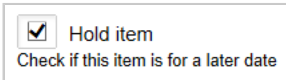
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



Checkbox

With a checkbox custom field, users can only select a value or not select it. This type of field lends itself to a true or false value.



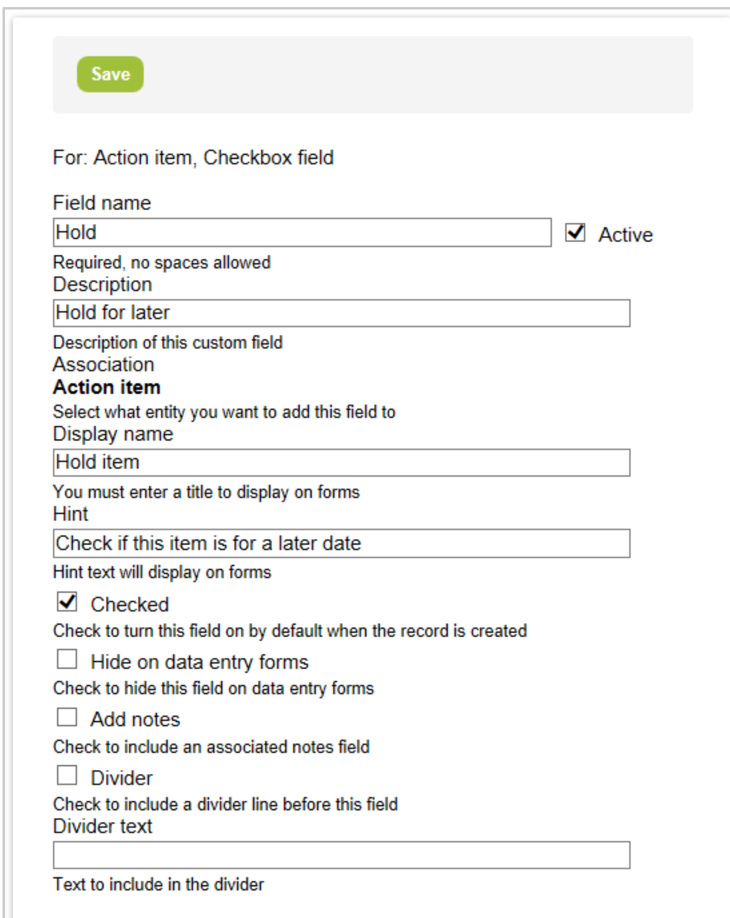
Using checkboxes for data elements allows for flexible reporting. Since the values are defined by being checked or unchecked, the field filters for data reporting.

Checkbox custom fields have the following additional property:

- **Checked** — If you check this box, the Checkbox field will be checked by default when creating a new entity.

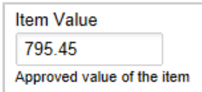
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



Currency

Currency fields are used to store a monetary value. By using currency fields, you can store values that can be reported on later as well as used in custom calculations. For example, you might set a bonus rate on the User Demographic form that could later be used to calculate bonus payments using either calculated fields or by downloading the data to Microsoft Excel.



You need to establish the field size, which is the total field length including the decimal character, and the Decimal positions, indicating the number of digits to the right of the decimal.

Currency custom fields have the following additional properties:

- **Field size** — This is the number of digits you can type including any separator characters. For example, “1,000,000.11” takes a **Field size** of 12.

  > **Note:** Comma separators are stripped, so “1,000,000.11” is displayed as “1000000.11”.

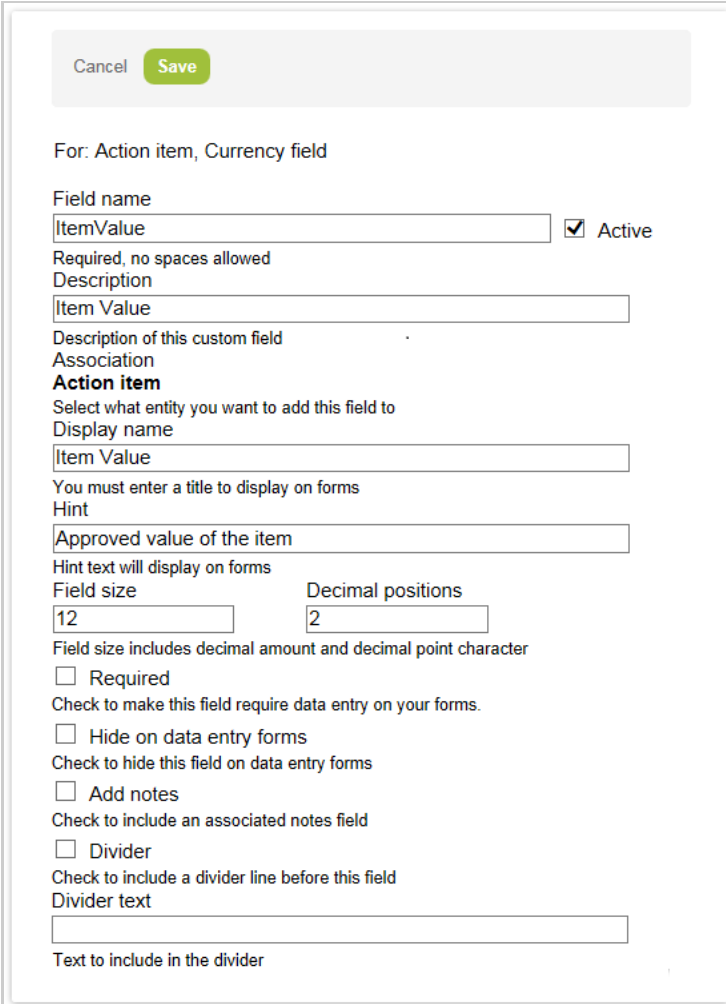
- **Decimal positions** — This is the number of digits that are saved after the decimal point.

  > **Note:** Rounding is applied if you type more digits than specified. For example, if you set **Decimal positions** to 2, then “55.756” will be saved as “55.76”.

- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

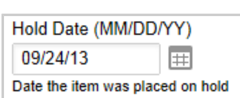
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



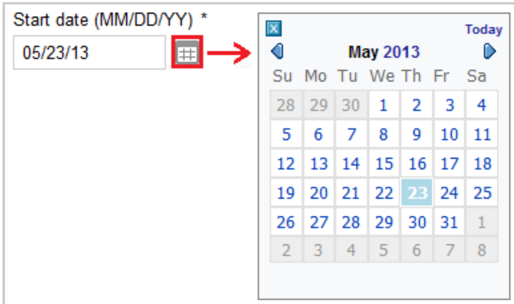
Date

Date fields store a date value. By using date fields, you can store values that can be later reported on. For example, you could set a start date or birthday on the User Demographic form that could later be reported on in Detail Reports. The date format defaults to the format selected in Regional Settings. See Regional Settings.



You can set the date field to default to today's date by checking the **Default to Current Date** box.

Date fields are provided with a Calendar feature to select a date. You can either directly type in a date or use the calendar feature by clicking the icon next to the date field.

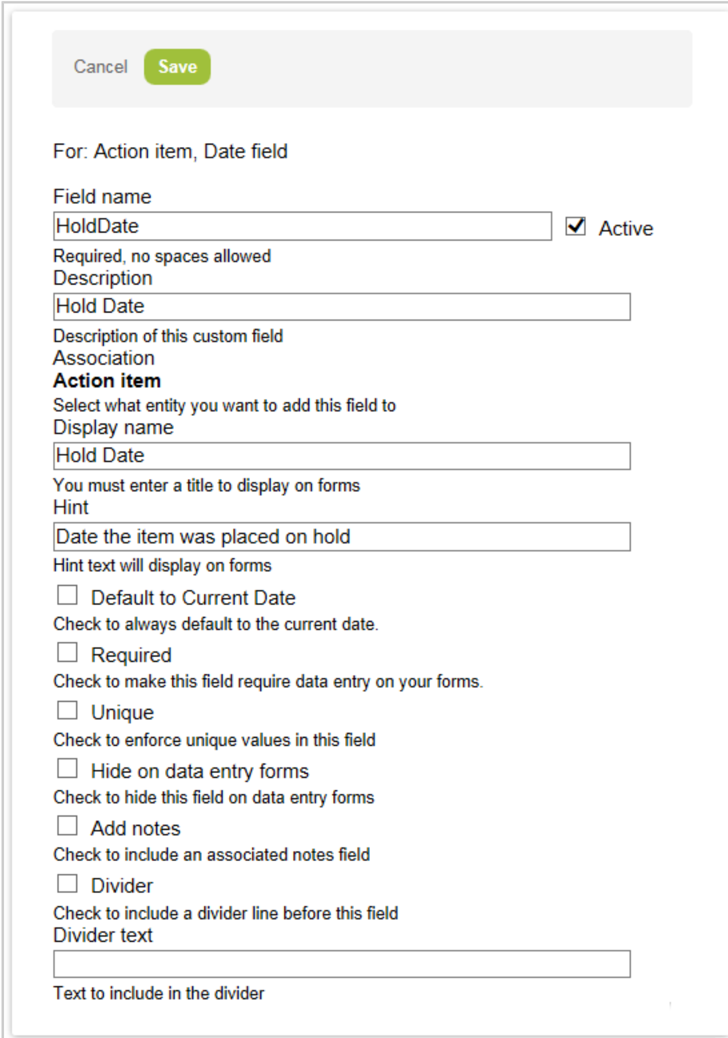


Date custom fields have the following additional properties:

- **Default to the current date** — If you check this box, the custom field will default to today's date when creating a new entity.
- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.
- **Unique** — If you check this box, a unique value must be entered in the field to be able to save the form.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.


Cancel Save

For: Action item, Date field

Field name

HoldDate ☑ Active

Required, no spaces allowed

Description

Hold Date

Description of this custom field

Association

Action item

Select what entity you want to add this field to

Display name

Hold Date

You must enter a title to display on forms

Hint

Date the item was placed on hold

Hint text will display on forms

☐ Default to Current Date

Check to always default to the current date.

☐ Required

Check to make this field require data entry on your forms.

☐ Unique

Check to enforce unique values in this field

☐ Hide on data entry forms

Check to hide this field on data entry forms

☐ Add notes

Check to include an associated notes field

☐ Divider

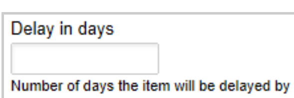
Check to include a divider line before this field

Divider text

Text to include in the divider

Days

Days fields store day values for an entity that can be later reported on. For example, you could set a Days value on a task that could be the standard allotted time for that task.


Delay in days

Number of days the item will be delayed by

Days custom fields have the following additional properties:

- **Field size** — This is the number of digits you can type including any separator characters. For example, "1,000,000.11" takes a **Field size** of 12.

> **Note:** Comma separators are stripped, so "1,000,000.11" is displayed as "1000000.11".

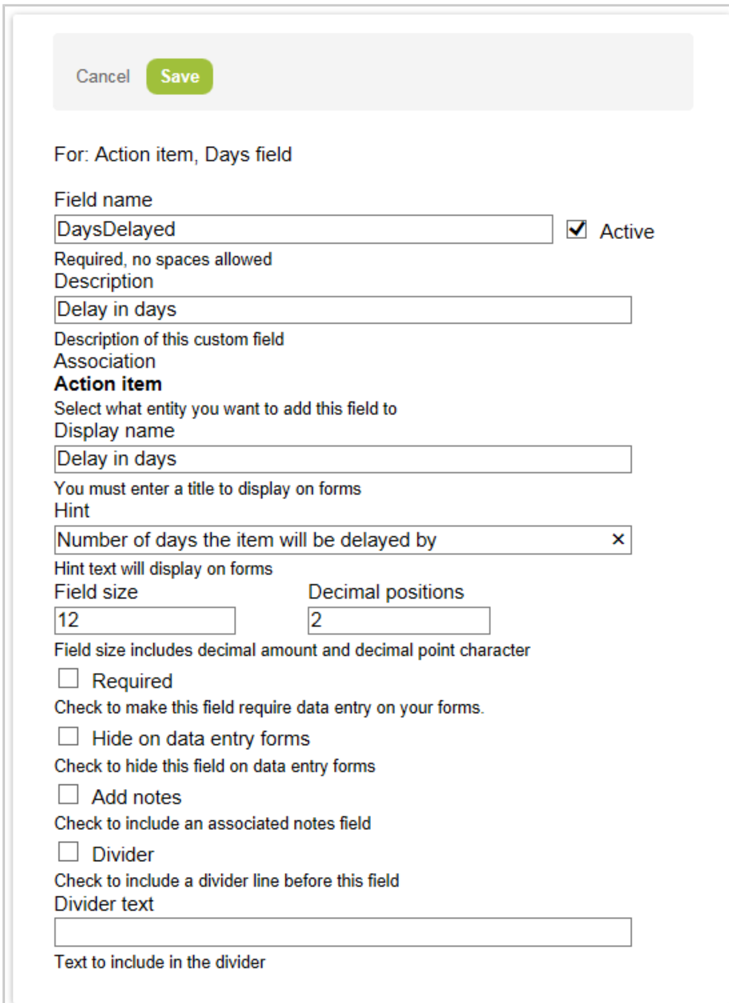
- **Decimal positions** — This is the number of digits that are saved after the decimal point.

> **Note:** Rounding is applied if you type more digits than specified. For example, if you set **Decimal positions** to 2, then "55.756" will be saved as "55.76".

- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

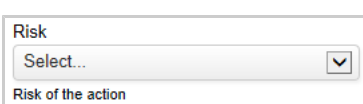
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



Dropdown

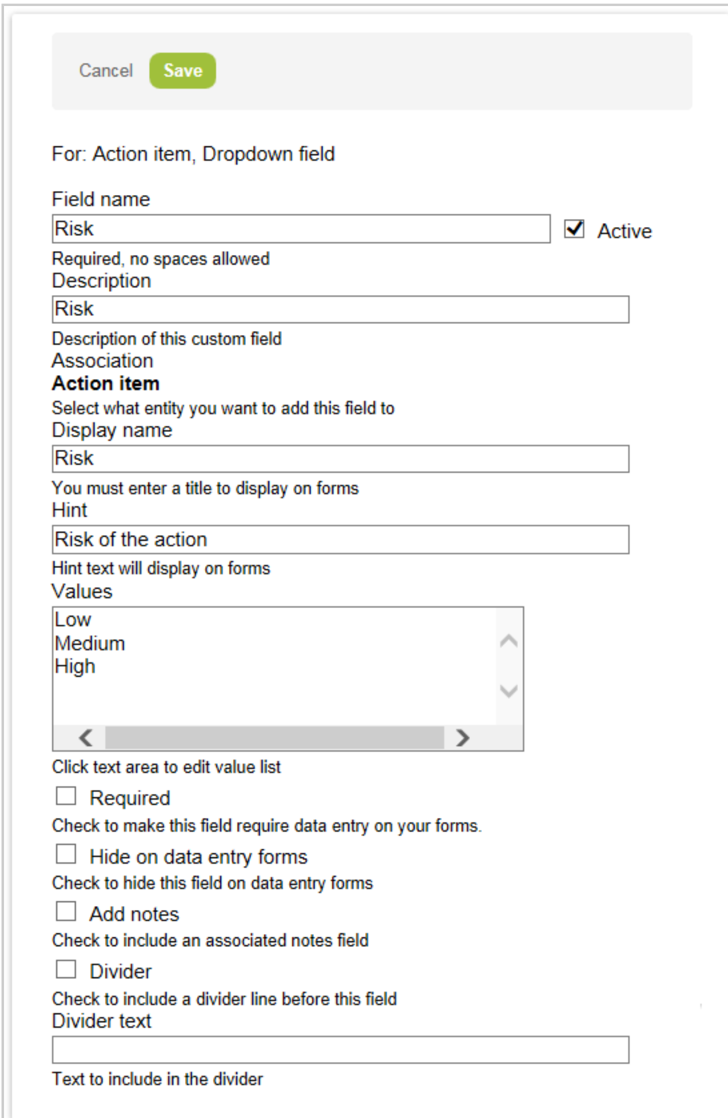
Dropdown fields allow users to select a value from a predefined list of values. Only one value can be selected per Dropdown field. These selected values can be reported on. For example, you may create a list of sales reps for projects to create reports for commission purposes. Custom Dropdown fields can be used in both Summary and Detailed Reports. In Summary Reports, the Dropdown fields can be subtotaled and filtered to limit data in the report. In addition to limiting value selections, this is a primary advantage of using a Dropdown field instead of a text field.



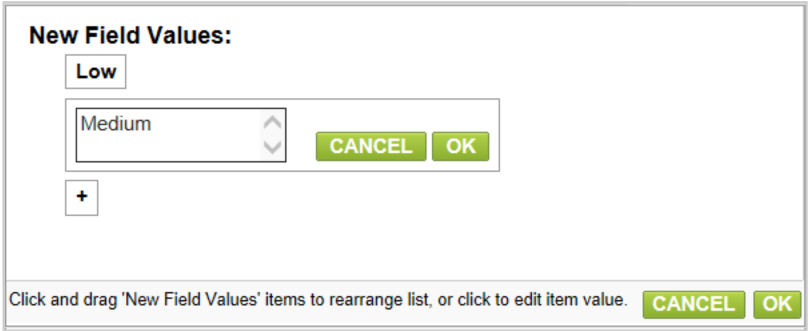
Important: Dropdown field values are stored as text in the database. You should not edit or remove existing values from a Dropdown field that have been in use unless you are aware they may require some database cleanup afterward.

Dropdown custom fields have the following additional properties:

- **Values** — Enter the values to appear in the drop-down list.
- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.



If the Conditional Dropdown Custom Fields optional feature is enabled for your account, use the following steps:



To add Values:

1. Click the **Values** text area to display the **New Field Values** popup.
2. Click the + button to add a new value.
3. Type in the value and click OK next to your new value.
4. Repeat above steps to add all the required values.
5. Click OK at the bottom right of the popup to save the values.

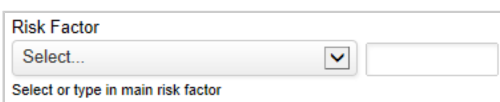
To enable the Conditional Dropdown Custom Fields optional feature, contact OpenAir Customer Support.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Dropdown and Text

Dropdown with Text fields allow users to select a value from a predefined list of values or add a text value. Only one value can be selected per Dropdown with Text field. In other words, you cannot pick from the list of values and add text. You may do one or the other. For example, you can create a list of partners for projects and users may select one. Users could also enter a new partner if the value does not display in the list of values.



The selected values can be reported on in both Summary and Detailed Reports. In Summary Reports, Dropdown with Text fields can be subtotaled and filtered.

Note: The filter in Summary Reports only includes values from the defined Value list. The text users enter cannot be filtered.

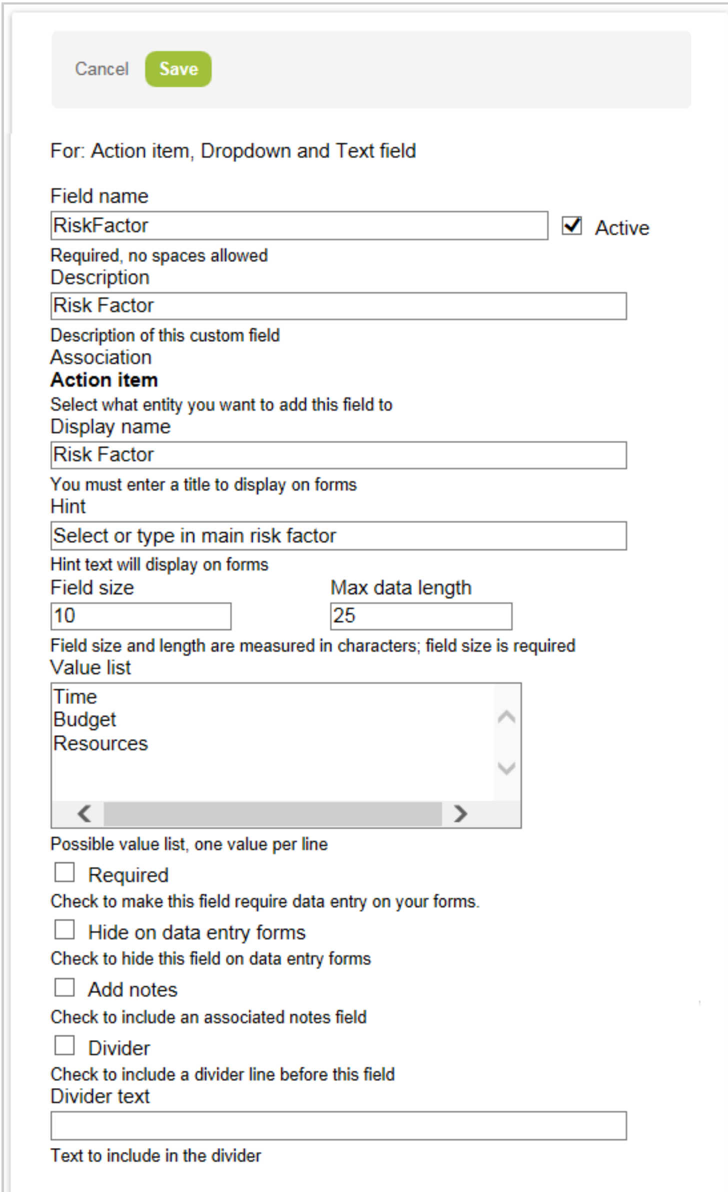
Important: Dropdown field values are stored as text in the database. You should not edit or remove existing values from a Dropdown field that have been in use unless you are aware they may require some database cleanup afterward.

Dropdown and text custom fields have the following additional properties:

- **Field size** — This controls the visible size of the text field displayed next to the drop-down list. The value is the number of characters visible to the user at one time.
- **Max data length** — This is the maximum number of characters a user can type into the text field.
- **Value list** — Enter the values to appear in the dropdown list. Use only one value per line.
- **Required** — If checked the field is required on the form and the form cannot be saved without supplying a value.

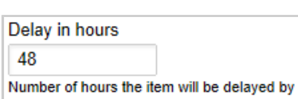
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



Hours

Hours fields store hour values for an entity that can be later reported on. For example, you could set an Hours value on a task that could be the standard allotted time for that task.



Hours custom fields have the following additional properties:

- **Field size** — This is the number of digits you can type including any separator characters. For example, “1,000,000.11” takes a **Field size** of 12.

> **Note:** Comma separators are stripped, so “1,000,000.11” is displayed as “1000000.11”.

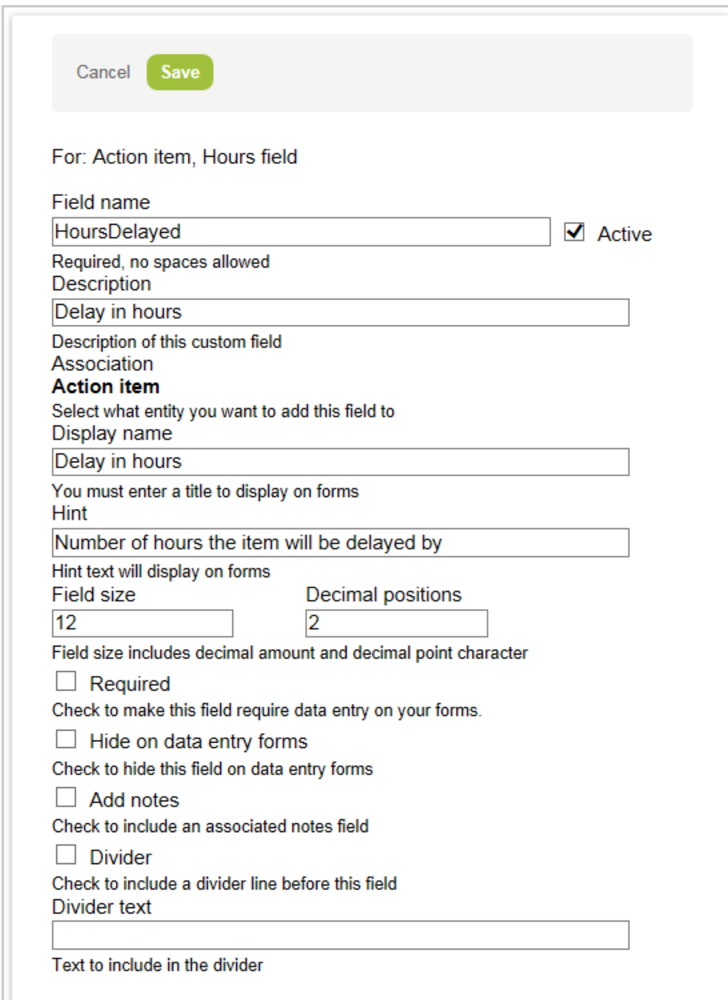
- **Decimal positions** — This is the number of digits that are saved after the decimal point.

> **Note:** Rounding is applied if you type more digits than specified. For example, if you set **Decimal positions** to 2, then “55.756” will be saved as “55.76”.

- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

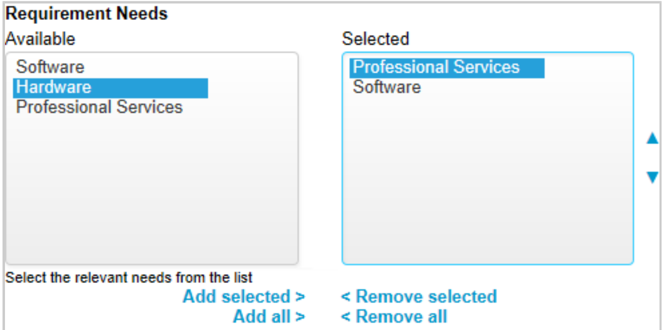
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



Multiple Selection

Multiple Selection fields allow users to select multiple values from a predefined list. Users may choose one value, multiple values, or all values.



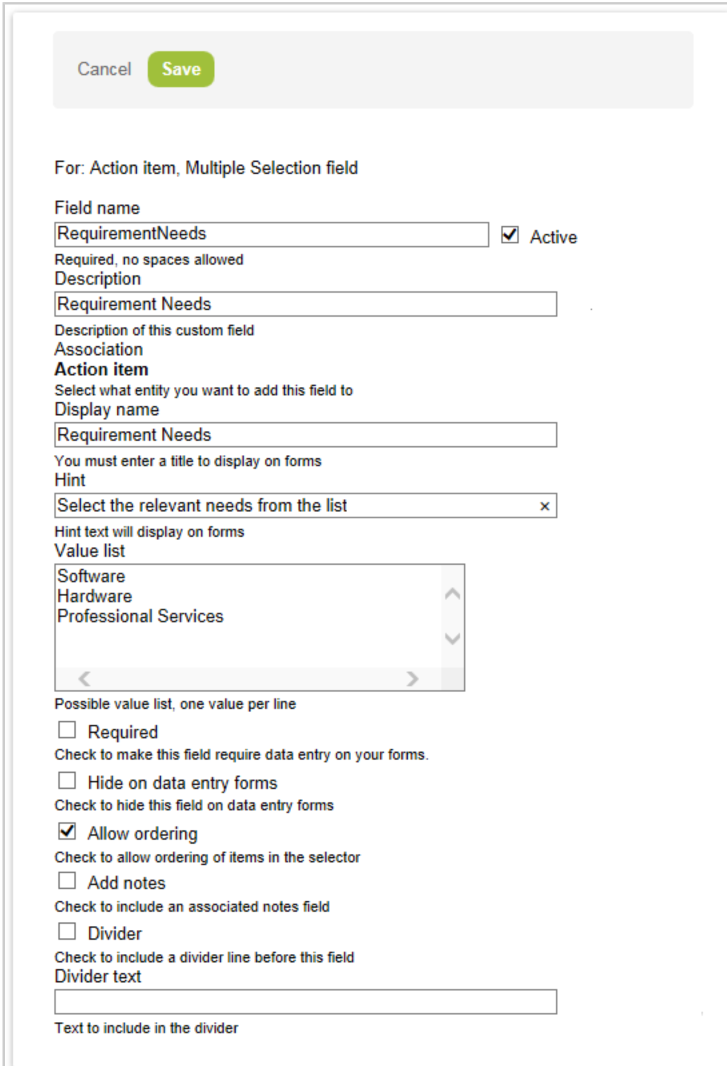
Selected values can be then reported on. For example, you can create a list of project influences for projects that can be reported on for bonus purposes. Multiple Selection fields can be used in both Summary and Detailed Reports. However , you cannot summarize or filter data with Multiple Selection fields. You can only report on data.

Multiple selection custom fields have the following additional properties:

- **Value list** — Enter the values to appear in the selection list. Use only one value per line.
- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.
- **Allow ordering** — If checked, up and down buttons will appear next to the **Selected** list.

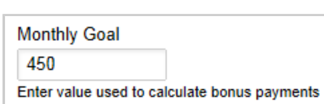
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



Numeric

Numeric fields are used to store a numerical value. By using Numeric fields, you can store values that can be reported on as well as used in Custom Calculations. For example, you could set a Monthly Goal on the User Demographic form that could later be used to calculate bonus payments using either calculated fields or by downloading the data to Microsoft Excel.



Numeric custom fields have the following additional properties:

- **Field size** — This is the number of digits you can type including any separator characters. For example, “1,000,000.11” takes a **Field size** of 12.

  Note: Comma separators are stripped, so “1,000,000.11” is displayed as “1000000.11”.

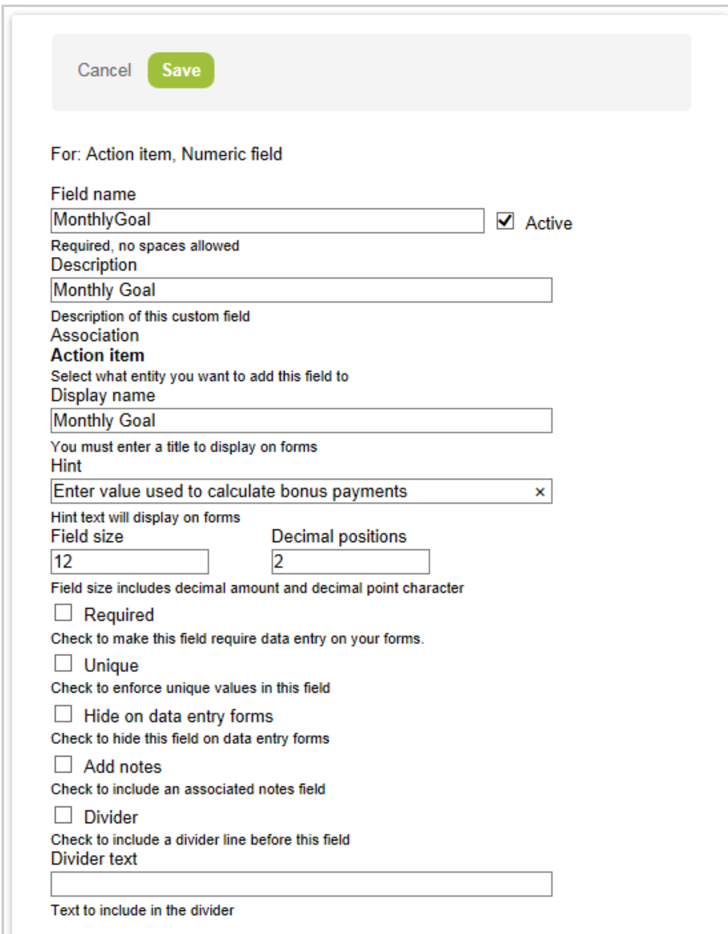
- **Decimal positions** — This is the number of digits that are saved after the decimal point.

> **Note:** Rounding is applied if you type more digits than specified. For example, if you set **Decimal positions** to 2, then "55.756" will be saved as "55.76".

- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.
- **Unique** — If you check this box, a unique value must be entered in the field to be able to save the form.

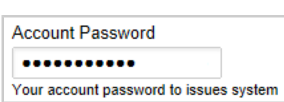
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



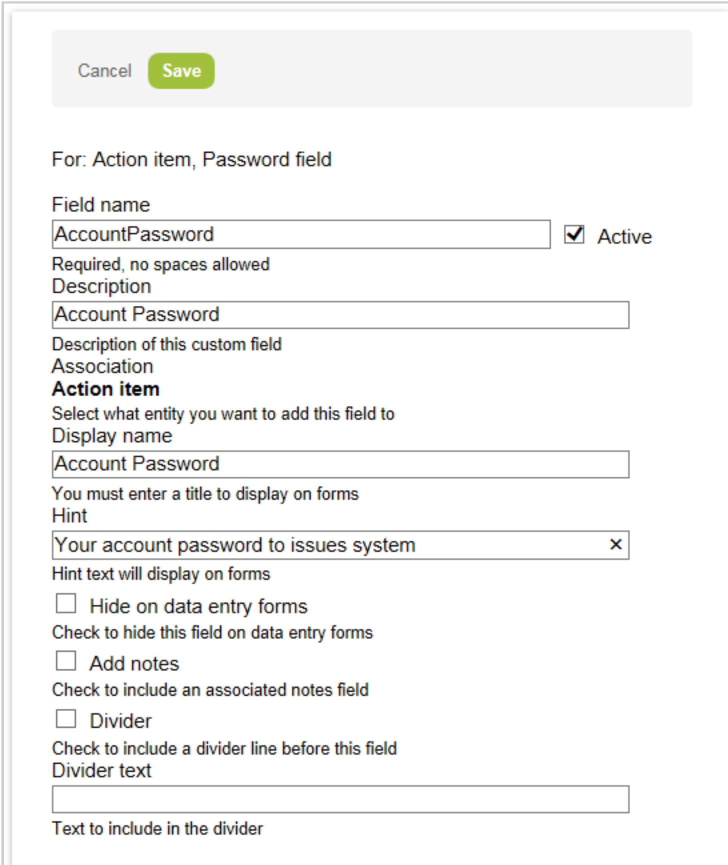
Password

Password fields are similar to text fields, but they have a maximum length of 30 characters and mask the values displayed as they are typed. Passwords are stored in the database in encrypted form. You can paste text into a Password field, but your cannot copy or cut text from a Password field. Password custom fields are useful for integrations with other systems that require a stored password.



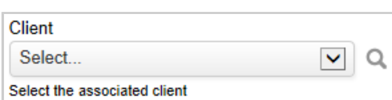
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

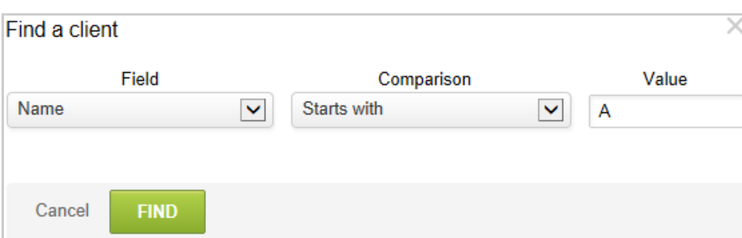


Pick List

A pick list is a dropdown list where values are sourced from the list of OpenAir records of a specific type, identified by the Name field



The search icon is displayed next to the Pick List if you select a **List Source** with a large list of options. Click the search icon to use the advanced search feature.



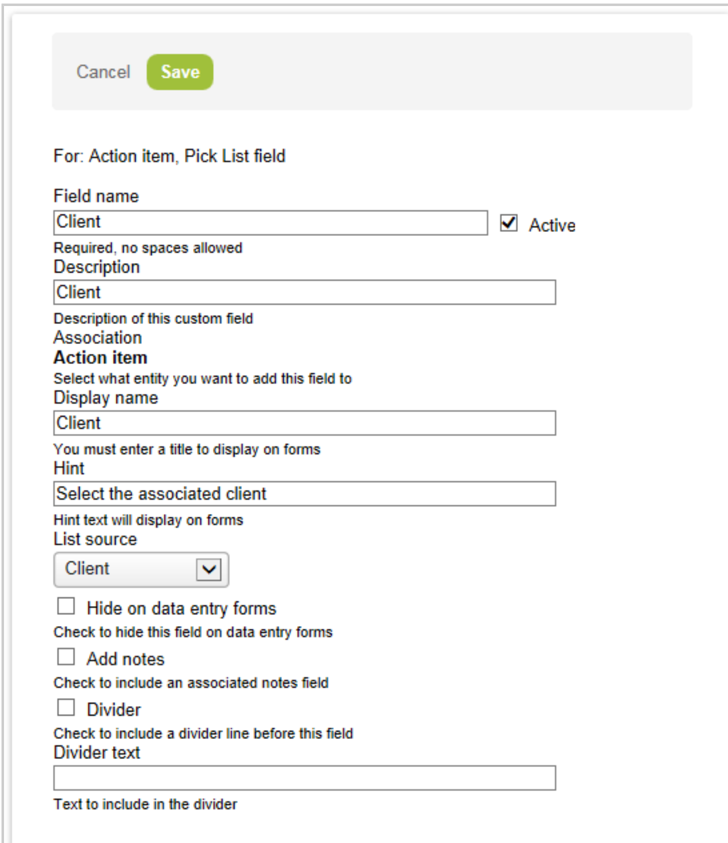
Pick list custom fields have the following additional property:

- **List source** — Select a record type. The pick list options are sourced from the list of records of this type.

> **Note:** To enable the Pick List Custom Field Type optional feature, contact OpenAir Customer Support.

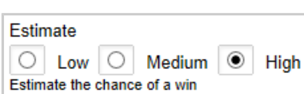
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



Radio Group

Radio Groups allow a user to choose one selection out of two or more choices. This type of field is functionally similar to a Dropdown custom field, whereas only one value may be chosen by the user.



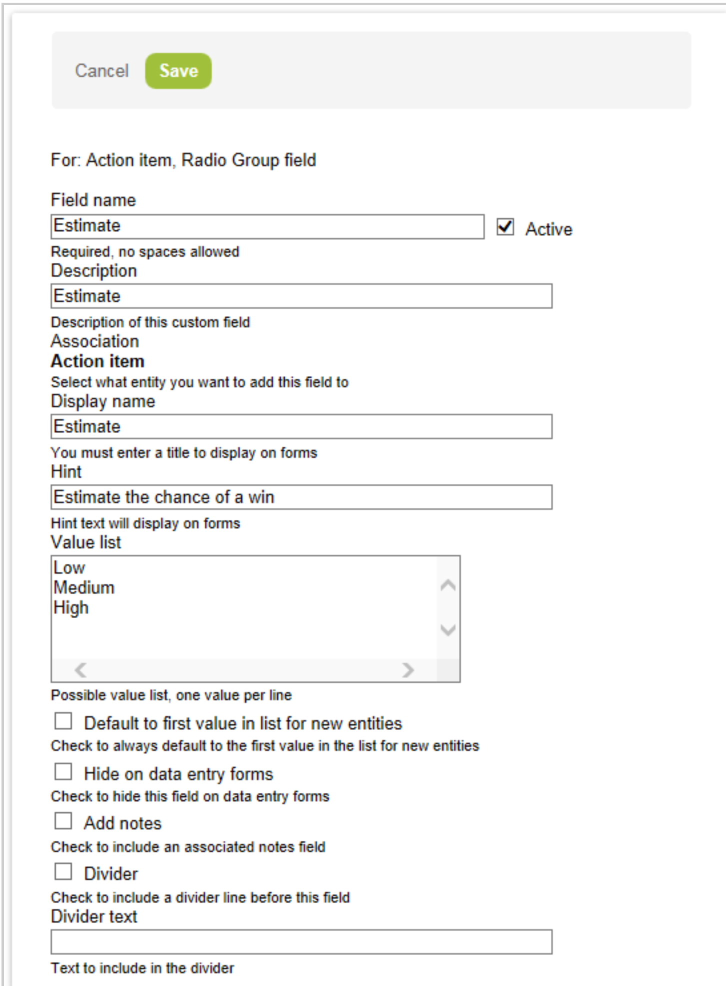
Radio group custom fields have the following additional properties:

The selected values can be then reported on in both Summary and Detailed Reports. For example, you can create a list of account managers for projects to be reported on for commission purposes. In Summary Reports, Radio Group custom fields can be subtotaled and be filtered to limit data in the report.

- **Value list** — Enter the names to use for the radio buttons. Use only one value per line.
- **Default to first value in list for new entities** — If you check this box, the first radio button will be selected by default when creating a new entity.

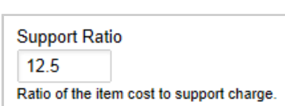
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



Ratio

Ratio fields can be modified as needed by accessing the entity form and changing the value. Ratio fields are useful if you need a custom field included in a calculated field because they can be multiplied or divided against all other types of number fields such as numeric, currency, and hours, to name a few.



Ratio custom fields have the following additional properties:

- **Field size** — This is the number of digits you can type including any separator characters. For example, “1,000,000.11” takes a **Field size** of 12.

  > **Note:** Comma separators are stripped, so “1,000,000.11” is displayed as “1000000.11”.

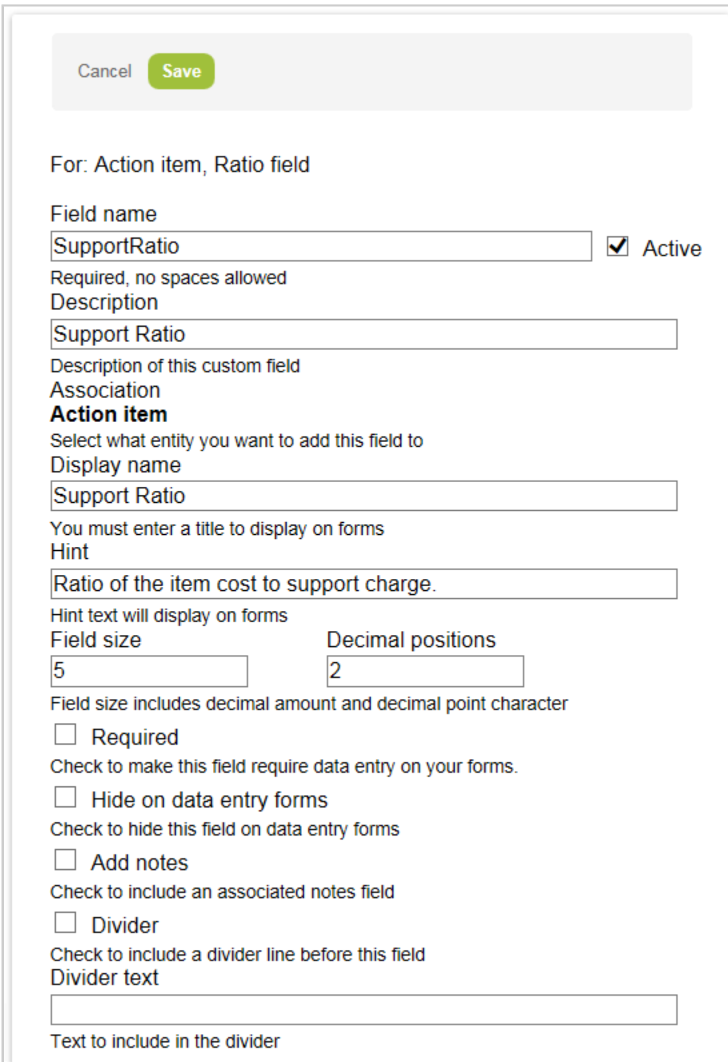
- **Decimal positions** — This is the number of digits that are saved after the decimal point.

Note: Rounding is applied if you type more digits than specified. For example, if you set **Decimal positions** to 2, then "55.756" will be saved as "55.76".

- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

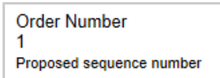
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



Sequence

Sequence Group fields assign a unique number to each associated entity. However, please note that custom field sequence numbers are NOT modifiable. The sequencing continues even if a record gets deleted. For example, if a Sequence custom field is associated with projects, and if there is a 100, 101, 102, and 104, chances are that project 103 was deleted. Sequence Group fields are applied by going to the associated entity, one-by-one in the desired order, and then saving the entity's form.



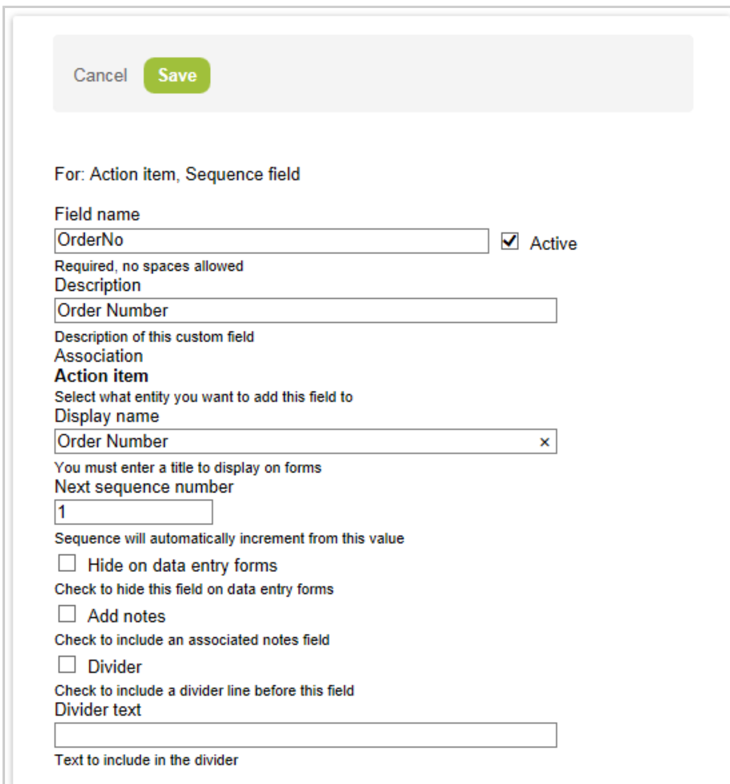
Sequence Group fields can be used for both Summary and Detailed Reports. However, you cannot summarize or filter data, but only add reporting details. For example, you could set a Project Number that could later be used in Detail Reports.

Sequence custom fields have the following additional property:

- **Next sequence number** — Enter the starting value for the sequence number.

See Creating and Modifying Custom Fields for more details.

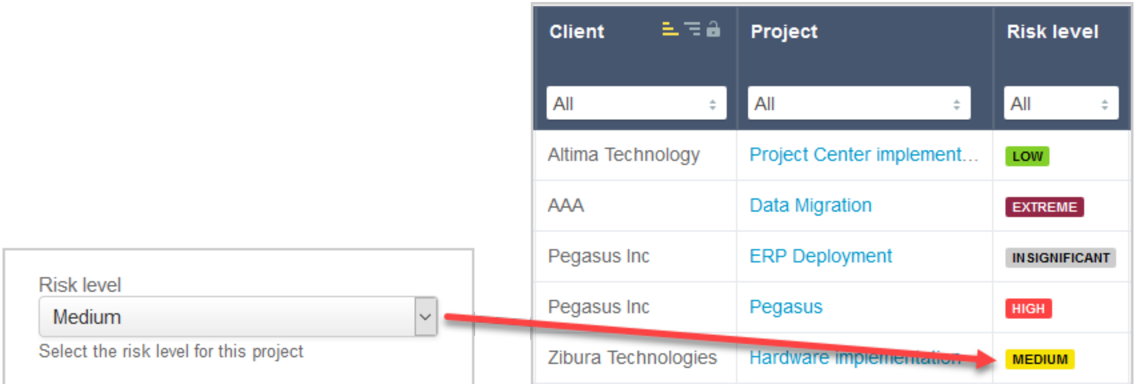
For the full list of types, see Custom Field Types.



Tag

Add a tag to your entity properties forms and display it on your list views, project status summaries, reports and dashboard portlets.

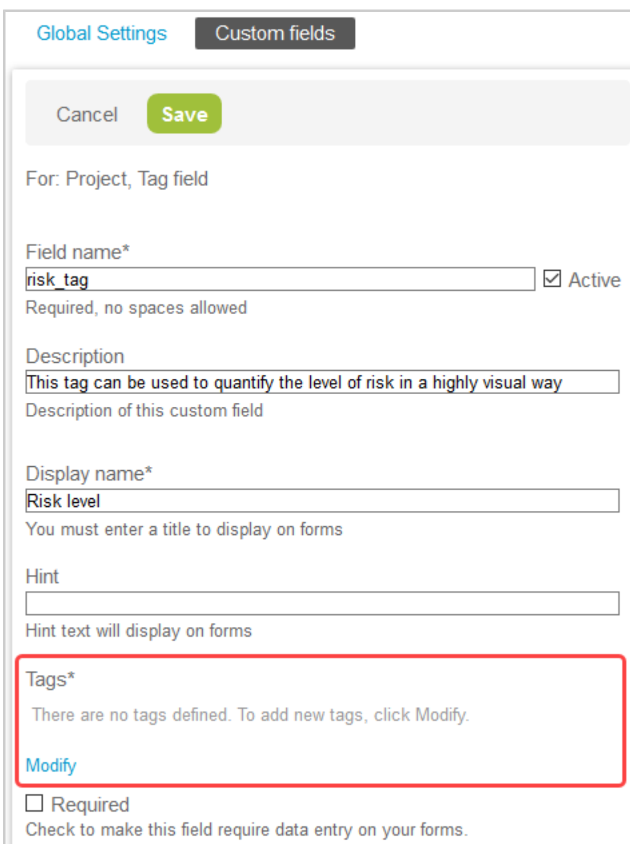
The tag custom field lets you select a single tag. It uses the same mechanism as dropdown custom fields but tag custom field values are displayed as badges with specified text and color.



- You can use tag custom fields to draw attention to important information on forms, list views, and reports. For example, you can use this custom field type to define a risk tags for any entity.
- You can control who can see or update tag values using form permissions and form rules.
- You can use the OpenAir Integration Manager, XML API, SOAP API and user scripting to read, set and modify tag custom fields.

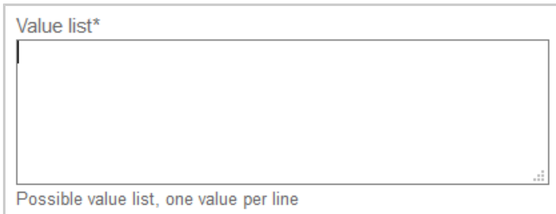
To create or modify a tag custom field and tag value options:

1. Follow the usual procedure for creating or modifying custom fields.
   - If the Conditional Dropdown Custom Fields optional feature is enabled for your OpenAir account, the custom field properties form includes a required **Tags** field.



> **Note:** You should enable the Conditional Dropdown Custom Fields optional feature.
>
> To enable the Conditional Dropdown Custom Fields feature for your account, contact OpenAir Customer Support.

- Otherwise, the custom fields properties form includes a required **Value list** field.



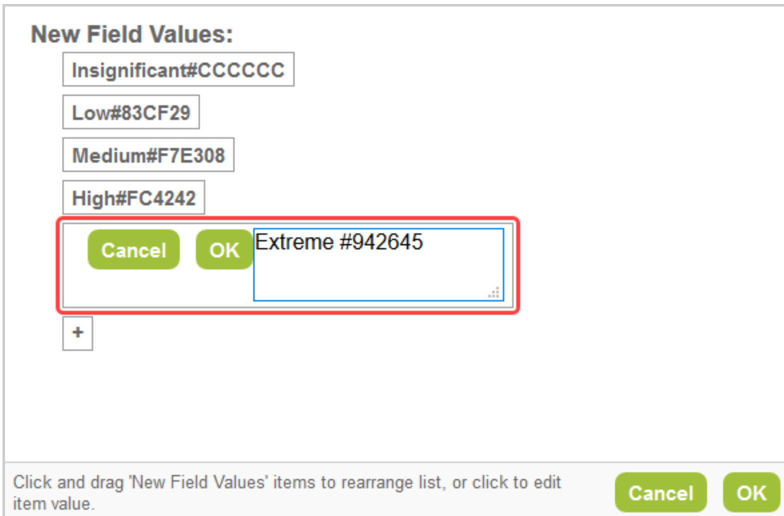
2. On the custom field properties form, define Tag values.

> **Note:** The following steps assume the optional feature Conditional Dropdown Custom Fields is enabled for your OpenAir account.
>
> If the Conditional Dropdown Custom Fields is not enabled for your OpenAir account, list tag value definitions in the required order, one value per line, in the **Value list** text box using the format <Text><Hex_Color_code>— for example, Medium#F7E308.

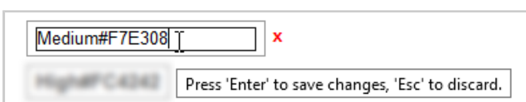
   a. Click **Modify** under **Tags**. A popup appears and shows the custom field display name for existing fields, or “ New Field Values” if you are creating a new custom field.

   b. To add a new tag value, click the Add button, and type the tag value definition in the text box. Click **OK**. The tag value is added.

> **Note:** You can define the text and badge color for tag values. The tag value definition includes the display text and the background color for the tag value in the following format: `<Text> <Hex_Color_code>`
>
> - `<Text>` — The display text . It must be unique for each tag value.
> - `<Text> <Hex_Color_code>` — The background color defined as a Hex color code (for example, `#2C7ADB`).
>
> The tag value display text is set automatically to white or black, depending on the background color.



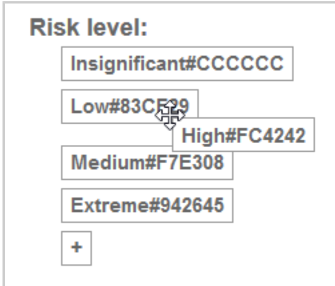
c. To modify a tag value, click the tag value, and edit the tag value definition in the text box. Press Enter to save your changes or Esc to discard your changes. The tag value shows the new definition.



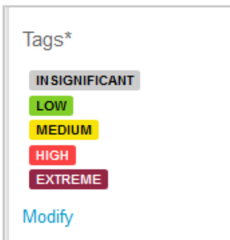
d. To delete a tag value, click the tag value, and click the Delete icon x . The tag value is removed.

> **Note:** You can remove a tag value even if the taq custom field is set to this value on some records. Records continue to show the selected tag value after that tag value is removed.

e. To change the order of tag values in the dropdown, drag tag values to the position required.



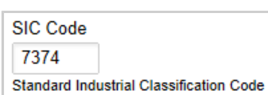
f. Click **OK** to save the tag value changes. The custom field properties form shows the tag values you added or modified.



3. Follow the usual procedure for creating or modifying custom fields.
4. Click **Save** to save the custom field properties.

Text

Text fields store text values up to a maximum of 250 characters. Text fields can be used for both Summary and Detail Reports. However they cannot be used to summarize or filter data, only to add reporting details. For example, you could set a SIC Code on the customer that could later be used in Detail Reports.

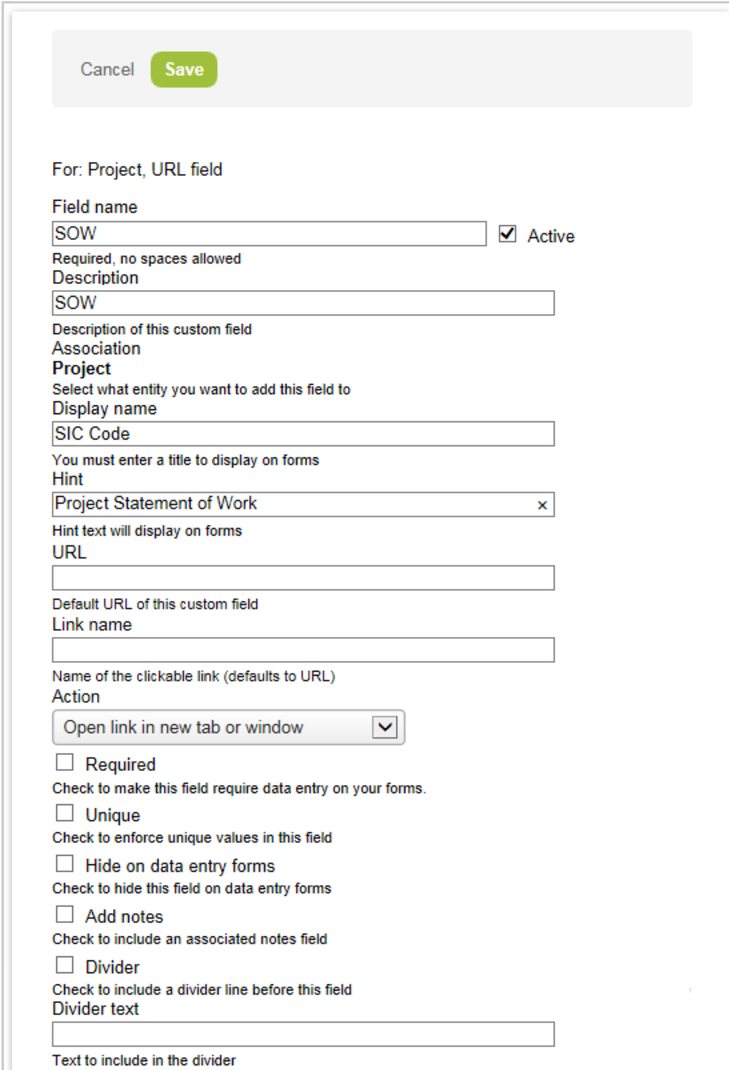


Text custom fields have the following additional properties:

- **Field size** — This controls the visible size of the text field displayed next to the drop-down list. The value is the number of characters visible to the user at one time.
- **Max data length** — This is the maximum number of characters a user can type into the text field.
- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.
- **Unique** — If you check this box, a unique value must be entered in the field to be able to save the form.

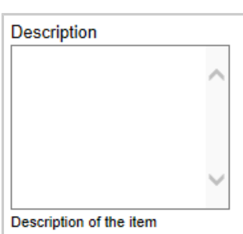
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



Text Area

Text Area fields store lengthy text values. Text fields can be used for both Summary and Detail Reports. However, you cannot summarize or filter data. You can only add reporting details. For example, you could set a Special terms field on the customer that could later be used in Detail Reports.



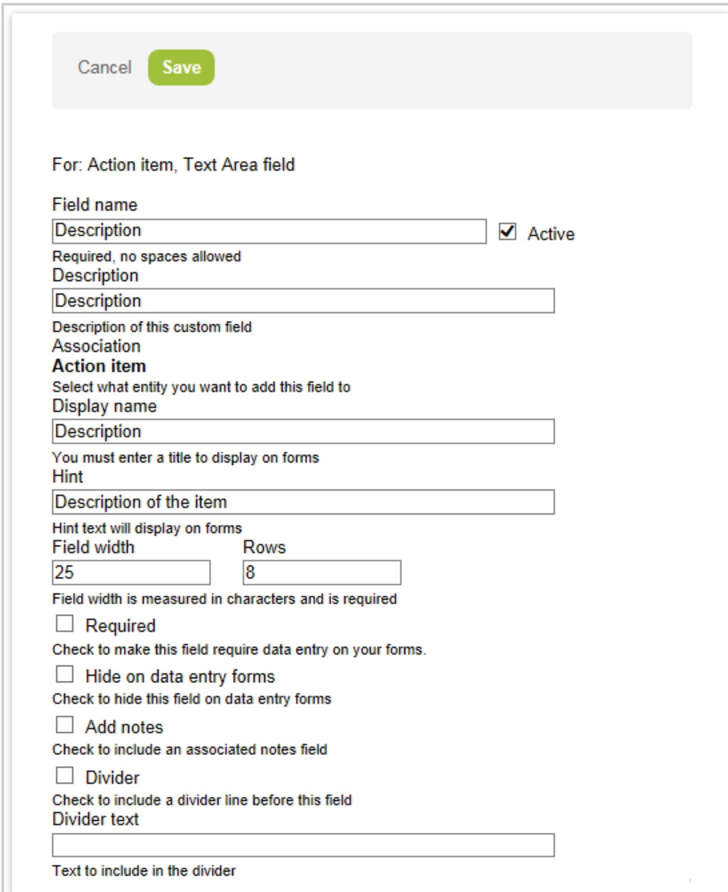
Text area custom fields have the following additional properties:

- **Field width** — This controls the width of the text area . The value is the number of characters visible to the user at one time.

- **Rows** — This controls the height of the text area . The value is the number of rows of text visible to the user at one time.
- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

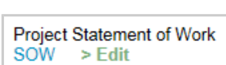
See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



URL

URL fields are used to define clickable hyperlinks that enrich OpenAir forms with links to both internal OpenAir documents and external resources available on a customer's intranet or the internet as required. For example, a user can create a link from a project to its Statement of Work document stored in an OpenAir workspace by specifying the Direct URL.



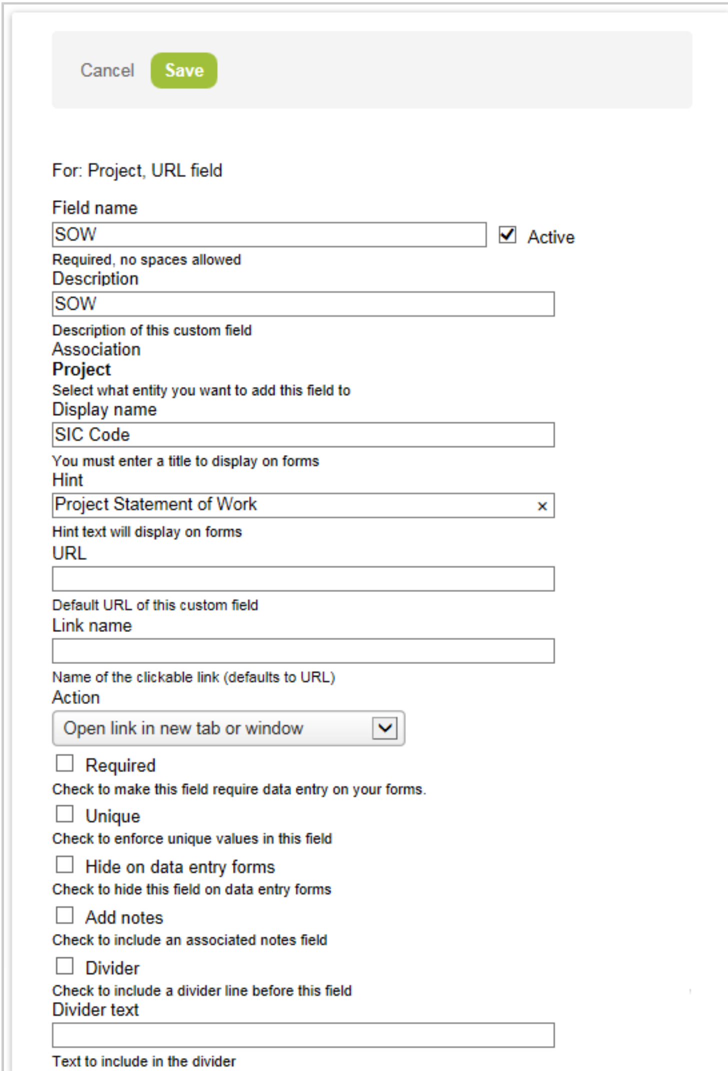
URL custom fields have the following additional properties:

- **URL** — This is the default URL to use. The user can change this if they have access to edit the custom field.
- **Link name** — This is the default text to display that when clicked opens the URL specified. The user can change this if they have access to edit the custom field.

- **Action** — This determines how the URL is opened when the link name is clicked.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.



Record Types and Forms Supporting Custom Fields

Record Types and Forms Supporting Custom Fields The following table lists the record types and forms for which you can add custom fields. These custom fields are also available in the relevant list views. The table also includes the name of the corresponding OpenAir API objects and database table

Note: Your company's OpenAir account may use custom terminology. The following record type names and form navigation paths may be different in your company's account.

Record type	Form navigation path	API object	Database table
Expenses — Authorization	Expenses > Authorizations > [*Select an expense authorization*] > Properties	—	`authorization`

Record type	Form navigation path	API object	Database table
Expenses — Authorization expense item	Expenses > Authorizations > [*Select an expense authorization*] > Future expenses (grid columns)	—	`authorization_item`
Global — Charge	Invoices > Charges > [*Select a charge*]	`Slip`	`slip`
Global — Contact	Administration > Global Settings > Customers > Contacts > [*Select a contact*]	`Contact`	`contact`
Global — Cost center	Administration > Global Settings > Jobs, Rates > Cost Centers > [*Select a cost center*]	`Costcenter`	`cost_center`
Global — Customer	Administration > Global Settings > Customers > Customers > [*Select a customer*] > Demographic	`Customer`	`customer`
Global — Department	Administration > Global Settings > Organization > Departments > [*Select a department*]	`Department`	`department`
Global — Employee	Administration > Global Settings > Users > Employees > [*Select an employee*] > Demographic	`User`	`user`
Global — Expense item	Administration > Global Settings > Application Settings > Invoices Settings > Expense items > [*Select an expense item*]	`Item`	`item`
Global — Expense report	Expenses > Expense reports > [*Select an expense report*] > Properties	`Envelope`	`envelope`
Global — Invoice	Invoices > Invoices > [*Select an invoice*] > Properties	`Invoice`	`invoice`
Global — Issue	Projects > [*Select a project*] > Issues > [*Select an issue*]	`Issue`	`issue`
Global — Hierarchy	Administration > Global Settings > Organization > Hierarchies > [*Select a hierarchy*] **Note:** Requires OpenAir NetSuite Connector workflow settings to map NetSuite hierarchies to OpenAir hierarchies.	`Hierarchy`	`hierarchy`
Global — Hierarchy node	Administration > Global Settings > Organization > Hierarchies > [*Select a hierarchy*] > Levels | Nodes | Records > [*Select a level | node | record*] **Note:** Requires OpenAir NetSuite Connector workflow settings to map NetSuite hierarchies to OpenAir hierarchies.	`HierarchyNode`	`hierarchy_node`
Global — Job code	Administration > Global Settings > Jobs, Rates > Job codes > [*Select a job code*]	`Jobcode`	`job_code`
Global — Payment	Invoices > Invoices > [*Select an invoice*] > Payments	`Payment`	`payment`

Record type	Form navigation path	API object	Database table
Global — Loaded cost	— **Note:** The Loaded Cost Custom Import optional features enables you to create a custom import workflows in OpenAir NetSuite Connector to import information from a NetSuite custom record type into OpenAir as loaded cost [`loaded_cost`] records. It is not possible to create custom fields for loaded cost records in OpenAir. Enabling the feature creates the `netsuite_loaded_cost_id` custom field, The custom field is not visible in the OpenAir UI but you can use OpenAir Integration Manager or OpenAir API to read or set values for this custom field.	`LoadedCost`	`loaded_cost`
Global — Payment terms	Administration > Application Settings > Invoices > Payment terms	`Paymentterms`	`payment_tems`
Global — Payment type	Administration > Application Settings > Expenses > Payment types	`Paymenttype`	`payment_type`
Global — Project	Projects > Projects > [*Select a project*] > Properties	`Project`	`project`
Global — Receipt	Expenses > Expense reports > [*Select an expense report*] > Receipts > [*Select a receipt*]	`Ticket`	`ticket`
Global — Reimbursement	Expenses > Expense reports > [*Select an expense report*] > Reimbursements (grid columns)	`Reimbursement`	`reimbursement`
Global — Service	Administration > Application Settings > Invoices > Services > [*Select a service*]	`Category`	`category`
Global — Service <N> line	Administration > Application Settings > Projects > Service <N> lines > [*Select a service <N> line*]	`Category_<N>`	`category_<N>` (`category_1`)
Global — Tax location	Administration > Global Settings > Organization > Tax Locations > [*Select a tax location*]	`TaxLocation`	`tax_location`
Global — Uprate (API only)	*API only*	`Uprate`	`up_rate`

Record type	Form navigation path	API object	Database table
	Note: Select Uprate (API only) from the **Add custom field to** dropdown to create custom fields associated with project employee combination rate records used for project employee billing and project billing. The Uprate (API only) entity appears under Global in the dropdown. The custom field will be available through the OpenAir XML API and SOAP API only. It will not be available on any form or list view in OpenAir.		
Global — Vendor	Administration > Application Settings > Expenses > Vendors > [*Select a vendor*]	`Vendor`	`vendor`
Invoice — Agreement	Administration > Application Settings > Invoices > Agreements > > [*Select an agreement*]	`Agreement`	`agreement`
Invoice — Customer PO	Administration > Application Settings > Invoices > Customer POs > [*Select a customer PO*]	`Customerpo`	`customerpo`
Invoice — Revenue container	Invoices > Revenue Containers > [*Select a revenue container*]	`RevenueContainer`	`revenue_container`
Opportunities — Deal	Opportunities > Deals > [*Select a deal*] > Edit	`Deal`	`deal`
Opportunities — Event	Opportunities > Events > Events > [*Select an event*]	`Event`	`event`
Opportunities — Proposal	Opportunities > Proposals > Events > [*Select a proposal*] > Edit	`Proposal`	`proposal`
Opportunities — To Do	Opportunities > To dos > [*Select a to do*]	`Todo`	`todo`
Projects — Billing rule	Projects > [*Select a project*] > Financials > Billing > Rules > [*Select a billing rule*]	`Projectbillingrule`	`project_billing_rule`
Projects — Budget	Projects > [*Select a project*] > Financials > Budget Transactions> [*Select a budget transaction*]	`Budget`	`budget`
Projects — Issue	Projects > [*Select a project*] > Issues > [*Select an issue*]	`Issue`	`issue`
Projects — Issue stage	Administration > Application Settings > Projects > Issue Stages > [*Select an issue stage*]	`IssueStage`	`issue_stage`
Projects — Phase	Projects > [*Select a project*] > Phases/Tasks > [*Select a phase*]	`Projecttask`	`project_task`
Projects — Project task type	Administration > Application Settings > Projects > Task types > [*Select a task type*]	`Projecttask_type`	`project_task_type`
Projects — Recognition rule	Projects > [*Select a project*] > Financials > Recognition > Rules > [*Select a recognition rule*]	`Revenue_recognition_rule`	`revenue_recognition_rule_amount`

Record type	Form navigation path	API object	Database table
Projects — Recognition transaction	Projects > [*Select a project*] > Financials > Recognition > Transactions > [*Select a recognition transaction*]	Revenue_recognition_transaction	revenue_recognition_transaction
Projects — Revenue stage	Administration > Application Settings > Invoices > Revenue stages > [*Select a revenue stage*]	RevenueStage	revenue_stage
Projects — Project stage	Administration > Application Settings > Projects > Project stages > [*Select a project stage*]	ProjectStage	project_stage
Projects — Task	Projects > [*Select a project*] > Phases/Tasks > [*Select a task*]	Projecttask	project_task
Projects — Task assignment	Projects > [*Select a project*] > Phases/Tasks > [*Select a task*] (grid columns under the Assignments form section)	Projecttaskassign	project_task_assign
Purchases — Accounts payable location	Administration > Application Settings > Purchases > Accounts payable locations > [*Select an accounts payable location*]	—	accounts_payable
Purchases — Carrier	Administration > Application Settings > Purchases > Carriers > [*Select a carrier*]	—	carrier
Purchases — Fulfillment	Purchases > Fulfillments > [*Select a fulfillment*]	Fulfillment	fulfillment
Purchases — Manufacturer	Administration > Application Settings > Purchases > Manufacturers > [*Select a manufacturer*]	—	manufacturer
Purchases — Product	Administration > Application Settings > Purchases > Products > [*Select a product*]	Product	product
Purchases — PO	Purchases > POs > [*Select a PO*] > Edit	Purchaseorder	purchaseorder
Purchases — Purchase item	Purchases > POs > [*Select a PO*] > Purchases items > [*Select a purchase item*]	Purchase_item	purchase_item
Purchases — Purchase request	Purchases > Purchase Requests > [*Select a purchase request*] > Edit	Purchaserequest	purchase_request
Purchases — Purchaser	Administration > Application Settings > Purchases > Purchasers > [*Select a purchaser*]	Purchaser	purchaser
Purchases — Receiving location	Administration > Application Settings > Purchases > Receiving locations > [*Select a receiving location*]	—	receiving
Purchases — Request item	Purchases > Purchases Requests > Request items > [*Select a project stage*]	Request_item	request_item
Resources — Booking	Resources > Bookings > [*Select a booking*]	Booking	booking
Resources — Booking requests	Resources > Booking requests > [*Select a booking request*] > Edit	Booking_request	booking_request
Resources — Booking type	Administration > Application Settings > Resources > Booking types > [*Select a booking type*]	BookingType	booking_type

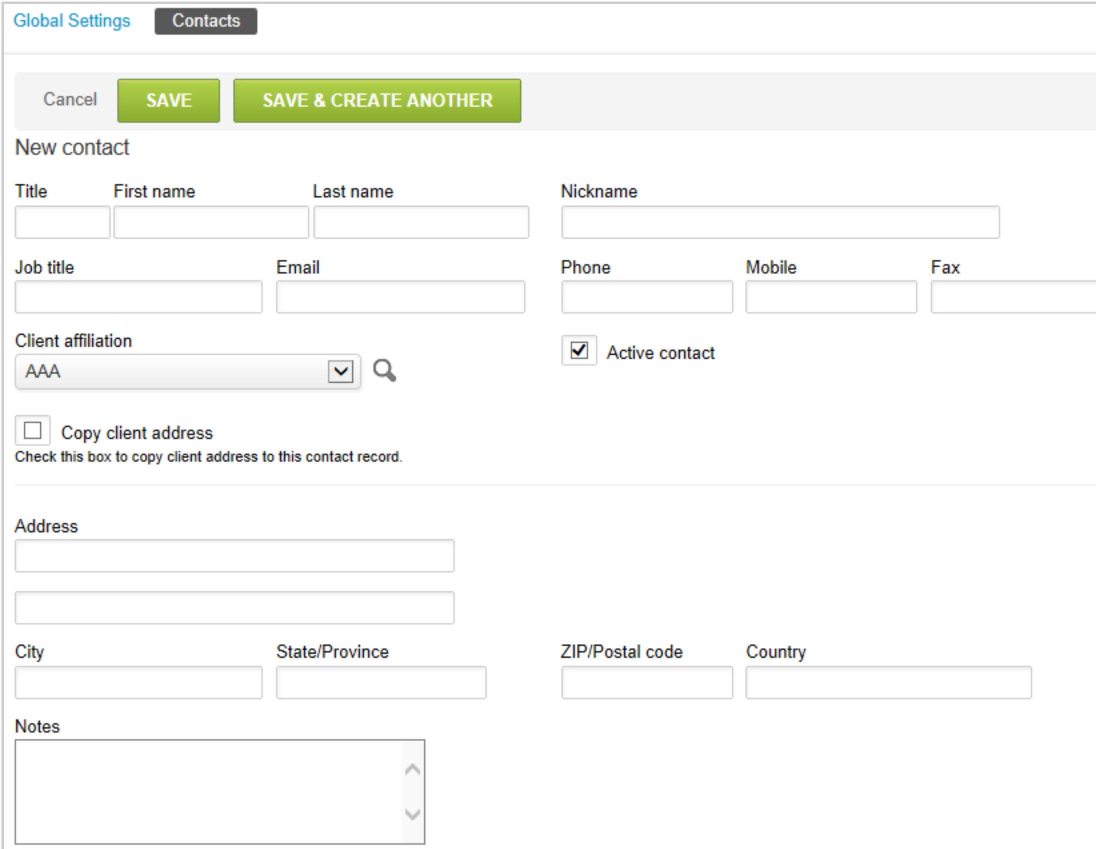
Record type	Form navigation path	API object	Database table
Resources — Deal booking request	Resources > Deal Booking Requests > [*Select a deal booking request*] > Edit	—	deal_booking_request
Resources — Resource request	Resources > Resource Requests > [*Select a resource request*] > Properties	ResourceRequest	resource_request
Resources — Resource request queue	Resources > > Resource Request > [*Select a resource request*] > Resource Request Queues > [*Select a resource request queue*] > Properties	ResourceRequestQueue	resource_request_queue
Timesheets — Payroll type	Administration > Application Settings > Timesheets > Payroll types > [*Select a payroll type*]	Payrolltype	payroll_type
Timesheets — Time card	Timesheets > Timesheets > [*Select a timesheet*] > Edit (Additional time card form for each day)	Timecard	time_card
Timesheets — Time entry	Timesheets > Timesheets > [*Select a timesheet*] > Edit (Additional information form for a time entry)	Task	task
Timesheets — Time off request	Timesheets > Time off requests > [*Select a time off request*] > Edit	Schedulerequest	schedule_request
Timesheets — Time type	Administration > Application Settings > Timesheets > Time types > [*Select a time type*]	Timetype	time_type
Timesheets — Timesheet	Timesheets > Timesheets > [*Select a timesheet*] > Edit	Timesheet	timesheet
Workspaces — Discussion	Workspaces > Workspaces > [*Select a workspace*] > Discussions > [*Select a discussion*] > Edit	—	discussion
Workspaces — Document/Folder	Workspaces > Workspaces > [*Select a workspace*] > Documents > [*Select a document/folder*] > Edit	Attachment	attachment
Workspaces — Workspace	Workspaces > Workspaces> [*Select a workspace*] > Properties	Workspace	workspace

Customers

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Customers. The following lists them in the order in which they display on the Global Settings window. The following lists them in the order in which they display on the Global Settings window.

- Contacts
- Customer Locations
- Customers
- Prospects

Contacts

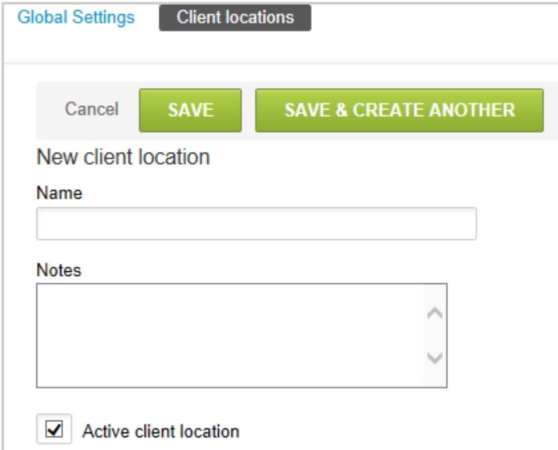


A Contacts link becomes available for a customer when you save the Customer form. You may also create a Contact using the Contact link. However, you must associate it with an existing Customer. Contacts may be anyone your company wishes to track within OpenAir. See Customers.

One special type of contact is the Billing contact. Contacts designated as a billing contact are available for association on the project form. You also use them in the invoice process by including contact information in the invoice address section. If the billing contact has an email address entered in OpenAir, you may also choose to email invoices to the designated billing contact after the invoice has been approved. See Customer Billing Information.

Enter the first and last name in the contact form as well as the associated customer record. All other fields are optional. If you have entered customer address information, you may optionally copy the customer address to the contact by selecting the **Copy customer address** check box or override the address by typing in the address fields. Although the email address field is an optional field, it is useful to enter since other features within OpenAir allow communication to contacts with email addresses. You can send email messages to contacts specified in reports or an invoice generated for the customer.

Customer Locations



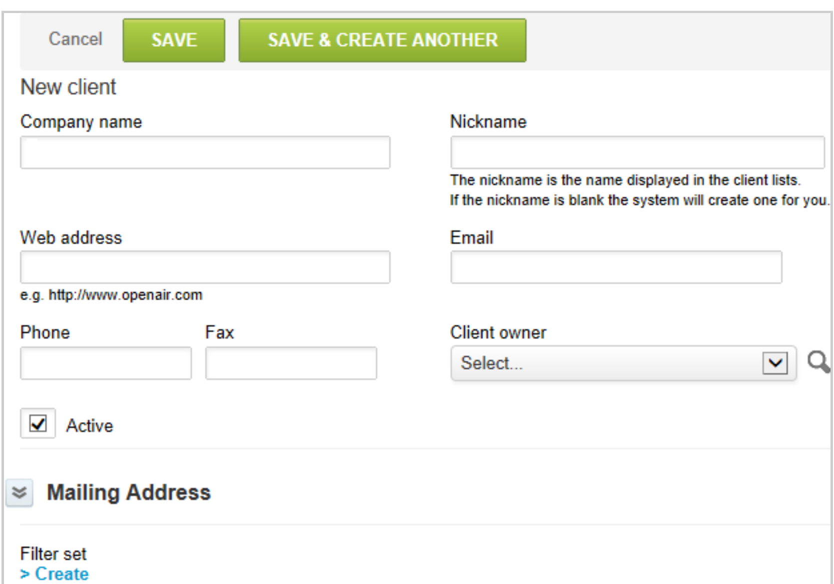
Create and store customer location attributes at the customer entity level. You can then use these attributes for reporting. Sample customer locations could be by state, by city, by country or any customized list of values.

To create Customer Locations:

1. Go to Administration > Global Settings > Customer location.
2. Select **New Customer location** from **Create Button**.
3. Enter the location Name along with any Notes, if desired.
4. Click Save.

Customers

Your company may use the term customer or customer. Depending on your company's terminology preferences, different titles may display on these forms. In this manual, we are using customer.



We define customers as those who drive business within your company. You can keep customer information very basic or cover all information about the customer, depending on what other systems you may be using to track customer information.

To create Customers:

1. Go to Administration > Global Settings > Customers > Customers.
2. Select **New Customer** from the **Create Button**.

   The New customer form displays.
3. After you save it, the information displays on the Edit demographic information form. To access it, click the Demographic link.

> **Note:** The Customer form asks for two basic pieces of information: Company Name and Nickname. Each is explained as follows.

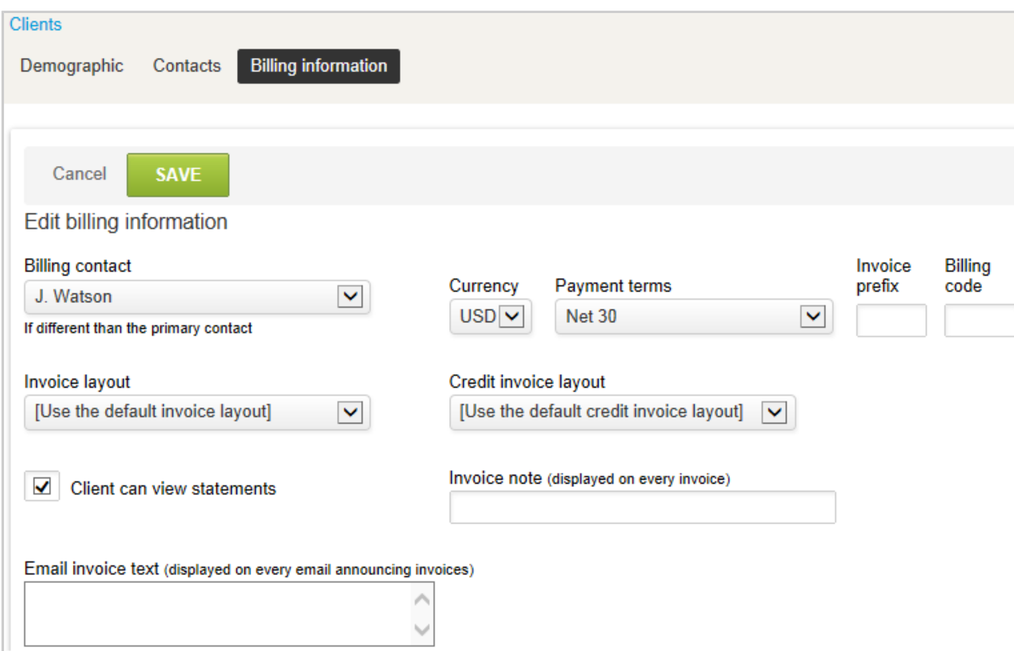
Company Name — is the official corporate name of the customer and is used within OpenAir on reporting and invoices.

Nickname — is a shortened version of the company name that is used throughout the user unterface of OpenAir to save space on page views. The nickname does not appear on invoices. However, it does appear on formatted application reports such as Timesheets and Expense reports.

You may optionally enter customer address information on the Customer form along with a designated customer location and customer owner. If you enter a customer owner, this resource becomes available for inclusion in the review or approval of items related to the customer project such as timesheets and invoices. Basic customer tracking information for sales such as territory, customer source, business type, and so forth are provided for optional entry if the Opportunities application is enabled in your account. See Opportunities.

> **Note:** We recommend that you always set up a customer account for your own company. You can use it for the internal tracking of projects.

Customer Billing Information



A Billing information link becomes available for a customer after you save the Customer form. Billing information includes Currency, Payment terms, Invoice prefix, Billing code, and a standard invoice approver, which may be left blank if control is desired within the project.

A default set of Payment terms is supplied by OpenAir. However, you may create customized payment terms. See Payment Terms.

The Invoice prefix lets you define a prefix for the customer, which will allow sequential numbering based on the value of the prefix. This provides customer level or ownership level invoice numbering. For example, if a set of customers is uniquely owned by an office or country, you can set an invoice prefix on all of these owned Customers to ensure the invoice numbering is sequential for the country or office. You may also choose an Invoice layout to use with this customer, as well as a specific Billing code if you use Billing codes in your company.

If you are invoicing customers out of OpenAir via email, Customers can view their statements or account status within your OpenAir account, provided you have selected the following check box on the Edit billing information form: Customer can view statements. OpenAir employees can view statements using Reports > Advanced > Customer statements.

Frequently Asked Questions (FAQs)

When would I use billing information at the customer level?

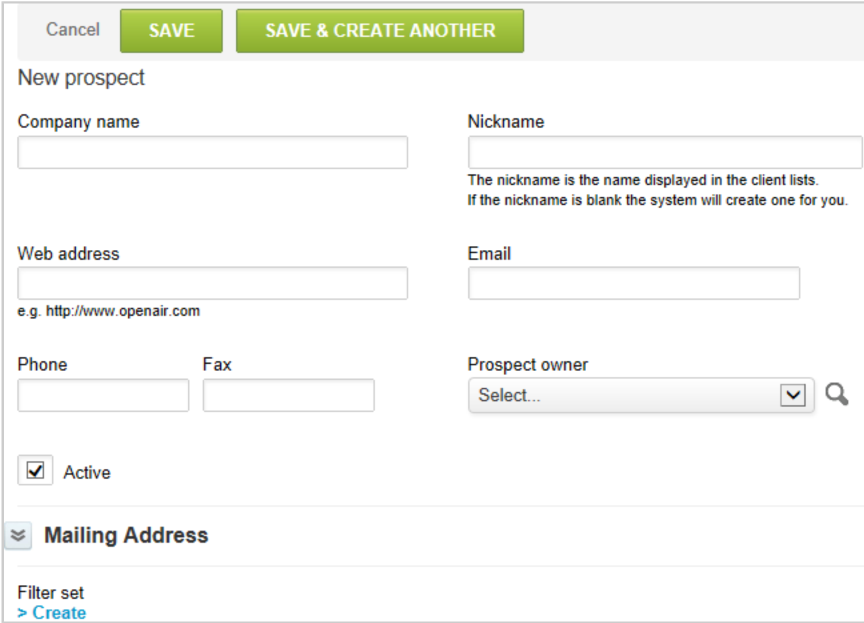
You generally use billing information at the customer level for one or more of the following reasons:

- You would like a specific person to approve all the customer's invoices.
- There is a specified hourly rate you want to use for this customer's billing and you are not using multiple rates by role, job code or service.
- There are particular payment terms for this customer.
- You want to designate a special invoice prefix on all invoices for this customer.
- You want to use a certain invoice layout for this customer.
- There are particular notes you want to display on the invoice or email text.

How do the settings on the customer billing information form work with project level settings?

If you leave items blank on the project form, the customer billing definitions are used. If invoice text or notes are added at the project level, the customer information and project information are added together on the invoice. The invoice approver is included in the invoice routing regardless of the project level settings.

Prospects



Prospects are potential customers against which deals are being proposed. Prospects are only used in the Opportunities application and may be converted to customers at a later stage. The information captured for prospects is similar to that of customers without the information regarding billing. The link does not display for prospects.

To create Prospects:

1. Go to Administration > Global Settings > Customers > Prospects.
2. Select **New Prospect** from the **Create Button**.

Display

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Display. The following lists them in the order in which they display on the Global Settings window.

- Customer Display Options
- Email Settings
- Email Templates
- Interface: Display
- Interface: Other
- Interface: Terminology
- Logos: UI, documents
- Print Settings
- Regional Settings
- Time Settings

Customer Display Options

Customer display options let you control how customers are displayed on OpenAir forms.

The following settings are available:

- Show additional fields for search

Show additional fields for search

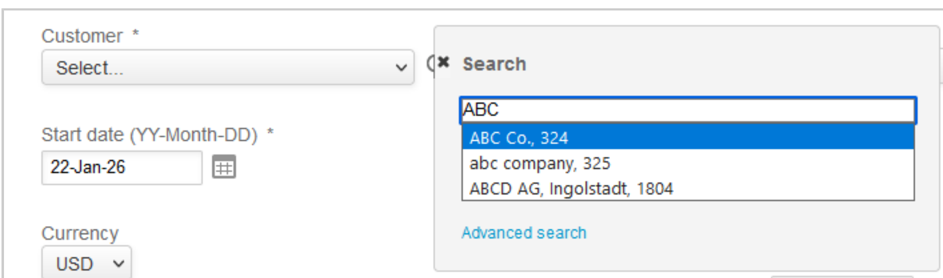
If you have multiple customers with similar names, additional information may be needed to identify the correct customer record when selecting a customer from a dropdown list or using the Customer search on entity forms.

Use this setting to select which additional fields are shown in the dropdown lists and search results.

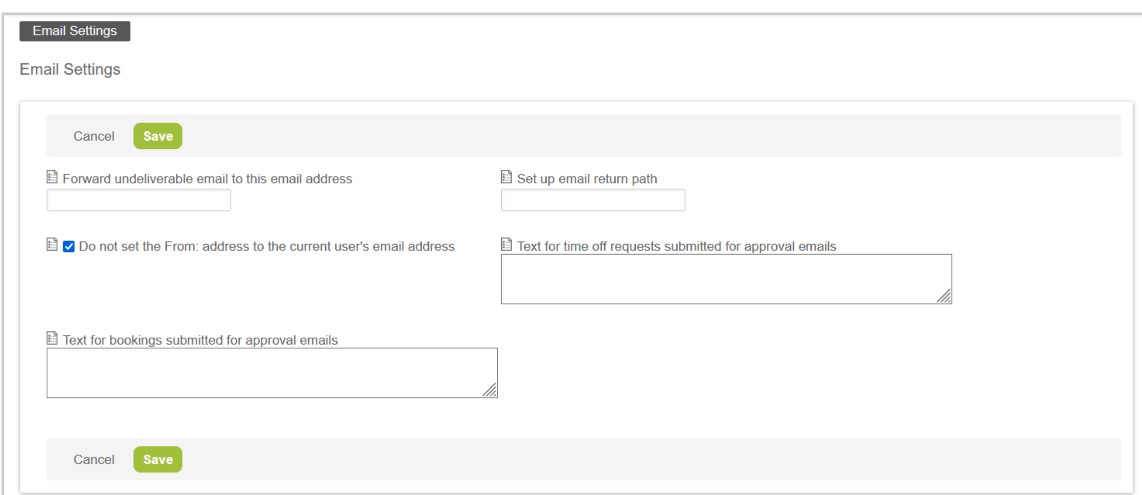
By default, the customer dropdown lists on entity forms only include the customer **Name**. When the **Number of entries to display in Customer dropdowns** is set to a finite number in your personal settings, a search tool is also available. By default, the search results only include the customer **Name**.

You can configure OpenAir to show up to three additional standard or custom field values separated by a comma on the customer dropdown lists and search result lists if your role allows you to view the information.

The additional field values also show on Customer dropdown lists when using the Redesigned Advanced Filters optional feature.



Email Settings



Email Settings contains options related to the handling of email within OpenAir. Each is explained as follows.

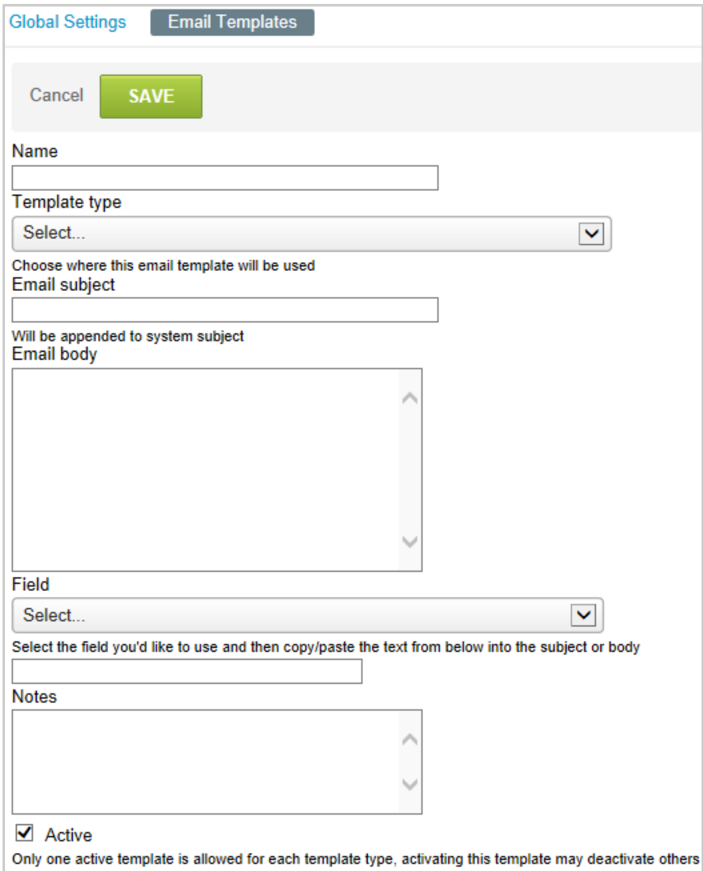
- **Forward undeliverable email to this email address:** Each employee must have an email address entered on their account, however the email address may be invalid. Any email such as notification or approval requests sent to an invalid email address are forwarded to the email address identified in this field. The account administrator or a distribution list of account administrators should be designated here to handle invalid email addresses encountered by OpenAir email. If a value is not entered, then undeliverable email are ignored by OpenAir.
- **Set up email return path:** By default, the `Return-Path` header (sometimes referred to as "envelope address") is set to `www@openair.com` by the OpenAir email relay server for all email messages originating from OpenAir. If you have a DMARC policy for your domain, this results in failing SPF alignment when the OpenAir application sends an email message with a user email address in the `From` header. You can set up OpenAir to change the `Return-Path` to a custom value when appropriate, depending on the scenario. If a custom return path is specified for your account and the custom return path domain matches the email header in the `From` domain, the OpenAir application sets the `Return-Path` header to this custom return path and tells the OpenAir email relay not to modify the `Return-Path` header.

  For more information, see the help topic Custom Email Return Path.
- **Do not set the From: address to the current employee's email address:** Email generated by an employee's account such as a timesheet approval request, displays the employee's return email address by default unless you have selected this option. If you do not want the employee's return email address to show up in email generated by OpenAir, the return email address reads: `www@openair.com`. A reason you may want to consider doing this is that some of the less configurable email servers reject email coming from the OpenAir domain with your company's email address, incorrectly thinking it is spam email.

  Some features in OpenAir, such as scheduled reports and alerts, let users specify a custom sender email address for system-generated email. When the **Do not set the From: address to the current employee's email address** box is checked, the custom sender email is ignored and all email is sent from `www@openair.com`.
- **Text for time off requests submitted for approval email:** The content of the time off request submitted email can be defined here using key field names that can be substituted with field values within OpenAir. The allowed fields are:
  - SUBMITTERNAME
  - TIMETYPENAME
  - STARTDATE
  - ENDDATE
  - DAILYDETAIL
  - TOTALHOURS
  - URL
  - SCHEDULEREQUESTNAME
  - DESCRIPTION
  - CATEGORYNAME
  - CUSTOMERNAME
  - PROJECTNAME
  - PROJECTTASKNAME
- **Text for booking requests submitted for approval email:** Similar to the time off request email, the content of booking request email can also be defined here. To enter the content, type in the desired

text and add in the available OpenAir fields as appropriate (typed in all caps bracketed by “%”). This enables OpenAir to substitute the field value for each of these field names.

Email Templates



> **Note:** You should use **Notifications** instead of email templates.

The email templates are similar and the New Project email template is presented as a sample.

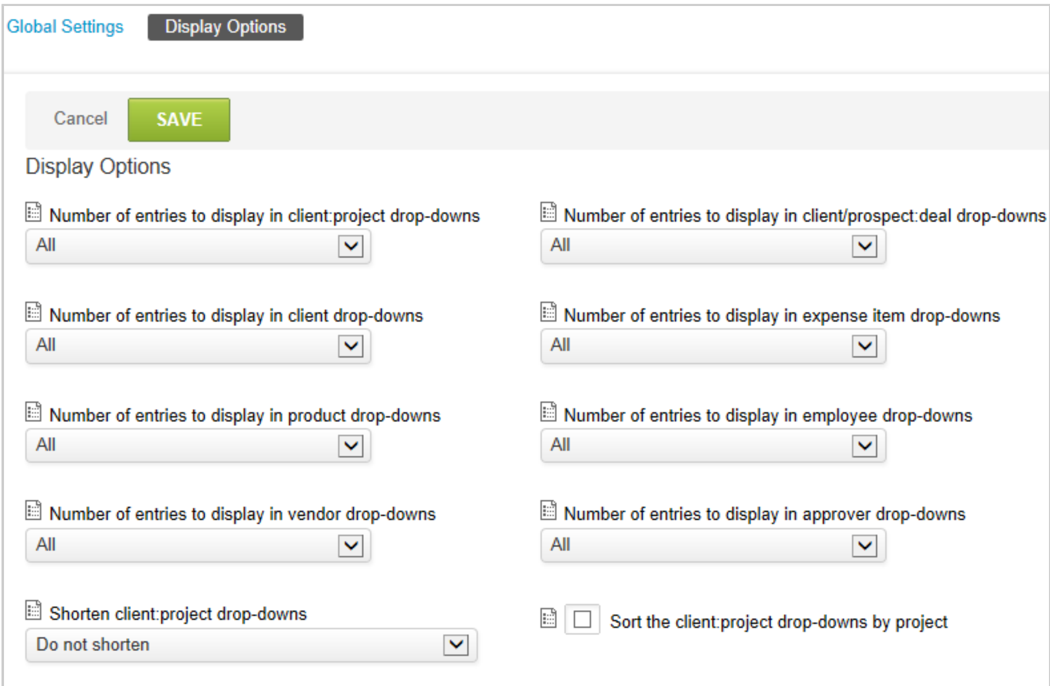
You can create many email templates associated with applications. They can also be customized in OpenAir if additional information is needed to be displayed within the email. Project email messages are created when a Project owner is added to a new project, existing project or removed from a project.

To create an email template:

1. In the template form, enter the Name and select the Template type. This is where you use a drop-down list to customize the email for the application you selected.
2. For Project email templates, the options are: New project owner on new project, new project owner on existing project, and removed project owner.
3. Add the Email subject, which is appended to the default subject. The Email subject and the Email body can be a combination of free form text and OpenAir fields.

4. To add OpenAir fields, choose the field from the drop-down list titled Field. After a field is selected, the field code displays under the Field. You can copy and paste this field code into the subject or email body. The field code pulls the value from the associated entity and displays it in the email.
5. Notes may be added to further explain the email template's purpose or description. You can only have one active template for each Template type. By creating and activating this new template, other templates of this type are deactivated.

Interface: Display



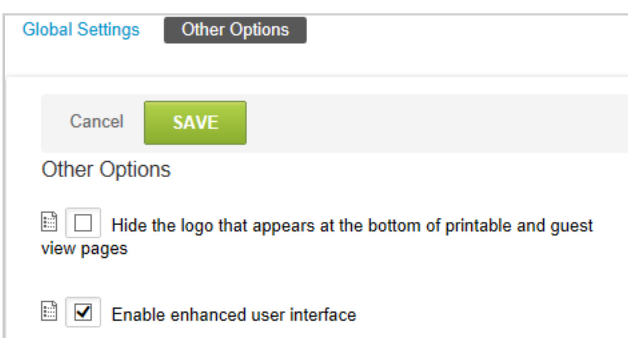
The Display Options allow you to select various presentation elements to the employees of your company's OpenAir environment. These elements may be enabled or disabled at any time. The options are listed below.

To access the Display options:

1. Go to Administration > Global Settings > Display > Interface: Display. Display options include:
   - Number of entries to display in drop-downs
   - Shorten the customer:project drop-downs by omitting the customer name
   - Sort the customer:project drop-downs by project
   - Sort the task drop-downs by name and omit the ID number prefix
   - Hide the 'My Calendar' tab
   - Maximum number of rows to display per day in 'My Calendar' monthly view
   - Show 'My Calendar' tab in all applications
   - Show booking type for bookings as summary on the calendar
   - Show custom fields for bookings as summary on the calendar

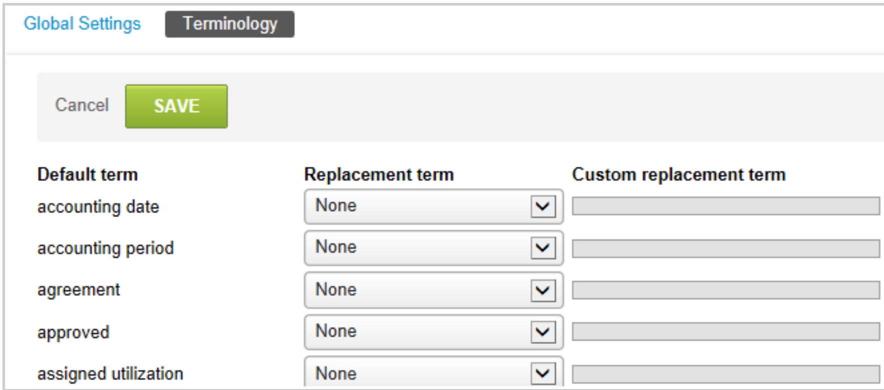
- Show custom fields for bookings as detail on the calendar
- Show custom fields for task assignments as summary on the calendar
- Show custom fields for task assignments as detail on the calendar
- Show Account tab in 'My Account' application only
- Remember the size of popup windows
- Disable automatic resizing of popup windows
- Add the save or run button to the top right of forms
- Add "Save and create another" button to the top right of forms
- Add approval buttons to the bottom of reports
- Anchor column titles at the top of page when scrolling vertically
- Preserve row highlighting when checking checkboxes in list views
- Enable anchoring of left columns when scrolling horizontally
- Hovering over menu links reveals menu options
- Enable collapsible sections in forms
- Enable dynamically collapsible sections in hierarchy lists
- Open popups as panels instead of windows
- Use on-page panel instead of popup for Time entry notes dialog on timesheet
- Show cost tab and/or form if employee can view any of the loaded cost levels
- Hide the help tab
- Hide the support tab
- Hide the help panel on forms
- Hide the footer tips and toggle link
- Control the data density displayed in list views with selected mode
- Control the data density displayed in timesheet grid with selected mode.

Interface: Other



You use the Interface: Other Options to Hide the logo that appears at the bottom of printable and guest view pages, and to Enable enhanced user interface.

Interface: Terminology



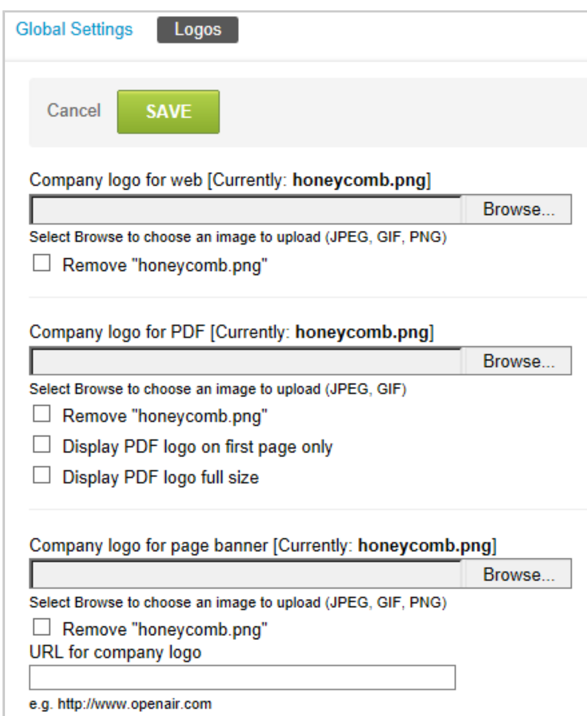
The Terminology form lets you override OpenAir's standard terms with your company's specific terminology. For example, this is where you designate using a term such as customer versus client versus patient, or service versus activity. Overriding the standard terminology in OpenAir helps ease the adoption of OpenAir by employees because the terms are more familiar to them. If you choose to override a term, OpenAir replaces all references of this term throughout OpenAir.

Note: You only need to enter the replacement term in its singular form. OpenAir automatically generates the plural term where applicable.

To access the Terminology option:

1. Go to Administration > Global Settings > Display > Interface: Terminology

Logos: UI, documents



The Logos tab lets you enable the display of your company's logo within OpenAir and on documents such as invoices.

To configure Logos:

1. Go to Administration > Global Settings > Display > Logos: UI, documents.

There are 3 main parts to the logo form:

- Company logo for web
- Company logo for PDF
- Company logo for page banner

Company logo for web — displays on the OpenAir HTML documents such as expense reports, invoices, proposals, POs, purchase requests, booking requests, deal booking requests and time off requests in the upper left corner of the document.

Company logo for PDF — displays on the OpenAir PDF documents such as expense reports, invoices, proposals, POs, purchase requests, booking requests, deal booking requests and time off requests in the upper left corner of the document. Since PDF documents may be more than one page long, OpenAir provides the option to print your company logo only on the first page of a multiple page document. This option saves page space on pages 2 through “x”. With formatting options for the various reports available including top margin, you also have the option to force the logo to print in its full size and ignore the top margin restrictions on any particular report.

- If the **Display PDF logo full size** option is turned **off**, the report top margin as set up in OpenAir (depending on the application producing the report) is respected and the logo is resized to fit within the margin if it is too large.
- By selecting the **Display PDF logo full size**, the logo always prints to the size of the uploaded file and any top margin settings are ignored.

Company logo for page banner — displays on the OpenAir application pages in the corner of the header. You should use a logo size of 100 pixels or smaller to avoid using too much header or page space. The formats supported are general picture file formats including .jpeg, .gif, and .png.

To load company logo for page banner:

1. Select the Browse button.
2. Locate the file from your desktop or company server to upload.
3. Click Save.
4. If you have loaded a logo that you would like to change, simply select another file to load and Save. The new file replaces the old file.
5. To remove a logo that has been loaded, check the **Remove** box below the logo file field. The remove box only displays if a logo exists for the particular option.

> **Note:** You also have the option to link your company's URL with the displayed company logo throughout the OpenAir application. This gives employees the ability to jump into your company's website, ending their OpenAir session. If you do not set the URL field, clicking on your company logo defaults to the OpenAir home page:
>
> https://www.openair.com

Frequently Asked Questions (FAQs)

My logo is displaying too large. How can I shrink it?

For PDF documents, verify if you are forcing the reports to **Display PDF logo full size**. If so, clear the selection and save the logo settings form. This enables the page top margin setting to be honored and OpenAir to auto-size the logo to fit within the document header. If the logo is displaying too large on the OpenAir pages, you need to load a smaller logo from your company's marketing department. You should use a logo size is 100 pixels or smaller, depending on the nature of your logo.

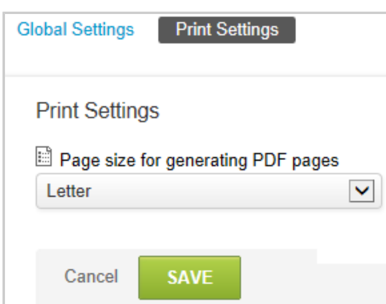
Can I load more than one type of logo?

Yes, however you may only use one logo per type of display such as a logo for your PDF reports, a logo for your web reports, and a logo or no logo for your OpenAir application web pages. You cannot have multiple logos loaded for PDF documents, for example. There is one exception to this and that involves the Invoice Layout configuration forms. Each invoice layout may use a unique logo as loaded into the layout template.

Will OpenAir accept other formats for logos such as .bmp or .eps?

No. Attempts to load these types of files result in no file being uploaded to OpenAir. You must use the designated file types: jpg, gif, or png.

Print Settings



OpenAir uses the values set within the Print Settings form as default settings for any new employee records. Print Settings determine the style of paper used when generating PDF pages.

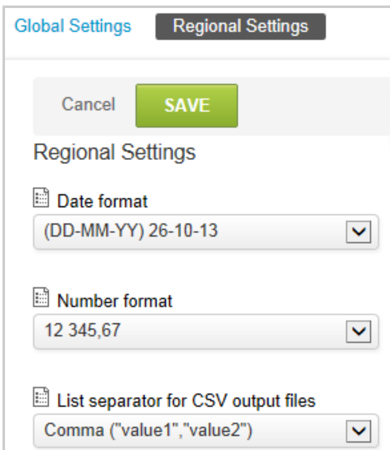
To access Print settings:

1. Go to Administration > Global Settings > Display > Print Settings.

Print settings PDF pages generated in OpenAir are configurable for printing within the specific applications that produce the PDF file. Options such as top and bottom margin may exist as well as font size. The print settings option assumes you are using a single paper size type for all printed documents out of OpenAir. The size types available are either Letter (8.5” x 11”) or A4 (approx. 8.25” x 11.75” or 21cm x 29.5cm). The value you chose for the print setting enables OpenAir to set the location of the margins according to the size of the paper.

Note: Individual employees are able to change these settings to provide themselves with a more personalized look and feel to OpenAir. See Personal Settings.

Regional Settings



OpenAir uses the values set within the Regional settings form as default settings for any new employee records. Regional Settings provide how particular fields display on the forms and reports. For example, dates can display in the North American or the European date format.

To access regional settings options:

1. Go to Administration > Global Settings > Display > Regional Settings.

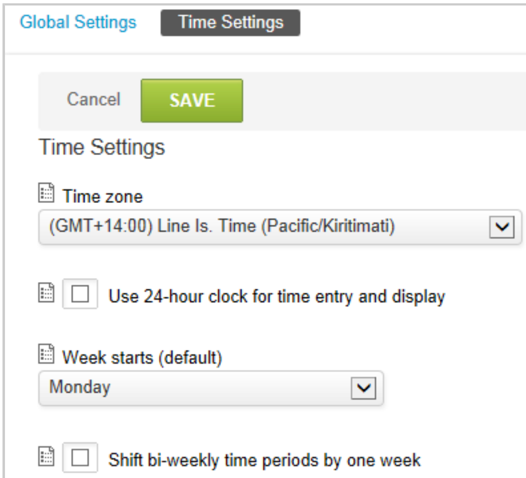
Date format: Throughout OpenAir, objects that are created or modified are dated. Setting the date format converts the dates to your desired format.

Important: Reports can be created and shared with custom dates entered according to the report owners date format. The sharing of reports with employees that have enabled a different date format causes the report to either interpret the custom date as the wrong value or as an invalid date. For example: Take a June report that has been hardcoded to start on 6/1/12 using a MM/DD/YY date format. If this report is shared with someone who is using a European date format such as DD/MM/YY, the report runs for January 6th, 2012 as the start date instead of June 1st, 2012. If you are using OpenAir on a global basis, you should set up reports using relative date values such as This Month or Last Quarter whenever possible.

Number format: The symbols defining decimals and thousands should be set according to your company headquarter's standard. Employees may override the number format and can display the numeric information using regional symbols for decimals and thousands (for example ,12,345.00 in the US can be expressed for European employees as 12.345,00).

List separator for CSV output files: When downloading data into CSV format, a comma is the typical delimiter in the Americas; however, in European countries other delimiters are typically used. OpenAir supports the configuration of the delimiter to separate data columns in downloaded reports. This enables an easier export to column formats within Microsoft Excel. Comma is the default value within OpenAir.

Time Settings



OpenAir uses the values set within the Time Settings form as default settings for any new employee records. Time Settings set the time display for your particular company's location.

To access Time settings :

1. Go to Administration > Global Settings > Display > Time Settings.

Time Zone: Throughout OpenAir, objects that are created or modified are time-stamped. The time zone setting converts the time values to your desired time zone.

Use 24-hour clock for time entry and display: Checking this option enables time to be displayed in military or Coordinated Universal Time format such as 22:00 for 10:00 pm throughout OpenAir.

Week starts (default): This is an important default that defines the start of a week in your OpenAir configuration. Reporting may be done in daily, weekly, monthly, semi-monthly, and annual time periods. Each of these settings has a defined beginning and end except “weekly.” The day of the week identified here is assumed to be day 1 of a 7 day week. Select the day of the week from the drop-down that indicates the beginning of your company's week.

Shift bi-weekly time period by one week: When you select this option, the first created item for the next time period starts one week later than the next available date. This is useful when converting your organization from a weekly to bi-weekly time capture process.

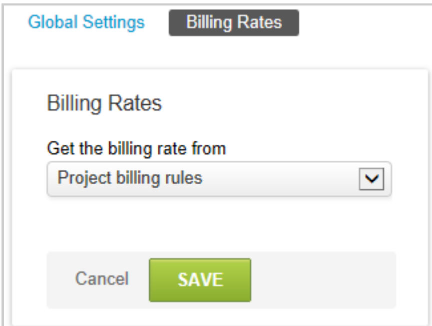
Jobs, Rates

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Jobs, Rates. The following lists them in the order in which they display on the Global Settings window.

- Billing Rates
- Cost Centers

- Job Codes
- Rate Cards

Billing Rates



OpenAir lets you select how OpenAir determines hourly Billing Rates. The options are: Service, Service / Customer, Employee, Employee / Project, Customer / Project, and Project billing rules. This is a global setting that controls all billing rates in OpenAir. Therefore, you cannot choose Service for one customer and Project billing rules for another.

Important: We strongly recommend that you use Project billing rules. Changing to another method from Billing Rules hides Billing Rules in your OpenAir account and may create confusion among your employees who do billing.

Note: Your company may use the term Service or Activity. Depending on your company's terminology preferences, one or the other displays in selections on this form.

To access the Billing Rates:

1. Go to Administration > Global Settings > Jobs, Rates > Billing Rates.

Service — This selection determines the billing rate to the customer based on the various kinds of services performed. These rates apply to all Customers.

Service / Customer — This selection is similar to the Service type noted above as the rate is based on the various kinds of services performed. The difference is that with this option, the Service rates dialog appears on the Customers form and lets you designate the billing rates for the kinds of services performed specifically for this customer. This is useful if you have preferred Customers for which you discount your services.

Employee — Choosing the Employee option selects the billing rate entered in the employee's Demographic record for the billing rate.

Employee / Project — This setting enables the Employee billing rate tab. The Employee billing rates link displays. By selecting this link, you are able to set billing rates by employee for this particular project.

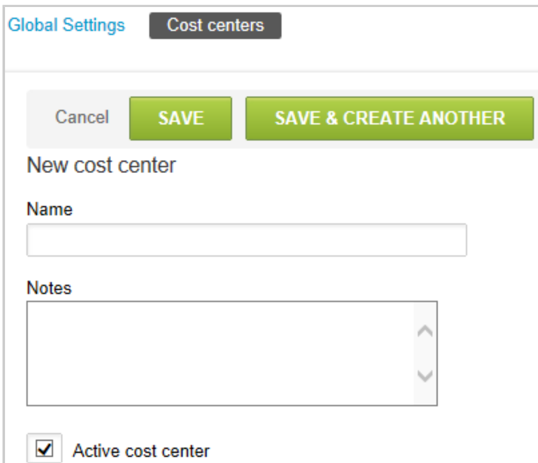
Note: The Employee billing rates link is not available via the Projects application, only through the Administration application.

Customer / Project —This setting enables the Billing information tab. If you create a new or edit an existing customer, you can then set a specific rate to be charged on all projects for this customer. The

Employee billing rates link displays. This is useful if you charge a blended rate for all work done for a customer.

Project billing rules — Selecting this option provides you with the most flexibility in billing the customer. You can create billing rules for every project based on the terms of the particular contract or statement of work. You can use hourly billing rates, fixed fee, and receipt based billings.

Cost Centers



Cost centers function as a reporting and accounting tool to track costs related to expense receipts and employee time entries. You can associate cost centers with the following entities: Customers, Projects, Tasks, Services, Time types, Expense Items, and Employees.

To create Cost centers:

1. Go to Administration > Global Settings > Jobs, Rates > Cost Centers.
2. Select **New Cost center** from the **Create Button**.
3. Enter the Name and Notes. By default, Active cost center is selected.
4. Click Save. After saving the form, the list of cost centers will be displayed and you can click on links to set Receipt rules and Time entry rules.

Explanation:

Receipt rules — determine which receipts within expense reports are assigned to the cost center. Receipt rules can be set by Customer, Project, Task, Expense Items, and Employee. You can then chose multiple selections.

When an employee creates and saves an expense report, the associated expense item is checked against the receipt rule selections. If a receipt matches a selected item that is associated with a cost center, the cost center is assigned to the receipt. If no item is found, then no cost center is assigned.

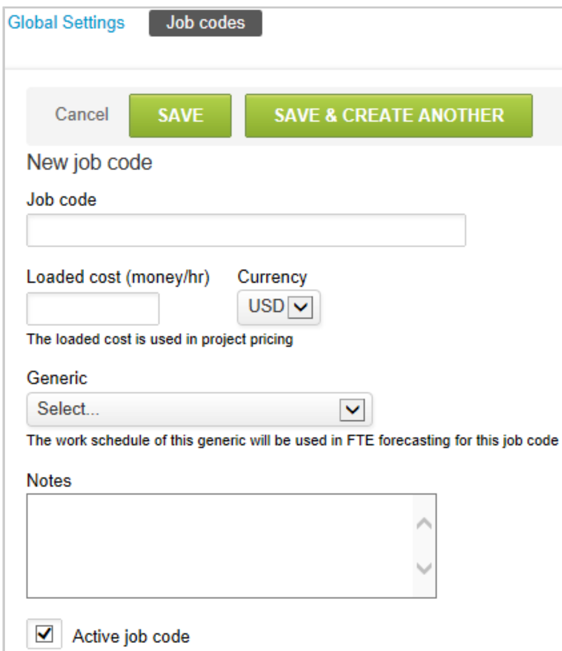
There are multiple selections in case there is not one uniform way that costs are associated to a cost center, i.e., you can select a project and then an employee. In the majority of instances, the expense receipt is stamped with a cost as derived from its associated project. In the absence of a cost center on a project, OpenAir looks for the cost center associated to the employee, if applicable, to stamp the expense receipt. The same applies to time entries.

Time entry rules — determine which time entries are assigned to the cost center. Time entry rules can be set by Customer, Project, Task, Expense Items, and Employee. You can chose multiple selections.

When an employee creates and saves a timesheet, the associated time entry items are checked against the time entry rule selections. If a time entry matches a selected item that is associated with a cost center, the cost center is assigned to the cost, which is determined by multiplying the time entry by the employee's associated cost. If no item is found, then no cost center is assigned.

When an item is selected, a Cost center field is added to the form for that entity. You need to associate each item you selected with its appropriate cost center by editing these entities individually. For example, if you create a Employee cost center called US Employees, and have Employee for Receipt Rules, you then need to go to each employee in the US Group and add them to the US Group cost center on the Employee Demographic record.

Job Codes

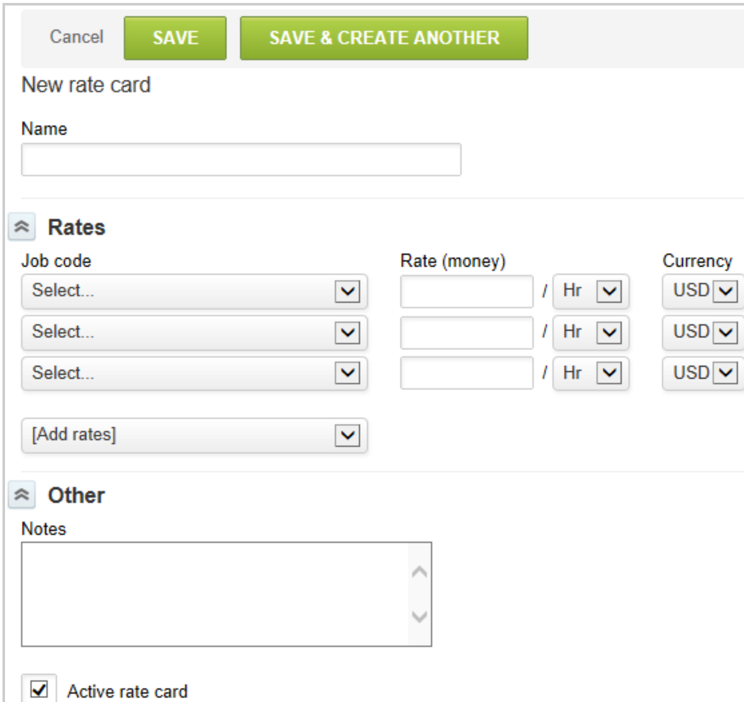


Job codes classify employees into general job positions defined by your company. Job codes are not necessarily job titles at the company. They are normally used as a type of employee that you bill out to a customer. You can give job codes a generic cost for calculating estimated margins without named resources. You can also give job codes a bill rate within a rate card. For example, you may create a Project Manager, Consultant, and Engineer job code. Generic resources may be associated with a job code to inherit rates for forecasting purposes. See Rate Cards.

To create Job codes:

1. Go to Administration > Global Settings > Job codes.
2. Select **New Job code** from the **Create Button**.
3. Enter the Job code name and Loaded cost per hour (used to calculate project costs for analysis), select Currency, and associate with a Generic resource.
4. Add Notes, if desired.
5. Click Save.

Rate Cards



Use rate cards to define bill rates for a group of job codes. You can use rate cards to determine billing rates in Project Billing Rules as well as Project estimating based on job codes. You can create multiple rate cards, which is helpful if you negotiate different bill rates per job code, per customer. For example, for Customer ABC, a project manager bills at $150 per hour; however, for Customer XYZ, a project manager bills at $140 per hour. In this example, you would have two rate cards for each billing arrangement.

Note: To view the list of rate cards, go to Administration > Global Settings > Job, Rates > Rate Cards > Rate Cards.

To view the list of rates set in all your rate cards, go to Administration > Global Settings > Job, Rates > Rate Cards > Rates.

To create Rate cards:

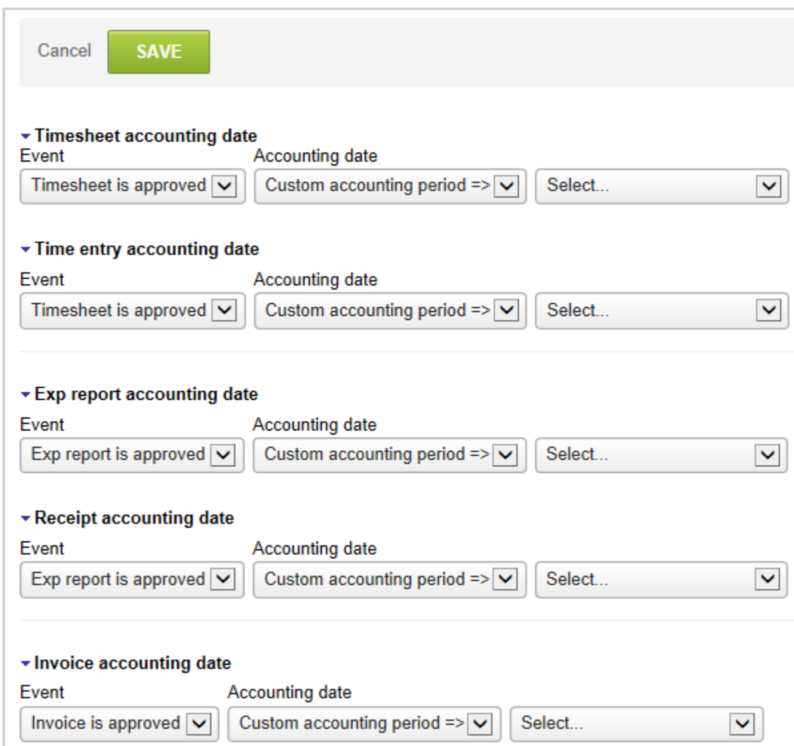
1. Go to Administration > Global Settings > Jobs, Rates > Rate Cards.
2. Select **New Rate card** from the **Create Button**.
3. Enter the rate card Name.
4. In the Rates section, select the Job code from the drop-down list (job codes must be previously created in OpenAir), the Rate (per hour) to be charged, and the Currency. See Job Codes.
5. Add Notes for additional description, if desired.
6. Click Save.

Organization

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Organization. The following lists them in the order in which they display on the Global Settings window.

- Accounting Dates
- Accounting Periods
- Approval Options
- Currencies
- Departments
- Hierarchy
- Name & Address
- Projects
- Tag Groups
- Tax Locations
- Tax Options
- Work Schedules

Accounting Dates



OpenAir provides a useful feature in allowing you to establish Accounting Dates for a variety of transactions. You can associate Accounting Dates with timesheets, time entries, expense reports, receipts, invoices, revenue containers, and recognition transactions as well as with reports drawing from these accounting dates. The ability to maintain separate accounting dates can be particularly helpful when the original transaction date of an entity must be independent from the financial accounting date, as signified by a financial report or general ledger application.

Accounting dates can be populated automatically at a particular time, such as transaction creation, and with a particular date.

Note: This is not equivalent to accounting period functionality as seen in a financial system. This feature permits transactions to be tagged with an additional date value to keep reporting consistent within a particular accounting period. Discuss this feature with OpenAir Professional Services before deciding on whether this functionality is applicable in your account.

To enable accounting date functionality, Creating a Support Case and request that the following switch for accounting periods be enabled: Enable the accounting period feature to manage transaction dating (Support - Check with Sales before enabling).

To set up Accounting dates:

1. Go to Administration > Global Settings > Organization > Accounting Dates.

The selections available in the drop-down lists for the Accounting date configuration vary according to the entity that is being set up. For each entity, select an event and then select an associated accounting date. For example:

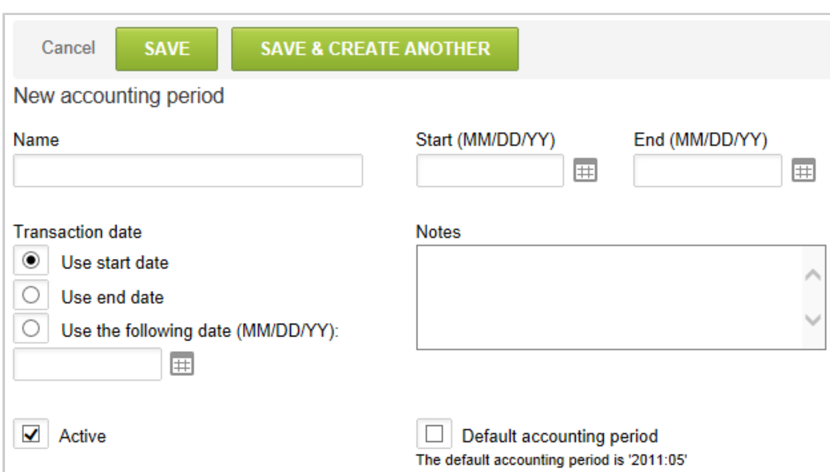
- Timesheet events include: Timesheet created, Timesheet submitted, and Timesheet approved.
- Timesheet Accounting Dates include: Timesheet start date, Date timesheet is created, Date timesheet is submitted, Date timesheet is Approved, Custom date, and Custom Accounting period.

The drop-down values are similar to the above for time entries, expense reports, receipts, and invoices. These drop-down values are the events in OpenAir that trigger the stamping on an accounting date onto the transactions. For example, when a Timesheet is submitted, the time entry is stamped with an accounting date of today's date.

After you select the settings and save the form, the accounting dates for the associated transactions are populated automatically according to the accounting date event and the chosen date. Any accounting date can be manually updated by editing the individual transaction and over-writing the accounting date.

Note: The automatic population of accounting date for charges and revenue recognition transactions can be set up within the billing and revenue recognition rules. See Accounting Periods.

Accounting Periods



The accounting period functionality lets you associate separate accounting dates with most transactions as well as with reports drawing from these accounting dates. The ability to maintain separate accounting dates can be particularly helpful when the original transaction date of an entity must be independent from the date, as signified by a financial report or general ledger application.

Review the following examples:

- Charges on an invoice dated July 5th need to be associated with the month of June in the general ledger since the charges were incurred in this month. In this example, the invoice transaction date would be 07/05/12, however, the invoice accounting date might be 06/01/12.
- A receipt incurred in March needs to be posted to the financial system in June. In this example, the receipt transaction date might be 03/17/12, while the receipt's accounting date might be 06/01/12.

The accounting period functionality lets you associate an additional independent accounting date with a transaction. You can then configure reports to leverage the accounting dates, rather than the original transaction dates. The accounting date functionality is enabled with the accounting period functionality.

To enable this functionality, Creating a Support Case and request that the following switch be enabled: Enable the accounting period feature to manage transaction dating (Support - Check with Sales before enabling). After you have activated the accounting period functionality, the following transactions have an acct_date field available:

- Invoices
- Charges
- Expense reports
- Receipts
- Timesheets
- Time entries
- Revenue recognition transactions
- Agreements
- Customer PO's
- Fulfillments
- Purchase items
- Purchase Orders

To create an Accounting period:

1. Go to Administration > Global Setting > Organization > Accounting periods.
2. Select **New Accounting period** from the **Create Button**.
3. Name the accounting period (Ex: P1 November 2012).
4. Select the start and end date for this period (Ex: 11/01/12 and 11/15/12).
5. Select the Transaction date for this period. This is the date that displays in the accounting date field when a transaction is created and associated manually or automatically with this Accounting Period.
6. Add any relevant notes to the Notes field that may be helpful. (For example, you might type, “This is the first of two accounting periods in November 2012.”)
7. Check the **Active** box, unless the accounting period does not need to be active at the moment. (Inactive accounting periods do not show up in drop-down lists for association with transactions).

8. Check the **Current accounting period** box to which the accounting period should be referenced if and when the current accounting period is selected in any billing or revenue recognition rules setups.
9. Click Save.

To auto-populate Accounting Dates charges through Project Billing rules:

1. Go to Projects and select a project. Go to Billing > Billing rules.
2. Drill into the billing rules. Under the Accounting date setup, **How to get the accounting date field**. Select either:
   - Use the accounting date specified below
     If this is selected, the **Accounting date** field must be populated with a specific transaction date.
     OR
   - Use the accounting period specified below
     If this is selected, the Accounting period drop-down listed below must be populated with a specific accounting period, or more commonly, the dynamic current accounting period selection. If you select the current accounting period, the accounting period that has the **Current accounting period** box checked is used.
3. Click Save.
   The next time the billing rule is run, charges generated have the Accounting date populated according to the Accounting Period setup within the rule.

To update the Accounting Dates on charges:

1. Go to Projects and select a project. Go to Billing > Billing rules.
2. To update the accounting date one charge at a time, drill into a charge and manually update the accounting date field.
3. To update the accounting date on charges in bulk, go to the open charges tab within the Invoices application. Select the check boxes next to the charges that need to be updated, click the run-an-action icon, select **Change the Accounting Date to** and select the appropriate accounting period.
4. Click OK.

> **Note:** Access to the accounting dates is controlled by an employee's application role and can be hidden on forms using form permissions. See Form Permissions.

To auto-populate Accounting Dates on Revenue Recognition Transactions through Revenue Recognition rules:

1. Go to Projects and select a project. Go to Recognition > Recognition rules.
2. Drill into the revenue recognition rules. Under the Accounting date setup, designate How to get the accounting date field. Select either:
   - Use the accounting date specified below
     If this is selected, the **Accounting date** field must be populated immediately below with a specific transaction date.
     OR
   - Use the accounting period specified below
     If this is selected, the Accounting period drop-down immediately below must be populated with a specific accounting period, or more commonly, the dynamic Current accounting period

selection. If the current accounting period selection is picked, the accounting period that has the **Current accounting period** box checked is used.

3. Click Save.
   The next time revenue recognition is run, these updated rules create revenue recognition transactions that have the Accounting date populated according to the Accounting Period setup within the rule.

To update the Accounting Dates on revenue recognition transactions:

1. Go to Projects and select a project. Go to Recognition > Recognition rules.
2. To update the accounting date on one revenue recognition transaction, drill into a revenue recognition transaction and manually update the accounting date field.
3. To update the accounting date on revenue recognition dates in bulk across a project, drill into a project and go to the revenue recognition transactions tab. Select the check boxes next to the charges that need to be updated, click the run-an-action icon, select **Change the Accounting Date to** and select the appropriate accounting period. Click OK.

Updating Accounting Dates Automatically

You can update an accounting date manually, or arrange to have the accounting date automatically populated at a particular time. See Accounting Dates.

This applies to the following:

- Timesheets
- Time entries
- Expense reports
- Receipts
- Invoices
- Revenue containers
- Recognition transactions

Approval Options

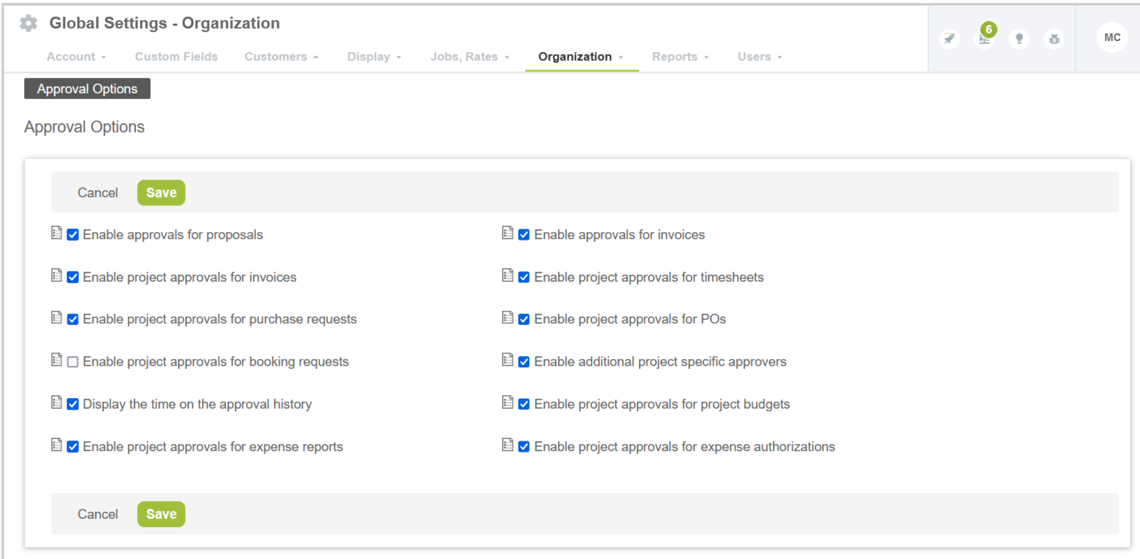
You can configure OpenAir to require approval for certain type of transactions before these transactions can be processed. Some transaction approvals are available as standard when the transaction type is enabled, other transaction approvals are optional. To control most optional transaction approvals, go to Administration > Global Settings > Organization > Approval Options.

- To enable employee- or customer-level approval routing for a type of transaction, check the **Enable approvals for <transaction_type>** box.
- To enable project-level approval routing for a type of transaction, check the **Enable project approvals for <transaction_type>** box.
- OpenAir lets you designate specific employees on the project record (**Project approver 1**, **Project approver 2**, and **Project approver 3**) to approve transactions for this project as part of an approval process. When this functionality is enabled, you can create approval processes and route approvals to the designated project approvers using the metavalues `[Project approver 1]`, `[Project approver 2]`, `[Project approver 3]`.

  To enable this functionality, check the **Enable additional project specific approvers** box.

> **Note:** OpenAir skips the approval level and the transaction is approved automatically at this approval level if:
>
> - A `[Project approver <n>]` metavalue is included in an approval process at the user level.
> - The project approver is not specified on the project properties form.

- To include the time when the transaction was submitted, approved or rejected in the approval history for the transaction record, check the **Display the time on the approval history** box.



The following table lists the transaction record types for which employee-, customer-, or project-level approval routing is available. Optional transactions approvals are indicated with a check mark. Transaction approvals available as standard with the transaction type, are indicated with the mention "Standard".

Transaction	Employee-level	Customer-level	Project-level
Authorization (Expenses)	Standard	—	✓
Booking *or* Booking requests	Standard	—	✓
Expense report	Standard	—	✓
Invoice Credit invoice Rebill invoice	—	✓	✓
Profile (Resources)	Standard	—	—
Project budget	Standard	—	✓
Proposal	✓	—	—

Transaction	Employee-level	Customer-level	Project-level
PO	Standard	—	✓
Purchase request	Standard	—	✓
Time off request	Standard	—	—
Timesheet	Standard	—	✓

> **Note:** To enable project-level approvals for bookings, contact OpenAir Customer Support. This is only available if the booking request functionality is not enabled for your account.

Currencies

Currencies Overview

OpenAir supports multiple currencies.

All OpenAir accounts include the capability to create expense receipts in any of the supported currencies even if all your business transactions are done in the default currency for your account. Account administrators can:

- Set the default currency for the account.
- View the list of supported currencies, including the market exchange rates for these currencies (updated daily). See Viewing Exchange Rates.
- Override market exchange rates with company exchange rates. See Setting Company Exchange Rates.

If your business uses more than one currency for transactions, you can enable the Multicurrency feature. The Multicurrency feature provides support for transactions in currencies other than your default currency. For example, the feature lets you reimburse employees expenses, invoice customers, recognize revenue, and run reports in multiple currencies. After you enable the feature, you can:

- Set the different currencies your company uses for transactions. See Enabling Multiple Currencies in OpenAir
- Set a **Currency** for all relevant entity records and work with multiple currencies in OpenAir.
- Download historical currency cross rates as a CSV file.

Additional optional features also give you access to advanced multicurrency functionality, for example:

- The ability to modify historical currency cross rates.

  > **Note:** This feature requires the Edit Exchange Cross rates optional feature to be enabled for your account, in addition to the Multicurrency feature.

- The ability to define arbitrary custom currencies for reporting purposes.

  > **Note:** This feature requires the User-Defined Reporting Currencies optional feature to be enabled for your account.

To enable the Multicurrency feature and discuss advanced multicurrency functionality, contact your OpenAir account manager or OpenAir Professional Services. You cannot disable the feature after you create transactions and records that rely upon it.

Viewing Exchange Rates

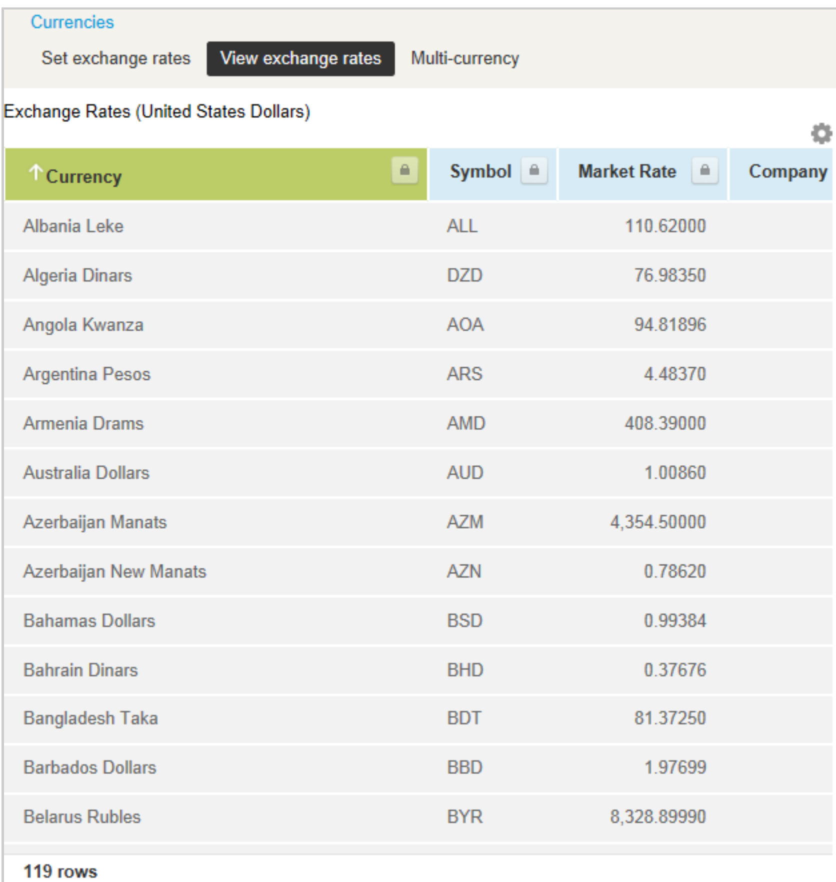
To view the exchange rates for all supported currencies, go to Administration > Global settings > Organization > Currencies > View exchange rates.

The Exchange rates list view includes the following information for each currency available in OpenAir:

- **Currency** — The name of the currency.
- **Symbol** — The three-letter currency code as per the ISO 4217 code list.
- **Market rate** — Current market value of the currency against the selected base currency. To select the foreign exchange rate base currency, go to Administration > Global settings > Organization > Currencies > Set exchange rates.

> **Note:** Market foreign exchange rates are updated daily using a data feed from Xignite around 3:00 a.m. Eastern Time (UTC – 5).
>
> To find the exact foreign exchange rates update schedule for your account, export your OpenAir data and include the alert table. The table shows all alert triggers configured for your account. Look for `trigger_hour` and `trigger_minute` values in the row with the `type` value `multi_currency`.

- **Company rate** — OpenAir lets you override the market foreign exchange rate value with a company rate. The company rate is used for all transactions and reports if it is set. The market rate is used otherwise. See Setting Company Exchange Rates.



Currency	Symbol	Market Rate	Company
Albania Leke	ALL	110.62000	
Algeria Dinars	DZD	76.98350	
Angola Kwanza	AOA	94.81896	
Argentina Pesos	ARS	4.48370	
Armenia Drams	AMD	408.39000	
Australia Dollars	AUD	1.00860	
Azerbaijan Manats	AZM	4,354.50000	
Azerbaijan New Manats	AZN	0.78620	
Bahamas Dollars	BSD	0.99384	
Bahrain Dinars	BHD	0.37676	
Bangladesh Taka	BDT	81.37250	
Barbados Dollars	BBD	1.97699	
Belarus Rubles	BYR	8,328.89990	

119 rows

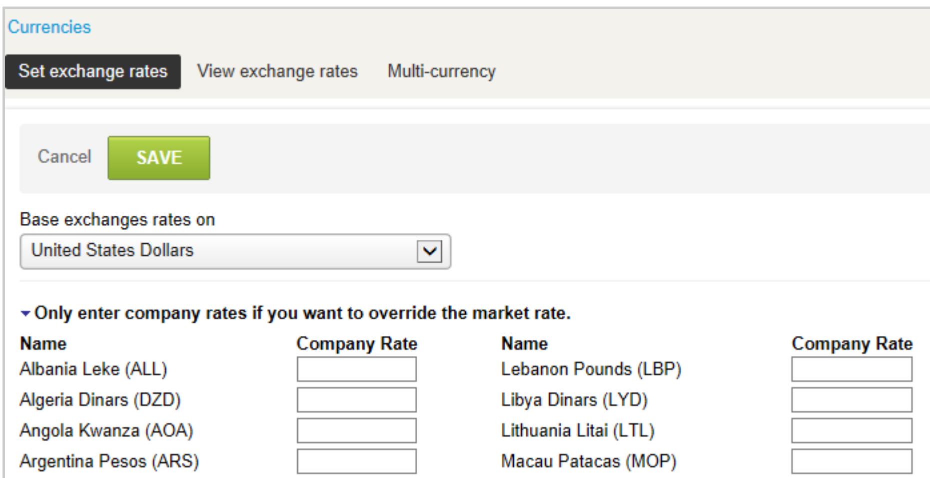
Setting Company Exchange Rates

OpenAir lets you override the market foreign exchange rate value with a company rate for each currency. The company rate is used for all transactions and reports if it is set. The market rate is used otherwise.

To change the base currency for foreign exchange rates or enter company exchange rates, go to Administration > Global settings > Organization > Currencies > Set exchange rates.

- To change the base currency for foreign exchange rates, select a currency from the **Base exchange rates on** dropdown list.
- To set a company exchange rate for a currency, locate the currency on the form and enter the exchange rate value against the selected base currency in the box next to the currency name and code.
- Click **Save** to save any changes made on the Set exchange rates form.

After your set a company exchange rate, it appears on the Exchange rate list view. See Viewing Exchange Rates



Enabling Multiple Currencies in OpenAir

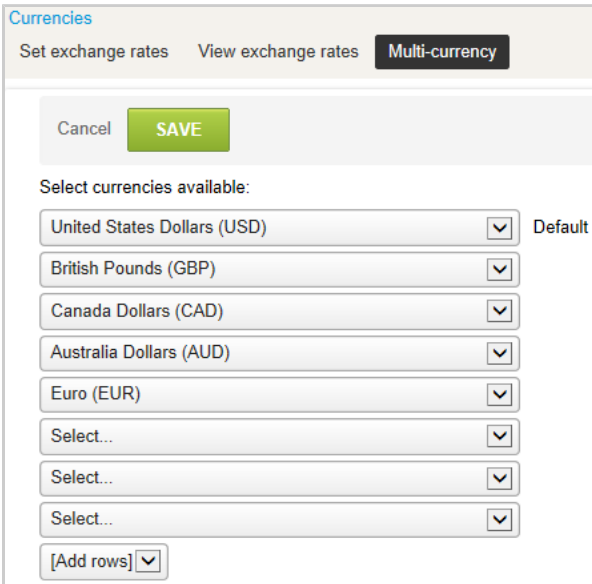
If your business uses more than one currency for transactions, you can configure OpenAir to support transactions in currencies other than your default currency. For example, the feature lets you reimburse employees expenses, invoice customers, recognize revenue, and run reports in multiple currencies. After you enable multiple currencies, you can set a **Currency** for all relevant entity records, include monetary fields for each configured currency in reports, and work with multiple currencies in OpenAir.

> **Note:** The Multicurrency feature is not required to create expense receipts in any of the system-supported currencies. If all your business transactions are done in the default currency for your account, you do not need to enable the Multicurrency feature. You cannot disable the feature after you create transactions and records that rely upon it.

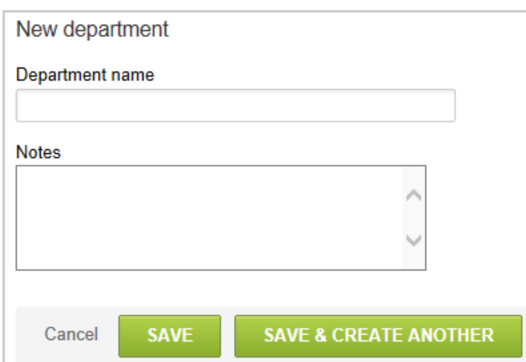
To enable multiple currencies in OpenAir:

1. Contact your OpenAir account manager or OpenAir Customer Support and request the Multicurrency feature.

2. Go to Administration > Global Settings > Organization > Currencies > Multi-currency.
3. Select the currencies your company conducts business transactions in. The first currency you select at the top of the form is your default currency. To add more rows, click the [Add rows] dropdown and select the number of rows you need to add.
4. Click **Save**.



Departments



Departments function as groupings of employees based on distinct criteria. The criteria can be defined based on your company's requirements. You can also use Departments to grant group access privileges and create customized approval procedures.

To create Departments:

1. Go to Administration > Global Settings > Organization > Departments. Select **New Department** from the **Create Button**.
2. Type the Department name.
3. Add Notes as applicable.

4. Click Save.

After the Department is created and saved, additional options display. They include:

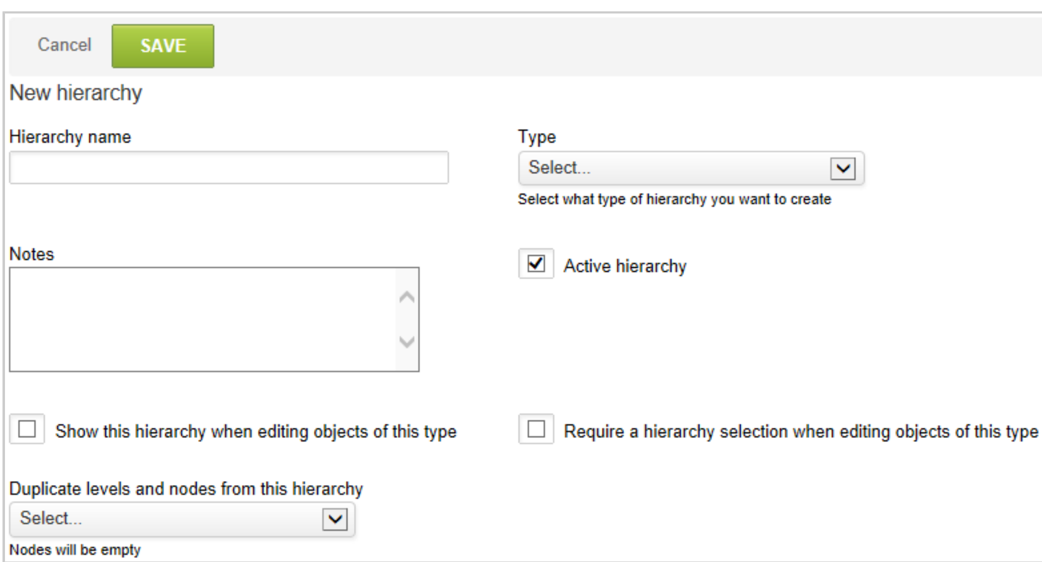
- **Assigned employees —** The Assigned employees option is where you can now assign employees to the department. A employee can only belong to one department. Employees available to be assigned display in the Available Items area. If an employee is not listed in the Available Items, then they have already been assigned to another department. You must unassign the employee from the old department before you can assign them to the new department. After all employees are assigned in the Selected Items area, save the form.
- **Edit —** After employees are assigned, you can Edit the Department form and add the Department head if applicable. The Department head must be an active employee and must be a member of the department.

> **Note:** Click the link to Modify the form permissions to display a message area. If departmental dashboards are active in your account, you can enter messages or notifications that are posted on the departmental dashboard when employees login to OpenAir. Only members of the department are able to view these messages.

- **Approvals —** Approvals allow you to set each employee's approver by function. The functions listed include: Timesheets Approver, Expenses Approver, Authorizations Approver, Proposal Approver, Purchase Request Approver, and PO Approver, provided these functions are enabled in your OpenAir environment. You can assign mass approvers to the department head, to a generic such as Manager or to an approval process. You can also choose named approvers by employee by function. After approvers have been assigned, save the form.

> **Note:** Approvers can also be assigned at the Employee level when a Employee is created or modified.

Hierarchy



Hierarchies are used to create hierarchal classification trees with employees, customers, and projects. A employee, project, and customer can only belong to one node at any particular moment within a hierarchy, but can belong to multiple hierarchies at one time if multiple hierarchies exist for a record. A employee project, and customer can also be moved between nodes with a hierarchy.

Hierarchies are used for subtotaling and filtering within Summary reports. For example, you may create a customer hierarchy based on geographical location that associates each customer with an office location such as a city. You could also create a two level hierarchy: city and state. Each level may have multiple nodes. The state level can have Texas, Georgia, and Washington. Or, at the city level you could have Seattle, Austin, Dallas, and Atlanta. Each city level node has a parent node such as a state. By assigning customers to a city, they are automatically also associated with the state.

To create Hierarchies:

1. Go to Administration > Global Settings > Organization > Hierarchies. Select **New Hierarchy** from the **Create Button**.
2. Enter the Hierarchy name and select the Type. Associate the hierarchy with either Employee, Project, or Customer.
3. Add Notes about this hierarchy, if desired.
4. OpenAir defaults the hierarchy to Active hierarchy status.
5. Check the **Show this Hierarchy when editing objects of this type** to make the field visible on the entity form.
6. Check the **Require a hierarchy selection when editing objects of this type** to make this field required.
7. You can duplicate levels and nodes of another hierarchy if this feature has been enable for your account. However, the nodes will be empty.
8. Save the form. The **Enable this hierarchy as a column in entity lists** box becomes available. Check this box to add the hierarchy to customized lists of data.

After you create a Hierarchy, then you create corresponding Levels and Nodes. When the hierarchy form has been saved, links to the Levels, Nodes and Entity (Customers, Projects or Employees) display on the Edit hierarchy form.

To create Levels:

1. Click on Levels link. Select New > Level.
2. Enter the Hierarchy level name. If this level is the topmost level, then no Parent is required. For all other levels below the topmost level, a parent is required.

   > **Note:** There can be only one topmost level for each hierarchy. If you do not select a parent for a level, OpenAir automatically places it as the topmost level and it becomes the parent of the previously topmost level.

3. Add Notes about this hierarchy, if desired.
4. Click Save.

You create Nodes in a similar manner to Levels, as described above. You cannot create Nodes until you have created Levels.

To create Nodes:

1. Click on Nodes link. Select New > Node.

2. Enter the Hierarchy node name and select the Parent the level to which it belongs.

> **Note:** There can be multiple Nodes at each level. When you create your Nodes, you can assign customers, projects, and employees to the nodes.

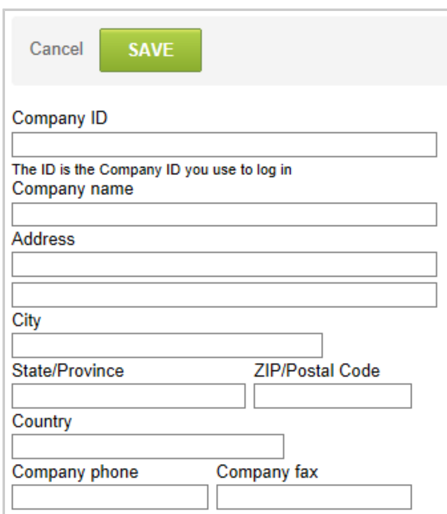
3. Click Save.

You are able to see a list of entities associated with the hierarchy. If a Project hierarchy is created:

- On the Edit hierarchy form, check the **Use to determine filter set access for projects** box if you want to use it in filter sets. This feature lets an employee have project access based on placement within a project hierarchy. See Filter Set Access Control.
- On the Edit project form, specify the node of the hierarchy in which the project belongs.
- On the Employee Demographic form, select which group of projects the employee has the right to use by picking the appropriate node or level of the hierarchy.

Note: Customers, projects, or employees can only belong to one node in each hierarchy. Therefore, it is useful to assign them to the most specific node. When you run reports, the employee, customer, or project are automatically rolled-up into the higher level parent nodes.

Name & Address



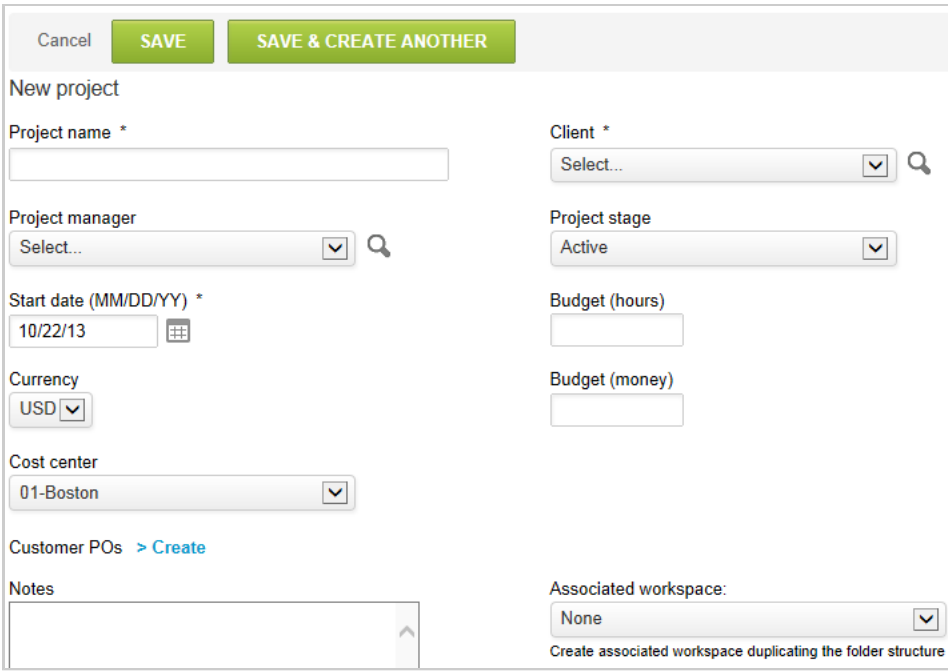
The Name and Address link displays the Company information form. This is where you enter company information such as name, address, phone number as contracted with OpenAir for billing purposes. The key field here is the Company ID, which is required to identify your company's instance during login to the OpenAir application. The Company ID may be changed if, for example, your company undergoes a name change.

To create or edit Company information:

1. Go to Administration > Global Settings > Organization > Name & Address.

Note: All active employees in your OpenAir account receive an email if the Company ID field is changed. This is a critical piece of information for accessing OpenAir. If changes are made to the other company information fields, no email notifications are sent to OpenAir users.

Projects



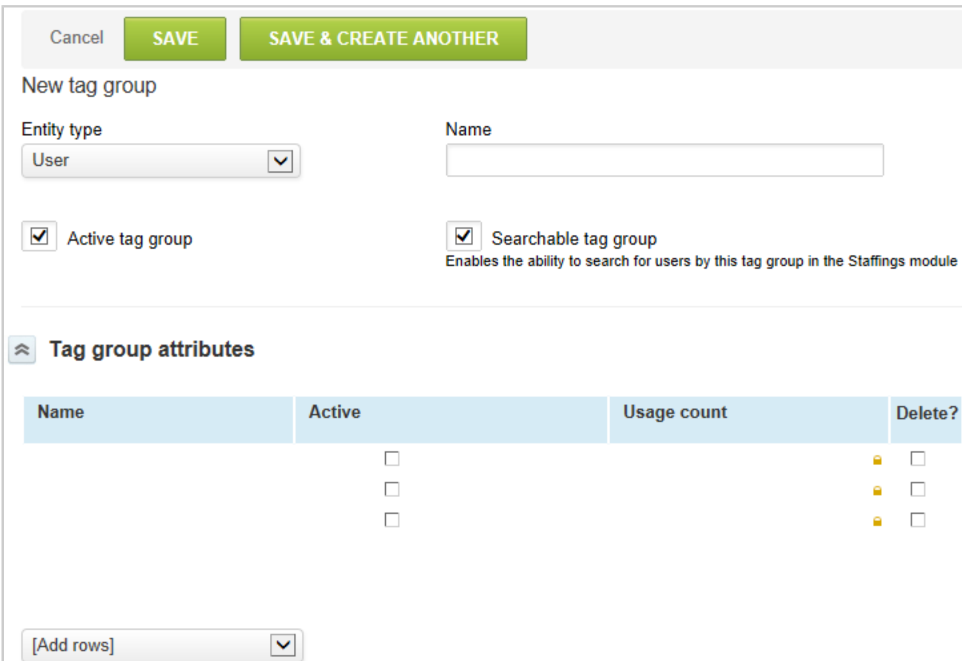
The Project form requires only a few fields to create a project: Project Name, Customer, and Start date. However, it lets you capture pertinent project information such as the following.

- **Project name —** The project name should be descriptive but short to preserve space on page displays and on reports.
- **Project owner —** The Project Owner drop-down can be set to the resource responsible for the information accuracy tracked on the project. This field setting has special use related to approval processes and reporting filters.
- **Project stage —** Remember, project stages must have been previously defined to be available for selection here. See Project Stages.
- **Start date —** The Start date is defaulted to today's date and, in most cases, signifies when the project is estimated to start.
- **Budget hours —** Indicates the effort estimated to complete the project activity. When budget hours is set, the budget alert feature within the projects application may be used to notify project owners when work expended on a project is within a defined threshold of the project budget.
- **Budget money —** The Budget money is where the contract value is typically entered. It is in the same currency set on the project.
- **Currency —** The currency displayed is OpenAir default, but may be overridden to be any defined currency within OpenAir. The billing rule currency defaults to the currency set on the project.
- **Billing code —** The Billing code is a free-text 2 digit field that may be used in the Invoices application for batch creation of invoice per billing code. Values set in the billing code field are not defined within OpenAir and should be set according to policy within your company, if used.

- **Invoice layout —** The Invoice Layout dropdown displays if you have defined invoice layouts in the invoices application. The default value is Default invoice layout, which is also set within the Invoice application options. Overriding the invoice layout value will define which invoice layout should be used when an invoice is generated for the project.
- **Agreements or customer POs —** If the customer has Agreements and Customer POs entered in OpenAir, an agreement and customer PO field is available allowing you to associate these entities with the project. Associating an Agreement or Customer PO with the project permits these items to be available for inclusion on billing rules, which will provide automatic balance tracking in OpenAir.

Note: You can also create and edit project information in the Projects application. See Projects.

Tag Groups



The Tag group functionality lets you create specific subgroupings of items in OpenAir such as a subgroup of employees. This is useful if you need to report on a group of items that is a subset or may cross several values in a particular entity. For example, using the Department may be too large of a group for your particular need and the tag group is able to pare down the selection. Or, you may want to classify the Consultants role into their area of expertise to report on the utilization for each of these subgroupings. For example, Financials or CRM consultants may cross organizational department and boundaries.

The difference between a tag group versus a custom field is that the tag group lets you track the changes in historical values. A custom field only shows and reports on the current value in OpenAir, whereas an employee's change in tag group values are represented throughout any time range in reporting.

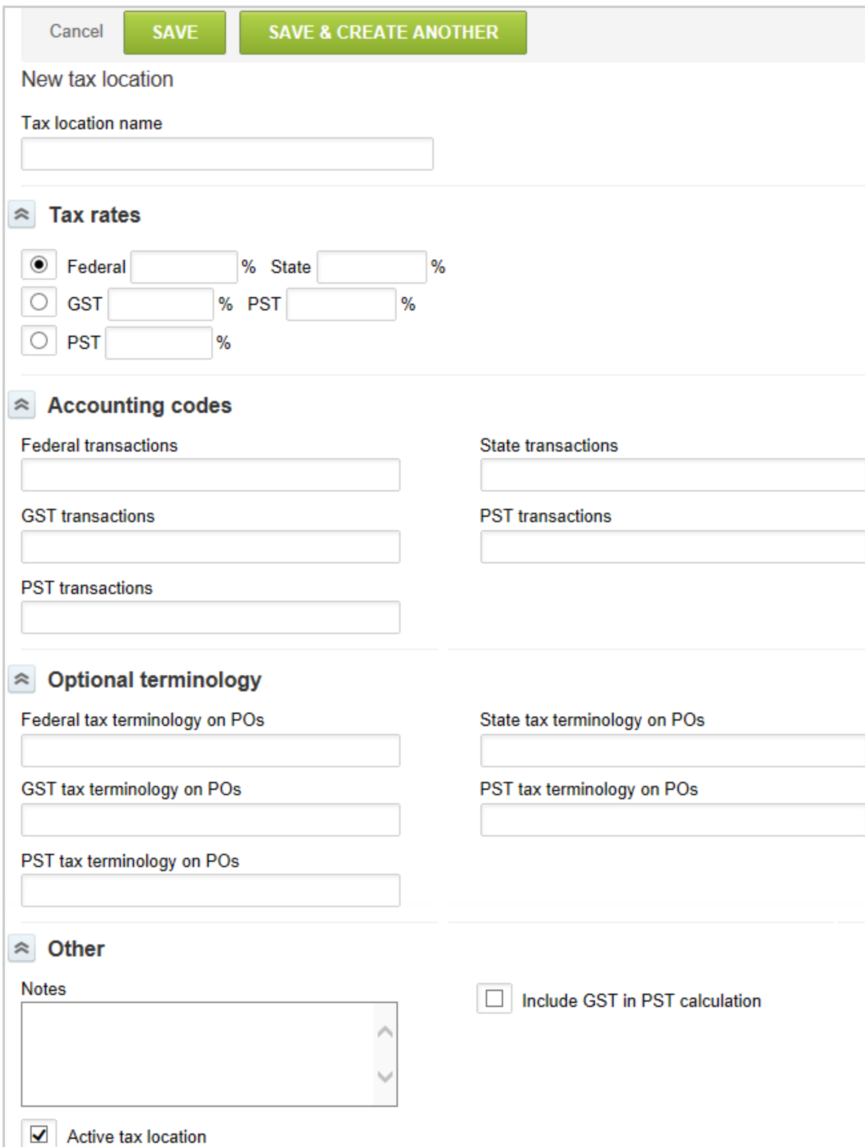
To create Tag groups:

1. Go to Administration > Global Settings > Tag group.
2. Select **New Tag group** from the **Create Button**.
3. Select Entity type. This is always Employee.
4. Enter the Name of the tag group and choose whether you would like this tag group to be searchable in the Resources application.

 OpenAir

5. Enter Tag group attributes for this group. For example, if you decide to have a tag group for city, attributes may be values such as Chicago, New York, Dallas, and San Francisco.
6. Check the **Active** box to indicate which attributes are active.
7. Click Save.

Tax Locations



Multiple tax locations can be established to handle sophisticated tax requirements. Tax locations allow for complex tax requirements.

Tax locations include:

- US federal and states taxes
- GST Goods and Services Tax (Canada, Australia)

- VAT (Europe, and other countries)
- PST (Provincial Sales Tax - Canada)
- HST (Harmonized Sales Tax - Canada)

To create Tax Locations:

1. Go to Administration > Global Settings > Organization > Tax Locations.
2. Select **New Tax location** from the **Create Button**.
3. Enter the Tax location name.
4. Select Tax rates for the type of tax and enter percentage amounts.
5. Type the Accounting code for each tax rate.
6. Type Optional terminology that displays on POs.
7. Add Notes, if desired.
8. Check the **Include GST in PST calculation** box if you want the GST to be added to the total before the PST percentage is applied.
9. Click Save.

After creating Tax locations, a Tax Location drop-down list is available within the following entities: Projects, Customers, and Employees.

To apply the taxes to an invoice, you must associate the appropriate Tax Location with the project.

When setting up an expense billing rule, the GST and HST tax amounts can be backed out if they are not application to be billed back to the customer.

Frequently Asked Questions (FAQs)

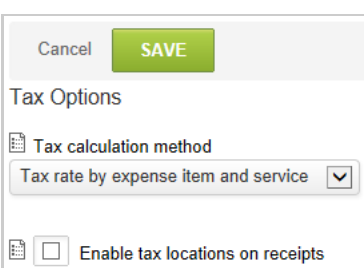
There are several tax options here such as Federal, State, and GST. How do I know which ones to set up?

This can be simple or complex depending on where your company and customers are located. We suggest contacting your company's Tax Accounting or Finance Department for guidance on which tax rate options should be set up in OpenAir.

Even if I have the proper tax rates set up in OpenAir, how can I make sure that they are applied properly on the invoices?

As mentioned above, taxation action items can be complex. Invoicing Customers should be controlled by your company's Accounting or Billing department. Taxation details are usually contained in the contract or statement of work with the customer.

Tax Options



Tax Options provide the ability to select and create various taxation scenarios within OpenAir. These are available in the Invoices and Expenses applications.

To create or edit Tax options:

1. Go to Administration > Global Settings > Organization > Tax Options.
2. Select the Tax calculation method. Three main methods exist for tax calculation.
   - **Tax locations —** allow the creation of individual tax settings, which consider taxation on a geographic basis. See Tax Locations.
   - **Tax rate by expense item and service —** permits the tax settings, which are based on individual expense items and services, to be applied when generating customer billings. See Expense Items in Expenses Settings and Expense Items and Service in Invoices Settings.
   - **Federal/State tax by project and vendor —** permits the entry of a tax location/rate directly on a project or vendor, which will be applied to customer billings.
3. Check the **Enable tax locations on receipts** box.
4. Click **Save**.

Enable tax locations on receipts — By default, taxes may be handled on invoices and taxable information will be computed based on associated services with timesheet hours, that is, the service is set up as taxable.

Expense Items and Products may also be set up as taxable. The tax calculation is applied based on the tax location set on the project, which is passed to the invoice, or set directly on the invoice. Optionally, receipts within an expense report may have unique taxes related to the location of where the expense was incurred. Select this option to display the tax location field on receipts for the entry of specific tax handling.

Other considerations when selecting this option are as follows:

- When you rebill expenses, do you remove the tax amount of the location where the expense was incurred and apply a standard tax rate, an option on the expense billing rule?
- Do you apply taxes in addition to the taxes captured for the receipt?
- Do you pass taxes directly through to the customer?

Work Schedules

Work Schedules define the work week within your company. You may create multiple calendars to define different work weeks. For example, you might define part-time schedules or work week hour variations might need to be addressed in different regions of your company. See Creating and Editing Company Work Schedules.

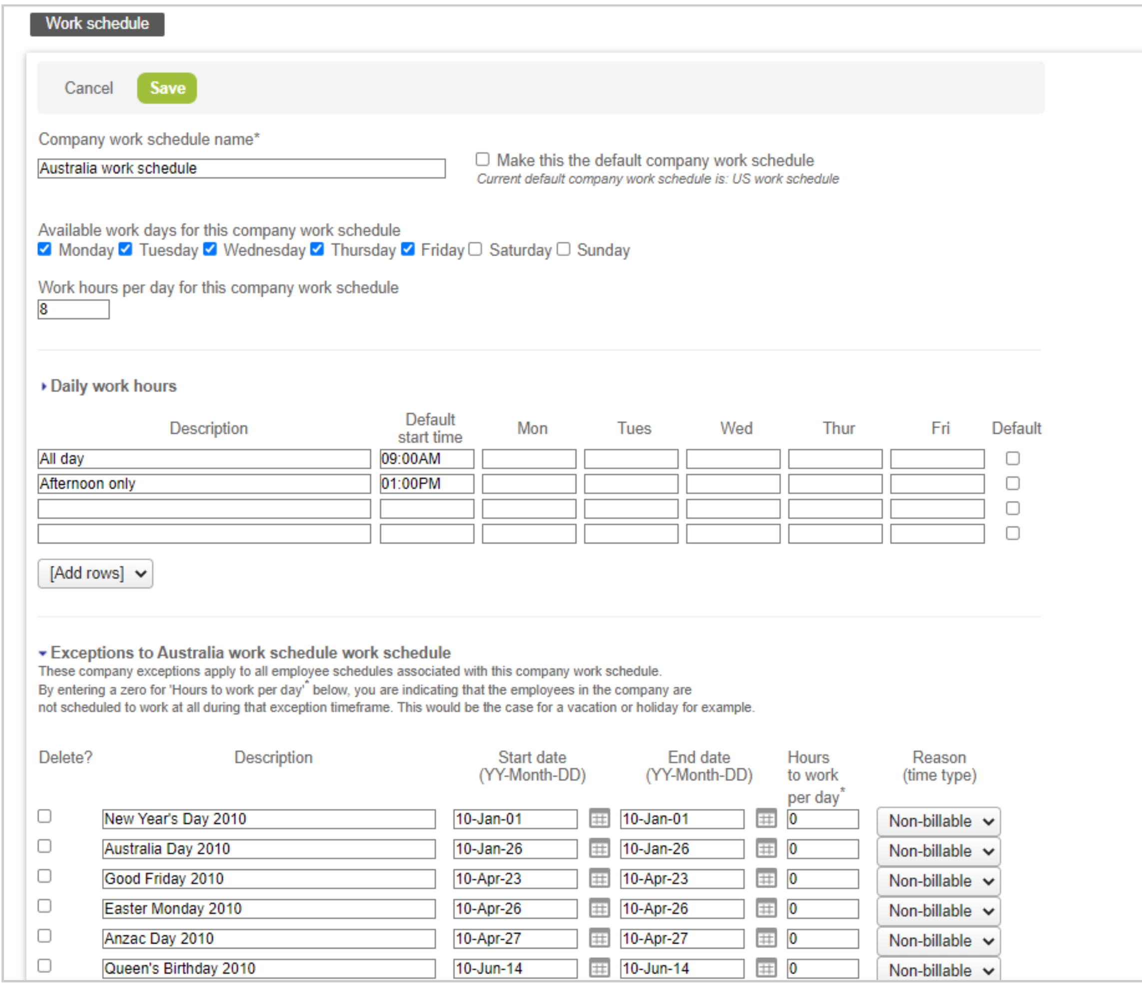
If work schedule time ranges are enabled, you can define start times for each day of the week. See Optional Features.

> **Note:** You need to enable work schedule time ranges and ensure that employees work schedules include start times to create bookings with start and end times for these employees, see Frequently Asked Questions (FAQs) under the Resources chapter.

You can also enter schedule exceptions for each work schedules. Work schedule exceptions can be created for public holidays, closure periods recognized or any other days, part-days or periods recognized by your company as non-working time. For each exception, enter a description, for example the name of the holiday, the start and end dates of the exception, and enter 0 hours for the work day definition.

Company work schedules can be associated with individual employees by setting the employee's **Schedule** link to the desired company schedule. Employees associated with the work schedule are not available for work on the days specified in the work schedule exceptions. If you have selected timesheet options to display schedule exceptions on the timesheet, then the company holidays entered on the work schedule are displayed on the employee's timesheet based on the schedule associated with the employee's account.

There are various configurations available on work schedules that allow for options such as a flexible-time schedule. Contact OpenAir Customer Support or OpenAir Professional Services to discuss these options.



Creating and Editing Company Work Schedules

You may create multiple calendars to define different work weeks.

To create or edit work schedules:

1. Go to Administration > Global Settings > Organization > Work schedules.
2. Do one of the following:

- Select a work schedule to edit it.
- Click the **Create** button then **New work schedule**.

The work schedule form appears.

3. If you are creating a new schedule, enter a **Company work schedule name**.
4. Check the **Make this the default company work schedule** box if you want this work schedule to be associated to all new employees by default.
5. Check the boxes for each working day of the week according to your company's work schedule.
6. Enter the **Work hours per day for this company work schedule**.
7. If work schedule time ranges are enabled for your account, you can define different set of **Daily work hours**. For each set:
   a. Enter either a **Default start time** or a start time for each working day of the week. The end time is set based on the number of hours for that day.
   b. Enter a **Description**.
   c. To make this set the default daily work hours for employees associated with the company work schedule, check the **Default** box.
8. Add any exceptions to the company work schedule. Exceptions can be used to enter public holidays and any period of company closure for example. These exceptions apply to all employee schedules associated with the company work schedule.
9. Click **Save**.

Frequently Asked Questions (FAQs)

How do I input my company holidays into the work schedule?

Company holidays and other days where all employees will not be working are entered under the Exceptions to Account workschedule work schedule section of the Work Schedule form. Remember, you can have multiple work schedules based on different countries, regions, states, etc. For each work schedule, enter the Description, which is the holiday name, Start date, End date, Hours to work per day (enter 0 if full day off, or other value depending on the situation), and select a Reason (time type) if these exist in your environment.

> **Note:** Always add the next year's holidays after the current year's entries. This will keep all calendars consistent with the appropriate exception data.

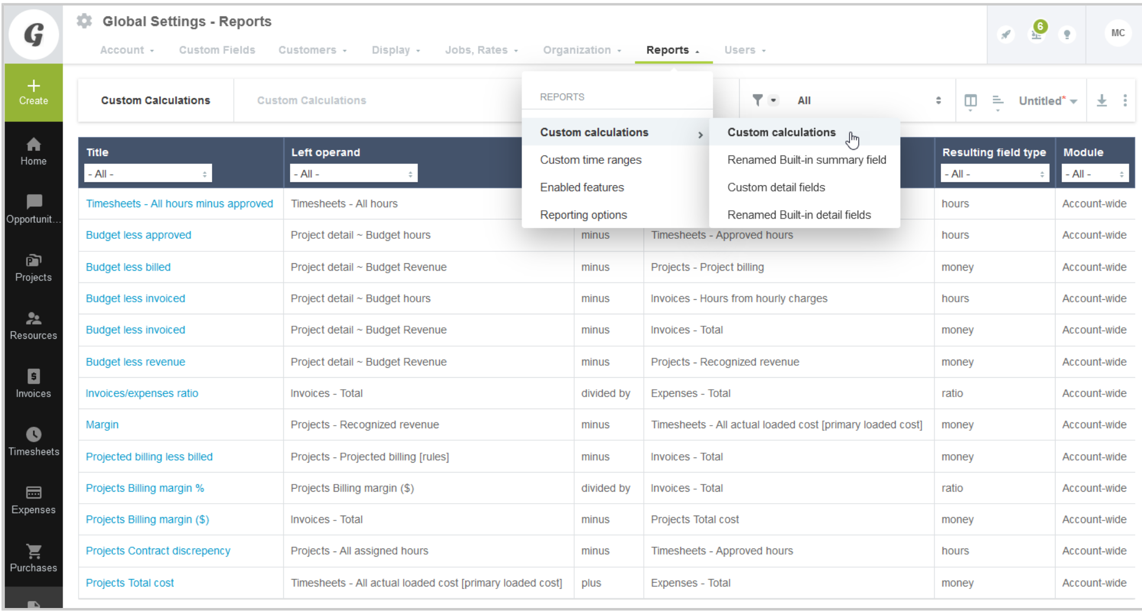
Reports

Links are provided to forms for the following settings and configurations. They are located in Administration > Global Settings under Reports. The following lists them in the order in which they display on the Global Settings window.

- Custom Calculations Overview
- Custom Time Ranges
- Enabled features
- Reporting Options

Custom Calculations Overview

OpenAir comes with several standard value fields, but you may find that there are other values you would like to track such as fields related to projects, employees, resources, and expenses to name a few. Or, there may be some standard value fields that you would like to rename for reporting purposes, using your company's terminology. OpenAir addresses your needs by allowing you to create custom calculated fields and renamed built-in fields.



To access Calculated Fields:

1. Go to Administration > Global Settings > Reports > Custom Calculations. Select the type of calculated field link you wish to use.
2. To view or modify an existing calculated field, select the appropriate field link under the Title column.
3. To add a new calculated field, select New and one of the options available in the drop-down list.

Refer to the following sections for more information.

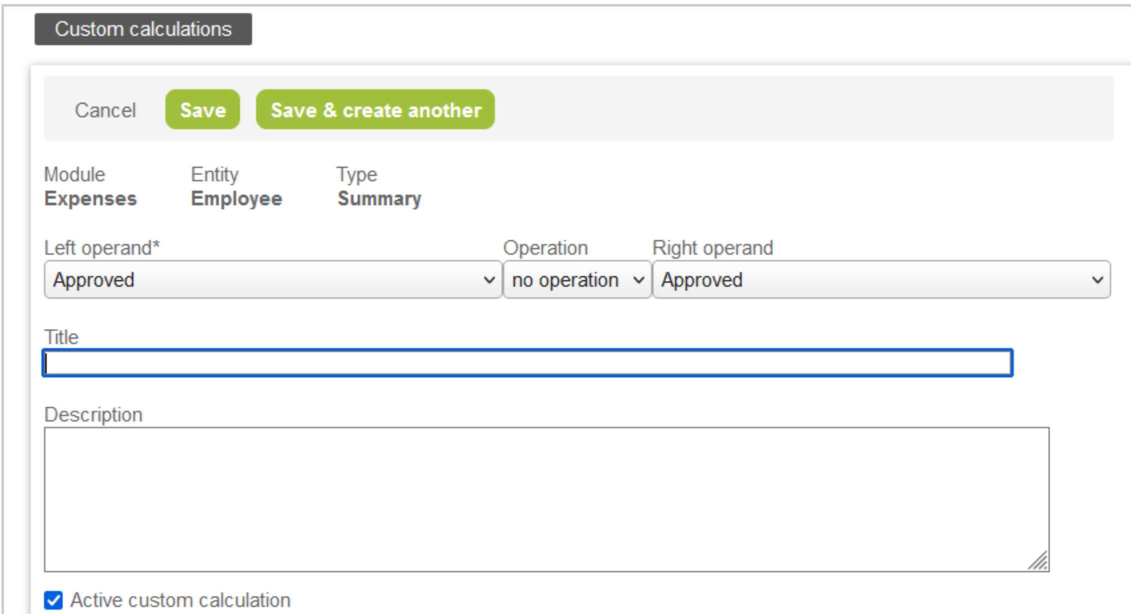
- Custom Calculations
- Custom Detail Fields
- Renamed Built-In Detail Fields
- Renamed Built-In Summary Fields

Custom Calculations

The Custom calculations option lets you define additional value fields for specific objects within OpenAir. Custom calculated field values are only displayed in Summary reports. When selecting what type of custom calculated field to make, the drop-down selection under the New menu corresponds to the type of summary report the calculation will be found in after it is made. For example, if you select an Account-wide project custom calculation, the resulting calculation can be found when you create a report from the account-wide projects section of summary reports. You are also able to use custom detail fields as constants in Custom calculations.

Calculated fields allow you to take two value fields and apply an operation on one from the other such as Expenses Approved minus Expenses Submitted. When a custom calculated field is created and associated with an object in OpenAir, it cannot be changed to another object. See Custom Calculations Overview.

When you create custom calculations, you need to decide on the main value you want to use in the custom calculation. For example, do you want to use money values related to Invoices or hours related to Timesheets, or both? This decision helps you determine whether you are choosing an Account-wide custom calculation or a application-specific custom calculation. The Account-wide selection provides the most flexibility in creating custom calculations. The entity determines where the value is stored in OpenAir.



To create a Custom calculation:

1. Go to Administration > Global Settings > Reports > Custom Calculations.
2. Select the custom calculation type from the **Create Button**.

   The New custom calculation form displays.
3. Next, decide on the Left operand, Operation and Right operand. Operation values include: plus, minus, times and divided by.
4. The Title is the name you provide for the custom calculated field. The custom calculated field title is automatically prepended with the entity name (e.g., Employee - Invoiced hours).

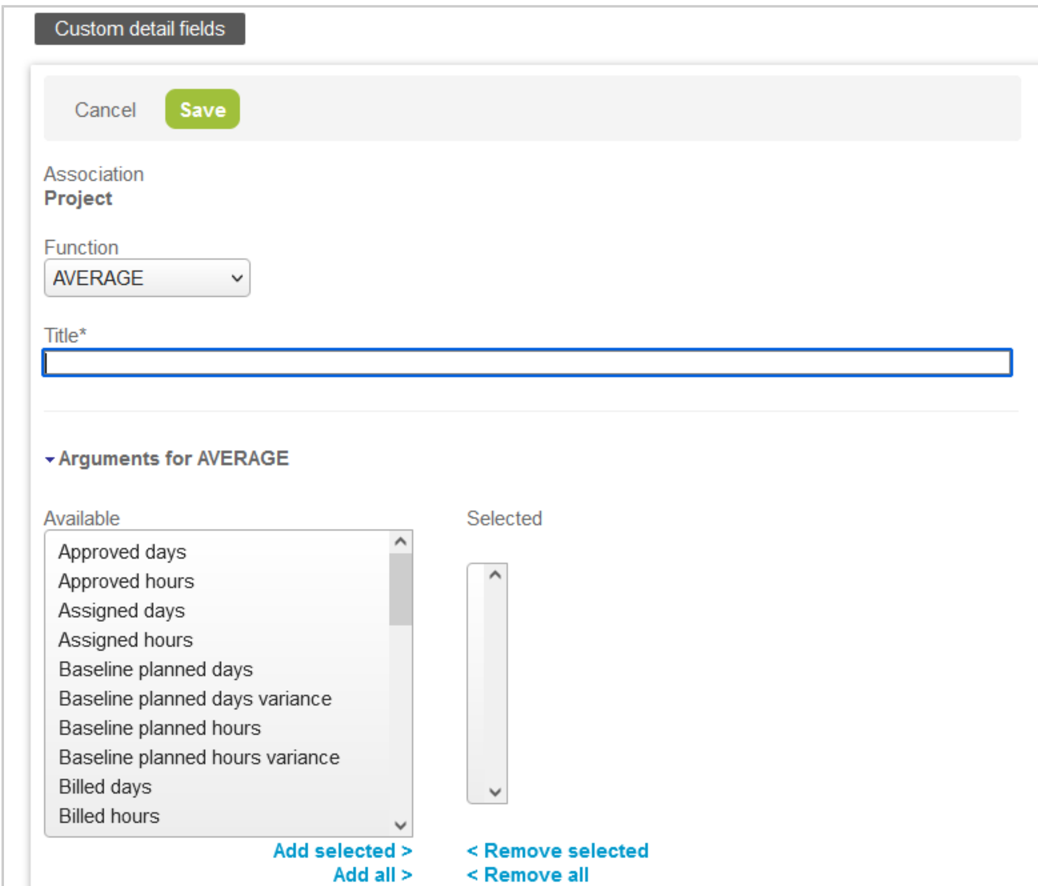
   > **Note:** The **Do not automatically prepend module name to title in account-wide report** box is only available when selecting Account-wide custom calculations. When checked, the entity name does not appear in the name of the custom field when selecting it as a value in the Summary reports.
5. A description may be added.
6. An **Active custom calculation** box is available.
7. Click Save.

Custom Detail Fields

The Custom detail fields option lets you define additional value fields for specific objects within OpenAir. You can display Custom detail field values in Detail reports.

Custom detail fields allow you to create a new value field from standard value fields within a particular application. When a custom detail field is created and associated with an object in OpenAir, it cannot be changed to another object. You can bring custom detail fields in as separate columns in summary reports.

You need to select the entity value you want to use from the New drop-down list. For example, are you creating a custom field based on the Project stage or Booking? The entity determines where the value is stored in OpenAir.



To create a Custom detail field:

1. Go to Administration > Global Settings > Reports > Custom Calculations.
2. Click the Custom detail fields link.
3. Select the new custom detail field type from the **Create Button**.

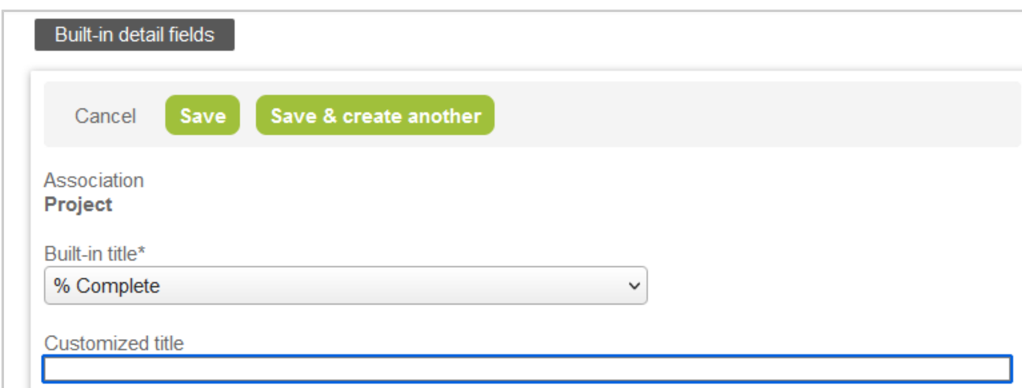
   The New custom detail field form displays.
4. Next, choose the Function. Function choices include: AVERAGE, CONCATENATION, CONSTANT, DATE_DIFF, DIFFERENCE and SUM. Not all function types are available for the various

application entities. For example, if the entity is a text field, your function choices are limited to CONCATENATION and DATE_DIFF.

5. The Title is the name you provide for the custom detail field.
6. Depending on the application entity chosen and the function, the form varies:
   - If the function is AVERAGE, an Available numeric area displays where you can select the numeric values to be used in the average and move them to the Selected numeric area.
   - If the CONCATENATION function is selected, a Text template area displays. You are able to add straight text and use standard field values. To select standard field values, choose the appropriate value from the Field drop-down list. Then copy and paste the value shown in the text box below the drop-down list into the Text template. It may be something like the following: %%approval_history%%
   - If the CONSTANT function is selected, you need to enter the value of the constant. The other argument for the constant function is the Resulting field type. Choices include: hours, days, quantity, and ratio. The constant custom detail fields can be used in custom calculations and in summary reports. This functionality is currently limited to transaction fields, such as Project billing transactions or Time entries.
   - If the DATE_DIFF function is chosen, the arguments area displays Date 1 minus Date 2. Both date fields are drop-down lists with the date fields available for the entity selected.
   - If the function chosen is DIFFERENCE, the arguments area displays Minuend minus Subtrahend. The minuend and subtrahend fields are drop-down lists that contain the numeric data values for the entity selected.
   - If the function is SUM, an available numeric area displays where you can select the numeric values to be used in the sum and move them to the Selected numeric area.

Renamed Built-In Detail Fields

OpenAir gives you the capability to Rename built-in detail fields for reporting purposes, using your company's terminology. You can also bring these Renamed built-in detail fields in as columns on summary reports.



To create a Renamed built-in detail fields:

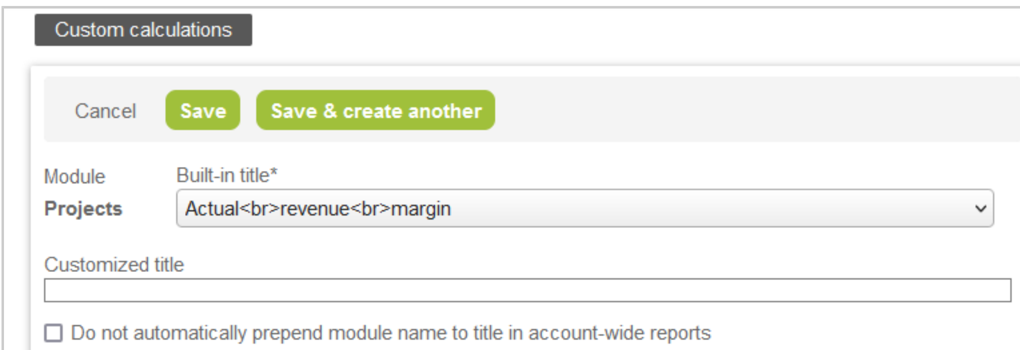
1. Go to Administration > Global Settings > Reports > Custom Calculations.
2. Click the Renamed Built-in detail fields link.
3. Select the standard field that you want to rename from the **Create Button**.

   The Rename built-in detail field form displays.

4. The Built-in title drop-down list provides a list of fields available to be renamed that are associated with the entity chosen.
5. After choosing the Built-in title field, enter the new Customized title. For example, Project owner may now be called Project Manager.
6. Under Summary Reports detailing options, if desired, select the check box to **Suppress Optional 'Summary Report' suffix**.
7. Click Save.

Renamed Built-In Summary Fields

OpenAir gives you the capability to Rename built-in summary fields for reporting purposes, using your company's terminology. You can use these Renamed built-in summary fields in Summary reports.

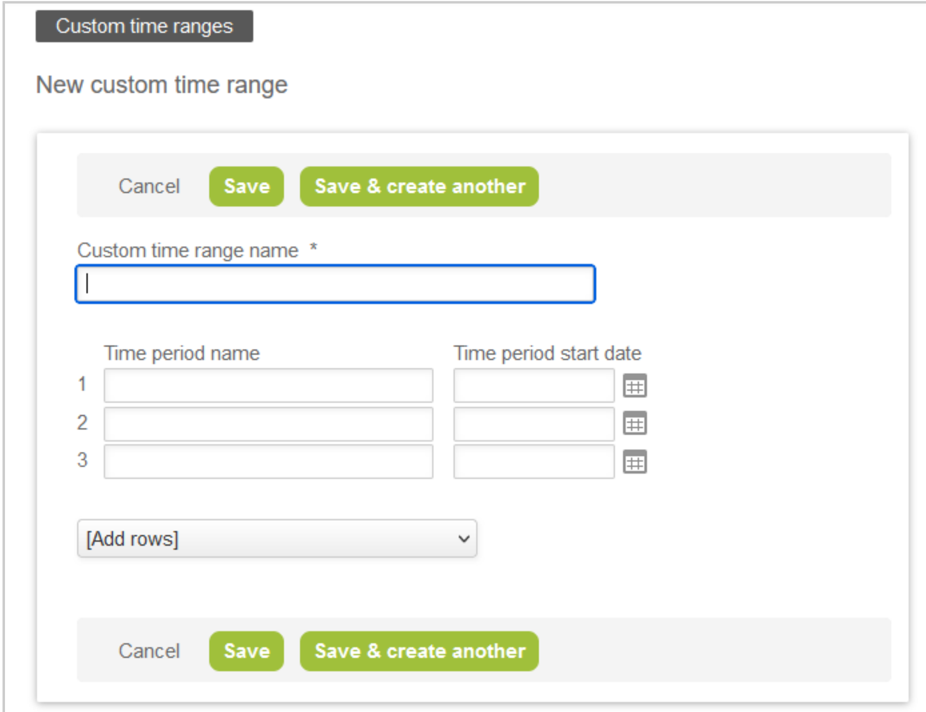


To create a Rename built-in summary fields:

1. Go to Administration > Global Settings > Reports > Custom Calculations.
2. Click Renamed Built-in summary fields.
3. Select the summary field that you want to rename from the **Create Button**.
4. The Built-in title drop-down provides a list of fields available to be renamed that are associated with the entity chosen. After choosing the Built-in title field, you enter the new Customized title. For example, you can change Project billing hours to Billed Hours.
5. Select the check box for: Do not automatically prepend application name to title in account-wide reports if you don't want the application name prepended to the title. If you do not select this check box, the calculated field displays in the value selection in summary reports with the application name before it. For example, it could read Timesheets - [NAME OF CALCULATION].
6. Click Save.

Custom Time Ranges

OpenAir lets you create custom time ranges to use in Summary reports and in Advanced resource reports and Invoice-Income received reports. Each report has a period field that sets the time range for the report. The OpenAir application comes with built-in time periods such as Weekly, Monthly, Annual, etc. Custom time ranges allow for custom periods to be created based on specific company needs (such as a 4-4-5 calendar). When created, they are available for use in time period specific reports. A typical use of custom time ranges is if you report upon a fiscal monthly period that does not coincide with calendar months.



To create Custom time ranges:

1. Go to Administration > Global Settings > Reports > Custom Time Ranges.
2. Select **New Custom time range** from the **Create Button**.
3. Enter the Custom time range name.
4. Next, add Time period names and Time period start dates. You must have at least two periods and dates, because the last date you enter is actually only used to calculate the end date of the previous period. The end date of each period is set to one day before the start date of the next period. If you do not name each time period, the name defaults to the start and end dates.
5. If you need to add more periods and dates, click Add Rows and select the number of rows to add.
6. Click Save.

Enabled features

The Enabled features view lists OpenAir features which can be enabled or disabled by account administrators for each OpenAir application or by OpenAir Customer Support at the account level.

The listed features can be one of the following types:

- **Application** — Application settings are controlled by account administrators in the OpenAir Administration module (Administration > Application Settings > [*Select an Application*] > Other Settings). These features are described in this guide. See the chapters describing each OpenAir application.
- **Internal** — Internal settings control the optional features which can be enabled for your account by OpenAir Customer Support. These features are described in the OpenAir Optional Features Book.

The view includes the following information for every listed feature:

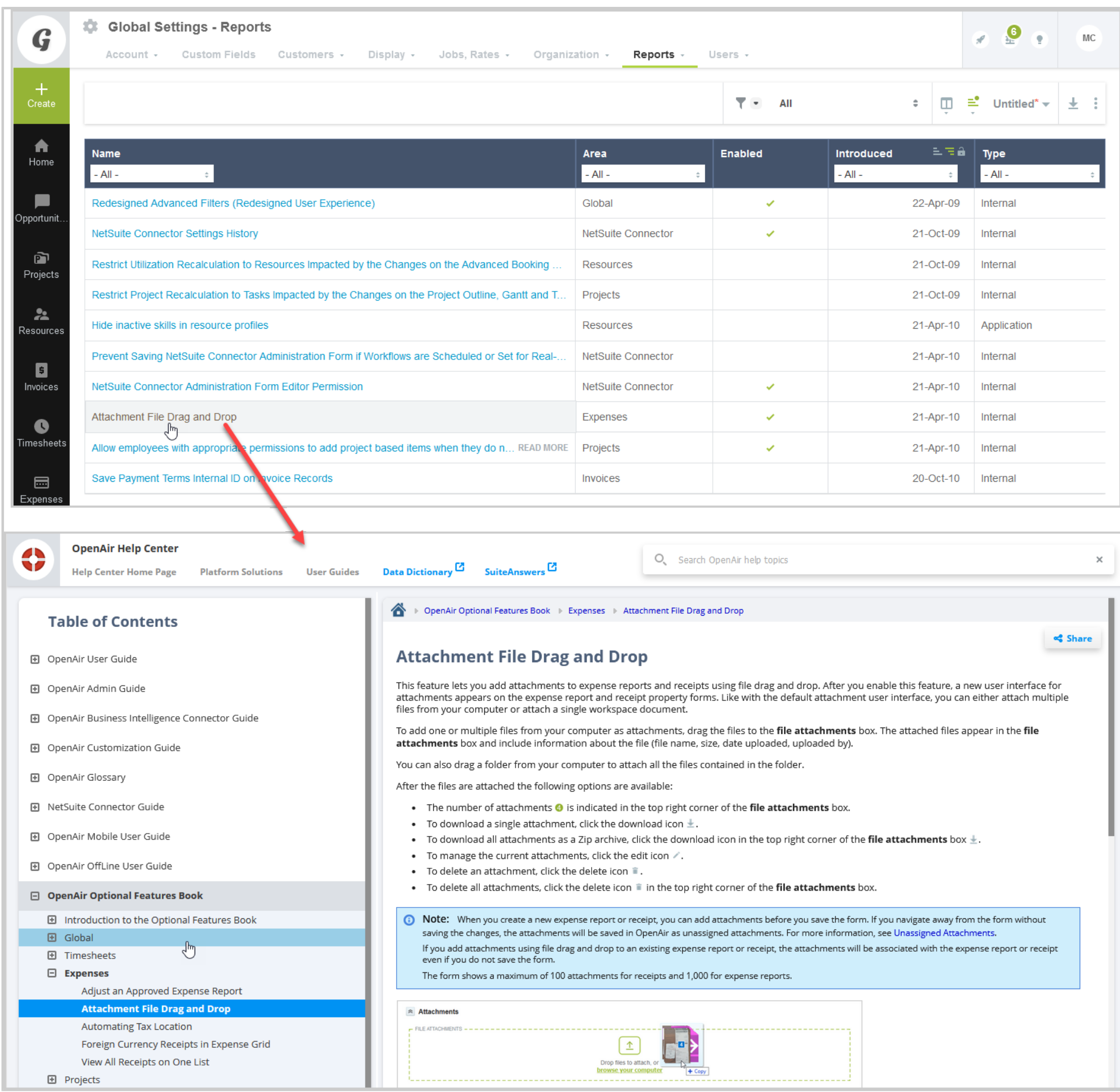
- **Name** of the feature — To read more about the feature, click the feature name. The OpenAir Help Center opens in a new browser window or tab and takes you directly to the relevant help topic.

- The OpenAir release date when the feature was **Introduced**.
- The **Area** indicates which OpenAir application the feature relates to or whether it is global feature.
- Whether the feature is **Enabled in account** (green square icon) or **Disabled in account** (red square icon). To read about requesting an optional feature to be enabled for your account, click **Disabled in account**. For Application settings, this link points to the help topic describing the feature.

> **Note:** Some optional features shown as **Enabled in account** require additional Administration settings. Click the feature name or refer to the OpenAir Optional Features Book for more information.

- The feature **Type** — Application or Internal.

> **Note:** You must be an administrator or have the **View Enabled Features** role permission to access the enabled features list.
>
> You must be an administrator or have the **View Help Center** role permission to click the links and access help topics describing the features.



To open the Enabled Feature’s View:

1. Go to Administration > Global Settings > Reports and click Enabled features.

To sort or filter the list of features:

1. Click the dropdown list under the column heading to sort or filter by and select an option.

To learn what a feature does:

1. Click on a feature’s name in the list view to open an OpenAir Help Center article briefly describing that feature.

   Note: This feature requires the **OpenAir Help Center** feature.

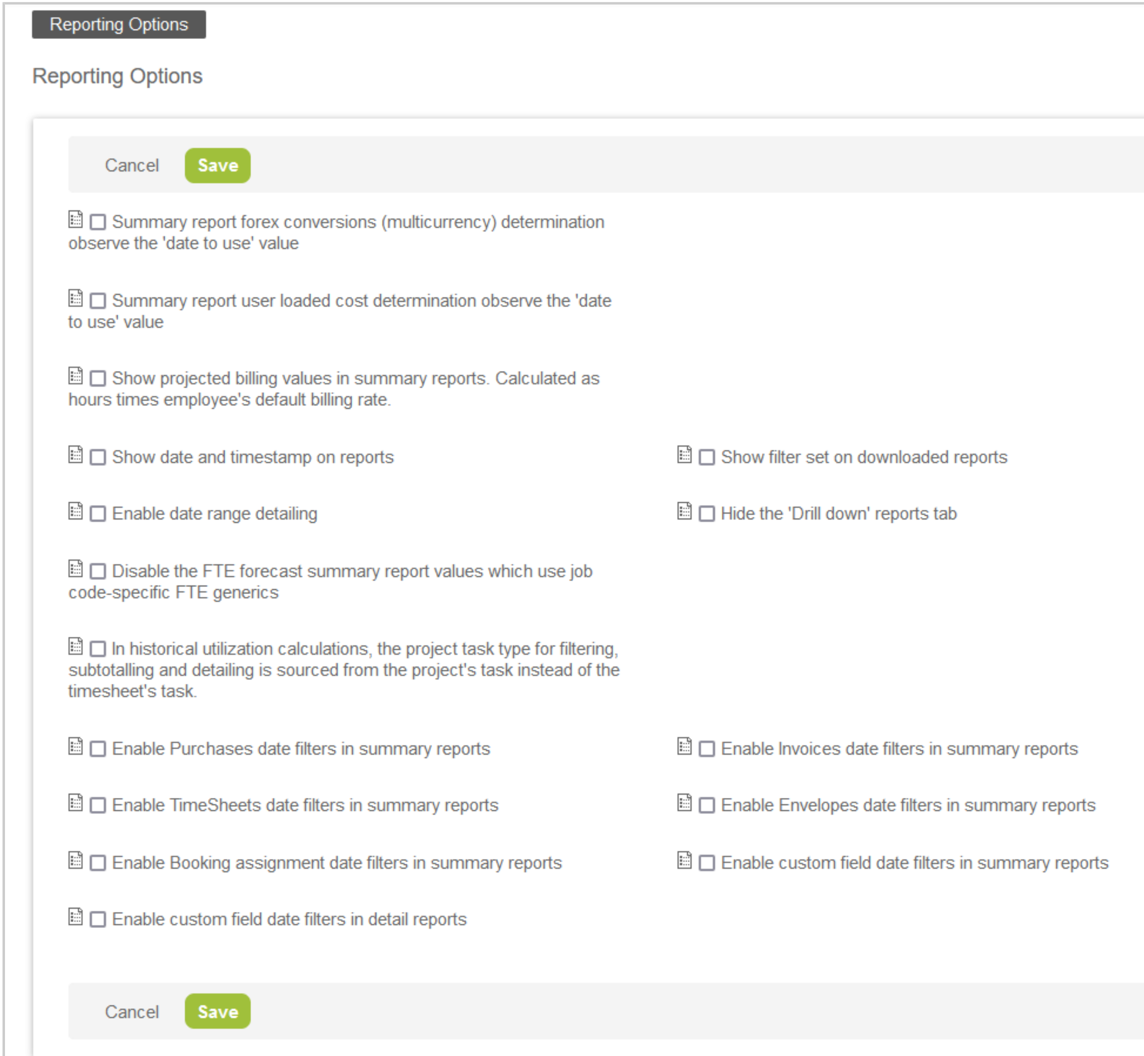
To learn how to request an account-level feature by opening a Support Case:

1. Click the “Enabled in account” or “Disabled in account” status message.

   Note: This feature requires the **OpenAir Help Center** feature.

Reporting Options

Reporting options settings provide system-wide controls on the appearance of OpenAir reports and functions available in the Reports application. The Reports application also contains an Options tab which has other settings that affect the appearance of reports. See Reporting Options.



To access the Reporting options:

1. Go to Administration > Global Settings > Reports > Reporting Options.

Summary report forex conversions (multicurrency) and employee loaded cost determination observe the 'date to use' value: Selecting this option enables the dates specified in the **date to use** drop-down lists in Summary reports to determine the correct rate to use in foreign currency conversions on a report. Employee-loaded costs in foreign currencies are also forced to use the rate found on the date to use date.

Summary report user loaded cost determination observe the 'date to use' value: Enable this setting to have loaded cost get its loaded_cost value from the 'date to use' setting. Without this feature, for accounts that leveraged the “Summary report forex conversions (multicurrency) and user loaded cost determination observe the ‘date to use’ value” feature, the date used applies to both the loaded cost report values as well as the forex conversions. The date selected will be used as the reference for when a report value uses a loaded cost value as well as report values that use forex conversions.

> **Note:** When this feature is enabled, users can choose to only apply the 'date to use" value to either the forex conversion or the loaded cost values.

Show projected billing values in summary reports. Calculated as hours times employee's default billing rate: Projects-projected billing fields if multi-currency are available in Summary reports. The hours used in the computation of the field are determined by the charge projection feature activated within the Project Application Options tab. The charge projection feature by default uses the defined hours as virtual timesheets and forecasts financials based on existing billing rules on the project. When you select this check box , it overrides the charge projection feature value by using the employee's hourly billing rate value instead of any rate defined on billing rules.

Show date and timestamp on reports: Checking this option displays a Generated on date timestamp at the bottom of each report.

Show filter set on downloaded reports: If you are using Filter sets to limit or narrow access to various data values, i.e., a set of customers or employees, this option displays the filter set on the report to clarify the content presented.

Enable date range detailing: Selecting this option enables new date ranges available within custom detail calculations using the Date_Diff function. When enabled, the Date_Diff function can use date ranges such as Today, Last week, and This Month. For example, a custom detail calculation field called Days to Completion would be calculated as Calculated finish date minus Today.

Hide the 'Drill down' reports tab: Drill down reports allow reporting with hierarchies and a drill down capability into the various levels of the defined hierarchy. If you are not using hierarchies, it is recommended to hide the drill down tab since no additional capabilities are available to report employees.

Disable the FTE forecast summary report values which use job code-specific FTE generics: The FTE forecast summary report calculates amounts based on the loaded cost for the Job code. If a generic resource is selected on the job code, costs are calculated on projects that have a generic resource assigned using the work schedule. Choosing this option prevents these costs from being calculated for generic resources and possibly skewing the data presented in the report.

In historical utilization calculations, the task type for filtering, subtotaling and detailing is sourced from the project's task instead of the timesheet's task: When calculating historical utilization, by default the Task type value is taken from the timesheet. If this option is selected, the current task type value from the task is used in the calculation instead of that from the timesheet.

Enable Purchase date filters on summary reports: Selecting this option provides a number of date filters to be available for Purchases data in the Summary reports form.

Enable Invoices date filters on summary reports: Selecting this option provides a number of date filters to be available for Invoices data in the Summary reports form.

Enable Timesheets date filters on summary reports: Selecting this option provides a number of date filters to be available for Timesheets data in the Summary reports form.

Enable Expense reports date filters on summary reports: Selecting this option provides a number of date filters to be available for Expense report data in the Summary reports form.

Enable custom field date filters on summary reports: Selecting this option provides a date filter for Custom date fields that you have created for your company to be available in the Summary reports form.

Enable custom field date filters on detail reports: Selecting this option provides a date filter for Custom date fields that you have created for your company to be available in the Detail reports form.

Users

You can add and manage OpenAir users and set up access control in the Administration > Global Settings > Users section.

Access to data and functionality in the OpenAir UI and add-on services is controlled at 3 levels:

- **Filter Sets —** A filter set is a defined access configuration that can be assigned to users. It controls what data –what projects or employees, for example– an employee can access. You should set up filter sets at a generic level and use the same filter sets for several employees based on what records these employees need to access to perform their job. Filter sets may overlay with roles to provide a matrix of capabilities for the employee. See Filter Sets Overview.
- **Roles —** A role is a defined access configuration that can be assigned to users. It controls access to functionality, primarily. You should set up roles at a generic level and use the same filter sets for several employees based on what these employees need to do to perform their job. Roles may overlay with filter sets to provide a matrix of capabilities for the employee. See Roles Overview.

  > **Note:** Form permissions can be used to restrict the form data users can view or modify according to their role. Account administrators can define specific field access on most forms in OpenAir to further refine the matrix of capabilities determined by the employee's role and the applied filter set. See Form Permissions.

- **User Privileges —** Capabilities may also be defined at the user-level on the employee record. See Employees Overview.

  This includes the ability to:

  - Access certain modules within the OpenAir UI or use certain add-on services. Application and exchange access control let you set up generic roles and then control access to specific modules. For example, the employee's role may grant the ability to create invoices, but may not have access to the Invoices module, which effectively cancels out the role permission to create invoices.
  - Perform certain actions or have access to information that should generally be available to designated employees. For example, permission to unapprove or unexport transaction records is controlled at the employee level on the Employee Demographic form rather than being granted by role. These permissions are sensitive and may impact data integrity in OpenAir and third-party software you integrate with OpenAir.

Users can fall into two broad categories:

- **Employees** — Your company employees, as well as the external consultants and subcontractors who deliver services on behalf of your company.
- **Guest Roles and Guests** — Guests are customers who are able to log into OpenAir and view the application data that is associated with them. See Guest Roles and Guests.

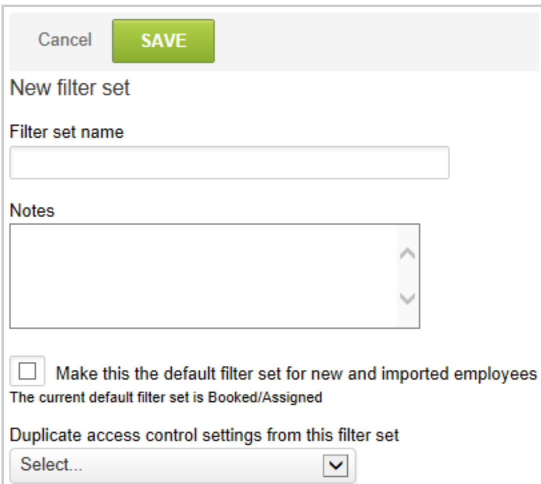
Employee locations allow you to store location attributes at the employee entity level, for reporting or segmentation purposes. Sample employee locations could be by state, by city, by country, or any customized list of values. See Employee Locations.

Filter Sets Overview

Filter sets define what data the employee has permission to view or update. The following entities are identified within the filter sets: Customers, Projects, Services, Employees, Expense Items, Charge stages, and Project stages. Roles and Filter Sets may overlay to provide a feature/data matrix of capabilities for the employee. By setting up appropriate Filter Sets, an administrator can provide multiple roles with access to the same record but can customize what users can see or do in those records.

Two filter sets are predefined for new accounts:

- All access — allows access to all data in yoiur OpenAir account
- Booked/Assigned — the default configuration of this filter set limits Employees access to the authenticated user only, and limits Project access to either Projects that are owned by the user or Projects that the user has been booked or assigned to.

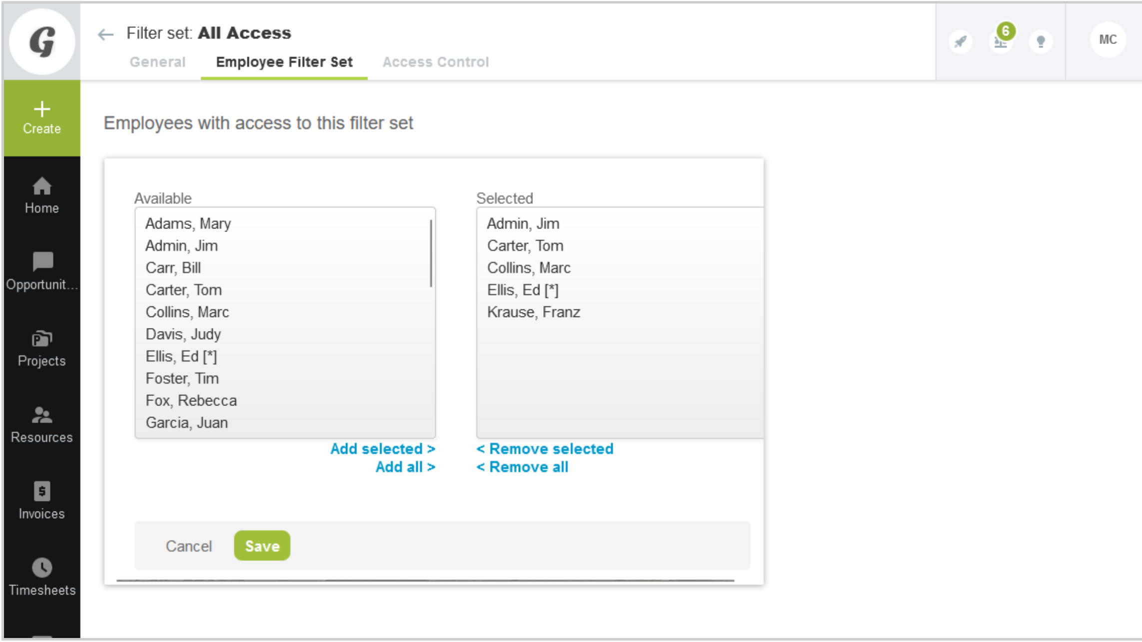


To create filter sets:

1. Go to Administration > Global Settings > Users > Filter Sets.
2. Click the Create button and select **New Filter set**. The New Filter Set form appears.
3. Enter the filter set name, Notes and check the Make this the default filter set for new and imported employees (if applicable).
4. Click Save.
5. After the filter set has been created and saved, additional options become available on the form, including the following links:
   - **General —** the Name and Notes about the filter set.
   - **Employee filter set —** identifies who has this filter set assigned to them in the filter set link of the employee record. See Employee Filter Set.
   - **Access Control—** identifies what types of data employees with this filter set can view. See Filter Set Access Control.

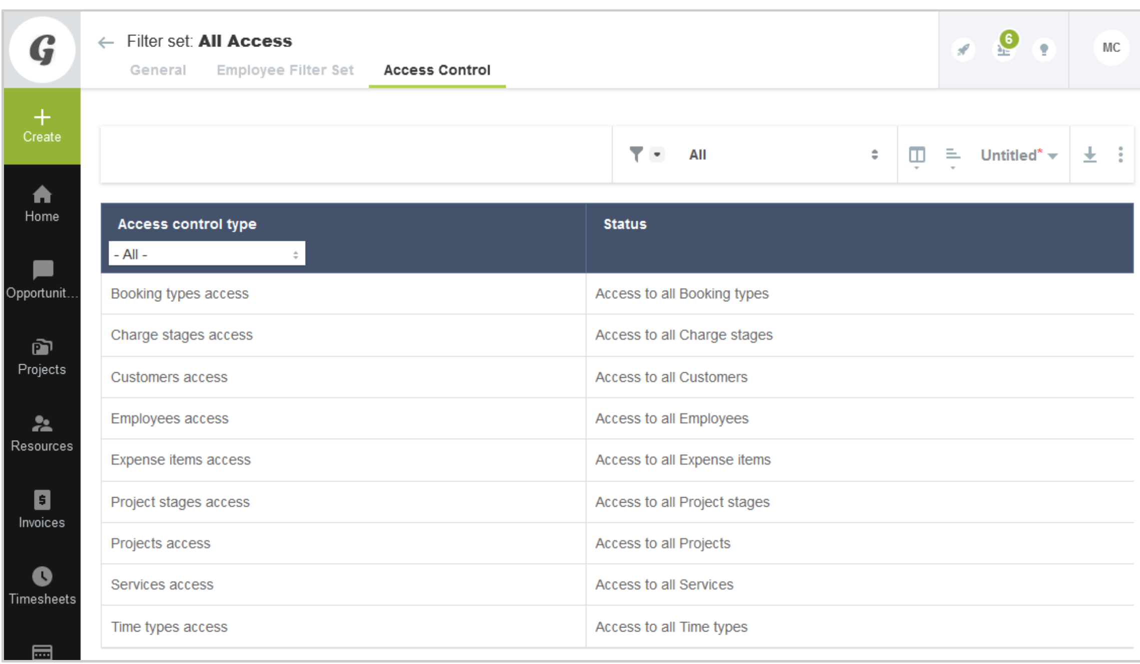
Employee Filter Set

After the filter set has been created, you can choose which employees will have this filter set available to be added to their employee record. It is added to the Filter sets link within the employee record. Employees with an asterisk (*) after their name cannot be removed from the assignment as this is their primary and only filter set. Employees must have at least one filter set assigned to their employee record. Employees with more than one filter set can switch filter sets to view different types of data.



Filter Set Access Control

Access Control defines the level of access that is granted to the assigned employees. Access Control can be set for the following entities: Customers, Projects, Project stages, Services, Employees, Expense Items, Charge stages, and Booking types. The filter sets provide the access relationship of those entities to a specific employee through discrete selections or with a meta value relationship description. For example, employees may have access to Project XYZ or to all projects they directly own.



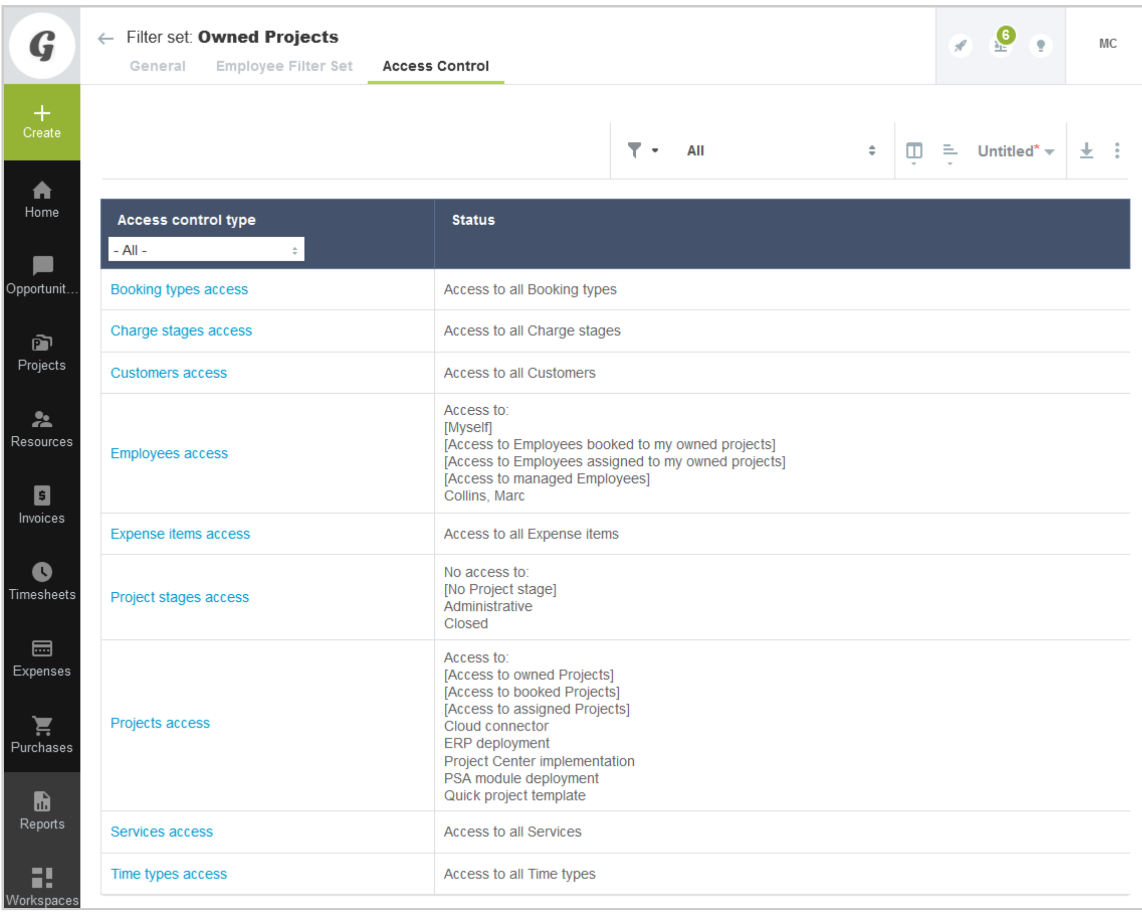
To view or modify the Access Control for a filter set:

1. Go to Administration > Global Settings > Users > Filter Sets.

2. Click a Filter set name to display the Filter set form.
3. Click the **Access Control** link.
4. To modify Access Control, click the Access control type you would like to modify for this filter set.
5. Include or exclude items by adding or removing the items from the Available or Selected areas, respectively.
6. Click **Save**.

Customer/Project/Project Stages

Filter sets can limit the view of customers, projects and project stages. For example, you could set a project manager filter set to be able to access only owned projects, booked projects, or assigned projects as well as only projects in a certain project stage.



Expense Items/Booking Types/Charge Stages

Filter Sets can limit the view of Expense Items, Booking Types and Charge Stages. For example, you could prevent an employee from accessing the Miscellaneous Expenses item or the Overage charge stage by modifying the filter sets.

Employees/Services/Time Types

Filter sets can limit the view of employees, services, and time types. For example, you could set an employee filter set to be able to access only their own timesheets or choose only internal time types on their timesheet.

Filter Sets Options at the Employee Level

See also Filters Hierarchy Overview.

Switching Filter Sets

If an employee has been assigned more than one filter set, the employee can select which filter set is currently active by using either of the following paths, depending on their Employee setup configuration.

To select a filter set as active:

1. Go to User Center > Change filter set to display the list of available filter sets. Click **Choose** on one of the rows to set that filter set as your active filter set for the current session.
2. Go to Employees and select the Employee ID. On the Employee Demographic form, scroll down the Primary filter set field and select the desired value.

> **Note:** This is only available if the Employee has been assigned more than one filter set.

Primary Filter Sets Application Overrides

To assign multiple filter sets at the Employee level:

1. Go to Employees and select the Employee ID. On the Employee Demographic form, scroll down the Filter set module overrides. Use the create or edit link to add or remove filter sets for the employee record.

> **Note:** If you are using the Filter set module overrides, changing the primary/active filter set does not impact the application overrides, unless the override setting is Active filter set.

Frequently Asked Questions (FAQs)

Why would an employee have more than one filter set assigned to them?

There may be instances where an employee is playing two or more role in the company. For example, a manager may be primarily responsible for the Eastern Region. But due to a vacancy in the company, they may also need to take over the responsibility for the Central Region. Using filter sets would allow the manager to view each of the regions individually. Remember that filter sets determine what data the employee has access to in your OpenAir account.

Administrators and users with a "All Access " filter set can experience slow performance in accounts with large amounts of data, especially when loading lists. Assigning multiple filter sets allows these users to change the active filter set to view only the data they need. List views will load quicker if the filter set combination returns significantly less data than the "All Access" option.

Can I delete a filter set?

You cannot delete a filter set if there are employees assigned to it. To delete a filter set, you must remove all assigned employees first. You can run a detail report for the filter set which can show what employees are assigned to it. You can delete the filter set when no employees are assigned to it.

When considering the Access Control in filter sets, you should consider using the meta value relationships as much as possible. The values provided in employee and project access are the discrete lists of all the employees and projects in your OpenAir account, which can be cumbersome to manage.

For example, employee access for managers would typically need to see their direct reports. If you assign the meta value **[Access to Managed Employees]**, it automatically lets the employee see all direct reports who have that employee as their manager in your OpenAir account.

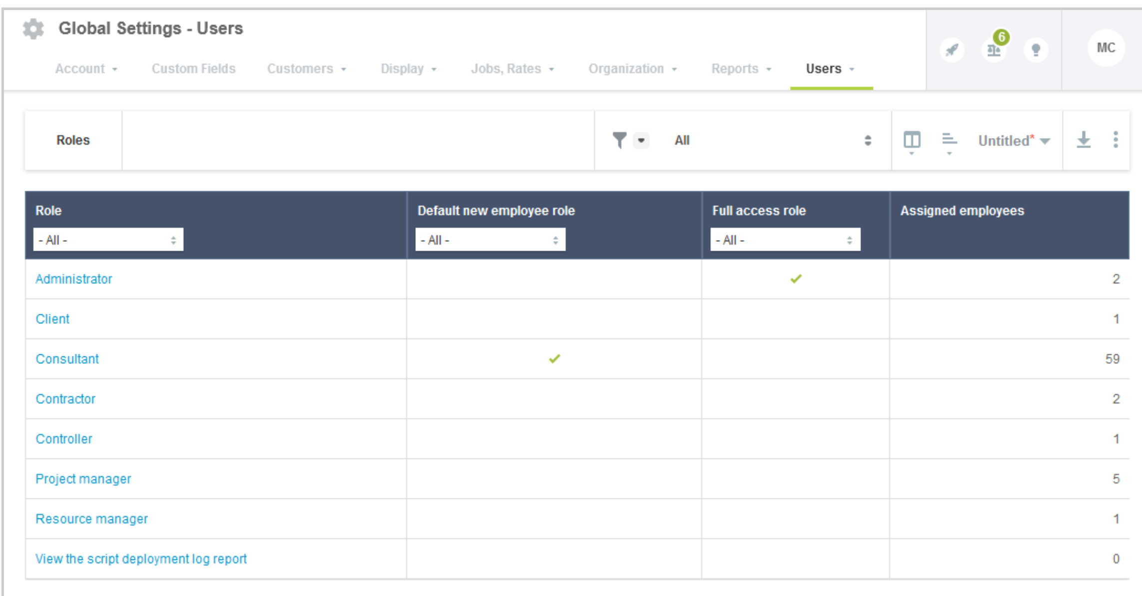
Roles Overview

Roles within OpenAir define what an employee can do in your OpenAir account. The role setup designates what rights and privileges are available to employees with a specific role. This includes what applications the employee can access as well as whether they can view, modify, or create various records within OpenAir. For example, you may create a Project Manager role which lets project managers modify projects but does not allow them to change the project stage.

Employees are assigned the default role when created. An employee must have a role assigned to them and can be assigned to only one role . You can change the employee’s role at any time in the Employee Demographic form.

You can create or edit and grant or revoke rights and privileges for general and application-based entities and items. There are separate sections for General Settings, My Account, Workspaces, Opportunities, Resources, Projects, Timesheets, Expenses, Purchases, Invoices, Integration, Proxy restrictions, and Scripting. See Role Permissions.

You can also create Guest roles to give customers a restricted access to OpenAir and enable to view only relevant project information. See Guest Roles and Guests



Predefined Roles

There are two predefined Roles within the application:

- **Administrator role —** cannot be modified. The Administrator's primary OpenAir usage is maintaining your account configuration, adjusting for company needs, data audits, report creation, release management, process enforcement, and general administration.
- **Employee role —** can be modified as needed. Typically, the Employee role has few rights and privileges.

Typical Custom Roles

Here are some examples of typical roles that you may want to create:

Employee (default) — Primary OpenAir usage is time and expense entry. There is no edit or create capability on any other object within OpenAir.

Project manager — Primary OpenAir usage is budget and schedule management of projects. This may include project creation, financial review (no create-edit access to financial data), and resource management permissions (submit booking requests, create bookings, etc.).

Finance — Primary OpenAir usage is invoicing and billing-revenue financial management of projects. It also may include project setup and customer setup.

Human Resources — Primary OpenAir usage is employee maintenance as well as vacation and sick time (HR benefits) reporting. Typically, employees with this role can also create and edit employees as well as view all timesheets and expense reports in OpenAir.

Project Administrator — Primary OpenAir usage is project setup, including billing and recognition rules, and customer creation. This role does not usually have invoicing capability or the ability to create or edit financial information regarding billing and revenue.

Resource Manager — Primary OpenAir usage is for resource bookings and the management of resource schedules. This may also include project and task assignments within the Projects application.

Super Employee — Primary OpenAir usage is managing localized account configuration items such as invoice layouts, employee maintenance, and company calendars. This role has limited impact to global account configuration changes, although shares some account administration responsibilities.

To create a new role:

1. Go to Administration > Global Settings > Users > Roles.
2. Click the **Create Button** and select **New Role**. The New Role form appears.
3. Enter the Role name.
4. Check the **Make this the default role for new and imported employees** box to assign this role to all new and imported employees by default.
5. Check the boxes for all permissions you want to grant employees with this role. The role form contains sections covering the permissions for the functional areas and applications within OpenAir. See Role Permissions.

To edit an existing role:

1. Go to Administration > Global Settings > Users > Roles.
2. Click the role you want to edit. The Edit Role form appears.
3. Check the **Make this the default role for new and imported employees** box to assign this role to all new and imported employees by default.
4. Check the boxes for all permissions you want to grant employees with this role. The role form contains sections covering the permissions for the functional areas and applications within OpenAir. See Role Permissions.

To assign a role to an employee:

1. Go to Administration > Global Settings > Users > Employees.

2. Click on the Employee ID for the employee whose role you want to change. The Employee Demographic form opens.
3. Click on the **Role** dropdown at the top of the form, next to the Employee ID, and select the employee's role.
4. Click **Save**.

Tip: You can use the bulk employee change wizard to copy the Role to other user records in your OpenAir account.

See OpenAir Administrator Guide under Home > Home > Wizards > Making Changes to Multiple Employee Records at the Same Time.

Role Permissions

The role form contains sections covering the permissions for the functional areas and applications within OpenAir.

Roles - General Settings

The General Settings section lets you specify general role permissions. For example: View Customers, View and modify Customers, and View and Modify Customers (except name). In this example, by selecting View and Modify Customers, View Customers is included and does NOT need to be checked. You can select the check boxes to turn options **on** or **off** based on the role requirements.

Most of the following options include either simply View or View and modify: Customers, Customer locations, Prospects, Contacts, Projects, Employees, Generic employees, Departments, Attribute sets, Roles, Services, Service 1 lines, Payroll types, Expense items, Vehicles, Approval processes, Vendors, Employee costs, Loaded costs, Generic employee costs, Employee job codes, Generic resource job codes, Filter sets, Custom time ranges, Account-wide reports, Employee login detail report, Auto-billing rules, Hierarchies, Tax locations, Job codes, Rate cards, Cost centers, External IDs, Snap shots, Calendars for others, Audit trails, Internal IDs, Dashboard graphs, Email templates, Calculated fields, Built in summary fields, Tag groups, Target utilization, Download lists, Download reports.

Also within the General Settings section are the following role options:

- **View and modify existing employees —** lets employees with this role view and update existing employees in OpenAir. This is useful for roles that may need to modify employees but who should not have the ability to create new employees.
- **See billing rates and budget amounts —** This is useful for project managers or others so that they are aware of project financial information.
- **Customize forms and/or Customize lists —** Customize forms option permits employees to modify certain forms within the application such as Receipts or the Timesheet. You, as the account administrator, are generally the employee who customizes forms, although some companies also use a super employee account. Customize lists permits employees to change the order and selection of fields in the list view (e.g., Projects or Employees).
- **Restrict data viewed on reports —** Share saved reports with other employees, Specify report usage designations, and Specify report filter sets.
- **Download lists and reports into Microsoft Excel or PDF files —** Download lists and Download reports.
- **Employee Unlock —** Allow employees to unlock the account of other employees who have failed the security requirements set for your OpenAir environment. Many companies restrict this option to you, the account administrator, and to a backup employee for times when you are unavailable.

- **View and modify all list views —** Enables users to access and manage all saved list view configurations in an account from the Administration module or from within list views. This features requires the following internal switch to be enabled: Saving list view configurations. To enable this internal switch, Creating a Support Case.
- **Change owner on list views —** Enables users to change the owner for saved list view configurations they have access to. This features requires the following internal switch to be enabled: Saving list view configurations. To enable this internal switch, Creating a Support Case.

Roles - My Account

Options in the My Account section relate to Administration > Global Settings. You can select the check boxes to turn options **on** or **off** based on the role requirements. However, we recommend that most of these options be limited to account administrators.

The View and Modify options include: Dashboard, Company demographics, Company schedules, Company logos, Company settings, Terminology, Custom fields, Currency rates, Base currencies, My charges, Automated back-up service, Company status on dashboard, and Employee status on dashboard.

Also within the My Account section are the following role options:

- **Exchange information —** Import Customers from outside sources as well as Export data to other applications including Microsoft Excel.
- **Use of the following wizards —** Bulk employee change wizard, Expense report attachment wizard, American Express receipt import wizard, and Bulk task change wizard. The wizards allow you to make bulk changes to certain aspects of related records. For example, if you were going to change the department across a large set of employees, you would use the Bulk employee change wizard.
- **Administration —** Perform company maintenance functions and Create own proxies.

Roles - Expenses

Options in the Expenses section relate to the Expenses application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Expense report alerts, Payment types, Expense reports, expense report layout, expense grid, reports, authorizations, and expense report reimbursements.

Also within the Expenses section are the following role options:

- **Create charges from approved expense reports —** This option permits charges to be created after an expense report has been approved. You must have enabled the following internal switch: Automatically bill expense items assigned to a customer when an Expense report is approved. To enable this internal switch, Creating a Support Case.
- **Book approved authorizations —** This option permits employees to book (i.e., create a financial transaction) for the item when the authorization is approved in OpenAir.
- **Allow employee to delete (individually or in bulk) open, submitted or rejected envelopes —** This option permits employees to delete any open, submitted or rejected expense reports either individually or in bulk. This features requires the following internal switch to be enabled: Administrators can delete employees envelope. To enable this internal switch, Creating a Support Case.

Roles - Timesheets

Options in the Timesheets section relate to the Timesheet application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply

View or View and modify: Time types, Timesheet alerts, Ceridian payroll integration, Approved timesheets, Archived timesheets, Time off requests, Timebills from approved timesheets, Timesheet layout and rules, Reports, Adjust approved timesheets, Leave accrual transactions, Accrual rules, Run leave accrual, and View the time entry tab.

Also within the Timesheets section are the following role options:

- **Create charges from approved timesheets —** This option permits charges to be created after a timesheet has been approved. You must have enabled the following internal switch: Automatically bill time assigned to a customer when a timesheet is approved. To enable this internal switch, Creating a Support Case.

> **Note:** Most customers use Billing Rules to generate charges. If you use Billing Rules, this role permission is not applicable.

- **Run leave accrual —** This option permits employees to run the leave accrual and update leave balances. We recommend that you limit this option to account administrators and run leave accrual at a specified day and time.
- **Allow employee to delete (individually or in bulk) open, submitted or rejected timesheets —** This option permits employees to delete any open, submitted or rejected timesheets either individually or in bulk. This features requires the following internal switch to be enabled: Administrators can delete employees timesheets. To enable this internal switch, Creating a Support Case.

Roles - Projects

Options in the Projects section relate to the Projects application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Dashboards, Project locations, Tasks and Phases, Task types, Gantt chart layout, Reports, Project analysis, Project overview, Recognition rules, Transfers, Task cost and Billing projections, Project stages, Assignment groups, Project pricing, Baselines, Booking grid, Project alerts, Issues, Issue statuses, Issue severities, Issue sources, Issue stages, Budgets, and Unlock projects (locked by OpenAir project connector).

Also within the Projects section are the following role options:

- Hide the profitability section in the project overview.
- Create and modify project billing rules and Run project billing. We recommend you limit these options to roles of employees who control the financial aspects of projects.
- Change the project stage of a project. This option can be useful when the employee who manages a project is not the one to change the stage of the project.
- Enable the advanced booking worksheet functionality.

Roles - Workspaces

The options in the Workspace section relate to the Workspace application. You can select the check boxes to turn options **on** or **off** based on the role requirements. The options include: create, view, and modify workspaces, view account storage usage, view and modify document categories; copy, move and download documents; view reports; and view and modify workspace alerts.

Roles - Invoices

Options in the Invoices section relate to the Invoices application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply

View or View and modify: Charges, Invoices, Invoice payments, Invoice layouts, Reports, Charge stages, Agreements, and Customer POs, and Change the customer PO of a charge.

Also within the Invoices section are the following role options:

- **Change the charge stage of a charge —** This option permits employees to change the charge stage of a previously created charge (timebill). We recommend this option be restricted to those personnel with billing responsibilities.
- **Change the agreement of a charge and Change the customer PO of a charge —** This option permits employees to adjust the agreement or customer PO on a charge in OpenAir. We recommend this option be restricted to those personnel with billing responsibilities.

Roles - Resources

Options in the Resources section relate to the Resources application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Skills, Booking types, Industries, Job roles, Locations, Education, Custom profiles (1-35), Profiles, Bookings, Booking grid, Booking requests, Deal booking requests, Customer engagement history, Reports, Resource options, Optional resource detail in Custom search and quick search, and Resource alerts.

Also within the Resources section are the following role options:

- **Enable profile worksheet —** This option permits employees to modify a profile. When enabled, a **Worksheet** link displays in the Resources application for any resource that the employee has access to through their Filter Sets.
- **Create bookings** and **Customize the form used to create multiple bookings —** These options allow employees to schedule a resource on a project. We recommend that you restrict this option to those in a resource or project management function within your company to avoid resource scheduling conflicts. OpenAir lets you book multiple resources at the same time as well as to customize this form to meet your needs.
- **Create booking requests** and **Create deal booking requests —** These options allow employees to request resource bookings for projects or on deals in the Opportunities application is available.
- **Customize the Custom Search form —** This option permits employees to customize the Custom Search form to include or exclude skills, education, custom profiles in the custom search. See Search - Resources Application and Custom Search.

Roles - Purchases

Options in the Purchases section relate to the Purchases application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Manufacturers, Purchasers, Carriers, Accounts payable locations, Receiving locations, Products, Shipping terms, Payment terms, Purchase requests, POs, Quick PO items, Fulfillments, PO layout, Reports, Reduce purchase item quantity payable, and F.O.B. locations.

Also within the Purchases section are the following role options:

- **Create POs —** This option permits employees to create purchase orders directly without having to submit a purchase order request.
- **Create and modify non-PO purchase items —** This option permits an employee to create or modify purchase items that have not been previously identified as Products within OpenAir on purchase orders.
- **Create fulfillments —** This option permits employees to record fulfillments against purchase orders within OpenAir.

- **Can reduce purchase item quantity payable —** This option permits employees to adjust the quantity to be paid on a PO within OpenAir.

Roles - Opportunities

Options in the Opportunities section relate to the Opportunities application. You can select the check boxes to turn options **on** or **off** based on the role requirements. Most of the following options include either simply View or View and modify: Create, view, and modify Deals; Estimates; Proposals; To Dos; Events; Territories; Employee locations; Business types; Customer sources; Customer sizes; Templates; Proposal layout; Reports; and Deal stages.

Also within the Opportunities section are the following role options:

- **Assignments —** Assign to dos to all employees, Assign events to all employees, and Assign deals to all employees
- **Create charges from accepted proposals —** This option permits employees to convert charges to time entries when a customer or prospect has accepted the proposal. If this is a Prospect, the prospect must be converted to a customer in order for the charges to be billable.
- Change the deal stage of a deal

Roles - Proxy Restrictions

Options in the Proxy Restrictions relate to proxy permissions. You can select the check boxes to turn options **on** or **off** based on the role requirements. Proxy permissions allow an employee to proxy or, in other words, log-in as another employee and perform actions within OpenAir as that employee. OpenAir can distinguish between a direct login and a login done via proxy. In addition OpenAir can distinguish the actions performed directly within a particular account and one done by a proxy.

Proxy restrictions under the **Roles settings** restrict what a proxied-in employee can do. Examples of proxy restrictions include: A proxy employee cannot approve timesheets, A proxy employee cannot approve their own timesheets, A proxy employee cannot approve booking requests, or A proxy employee cannot approve invoices.

Roles - Integration

Options in the Integration section relate to QuickBooks, which is used in the OpenAir Integration Manager. Select this check box when the following is desired: Elevate to full admin privileges for QuickBooks integration.

> **Important:** As announced in the October 8, 2022 OpenAir Release Notes and through Proactive Feature Change Notification (PFCN), OpenAir will end support for the OpenAir Integration Manager QuickBooks integration functionality effective April 2023 with the OpenAir 2023.1 Release.
>
> You should replace any usage of the OpenAir QuickBooks integration functionality with an alternative connector, the OpenAir XML API or SOAP API, or the OpenAir Integration Manager CSV import/export functionality by April 2023.

There are a variety of integrations with OpenAir. Employees can download some of them from your OpenAir account under Add-on services. As an account administrator, you provide an employee with Exchange Access. See the help topic Access Control.

Other integrations are enabled through an internal switch. You may need to discuss integration availability with your OpenAir account manager or OpenAir Professional Services. As an account administrator, when an integration is enabled, you generally provide employees access to it. You may want to speak with OpenAir Professional Services to understand other integration options and how to implement them in your company's account. See Account.

Guest Roles and Guests

You can provide guest access to your customers if you want to share some project information with them such as project Gantt charts, project outlines, or invoices, for example. Guests are customers who are able to log into OpenAir and view the application data that is associated with them.

Guests are stored as Employees in the OpenAir database. The Demographic form for guests is similar to the Demographic form for employees — many of the fields and settings are the same. However, guests must be assigned a guest role. You will need to create a guest role before you can add a guest user. You must also select the appropriate Customer in the **Employee is this Customer** dropdown when adding a guest user.

Guest role settings include the following: Guest can view Project Gantt charts, Guest can view Project outlines, Guest can view task details in Gantt/outline views, Guest can view Invoices, Guest can view Workspaces, and Guest can customize lists.

To create a guest role:

1. Go to Administration > Global Settings > Users > Guest Roles.
2. Click the **Create Button** and select **New Guest role**. The New Guest Role form appears.
3. Enter the **Role** name. Check the boxes for all permissions you want to grant guest users with this role.
4. Enter any **Notes**, if desired.
5. Click **Save**.

To add a guest user:

1. Go to Administration > Global Settings > Users > Guests.
2. Click the **Create Button** and select **New Guest**. The New Guest form appears.
3. Enter the Employee ID. Select a role and a customer from the **Role** and **Employee is this Customer** dropdowns, respectively.
4. Enter and confirm a password for the user. Check the **Force a password change** box to ensure the guest user changes password when logging in to OpenAir for the first time.
5. Click **Save**.
6. Go to the **Filter sets** tab.
7. Select any applicable filter sets.
8. Click **Save**.

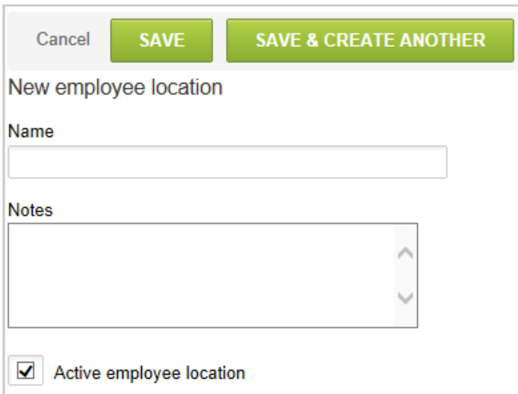
> **Note:** You need to create at least one guest role before you can add a guest user. You will not be able to save the New Guest form if you are not able to assign a role to the user.

Employee Locations

Employee locations allow you to store location attributes at the employee entity level. These attributes can then be reported on. Sample employee locations could be by state, by city, by country, or any customized list of values.

To create Employee locations:

1. Go to Administration > Global Settings > Users > Employee Locations.
2. Select **New Employee location** from the **Create Button**.
3. Enter the **Name** of the employee location along with any **Notes**, if applicable.
4. Check the **Active employee location** box.
5. Click **Save**.



Employees Overview

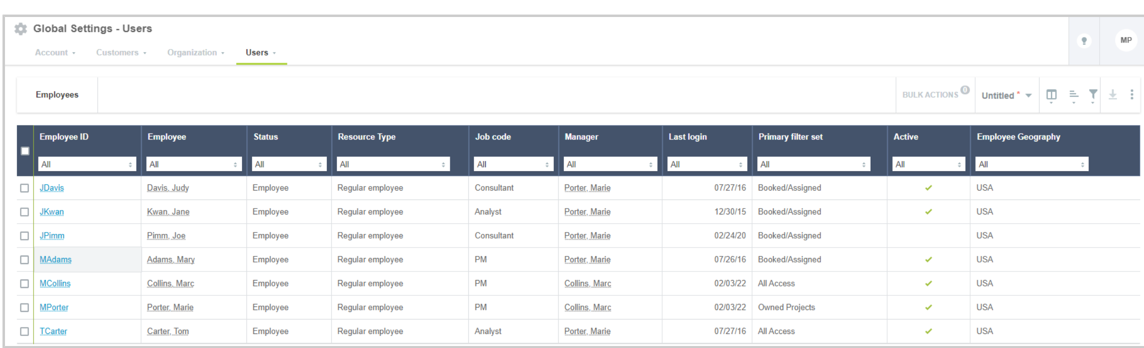
A user is an individual who has access to an OpenAir account.

- Generally, most users are employees, but third party consultants, partners, and customers can also be users.

  Note: You can also create guest records for your customers with access limited to this company's projects, invoices, or workspaces. Guest records are a special kind of employee records. See Guest Roles and Guests.

- Users need to be set up in OpenAir through the creation of employee records. For users to have access to OpenAir, their records must include a user ID, and a password, and the user must be marked as active.
- Users can be granted access to specific modules within the OpenAir user interface as well as specific add-on services.
- Users can be granted access to specific functionality and data within OpenAir.

To view the list of employees, go to Administration > Global Settings > Users > Employees.



Employee ID	Employee	Status	Resource Type	Job code	Manager	Last login	Primary filter set	Active	Employee Geography
All	All	All	All	All	All	All	All	All	All
JDavis	Davis, Judy	Employee	Regular employee	Consultant	Porter, Marie	07/27/16	Booked/Assigned	✓	USA
JKwan	Kwan, Jane	Employee	Regular employee	Analyst	Porter, Marie	12/30/15	Booked/Assigned	✓	USA
JPimm	Pimm, Joe	Employee	Regular employee	Consultant	Porter, Marie	02/24/20	Booked/Assigned		USA
MAdams	Adams, Mary	Employee	Regular employee	PM	Porter, Marie	07/26/16	Booked/Assigned	✓	USA
MCollins	Collins, Marc	Employee	Regular employee	PM	Collins, Marc	02/03/22	All Access	✓	USA
MPorter	Porter, Marie	Employee	Regular employee	PM	Collins, Marc	02/03/22	Owned Projects	✓	USA
TCarter	Carter, Tom	Employee	Regular employee	Analyst	Porter, Marie	07/27/16	All Access	✓	USA

To view an employee record, go to Administration > Global Settings > Users > Employees > [*Select an employee*].

To add an employee, click the Create button, then click **New Employee**.

The New Employee form contains several sections including employee demographic information and user settings. After you save the New employee form, the following employee information and settings tabs become available.

- The Demographic tab lets you enter demographic information for employees and set permissions and options at the user level. See Demographic.
- The Demographic, AccessControl, Filter Sets, and Proxy tabs let you control what functionality the employee has access to. See Employee Access Control Settings.
- The Schedule, Leave Accrual, Loaded Cost, Employee, Entity Tag, and Target Utilization tabs let you set information that supports OpenAir functionality. See Employee Time, Cost and Category Settings.

Demographic

The Employee Demographic form holds much information about employees. After a new employee is set up and you return to this form, it is titled Edit employee demographic information.

When setting up an employee, the first item that is presented after selecting the create option is the Demographic form. A number of fields exist on this form with only a few being required (by default) in OpenAir.

> **Note:** Form permissions are available on this form, so any field may be made to be required, read-only, or hidden if desired. See Form Permissions.

The first part of the demographic form requests general information about the employee per your organization:

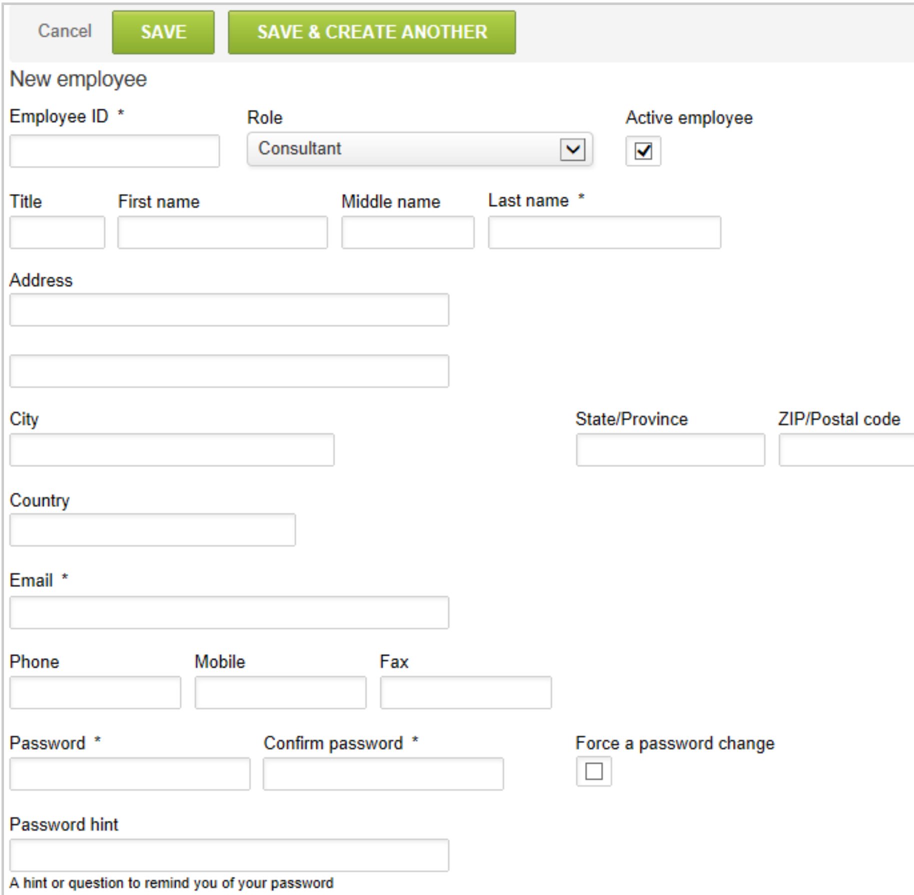
- **Employee ID —** Must be unique and is used by the employee to log into OpenAir. Many clients use the first part of the company email address as the login userid.
- **Role —** Provides permissions within OpenAir (the Role must be defined prior to setting on employee record).
- **Active employee —** This checkbox controls the activation of the employee account. If the box is unchecked, the employee does not appear in the drop-down lists populated with employee names and is unable to log in to OpenAir.
- **Name elements —** First and Last name are required. Middle and title are optional. The first and last name entered are displayed in all employee drop-down lists in ‘last name, first name' order.
- **Address information —** Optional. Address information entered may be displayed on expense reports.
- **Email address —** Required since OpenAir communicates to end-employees via email with alerts, reminders, and informational messages.
- **Password —** Required. When setting up a new employee, it is recommended to leave the hint area blank.

  > **Note:** The employee can be set to change the password upon initial login. This is helpful during the set up of new employees.

- **Manager —** The manager must be entered into OpenAir to be available in the drop-down list. The manager is frequently involved in item approvals such as timesheets and expense reports.

Note: The manager must be defined as an active employee in OpenAir to set this field. The drop-down is populated based on active employees defined in OpenAir.

- **Cost center —** Must be defined prior to setting on the employee record. See Cost Centers.
- **Job code —** Must be defined prior to setting on the employee record. See Job Codes.
- **Department —** Must be set up prior to setting on the employee record. See Departments.



Employees Demographics - Approver

A series of Approvals display for the approval process, depending on which items have been activated in OpenAir. See Approval Options. Approvals may be set to dynamic values, specific individuals, or a defined approval process.

- Dynamic values include [Self approver], [Manager], [Manager's manager], [Account owner], and [Project owner]. Each dynamic value is substituted with the employee's actual value when the approval process is executed.

Note: Account owner and Project owner may not resolve themselves to a specific named resource and may cause auto-approvals, which are not desired. These two settings are more appropriate for Project approval setups. The way OpenAir works, if project level approvals are enabled for the account, OpenAir always checks the project level for approval, AND then references the employee record setting of approval.

- The second type of approval setting is a named resource. Select the resource from the drop-down list, which contains all active employees within OpenAir.

> **Note:** This may involve more administration to keep the relevant approvers current. If a named employee is desired, an approval process containing the single employee is recommended for a single location in case the named employee changes positions within the company or leaves the company.

- The last type of approval setting is an Approval process. The approval process object permits the definition of one or more employees. It also controls the routing of an item's approval for concurrent review/approval, auto-approval based on a defined limits. Approval processes allow for easy maintenance of approval routing changes by capturing the routing in one place that is referenced among many employees and projects. When a change is made, the next execution of the process will follow the new routing definition. Approval Processes must exist prior to being selected on the employee record. See Approval Options and the approval processes associated with the Timesheets, Expenses, Invoices, Purchases, and Resources applications.

> **Note:** The **Save as the default approvers** check box sets the approvers defined in this employee record as the default for each new employee record created in OpenAir. We recommend that account administrators are the only role granted this authority. Avoid having defaults reset by other roles.

Employee Demographics - Custom Fields

You may create any number and type of custom fields to appear on the Employee Demographic form. The entry of this information is dictated based upon your company's configuration and may also be controlled through the form permissions of the Employee Demographic form. See Custom Fields.

Employee Demographics - Filters Hierarchy

There are two places on the Employee Demographic form that reference Filter Sets: Primary filter sets, with optional application overrides if you have this feature activated, and the Filter set field at the bottom of the form.

> **Note:** The difference between the settings is that one is used for granting a data view to the employee and the other is used to group the employee into the correct data view. These values may be the same or different depending on your filter set structure.

Primary Filter Set — defines what the employee can see in OpenAir. There is an optional application overrides feature, activated by OpenAir Customer Support upon request, that lets you restrict data views based on which application the employee is in. The optional override is useful for controlling items such as projects available for timesheet entry and resource booking reviews, while allowing a general view in other applications.

Filter set — The Filter set value normally found at the bottom of the form is what you use to put an employee into a data view. Depending on your OpenAir configuration, the filter set may need to be a required field to ensure correct placement of employees into data views. The Filter set and the Primary Filter Set values may not match as the employee may be allowed to see a restricted data view but need to be defined to a larger data view.

Examples of Primary vs. Filter set settings are:

- Data views are set up geographically for regional data views. The employee's Primary Filter Set is restricted to a Self view while the Filter set setting is the region with which the employee is associated such as USA. This same example applies to department viewing if you desire a unique department view, functional organization viewing, and so forth.

- One or more employee Hierarchies may also be defined to organize the employees for reporting purposes. The Hierarchies must exist prior to being selected on the employee record. The hierarchy's primary purpose is to allow roll-up reporting according to a specific structure. See Hierarchy.
- There is also the ability to limit Project level access to employee. If you have created Project hierarchies in your account and have the project level access feature activated, you are able to limit an employee's view by setting a project level access based on the defined project hierarchy. By selecting the project hierarchy and the specific node within that hierarchy, the employee's filter set has the ability to include projects in their data view within those defined hierarchy nodes. Contact OpenAir Customer Support if you would like to have the project level access by hierarchy feature activated.

Frequently Asked Questions (FAQs)

What are the differences between an employee's Primary filter set and the Filter set (shown at the bottom of the form) in the Employee Demographic form?

The Primary filter set is the data view access this employee has in OpenAir. Adding the employee to a Filter Set at the bottom of the employee form adds them to the view of other employees with that Filter Set as their Primary, and causes the employee name to display in the Access > Employee Access section of that Filter Set.

Attachments

When you create an employee record, you can add attachments to the employee record, provided the attachments functionality has been enabled in your account. Attachments can include a wide variety of documents such as the following: employment forms, client recommendations, and emails.

To add or edit attachments:

1. Select the Browse button to add a new attachment.
2. Click on the Manage current attachment link to download, replace, or delete an existing attachment.

Employee Access Control Settings

All users must be assigned one and only one role and at least one filter set. You can also set rights and privileges for users on an individual basis when creating or editing user records for your company's employees, subcontractors or guests.

This section gives an overview of the available settings relevant to configuring access control. Go to Administration > Global Settings > Users > Employees > [*select an Employee*] to review the available settings. For example:

- **User Access Removal** — Only employees marked as active employees have access to OpenAir. See User Access Removal.
- **Application Options** — Options in the **Demographic** tab control certain user privileges for the different OpenAir applications. See Application Options Overview.
- **Application Access** — The **Access Control** tab can be used to control user access to specific applications. See Access Control Overview.
- **Filter Hierarchy** — The **Primary Filter Set** and **Filter set** fields on the Demographic form as well as the **Filter sets** tab define what the user can see in OpenAir. See Filters Hierarchy Overview.
- **User Proxy** — User proxy enables an authorized employee to use OpenAir as another employee with no knowledge of that other employee's password. See User Proxy Overview.

User Access Removal

Only employees marked as active employees have access to OpenAir. To remove access to OpenAir for a particular user, either temporarily or indefinitely, clear the Active employee box on the Demographic form for this employee.

Application Options Overview

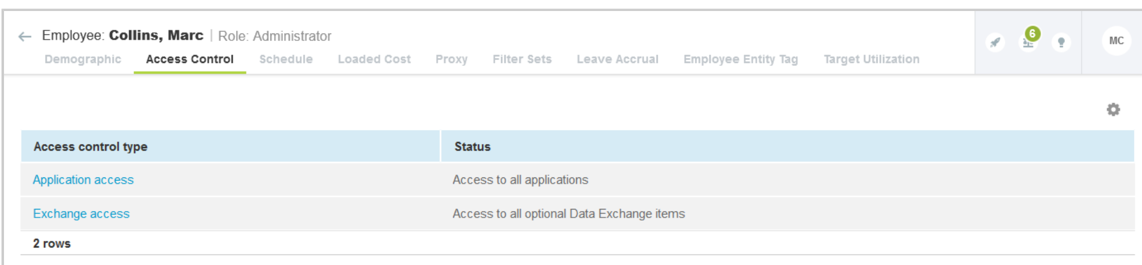
Certain user privileges can be granted or revoked from the Employee Demographic form. Scroll through the Employee Demographic form to review the options available.

In particular, you may enable users to un-approve or un-export items within OpenAir such as timesheets, expense reports, invoices, booking requests, project recognition transactions, and proposals. If the item follows the approval process functionality, an optional check box is available in the Demographic form to grant un-approve as well as un-export permission to an employee for the item. These permissions are controlled at the employee level only on the Employee Demographic form. They cannot be granted to a role.

> **Note:** These settings control approval and data export capabilities. They are sensitive and are used to support integration in many cases.

Access Control Overview

Access Control settings are available in the employee record for existing employees. When adding a new employee, the access control tab becomes available after the Employee Demographic form has been saved.



There are two main access control settings:

- **Application access** lets you control which modules (applications) are available to the employee from the main navigation menu.

  You should grant access to application on a needs basis. For example, if an employee does not have responsibility for invoicing or permissions to view invoicing data, remove `Invoices` from their application access. This helps minimize confusion for users.

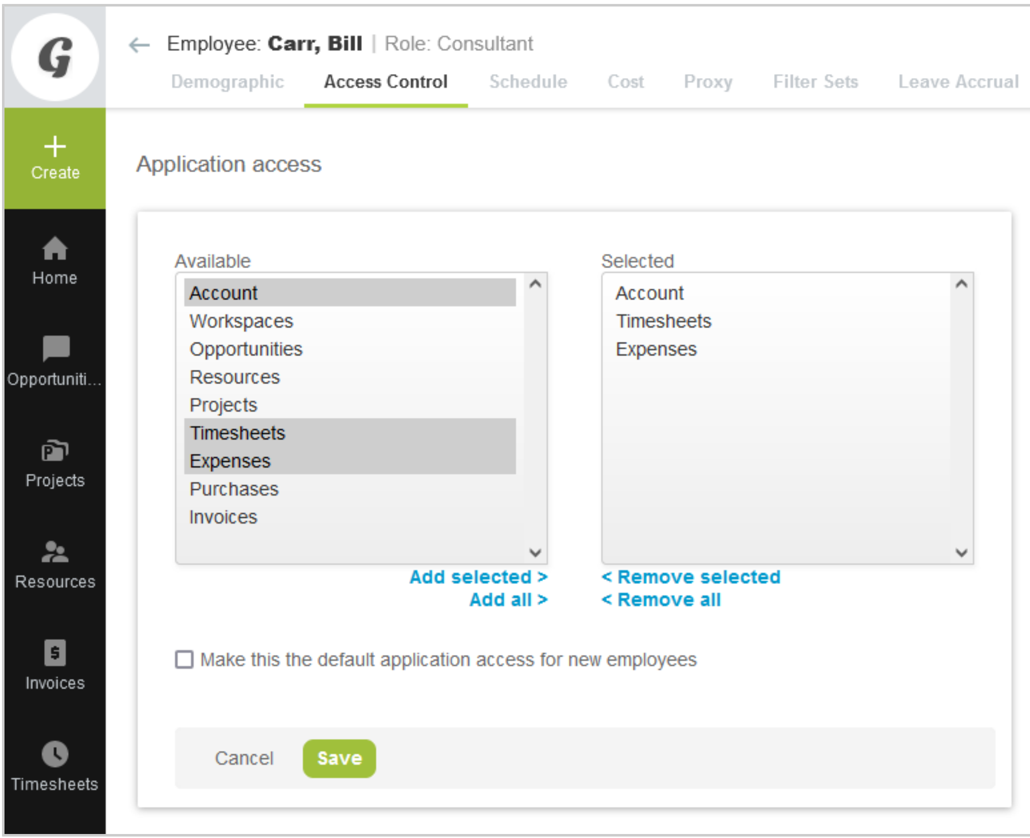
  Application access determines which type of user license is taken up by the employee. An employee with any combination of `Account`, `Timesheets` and `Expenses` application access takes up a Timesheets and Expenses (T&E) only license. An employee with any other application access takes up a Full user license. For more information, see Licenses.

  Granting application access does not automatically grant feature permission. This is controlled by the role assigned to the employee. See Role Permissions.

  Check the **Default set of applications for new employees** to grant the same application access for the new employee records you create.

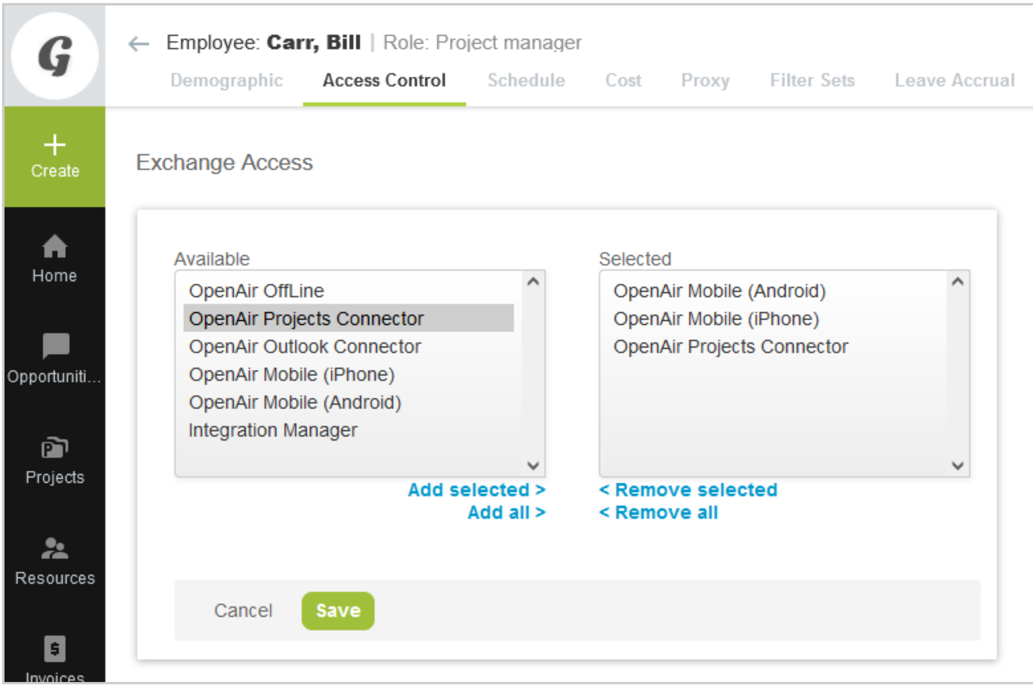
Note: Default application access typically includes Account and Timesheets. You should not grant application access other than Account, Timesheets and Expenses to avoid taking up Full user licenses unnecessarily.

Tip: The All Item Types in Calendar optional feature lets employees see their task assignments and bookings in the OpenAir calendar even if they do not have access to the Projects and Resources module. See the help topic All Item Types in Calendar.



- **Exchange access** lets you control which Add-on services the employee is allowed to download and use. An employee must have exchange access for the add-on service to be able to work with OpenAir data using the application.

Note: Removing access to an add-on service application does not eliminate the ability to download the application. The mention "Not approved for download" appears above the download link if the user has not been granted access to that application. All add-on service applications require authentication to connect with OpenAir. Authentication fails if the employee does not have the appropriate exchange access.



Filters Hierarchy Overview

Assigned filter sets determine what data users have access to. All users must be assigned at least one filter set — their primary filter set. Other filter sets can be assigned to the employee. Any filter sets may be used to override the primary filter set for a given application. You can also include an employee into the employee access definition of certain filter sets — users with any of these filter sets assigned would then have access to this particular employee.

Important: When assigning filter sets to an employee, you should assign only the filter sets that show the data the employee need to access in the course of their current work. If the employee's responsibilities change over time you should change the filter sets assigned to this employee accordingly.

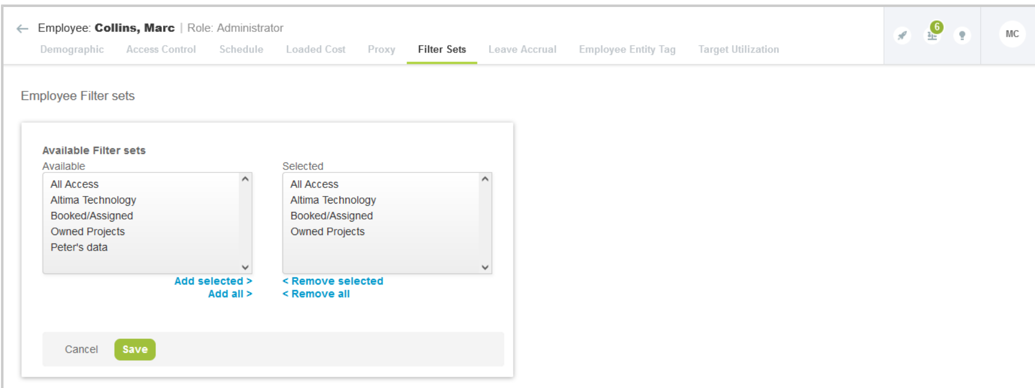
The following settings are available on the employee record:

- **Filter Sets tab** — Use the **Filter sets** tab to assign multiple filter sets to the employee. To do so:
  1. Go to Administration > Global Settings > Users > Employees > [*Select an employee*] > Filter Sets.
  2. Select filter sets from the **Available Filter sets** list and click **Add selected**.
  3. Click **Save**.

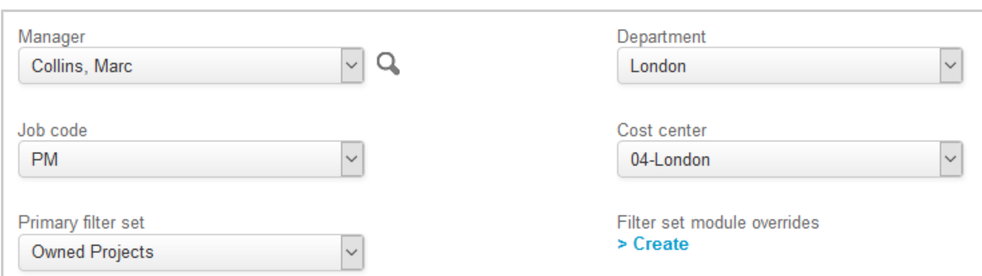
  Users only have one of their assigned filter sets active at a given time and can switch between assigned filter sets to access different types of data.

Tip: When the `All Access` filter set is assigned to an employee, you should assign multiple filter sets and include filter sets that return significantly less data when viewing transaction lists such as a booking list, for example. This enables the employee to change filter set and limit the amount of records on lists to speed up loading times and improve the performance of list views.

Note: You can also assign filter sets to employees when creating or editing filter sets. See Filter Sets Overview.



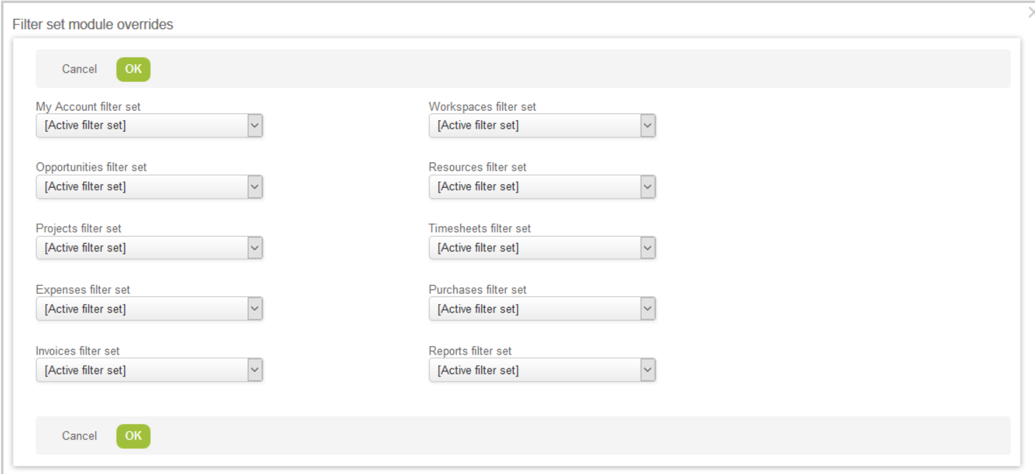
- **Primary Filter Set** — All users must be assigned at least one filter set — their primary filter set. This is set to the default filter set when creating or importing users. You can select a primary filter using a dropdown in the top section of the Employee Demographic form. If the primary filter set was not already assigned to the user, it is added to the list of assigned filter sets on the **Filter Sets** tab.



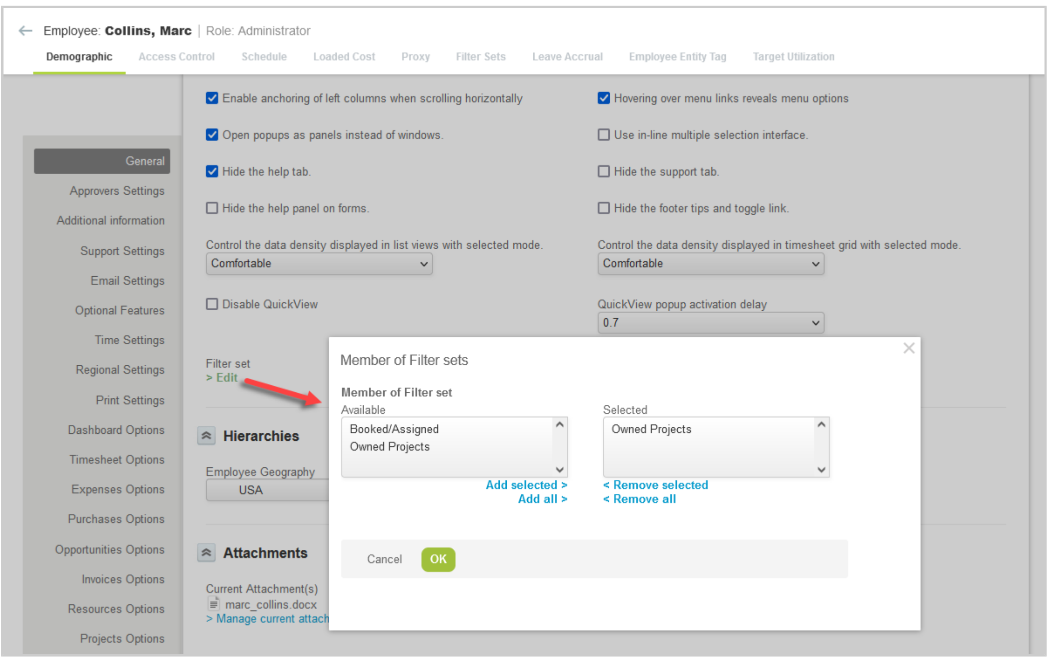
- **Filter set modules overrides** — This optional application overrides feature allows you to grant or restrict access to data depending on the OpenAir application the employee is using. Contact OpenAir Customer Support to enable this feature.

  The optional override may be used to control items such as projects available when users fill a timesheet or review resource booking, for example, while allowing a general view in other applications.

  When the feature is enabled, an additional setting becomes available on the Employee Demographic form next to **Primary filter set**. Click the **Create** link to define filter set overrides. Any of the available filter sets can be selected for each application. Changing the primary filter set or changing the active filter set does not impact the application overrides, unless the override setting is **[Active filter set].**



- **Filter set** — You can include an employee into the employee access definition of certain filter sets if the filter set restricts employee access. Users with any of these filter sets assigned would then have access to this particular employee. Use the **Filter set** setting, normally found in the Display Options section at the bottom of the Employee Demographic form to ensure the employee is included in the employee access definition of selected filter sets. Depending on your configuration, this setting may need to be a required field.



Project level access

An optional feature enables to restrict project access according to a defined project hierarchy. With this feature enabled, the **Use to determine filter set access for projects** check box becomes available on the Edit hierarchy form. If this option is selected, a **Project level access** section becomes available on the Employee Demographic form and you can assign a node in that project hierarchy to the user. You can restrict access to project information relevant to the assigned project hierarchy by creating a filter set and configuring project access to **[Access to Projects in my hierarchy node]**. Contact OpenAir Customer Support and ask for the following feature to be enabled: **Enable ability to define project hierarchy for filter sets**.

For more information about configuring and using hierarchies, see OpenAir Administrator Guide under Global Settings > Company > Hierarchy.

User Proxy Overview

User proxy enables an authorized employee to use OpenAir as another employee with no knowledge of the other employee's password. If users are granted the right to proxy in as other users, they can click **Log in as** from the **User Center** menu and select an employee from a list of available proxies to log in on their behalf. A new instance of OpenAir opens allowing the employee to perform a function for the proxied employee.

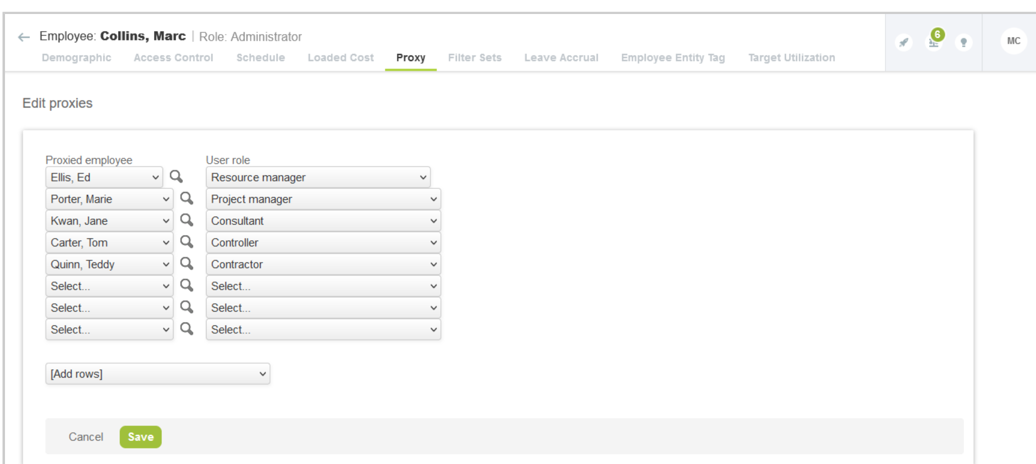
Users with the role permission **Create own proxies** enabled are permitted to designate proxies who will be able to log in and perform a function on their behalf. **Proxy restrictions** may also be set for the role.

The role permissions a user will have when proxying in as another employee is specified in the proxy configuration.

The user proxy feature is helpful for delegating certain processes when employees are out of the office or do not have access to OpenAir. However, it can have security implications. Account administrator should exercise control over users ability to proxy and set expiration dates for user proxies to ensure that proxying rights are granted only when required and to authorized users only.

To enable an employee to proxy in as another employee:

1. Go to Administration > Global Settings > Users > Employees and click the Employee ID of the employee you want to grant the proxying rights to.
2. Click the **Proxy** tab.
3. Select the **Proxied employee** and **User role**. This will determine the role permissions the user will have when proxying in as the proxied employee. Use the role assigned to the proxied employee on their Demographic form to ensure the proxying user has the same permissions as the proxied employee.
4. Set an **Expiration date** if required by the Proxy Expirations configuration settings. This ensures the proxy expires automatically on the specified date. See Enabling Proxy Expirations.
5. Click **Save**.



Users with the role permission **Create own proxies** enabled are permitted to designate proxies who will be able to log in and perform a function on their behalf.

If the Proxy Approver Notifications feature is enabled for your OpenAir account, and if the designated proxy employees can approve transactions on their behalf, proxy approvers receive notification email messages about transactions awaiting the proxied employee's approval. See the help topic Proxy Approver Notifications.

Note: Account administrators cannot create their own proxies for security reasons. It is not possible for any employees to log in on behalf of an employee with an account administrator role.

To enable another employee to proxy in as oneself:

1. Go to the **User Center** menu and click **Proxies**.
2. Select a user who may proxy.
3. Click **Save**.

Enabling Proxy Expirations

After the proxy expiration is activated you will able to set expiration date when editing user proxies.

To enable expiration dates for proxies:

1. Go to Administration > Global Settings > Account > Proxy Expirations.
2. Check the **Proxies have expirations dates** checkbox.
3. Select a **Default proxy expiration** period from the dropdown options.
4. Click **Save**

Tip: You can configure OpenAir to send an email notification whenever an item is submitted or approved by a proxy. For example, you can go to Administration > Application Settings > Timesheets and configure OpenAir to notify the **[Approver]** whenever a timesheet **Was approved by proxy**.

Employee Time, Cost and Category Settings

OpenAir lets you enter information related to the employee's time and cost on the employee record. An optional feature lets you categorize employees. After you save the employees form, the following tabs are available on the employee record.

- Schedule
- Cost
- Leave Accrual
- Employee Entity Tag
- Target Utilization

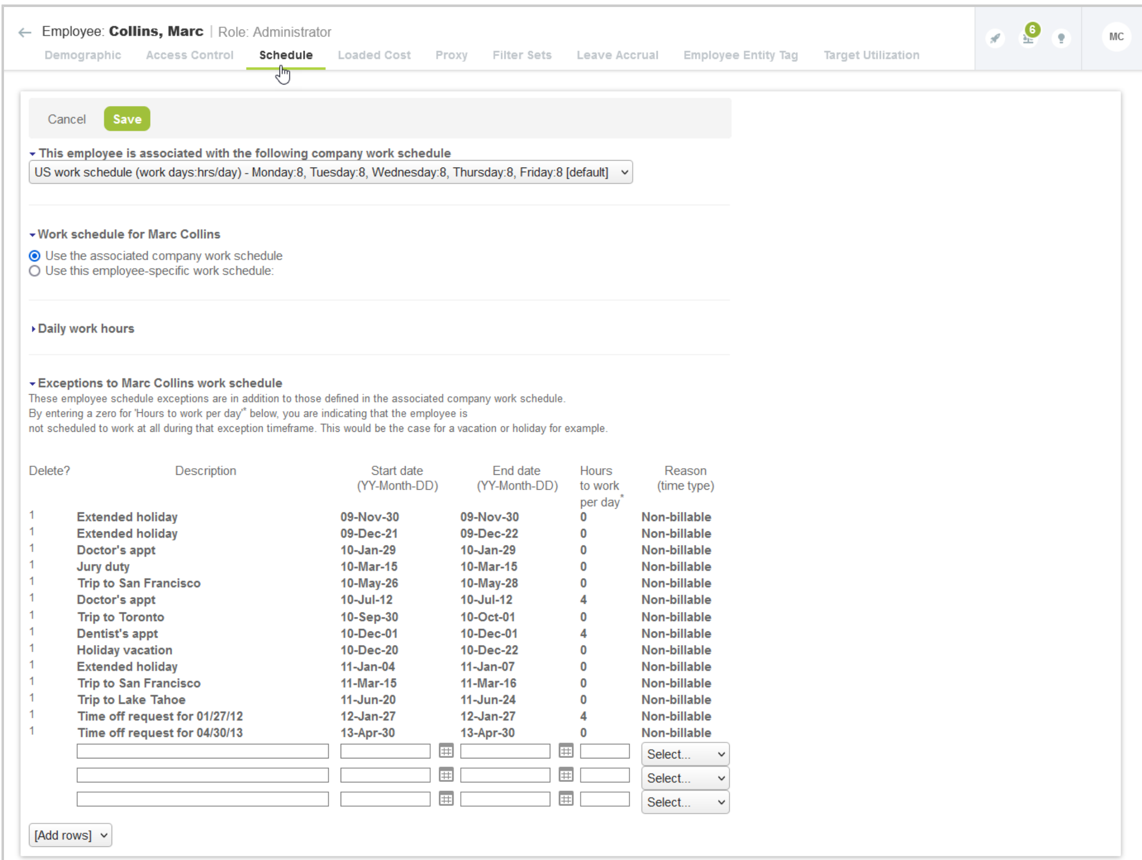
Schedule

The Schedule link displays within the employee record after the Employee Demographic form has been saved. By default each employee has the company work schedule set. You can use the associated work schedule for your employees or you can define a work schedule specific to a particular employee. For more information about company work schedules see Work Schedules.

If work schedule time ranges are enabled, you can define start times for each day of the week. See Optional Features.

> **Note:** You need to enable work schedule time ranges and ensure that employees work schedules include start times to create bookings with start and end times for these employees, see Frequently Asked Questions (FAQs) under the Resources chapter.

For new employees to the company, you should enter a schedule exception for a system start date to the day before work begins to ensure utilization reporting is accurately recorded. When the employee leaves the company, you should enter a schedule exception for the day after departure to a future date approximately five years into the future to ensure correct utilization reporting.



To define a work schedule specific to an employee:

1. Go to Administration > Global Settings > Users > Employees > [*select an employee*] > Schedule.
2. Choose the **Use this employee-specific work schedule** under the Work schedule for `<employee's name>` section.
3. Check the boxes for each day of the week the employee is available.
4. Enter the **Work hours per day for this employee**.
5. If work schedule time ranges are enabled for your account:
   a. Under the Daily work hours section, enter either a **Default start time** or a start time for each day of the week the employee is available. The end time is set based on the number of hours for that day.
   b. (Optional) Enter a **Description**.

6. Add any exceptions to <employee's name> work schedule.
7. Click **Save**.

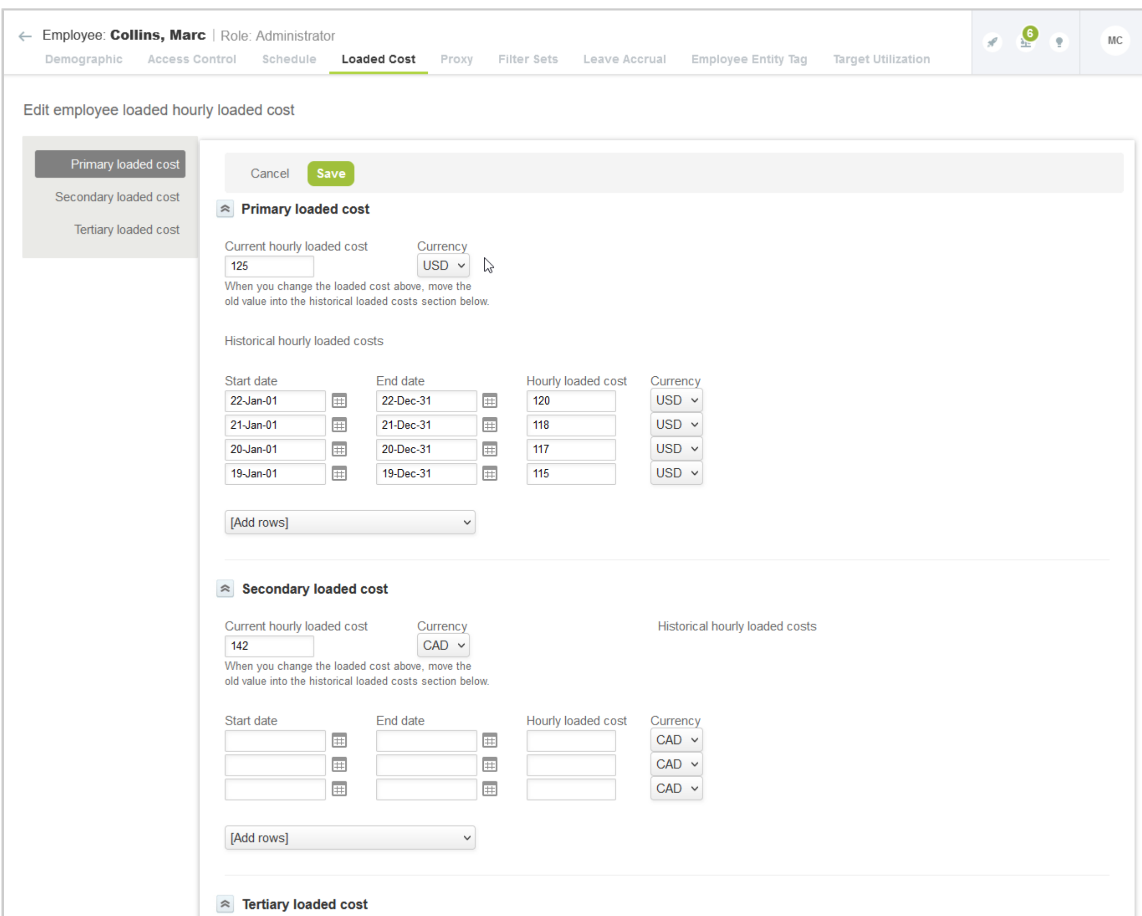
Frequently Asked Questions (FAQs)

What is the difference between an employee's schedule and the company Work Schedule, set up under Global Settings > Work schedules?

The company Work Schedule is the baseline work schedule for the specific regions/areas within your company. The default work schedule displays in each employee's demographic until it is changed. A employee's schedule, on the other hand, is unique to that particular employee. You can accommodate a variety of situations with this feature. For example, you may have employee (a part-time employee) that works from 9:00 a.m. - 1:00 p.m. each day or an employee that works 4 days per week (Monday - Thursday) for 10 hours per day.

Cost

The Cost link displays within the employee record after the Employee Demographic form is saved. Employee cost should be a fully loaded cost, ideally normalized for job code bands and thus obscuring specific salary information. Cost information may be restricted by role and by removing the view form permissions on the role assigned to the employee. There is a "current" cost value and additional rows so that historical costs may be captured for individual employees and is automatically utilized in reporting. Historical costs may be tracked in multiple currencies. This is helpful if resources moved between geographies and were subsequently paid out in different currencies.



You are also able to store three levels of costs within OpenAir: primary, secondary, and tertiary. These costs can be used in detail and summary reporting. You must enable the three levels of costs for your account by contacting OpenAir Customer Support. Request that the following internal switches be enabled: Show cost tab or form if employee can view any of the loaded cost levels and Available loaded costs (Support - Check with Sales before enabling). You can control access to view each level of cost by the role settings.

Leave Accrual

Leave accrual rules establish the framework for employees to accrue and draw down time. Select the leave accrual rules that apply to the employee.

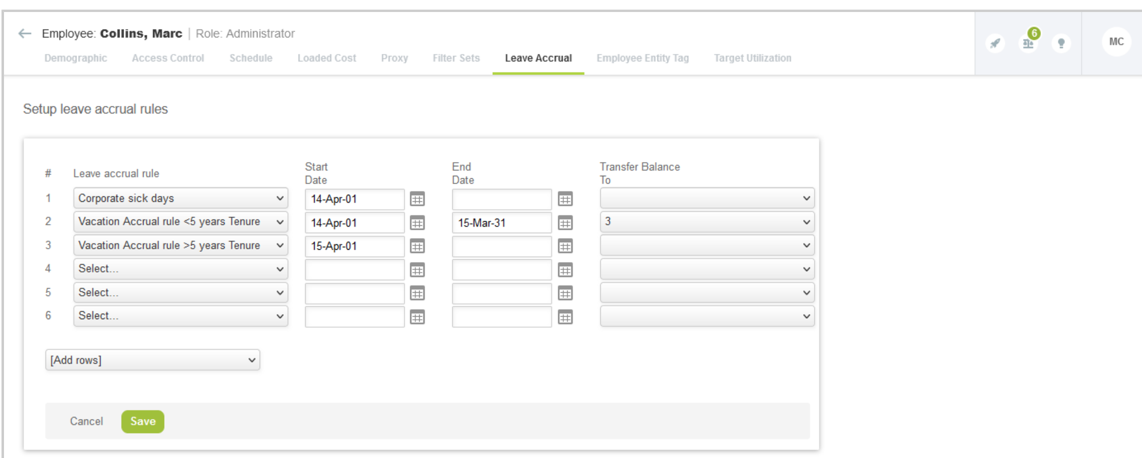
To add or remove Leave accrual rules:

1. Go to Employees and select a Employee ID. Click Leave accrual.
2. Select the Leave accrual rule from the drop-down list.
3. Enter leave accrual rule information such as Start Date and End Date.
4. Select the leave accrual rule number to Transfer Balance To that applies to this rule.

   > **Note:** You can transfer leave balances from one rule to another rule. This is useful if an employee has multiple leave accrual rules and some have end dates applied. When setting up leave accrual transfers, be sure to consider the timing of leave accrual in the rules.

5. Click Save.

There is an advanced report that displays leave time accrued at a glance, draw down and available leave balances by employee and by period, along with other details like department, manager and employee cost center. To run this report, go to:
Reports > Advanced > Timesheets > Leave accrual summary.



Employee Entity Tag

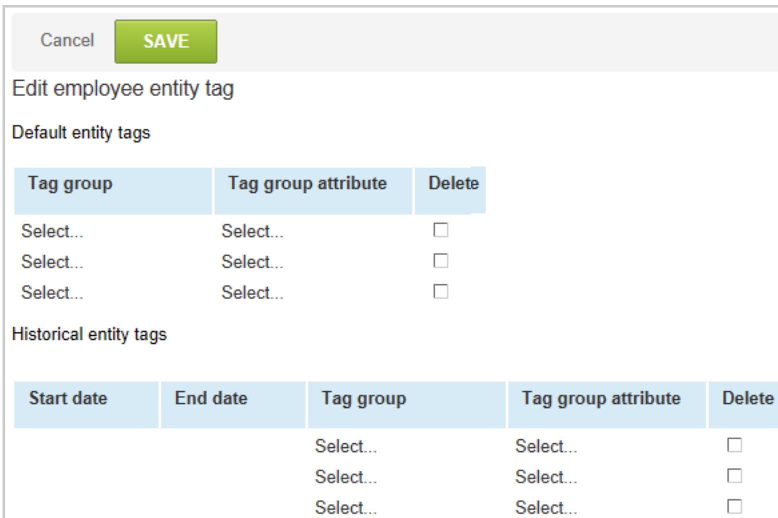
The Employee entity tag link displays within the employee record after the Employee Demographic form is saved and the employee tag feature is enabled.

Tag groups are defined with specific attribute values. When tag groups have been established in OpenAir, the Employee entity tag may be modified for each employee. See Tag Groups.

The Employee entity tag provides a custom field with historical data tracking ability. The viewing of tag groups and attributes can be controlled by role permissions. This permits the tracking of sensitive information, such as HR data, and can restrict data access within OpenAir by the employee's role. When you have applied a Tag group entity tag to an employee, you can customize the Employees list view to display the tag group value.

To enable the Employee entity tag feature:

1. Go to Administration > Global Settings > Account > Optional features.
2. Check the **Enable employee tag feature** box.
3. Click **Save**.

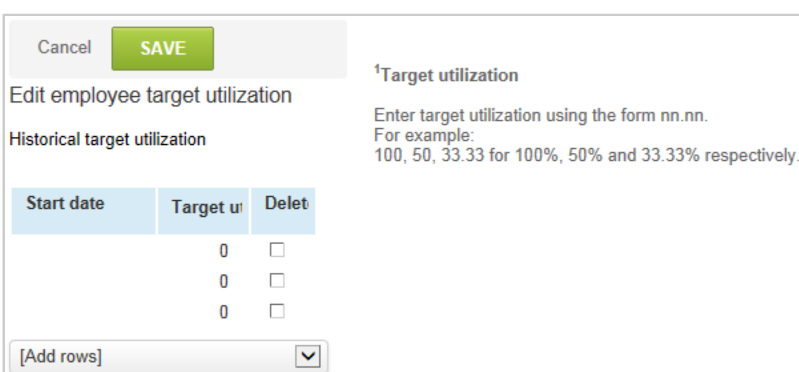


Frequently Asked Questions (FAQs)

How would I use the Employee Entity Tag?

The Employee entity tag feature within OpenAir lets you specify particular attributes to an employee. Although different from the standard fields on the demographic, these attributes can also be reported on within OpenAir. to use the Employee entity tag, you must have created Tag groups and the Attributes within them. See Tag Groups for instructions on how to create Tag Groups. Tag group values can be added to the Employees list view.

Target Utilization



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The Target utilization link displays within the employee record after the Employee Demographic form is saved and the Target utilization feature is enabled. Target utilization is defined as the utilization expected from an employee for capacity planning purposes. After a target utilization has been set, various values become available for reporting including Target utilization, Base target hours, and others. Target utilization will be available in both utilization reporting as well as capacity reporting. Historical utilization reports may also be created.

To enable the Target Utilization feature:

1. Go to Administration > Global Settings > Account > Optional features.
2. Check the **Enable target utilization feature** box.
3. Click **Save**.

Global Features

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

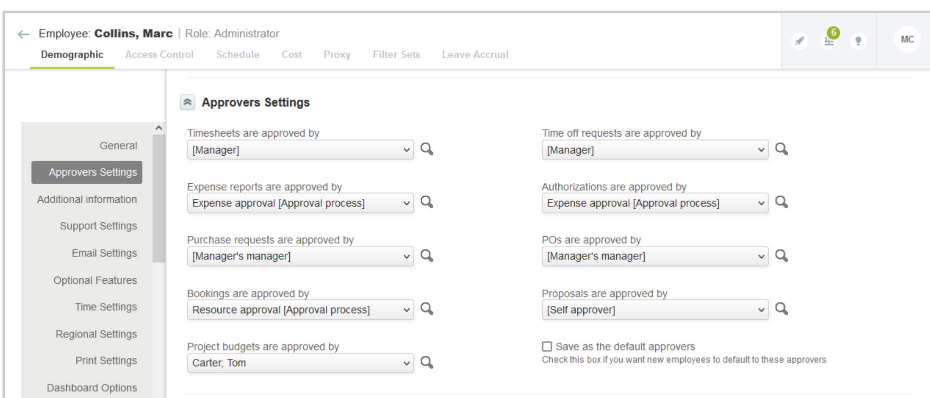
- Approval Routing
- Customization Center
- Custom List View Configurations
- Deleted Attachment Recovery
- Form Default values
- Form Permissions
- Notifications
- Data Deletion

Approval Routing

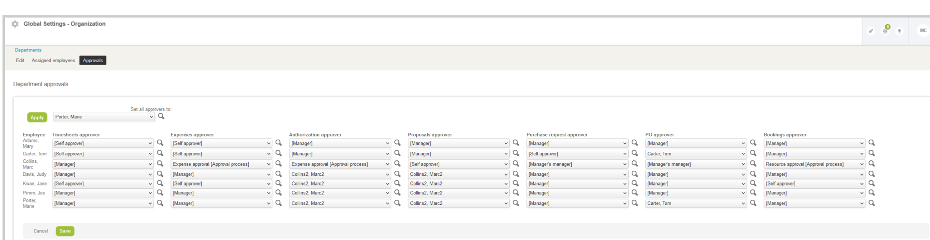
You can configure OpenAir to require approval for certain type of transactions before these transactions can be processed. See Transaction Types Supporting Approvals.

You can select who approves transactions depending on the type of transaction at 3 different levels:

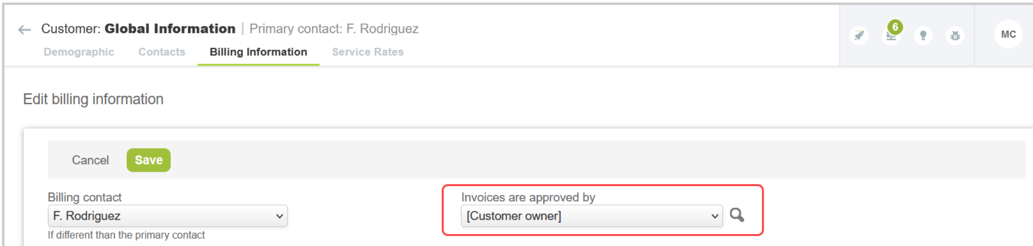
- Employee-level approval routing — You can control who approves transactions submitted by an employee on:
  - The employee record. To do so, go to Administration > Users > Employees > [*Select an employee*] > Demographic and scroll to the Approval settings section.



  - The department record. To do so, go to Administration > Organization > Departments > [*Select a department*] > Approvals.



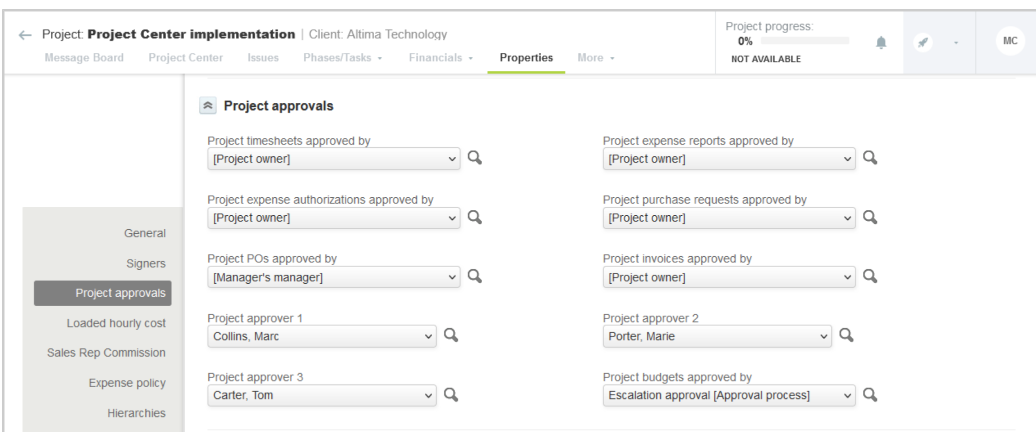
- Customer-level approval routing — If invoices approvals are enabled, you can control who approves invoices for each customer on the customer record. To do so, go to Administration > Global Settings > Customers > [*Select a customer*] > Billing Information.



- Project-level approval routing — You can control who approves transactions associated with each project on the project record. You can also designate up to three employees (**Project approver 1**, **Project approver 2**, and **Project approver 3**) to approve transactions for the project as part of an approval process. To do so, go to Projects > Projects > [*Select a project*] > Properties and scroll to the Project approvals section.

  For more information about approval processes, see Approval Processes.

> **Important:** The project-level approval routing functionality is optional. To enable project-level approval options, go to Administration > Global Settings > Organization > Approval Options. See Transaction Types Supporting Approvals and Approval Options.
>
> When project level approvals are enabled and set for the project associated with the transaction to be approved, transactions submitted for approval are routed according to both project level and employee level approval settings. Transactions submitted for approval are routed according to the project level approval settings first, and routed according to the employee level settings after the project level approvals are obtained.



For each transaction type, select the appropriate approval routing from the dropdown list. Approval can be routed to:

- A named employee.
- A dynamic value (metavalue) — The approval is routed to an employee determined automatically based on the project or the employee associated with the transaction to be approved.
  - `[Self approver]` — Transactions are approved automatically when submitted.

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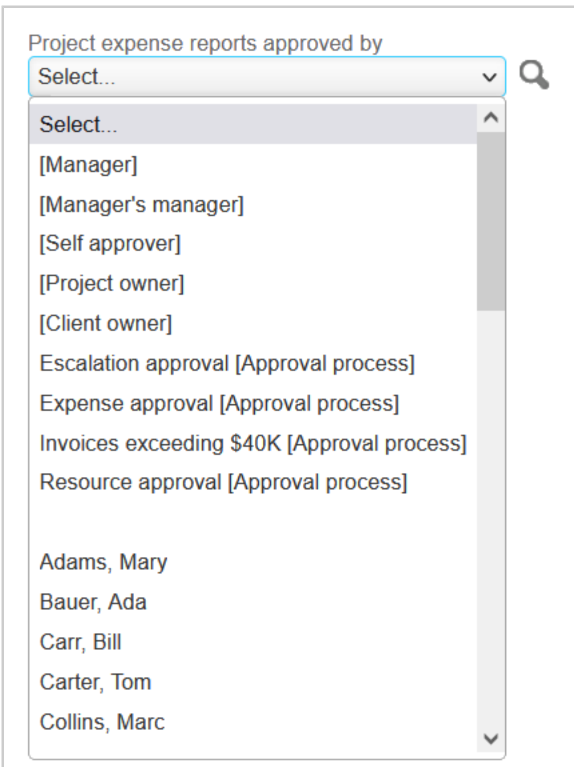
    - `[Manager]` — Approvals are routed to the manager of the employee who owns the transaction to be approved.
    - `[Manager's manager]` — Approvals are routed to the manager of the manager of the employee who owns the transaction to be approved.

  Metavalues at project-level also include:

    - `[Project owner]` — Approvals are routed to the employee who owns the project associated with the transaction to be approved.
    - `[Customer owner]` — Approvals are routed to the employee who owns the customer whose project is associated with the transaction to be approved.

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



Transaction Types Supporting Approvals

The following table lists the transaction record types for which employee-, customer-, or project-level approval routing is available. Some transaction approvals are available as standard when the transaction type is enabled, other transaction approvals are optional. To control most optional transaction approvals, go to Administration > Global Settings > Organization > Approval Options. See Approval Options.

Transaction	Employee-level (Employee record)	Employee-level (Department record)	Customer-level	Project-level
Authorization (Expenses)	✓	✓	—	Optional
Booking *or* Booking requests	✓	✓	—	Optional
Expense report	✓	✓	—	Optional
Invoice Credit invoice Rebill invoice	—	—	Optional	Optional
Profile (Resources)	✓	—	—	—
Project budget	✓	—	—	Optional
Proposal	Optional	Optional	—	—
PO	✓	✓	—	Optional
Purchase request	✓	✓	—	Optional
Time off request	✓	—	—	—
Timesheet	✓	✓	—	Optional

Approval Processes

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

You can create any number of approval processes to meet your business requirements. See Creating an Approval Process.

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

Creating an Approval Process

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

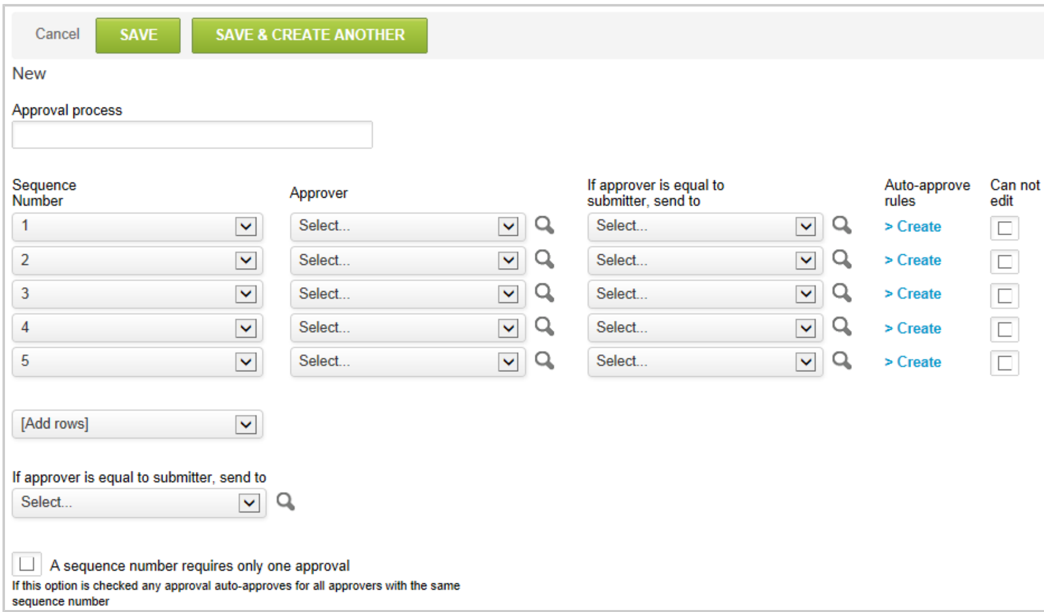
To create an approval process:

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

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

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

   The approval process entity form appears.



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

   For each row:

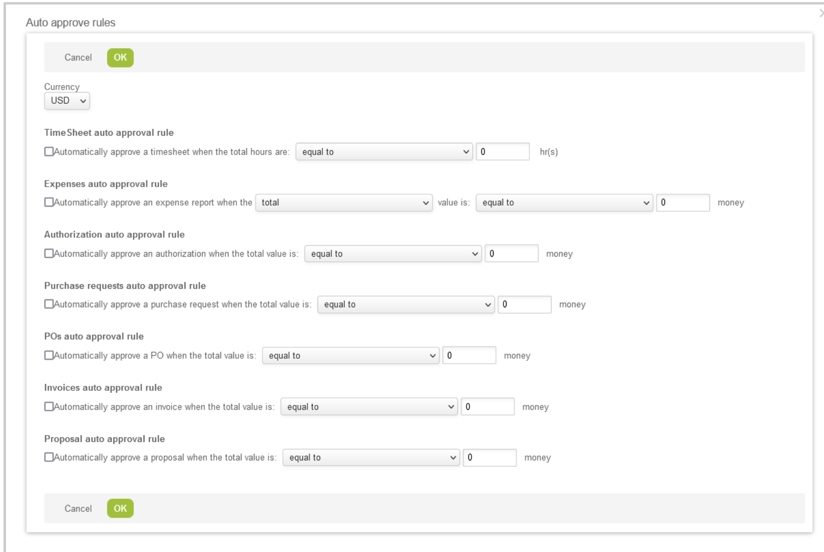
   a. Select a **Sequence Number**. The sequence number indicates the level of approval (the order in which the record or transaction is routed for approval). Multiple rows can have the same sequence number.
   b. Select an **Approver**. This can be a named employee or a dynamic value (metavalue) such as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

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

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

      i. Click **Create**.

         The Auto-approve rules form appears.



ii. Check the box for each rule you want to apply, and select the field (if applicable), the comparison operator, and the value.

iii. Click **OK**.

e. (Optional) Check the **Can not edit** box to prevent the approver from modifying the record or transaction before approving it, if your account is configured to allow approvers.

f. **Assign after** — This field is available only if two or more rows in the approval process have the same sequence number. You can use this field to escalate the approval automatically if the record or transaction is not approved or declined within the specified number of days after submission. OpenAir will route record or transaction automatically to the approver on this row if the previous approver with the same sequence number does not approve or reject the record or transaction. The previous approver can still approve or decline the record or transaction after the approval is escalated.

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

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

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

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

7. Click **Save**.

Modifying an Approval Process

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

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

To modify an approval process:

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

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

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

Customization Center

The customization center in the Administration module provides a single location to set form permissions and create custom fields for all record types supporting these features.

The customization center lets you:

- Customize forms from one location, without having to go to each form to access form permissions for the form.
- Make changes across multiple forms.
- Validate settings made between related forms.

Customization of your OpenAir account extends beyond the settings available in the customization center. User scripting lets you customize the OpenAir functionality to meet your business requirements. For example, you can use the customization center to show messages on forms at all time (see Form message) or depending on certain conditions (see Permission Rules), but you can also show confirmation, warning and error messages on forms using form scripts. See the help topics NSOA.form.confirmation(message) and NSOA.form.error(field, message) under OpenAir User Scripting Guide.

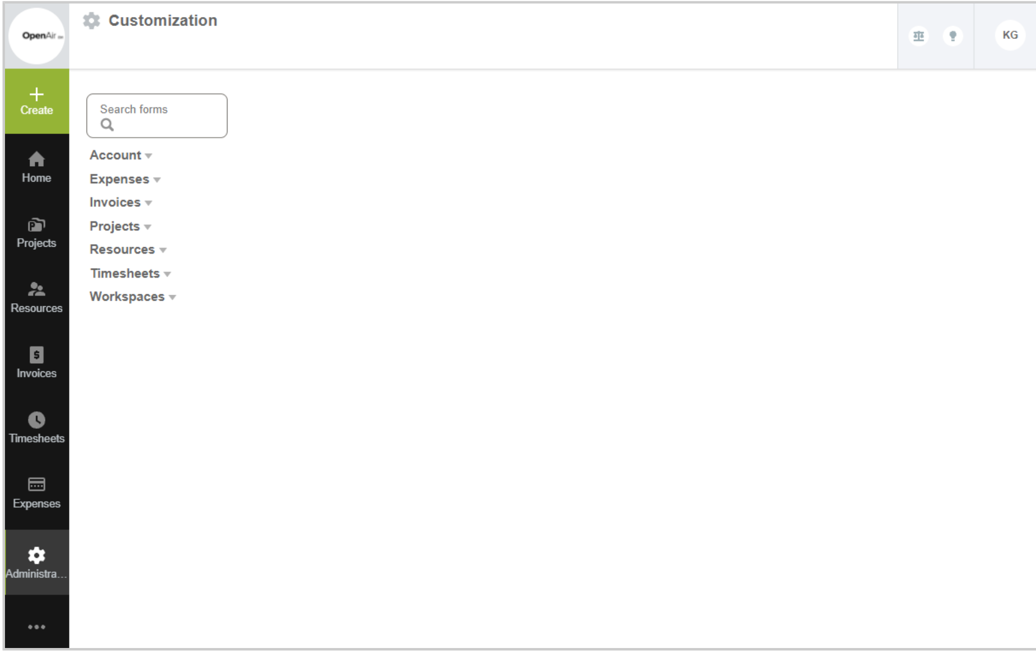
Viewing or Setting Form Permissions in the Customization Center

You can set form permissions and create custom fields for all record types from the customization center.

To view or set form permissions in the customization center:

1. Go to Administration > Customization.

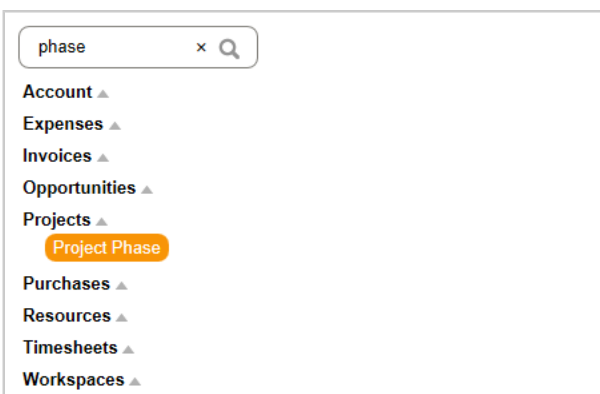
   The Customization pages shows the list of OpenAir modules (applications). You can click the caret next to each module name to expand the list of forms in each module. Each form is referenced by the corresponding record type.



2. Enter part of the record type for which you want to view or set form permissions in the search box.

   The lists of available forms under each module are expanded and filtered as you type. Matching strings are highlighted in bold in the filtered list.

> **Note:** Some record types have different sets of form permissions depending on whether you are adding a new record or modifying an existing record. In this case, the list shows both sets under `<record type> [New]` for form permissions applicable when adding new records and `<record type> [Edit]` for form permissions applicable when modifying existing records. There are two sets of form permissions for timesheets, for example: `Timesheet [New]` and `Timesheet [Edit]`.

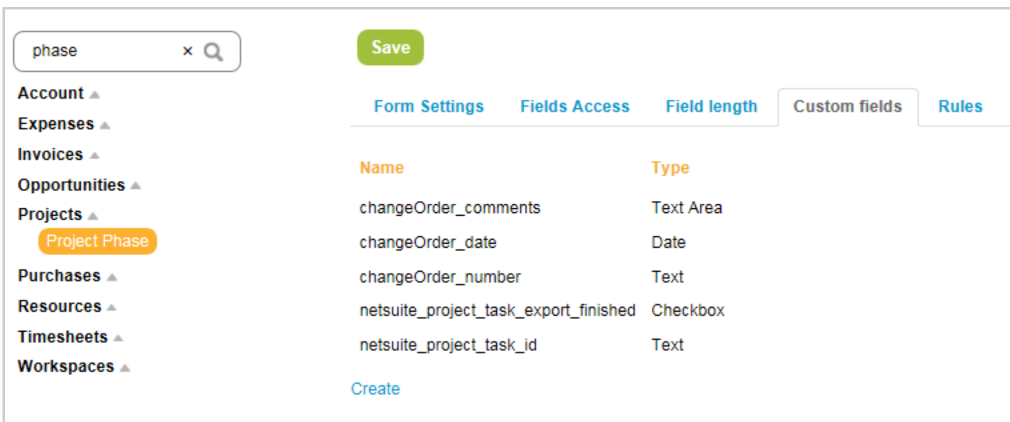


3. Click the record type to view or edit the permission settings for this form.

   The page shows the following tabs:

   - **Form Settings** — The Form Settings tab includes the following form permissions form sections:
     - **Form options** — Control general form display options. See Form options.
     - **Form message** — Add a custom message to the form. See Form message.
   - **Field Access** — The Field Access tab includes the following form permissions form sections:

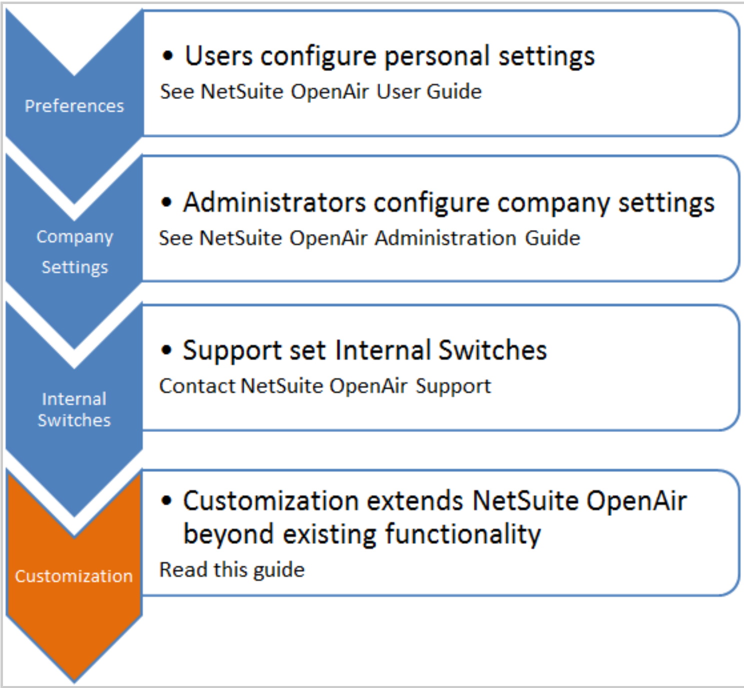
  - **General permissions** — Control users' ability to save and delete records. See General Permissions.
  - **Field settings** — Control users' permission rights for each field on the form. See Field Settings.
  - **Hidden divider sections** — Control users access to specific groups of fields. See Hidden Divider Sections.
- **Field Length** — The Field Length tab shows the Text field length section of the form permissions form and lets you control the maximum length of text fields on a form. See Text Field Length.
- **Field Order** — The Field Order tab shows the Field order section of the form permissions form and lets you control the order fields appear on the form if the record type supports this feature. See Field Order.
- **Custom Fields** — The Custom Fields tab lists the existing custom fields for the record type, and lets you create new custom fields. For more information about custom fields, see Custom Fields.
- **Rules** — The Rules tab shows the Permission rules section of the form permissions form and lets you control users' permission right dynamically when certain conditions are met. See Permission Rules.



4. Make changes as required. For more information about setting form permissions and creating custom fields, see the help topics referenced above.
5. Click **Save**.

> **Note:** You must save any form permission changes for one record form before you click on a different record type to view the form permissions for that other record type.

Customization Overview



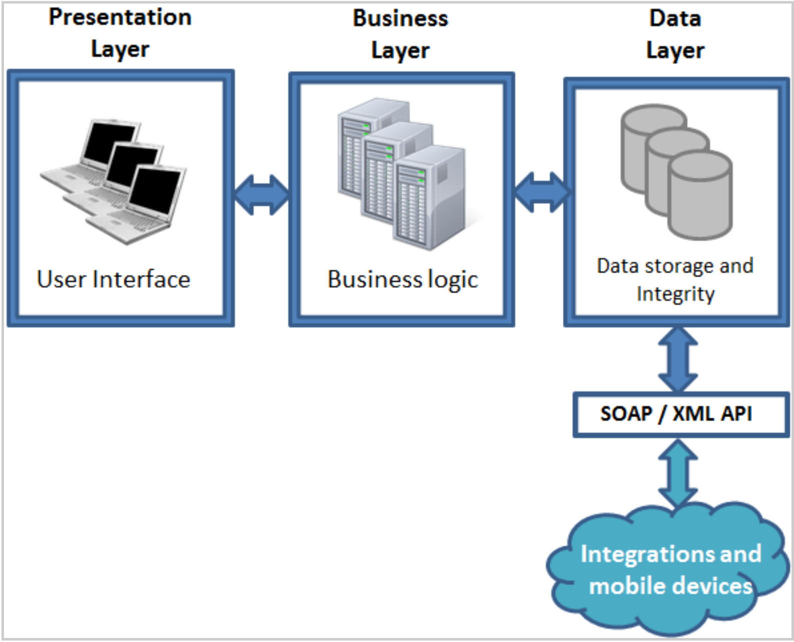
OpenAir is a highly configurable system.

- Users can set personal settings to tailor OpenAir according to the way they prefer to work. See OpenAir User Guide.
- Administrators configure the company settings to tailor OpenAir according to their company business processes. See help topics in this guide.
- OpenAir Professional Services set internal settings during the initial configuration for your OpenAir account. To take advantage of additional functionality as your business requirements evolve or as new features become available, you can submit a case to OpenAir Customer Support and request for optional features controlled by internal settings to be enabled. See OpenAir Optional Features Book.

Customization is one component of the OpenAir platform. It lets account administrators customize OpenAir to better meet the unique needs of your business. It includes:

- Custom Fields
- Form Permissions
- Notifications
- Approval Routing
- User scripting — See OpenAir User Scripting Guide.

An application system such as OpenAir consists of three logical layers (presentation layer, business logic layer, and data layer), and application programming interfaces (API) that lets you integrate OpenAir with add-on services, and other software applications in your infrastructure.



Presentation Layer

Users interact with OpenAir through forms and fields. You can extend these forms by creating Custom Fields and then define how users can interact with the fields by setting Form Permissions. Custom fields have a data component (Entity) and user interface component (Form), see Record Types and Forms Supporting Custom Fields.

Custom fields are displayed together as a block on a form. Your can organize the custom fields using Dividers and Sections and positioned them as required on the form. See Custom Field Position.

Custom messages can be displayed to assist and enforce the user in following your business processes. See Form message and Permission Rules.

Business Layer

You can extend and create business rules through Form Permissions, Notifications, and Approval Routing.

The Custom Fields you create can be added into your business rules.

Data Layer

You can create Custom Fields to track additional information.

Custom fields have a data component (entity or record type) and user interface component (form), see Record Types and Forms Supporting Custom Fields. To create a data component with no user interface component, check the **Hide on data entry forms** box for the custom field. See Defining Custom Fields.

The custom fields you create are available through the OpenAir API. OpenAir also uses custom fields to support additional features and integrations.

SOAP / XML API

The OpenAir API provides programmatic access to your OpenAir account data and business processes without using the OpenAir UI. You can use the OpenAir API to perform operations and integrate OpenAir with other applications.

OpenAir API includes the following component APIs:

- OpenAir XML API – OpenAir XML API interfaces with the data layer in OpenAir and provides the most comprehensive programmatic access to your OpenAir data.
- OpenAir SOAP API – OpenAir SOAP API uses SOAP-based web services, and serves as a wrapper around OpenAir XML API, providing the same or similar functionality.
- OpenAir REST API – OpenAir REST API interfaces with the business layer in OpenAir. This ensures that business rules configured for your OpenAir account are applied when an integration application interacts with your OpenAir data through OpenAir REST API. However, OpenAir REST API is limited in scope compared to OpenAir XML API And SOAP API and currently provides access to selected OpenAir object types only. For more information about

For more information, see the help topic OpenAir API.

> **Note:** OpenAir SOAP API can be directly accessed through User Scripting. For more information, see OpenAir User Scripting Guide.

Custom List View Configurations

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

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

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

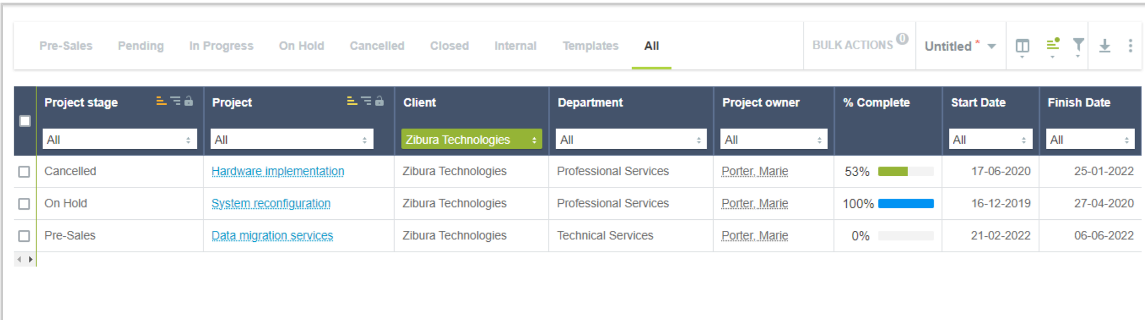
You can save list view configurations for all existing list views. Saved list view configurations are linked to the list views they can be applied to. For example, your project list views have their own sets of list view configurations, as do expense list views and invoice list views.

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

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

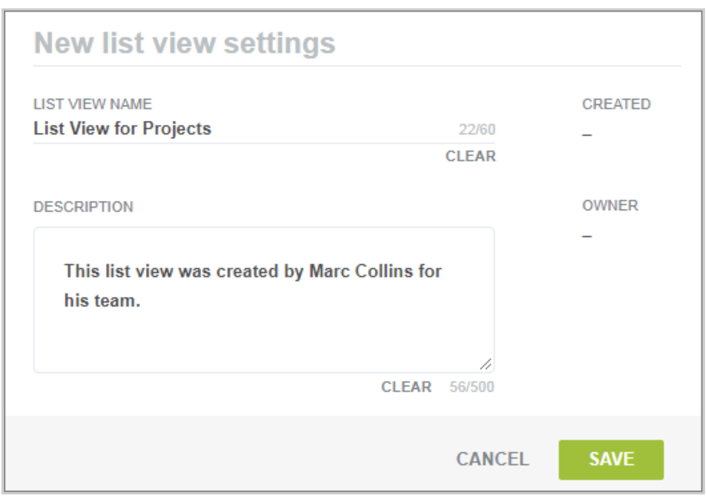
Account administrators may set or change a default configuration at any time. Unsaved changes will be lost and the new default configuration will automatically apply to your list view if:

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



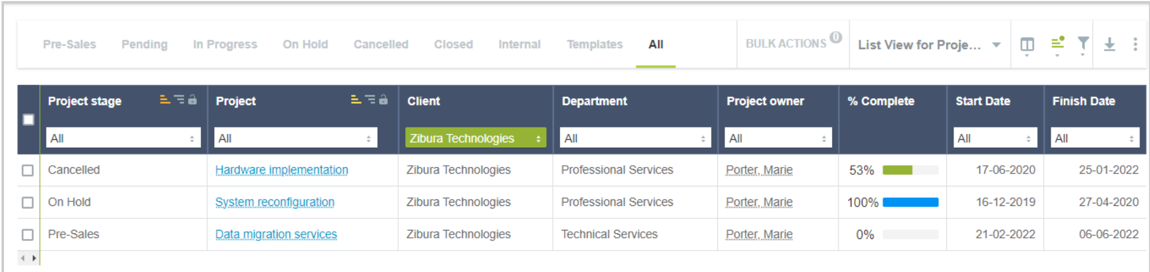
To save a new list view configuration:

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

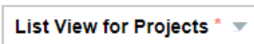


4. Click **Save**.

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



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



To save changes to an existing list view configuration:

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

To create a new configuration from an existing one:

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

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

To discard unsaved changes to a list view configuration:

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

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

To edit a saved list view's properties:

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

Saved list view configurations can be deleted.

To delete a saved list view configuration:

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

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

To access the Manage saved list views screen:

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

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

To change to one of your saved list view configurations:

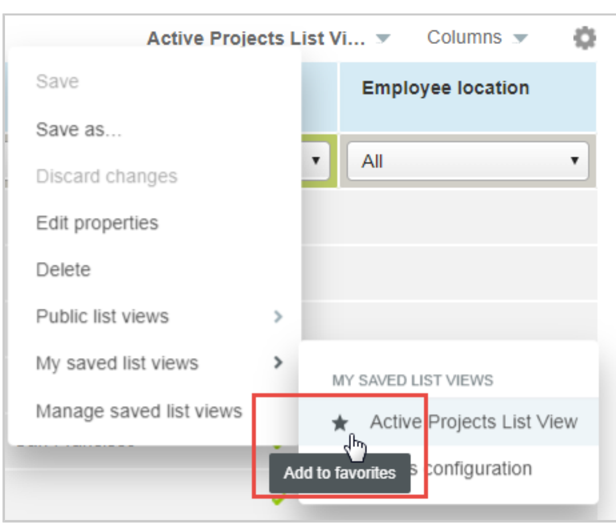
1. Click the icon next to the configuration name and click **My saved list views**. Saved list views icon.
2. Click the list view configuration you want to load.

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

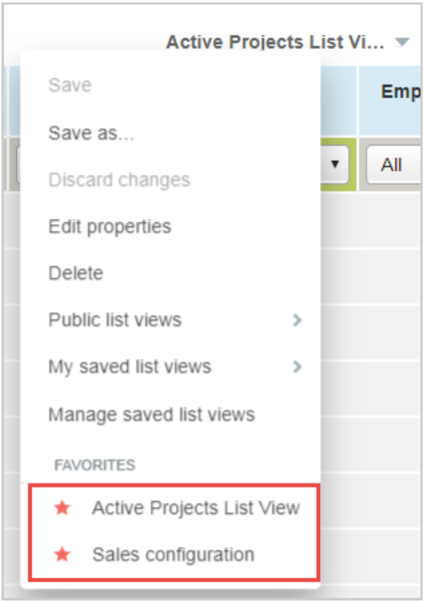
To change to one of your saved list view configurations from the Manage saved list views screen:

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

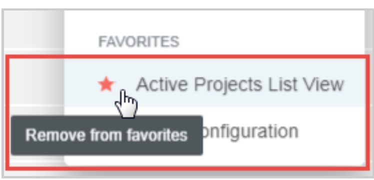
You can also set list view configurations as favorites from the **My saved list views** dropdown list. To select a favorite list view configuration, point to the configuration's name in the My saved list views dropdown list and click the star icon next to the name.



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



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



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

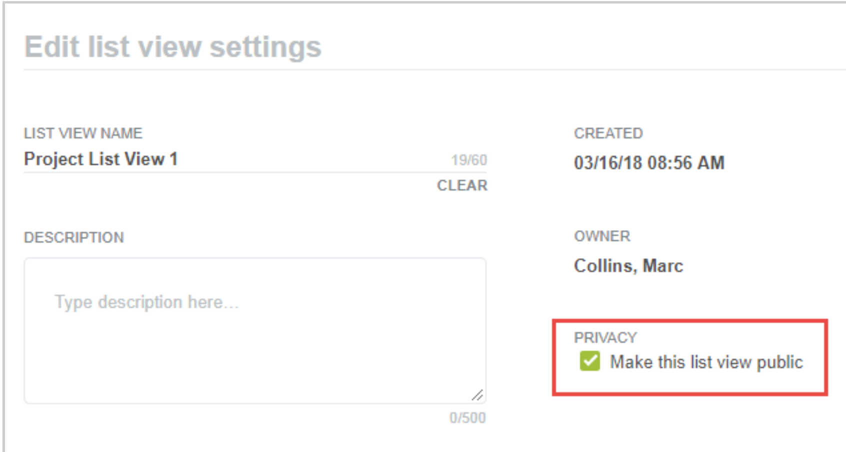
To assign the Create public list views user setting:

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

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

To make a list view configuration public:

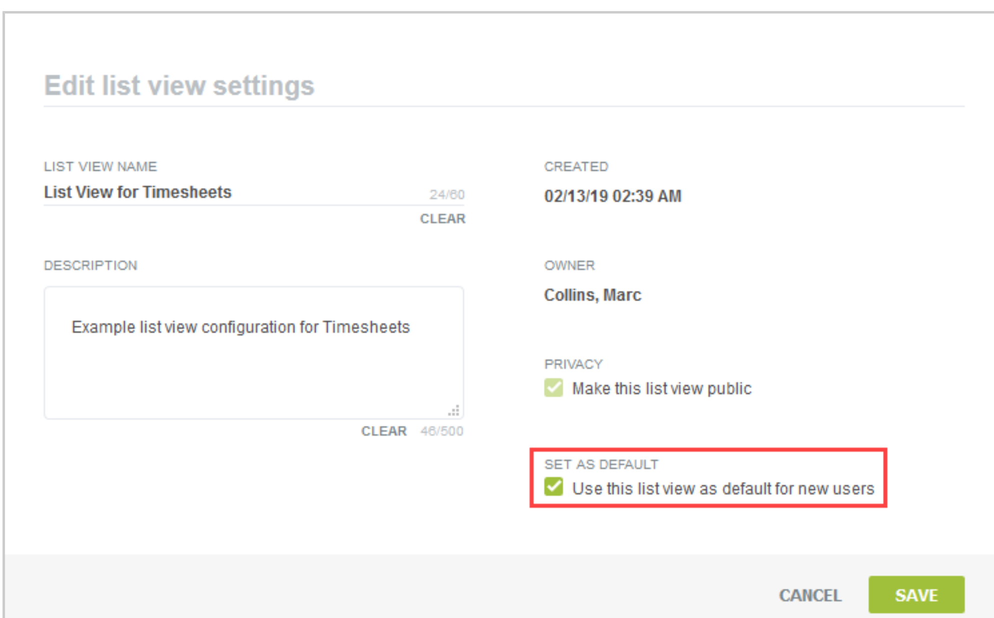
1. Go to the list view which contains the configuration you want to make public.
2. Click the icon next to the configuration name and click **Edit properties**.
3. Select the **Make this list view public** option.
4. Click **Save**.



Administrators and users with the **View and modify all saved list views** role permission can set a list view configuration as the default configuration for a list view. This default configuration will be applied to the list view for new users and for all users currently using the system default ("Untitled") configuration. All unsaved list view property changes will be lost for these users. If you change the default configuration, the new default configuration will only apply for all users using the previous default configuration if you delete the previous default or make it private. If you modify a default or public list view configuration, these changes will not apply for existing users unless they switch away from that list view configuration and back to it again.

To set a configuration as default

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



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

Viewing and Modifying All Saved List View Configurations for an Account

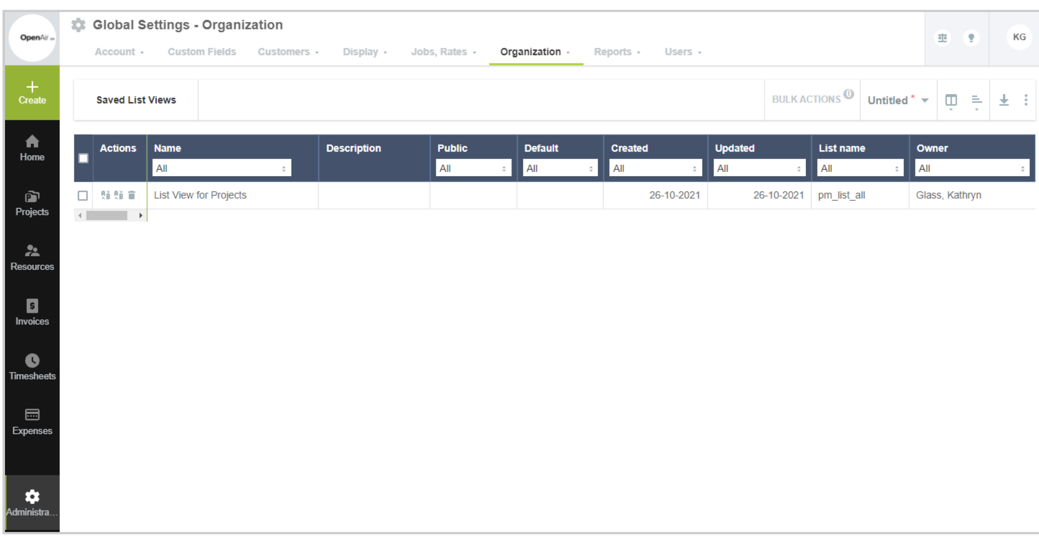
Administrators and users with the **View and modify all saved list views** role permission can access all saved list view configurations in an account from the Administration module. Users can also manage saved list views configurations from within list views. From here, users can also see who list view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

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

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

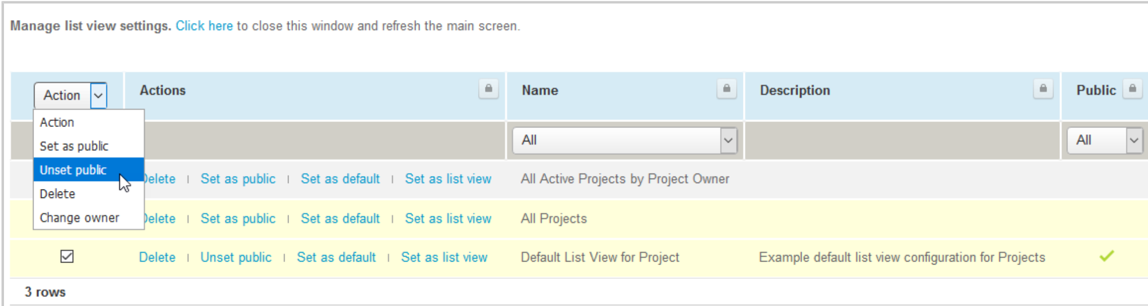
To manage all saved list view configurations in an account:

1. Go to Administration > Global Settings > Organization > Saved List Views.



To manage saved list view configurations from within list views:

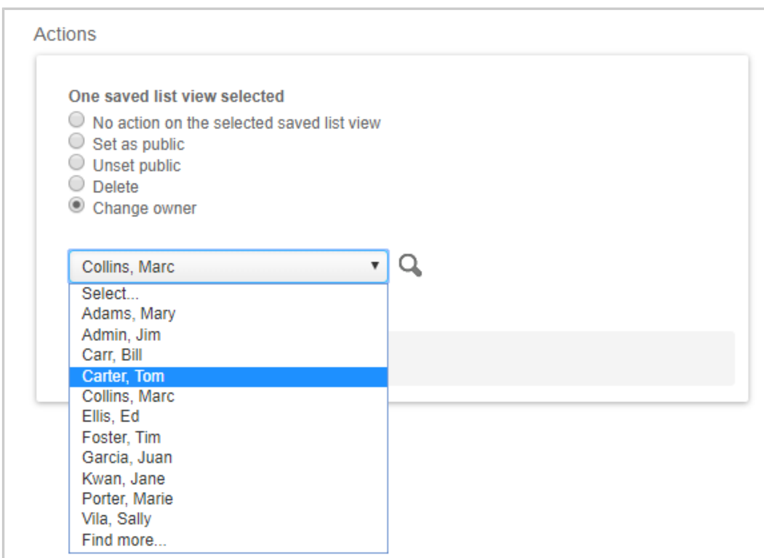
1. Go to the list view.
2. Click the icon next to the currently opened configuration name and click **Manage saved list views**.
3. The **Manage list view settings** window appears, containing a list of all saved configurations created by users in your account for the current list view.
4. Once you have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



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

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

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



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

Deleted Attachment Recovery

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

> **Note:** Records deleted 180 days or more ago are not generally available for recovery. Record retention periods may change in the future. For more information about deleted record retention, see Data Deletion.
>
> Recovered files count against your account's file storage limit.

To recover a deleted file to its original location:

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

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

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

To recover a deleted file to a workspace:

1. Go to Administration > Global Settings > Account and click **Restore deleted document/folders**.
2. In the **Run an Action** column, select the checkbox next to the file or files you want to recover.
3. In the **Run an Action** dropdown list, select **Restore deleted files**.

   Alternatively, you can click the **Undelete** button in the **Commands** column.
4. In the Actions dialog, select a Workspace to recover the deleted files to and click **OK**.
5. A dialog appears showing the status of the recovered files. Click the **Click here** link to close the window and refresh the list of deleted files.

To download a deleted file to your PC:

1. Go to Administration > Global Settings > Account and click **Restore deleted document/folders**.
2. In the **Run an Action** column, select the checkbox next to the file or files you want to recover.
3. In the **Run an Action** dropdown list, select **Download**.

   Alternatively, you can click the **Download** button in the **Commands** column.
4. Select a location to save the file to and save the file.

Form Default values

You can configure OpenAir to populate fields with default values when you create a record of either of the following types:

- Projects
- Tasks
- Timesheets
- Receipts
- Bookings
- Milestones
- Billing rules

- Time billing rule
- Revenue Recognition rules
  - Percent complete rule
  - As billed rule
  - Expenses rule
  - Fixed amount on date or milestone rule
  - Fixed amount on percent complete rule
  - Incurred vs. forecast rule
  - Time project billing rule

Values can be set for specific roles, so the role of each employee would dictate which values are defaulted. If the defaults apply globally, they may be applied to all roles. Defaults can be set for a variety of fields, including custom fields.

To set form default values:

1. Create a new form which supports form default values (see list above).
2. Click the link to **Set default form values** from the **Tips Button**.

   A copy of the form appears.
3. Select a role or accept the default of All.
4. Complete all fields for which default values are desired.
5. Click Save.

Use caution in setting default form values. You should not set default values for fields that are often changed during data entry. Setting too many default values can result in data entry errors because employees may forget to change key input data.

Form Permissions

You can use Form Permissions to control users' access and permission rights according to their role. You can control several elements of the form.

Some of the form permissions settings can be used for access control:

- **General permissions** — Control users' ability to save and delete records. See General Permissions.
- **Field settings** — Control users' permission rights for each field on the form. See Field Settings.
- **Hidden divider sections** — Control users access to specific groups of fields. See Hidden Divider Sections.
- **Permission rules** — Control users' permission right dynamically when certain conditions are met. See Permission Rules.

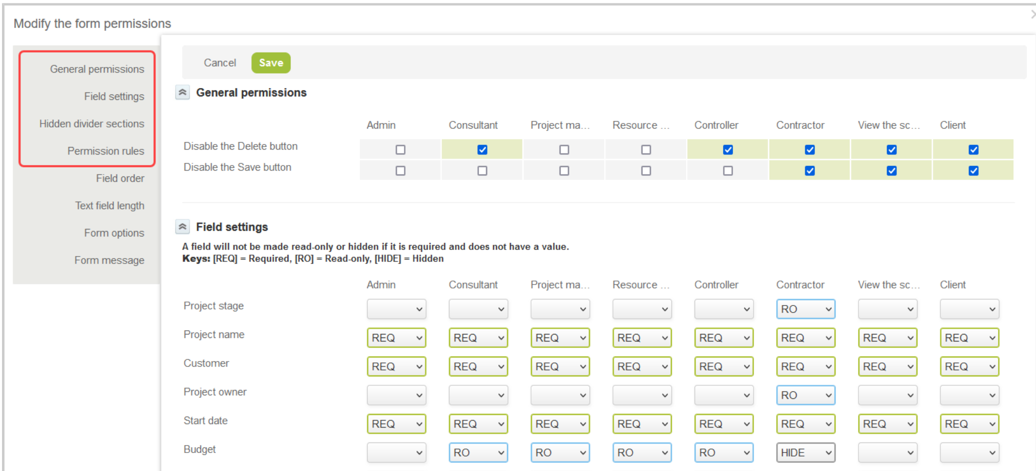
Other settings control usability, input validation and display options:

- **Field order** — Control the order fields appear on the form if the record type supports this feature. See Field Order.
- **Text field length** — Control the maximum length of text fields on a form. See Text Field Length.
- **Form options** — Control general form display options. See Form options.
- **Form message** — Add a custom message to the form. See Form message.

There are two ways to access form permissions:

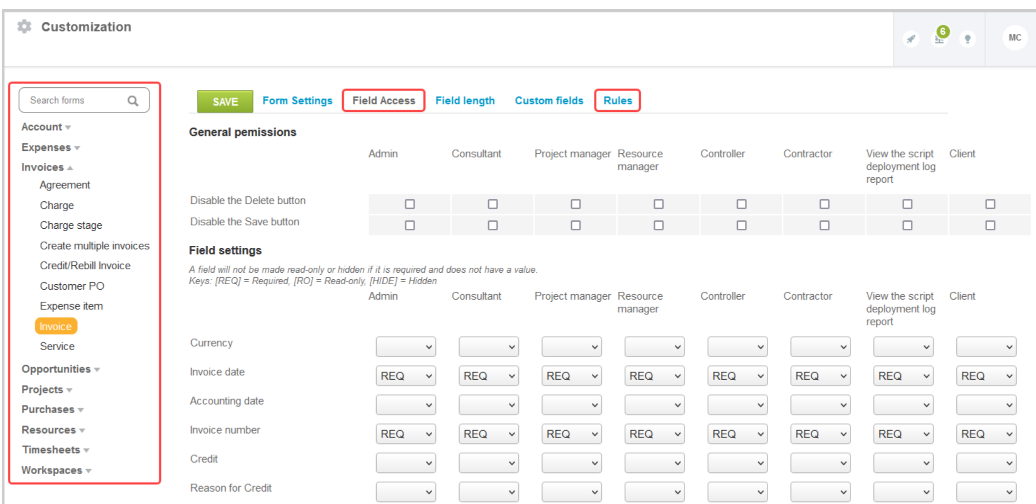
- Go to a record form, such as the Project Properties form, for example, click the Tips button, and click **Modify the form permissions**.

  The following screen appears. Scroll down or use the quick links on the left-hand side to configure the permission settings for this form.



- Go to Administration > Customization.

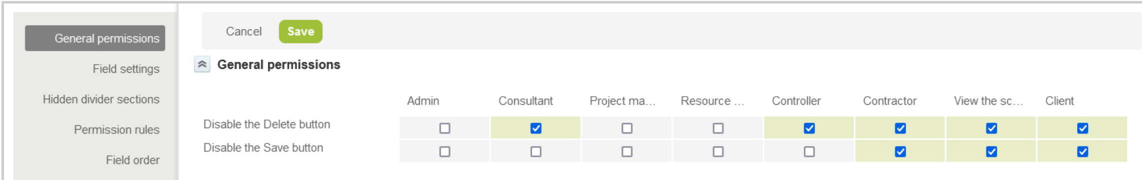
  The following screen appears. You can select a form on the left-hand side, then click on the **Field Access** tab to set the general permissions, field settings and hidden divider sections and on the **Rules** tab to set the permission rules.



Note: Form permission settings apply throughout the OpenAir web application as well as the OpenAir mobile applications and the OpenAir OffLine desktop application.

General Permissions

General permissions control users' ability to save and delete records. You may check the **Disable the Delete button** and **Disable the Save button** boxes for each role. General permissions settings are universal for the entity associated with the form.



Field Settings

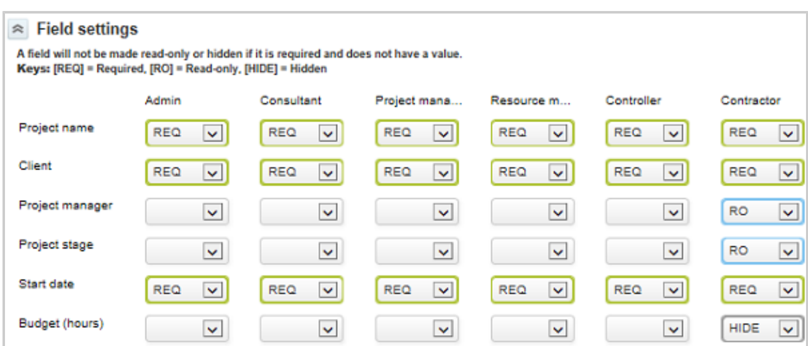
Field settings allow you to set users permission rights for each field on the form and for each role. On the form permission screen, each row corresponds to a field and each column corresponds to a role. You can select the permission rights given to a specific role over a specific field by selecting one of the following dropdown options:

- **REQ** — Required on form. Employee must enter a value.
- **RO** — Read Only on form. Entry is not allowed.
- **Hide** — Hide from form. Field does not display on form.
- **R-RO** — Read Only for system required fields.
- **R-Hide** — Hide from form for system required fields.

Field Settings are universal for the entity associated with the form.

Note: Field settings and switches override Permission Rules. If field settings or switch-based **field is required** options are used to control a set of fields, you cannot control those fields using permission rules.

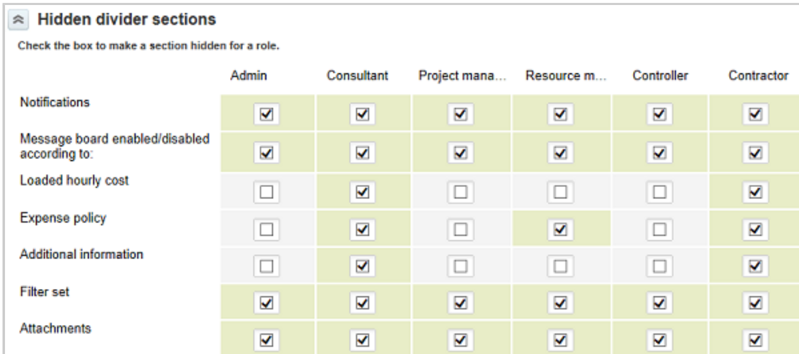
The "Ready for Recognition" box on Projects> Tasks (Pending/ Completed/ All) does not support form permissions as standard. To enable form permission support for the "Ready for Recognition" box, contact OpenAir Customer Support.



Hidden Divider Sections

Hidden divider sections control users' access to specific groups of fields. Check the box to hide a section of the entity form for users with a specific role. Sections are defined as a grouping of fields with a section title. Both the fields and the section title are hidden from users when the box is checked.

> **Note:** The Hidden divider sections settings are only available if the feature is enabled on your account. Contact OpenAir Customer Support and ask for the following feature: **Hide divider sections on Forms**.



Hidden divider sections

Check the box to make a section hidden for a role.

	Admin	Consultant	Project mana...	Resource m...	Controller	Contractor
Notifications	☑	☑	☑	☑	☑	☑
Message board enabled/disabled according to:	☑	☑	☑	☑	☑	☑
Loaded hourly cost	☐	☑	☐	☐	☐	☑
Expense policy	☐	☑	☐	☑	☐	☑
Additional information	☐	☑	☐	☐	☐	☑
Filter set	☑	☑	☑	☑	☑	☑
Attachments	☑	☑	☑	☑	☑	☑

Permission Rules

> **Note:** Form permission rules are available only if the feature is enabled on your account. Contact OpenAir Customer Support and ask for the following feature: **Form Permission Rules**.

Permission rules control permission rights dynamically when certain conditions are met. You can create new rules or edit existing rules and select the access permission for selected fields when one or all the conditions defined are met. The conditions can apply to any of the standard and custom fields on the entity form or to the user role. You can choose the access permission applicable to selected field from the following dropdown options.

- **Show** — Displays selected fields when the conditions are met.
- **Hide** — Hides selected fields when the conditions are met.
- **Read Only** — Marks selected fields as Read Only so that users cannot edit them when the conditions are met.
- **Required** — Marks the selected fields as required when the conditions are met.
- **Hide and Clear** — Hides the selected fields and clears any values in them when the conditions are met.
- **Limit values** — Allows you to limit which values are available to select in a field when the conditions are met. Selecting this rule displays the **Limit values** pick lists.
- **Hide buttons** — Hides selected buttons, such as “Save”, “Delete” or “Cancel”, when the conditions are met.

To create permission rules:

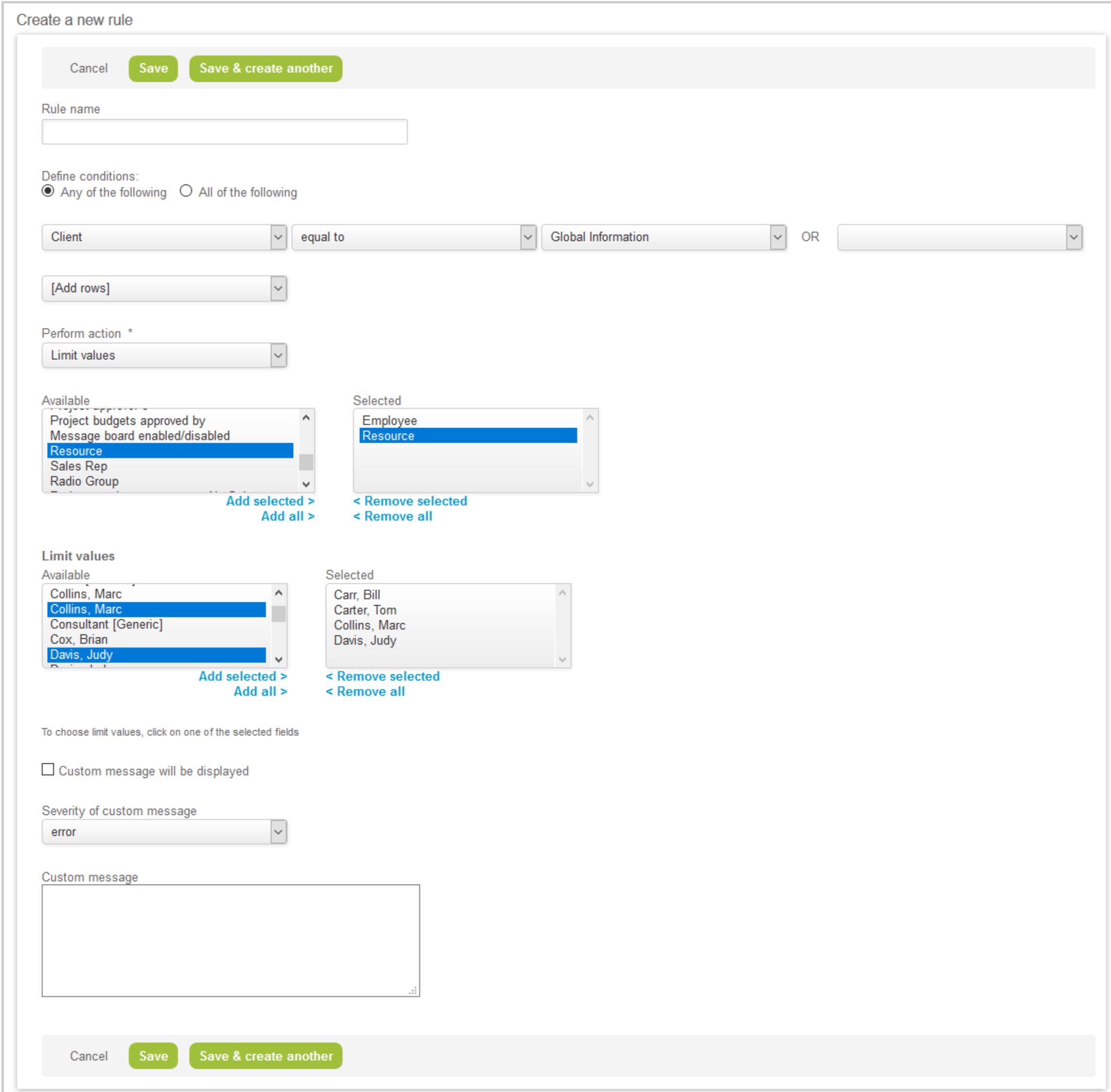
1. Access the **Create a new rule** form using either of the following methods:
   - Go to Administration > Customization, select an entity form, click the **Rules** tab and click the **Create** link.
   - Go to an “Edit entity” form (for example, the Project Properties form), click the **Modify the form permissions** link from the Tips menu, scroll down to **Permission rules** and click the **Create** link.

2. Enter a rule name.
3. Define the conditions for the rule. Multiple conditions may be required to create the rule.

> **Note:** Standard fields, custom fields, and employee roles are options within the conditions.

4. Click **Perform action** and select one of the dropdown options.
5. Select the fields or the button the action will apply to. Multiple fields or buttons may be selected.
6. If you selected the **Limit values** action, for each field selected:
   a. Click one of the selected fields.
   b. Select the values using the **Limit values** pick list to restrict the values displayed for this field.
7. Set a **Custom message** and the **Severity of custom message** as required. The severity setting determines the color scheme for the message to be displayed at the top of the form.
8. Click **Save**.

> **Note:** Field settings and switches override Permission Rules. If field settings or switch-based **field is required** options are used to control a set of fields, you cannot control those fields using permission rules. However, those fields can be included in any of the rule conditions.



Field Order

You can create different form layout, and change the order in which standard and custom fields and standard and custom section dividers appear for each form layout, and apply the form layout to selected user roles. Depending on their role, users will see a different form layout when they view, add or modify a record, for record types that support this feature.

> **Note:** You can also set the position of custom fields to appear after any standard or custom field or add a custom form section when creating or modifying custom fields. See Custom Field Position and Custom Field Position.

To create a form layout and assign it to specific roles

1. Access the **Field order** form using either of the following methods:
   - Go to Administration > Customization, select an entity form, click the **Field order** tab.

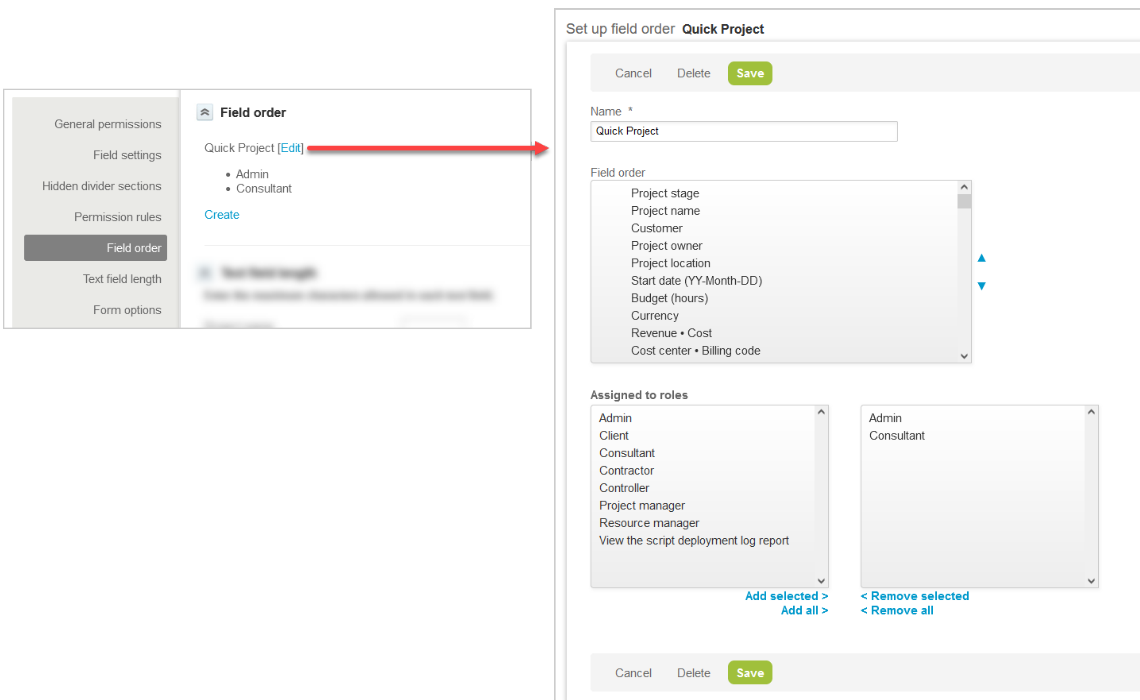
- Go to a record form (for example, the Project Properties form), click the **Modify the form permissions** link from the Tips menu, and scroll down to **Field order**.

2. Click **Create**.

> **Note:** To modify an existing layout, click **Edit** next to the layout name.

3. Enter a **Name** for the custom layout.
4. In the **Field order** list, click the field or section divider you want to move, and use the arrows pointing up or down to move the field or section divider up or down.

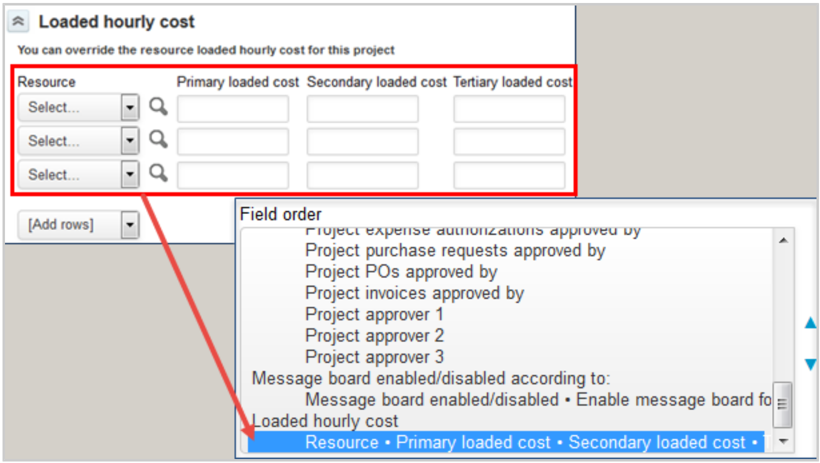
   You can move multiple fields and section dividers at the same time. To do so, hold Ctrl or Shift and click the fields and section dividers you want to select, then use the arrows to move the fields and section dividers.
5. Under Assigned to roles, select the roles you want to assign this form layout to.
6. Click **Save**.



Note that some fields can only be moved together as a group, for example:

- Project Task
  - "ID" and "Task name"
  - "Priority", "Part of Phase", and "Project task type"
  - "Planned hours" and "Percent complete"
  - "Start date" and "End date"
  - "Employee", "Hours remaining", and "Override (hours)"
- Expense Report
  - "Tracking number" and "Currency"
  - "Date" and "Accounting date"

Compound objects with individual access settings are moved together as a block.



Text Field Length

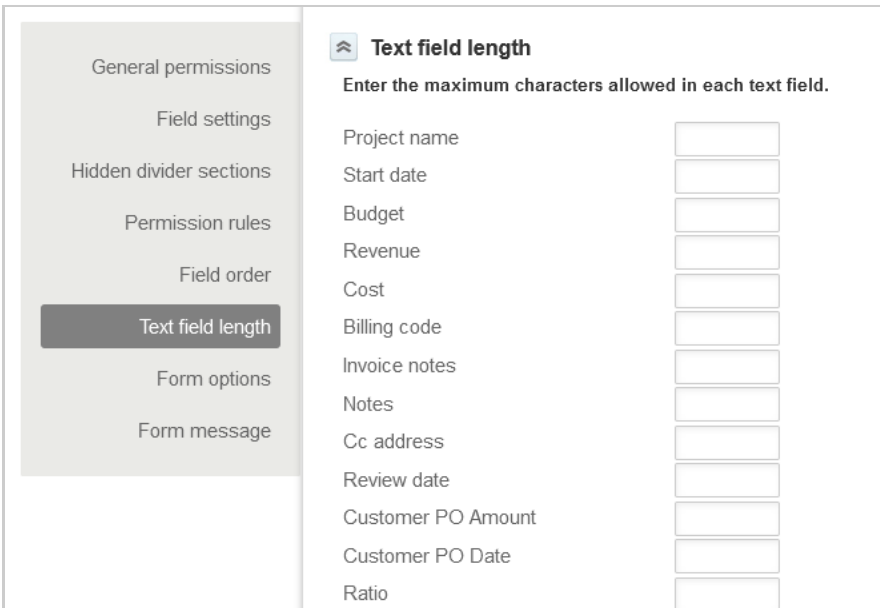
This feature shows you the list of fields that can have a maximum character length set, and lets you to set the maximum lengths. If you leave a field blank then the maximum database length for the field is applied.

> **Note:** If you specify a maximum length greater than the length allowed in the database then your maximum value will be ignored and the database maximum for the field applied.

The new text field length maximum is applied when creating a new form and modifying an existing form.

> **Note:** If you have an existing value that is longer than the new **Text field length** then the existing length of the value will be treated as the maximum length while the form is being modified.

> **Note:** The Text field length sections settings are only available if the feature is enabled on your account. Contact OpenAir Customer Support and ask for the following feature: **Maximum Text Field Length Form Permission Settings**.



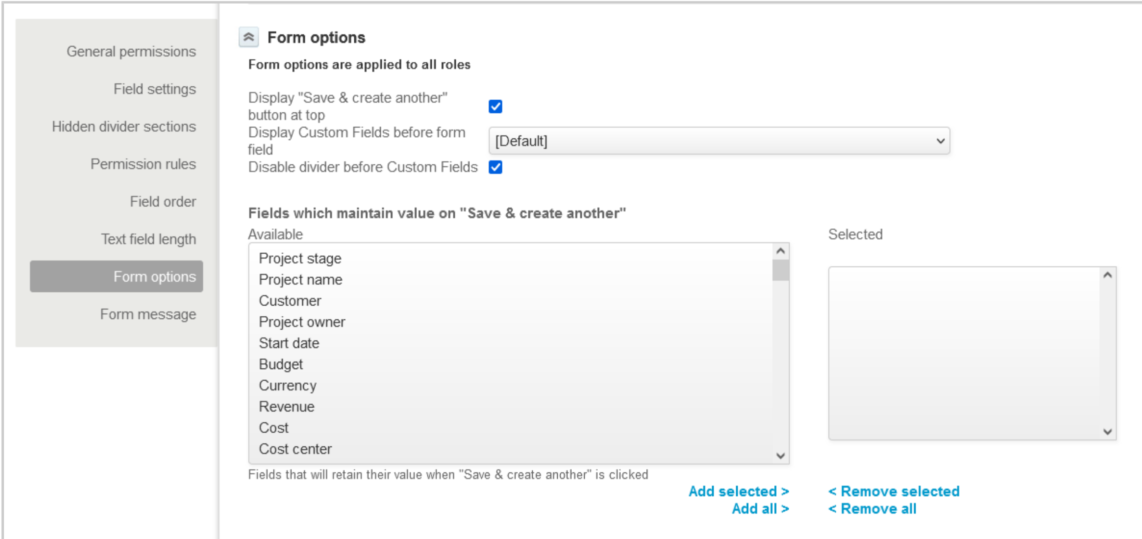
Form options

The following form level permissions can be set:

- **Display "Save & create another" button at top** — Select this option to display the **SAVE & CREATE ANOTHER** button when create a new entity.

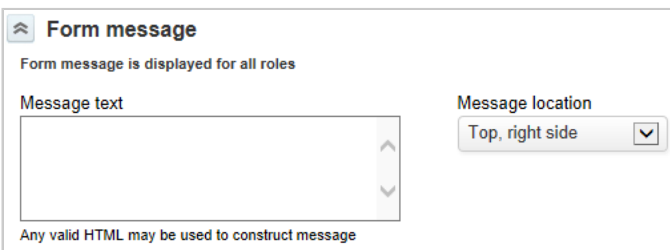
  > **Note:** This behavior can be overridden by the **Add "Save & create another" button to the top right of forms** company switch under Administration > Global Settings > [Display] Interface : Display.

- **Display Custom Fields before form field** — This option determines where on the form the custom fields will be positioned in relation to the standard form fields. The **[Default]** setting will place the custom fields at the bottom of the form. You can also select **[Top]** or specify a field to position the custom fields after.
- **Disable divider before Custom Fields** — This option will disable the displaying of the divider.
- **Fields which maintain value on "Save & create another — This option allows you to select the fields that will be copied forward when using the "Save & create another" feature.**



Form message

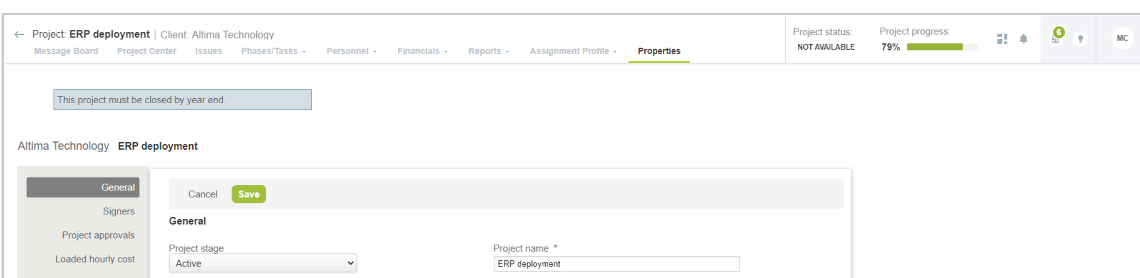
You can define messages to be shown on the form whenever users go to the form.



Note: You can also show:

- Custom messages on forms depending on certain conditions using permission rules on Modify form permissions. See Permission Rules for details.
- Confirmation, warning and error messages on forms using form scripts. See the help topics NSOA.form.confirmation(message) and NSOA.form.error(field, message) under OpenAir User Scripting Guide.

Form messages can be displayed either at the top of the form or to the right of the form at the top.



OpenAir

The message can be simple text or may use HTML formatting.

- Example of HTML formatting

  This project must be closed by year end.

```
<p style="font-family:arial;color:green;font-size:20px;">This project must be closed by year end.</p>
```

- Example of an information message box

  This project must be closed by year end.

```
<span class="message blockMessage informationMessage">This project must be closed by year end.</span>
```

- Example of a warning message box

  This project must be closed by year end.

```
<span class="message blockMessage warningMessage">This project must be closed by year end.</span>
```

- Example of an error message box

  This project must be closed by year end.

```
<span class="message blockMessage errorMessage">This project must be closed by year end.</span>
```

> **Note:** This will format the text to look like an error message. It will not stop the form from being saved.

> **Important:** You should not use this feature to run client side script to modify form behavior.

Notifications

Account administrator can control the email notification messages that OpenAir sends automatically to inform users about certain record events.

The Custom Email Notifications optional feature lets account administrators configure when and to whom OpenAir sends email notification messages, as well as the message content. Custom email notifications let you set up separate notification email for a supported record type and event combination. You can set up OpenAir to send notification email every time the event occurs for a record of that type, or when the event occurs and the record meets specified conditions.

For example, you can set up notifications to inform users when a transaction is submitted and awaiting the user's approval, when a transaction is approved or rejected, or when a transaction is submitted or approved by proxy. You can also set up notifications to inform users when a booking is created, modified, or deleted and meet criteria such as a specific booking type or Customer: Project, or when the project stage is set to a certain value on a new or existing project.

Account administrators can:

- Enable custom email notifications for selected OpenAir modules (applications) only. When enabled for a module, a Notifications list view becomes available in the application settings for that module. See Enabling Custom Email Notifications.

- Go to Administration > Application Settings > [*Select a module*] > Notifications, and add custom notifications for supported types of records and supported events on these records. See Setting Up Custom Email Notifications.

> **Note:** The Custom Email Notifications optional feature is often enabled for new OpenAir accounts as it offers more control and flexibility for email notifications.
>
> You should enable the Custom Email Notifications feature and disable standard email notifications and email templates, if you are still using the latter on your account.

When the Custom Email Notifications optional feature is not enabled, OpenAir sends standard email notifications when transactions are submitted or approved. OpenAir also sends email notifications for other record events. Account administrators can:

- Create email templates for standard email notifications. See Email Templates.
- Disable standard email notifications and email templates. See Disabling Standard Email Notifications and Email Templates.

Enabling Custom Email Notifications

You can enable custom email notifications for selected OpenAir modules (applications) only.

To enable custom email notifications, contact OpenAir Customer Support, request the Custom Email Notifications optional feature, and specify for which modules you want to enable custom email notifications.

The following table lists the applications, record types and events for each record types that support custom email notifications.

> **Note:** You should disable standard email notifications and email templates for the same modules and record types as you enable custom email notifications for. See Disabling Standard Email Notifications and Email Templates.

Application	Record type	Event
Expenses	Authorization	- Submitted - Approval requested - Approved - Rejected - Unapproved
	Expense report	- Submitted - Approval requested - Approved - Rejected - Line rejected - Unapproved - Reimbursed
Invoices	Invoice Revenue container	- Submitted - Approval requested - Approved - Rejected - Unapproved

Application	Record type	Event
Opportunities	Proposal	■ Submitted ■ Approval requested ■ Approved ■ Rejected ■ Unapproved
Projects	Project	■ Created ■ Modified ■ Deleted
	Issue	
	Task	
	Project budget	■ Submitted ■ Approval requested ■ Approved ■ Rejected
Purchases	PO	■ Submitted ■ Approval requested ■ Approved ■ Rejected ■ Unapproved
	Purchase requests	■ Submitted ■ Approval requested ■ Approved ■ Rejected ■ Unapproved
Resources	Booking	■ Created ■ Modified ■ Deleted ■ Submitted ■ Approval requested ■ Approved ■ Rejected ■ Unapproved
	Booking request	■ Submitted ■ Approval requested ■ Approved ■ Rejected ■ Unapproved
	Resource request	■ Finalize ■ Partially fulfilled ■ Completed ■ Canceled

Application	Record type	Event
	Resource request queue	▪ Partially fulfilled ▪ Completed ▪ Canceled
	Resource profile	▪ Submitted ▪ Approved ▪ Rejected
Timesheets	Timesheet	▪ Submitted ▪ Approval requested ▪ Approved ▪ Rejected ▪ Line rejected ▪ Unapproved
	Time off request	▪ Submitted ▪ Approval requested ▪ Approved ▪ Rejected ▪ Unapproved

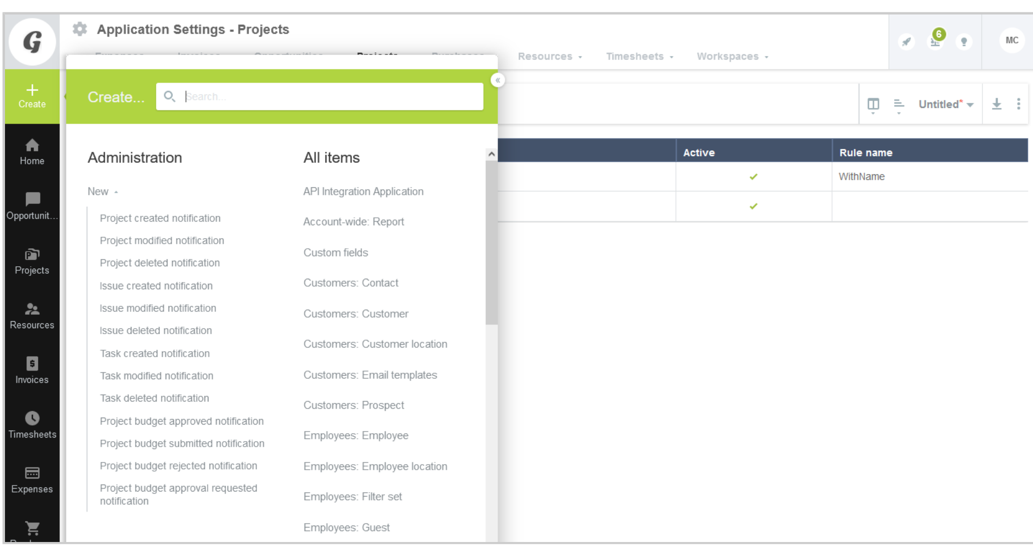
Setting Up Custom Email Notifications

After you enable custom email notifications for a module, a Notifications list view becomes available in the application settings for that module. You can review and modify existing custom email notifications or you can add new ones.

To set up custom email notifications:

1. Go to Administration > Application Settings > [*Select a module*] > Notifications.

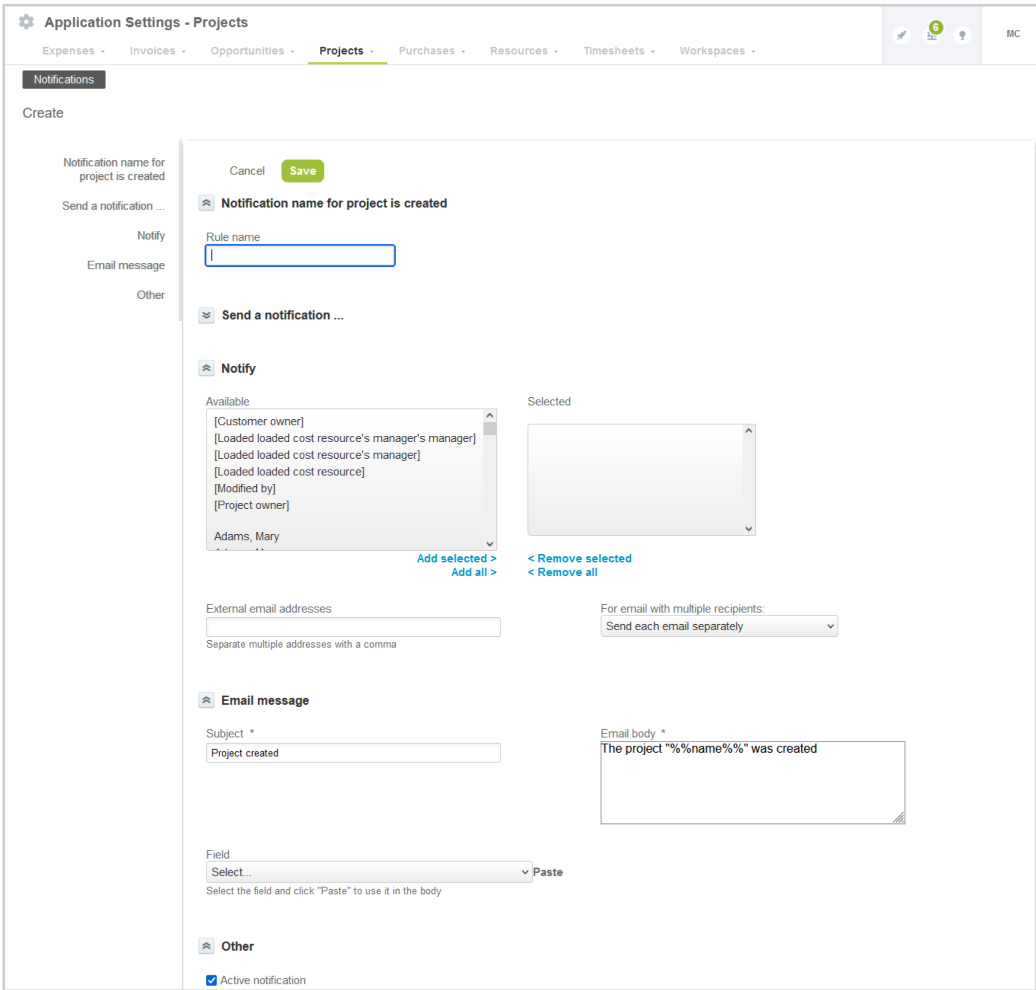
   The list view of notifications set up for record types associated with the selected module appears.



 OpenAir

2. Do one of the following:
   - To modify an existing notification, click `<record type> <event>` (for example, `Project created`) under the Event column.
   - To add a new notification, click the Create button, then click the option corresponding to the record type and the event you would like to set up notifications for. The Create menu options also include the record type and the event for record types in the module: `<record type> <event> notification` (for example, `Project deleted notification`).

   The Notification form appears.



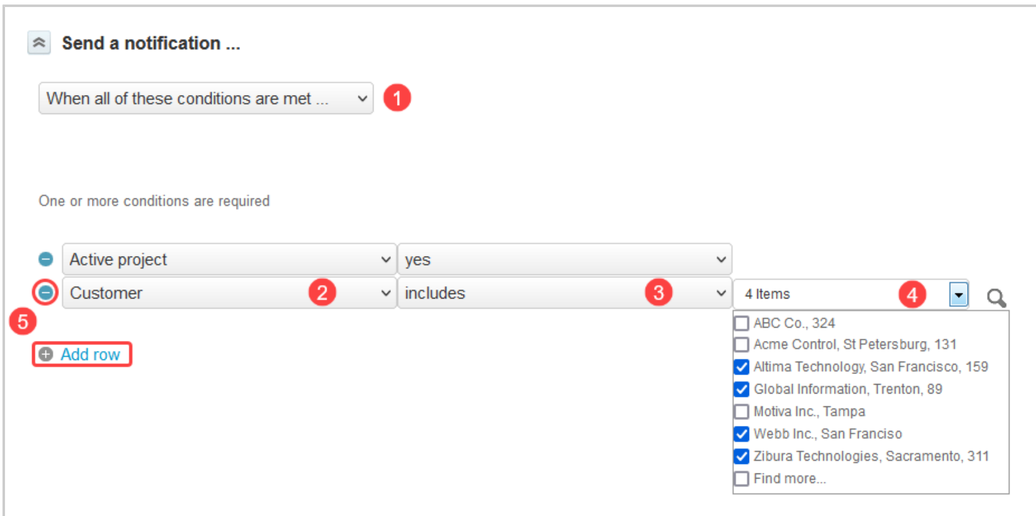
3. (Optional) Enter a **Rule name**.
4. Under **Send a Notification** select when the notification should be sent.

1 Click the dropdown field under **Send a Notification ...** and select one of the available options.

You can set up the notification to be sent: only To do so,

- Every time the event occurs for every record of this type — To do so, select **When any <record type> is <event>**.
- When one or multiple conditions are met — To do so:
  - Select **When all of these conditions are met** if you want to send a notification when the event occurs and the record meets all specified conditions (`AND` logical operator).

	▫ Select **When one of these conditions is met** if you want to send a notification when the event occurs and the record meets at least one of the specified conditions (OR logical operator). If you select either of the latter two options, the form shows additional fields to let you define the conditions.
2	Click the dropdown box further left in the condition row to select a field.
3	Click the middle dropdown box to select a comparison operator from the available options.
4	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. Dropdown lists with a large number of values support advanced search.
5	Click **Add row** to add a new condition. Click the Delete row icon next to a row to delete that condition.



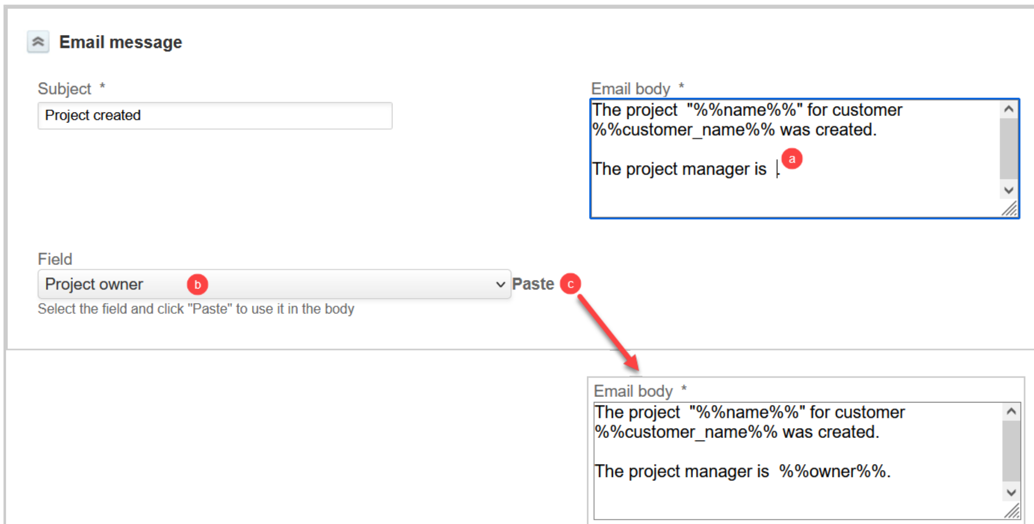
5. Under **Notify**, select who should receive the notifications. Do one of the following:
   - Select one or multiple named employees.
   - Select one or multiple dynamic values (metavalues) to send notifications to an employee determined automatically depending on the record information, or who created or modified the record. For example, if you select the metavalue `[Customer owner]`, notifications are sent to the employee who owns the customer associated with the record, or if you select the metavalue `[Submitter's manager]`, notifications are sent to the manager of the employee who submitted the transaction record for approval.
   - Enter one or multiple **External email addresses**, separated by a comma, to send notifications to recipients who do not have a user record on your OpenAir account.
6. **For email with multiple recipients**, select whether to send one single email with all recipients in the To line, or send separate email messages to each recipient for the same notification.
7. Under **Email message**, enter a **Subject** line.
8. Enter the text to include in the **Email body**.

   You can insert field variables in the body of the notification email. Field variables will be replaced by current field values on the record when the notification email about that record is sent. To insert field variables:

   a. Place your cursor where you want to insert the value in the **Email body** text.
   b. Select the **Field** from the dropdown list.
   c. Click **Paste**.

The field variable appears at the cursor location in the **Email body** text.

> **Note:** The notation for field variables is the database name for the field between double percent characters. If you know the name of the field in the OpenAir database (<field_name>), you can enter field variables directly in the text using the following notation: %%<field_name>%%.



9. Under **Other**, check the **Active notification** box to enable the notification. OpenAir sends the custom email notification only if this box is checked. You can clear this box at any time if you want to disable the custom email notification.
10. For approval requested notifications, check the **Do not send if auto-approved** box if you do not want to send approval requested email notification when the transaction is approved automatically. If the **<Transaction > approved by** is set to the metavalue `[Self approver]`, for example, you may not want to send approval requested notifications.

Disabling Standard Email Notifications and Email Templates

Standard email notifications and email templates can be disabled for selected types of records. To do so, contact OpenAir Customer Support, and specify which standard functionality you want disabled, and for which record types.

The following table lists the functionality you can disable, and the record types the functionality applies to.

> **Note:** You should disable standard email notifications and email templates for the same modules and record types as you enable custom email notifications for. See Enabling Custom Email Notifications.
>
> Email templates are only used for standard email notifications. When disabling standard notifications, you should disable email templates for the same record types, if email templates are supported for the record type.
>
> Standard email notification options for several project-related events are controlled on the project properties form. Use form permissions to control access to the Notifications form section or to individual options within that section. See Form Permissions.

Functionality	Record Type
Standard email notification (Transaction submission and approval process)	■ Authorization ■ Booking ■ Booking request ■ Expense report ■ Invoice ■ Proposal ■ PO ■ Purchase request ■ Revenue container ■ Time off request ■ Timesheet **Note:** It is not possible to disable email notifications sent when a timesheet or expense report is awaiting your approval. You can create a rule in your email client to funnel approval notification emails into a separate folder if the volume of email is a concern.
Standard email notification (Record created, updated, or deleted)	■ Booking ■ Project task, phase, or milestone
Standard email notification (Assignment or status change)	Issue
Standard email notification (Project manager change)	Project
Standard email notification (Project stage change / notifications controlled at the project stage level)	■ Project Stage ■ Project
Email templates	■ Authorization ■ Booking ■ Booking request ■ Invoice

Functionality	Record Type
	■ Issue ■ Project ■ Project task, phase, or milestone ■ Revenue container ■ Time off request

Data Deletion

Users with appropriate role permissions can delete transactions or records using the OpenAir web application or OpenAir APIs.

> **Note:** Only transactions or records which are not associated with another transaction or a child record can be deleted, unless those associated transactions or records themselves have been deleted.
>
> A deleted transaction or record cannot be recovered. A new transaction or a record needs to be created to replace the deleted one.
>
> Access to OpenAir APIs is a licensed add-on and must be purchased separately. To enable access to OpenAir APIs for your account, contact your OpenAir account manager or OpenAir Professional Services.

When a user deletes a record in OpenAir, the record is flagged as deleted. The record is not removed immediately from the OpenAir database.

Deleted records are retained in the OpenAir database for a minimum of 180 days. Older deleted records, that is, records marked as deleted and last updated 180 or more days ago, are removed permanently from the database according to a routine schedule.

- Starting February 24, 2024 on sandbox accounts, and March 9, 2024 on production accounts, the removal process will run every week on the weekend. Each deleted record will remain available in the OpenAir database for a minimum of 180 days and up to one to two weeks after this minimum retention period.
- Previously, the removal process ran two times a year during major OpenAir release windows. Each deleted record remained available in the OpenAir database for a minimum of 180 days and up to one year after the record was marked as deleted.

Deleted records cannot be removed permanently or modified by your company's account administrators during the retention period.

Account administrators may request the expedited purge of specific records flagged as deleted for regulatory compliance. See the help topic Requesting Purge of Deleted Records or Audit Trail Data.

Following the expiration or termination of the OpenAir Service, data is deleted from all live and non-live environments after six months of the account cancellation date. See also Data Control.

Timesheets

Overview

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

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

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

Refer to the following help topics:

- Timesheets
- Creating, Editing, and Deleting Timesheets
- Approval Processes

  See Approval Routing under Global Features.

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

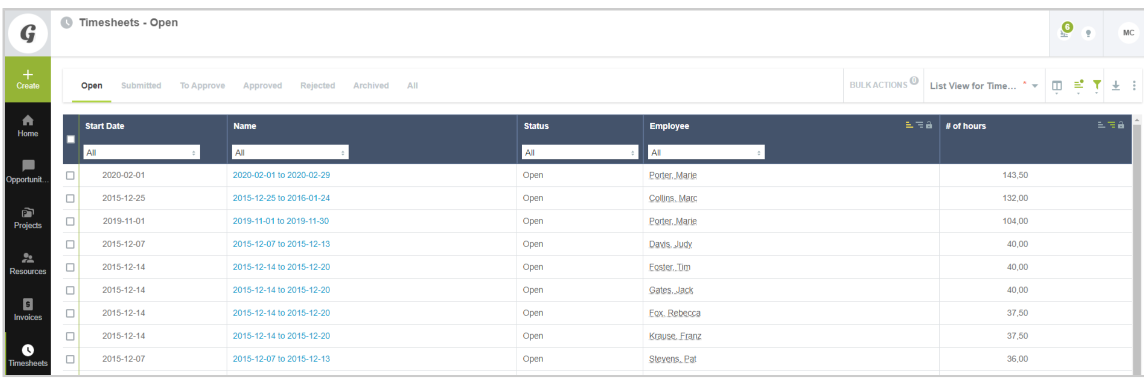
- Service
- Time Types
- Notifications

  See Notifications under Global Features.

- Timesheet Report Layout

- Timesheet Rules
- Payroll Types
- Time Off Request Layout
- Leave Accrual Rules
- Run Leave Accruals
- Leave Accrual Form - Timesheets Application
- Alerts
- Other Settings
- Frequently Asked Questions (FAQs)

Timesheets



The Timesheets application is where employees record their time against customer or internal projects. Employees can enter time against Customers, Customer : Project, and other combinations such as Tasks and Services. There are a number of other additional data elements that may be required based on your company's configuration such as Time types or Payroll types.

> **Note:** You can review and modify your company's terminology definitions in Global Settings. See Interface: Terminology.

Creating, Editing, and Deleting Timesheets

New timesheets can be created from anywhere within NetSuite OpenAir.

Creating a New Timesheet

1. Click the **Create** button in the upper-left corner of the screen. If you are already within the Timesheets application, select **Timesheets (New...)** or **Timesheets (New clone...)**. If you are anywhere outside of the Timesheets application, click the **Create** button and in the right half of the dialog box, select either **Timesheets: Timesheet, New** or **Timesheets: Timesheet, New clone**.
   - Selecting **New...** creates a completely new timesheet.

- Selecting **New clone...** creates a new timesheet which is a copy of an already-existing timesheet.

2. If you selected **New...**, set the timesheet starting date, add notes, allow timesheet overlapping, and add attachments to your timesheet.

   If you selected **New clone...**, set the timesheet starting date, the timesheet to duplicate, and choose how to populate the hours cells. As with **New...**, you can add notes and attachments to the timesheet.
3. Click the **Save** button. Your new timesheet will appear on the screen.
4. Fill in the Customer: Project, task, and hours worked for each day.
   - You can add a description and notes for each task by clicking the Note/Description icon next to each hours cell.
   - Clicking the icon pins the timesheet hours cells so that if your window is re-sized or there is a long list of days, as many cells as possible stay visible on screen.
5. When finished, click either **Save** to save the report or **Save & submit** to save the timesheet AND submit it for approval.

Editing an Existing Timesheet

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

   Note: Your role may prevent you from editing timesheets which do not belong to you.
2. Click on the timesheet name of the timesheet you would like to edit. The timesheet will open up.
3. Make your changes to the timesheet.
4. When finished, click either **Save** to save the report or **Save & submit** to save the timesheet AND submit it for approval.

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

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

Editing a Rejected Timesheet

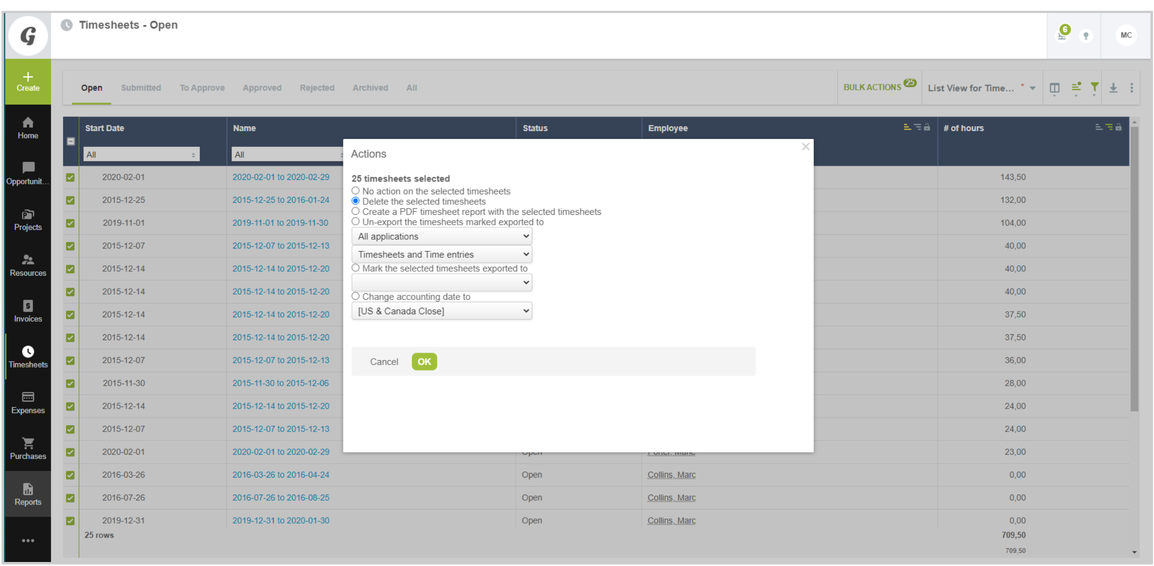
1. If your timesheet approver rejects a timesheet or individual time entries in a timesheet, the timesheet or time entries are returned to you. To find them, navigate to Timesheets > Timesheets > Rejected.
2. Click the timesheet or time entries you would like to edit. A detailed report of the rejected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

Deleting a Timesheet

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

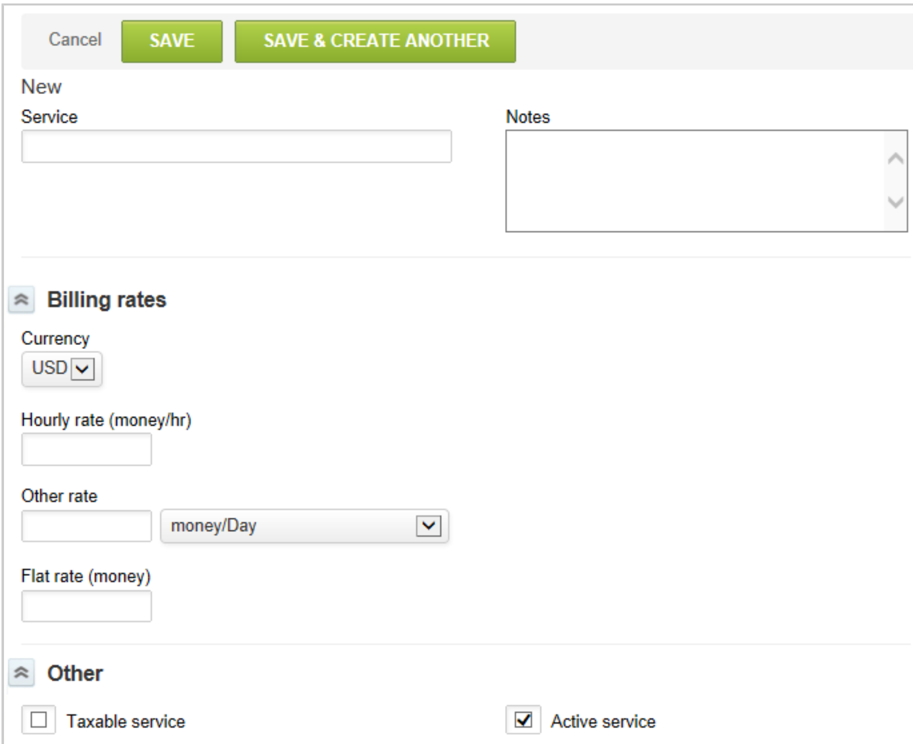
Bulk Deleting Timesheets

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



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

Service



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

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

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

To create a Service:

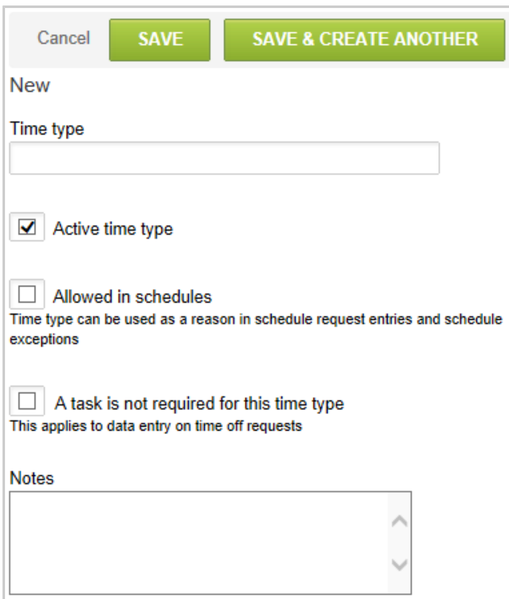
1. Go to Administration > Application Settings > Timesheets > Services.
2. Select **New Service** from the **Create Button**.
3. Enter the Service name.

4. Under Billing rates, select the Currency if you are using multi-currency in your environment. Choose how you would like to charge for this service: Hourly rate, Other rate (specified amount per time period), or Flat rate (for the entire service-fixed fee).

> **Note:** You do not have to complete the billing rates section unless you have chosen to get billing rate from either Services or Services-Customer. See Billing Rates.

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

Time Types



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

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

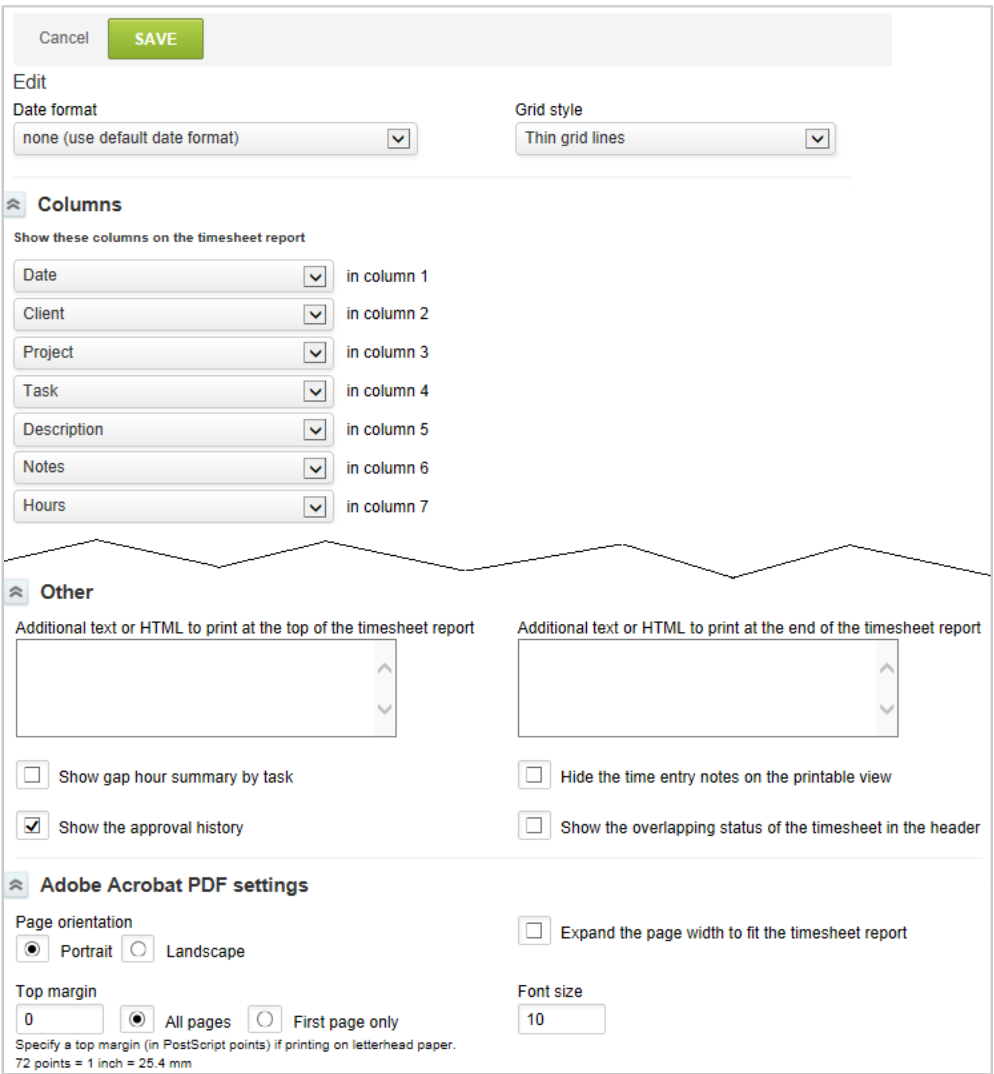
To create a Time Type:

1. Go to Administration > Application Settings > Timesheets > Time types.
2. Select **New Time type** from the **Create Button**.
3. Enter the Time type name.
4. Select the check box for **Allowed in schedules** if this time type is an option to use when entering time off requests and schedule exceptions.

5. Select the check box for **A task is not required for this time type** if this time type enables employees to enter time without designating a task as they might normally be required to do.
6. Notes may be added to describe this time type, if desired.

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

Timesheet Report Layout



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

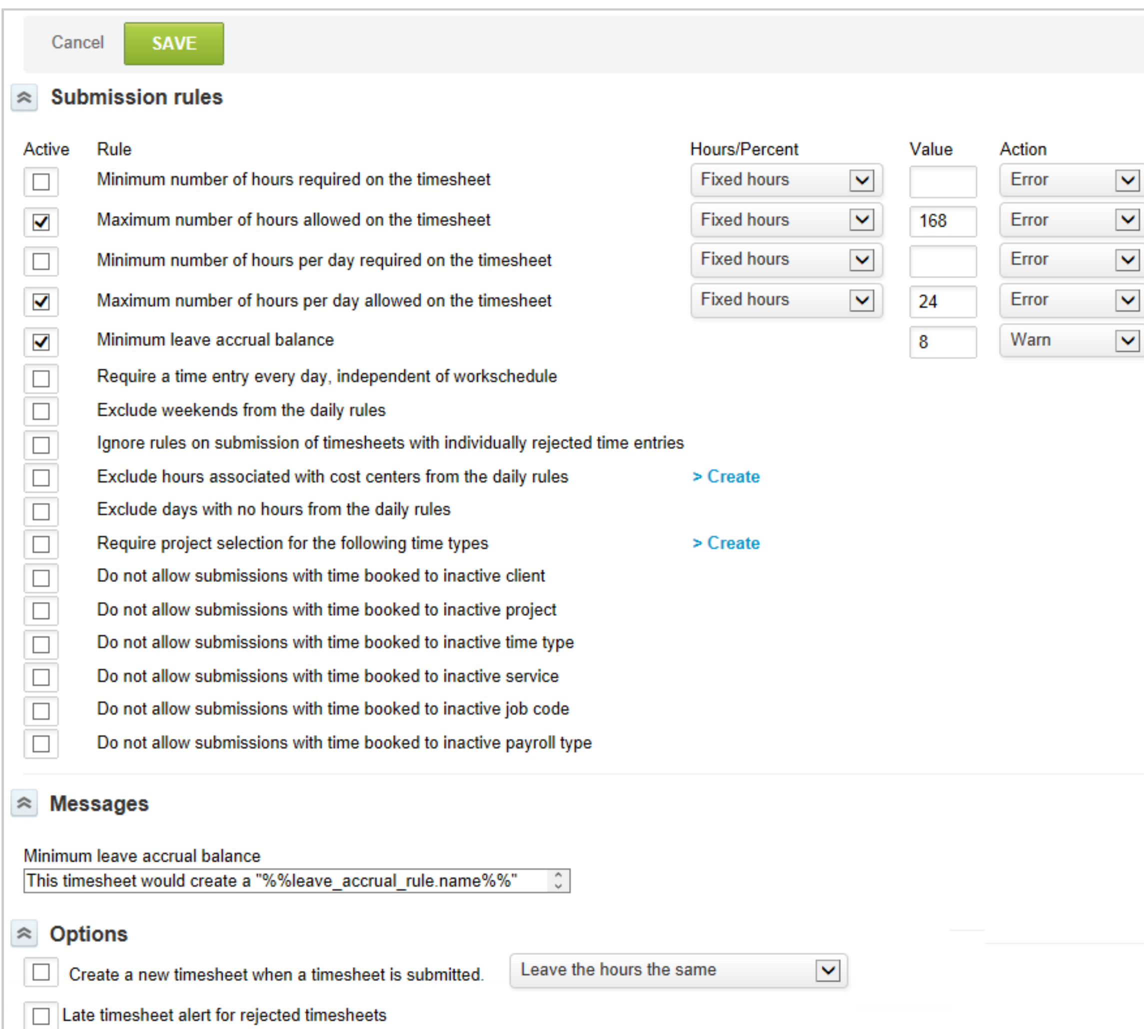
To access and modify the Timesheet report layout:

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

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

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

Timesheet Rules



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

- Minimum number of hours required on the timesheet
- Maximum number of hours allowed on the timesheet
- Minimum number of hours per day required on the timesheet
- Maximum number of hours per day allowed on the timesheet
- Minimum leave accrual balance, and Exclude weekends from the daily rules

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

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

Other options include:

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

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

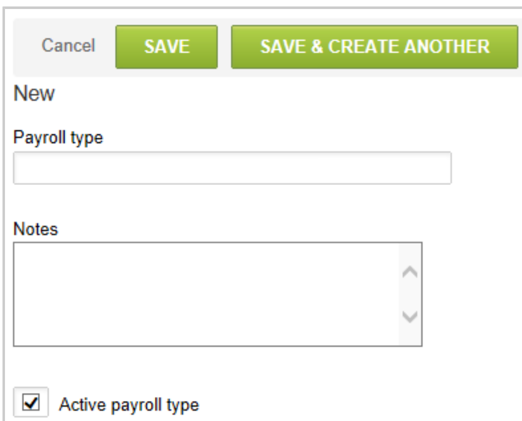
To create or modify the Timesheet Rules:

1. Go to Administration > Application Settings > Timesheets > Timesheet rules.
2. The Messages area provides a standard message to the employee when time entries for leave exceed the minimum balance specified in the Minimum leave accrual balance in the section above.

Fields identified with %% are standard OpenAir database fields. Additional fields may be added by looking up the field format. Email templates provide an user unterface to help interpret the field format. See Email Templates.

3. An option to Create a new timesheet when a timesheet is submitted is also available. The options accompanying this feature are the same provided to employees when they choose to copy a timesheet. You should select the option most aligned with your business. For example, Clear the hours is a popular selection.
4. There is also a check box that controls whether or not an alert for rejected timesheets is included in the late timesheet alert notifications.

Payroll Types

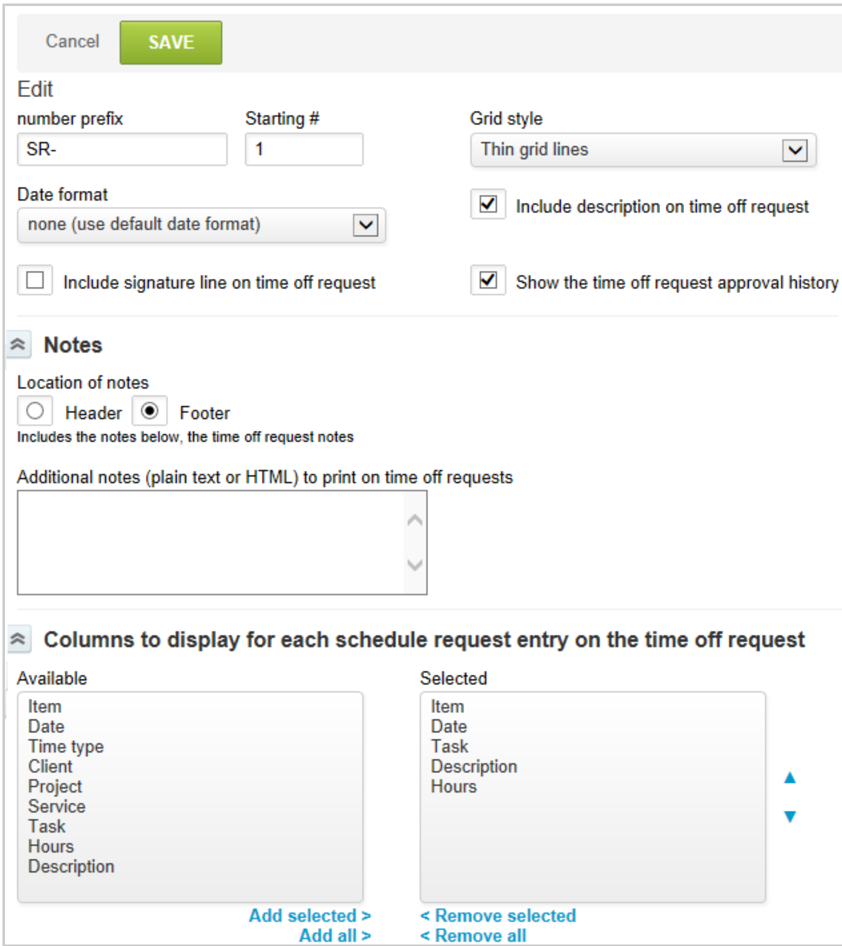


OpenAir offers the capability of creating Payroll types for use in the Timesheet application. This is an additional attribute that can be input on the time entry. The general use is to determine regular or overtime work when time types are used for a different purpose. Payroll types have more limited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

To create a Payroll Type:

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

Time Off Request Layout



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

To access and modify the Time off request layout:

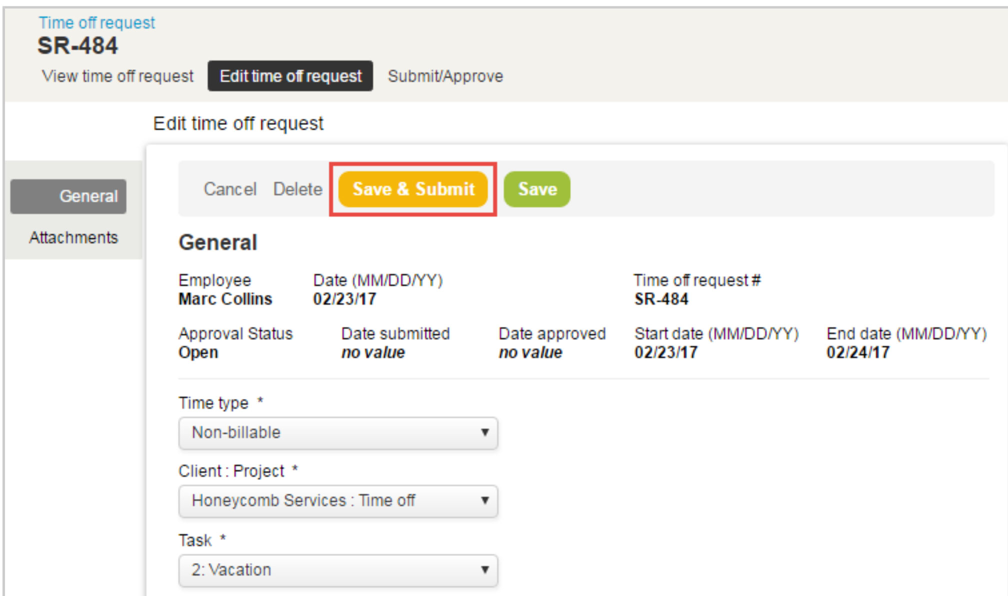
1. Go to Administration > Application Settings > Timesheets > Time off request layout.
2. Select the Grid style using the drop-down list as well as the Date formal.
3. Select the desired check boxes that determine whether to include a description on time off request, signature line on the time off request,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

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

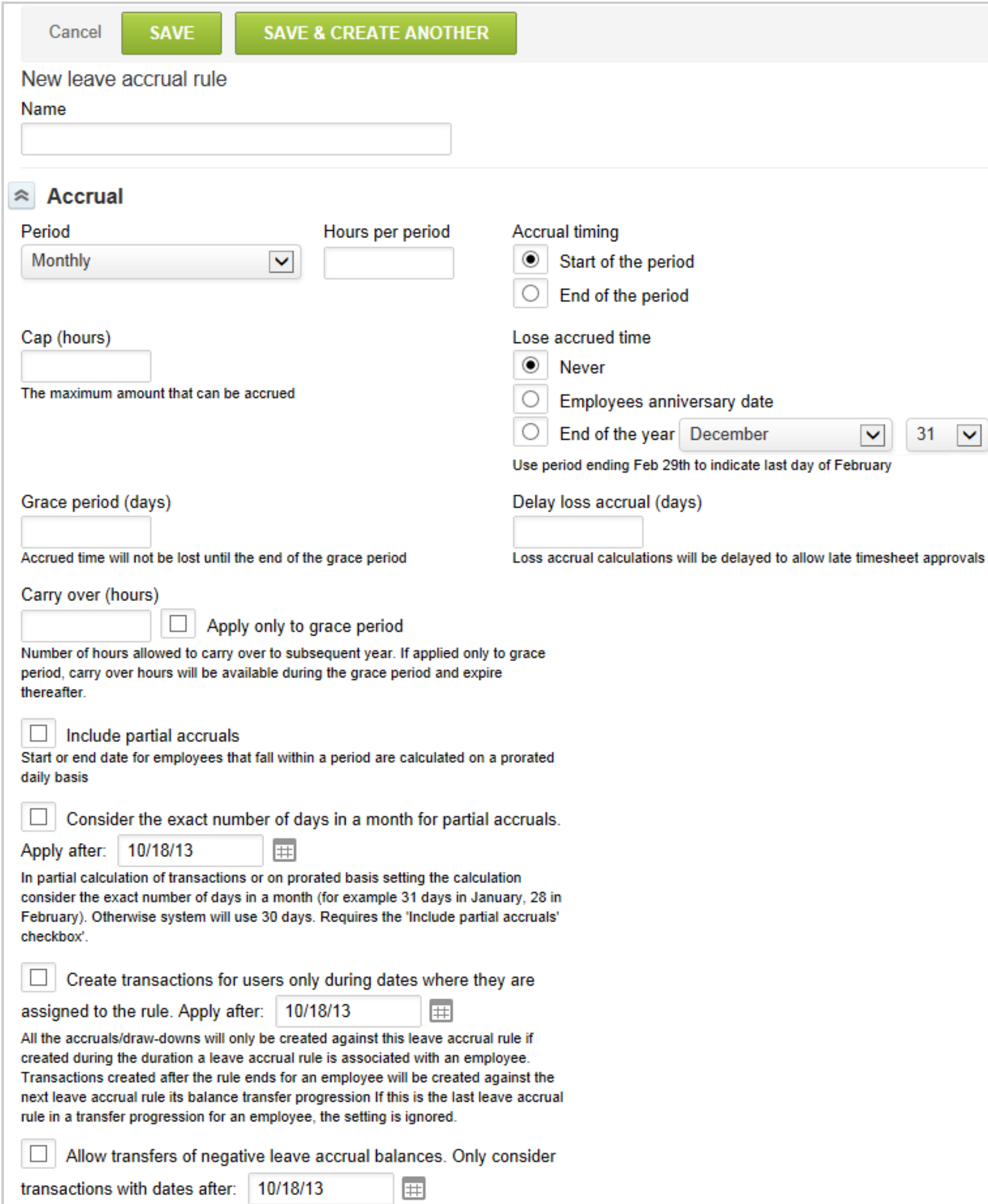
Add a Save & Submit Button on Time Off Requests

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

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



Leave Accrual Rules



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

To create a Leave accrual rule:

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

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

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

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

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

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

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

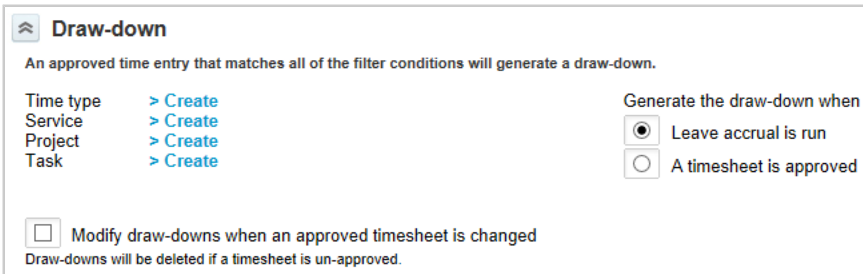
   Closed accrual leave periods can be created to prevent leave accrual transactions from being drawn-down against a closed period.
   - All the accruals/draw-downs will only be created against this leave accrual rule if created during the duration a leave accrual rule is associated with an employee.
   - Transactions created after the rule ends for an employee will be created against the next leave accrual rule its balance transfer progression. If this is the last leave accrual rule in a transfer progression for an employee, the setting is ignored.

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

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

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

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



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

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

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

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

12. Click Save.

To associate rules to an employee:

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

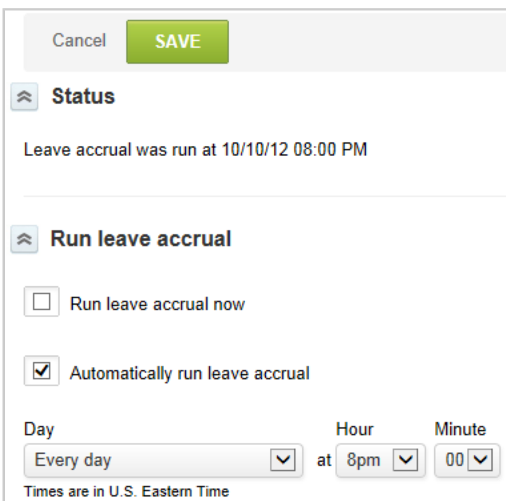
Note: Editing existing leave accrual rules may affect existing historical balances of your employees. If you need to change your policies, we recommend that you contact OpenAir Customer Support or OpenAir Professional Services.

Run Leave Accruals

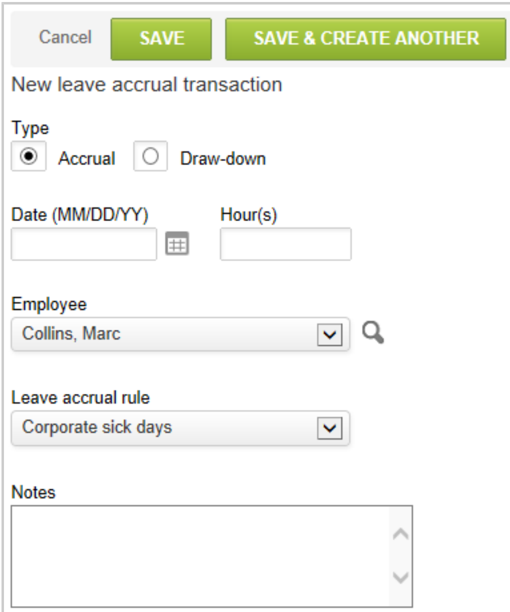
The Run leave accrual form provides you, the account administrator, with the ability to run the defined Leave Accrual rules on demand or have them scheduled to be run on a regular basis. When you set up the leave accrual rules, you determine how running leave accruals impacts leave accrual balances.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

To Run leave accruals:

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



Leave Accrual Form - Timesheets Application



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

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

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

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

To create a New leave accrual transaction:

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

Alerts

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

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

To create a timesheet alert:

1. Go to Administration > Application Settings > Timesheets > Alerts.
2. Select the type of alert you want to create from **Create Button**. The corresponding alert form will open.
3. Name the alert.
4. Under Alert runs on, select the day and time when the Alert should run.
5. Under Rule, define the appropriate selection rules for why the employees would receive an alert and which employees will receive alerts.
6. Use Email notification, define the email sender, subject and text, and decide whether to copy other employees on the alert email.

   > **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`. See also Email Settings.

7. Add notes, as desired. These notes do not appear anywhere in the alert; they are for informational purposes, such as remembering why the alert was created.
8. Select Active alert to make this alert active.
9. Click Save.

Other Settings

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

To access the Timesheet Other settings:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Require a customer/project on time entries: If you have displayed Customer : Project (and possibly customers only depending on the show customer name option) for entry on the timesheet, this option will allow you to make this field required for all employees. This option is dependent on the **Show the customer/project drop-down on the main worksheet** option being active. If the show customer/ project option is not active, this option has no impact.

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

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

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

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

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

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

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

> **Important:** If the Access All Tasks optional feature is enabled for your account, employees have access to, and can enter time against all tasks in the project if they are booked to an open task in this project. See the help topic Access All Tasks.

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

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

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

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

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

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

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

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

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

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

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

Do not allow timesheet submission if time is booked to an inactive option: Employees entering time against Customer : Project (or Customers, and possibly at the task level), are provided a drop-down list of these items based on the timesheet options, such as displaying only Customer : Project with open tasks. This option prevents the submission of a timesheet if the employee was able to view a Customer : Project task when the timesheet was created, but later the Customer : Project was inactivated before the timesheet is completed and submitted. If this option was not selected and the Customer : Project has been inactivate during the span between timesheet creation and submission, time is allowed to be entered against an inactive project since the timesheet was already in progress.

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

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

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

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

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

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

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

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

Require a customer/project on time off requests: If you have implemented project-based time tracking and activated time off requests, this option lets you make Customer : Project selection required for all employees. Such a Customer : Project selection is typically something like [Company Name] : PTO project.

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

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

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

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

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

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

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

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

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

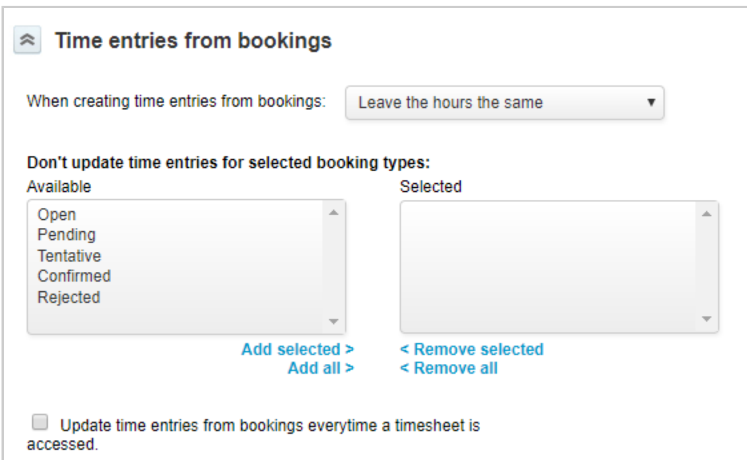
Allow modification and deletion of schedule exceptions created automatically from an approved time off request: Schedule exceptions are entries in the employee's personal work schedule or calendar that identify special work schedule situations such as holidays or vacation. Allowing the schedule exceptions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

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

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

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

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



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

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

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

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

Disable overlapping timesheets: The necessity for overlapping timesheets is typically driven by the need to enter either a correcting timesheet to move hours between projects or to enter two timesheets within a particular week (For example, your company is on a monthly accounting calendar but you have weekly timesheet submissions. You can create two timesheets for the timesheet period, one ending on the last day of the calendar month and the other beginning on the first day of the next calendar month). Disabling timesheet overlapping ensures unique timesheets for each timesheet period.

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

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

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

Sort timesheets alphabetically by customer and project: As time entries are entered on the timesheet and submitted, the Customer : Project entries are sorted alphabetically within each day instead of the order they are entered.

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

Enable start and end time entry on timesheets: Check this box to let employees specify the times of the day when they worked on a particular project. When checked:

- Check **Enable start and end time entry on timesheets** box on the employee demographic form to enable the functionality for an employee.
- Check the **Require start and end times in time entries** box on the employee demographic form if your company requires that the employee specifies start and end times for each time entry. If you check this box, use form permissions to restrict the employee from clearing the **Enable start and end time entry on timesheets** box in their Personal Settings.
- When the functionality is enabled for an employee:
  - You can click the Notes icon and enter a start time and end time for each time entry.

    > **Note:** The Start and End Time feature lets employees 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 the employee worked on a particular project or task.
    >
    > This is different from the Day Time Card feature which lets employees enter a time card for a full working day with a start time, end time and break start and end times, without providing a breakdown of time worked on each project in the day.

  - Users can add a start time column and end time column to the time entry list view.

> **Important:** You should not check the **Enable start and end time entry on timesheets** box when the feature **Use Days Instead of Hours for All Time Entries** is enabled.
>
> After you enable **Enable start and end time entry on timesheets**, when users enter a start time and end time in OpenAir, the duration is calculated in hours and not converted to days.

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

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

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

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

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

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

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

Frequently Asked Questions (FAQs)

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

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

Why would I use Services on timesheets?

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

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

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

What are ways to restrict entry of time types?

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

When should a time type be used?

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

Expenses

Overview

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

Refer to the following help topics:

- Expenses
- Approval Processes

  See Approval Routing under Global Features.

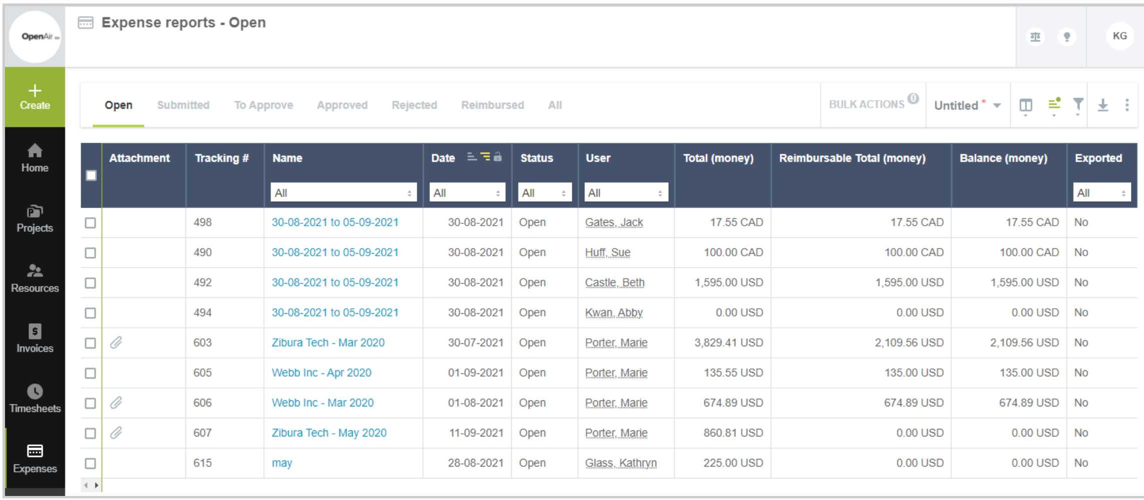
  > **Note:** You can access the full list of approval processes defined for your account from any of the Expenses, Invoices, Opportunities, Purchases, Resources, and Timesheets application settings. The same approval process may be used for different transaction types across different OpenAir modules.

- Expense Items
- Expense Report Layout
- Vehicles
- Vendors
- Payment Types
- Authorizations
- Notifications

  See Notifications under Global Features.

- Alerts
- Other Settings
- Expense Attachment Deletion Wizard

Expenses

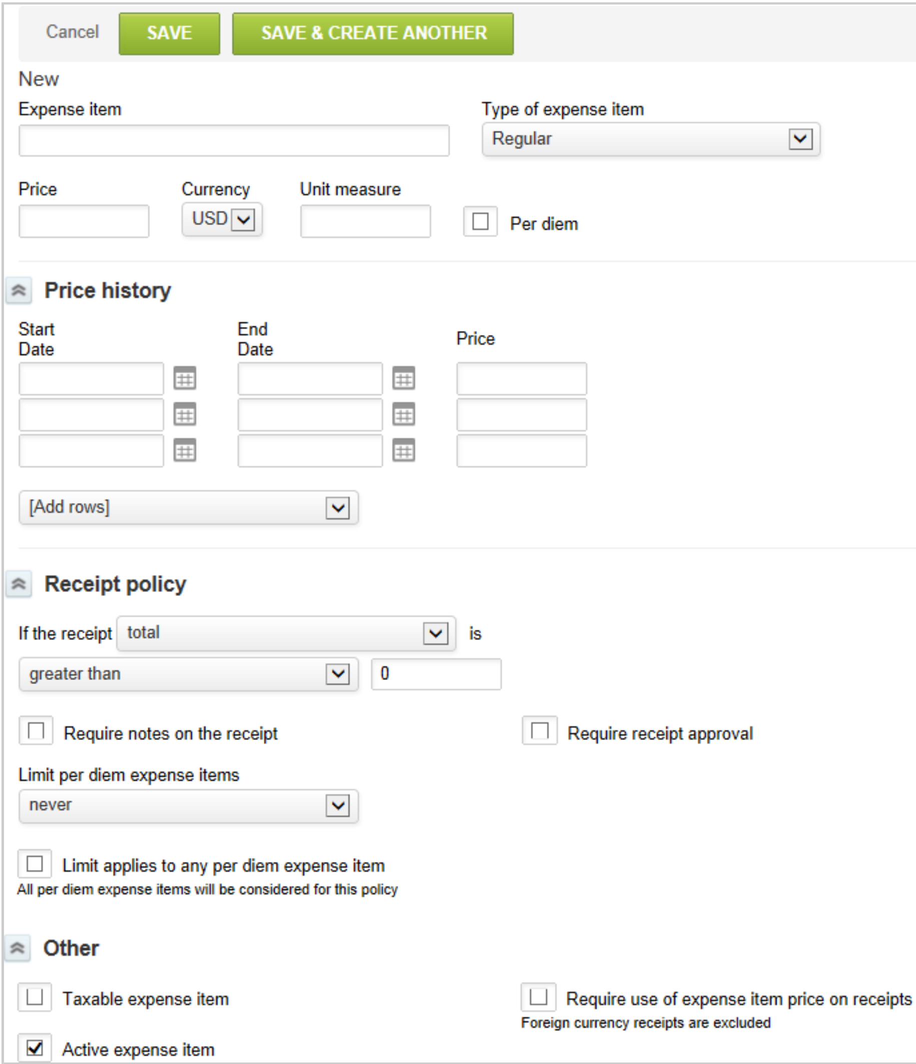


The Expenses application permits the entry of incurred business expenses by employees as well as the ability to receive pre-approval of future expenses using Authorizations, if this feature has been enabled. The entry of expenses by employees themselves or on their behalf by the company lets Accounts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

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

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

Expense Items



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

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

To create an Expense Item:

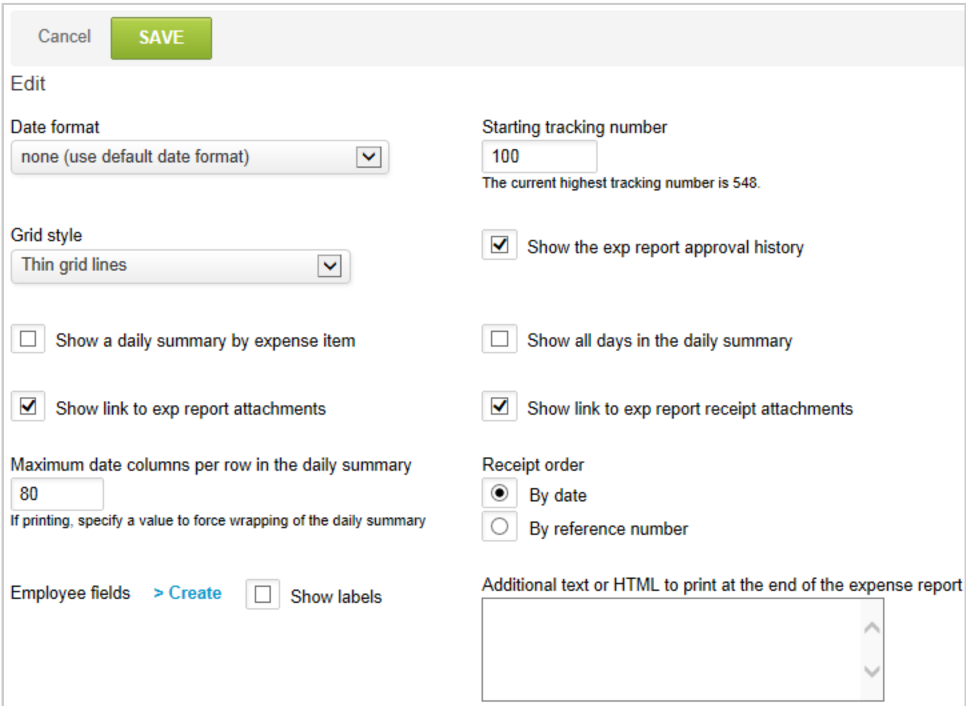
1. Go to Administration > Application Settings > Expenses > Expense Items.
2. Select **New Expense item** from the **Create Button**.
3. Enter the Expense item name and select the Type of expense item, either regular or mileage. A regular receipt is the default receipt form when a new expense report is created. A mileage receipt is a slightly modified form allowing for mileage rates.

Note: The following provides further explanation.

- Mileage expense items may also be set as a regular receipt type since the form provides the ability to enter a price per unit, or in this case, $$ per Mile. If you are not using the Vehicle feature that requires the mileage receipt type, you may opt to set up all expense items to the regular receipt type and avoid end-employee confusion.
- Each expense item may have a standard price or the field may be left blank for the employee to enter the price on the receipt form itself. Any time a price, rate, or other financial information is stated in OpenAir, you also have the ability to set the currency value if multi-currency is enabled.
- A Unit Measure indicates the unit for the price and can be any unit you desire.
- A Per Diem check box is available to classify this type of expense and it must follow a particular per diem policy.

4. The next section in the form relates to Receipt policy, which controls actions based on the individual receipt and expense item entered into an expense report. You are able to enter parameters for the receipt and select whether to require notes or approval based on the settings. For per diem expense items, you are able to choose how to limit their use within your OpenAir account.
5. Under the Other section, you may enter text to be used on proposals in the Opportunities application.
6. Check the Taxable expense item check box if tax may be charged to the customer for this expense item. A tax location may optionally be entered by the employee per receipt if this setting is activated. See Tax Locations and Tax Options.
7. If you would like the expense item price to be required on the receipt, select the check box. If your cost center rules for receipts include expense item cost center values, then you need to optionally set the cost center on expense items as well. The cost center field only displays if you have configured the cost center Receipt rules to involve expense items. See Cost Centers.
8. There is an option to control viewing of expense items using Filter Sets. Expense items are one of the data access control objects within a filter set definition. See Filter Sets Overview.

Expense Report Layout



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

To access and modify the Expense report layout:

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

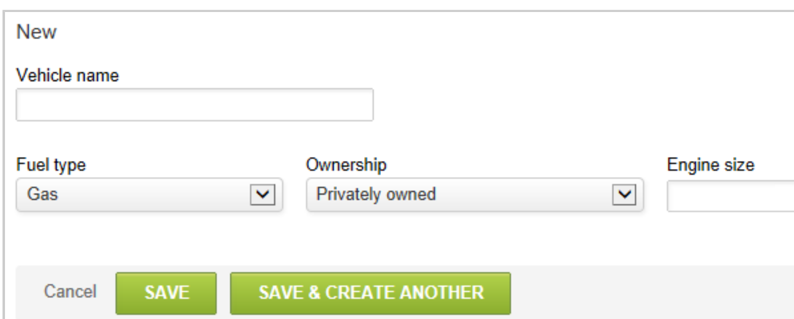
9. The last option is to display an overlapping status on the expense report header. This option is only available if your setup has specified expense report durations such as weekly or monthly and you have not disabled overlapping expense reports.
10. Select Receipt order: By date or By reference number.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

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

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

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

Vehicles



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

To enable the Vehicle feature:

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

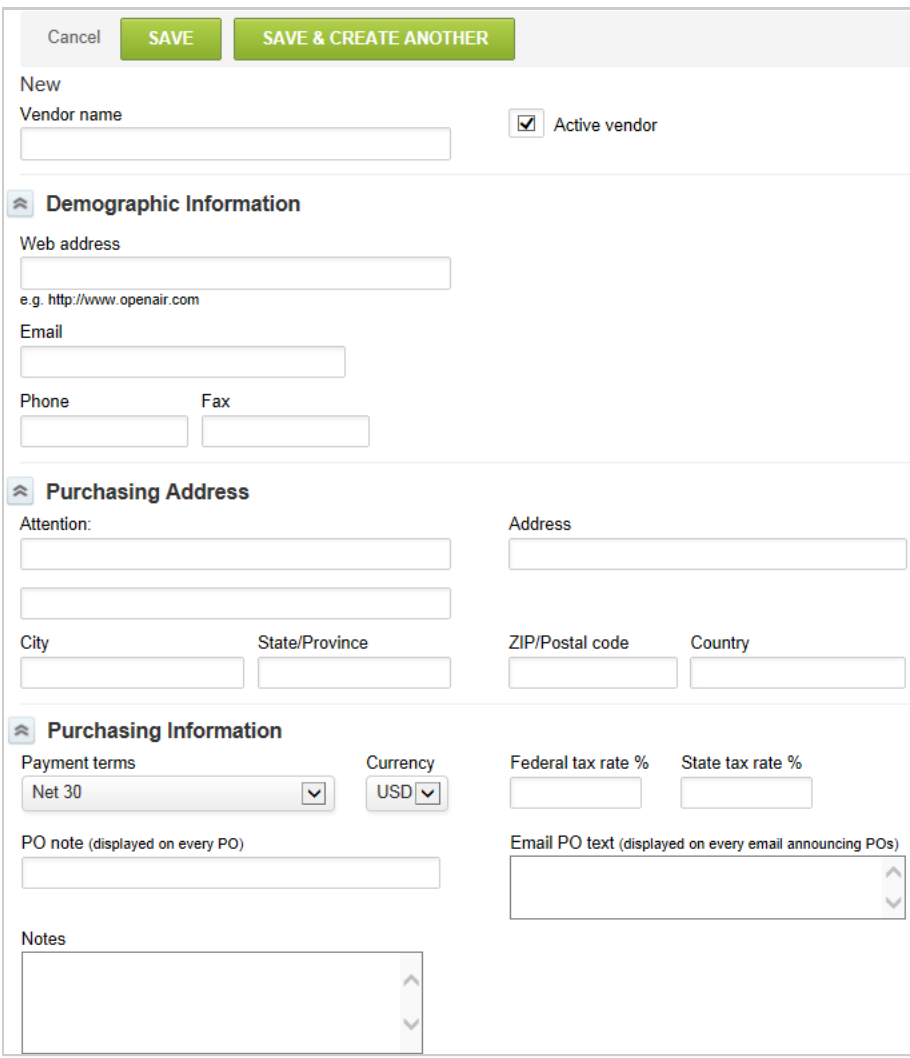
When one or more vehicles have been set up in your OpenAir account, the Vehicle drop-down list is available on mileage receipts in the Expenses application and on mileage expense charges you create in the Invoices application.

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

To enter a Vehicle:

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

Vendors



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

To display the Vendor form:

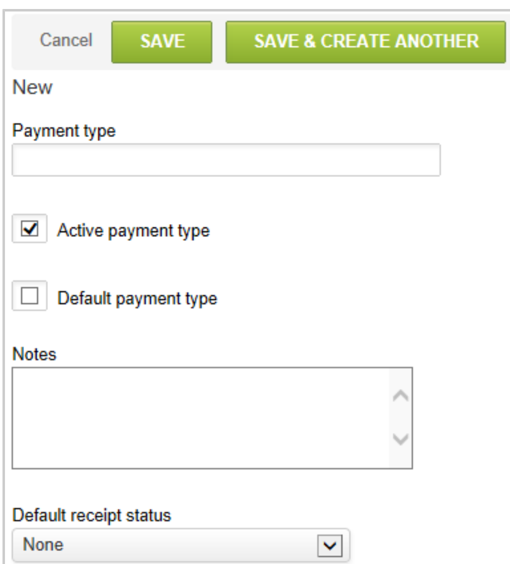
Go to Administration > Application Settings > Expenses > Other settings and select or clear the switch to **Hide the Vendor field on receipts**.

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

To create a Vendor:

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

Payment Types



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

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

To enable Payment types:

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

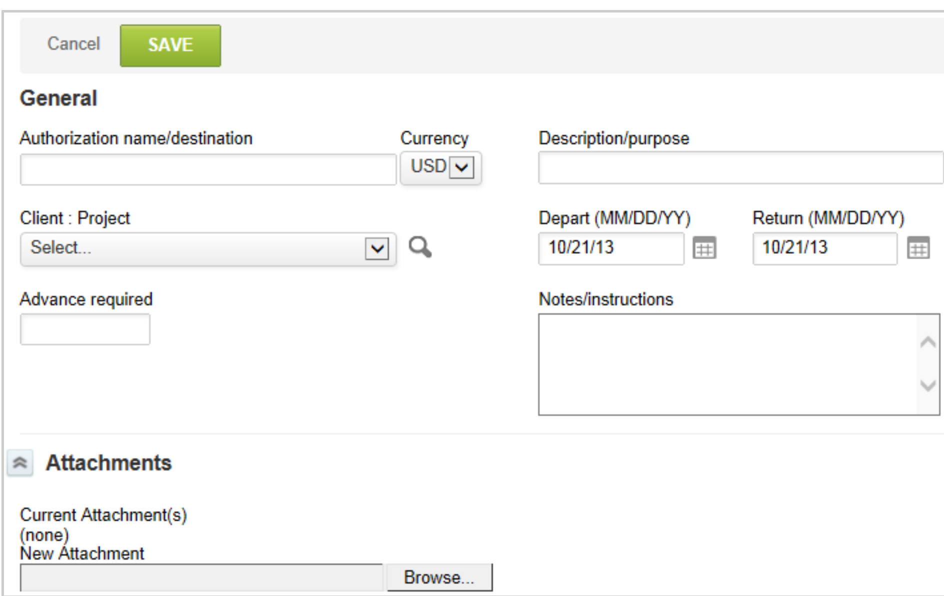
To create a Payment type:

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

To create a Payment type custom field:

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

Authorizations



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

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

To enable Expense authorizations:

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

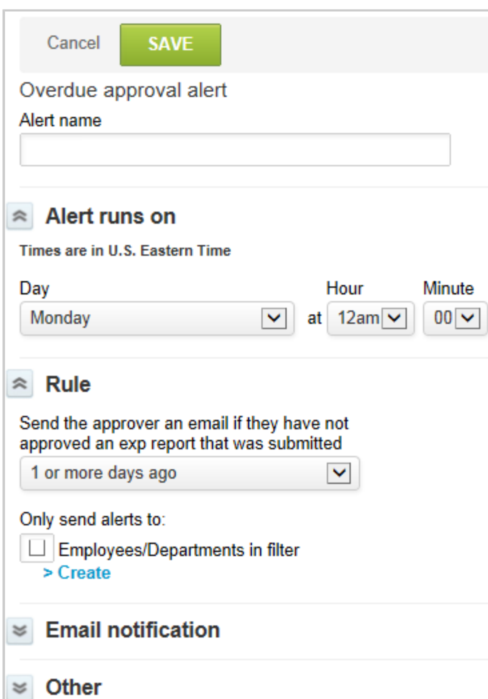
Authorization Numbering

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

To request an Authorization:

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

Alerts



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

To create an Overdue approval alert:

1. Go to Administration > Application Settings > Expenses > Alerts.
2. Select **New Overdue approval alert** from the **Create Button**. The Overdue approval alert form displays.
3. Name the alert.
4. Under Alert runs on, select the day and time when the Alert should run.
5. Under Rule, define the appropriate selection rules for why the employees would receive an email alert.
6. Check the box to specify Employees/Departments in filter and click Create to identify departments and employees to specify who receives an email alert.
7. Use the Email notification section to define the email sender, subject and text, and decide whether to copy other employees on the alert email.

   > **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`. See also Email Settings.

8. Add notes, as desired. These notes do not appear anywhere in the alert; they are for informational purposes, such as remembering why the alert was created.
9. Select Active alert to make this alert active.
10. Click Save.

Other Settings

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

To access the Expenses Other settings:

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

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

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

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

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

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

> **Important:** To use this feature, you must create a payment type exactly named “Company paid”.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

> **Important:** If the Access All Tasks optional feature is enabled for your account, employees have access to, and can enter expenses against all tasks in the project if they are booked to an open task in this project. See the help topic Access All Tasks.

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

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

Enable the missing paper receipt feature: When you enable this feature, a Missing paper receipt check box displays on the receipt form or worksheet. This feature is useful to Accounts Payable if you submit receipts with the expense report and a reconciliation effort is done against the receipts entered on the expense report.

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

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

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

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

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

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

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

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

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

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

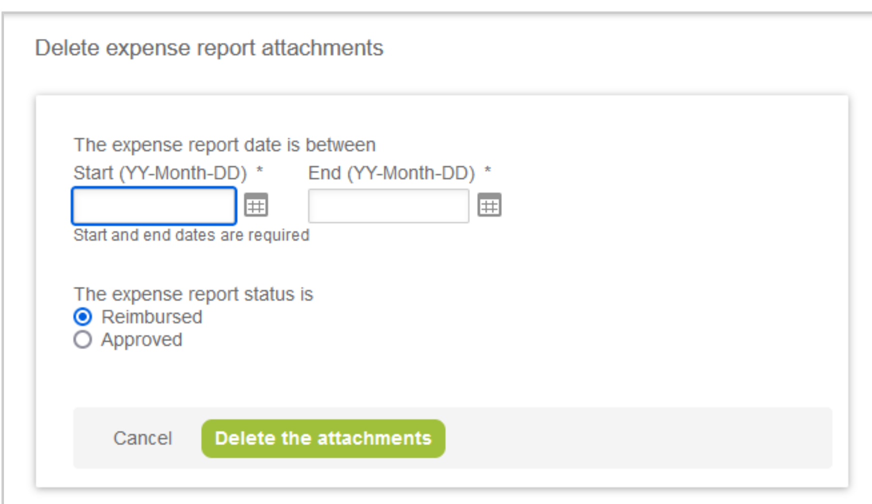
Expense Attachment Deletion Wizard

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

You need to specify:

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

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



Projects

Overview

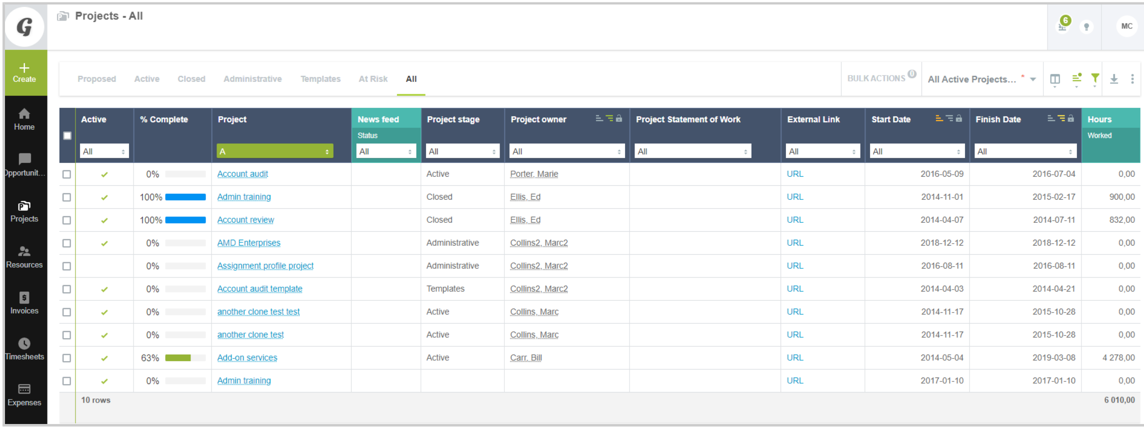
The Projects module holds the project plan, the work breakdown structure, personnel assignments, financial information including billing and recognition rules, and reports. Customers enter and maintain specific project plan information and outline the work breakdown structure in detail. They can categorize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

See the following help topics:

- Projects — Introduction
- Project Status Summary (PSS)
- Project Status News Feed
- Outline, Gantt, and Task Detail Views
- Booking Worksheet Display
- Advanced Booking Worksheet
- Charge Projections
- Billing
- Revenue Recognition
- Issues
- Pricing
- Project Billing Defaults
- Project Budget
- Project Center Options
- Transactional Budget
- Gantt Display (without Outline, Gantt, and Task Views enabled)
- Project Locations
- Project Stages
- Worksheet Display
- Task Types
- Alerts
- Assignment Groups
- Notifications

  See Notifications under Global Features.
- Extended Category Feature: Service line 1 - Service line 5
- Projects Best Practice Guidelines
- Other Settings
- Frequently Asked Questions

Projects — Introduction



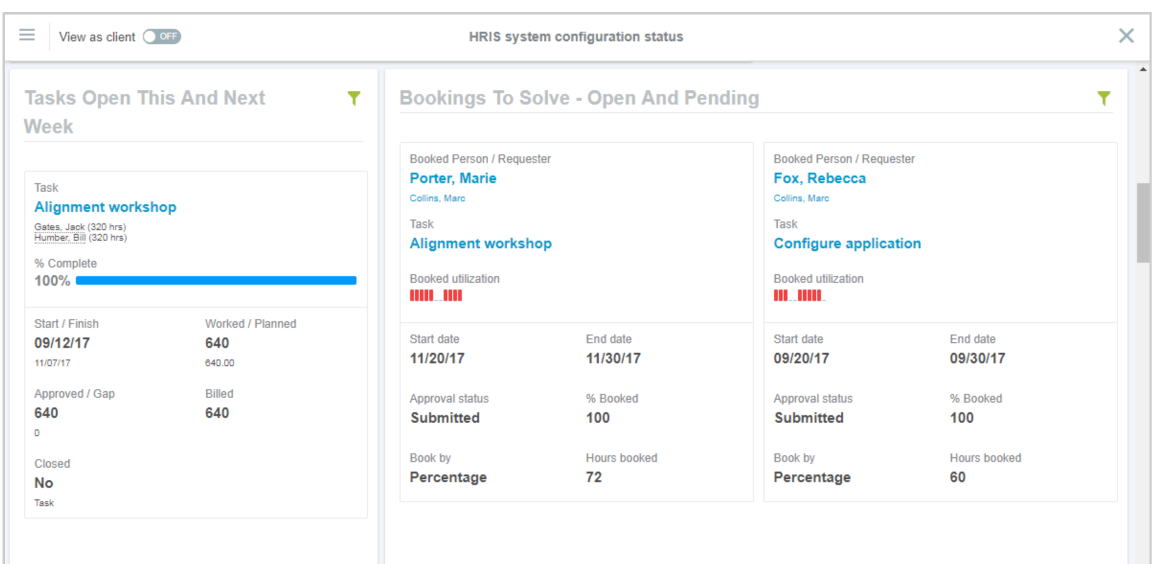
The Projects application is one of the primary components within OpenAir. This is the application where you manage your company's projects. There are a number of configuration settings and data elements associated with the Projects application. The features and flexibility within this application are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

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

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

Project Status Summary (PSS)

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



Enabling Project Status Summaries

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

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

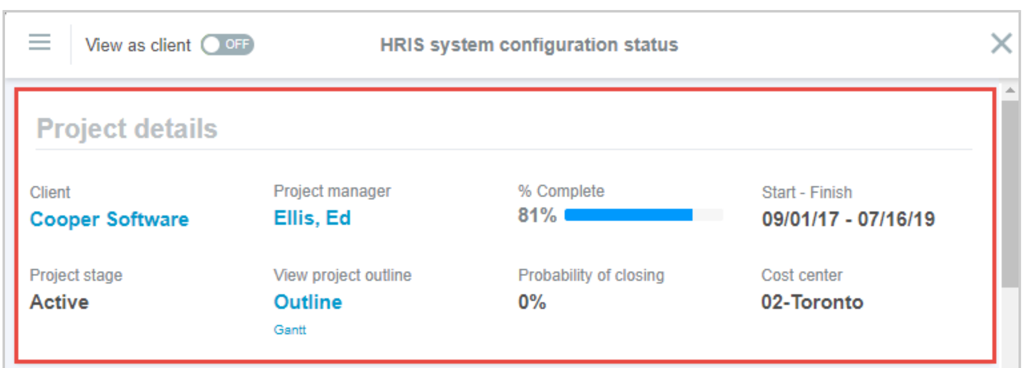
Opening Project Status Summaries

There are three ways to navigate to the PSS:

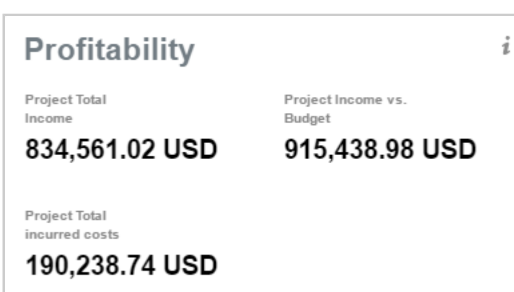
- Point to any element which opens a project QuickView and click **Status summary**.
- In any project QuickView, click the icon in the upper right corner.
- Go to Projects > Projects and select a project. In the Project Dashboard, click the icon next to the project name.

Using Project Status Summaries

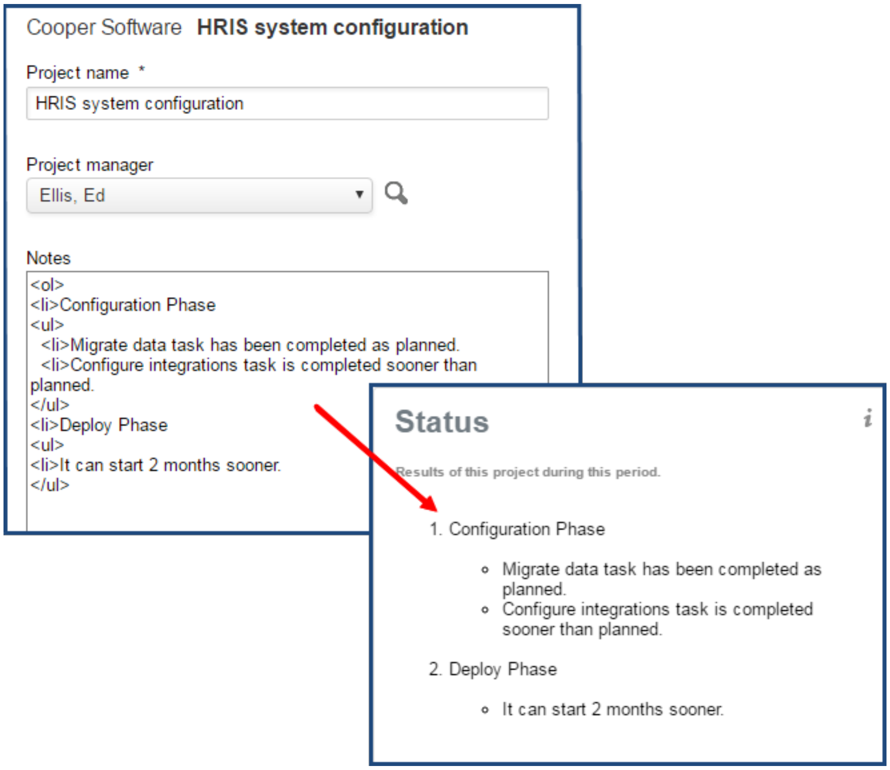
Each Project Status report can contain a header with basic information about the project. The default project header can be modified or deleted.



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



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



Editing Project Status Summary Layouts

To edit the Project Status Summary layout:

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

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

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

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

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

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

- To put an item in a portlet card header in a dynamic portlet card, drag the item from the card body to the card header.

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

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

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

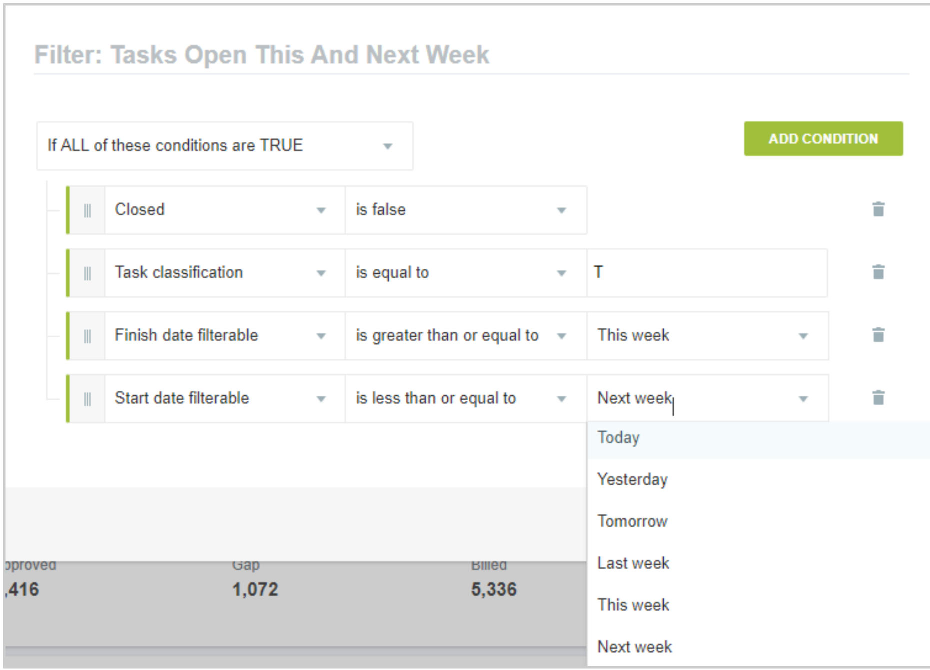
Filters support relative and rolling date filters.

The available operands are:

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

Next year				

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



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

Printing Project Status Summaries

To print a Project Status Summary:

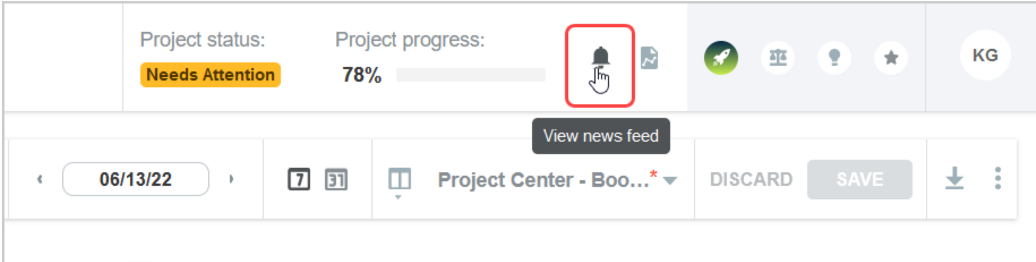
1. Click the **Options** icon and click **Print**.
2. Set your printer settings and click **Print**.

Project Status News Feed

Add, update, and display project status messages to keep project stakeholders informed.

When this feature is enabled:

- Project record headers and project QuickViews show a news feed icon . Click this icon to open the project status news feed, where you can add status updates to your project or read existing updates.

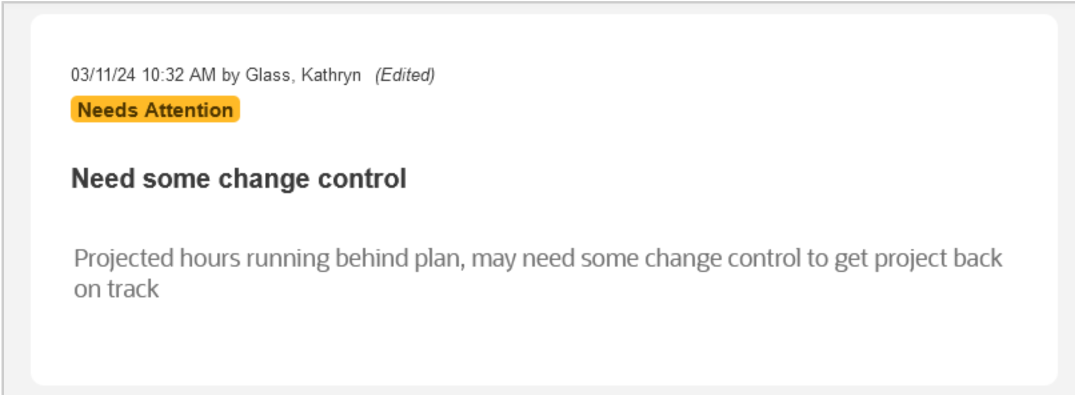


- You can add the **News feed — Status** column to your list views.
  - The **News feed — Status** column shows the project status as a color coded text badge, if there are any status updates for the project and if a project status is set in the latest status update.
  - Click the status to open the project status news feed from the projects list view and view the latest status update details. You can sort and filter your data by status using the list view sort and filtering options.

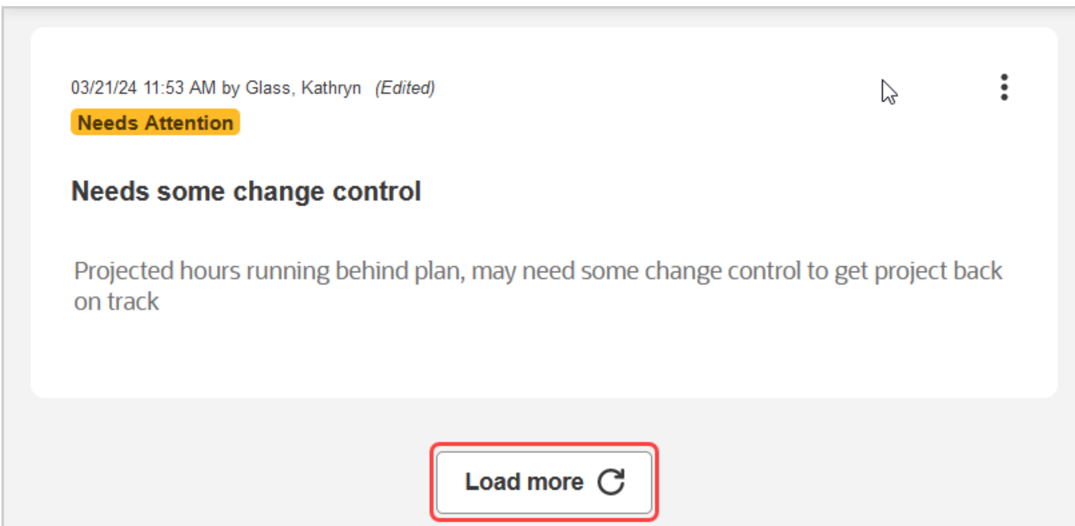
Project	News feed Status	Project stage
All	All	All
Project Center implementation	NOT STARTED	Active
Data Migration	NEEDS ATTENTION	Active
ERP Deployment	COMPLETED	Active
Pegasus	ON HOLD	Active
Hardware implementation	ON TRACK	Active
OAuth2 Support for all Integrations		Active
Hardware Implementation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

> **Note:** The **News feed — Status** column is currently only available on redesigned list views if the Project Status News Feed feature is enabled for your account.
>
> The project status is not currently supported in:
>
> - Project status summary
> - Reports
> - Dashboard portlets
> - List views other than redesigned list views.

Each status update shows a date and time stamp and the name of the person who created it.

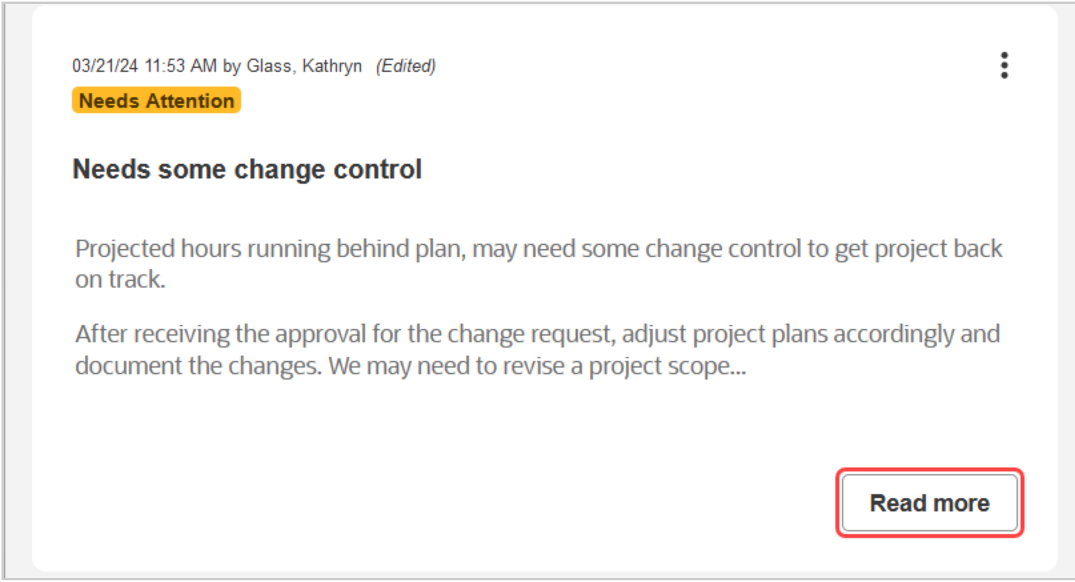


By default, the news feed displays 5 status updates when opened. Click **Load more** to load additional messages.

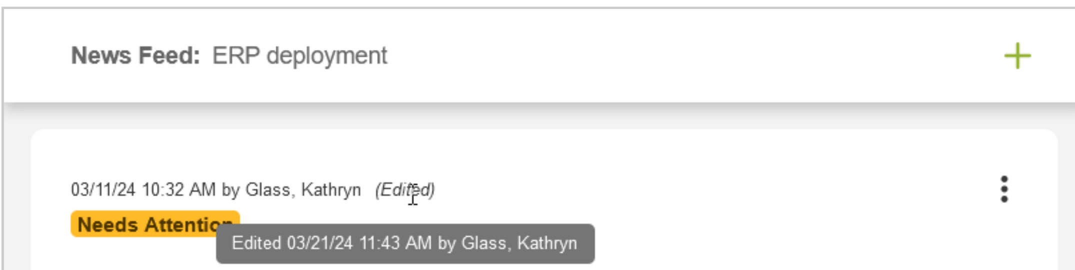


You can scroll through the news feed when there are more status updates than the page can fit.

Long status updates are not shown in full. Click **Read more** to see all the text.



Status updates can be edited. Edited status updates show the mention *(Edited)* in the upper right corner. Point to *(Edited)* to see when and by whom the status update was edited.



To close the project status news feed, click anywhere outside of it.

Account administrators can control who can view or modify the project status news feed using the following role permissions:

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

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

> **Note:** To enable the Project Status News Feed feature, contact OpenAir Customer Support.

Adding a Project Status Update

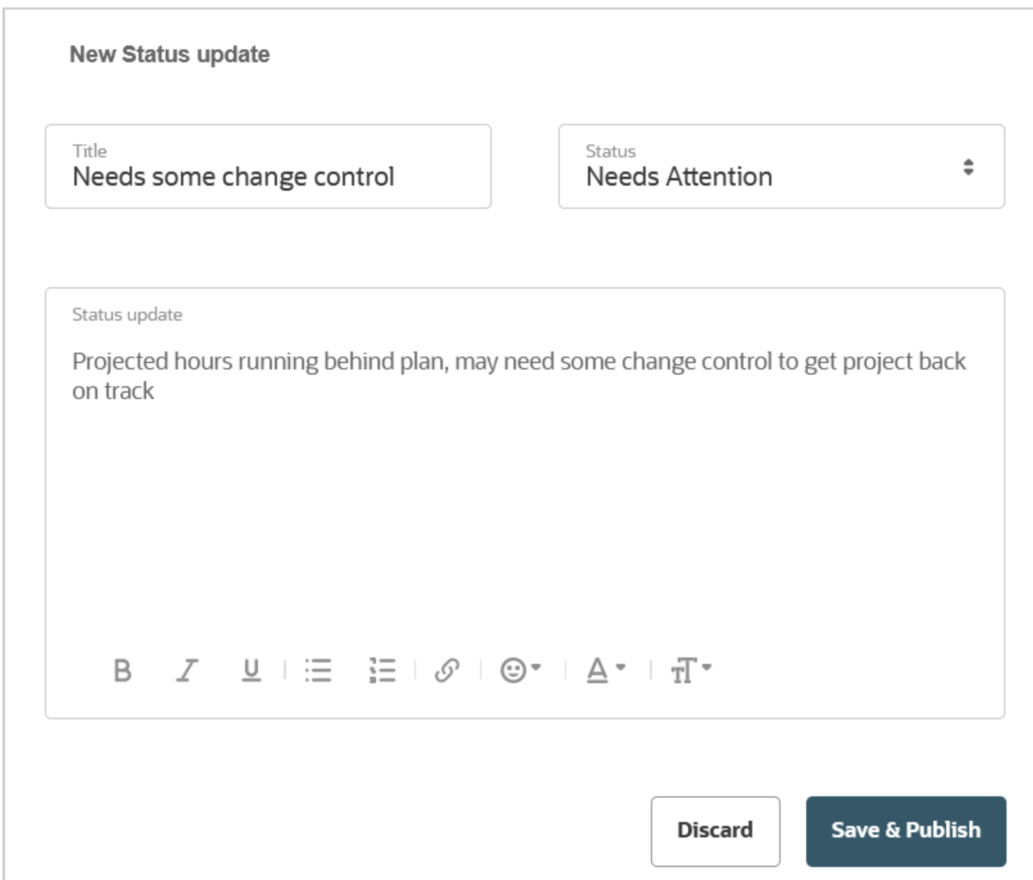
If the Project Status News Feed feature is enabled for your account and you have the relevant role permissions, you can add status updates for your projects.

To add a project status update:

1. Go to Projects > Projects > [*Select a project*].
2. Click the news feed icon .

   The project status news feed panel appears.
3. Click the + icon in the top right corner of the project status news feed panel. The New Status Update window appears.
4. (Optional) Enter a **Title** for the status update. The title is limited to 125 characters.
5. Select a **Status** from predefined options.
6. Enter the **Status message**. The main text box uses a rich text editor with the following functionality:
   - Creating bold, italicized, or underlined text
   - Creating bullet lists or numbered lists
   - Adding hyperlinks
   - Adding emoticons
   - Distinguishing between headers and main body text
   - Changing font color

   The status update text is limited to 3,000 characters.

7. Click **Save & Publish** to publish your status update, or **Discard** to cancel and return to the project status news feed panel.

Editing a Project Status Update

If you have the relevant role permission, you can edit project status updates at any time.

To edit a project status update:

1. Point to the upper right corner of the status update you want to edit and click the options icon ⋮ which appears.
2. Click Edit.

   The Edit status update window appears.
3. Make the necessary changes, and click **Save & Publish**.

Deleting a Project Status Update

If you have the relevant role permission, you can delete project status updates at any time.

To delete a project status update:

1. Point to the upper right corner of the status update you want to delete and click the options icon ⋮ which appears.
2. Click **Delete**.

   A confirmation dialog appears.
3. Click **OK**.

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

You can customize the project status news feed using the OpenAir SOAP API and XML API. The APIs support reading, adding, modifying, upserting, and deleting news feed entries. For more information, see `Newsfeed`, `NewsfeedMessage` and `Project`.

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

Outline, Gantt, and Task Detail Views

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

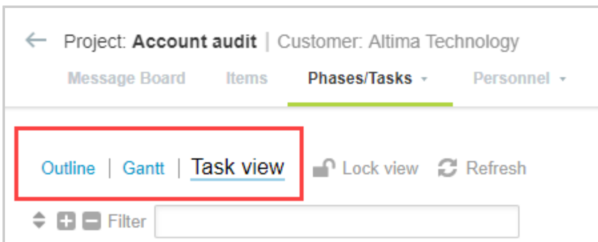
The Outline, Gantt, and Task Detail views can be found at Projects > Projects and clicking on a project name. If you have **QuickViews for Projects** enabled, you can point to a project name and select **Outline** or **Gantt** under Quick navigation > Project. If you have a large monitor, it is possible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

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

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

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

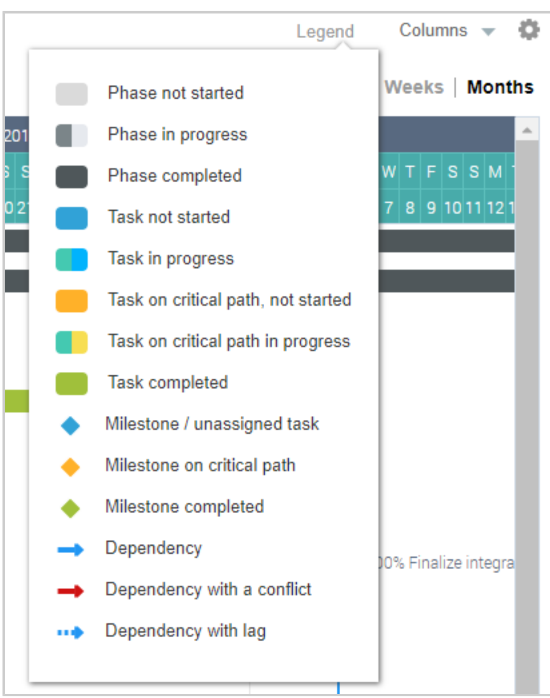
Navigating Between and Using Outline, Gantt, and Task Detail Views



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

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

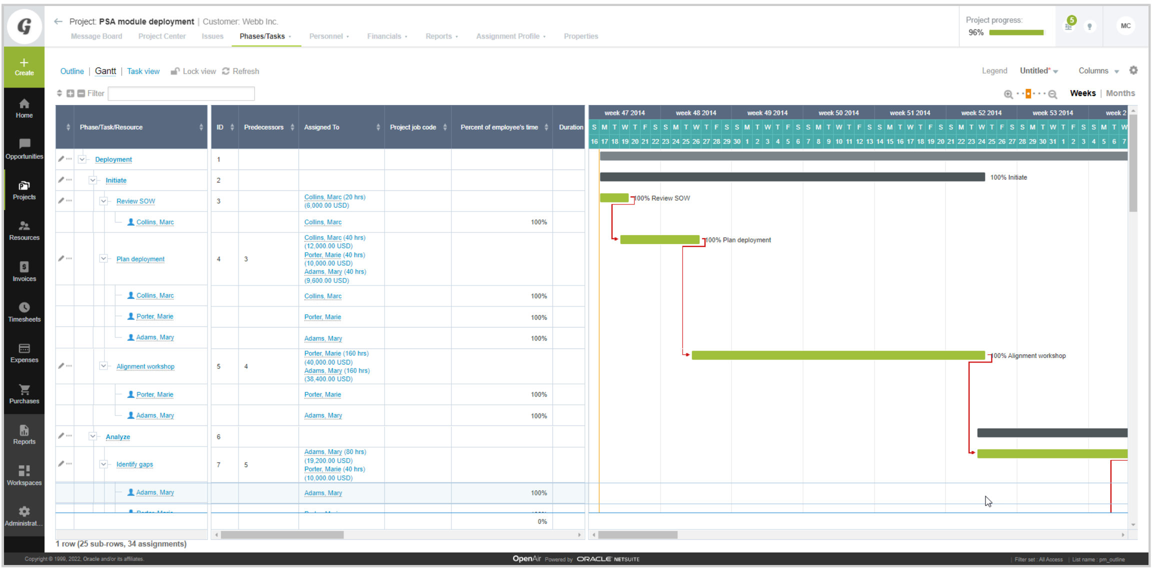
Point to **Legend** in the upper right to open a window describing the various colors and symbols used in Gantt View.



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

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

Customizing Outline and Gantt Views



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

Resource Icons in Outline and Gantt View

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

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

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

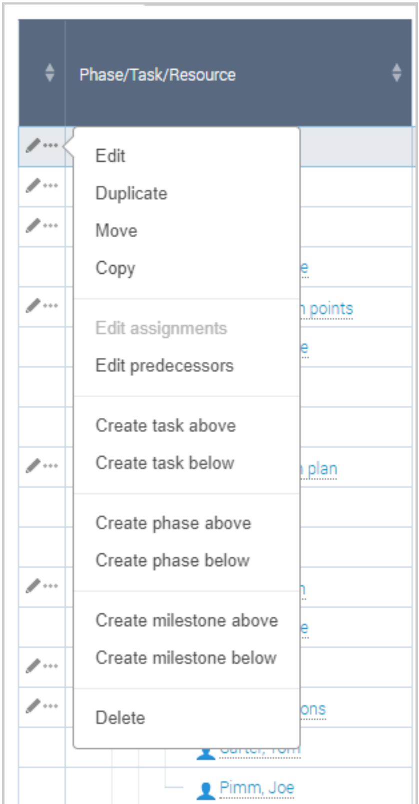
Creating a Phase, Task, or Milestone in Outline or Gantt View

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

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

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

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

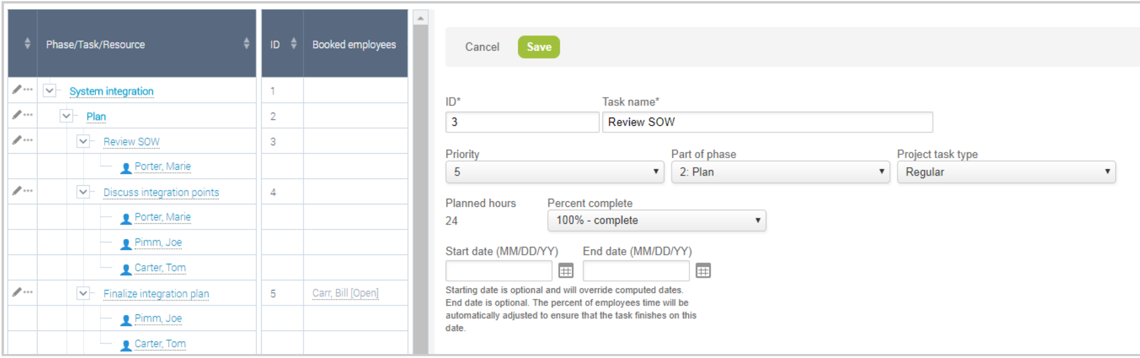


- Otherwise, click the **Create** button, then click **Phase**, **Task**, or **Milestone** under Task/Phase.

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

Editing a Phase or Task in Outline or Gantt View

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



To edit a phase or task:

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

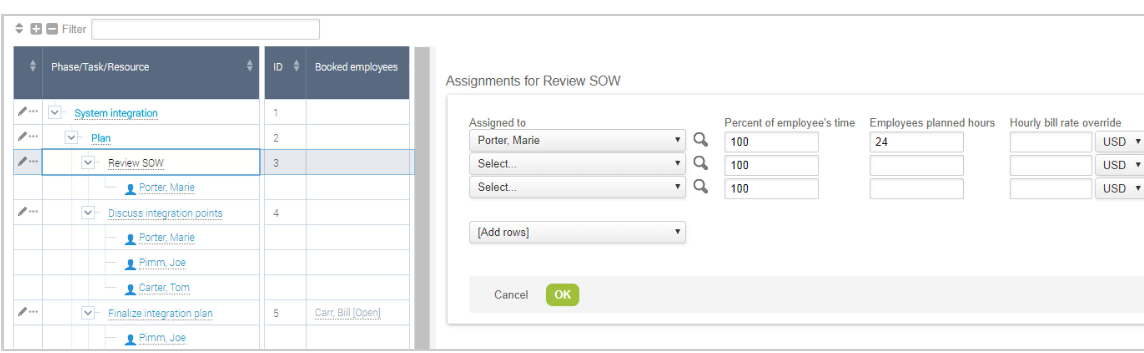
Clicking **Edit** in the context menu opens a standard form allowing attributes to be changed. Calculated dates in Outline view can be overridden; hard dates which you enter inline in the Outline or in the task form are highlighted with green diamonds.

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

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

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

Changing Assignments in Outline, Gantt, and Task Detail Views



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

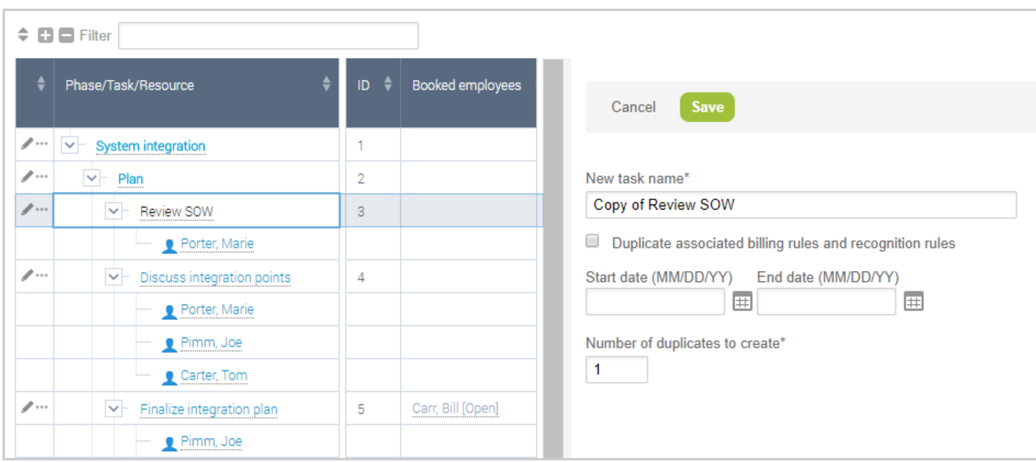
Duplicating and Copying a Task in Outline, Gantt, and Task Detail Views

To duplicate, copy or move a task:

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

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

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

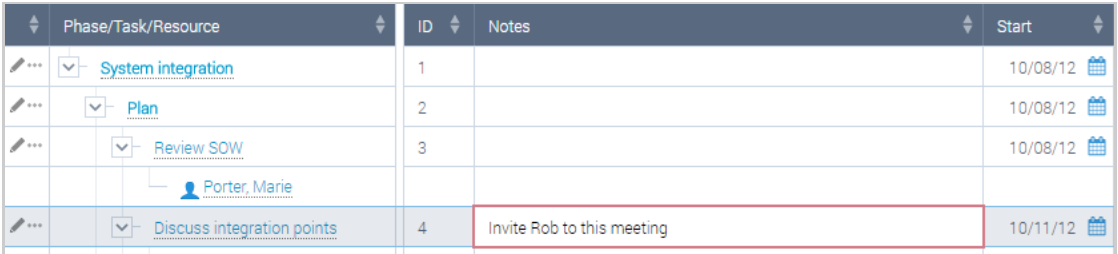
   

3. Click the ellipsis icon next to the task and select **Move** to move a task to another project without copying it.

> **Note:** Copying and moving tasks can also include subtasks.

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

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



The following items can be edited in this way:

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

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

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

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

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

Making Changes in Gantt View

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

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

Marking Tasks as "Non-billable" and Excluding From Project Budgets

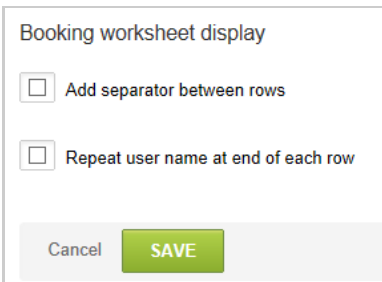
Non-billable tasks can be excluded from billing plans and budgets.

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

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

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

Booking Worksheet Display



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

To access and modify the Booking worksheet display:

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

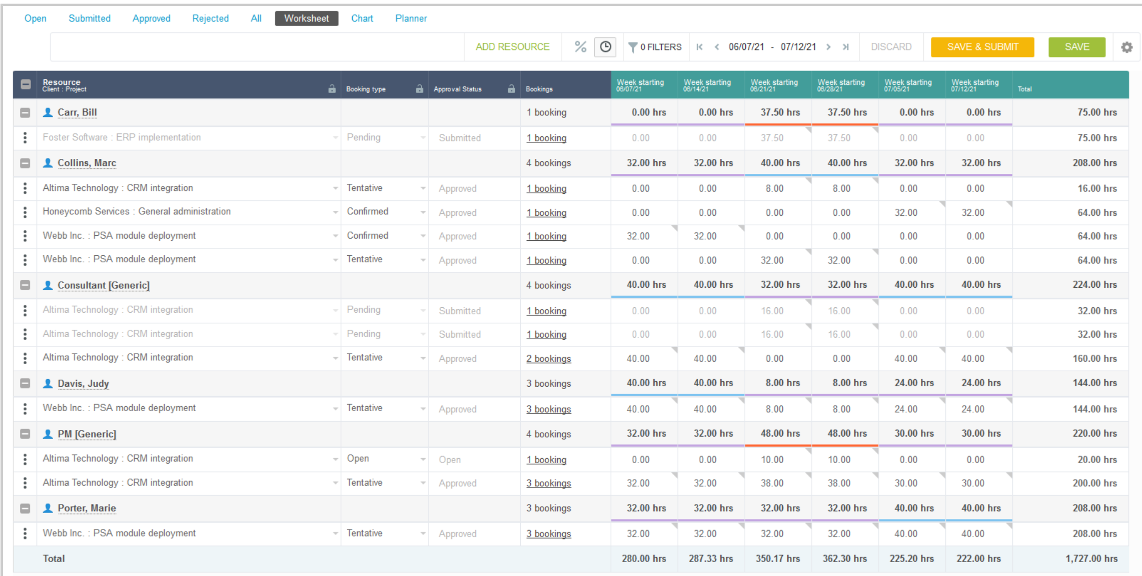
Advanced Booking Worksheet

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

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

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

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



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

To enable the Advanced Booking Worksheet:

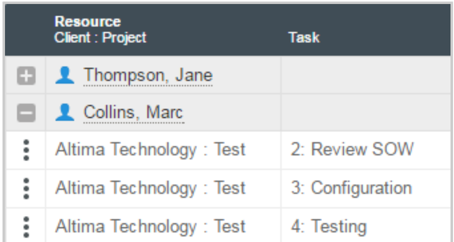
1. Contact OpenAir Customer Support and request the “Advanced Booking Worksheet” feature.
2. Confirm that you have enabled the Resource Planner feature. If not, contact OpenAir Customer Support and request the “Resource Planner” feature.
3. Assign role permissions for non-administrators who will use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

To open the Advanced Booking Worksheet:

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

Using the Advanced Booking Worksheet

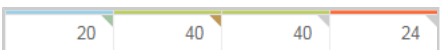
The Booking Worksheet appears as a table with each resource listed in the leftmost column. Point to a resource name to open a QuickView window with various booking-related actions you can perform. You can expand each resource's worksheet rows by clicking the ⊞ icon next to their name, or collapse the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



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

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

Note: Utilization over 100% is always colored red.

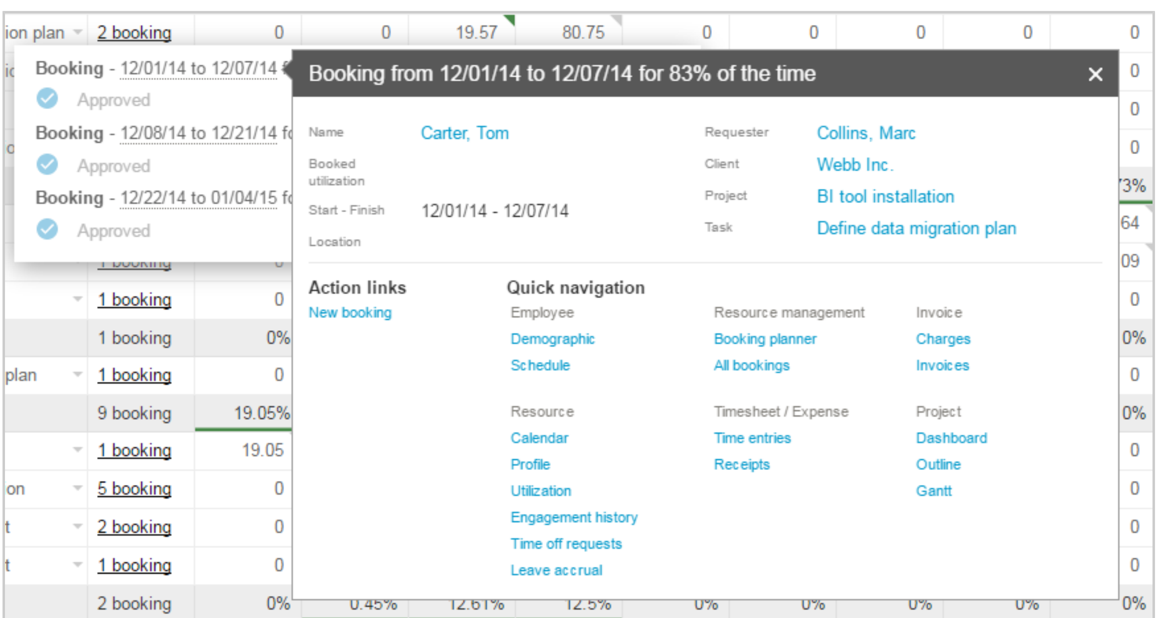


In addition, period cells may contain a triangular icon with more information.

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

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

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

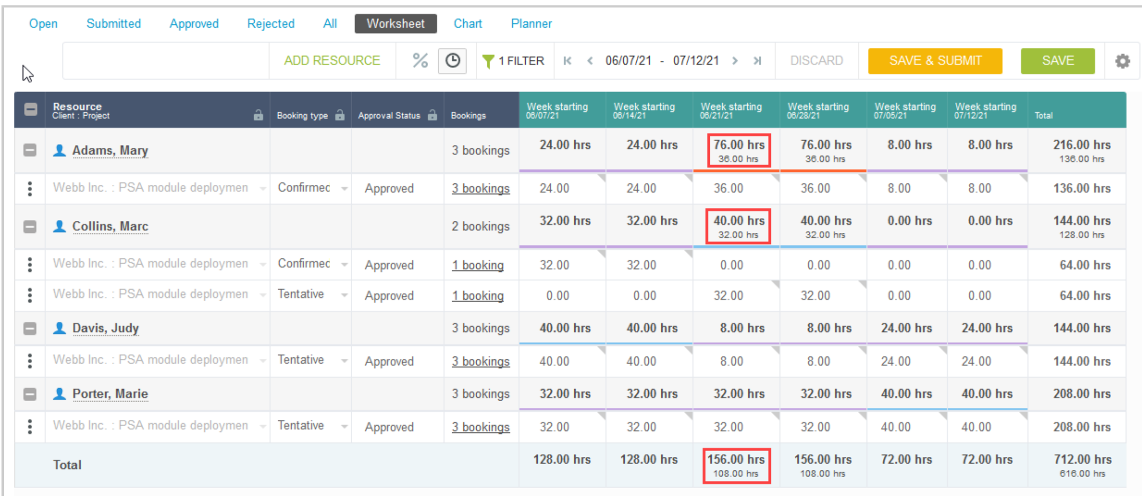


Select a date range to display using the date selector at the top of the worksheet. You can also choose to display and enter bookings per time period as a percentage of utilization or number of hours.

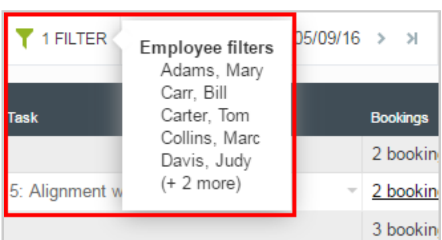
Resource utilization subtotals are visible for both the filtered set and all resource bookings when filters are applied in the advanced booking worksheet.

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

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



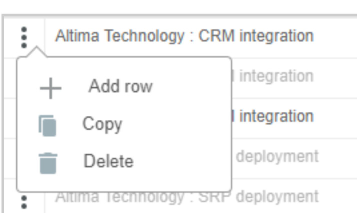
A filter indicator at the top of the worksheet shows how many filters you currently have applied. Click the indicator to open a tooltip with a description of the filters.



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

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

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



To add worksheet rows in the Advanced Booking Worksheet:

1. Click the ⋮ icon and click “Add row”.

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

To copy worksheet rows in the Advanced Booking Worksheet:

1. Click the ⋮ icon next to the row to copy, and click “Copy”.

To delete worksheet rows in the Advanced Booking Worksheet:

1. Click the ⋮ icon next to the row to copy, and click “Delete”.

To edit worksheet rows in the Advanced Booking Worksheet:

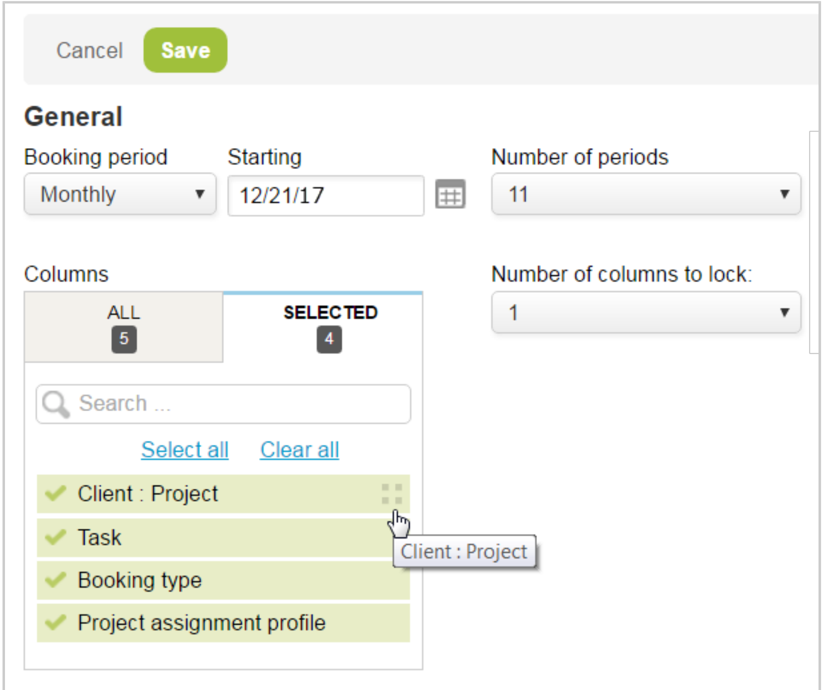
1. Click the cells which you would like to change and enter or select your changes. For example, click a booking type cell to change the booking type from "Open" to "Pending" for that booking.
2. To change a worksheet row's Customer and Project, click a customer and project in the Customer : Project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

To customize columns in the Advanced Booking Worksheet:

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

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

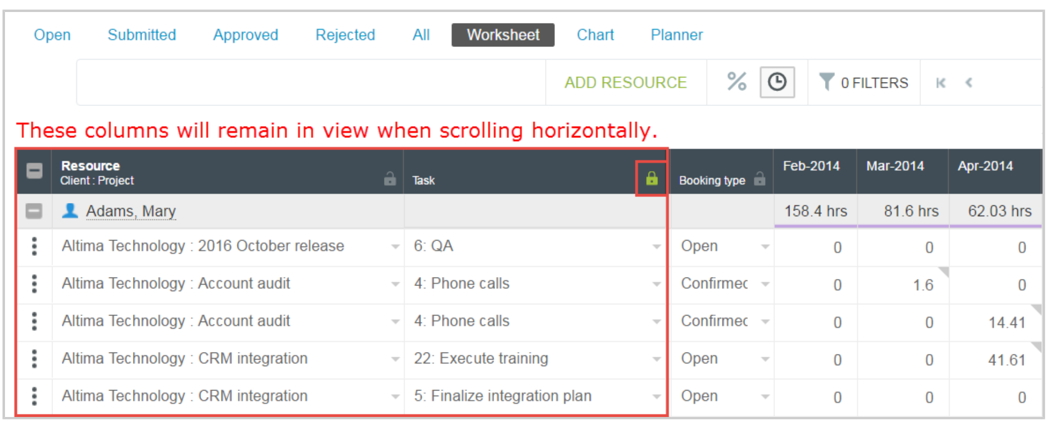
4. Reorder columns by clicking and dragging the “Drag to reorder item” ⁞⁞ icon at the right side of the column name
5. Click **Save**.



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

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

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



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

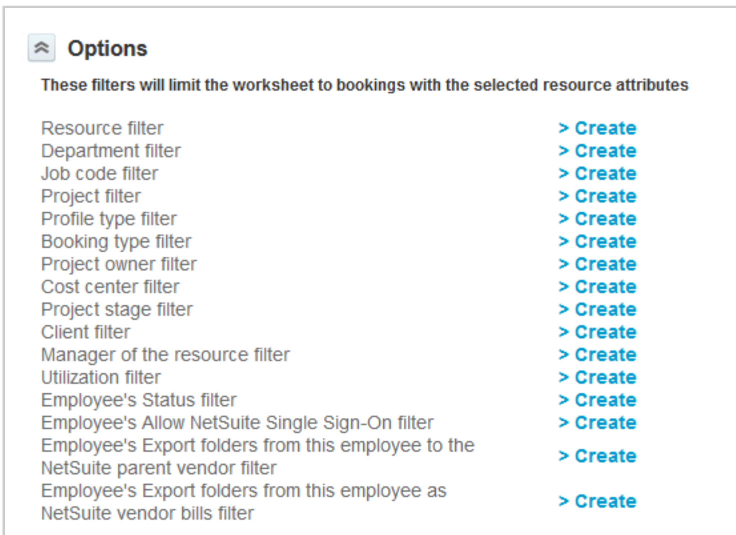
To save changes and submit visible Open bookings to the next approval workflow status in the Advanced Booking Worksheet:

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

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

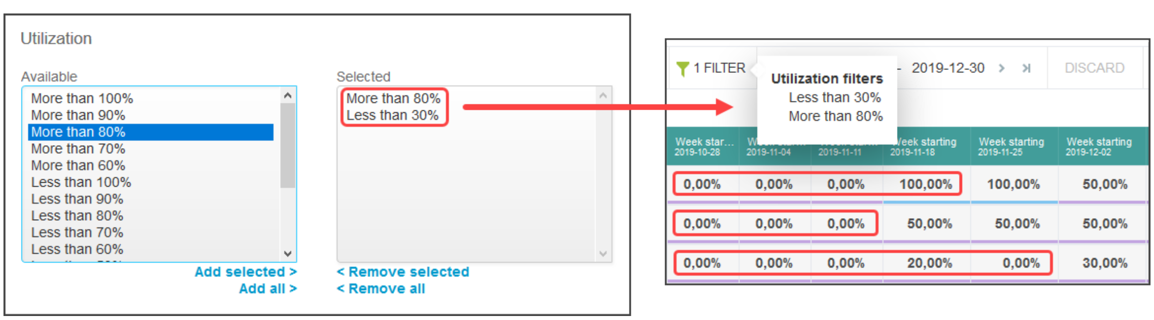
To set filters in Advanced Booking Worksheet:

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



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

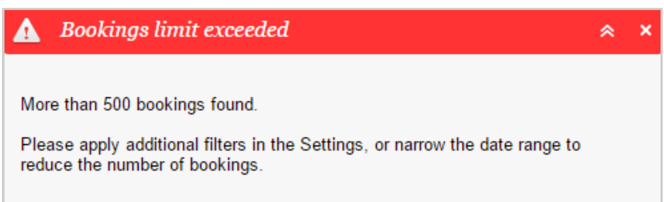
The utilization filter lets you filter for resources with more or less than a certain utilization percentage in any of the visible booking periods. For example, select **More than 80%** and **Less than 30%** to list only those resources with more than 80% utilization or less than 30% utilization in any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



Advanced Booking Worksheet Optional Functionality and Settings

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

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



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

Charge Projections

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

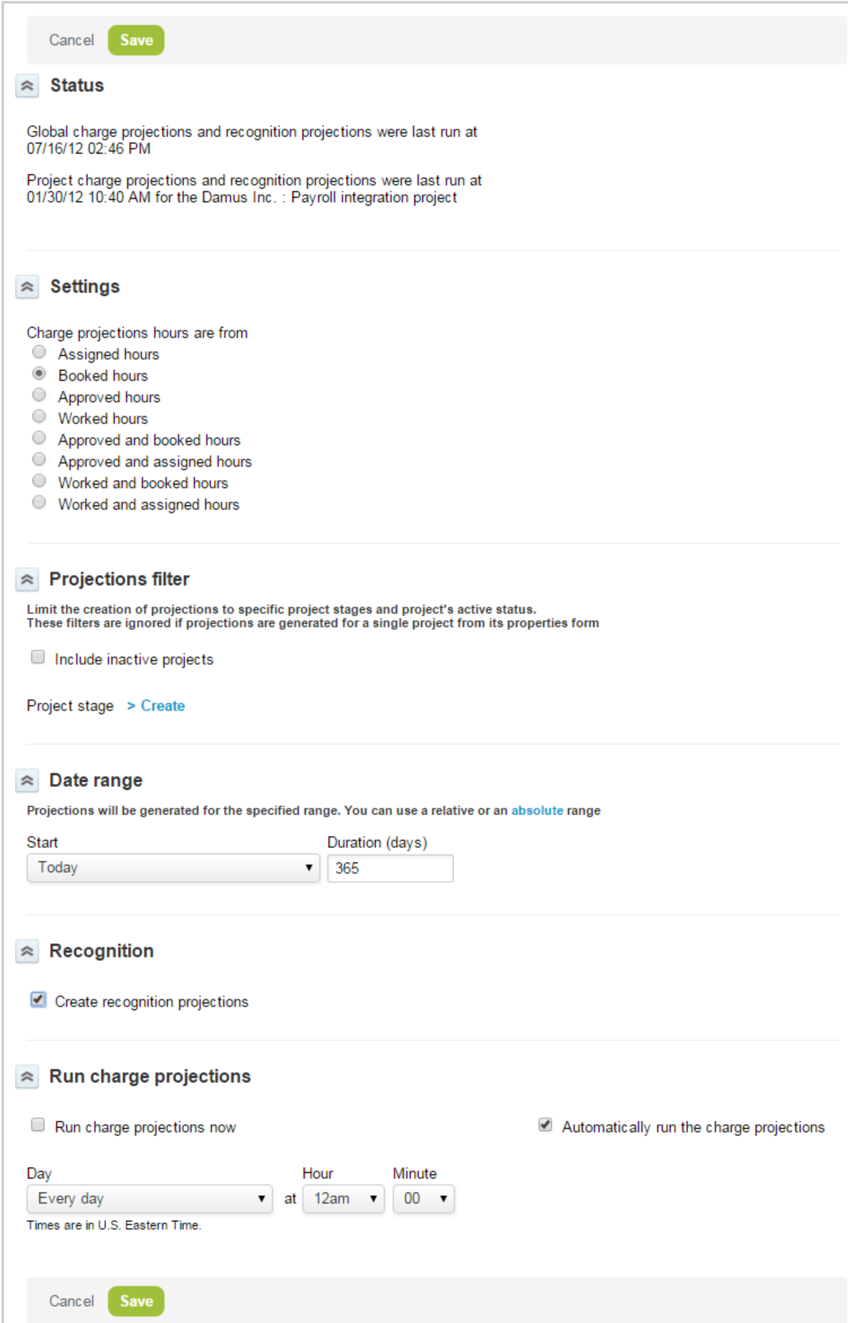
The Settings you select are determined by the process by which you allocate resources to a project. Accurate resource allocation provides reliable financial forecasting. If you are not using the Resources application, then the booked hours options do not display in the charge projection selections.

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

Note: The following features affect charge projections settings. To enable these features, contact OpenAir Customer Support.

- **Allow charge projections to be run for individual projects** — adds a **Run charge projections** link to the Tips section on each project Properties form. Charge projections will be run using the criteria set in Administration > Projects Settings > Charge Projections.
- **Do not used booked or assigned hours before today when running charge projections using approved/worked and booked/assigned** — ignores booked/assigned hours in the past regardless of whether time has been entered on a timesheet for approved/worked charge projections.
- **Exclude Project from Charge Projections** – When enabled, you can control whether to exclude a project from charge and revenue projections from the project properties form. See the help topic Exclude Project from Charge Projections

To access and modify Charge Projections, go to Administration > Application Settings > Projects > Charge projections.



Status

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

Settings

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

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

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

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

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

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

Projections filter

You can limit global charge projections to project in selected project stages and limit the process to currently active projects. By default, inactive projects are excluded from projections, so no values are generated for them when these are run.

To run projections for inactive projects, check the **Include inactive projects** box in the **Projections filter** form.

To run projections only for projects in selected project stages, click **> Create** or **> Edit**, and select the project stages.

> **Note:** Setting filters for global charge projections can reduce the number of generated entries and improve performance. The projections filter only applies when global projections run. It is ignored when projections are generated for a single project in the project properties form.

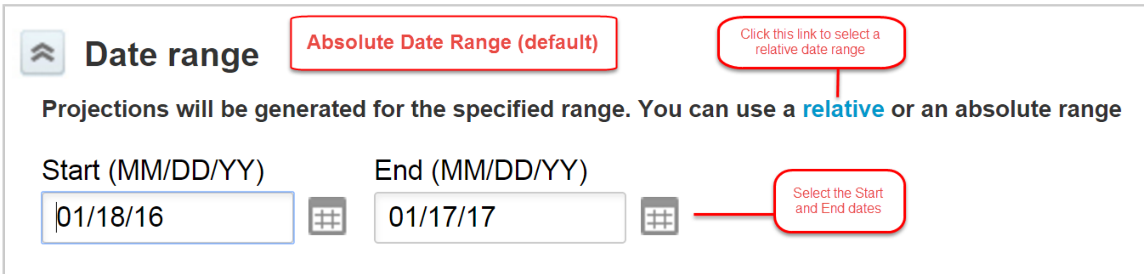
Date range

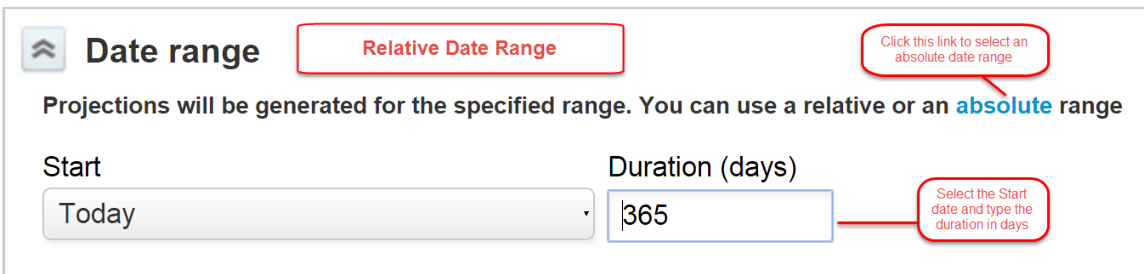
Project charge projections are flexible. You can define an absolute date range by entering specific start and end dates or define a relative date range by selecting a start date and a entering a duration in days. Projections are then generated for the range you specified.

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

Note: Setting a date range for global charge projections can reduce the number of generated entries and improve performance. Longer date ranges increase the amount of data which must be processed, which increase the length of time it takes to run projections.

The date range only applies when global projections run. It is ignored when projections are generated for a single project in the project properties form.





Run charge projections

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

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

To run global charge projections manually:

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

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

To run charge projections manually for a specific project:

1. Open the project you want a charge projection for.
2. Go to the project's **Properties** section and click the **Tips** button on the left side of the screen.

3. Select **Generate charge projections for this project**.

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

To set projections to run automatically:

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

It is important to run the charge projections and refresh the form to make sure that the projections completed before using the corresponding forecasting reports. To check when charge projections were last run, go to Administration > Application Settings > Projects > Charge Projections > Status (see Status). If a charge projection is currently running, "Global charge projections and recognition projections are **currently running**" will appear in the **Status** section of the Charge projections form.

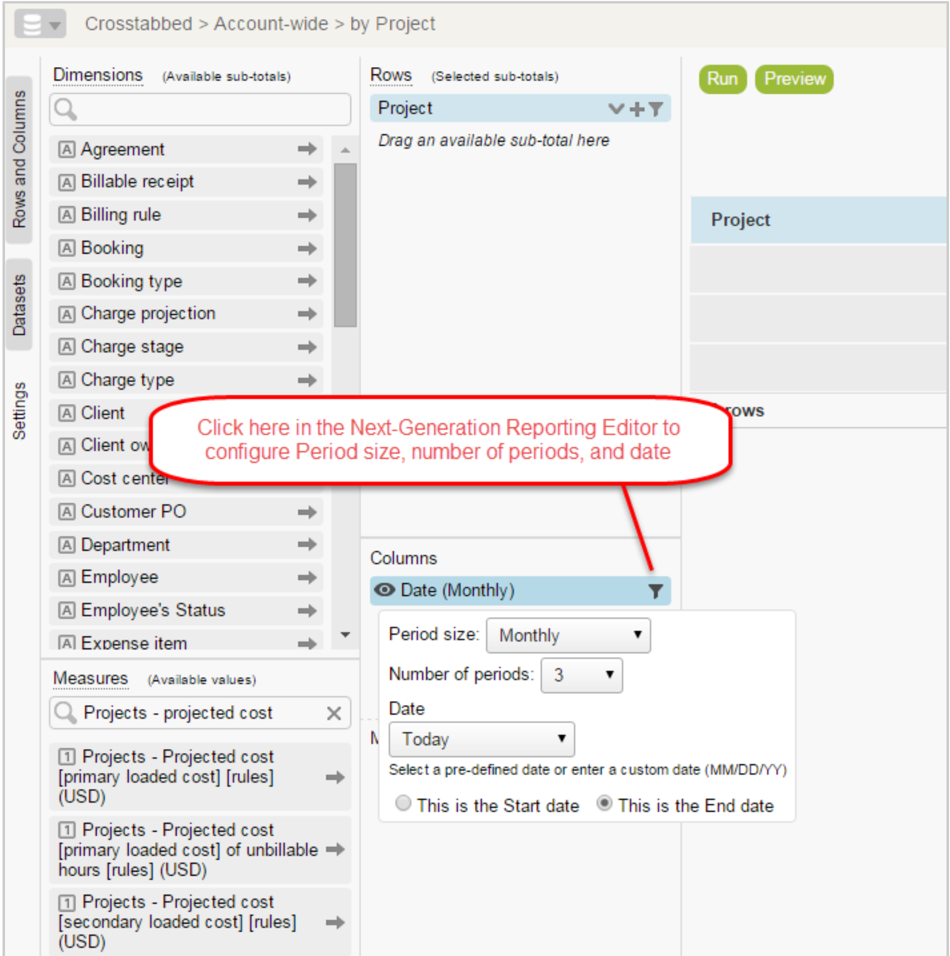
Charge Projections Reporting

Charge Projections Summary Reports

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

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

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



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

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

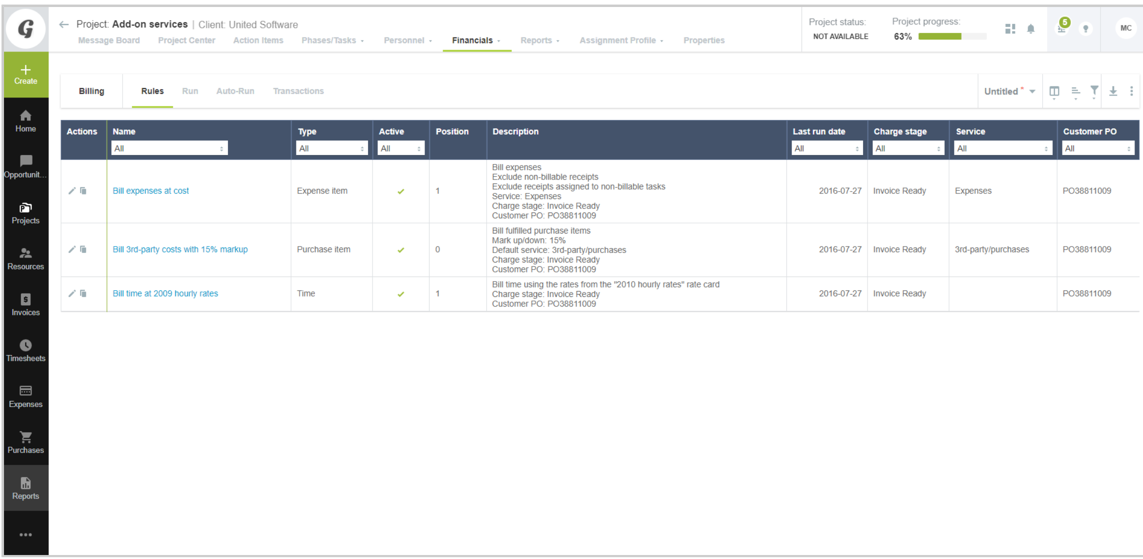
Charge Projections Detail Reports

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

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

Billing

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



Types of Billing Rules

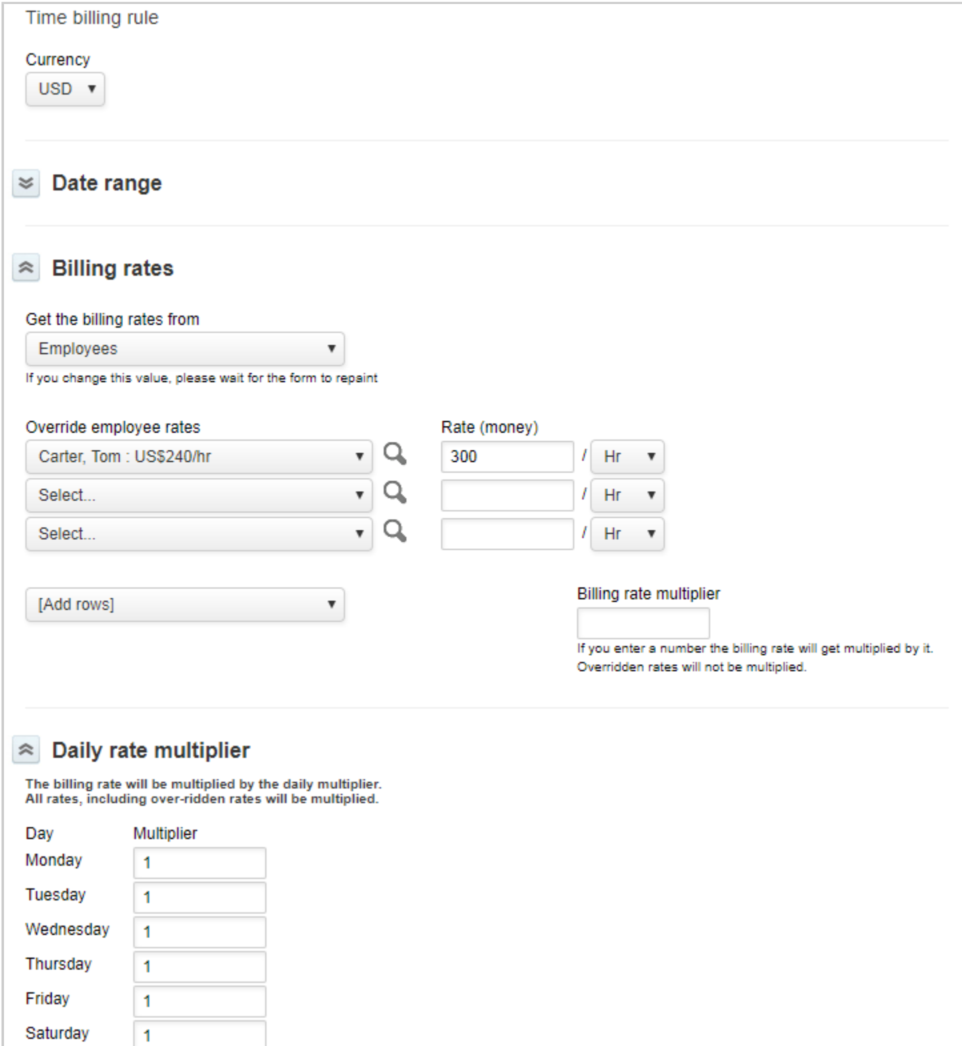
OpenAir has five types of billing rules:

- **Time billing rule** — These rules are applied to your employees' time entries which are associated with a project. Only approved time entries are used by this rule.
- **Expense item billing rule** — These rules are applied to approved receipts associated with a project.
- **Fixed fee on date or milestone** — Use these rules to create a fixed fee or repeating fixed fee for a project. This rule is useful for charging monthly flat rates to customers for work on a specific project.
- **Fixed fee on % complete** — Use these rules to bill a certain amount when a project, project phase, or project task reaches a set percentage of completion.
- **Purchase item billing rule** — Use these rules to bill purchases made through the OpenAir purchases module.

Billing Rule Forms

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

Time Billing Rule Fields



- **Currency** — If your account uses multi-currency, use this list to select the currency you want the billing rule to be run with.
- **Date range** — If needed, enter a start and end date for the time when the billing rule will be in effect. If milestones have been created for the project, you can also select one of these milestones rather than a date.
- **Billing rates** — You can get billing rates from one of four places:
  - **Employees** — If you select Employees from the menu, you can override your employees' assigned billing rates for their timesheet time entries associated with a project. Select the employee from the lists, and enter the new billing rates. If you need more rows, select the number of rows from the "[Add rows]" list.
  - **Rate cards** — If you select Rate cards, you can choose to apply any rate card by selecting it from the "Rate card" list.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

    When running billing with this option selected, the Description column will say "Adjusted for cap" for transactions which have not been fully billed.
  - **Do not bill time entries that exceed the cap** — This rule affects billing when sequential billing rules exist. If selected, when the cap is reached, no further billing takes place. If this option is not

selected, transactions exceeding the cap will pass to successive billing rules, if they exist, for further processing.

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

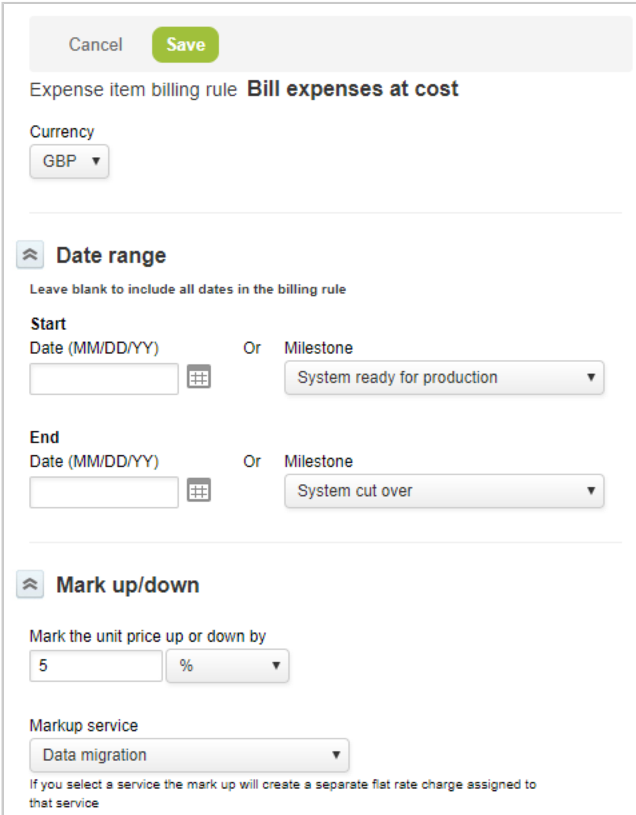
- **Time period cap** — The time period cap limits the number of hours billed for the time period. Type the number of hours and select the time period from the list. Select "Apply the cap on a per employee basis" to apply the cap separately to each employee (for example, each employee has their own 40–hour cap), rather than one cap for all employees (for example, all employees combined time must be under 180 hours).
- **Other Settings**
  - **Name** — You can give the billing rule a name. If this field is cleared, a default name will be assigned. The default name has the following format: "[type] billing rule [#]. For example, a new expense item billing rule's default name would be "Expense item billing rule 1".
  - **Billing rule position** — With this option, set the order in which each rule will be applied when you run project billing.

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

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

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

Expense Item Billing Rule Fields



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

  Note: Enter a negative number for a markdown.

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

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

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

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

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

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

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

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

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

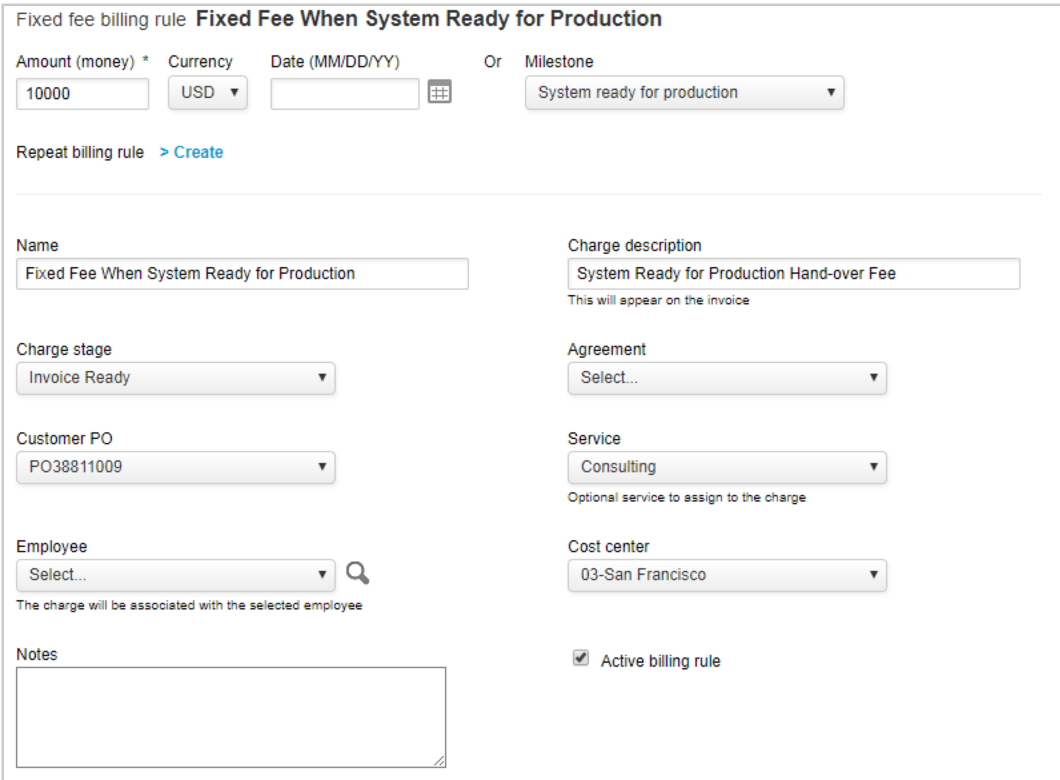
- **Other Settings**
  - **Name** — You can give the billing rule a name. If this field is cleared, a default name will be assigned. The default name has the following format: “[type] billing rule [#]. For example, a new expense item billing rule’s default name would be “Expense item billing rule 1”.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

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

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

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

Fixed Fee on Date or Milestone Billing Rule Fields

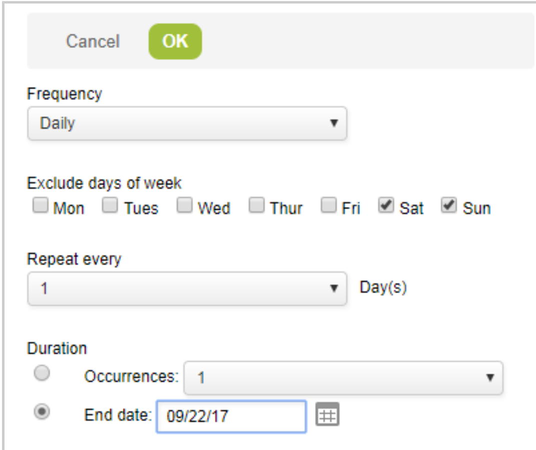


- **Amount and Date or Milestone** — Enter the amount for the fixed fee, and the date on which it should be billed. If milestones have been created for the project, you will be able to select one of these milestones rather than a date, if desired.
- **Repeat billing rule** — You can create a rule with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

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

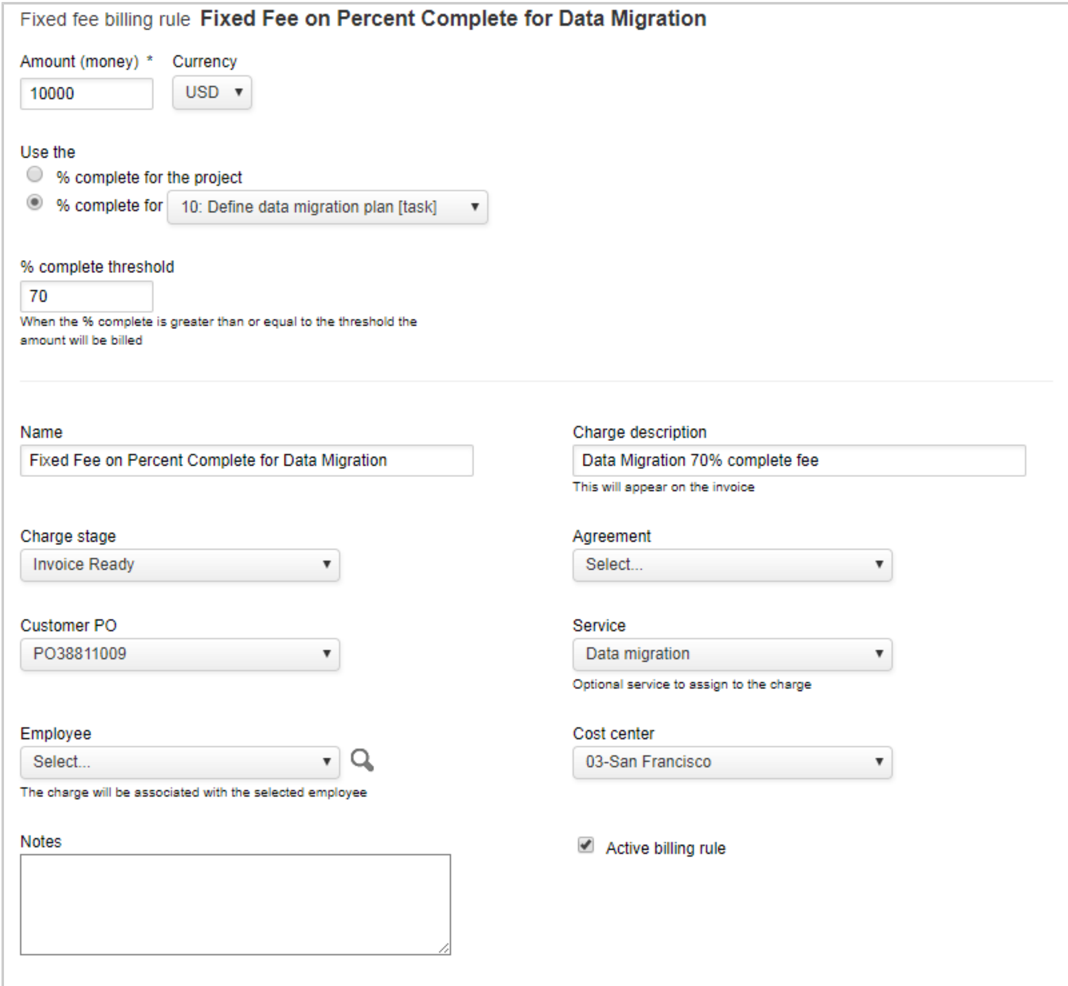
To create a repeating fixed fee:

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



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

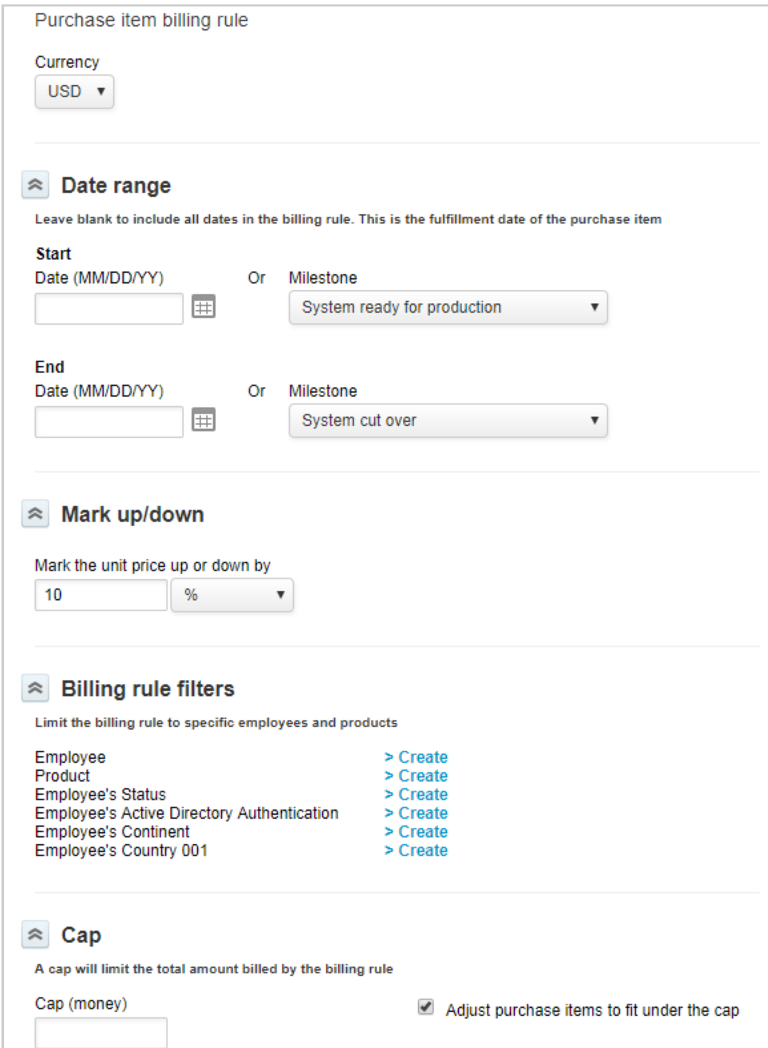
Fixed Fee on Percent Complete Fields



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

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

Purchase Item Billing Rule Fields



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

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

- **Date range** — If needed, enter a start and end date for the time when the billing rule will be in effect. If milestones have been created for the project, you can also select one of these milestones rather than a date.

- **Mark up/down** — Used with expense item billing rules and purchase item billing rules. Use this setting to create billing rules which mark up or mark down expense items in receipts or purchases associated with a project. Enter a markup or markdown as a percentage of the cost, or as a fixed monetary amount. The markdown is applied on a per-unit basis.

  > **Note:** Enter a negative number for a markdown.

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

- **Billing rule filters** — Use these filters to limit the billing rule to certain products. To create a filter for a particular item, click on its ">Create" button. In the dialog box, select the items you want from the "Available items" list, click "Add Selected >", and click OK.

- **Cap** — Set a cap to limit the total amount billed by the billing rule. Purchase item billing rule caps are by money only.

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

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

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

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

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

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

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

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

- **Name** — You can give the billing rule a name. If this field is cleared, a default name will be assigned. The default name has the following format: "[type] billing rule [#]. For example, a new expense item billing rule's default name would be "Expense item billing rule 1".

- **Billing rule position** — Used with time and expense item billing rules. With this option, set the order in which each rule of a specific type (time or expense item) will be applied when you run project billing.

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

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

- **Charge description** — Enter a description of the billing rule, if desired. This description will be added to explanation of each billing rule in the "Rule" column of the "Billing rules" list for the project. It will also appear in the "Description/Notes" field of the item in the resulting invoice.
- **Charge stage** — If you want charges created by the billing rule to be assigned a specific charge stage, choose the stage from this list.
- **Customer PO** — If you want charges created by the billing rule to be assigned to a specific customer purchase order, choose the purchase order from this list. The customer PO must be associated with the project.
- **Service** — Associates a service to any charges created by the billing rule.
- **Notes** — Add a description for the billing rule in this field. The description will appear in list views.
- **Active billing rule** — Clearing this option deactivates the billing rule. It is selected by default.
- **Agreement** — If you want charges created by the billing rule to be assigned to a specific agreement, choose the agreement from this list. The agreement must be associated with the project.
- **Exclude non-reimbursable receipts** — Select this option to exclude non-reimbursable receipts from the billing rule.
- **Exclude non-billable receipts** — Select this option to exclude non-billable receipts from the billing rule. This option is selected by default.
- **Mark up/down** — Use this setting to create billing rules which mark up or mark down purchases associated with a project. Enter a markup or markdown as a percentage of the cost, or as a fixed monetary amount. The markdown is applied on a per-unit basis.

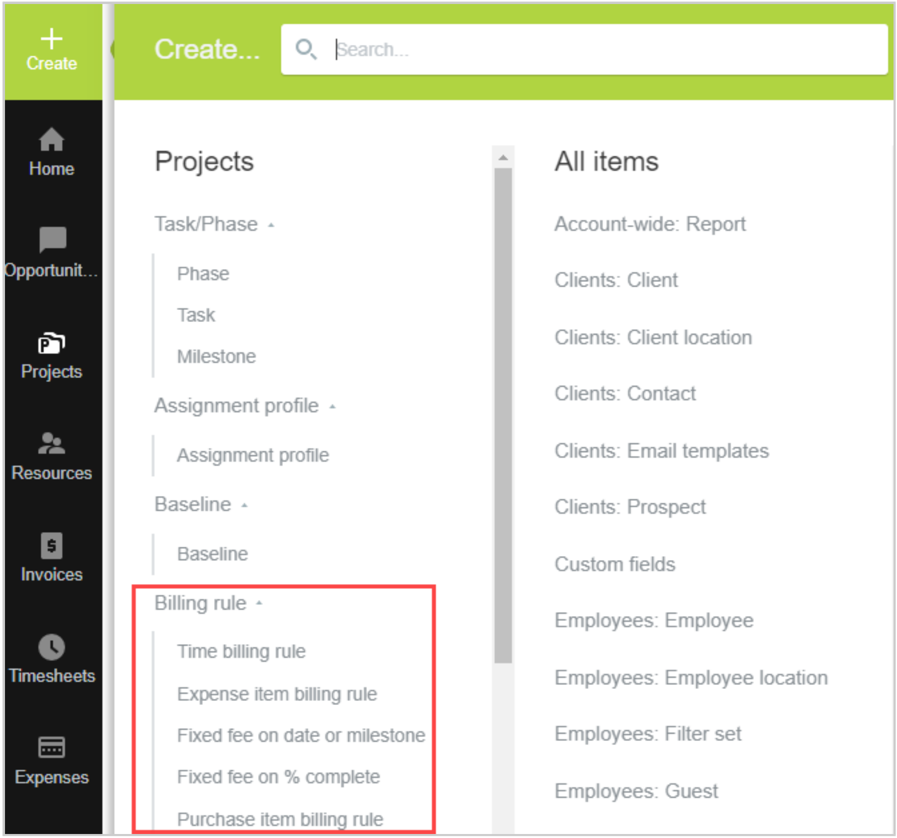
  > **Note:** Enter a negative number for a markdown.

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

Creating, Editing, Copying, and Deleting Billing Rules

To create a billing rule:

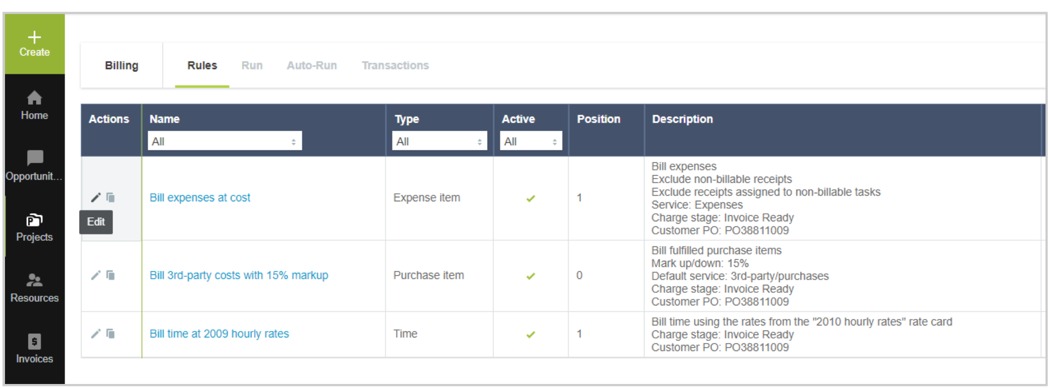
1. Go to Projects > Projects > [select a project] > Financials > Billing > Rules. A list of existing billing rules appears.
2. Click the Create button and click the type of billing rule you want to create under “Billing rule”. A form for the selected billing rule appears.



3. Set the parameters for the billing rule, and click **Save** or **Save & create another**.

To edit a billing rule:

1. Go to Projects > Projects > [select a project] > Financials > Billing > Rules. A list of existing billing rules appears.
2. Click on the name of the billing rule that you want to edit. You can also click the **Edit** icon in the Action column of the list view. The “Billing rule” form appears.

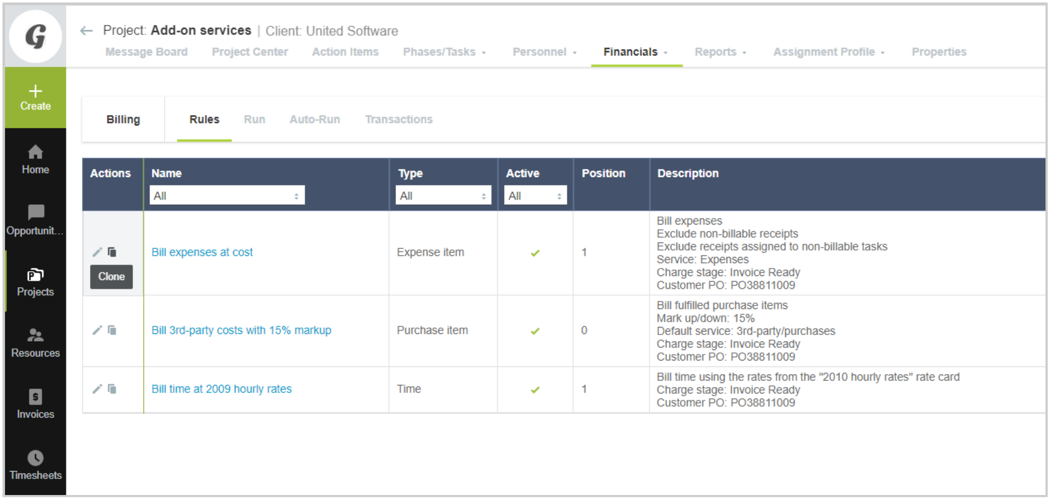


3. Make your changes to the rule’s form and click **Save**.

To copy a billing rule:

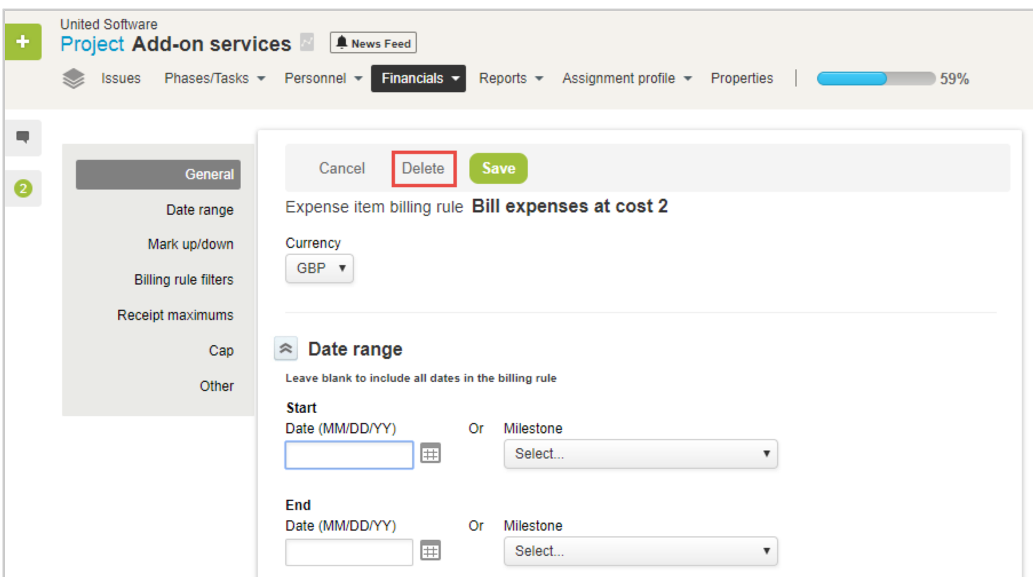
1. Go to Projects > Projects > [select a project] > Financials > Billing > Rules. A list of existing billing rules appears.

2. Click the **Clone** button in the Action column for the rule you want to copy. The billing rule will be duplicated and the copy's Billing Rule form will appear.



To delete a billing rule:

1. Go to Projects > Projects > [select a project] > Financials > Billing > Rules. A list of existing billing rules appears.
2. Click on the name of the billing rule that you want to delete. The "Billing rule" form appears.
3. Click **Delete** at the top of the form.



Note: You cannot delete a billing rule which has associated billing transactions or charges.

Running Billing Rules and Project Billing Transactions

When you run billing, a list of all billable items will be generated based on the billing rules you have set up for the project. From this list, you can select the items you want to turn into charges. These charges can then be used in invoices. The Project Billing Transactions report will also list those items which have been billed. If you subsequently edit one of these charges so that its cost is different from the original billable item, the Project Billing Transactions report will display the original total, the charge total, and the difference between the two. If you delete a charge, the record will still remain in the project billing transactions list, and list the charge total as “0”.

Note: You must create at least one billing rule for the project before you can run billing.

To run a billing rule for one project:

1. Go to Projects > Projects > [select a project] > Financials > Billing and click the **Run** link.

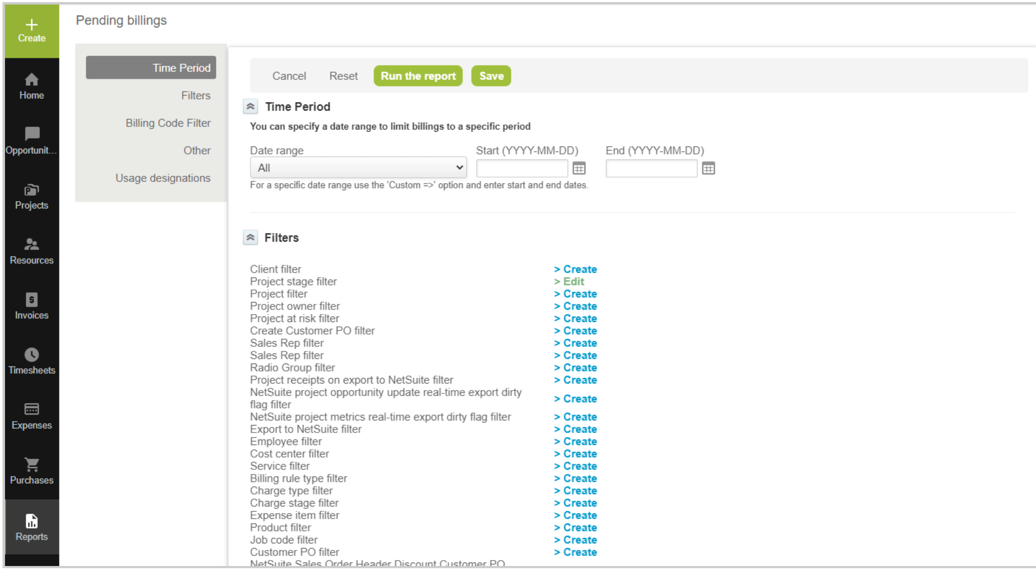
2. If desired, enter a Start date and End date for the billing run. Click **Next**.

Note: The Start and End dates default to the values you entered when you last ran billing for the project.

3. The list of available billable items appears. If no items are billable, a “Nothing is currently billable for this project” message appears. To edit any items in the list, click the date of the billable item you want to change. Make any changes and click **Save**.
4. Select the items which you want to create charges for.
5. Click **Create project billing transactions and charges** at the bottom of the billable items list.

To run billing for multiple projects:

1. Go to Reports > Advanced and click “Pending Billings” in the “Projects” section.
2. Enter the parameters for the report in the Pending billings form.
3. Click **Run the report**. The Pending Billings report appears, and shows all projects which have billings to run.
4. Click the **Tips** button.
5. Click the **Click here** link to create the billings for the projects in the report.



Click the **Transactions** link to see the items which have been billed. The charges which have been generated can also be found at Invoices > Charges. You can run billing again by clicking the **Click here** link to run billing again. You can enter a new set of dates if necessary.

Deleting a Project Billing Transaction

To delete a project billing transaction, you must first delete the charges associated with it.

To delete project billing transactions and their associated charges:

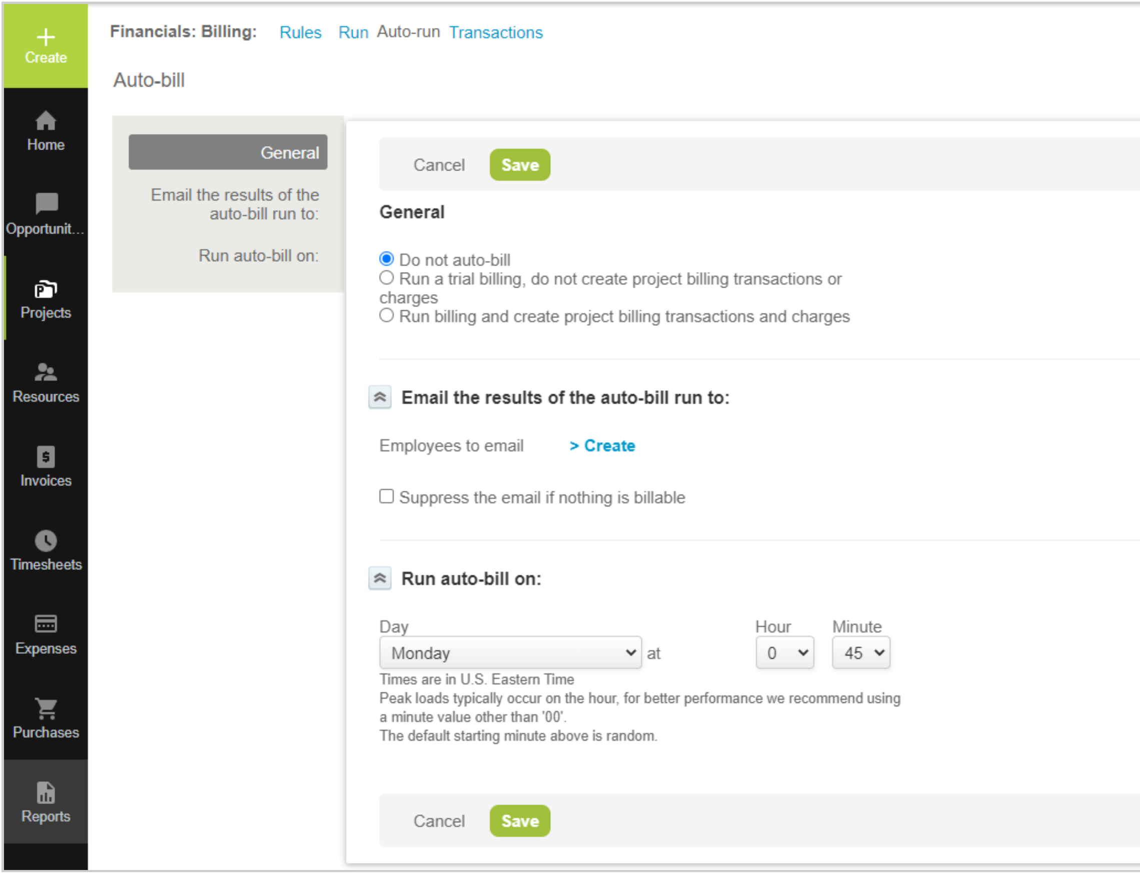
1. Go to Invoices > Charges > [Select a type of charge].
2. Select the charges which you want to delete by selecting their check boxes in the “Run an action” column. To select the entire list of transactions, select the check box in the grey filter row.
3. Click the **Run an action** button at the top of the “Run an action” column. The Actions dialog appears.
4. Select “Delete the selected charges and associated project billing transactions” and click **OK**. The charges and their associated project billing transactions will be deleted.

Auto-Billing

OpenAir includes three options for auto-billing which allow you to simplify your billing workflow:

- **Do not auto-bill** — This is the default option. When selected, OpenAir will not auto-bill.
- **Run a trial billing, do not create project billing transactions or charges** — This option lets you test a billing run without actually creating billing items.
- **Run billing and create project billing transactions and charges** — This option runs billing and creates billing items.

You can set default auto-billing options for project billing rules on an account-wide basis, eliminating a step for project managers when creating new projects.



To configure auto-billing defaults:

1. Go to Administration > Application Settings > Projects > Project Billing Defaults.
2. Set the options for whether to use auto-billing, trial billing, or full billing, set the auto-bill schedule, and select the employees to receive email notifications for the billing results.
3. Click **Save**.

> **Note:** These options will apply only to new projects and will not change the auto-bill settings for any existing projects. Cloned projects will use the auto-billing settings of the original project from which the copy was made, and not the default auto-billing settings.

To run a trial auto-billing:

1. Go to Projects > Projects > [select a project] > Financials > Billing > Auto-run.
2. Select the “ Run a trial billing, do not create project billing transactions or charges” option in the Auto-bill form.
3. In the “Email the results of the auto-bill run to:” section of the form, select the employees who should receive the results of the trial billing in an e-mail message by clicking on the **>Create** or **>Edit** links, selecting the employees from the "Available items" list, and clicking the **Add highlighted items >** button to move them to the "Selected items" list.
4. Select “Suppress the email if nothing is billable” to not send billing and recognition notification emails if no transactions are billable or recognizable.

5. In the “Run auto-bill on:” section of the form, select the day and the time of the week that the trial billing will run. The e-mail messages with the results will be sent as soon as the trial has been run.

    > **Note:** Times are in Eastern Time (UTC –5:00 during Standard Time and UTC –4:00 during Daylight Saving Time)

6. Click **Save**.

To run auto-billing:

1. Go to Projects > Projects > [select a project] > Financials > Billing > Auto-run.
2. Select the “ Run billing and create project billing transactions and charges” option in the Auto-bill form.
3. In the “Email the results of the auto-bill run to:” section of the form, select the employees who should receive the results of the billing in an e-mail message by clicking on the **>Create** or **>Edit** links, selecting the employees from the "Available items" list, and clicking the **Add highlighted items >** button to move them to the "Selected items" list.
4. Select “Suppress the email if nothing is billable” to not send billing and recognition notification emails if no transactions are billable or recognizable.
5. In the “Run auto-bill on:” section of the form, select the day and the time of the week that the billing will run. The e-mail messages with the results will be sent as soon as billing has been run.

    > **Note:** Times are in Eastern Time (UTC –5:00 during Standard Time and UTC –4:00 during Daylight Saving Time)

6. Click **Save**.

Revenue Recognition

The Revenue Recognition feature lets you set up revenue recognition rules for each project individually, and you can also recognize revenue using project billing rules. Each project can have multiple revenue recognition rules, providing flexibility to meet the needs of your company’s current recognition structure. You can also create manual recognition transactions within a selected project, clicking the **Create** button, and selecting **Recognition transaction**.

> **Note:** There are several switches which affect revenue recognition. See Revenue Recognition Switches for the complete list. To enable them, contact OpenAir Customer Support.

To create one of the following recognition rules, click **Create** and select Recognition > [Rule from list below]:

- % Complete
- As Billed
- Expenses
- Fixed amount on date or milestone
- Fixed amount on % complete
- Purchases

- Incurred vs. forecast
- Time project billing
- Balanced Incurred vs. Forecast

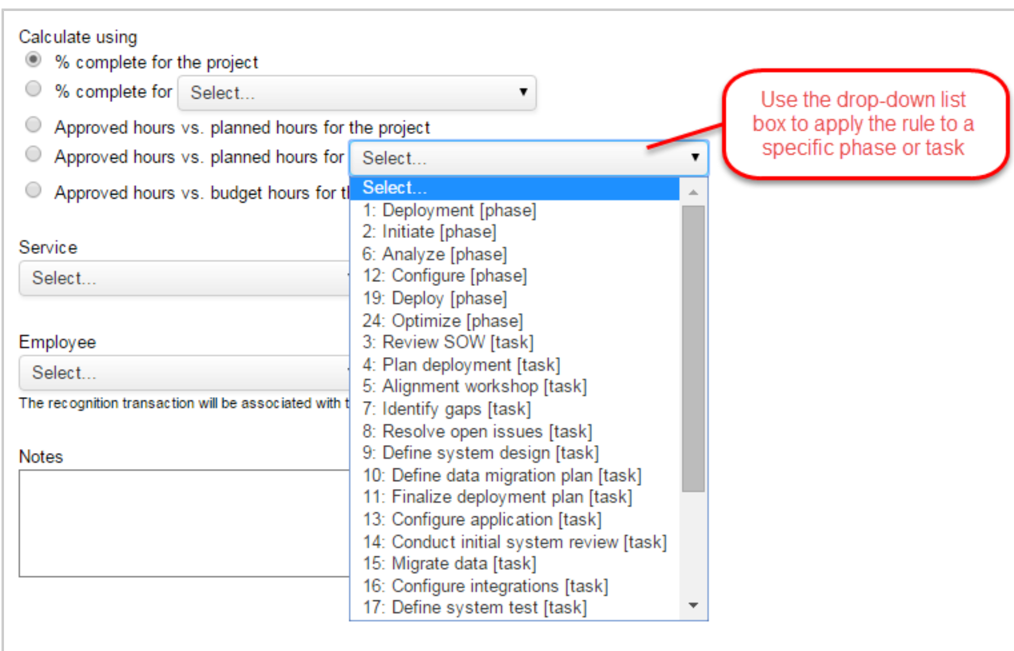
Revenue Recognition Rules

% Complete

This rule recognizes a fixed amount over time based on overall completion of the project. The total amount to recognize can be set in the **Amount** dropdown, and the calculation method can be set in **Calculate using**. You can select the following calculation methods:

- **% complete for the project** — calculated as the total amount set in the rule multiplied by the project's percent complete when the rule was run. For example, when recognizing $50,000.00 for a project which is 11% complete when the recognition is run, a recognition transaction for $5,500.00 is created.
- **Approved hours vs. planned hours for the project** — calculated as the approved hours divided by the planned hours.
- **Approved hours vs. budget hours for the project** — calculated as the approved hours divided by the budgeted hours.

You can apply rules to an entire project, or to elements of it, such as specific phases or tasks, by choosing them in the drop-down list boxes.



As Billed

This rule creates recognition transactions when a charge is created or when a charge is invoiced. It also uses charges which were already created by project billing rules and charges which were already invoiced.

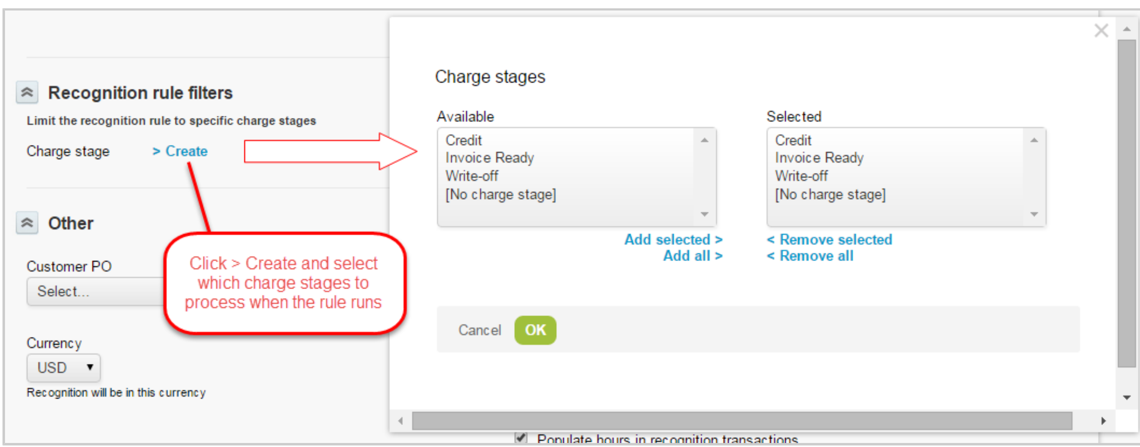
Limit the time period this rule is applied to by setting a Start and End date in the Date range section of the form, or leave these fields blank to include all dates in the recognition rule.

This recognition rule calculates the recognition amounts from already-created charges from billing rules, so you can set filters on the charge types using the **Charge types to exclude** section of the form. You can choose the following:

- Exclude hourly charges
- Exclude flat rate charges
- Exclude other rate charges
- Exclude expense item charges
- Exclude project charges

> **Note:** Expense item charges are automatically excluded if you have created an **Expenses rule**, and product charges are automatically excluded if you have created a **Purchases rule**.

You can also apply filtering rules in the **Recognition rule filters** section of the As Billed form. Click the **> Create** link and select only the charges which you want to process when the recognition rule is run.



In the Other section of the form, if you select an agreement or customer PO, transactions will be set against that agreement or customer purchase order and the drawdown will be reported. Additionally, if you need to report hours recognized, select the **Populate hours in recognition transactions** checkbox.

Expenses

This rule recognizes revenue from expenses, and offers more options than the As Billed rule. It recognizes receipts created in the Expenses module as revenue.

You can set one of several different scenarios to recognize revenue in the **Revenue to recognize** section of the Expenses rule form. The options are:

- **Mark up/down on billed expenses** — recognition on the mark up/down of the receipt when it is billed in the Invoices module.
- **All billed expenses** — recognition based on all receipts billed in the Invoices module.
- **All incurred expenses** — recognition based on all receipts which are currently assigned to the corresponding project.

You can limit the recognition rule to specific users and expense items in the **Recognition Rule Filters** section of the form. You can also restrict values based on associated tax location.

Fixed amount on date or milestone / Fixed amount on % complete

These rules recognize a fixed amount on a set date or upon completion of a milestone/percent completed. Use the drop-down list box under User to select a user to associate the rule with. Enter the remaining information and click **Save**.

Purchases

This rule recognizes revenue based on purchases created in the Purchases module. There are two scenarios to choose from:

- **Mark up/down on billed purchases** — recognition on the mark up/down of the purchase when it is billed in the Invoices module
- **All billed purchases** — recognition based on all purchases billed in the Invoices module.

Incurred vs. forecast rule

This rule recognizes revenue based on how the project is tracking against the ongoing plan by dividing incurred costs by forecast costs and then multiplying by the amount of revenue to be recognized. Incurred and forecast costs can include any combination of labor, expenses, and purchases.

This rule is similar to the percent complete recognition rule; however, while the percent complete rule only uses hours, the incurred vs. forecast rule uses other inputs.

The Incurred portion of the percentage calculation is the numerator. The following items can be included in the Incurred portion:

- **Approved hours multiplied by employee/user cost** — hours approved from timesheets multiplied by the loaded cost
- **Approved receipts** — includes receipts from approved expense reports
- **Fulfilled purchase items** — includes fulfilled purchase amounts

The Forecast portion of the percentage calculation is the denominator. The following items can be included in the Forecast portion:

- **Estimated hours multiplied by user cost** — estimated hours from the project plan multiplied by the loaded cost
- **Approved and booked hours multiplied by the employee/user cost** — approved hours from timesheets and remaining booked hours within the period multiplied by the loaded cost. When you select this option and run the rule, it will find the end date of the last approved timesheet for the user and use that as the cut-off date. The forecast amount will be:

  (Approved time before the cut-off date × Loaded cost) + (Booked time after the cut-off date × Loaded cost)
- **Total planned receipts** — an estimate of the total receipt amount for the project
- **Total planned purchase items** — the same assumption as planned receipts, taking into account purchases instead of expenses

Important: Consider the following guidelines:

- The cut-off date used for **Approved and booked hours multiplied by the employee/user cost** is based on the latest approved timesheet for that user across all projects, and is not restricted to any one project.
- The loaded cost for the employee is set in Administration > Employees > [*Select an Employee*] > Cost. It includes the **Current hourly cost**, which specifies the hourly cost effective today, and any **Historical hourly costs**, which may specify both past and projected hourly cost values effective within a given date range.
  - By default, the **Estimated hours multiplied by user cost** forecast is calculated using the **current hourly cost** for the employee. OpenAir can be configured to calculate the **Estimated hours multiplied by user cost** forecast using the loaded cost effective on the day work is assigned, taking into account both current hourly cost and historical hourly costs.

    To enable this feature, contact OpenAir Customer Support and request the following revenue recognition switch: For incurred vs. forecast recognition rules, use hours from assign by day table for the forecast, instead of planned hours, so that dated loaded cost can be used for the forecast instead of current loaded cost.
  - The **Approved and booked hours multiplied by the employee/user cost** forecast calculation always uses the loaded cost effective on the day work is assigned, taking into account both **current hourly cost** and **historical hourly costs**

Note: When selecting any of the options which use hours multiplied by cost, you can select which cost level to use from the **User cost to use** drop-down list box in the **Other** section of the form. Additionally, you can tie agreements, customer purchase orders, and services to the rule like any of the other recognition rules.

Time project billing rule

Recognizes revenue from charges that have been or would be created by selected time billing rules. This revenue recognition rule can only be created after at least one time billing rule has been created on a particular project. If you try to create the rule without a time billing rule, you will receive a “You must first create at least one Time billing rule” message.

When you’ve created one or more time billing rules for a project, you can select the billing rule or rules which will create recognition transactions when the recognition is run.

Balanced Incurred vs. Forecast Rule

This rule uses true-up transactions to balance out previous accounting periods and adjust your projections to reflect project changes. It is particularly useful when your previously recognized income is more or less than the actual revenue as of the current date.

To use this rule, first enter the amount to recognize, and select whether the rule's calculations are based on bookings or assignments. The calculations are the same for both. Selecting bookings uses bookings for forecasts, while selecting assignments uses assignments for forecasting. Actual time entries are used in both scenarios:

- approved hours are used to calculate actual revenue recognition
- worked hours are used in revenue recognition projection calculations

> **Note:** Whenever worked hours are entered, they are prioritized over booked or assigned hours to more accurately project what is occurring in OpenAir.

It isn't possible to combine both booked AND assigned hours in the same rule.

For the Incurred section of the calculation, you may also plan for expenses and purchases to incorporate approved receipts or fulfilled purchase items, which makes it easier to transfer from the original Incurred versus Forecast rule.

In the Forecast section, define what type of hours (booked/assigned or logged timesheet hours) are used for revenue projection calculations. Two periods are considered in the forecast:

- the past up to and including a set pivot date
- all time after the pivot date

The forecast can use either time entries or booked/assigned hours. Time entries are preferred over bookings or assignments. You can also enter total planned receipts and purchase items into the forecast.

When the rule is run, true-up transactions are used to balance out previous accounting periods when there is more or less revenue to recognize as of today. They can be generated per project or per employee.

Example of the Balanced Incurred vs. Forecast Rule

In December 2015, the following project data exists. The project will run from January 2016 to March 2016. Booked hours, projected cost, and projected revenue are the same for January 2016, February 2016, and March 2016. If there are no changes to Booked or Logged hours, the Actual revenue will match the Projected revenue for the duration of the project.

December 2015		**Total project revenue**	$ 75,000.00	
		User cost	$ 100.00	
	Jan-16	**Feb-16**	**Mar-16**	**Total**
Booked hours	160	160	160	480
Projected cost	$ 16,000.00	$ 16,000.00	$ 16,000.00	$ 48,000.00
Projected revenue	$ 25,000.00	$ 25,000.00	$ 25,000.00	$ 75,000.00

The following formulas are used to determine Projected cost and Projected revenue:

Projected cost = Booked hours x User cost

Projected revenue = (Projected cost / Total Projected cost) x Total project revenue

In February 2016, the Actual revenue for January 2016 has been recorded. In this example, the Actual hours were the same as the Booked hours, therefore the recorded Actual revenue was the same as the Projected revenue in January 2016.

February 2016				
		Total project revenue	$ 75,000.00	
		User cost	$ 100.00	
	Jan-16	Feb-16	Mar-16	Total
Booked hours	160	160	160	480
Actual hours	160			160
Projected cost	$ 16,000.00	$ 16,000.00	$ 16,000.00	$ 48,000.00
Projected revenue	$ 25,000.00	$ 25,000.00	$ 25,000.00	$ 75,000.00
Actual revenue	$ 25,000.00			
Total Revenue	$ 25,000.00			

In March 2016, the project is extended to April 2016, and 320 additional booked hours are added to April 2016. These additional booked hours increase the cost profile for the entire project. If the projected revenue was recalculated in March 2016 with this new data, the projected revenue for each month would be lower for January, February, and March in 2016.

Because the January 2016 accounting period is already closed, the Actual revenue recognized for January 2016 cannot be changed. Therefore, the Balanced IvF rule creates a true-up transaction of ($10,000) in February 2016 to balance the Actual revenue from January 2016.

March 2016					
		Total project revenue	$ 75,000.00		
		User cost	$ 100.00		
	Jan-16	Feb-16	Mar-16	Apr-16	Total
Booked hours	160	160	160	320	800
Actual hours	160	160			320
Projected cost	$ 16,000.00	$ 16,000.00	$ 16,000.00	$ 32,000.00	$ 80,000.00
Projected revenue	$ 25,000.00	$ 25,000.00	$ 25,000.00	$ 30,000.00	$ 75,000.00
New Projected Revenue	$ 15,000.00	$ 15,000.00			
Actual revenue	$ 25,000.00	$ 15,000.00			
		$ (10,000.00)			
Total Revenue	$ 25,000.00	$ 5,000.00			

In April 2016, income is recognized for March 2016. March 2016's booked hours were the same as its actual hours, so the Actual Revenue is the same as the Projected Revenue: $15,000. The rule will not create a balancing transaction for this month.

April 2016		Total project revenue	$ 75,000.00		
		User cost	$ 100.00		
	Jan-16	Feb-16	Mar-16	Apr-16	Total
Booked hours	160	160	160	320	800
Actual hours	160	160	160		480
Projected cost	$ 16,000.00	$ 16,000.00	$ 16,000.00	$ 32,000.00	$ 80,000.00
Projected revenue	$ 15,000.00	$ 15,000.00	$ 15,000.00	$ 30,000.00	$ 75,000.00
Actual cost	$ 16,000.00	$ 16,000.00	$ 16,000.00		
Actual revenue	$ 25,000.00	$ 15,000.00	$ 15,000.00		
True Up Transaction Feb		$ (10,000.00)			
Total Revenue	$ 25,000.00	$ 5,000.00	$ 15,000.00		

In May 2016, it is determined that April 2016's Actual hours (200) were lower than the booked 320 hours. Therefore, the rule will need to create a true-up transaction in April 2016 which will take into account the true-up transaction made in February.

When the rule is run, it recalculates what the Actual revenue would have been if this new April 2016 data had been taken into account using the following multi-step calculation:

1. The rule creates a Revised Actual Revenue for each period it must account for. The formula is:

   (Actual cost for period / Total Actual Cost) x Total project revenue = **Revised Actual Revenue** for period

2. The rule subtracts each accounting period's original Actual revenue from the corresponding Revised Actual Revenue. The formula is:

   Revised Actual Revenue for period — original Actual revenue for period = **Actual Revenue Difference** for period

3. The Actual Revenue Differences for each previous period (January, February, and March 2016 in this example) are summed, and subtracts any previously-recorded true-up transactions, to give the true-up transaction for April 2016. In this example, the sum of ($7,352.94), $2,647.06, $2,647.06, less ($10,000) creates a true-up transaction of $7,941.18 for April 2016.

May 2016		Total project revenue	$ 75,000.00		
		User cost	$ 100.00		
	Jan-16	Feb-16	Mar-16	Apr-16	Total
Booked hours	160	160	160	320	800
Actual hours	160	160	160	200	680
Projected cost	$ 16,000.00	$ 16,000.00	$ 16,000.00	$ 32,000.00	$ 80,000.00
Projected revenue	$ 15,000.00	$ 15,000.00	$ 15,000.00	$ 30,000.00	$ 75,000.00
Actual Cost	$ 16,000.00	$ 16,000.00	$ 16,000.00	$ 20,000.00	$ 68,000.00
Actual revenue	$ 25,000.00	$ 15,000.00	$ 15,000.00	$ 22,058.82	$ 67,058.82
Revised Actual Revenue	$ 17,647.06	$ 17,647.06	$ 17,647.06	$ 22,058.82	$ 75,000.00
Actual Revenue Difference	$ (7,352.94)	$ 2,647.06	$ 2,647.06		
True Up Transaction Feb		$ (10,000.00)			
True Up Transaction Apr				$ 7,941.18	
Total Revenue	$ 25,000.00	$ 5,000.00	$ 15,000.00	$ 30,000.00	$ 75,000.00

The Balanced IvF rule can be limited to specific employees, expense items, time types, or tasks using a standard OpenAir filter.

This rule can only be used with accounts using accounting periods. You can then define which accounting date to use with the rule. We recommend selecting "Use the accounting period specified below" and using the default accounting period.

The Balanced IvF rule includes a "Do not generate recognition projections for already recognized revenue" option, which functions in a similar manner to the original Incurred versus Forecast rule. If selected, the sum of all revenue recognition projections and actuals will always be equal to the revenue recognition amount defined on the rule.

With the Balanced IvF rule, you can also choose to include or exclude booked or assigned hours for users with missing time entries into recognition revenue projection calculations in periods before the pivot date.

> **Note:** This rule also prioritizes using time entries over booked or assigned hours when generating recognition revenue projections. For example, if an employee logs time to a different project than they were originally booked to for a particular period, the calculation will use that employee's logged time rather than their booked time for the recognition calculation.

Finally, other settings allow you to add different "stamps" to generated transactions (for example, service line, agreement, customer purchase order). You can also select which user loaded costs are used in calculations and define if the recognition rule is active or not.

Running Revenue Recognition Manually

When a recognition is run, a list of potential recognition transactions based on the set recognition rules is displayed. You can select items which you want to turn into transactions. Then, you can click **Recognition transactions** to see a list of transactions.

Note: You must have at least one recognition rule for a project before running the recognition.

To manually run Recognition (after creating at least one recognition rule)

1. Select a project and click Financials > Recognition, then click the Run recognition sub-link.
   - Enter a **Start** and **End** date for the revenue recognition run, if applicable. By default, these dates are the values entered when the last revenue recognition was run.
2. Click **Next**. The list of available revenue items appears. If no revenue is available, you will receive a "No recognition transactions are pending for this project" message.
3. If necessary, edit any items in the list. Click on the date of the revenue item you want to change. After making your changes in the dialog box, click **Save**.
4. Select the check boxes next to each item you want to include as revenue recognition transactions.
5. Click the **Create recognition transactions** link.

You can see and edit the items which have been recorded as revenue transactions by clicking the **Recognition transactions** link.

When you have created revenue transactions for a project, revenue information is displayed on the **Financial analysis** report for the project. If you want to re-run the recognition, click the **Click here** link at the bottom of the page. This will give you the option of entering a new set of dates.

Running Revenue Recognition Automatically

OpenAir has three options for automatically running revenue recognition on a timed basis. They are:

- **Do not auto-bill** — this is the default setting
- **Run recognition, do not create recognition transaction** — you can test the recognition run without actually creating revenue items
- **Run recognition and create recognition transaction** — runs recognition and creates recognition transactions

To find the auto-run options for each project, navigate to the project, click the **Recognition** link, and then click the **Auto-run** sub-link. A dialog box containing the three auto-run options will open.

You can set up automatic revenue recognition runs without creating the corresponding revenue items:

To set up a Trial Automatic Revenue Recognition Run

1. Click the **Run recognition, do not create recognition transaction** option in the **Auto-run** dialog.
2. To add users who should receive email messages of the trial run results, click the > Create or > Edit link, select users from **Available items**, and click **Add highlighted items** to move them to **Selected items**.
3. Select the day of the week and time when the trial recognition will run. Email messages with results of the run will be sent as soon as the trial has been run. All times are in U.S. Eastern Time.
4. If you don't want emails to be sent when no transactions are recognized, click **Suppress the email if there is nothing to recognize**.
5. Click **Save**.

You can set up automatic revenue recognition runs which create recognition transactions:

To set up an Automatic Revenue Recognition Run

1. Click the **Run recognition and create recognition transaction** option in the **Auto-run** dialog.

2. To add users who should receive email messages of the trial run results, click the > Create or > Edit link, select users from **Available items**, and click **Add highlighted items** to move them to **Selected items**.
3. Select the day of the week and time when the trial recognition will run. Email messages with results of the run will be sent as soon as the trial has been run. All times are in U.S. Eastern Time.
4. If you don't want emails to be sent when no transactions are recognized, click **Suppress the email if there is nothing to recognize**.
5. Click **Save**.

Revenue Reporting

The reporting values for recognized revenue can be used in reports. Commonly-used reports for reporting revenue based on the previous settings include the following:

- **Account-wide — Projects**
- **Account-wide — Company**
- **Account-wide — Customers**

To set up the captured time range, configure the **Period**, **# of periods**, and **Date** items. Then, choose corresponding fields which should be calculated in the resulting report. The following list are commonly-used Measures:

- **Projects — Actual revenue margin** — money from recognitions minus the cost of approved hours from time entries. Field type: money
- **Projects — Deferred Revenue** — money from all charges minus recognition transactions. Value will never be less than zero. Field type: money
- **Projects — Pending recognition transaction** — money from pending recognition transactions. Field type: money
- **Projects — Pending recognition transaction count** — number of pending recognition transactions. Field type: count
- **Projects — Pending recognition transaction time (Days)** — days from pending recognition transactions.
- **Projects — Pending recognition transaction time (Hours)** — hours from pending recognition transactions.
- **Projects — Projected deferred revenue [rules]** — the difference between money billed and money recognized from recognition projections. Field type: money
- **Projects — Projected revenue [rules]** — recognition projections which were generated using recognition rules. Field type: money
- **Projects — Projected revenue booking margin [rules]** — money from recognition projections which were generated using recognition rules minus the cost of the hours from the bookings. Field type: money
- **Projects — Projected revenue margin cost [corresponding cost][rules]** — revenue minus the cost. Field type: money
- **Projects — Recognition projection count** — number of recognition projections. Field type: count
- **Projects — Recognition projection time (Days)** — days from Recognition projections.
- **Projects — Recognition projection time (Hours)** — hours from Recognition projections.
- **Projects — Recognition transaction count** — number of recognition transactions. Field type: count
- **Projects — Recognition transaction time (Days)** — days from recognition transactions.
- **Projects — Recognition transaction time (Hours)** — hours from recognition transactions.

- **Projects — Recognition revenue** — money from recognitions. Field type: money
- **Projects — Recognized revenue from Expense item charges** — money from recognitions generated from Expense item charges. Field type: money
- **Projects — Work-in-Progress** — money from recognition transactions minus money from all charges. Value will never be less than zero. Field type: money

Detailed Revenue Reports

Separate reports are available for reporting revenue recognition and corresponding values. These reports are:

- **Projects — Recognition rules**
- **Projects — Recognition transactions**
- **Projects — Pending recognition transactions**
- **Projects — Recognition projections**

Projects — Recognition Rules

To view details about all currently created recognition rules, select Reports > Detail > [Projects] > Recognition rules in the old reporting system, or search for and select Projects — Recognition rules in the Next Generation Report Management interface. Set up the date filter for when the revenue recognition was created, either by selecting any predefined time range or using a custom date period.

Projects — Recognition Transactions

To view details about recognition transactions, select Reports > Detail > [Projects] > Recognition transactions in the old reporting system, or search for and select Projects — Recognition Transactions in the Next Generation Report Management interface. Set up the date filter for when the revenue recognition was created, either by selecting any predefined time range or using a custom date period. For this type of report, you can also choose conversions on a different basis in Forex conversions and User loaded cost determination. Any report value which requires a foreign exchange conversion will use that date as the exchange rate date. The date will also dictate the date used for the currency conversion of user-loaded costs for any cost reporting value.

Projects — Pending Recognition Transactions

To view details about pending recognition transactions, select Reports > Detail > [Projects] > Pending recognition transactions in the old reporting system, or search for and select Projects — Recognition Transactions in the Next Generation Report Management interface. Set up the date filter for when the revenue recognition was created, either by selecting any predefined time range or using a custom date period. For this type of report, you can also choose conversions on a different basis in Forex conversions and User loaded cost determination. Any report value which requires a foreign exchange conversion will use that date as the exchange rate date. The date will also dictate the date used for the currency conversion of user-loaded costs for any cost reporting value.

Projects — Recognition Projections

To view a complete overview of current recognition projections, navigate to Reports > Detail > [Projects] > Recognition projections in the old reporting system, or search for and select Projects — Recognition in the Next Generation Report Management interface. Set up the date filter for when the revenue recognition was created, either by selecting any predefined time range or using a custom date period. For this type of report, you can also choose conversions on a different basis in Forex conversions and User loaded cost determination. Any report value which requires a foreign exchange conversion will use that date as the exchange rate date. The date will also dictate the date used for the currency conversion of user-loaded costs for any cost reporting value.

Specialized Revenue Reports

Two reports with pre-defined options are available in Reports > Advanced. These can be used to view pending recognitions and fixed fee projections. These reports are:

- **Pending recognition**
- **Fixed fee projections**

Pending Recognition

This report shows what recognition transactions would be generated if the projection recognition rules were run. You can also recognize revenue on individual projects or across all projects. Included items can be included based on the following:

- **Time period** — choose a date range or start date for the data
- **Filters** — select which data to include or exclude by clicking **Create** or **Edit** and selecting items from the list or using the **Find** feature.
- **Other** — you can choose to **Hide projects with no pending recognition**, select a currency, or **Save this report as ...** to save it with a particular filename.

If there are pending recognition transactions, the project name is hyperlinked. Click this link to view and create recognition transactions for the project. You can also click a link in the Tips menu to create all revenue recognition transactions across all projects with one click.

Fixed fee projections

This report shows total billings or revenue recognition anticipated under the fixed fee rules. It shows the total value of all rules: the amount used (where rules have already been run and transactions created), the percentage of the total used, and the amount remaining. This report can be customized with the following options:

- **Projections from** — select whether you want to run the report on billing or recognition rules. For recognition, both fixed fee on date or milestone and fixed fee on percent complete rules are considered.
- **Approval status** — apply filters as desired by clicking the checkboxes next to them.
- **Time periods** — Future billings or recognition can be broken out by period (specify the period, number of periods, and enter a date within the period where the report should start from).

  Click **Do not move late rules to the first period** to prevent a late rule from being moved to the first period. A late rule is a rule which should have run before the first period.

You can also subtotal information by customer and project.

Merging Slip and Revenue Projection Deltas Using Automatic Backup Service (ABS)

By default, when OpenAir runs slip and revenue projections, it fully generates the slip_projection and revenue_projection tables, with no indication of which records were changed against the previous run.

You can use the **Merge Daily Changes Into Slip Projection and Revenue Projection Tables** feature to generate slip and revenue projections so that changes can be recognized using the standard “created”, “updated”, and “deleted” OpenAir columns. To enable this feature, contact OpenAir Customer Support. Currently OpenAir detects changes only in the following fields:

- transaction_id
- acct_date
- slip_projection_id (only available in the revenue_recognition table)

If other fields are changed, the old row in the slip_projection or revenue_projection table will be flagged as “deleted” (the “deleted” field will change from null to “1”), and the new row will be added to the table.

You can also use the Create Virtual Slip and Revenue Projection Merge Tables feature to download deltas (all new, deleted, and modified transactions) for the slip_projection and revenue_projection tables using Automatic Backup Service. To enable this feature, contact OpenAir Customer Support.

When this feature is enabled, a **Virtual Projection Tables** option is added to the Automatic Backup Service. When this option is selected and ABS first runs, it will create the two virtual tables. ABS then copies the data directly from the slip_projection and revenue_projection tables to these virtual tables. For subsequent ABS runs, updates, additions, or deletions will be applied to these virtual tables. If the feature is disabled, the counter is reset, and when it is enabled again, ABS will recreate the two virtual tables.

You can also manually download these deltas for a selected period. Start and end dates for the deltas can be set in Administration > Global Settings > Account > Integration Import/Export > Export charge projections, Recognition projections deltas. The data file is saved in the same format as ABS MySQL export files, with SQL commands containing “update”, “delete”, and “insert SQL” statements.

Revenue Recognition Switches

The following is a list of Internal Switches which affect the Revenue Recognition feature. To enable any of these switches, please contact OpenAir Customer Support and request the switch or switches you would like to activate.

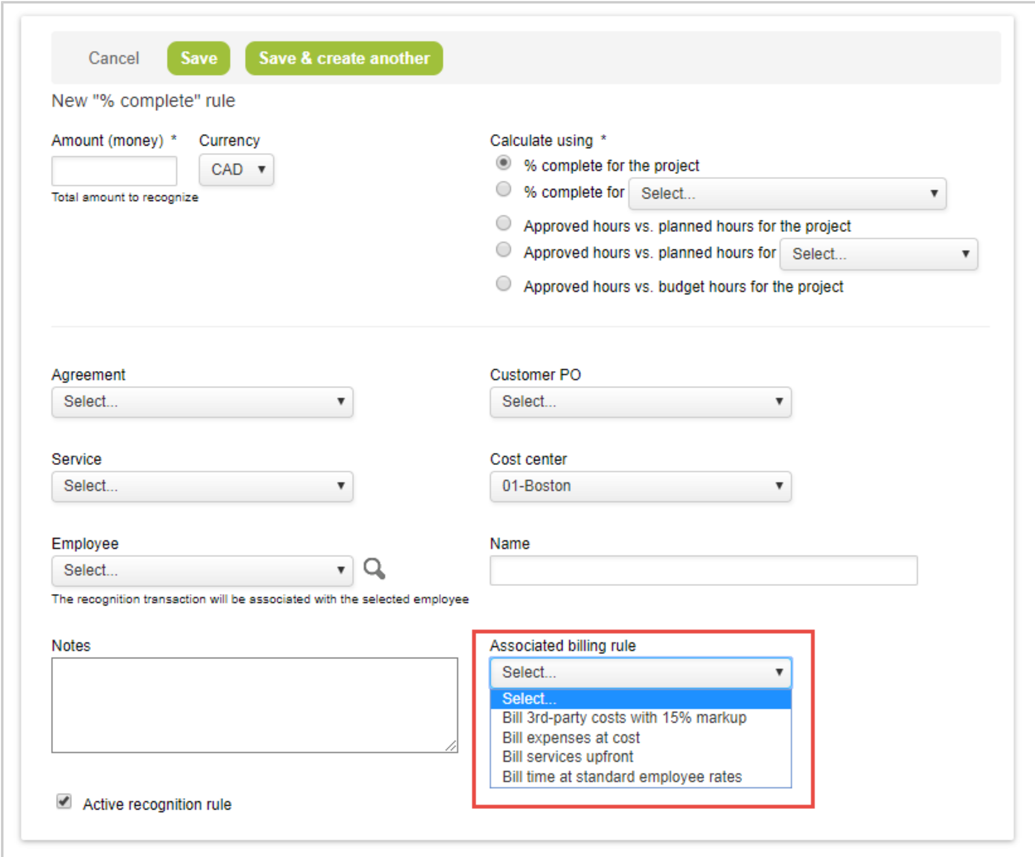
- **Enable centralized recognition feature** — moves **Run Revenue** and the **Revenue Transaction List** to the Invoices module in their own tab. We recommend having OpenAir Professional Services help to deploy this advanced feature.
- **Allow decentralized recognition transactions in conjunction with centralized recognition feature** — maintains a project-specific list of recognition transactions in individual projects. This should only be used with the **Centralized Revenue Recognition** feature.
- **For expenses recognition rules, do not include non-billable receipts when using the All Incurred Expenses option** — ensures that non-billable receipts are excluded when an Expense rule is used with the **All incurred expenses** setting.
- **Disable editing of TimeBills associated with recognition transactions** — TimeBills associated with recognition transactions cannot be modified.
- **Allow tasks as well as phases in % complete recognition rules** — allow tasks and phases to be chosen as options in percent complete recognition rules.
- **Require a service selection in recognition rules** — requires you to make a service selection for all revenue recognition rules. If you do not select a service, the form will produce an error when submitted.
- **Use the date filter end date as the recognition date stamp** — uses the date filler end date as the recognition date stamp. The default behavior uses [Today] as the date stamp.
- **Use only invoiced charges from approved, incremented and sent/viewed invoices for "As Billed" recognition** — only uses charges that are on Approved invoices, with an applied/incremented

number that has also been marked “Sent” for “as billed” recognition. The default setting is to use ALL charges.

- **Use only invoiced charges from approved invoices for "As Billed" recognition** — ensures that only invoiced charges from Approved invoices are used in As Billed recognitions.
- **Use the invoice date for "As Billed" recognition transactions** — uses the Invoice Date for the date of “as billed” recognition transactions.
- **When TimeBill projections use booked hours, use approved and booked hours for incurred vs. forecast recognition rules** — activating this switch and using booked hours for slip projections causes incurred vs. forecast calculations to return the same values as if the “Approve and booked hours multiplied by user cost” was selected in the incurred vs. forecast rule.
- **Use the last day with approved time as the break date for Approved and booked in the Incurred vs. forecast recognition rule** — when looking at incurred vs. forecast recognition, use the last day with approved time as the date for looking back at incurred recognition and forward at forecasted recognition.
- **Enable filtering by booking type in Incurred vs. forecast recognition rules** — permits a booking type filter in leveraging bookings in the forecasted cost calculation. This may be beneficial if the forecast option is configured to use the “Approved and booked hours multiplied by user cost” option and you would like to exclude bookings which have a “Tentative” booking type from the calculation.
- **Enable support to set dates or milestones on the Incurred vs. Forecast recognition rule** — enables support to set dates or milestones on the Incurred vs. Forecast recognition rule
- **Show phases in Task filter on the Incurred vs. forecast recognition rule** — the Projects > [select Project] > Financials > [create Incurred vs. forecast rule] form shows Phase/Task instead of Task in the **Recognition rule filters** section.
- **Disable editing of exported recognition transactions** — prohibits editing of exported recognition transactions.
- **Enable editing of revenue recognition hours** — exposes the “Hours” and “Minutes” fields on revenue recognition transactions from as billed (from time) and time recognition billing rules, as well as manually created revenue recognition transactions.
- **Allow billing rules and recognition rules to be copied when a task is copied** — Allow billing and recognition rules to be copied with tasks.
- **Delete the associated billing rules and recognition rules when a task is deleted** — Delete the associated billing and recognition rules when you delete a task.
- **Add Cost centers to Charges, Project billing transactions, and Recognition transactions** — adds cost centers to charges and revenue recognition transactions.
- **Require a cost center selection in recognition rules** — recognition rules require you to select a cost center. If a cost center isn’t selected, the form will display an error when submitted or saved.
- **The user can un-export recognition transactions** — lets users un-export recognition transactions.
- **The user can mark recognition transactions exported** — lets users mark recognition transactions as exported.
- **Use approved hours instead assigned hours in the approved type percent complete revenue recognition projections** — use approved hours instead of assigned ones for approved type percent complete revenue recognition projections.
- **Respect the dates filtered on 'incurred vs. forecast' rule when generating revenue recognition transactions** — Include only the approved time entries, approved expenses and fulfilled purchase items for the specified date range when generating revenue recognition transactions using 'incurred vs. forecast' recognition rules.

> **Note:** Enable this switch, for example, if you run revenue recognitions for the previous month (e.g. November) a few days into the current month (e.g. December 6) and you only want to include approved time entries, approved expenses and fulfilled purchase items for the previous month (e.g. November 1–30) in revenue recognition transactions.
>
> - With this switch enabled, only the approved time entries, approved expenses and fulfilled purchase items entries up to and including the specified end date (e.g. November 30) will be included in revenue recognition transactions.
> - If the switch is not enabled, revenue recognition transactions include all approved time entries, approved expenses and fulfilled purchase items up to and including the date you run the revenue recognition (e.g. December 6). This may include not only approved time entries, approved expenses and fulfilled purchase items for the previous month (e.g. November) but also for the current month up to the date you run the revenue recognition (e.g. December 6).

- **Use only bookings with the following approval statuses for % complete recognition projections** — only bookings with the selected approval statuses are used to calculate % complete revenue recognition projections.
- **Enable Recognition transaction and Recognition projection date filters in summary reports** — shows an additional Date Filters section for Recognition and Recognition Projection Values in summary reports.
- **Enable the feature to exclude specific projects from projections using custom field exclude_from_projections** — lets you create an “exclude_from_projections” custom field in a project’s properties. You can check this field to disable projections built with this particular project.
- **Show Billing Picklists on Revenue Recognition Transactions** — This feature allows you to choose which revenue recognition rule forms display a billing rule pick list. When you select a billing rule from this field, the billing rule is linked to the revenue recognition rule. This setting does not affect when billing or revenue recognition rules are run. Billing Rule IDs on revenue recognition rules can be accessed using the XML or SOAP APIs.



- **For incurred vs. forecast recognition rules, use hours from assign by day table for the forecast, instead of planned hours, so that dated loaded cost can be used for the forecast instead of current loaded cost** — By default, the **Estimated hours multiplied by user cost** forecast is calculated using the current employee hourly cost. With this optional feature enabled, the forecast is calculated using the loaded cost effective on the day work is assigned. The forecast calculation uses both the current hourly cost and the historical hourly costs set in Administration > Employees > [*Select an Employee*] > Cost.

Issues

To use the issues feature, you must enable it.

To enable the Issues feature:

- Navigate to Administration > Application Settings > Projects > Other settings and select the switch **Enable project issues**.

The Issue functionality within OpenAir provides you with the ability to maintain and manage issues encountered on projects. There are a number of components that are available for the configuration of an issue as well as the tracking needs defined by your business requirements.

Issues can only be created from within the project for which the issue is being entered. Issues may be updated, however, directly from the Issues tab of the Projects application. Action items can be reported upon directly in the application.

Display issues by selecting Issues > and select either pending, completed, or all. Issues are also displayed and linked to a project. Select Projects > Project > Issues.

There are a number of ways to define issues and they include categories, severities, sources, stages, and statuses.

To create an Issue:

1. Go to Projects > Projects and select the specific project.
2. Select **Issue** from the **Create Button**.
3. Enter the New issue form information.
4. Click Save.

You can also quickly create new Issues using existing ones' information. While in the Issues list view, click the **Duplicate** option next to the Issue you would like to duplicate.

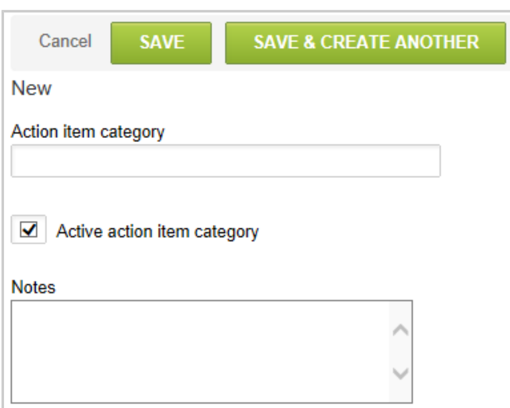
To view and update Issues:

1. Go to Projects > Projects and select the specific project.
2. Select the Issues tab.
3. Click the **Edit** or **Report** link for the issue.

Refer to the following for a description of each issue component and guidelines for creating them:

- Issue Categories
- Severities
- Sources
- Stages
- Statuses

Issue Categories

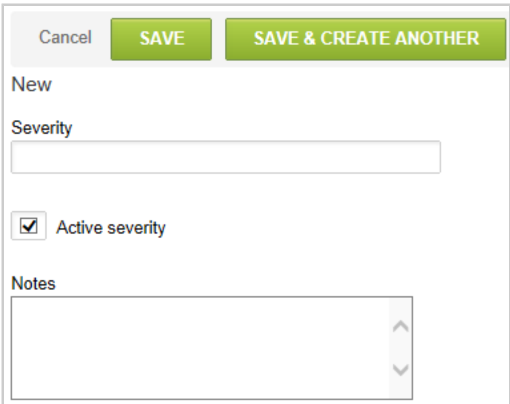


Issue categories indicate the areas within a project that are impacted by the issue or the type of issue identified. The category may be at a very high level such as Issue or Risk. They may also be at a more defined level such as Documentation, Product, Usability, and Training. You can also add notes describing the issue category. Issue categories, after they have been defined, may be inactivated and reactivated at any time.

To create Issue categories:

1. Go to Administration > Application Settings > Projects > Issue categories. Select **New Issue category** from the **Create Button**.
2. Complete form information and click Save.

Severities

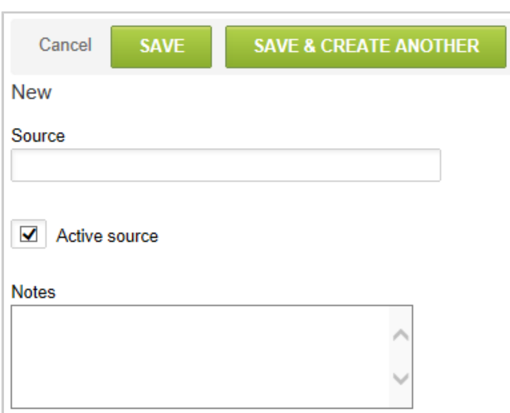


Severities designate how serious or critical the issue is in terms of impacting a deliverable, the project plan or other key elements of the project. Possible values could be Low, Medium and High or use of a numeric scale (e.g., 10 is severe impact and 1 is slight impact). You can also add notes describing the severity. Issue severities, after they have been defined, may be inactivated and reactivated at any time.

To create severities:

1. Go to Administration > Application Settings > Projects > Severities.
2. Select **New Severity** from the **Create Button**.
3. Complete form information and click Save.

Sources

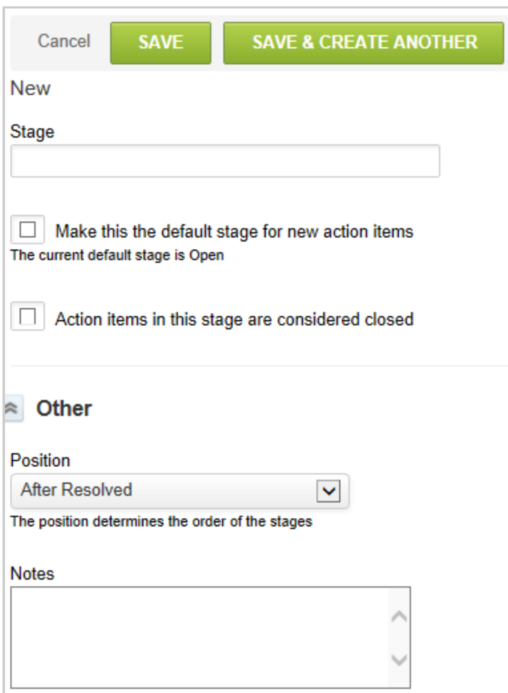


Sources identify the person, team, or area that submitted the issue for the project. Examples are: Project Manager, Team Member, Customer Lead or Test Results. The issue source provides another filter and reporting option for classification of the issues reported. You can also add notes describing the issue source. sources, after they have been defined, may be inactivated and reactivated at any time.

To create sources:

1. Go to Administration > Application Settings > Projects > Sources.
2. Select **New Source** from the **Create Button**.
3. Complete form information and click Save.

Stages



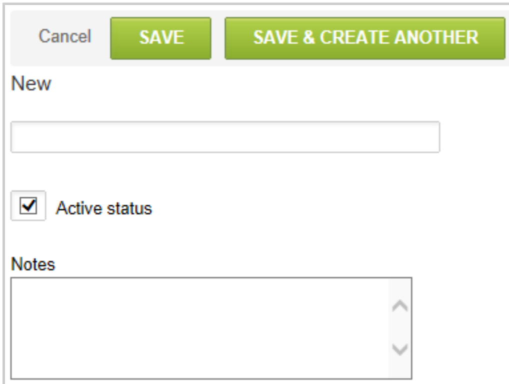
Stages designate where the issue is in the process. Sample stage values could include: Open, Assigned, On Hold, In Work and Resolved. You can select via check boxes whether this stage is the default assigned to new issues and whether issues are considered closed when in this stage. Typically an Open stage is selected as the default for new issues and the Resolved stage is selected as the stage for issues to be considered closed. You also designate where the stage value displays in the list of issue stages. A notes field is available for issue descriptive material.

> **Note:** An issue stage may not be inactivated after it has been defined. It may be deleted altogether provided no issues are in the stage.

To create stages:

1. Go to Administration > Application Settings > Projects > Stages.
2. Select **New Stage** from the **Create Button**.
3. Complete form information and click Save.

Statuses



Statuses provide a means to identify the overall health of the issue. Sample statuses are: Red (critical), Amber (on watch list) and Green (no known problems). You can enter as many status values as are necessary for your company's needs. Using the sample values noted above, a Red status could mean that the issue will impact project timelines. An Amber status might mean the issue should be monitored to avoid impact to the project.

You can also add notes describing the status. Statuses, when defined, may be inactivated and reactivated at any time.

To create a statuses component:

1. Go to Administration > Application Settings > Projects > Statuses.
2. Select **New Status** form the **Create Button**.
3. Complete form information and click Save.

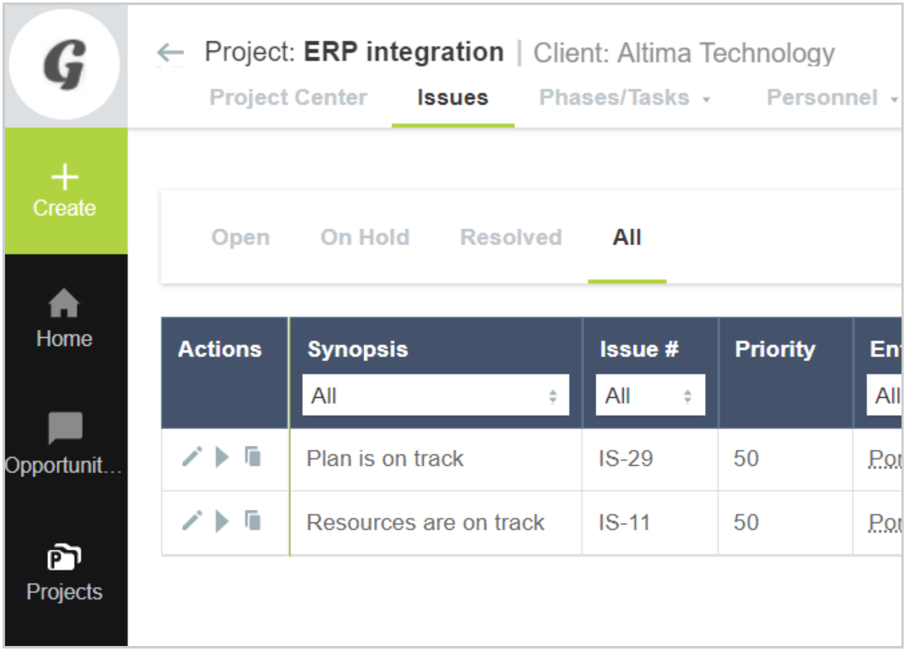
Downloading Issue Attachments in List Views and Bulk Actions

You can download issue attachments without having to open each issue to download files individually, and use bulk actions to download all attachments for multiple selected issues.

To download issue attachments from a list view:

1. Click the Download icon in the “Action” column of the Project Issues list view.

Note: If an individual issue contains multiple attachments, OpenAir will download all the attachments for that issue into one ZIP file.

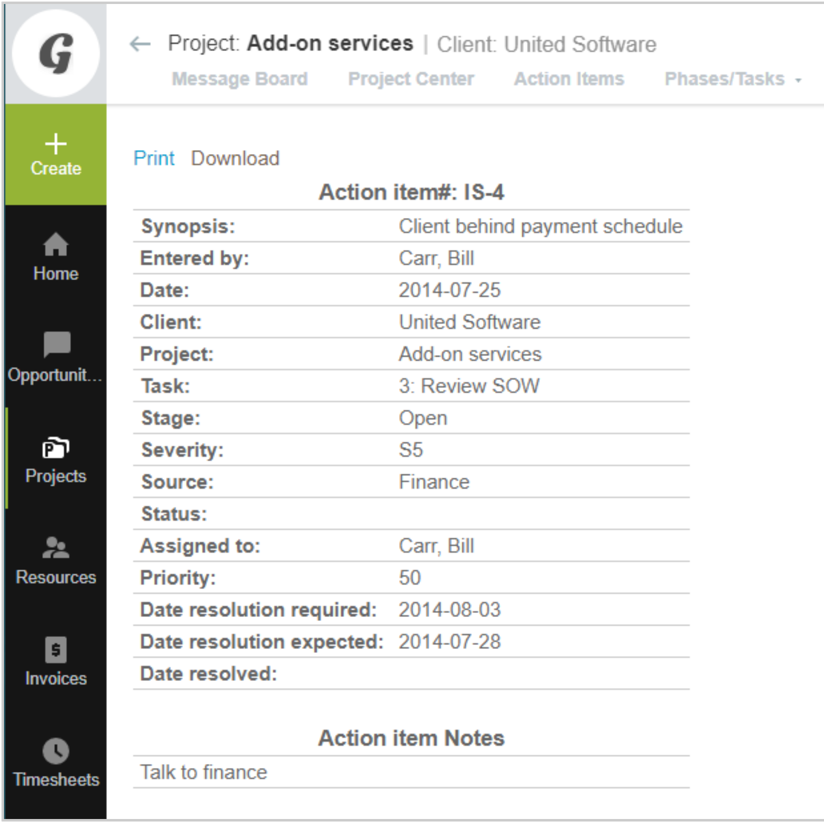


To download attachments from more than one project issue at one time:

1. 1. Go to Projects > Issues> [select an issue list view].
   2. Add the "Run an action" column to the list view.
   3. In the "Run an action" column, select the issues which you want to download attachments from.
   4. In the "Action" dropdown list, select "Download selected".

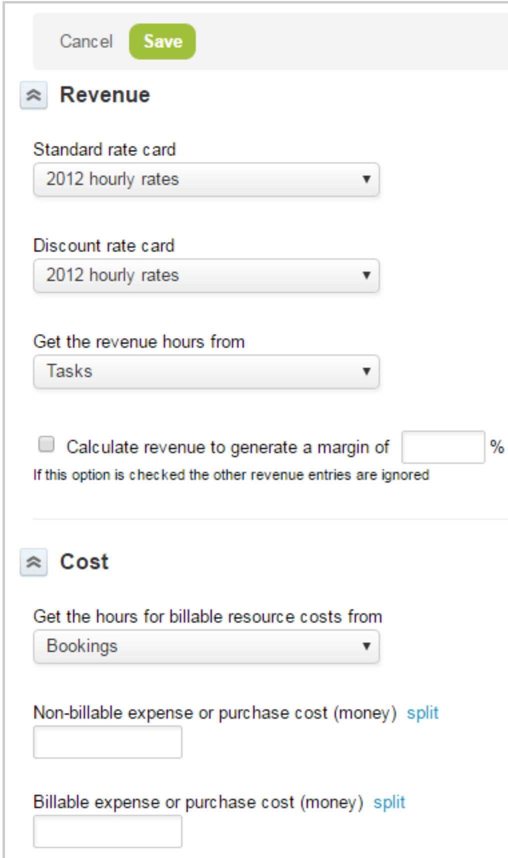
   Note: OpenAir will download all the attachments for the selected issues into one ZIP file.

 OpenAir



Pricing

Project pricing lets you create pricing estimates for specific projects based on different staffing, rate, and time required scenarios, and automatically view the key financial analysis for those scenarios.



The Pricing feature is displayed as a link within a project if pricing is enabled within the project stage. See Project Stages. The options available are determined by the pricing scenarios that are set up within the project.

Financials: Pricing: Scenario

Use the Pricing Scenario form to set up pricing scenarios for your project.

Create a Pricing Scenario

1. Go to Projects > Projects > [select a project] > Financials > Pricing. The “Scenario” form opens.
2. In the Revenue section, select the rate cards you wish to use to determine revenue based on standard and discounted rates. The analysis will show both the gross revenue (from the standard rate card) and the difference in the discounted rate card.
3. The "Get the revenue hours from" field determines the revenue portion of the analysis. Choose "Job code estimates" for a high-level, job-code-based labor revenue estimate, "Bookings" for a more detailed estimate, or Tasks for the most granular estimate. (If you want to split revenue over time, you must select "Bookings.")
4. Select “Calculate revenue to generate a margin of” if you would like to ignore revenue entries and instead calculate your scenario’s revenue by a percent margin. Enter the percent margin you want generated in the text field (do not include the % sign).
5. The "Get the hours from billable resource costs from" field determines the labor cost portion of the analysis. Choose "Job code estimates" for a high-level, job-code-based labor cost estimate, "Bookings" for a more detailed estimate, or Tasks for the most granular estimate.

6. If you have enabled multi-currency functionality, select the currency for the scenario.
7. If desired, choose a percent probability of closing from the dropdown menu. This will be used when running the "Pricing analysis" Advanced project report.
8. Check the “Staffing approved” and “Finance approved” boxes to indicate if this scenario has been approved by Finance or Staffing functions. These check boxes will only be visible to users whose roles are set up to modify finance or staffing approval for project pricing.
9. Select “Use worked hours for prior months” to use actual worked hours to calculate the scenario instead of booked or assigned hours when actual hours are available.
10. Enter any desired notes, and click “Save”.

Other gross revenue, investment absorptions, other billable costs, non-billable resource costs, and non-billable expense costs can all be individually spread out over time.

Split Pricing Scenario Amounts Over Time

1. Go to Projects > Projects > [select a project] > Financials > Pricing > Scenario. The “Scenario” form opens.
2. Set up the Revenue section of the Pricing Scenario form as in Create a Pricing Scenario.
3. In the Cost section of the Pricing Scenario form, click the “split” link next to either the “Billable expense or purchase cost (money)” or “Non-billable expense or purchase cost (money)” fields. The form will change to show “Date” and “Amount (money)” fields for each billable or non-billable expense or purchase cost.
4. For each section where you want to split the amounts over time, select the date and corresponding amount of money that you want to allocate for that time period. The first time period defaults to today's date. Note that for every date you choose, you must have a corresponding dollar amount or you will get an error message when you try to save the Scenario.
5. For any section whose amounts you do not wish to split over time, either delete the initial date or click the "un-split" link for that section. The form will refresh without the Date and Amount fields for that section only.
6. You can add additional Date/Amount rows to any section from the "Add rows" dropdown box.

Financials: Pricing: Job Code Estimates

Job code estimates enable you to specify the position levels or jobs required to complete the project, the number of individuals performing each job, and the average number of hours each of them will work. By combining this information with the rates and adjustments established in the Scenario section, you can run financial analyses on various estimate scenarios.

Create a Job Code Estimate

1. Go to Projects > Projects > [select a project] > Financials > Pricing > Job code estimates. The “Job code estimate” form opens.
2. Select a job code from the “Job code” dropdown list.
3. Enter the number of employes who will be deployed on the project at that job level in the “# of employees” field.
4. Enter the average number of hours each of these individuals will work in the “Hours per employee” field.

5. Repeat steps 2 through 4 for each additional job code. If you need to add more rows to the grid, click the "[Add rows]" dropdown list and select the number of rows you would like to add. You can choose from "3 more", "6 more", or "9 more" rows.
6. Click "Save".

Financials: Pricing: Analysis

You can see a financial snap shot of your scenario by clicking on the "Analysis" link. The snap shot includes key revenue and cost parameters, discounts, profits and margins. By default, the analysis applies to the entire period of the project.

The weighted net revenue line represents net revenue weighted by the closing probability entered in the pricing scenario setup.

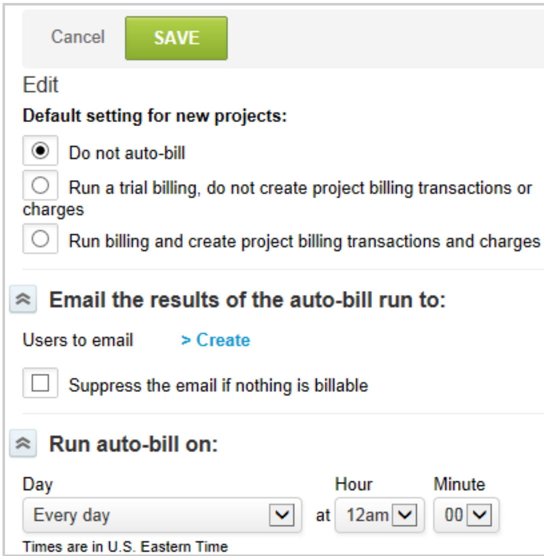
The snap shot dropdown menu lets you save a snap shot of the current analysis. You can also view previously created snap shots. To create a snap shot, select "> Create a snap shot" from the dropdown menu and enter a name in the window which opens. You can also select whether it is based on an approved budget. To view an existing snap shot, select the appropriate snap shot from the menu.

When viewing a snap shot, you can change the name of the snap shot or delete it by selecting "Edit this snap shot" from the dropdown menu and clicking the appropriate button on the window that pops up.

> **Note:** Note: If you are analyzing a "Bookings" Scenario, you can choose to split the analysis over time periods. To do so, click the "Analysis options" link, select a time period from the dropdown menu, and the start and end dates for the analysis. If you check the "Total by period" box, the report will show subtotals for each period, the total for the range specified and the total for the entire project.

- Click the "Analysis options" link to adjust the following settings:
  - Choose to use Total by period
  - Include hourly detail by employee
  - Define the period length and its start and end dates
  - Set the Loaded hourly cost using Primary loaded costs, Secondary loaded costs, or Tertiary loaded costs
- Click the "Print" link to open the Analysis in a more printer-friendly format.
- Click the "Print budget view" link to download PDF versions of your scenario's summary or details with fields for Customer Approval.
- Click the "Download" link to download your analysis as a CSV-formatted or HTML-formatted file.

Project Billing Defaults



Set the project billing default options for new projects. These options do not change the billing settings for any existing projects.

When using project billing rules within OpenAir, you may set a global project billing defaults option for running billing rules and sending results to a defined individual. The default settings for new projects include: Do not auto-bill; Run a trial billing, do not create project billing transactions or charges; Run billing and create project billing transactions and charges. You can create a list of employees to email results of the auto-bill run to and you can schedule the billing option to run at a defined day and time. Optionally, you can suppress the email if results do not include billable items.

Note: Any project billing default options can be overridden within an individual project by using the auto-bill feature within the billing link of the project.

To access and modify the Project billing defaults:

1. Go to Administration > Application Settings > Projects > Project billing defaults.

Do not auto-bill — This option does not run the billing rules automatically. This does not impact forecasting, which is handled by charge projections, nor invoicing, which can be done using a manual billing approach. For more information on charge projections, see Charge Projections.

Run a trial billing, do not create project billing transactions or charges — This option does not run the billing rules automatically but does simulate running the rules to get an estimated billing value. No billing transactions or invoice charges are generated, only the trial billing value. An email is sent for each project that has a trial billing amount. This does not impact forecasting, which is handled by charge projections, nor invoicing, which can be done using a manual billing approach. For more information on charge projections, see Charge Projections.

Run billing and create project billing transactions and charges — The billing rules are run automatically and generate billing transactions and invoice charges. This does not impact forecasting since it is handled by charge projections. For more information on charge projections, see Charge Projections.

> **Note:** All times set are US Eastern Time regardless of your employee specific preferred time zone. After Project billing options are set up within OpenAir, they become the default billing options for all new projects.

Project Budget

The Project Budget feature lets you draw a detailed budget for labor, expenses, and purchases associated with your project and track expenditure at the task, phase, or project level.

The feature lets you:

- Create budgets based on cost or billing.
- Keep different versions of the same budget. Budgets are archived automatically as new budgets are approved.
- Get an overview of project expenses and profitability. View budgeted totals as well as monthly, quarterly, category-level, and task-level details.
- Submit multiple budgets for approval for the same project, compare up to five budgets side by side and approve the most realistic scenario.
- Compare your project expenditure (actuals) against planned budgets.
- Identify budget variances with customizable color coding for budget items that are on or off target, based on the percentage of planned versus actual expenditure.

To enable this feature, contact OpenAir Customer Support. OpenAir Customer Support can also enable related optional features and change related configuration settings.

- The Task on Purchase Request optional feature lets you add task-level granularity for purchase requests and items.
- An optional feature lets you add **Estimate to Complete (ETC)** and **Estimate at Completion (EAC)** columns to total columns in the budget, actuals, and compare screens. The ETC and EAC values are calculated automatically when you save changes to your project budget.

  For more information, see the help topic Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets.
- Your account can be configured to let you compare actual project costs against different project budget scenarios:
  - Normal, Optimistic, Pessimistic, Most Likely scenarios using a three point estimate (triangular or double-triangular distribution).
  - Normal, Optimistic, Pessimistic scenarios using a simplified contingency factor. The contingency factor setting lets you define optimistic and pessimistic scenarios for each project as a percentage of the planned costs. See Creating a Project Budget or Modifying Project Budget Properties.

After you enable the feature, you can:

- Enable project level approvals for project budgets. See Approval Options.
- Set account-wide preferences for the Project Budget feature, including color coding for budget variances. See Account-Wide Project Budget Preferences.

See the following help topics:

- Project Budget List View

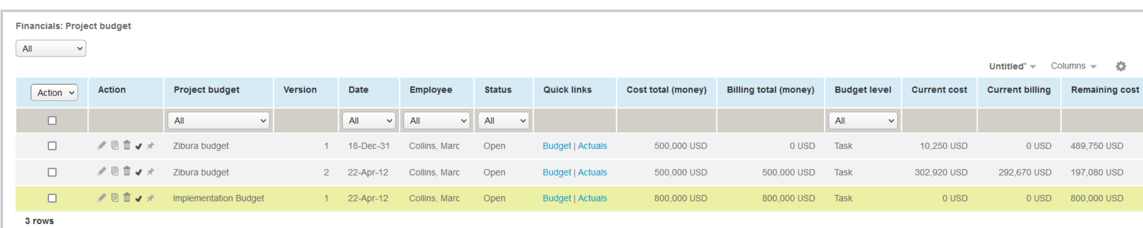
Project Budget List View

The project budget list view lets you view the list of project budgets associated with the project. To view the project budget list, go to Projects > Projects > [*Select a project*] > Financials > Project Budget.

- Click the Edit icon to modify the project budget properties.
- Click the Copy icon to duplicate the project budget.
- Click the Delete icon to delete the project budget.
- Click the Submit icon to submit the project budget.
- Click the Pin icon to mark the project budget as baseline. The baseline budget is used as the main reference for comparison against incurred project costs (actuals) and other budgets for the same project in reports. Only one budget with any approval status can be marked as baseline for each project. Baseline budgets are indicated with a green check mark under the Baseline project budget column in the list view.

> **Note:** The baseline budget functionality requires the Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets optional feature to be enabled for your account. Users must have the **Allow the user to set a project budget as a baseline** role permission to mark a budget as baseline.

- Click **Budget** to view and modify the project budget.
- Click **Actuals** to compare incurred project costs against the planned budget (for cost-based budgets), or actual values from charges and invoices against the planned budget (for billing-based budgets).


Financials: Project budget

All

Untitled* Columns

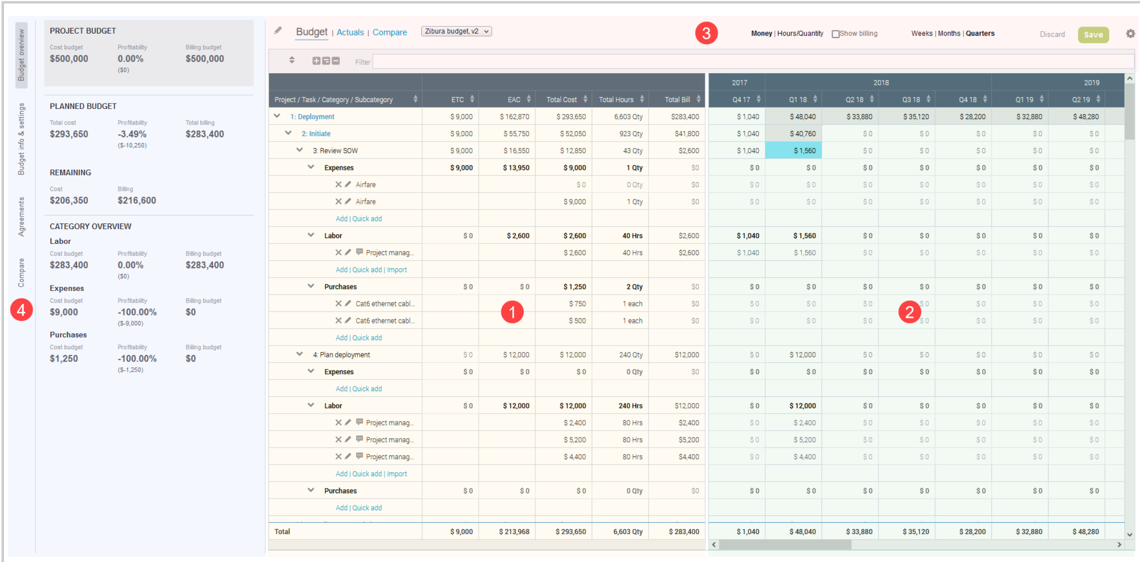
Action	Action	Project budget	Version	Date	Employee	Status	Quick links	Cost total (money)	Billing total (money)	Budget level	Current cost	Current billing	Remaining cost
		All		All	All	All				All			
		Zibura budget	1	18-Dec-31	Collins, Marc	Open	Budget | Actuals	500,000 USD	0 USD	Task	10,250 USD	0 USD	489,750 USD
		Zibura budget	2	22-Apr-12	Collins, Marc	Open	Budget | Actuals	500,000 USD	500,000 USD	Task	302,920 USD	292,670 USD	197,080 USD
		Implementation Budget	1	22-Apr-12	Collins, Marc	Open	Budget | Actuals	800,000 USD	800,000 USD	Task	0 USD	0 USD	800,000 USD

3 rows

Project Budget Page

The project budget page lets you view and edit budgeted project costs over the span of the project, view actual incurred costs, and compare multiple budgets.

To view a project budget, go to Projects > Projects > [*Select a project*] > Financials > Project Budget and click **Budget** or **Actuals** under Quick links.



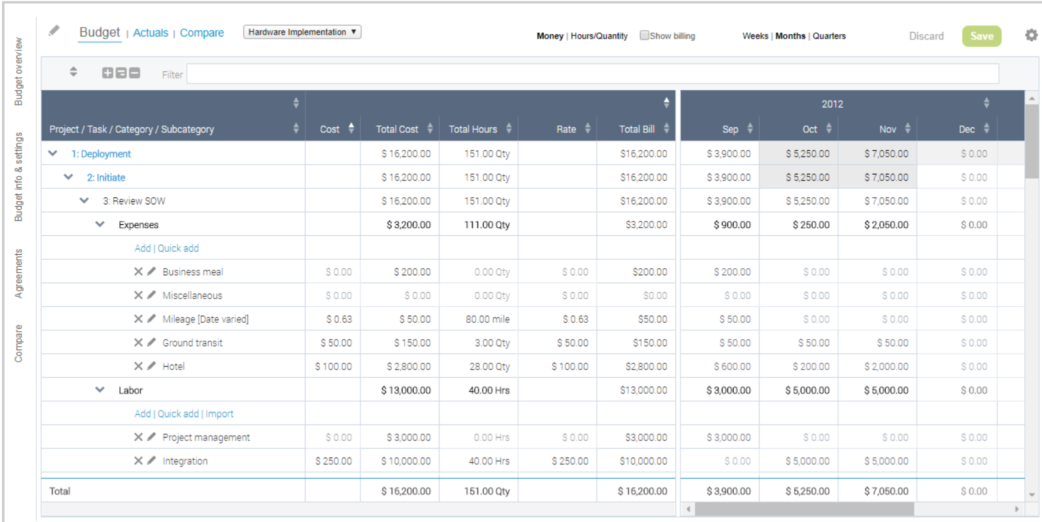
The project budget page includes the following elements:

1. Summary grid — The left side of the budget grid shows the work breakdown structure for your project, the project costs under Expenses, Labor and Purchases categories, totals and other summary fields. You can add entries under all three categories directly from the grid and import labor entries from task assignments or bookings.
2. Time grid — The right side of the budget grid shows a detailed breakdown of your budget per week, month or quarter over the span of the project.
3. Toolbar — Switch between a view showing the budgeted costs, a view showing actual incurred costs, or a view comparing multiple budgets (see Budget, Actuals and Compare Views). Control view options such as the time granularity, the type of values shown (monetary or time and quantity, cost-based or billing-based, along with other list tools (See Project Budget Toolbar).
4. Information and Settings panel — Vertical tabs include summary information related to your budget and additional settings and controls. See Information and Settings Panel.

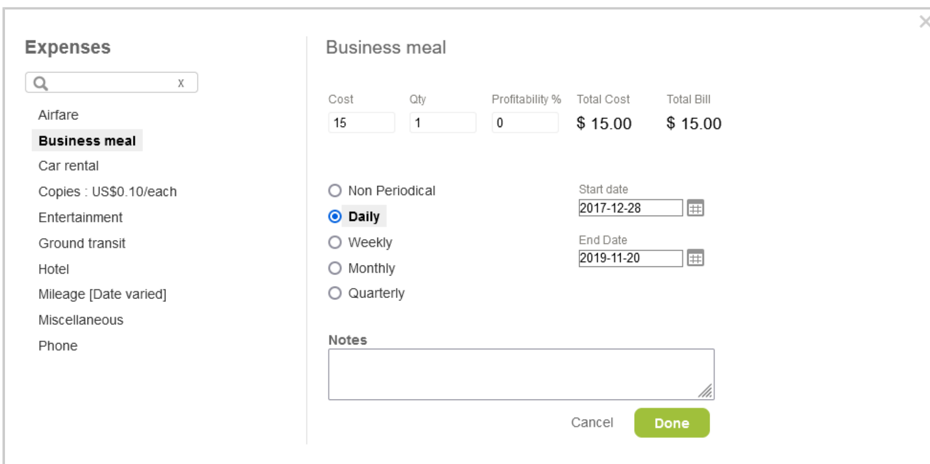
Budget, Actuals and Compare Views

The project budget page lets you switch between a view showing the budgeted costs, a view showing actual incurred costs, or a view comparing multiple budgets.

- Budget View — Click **Budget** in the toolbar to show budgeted costs. You can add or modify budget items directly from the summary grid, and edit values for each item in the time grid.

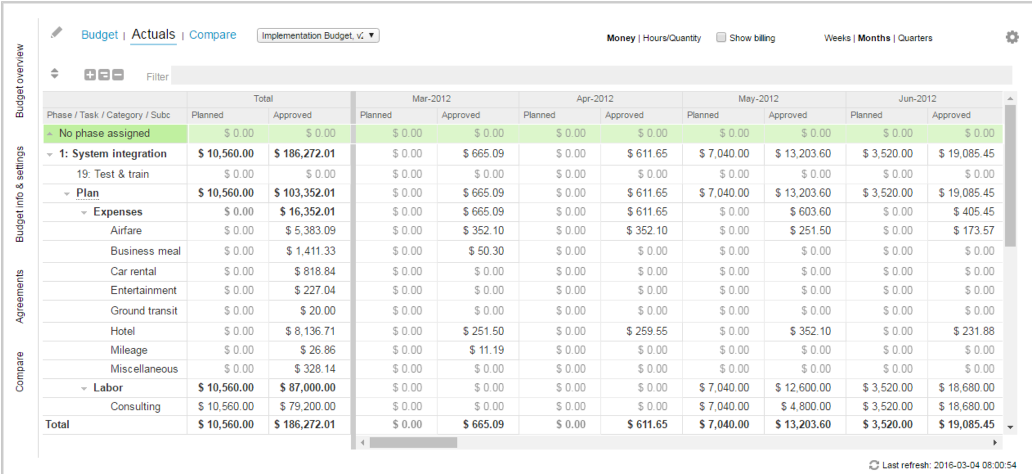


- Click **Add** under the expenses, labor or purchases category to add a budget item. A form appears and lets you enter information for each budget item, including the periodicity for repeat costs.

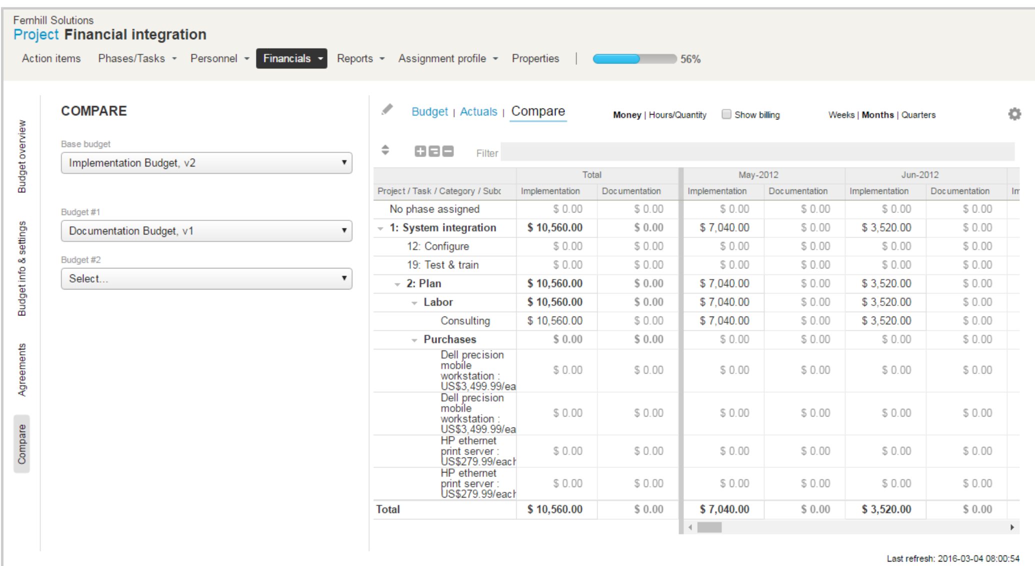


- Click **Quick Add** under the expenses, labor or purchases category and select a cost item subcategory to add a cost row on the project grid. You can then add cost information directly in the grid using inline-editing.
- Click **Import** to import labor cost items from task assignments or bookings.
- Click the delete icon to delete the budget item.
- Click the edit icon to edit budget item information.
- Point to the tooltip icon to view a tooltip with information about the imported budget item.
- Double click a cell on a budget item row in the time grid to enter the budgeted cost, quantity, or number of hours for that budget item in that week. The schedule for each task and phase is indicated on the task or phase row by cells with a blue color background (task) or gray color background (phase).

- Actuals View — Click **Actuals** in the toolbar to compare incurred project costs against the planned budget (for cost-based budgets), or actual values from charges and invoices against the planned budget (for billing-based budgets). The summary grid and time grid include columns showing planned and actual values. Actual values are either Approved, Approved excluding taxes, Open, or All.



- Compare View — Click **Compare** in the toolbar to compare up to 5 budgets on the same page. Click the Compare vertical tab in the Information and Settings panel, then select a base budget and the budgets you want to compare. To remove a budget from the compare view select **Select ...** from the corresponding dropdown field.

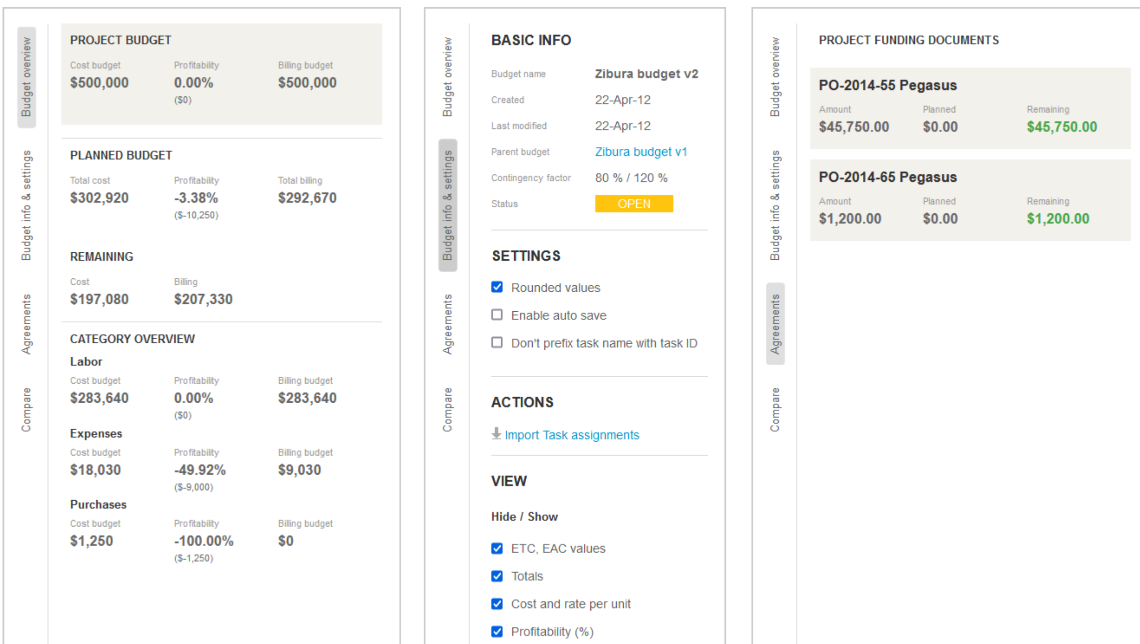


Information and Settings Panel

- The **Budget overview** tab lets you view the budget totals and remaining funds.
- The **Budget info & settings** tab lets you:
  - View basic budget information, including the budget name, created and modified dates, the parent budget it was created from, and its status.
  - Control view settings.
    - Check the **Rounded values** box to show monetary values rounded to the nearest integer value.
    - Check the **Enable autosave** box to save changes to your budget automatically on a regular basis (Budget view online).
    - Check the **Don't prefix task name with task ID** box to show task names only in the project budget grid and remove the task IDs.

- Check or clear a box under the View section to show or hide the corresponding project budget grid columns. On the Actuals view you can also:
  - Select to show actual costs at the task level or cumulatively at the phase or project level.
  - Select which loaded cost to show.
  - Choose which budget scenario (normal, pessimistic, optimistic, most likely) to compare actual project costs against.
- Perform certain actions, such as importing labor item information from task assignments or bookings.

- The **Agreements** tab lists the agreements and Customer POs associated with the project. The list shows summary information for each funding document, including the document name, total amount, total planned costs, and remaining funds. Billing budget entries are deducted from agreements and customer POs in chronological order.
- The **Compare** tab lets you select a base budget and other budgets you want to compare. To remove a budget from the compare view select **Select ...** from the corresponding dropdown field. You can compare up to 5 budgets at the same time.



Project Budget Toolbar

The toolbar includes the following controls from left to right:

- Edit icon — Click the icon to edit the budget properties.
- Budget | Actuals | Compare — Choose **Budget** to show budgeted costs. Choose **Actuals** to show actual incurred costs. Choose **Compare** to show multiple budgets side by side on the same view.
- Budget dropdown — A dropdown field lets you select the budget you would like to view for the currently selected project.

- Money |Hours/Quantity — Choose **Money** to show only monetary values in the time grid. Choose **Hours/Quantity** to show time in hours and quantities instead of monetary values where relevant.
- Show billing — Check the **Show billing** box to view billing-based budget figures in the time grid. When checked, the values in the time grid. Clear **Show billing** to view the cost-based budget.
- Weeks | Months | Quarters — Choose the granularity for the time grid to show a detailed breakdown of your budget per week, month or quarter.
- Settings icon — Click the icon to show a menu with additional options. You can download the project budget grid data as a CSV, HTML, or PDF file, enable column resize, or reset columns to their default width.
- Click the Expand All icon or Collapse All icon to expand or collapse all nodes in the project budget. Click the Expand Work Breakdown Structure icon to expand all phase and task nodes but not the category and subcategory nodes.
- Filter — Enter the name of a cost category to show only matching cost items in the project budget grid.

Sorting Options

You can sort the project budget data by column using the sort icons in the summary grid and time grid column headers.

This feature supports ascending and descending sort orders and multi-level sorting up to three levels. The arrows in the column header indicate the sort order and sorting levels:

- Sorting levels are color-coded:
  - White color arrow — Primary level
  - Yellow color arrow — Secondary level
  - Green color arrow— Tertiary level
- The colored arrow indicates the sort order for each sorting level:
  - Arrow pointing up — Ascending sort order
  - Arrow pointing down — Descending sort order

Click a column header to select that column as your primary sort field. Click the same column header again to change the sort order. If you click a different column header, this column becomes your primary sorting level, the previous primary level becomes the new secondary level and the previous secondary becomes the new tertiary level.

To reset the sort order to the default one, click the sort icon in the toolbar.

Creating a Project Budget or Modifying Project Budget Properties

You can create any number of budgets for your project using the Project Budget feature. You can also edit the properties of existing project budgets that are not submitted for approval or approved.

To create a Project Budget or modifying project budget properties

1. Go to Projects > Projects > [*Select a project*].
2. Do one of the following:

- To create a new project budget, click the Create button, then **Project budget**.
- To modify the properties of an existing project budget, click Financials > Project budget in the project record header, and click the Edit icon under the Action column for the budget you want to modify.

The project budget properties form appears.

3. Enter all required information on the project budget properties form. The form includes the following information:
   - **Project budget name**
   - **Date**
   - **Budget level** — Choose whether to budget at the project, phase, or task level. The budget level cannot be changed for existing budgets.
   - Check **Enable creation of project budget entries not connected to particular tasks** box, if applicable. This lets you add budget entries at the project level when **Budget level** is task, for example.
   - **Planned budget** — Define the cost (for cost budgets) or cost and profitability (%) (for billing budgets).
     - **Cost** — Total project cost (used for all budgets, whether based on cost or profitability).
     - **Profitability (%)** — The target profitability percentage (used for budgets based on billing).
     - **Billing** — Read-only value used for budgets based on billing, and calculated automatically based on:
       - The sum of all agreements and customer purchase orders attached to the project, if the **Get planned billings from Agreements and Customer POs attached to the project** box is checked.

         > **Note:** If the **Get planned billings from Agreements and Customer POs attached to the project** box is checked, changing either one of the **Cost** or **Profitability (%)** value, changes the value of the other based on the **Billing** value.

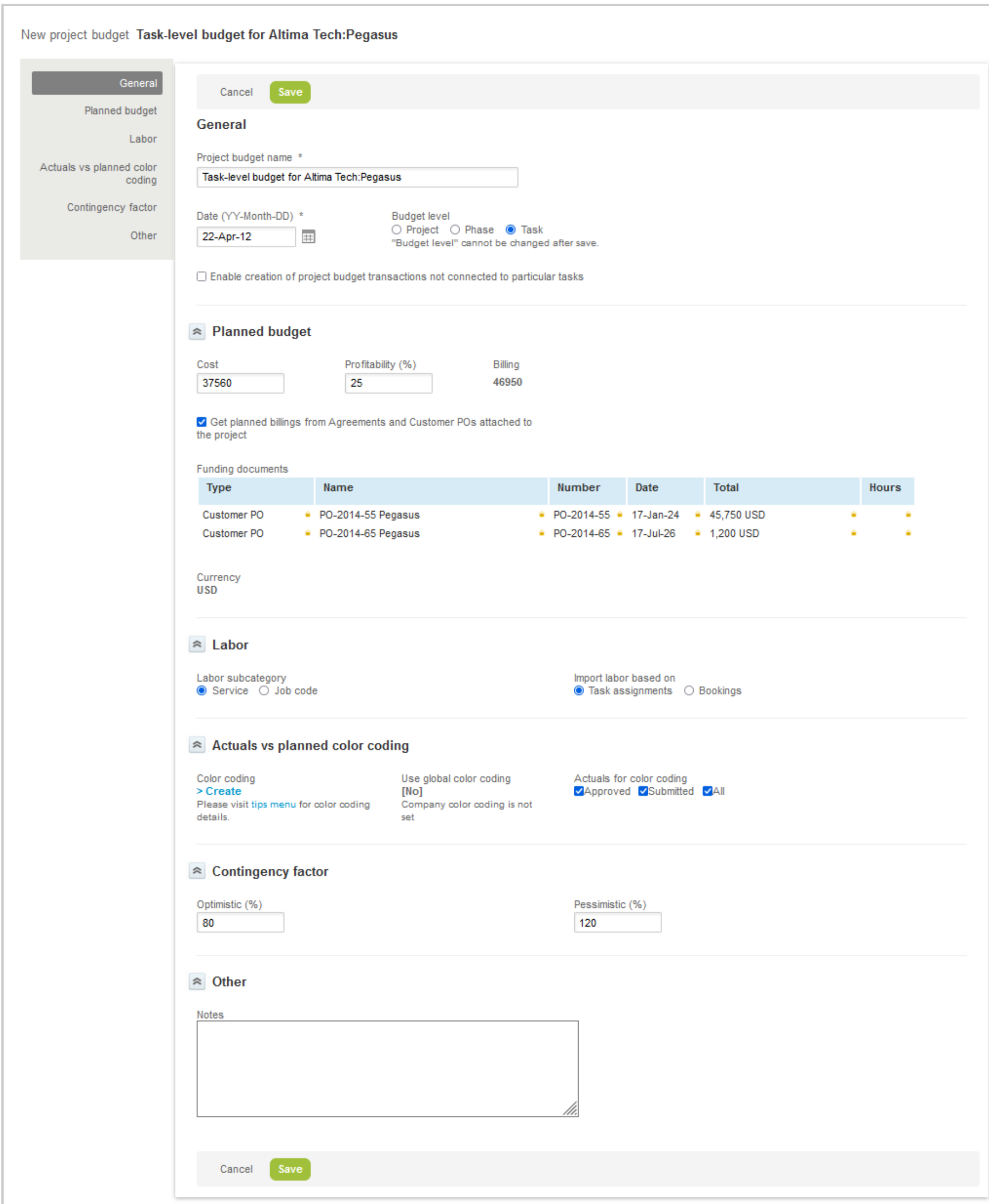
       - The **Cost** and **Profitability (%)** values, otherwise.
     - **Funding** — If the **Get planned billings from Agreements and Customer POs attached to the project** box is checked, the form shows the list of agreements and customer POs associated with the project including the following information: Document type, name, number, date, monetary **total**, total number of **hours**.
     - **Currency** — The currency set on the project properties form.
   - **Labor** — Set the labor subcategory and imported labor information settings
     - **Labor subcategory** — Budget entries for labor can be broken down either by Service or by Job code.
     - **Import labor based on** — Budget entries for labor can be imported from either task assignments or bookings.
   - **Actuals vs planned color coding** — Add color coding for budget actuals in the Compare view to identify budget entries that are on or off target.
     - **Color coding** — Click **Create** to set ranges for color coding in the Compare view, based on the percentage of actual values compared to planned values.
     - **Use global color coding** — Check this box to use the color coding preferences set for your account.
     - **Actuals for color coding** — Select which actual values that will be color coded, based on item statuses (Approved, Submitted, or All).

- **Contingency factor** — Set **Optimistic (%)** and **Pessimistic (%)** scenarios for your project. Default values are 80% and 120%, respectively, and can be changed in Administration > Application Settings > Projects > Project Budget Options.

  > **Note:** The Contingency factor form section shows only if your account is configured to allow for a simplified contingency factor on project budgets. To change this configuration setting, contact OpenAir Customer Support.

- **Notes**

4. Click **Save**.



 OpenAir

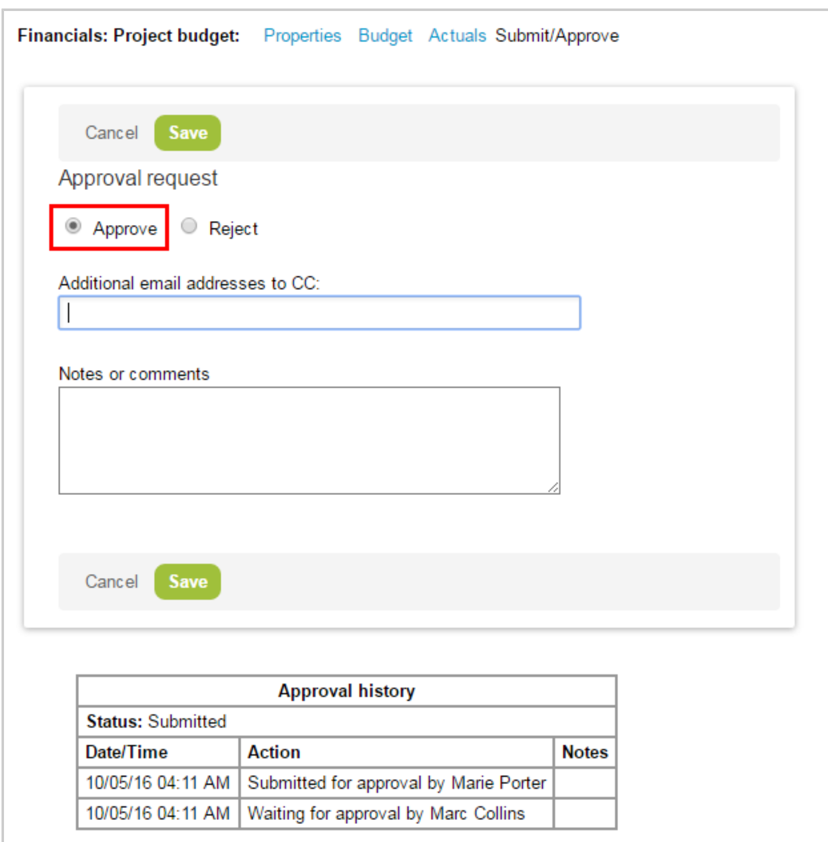
Approving and Unapproving a Budget

You can view all budget versions for approval, automatically reject submitted budgets and archive old approved budgets in the budget interface. To view the list of budgets, go to Projects > Project budgets and select a budget status (Open, Submitted, Approved, Rejected, Archived, or All).

Different versions of the same budget are assigned a version number which is visible in the Version column of the Project budgets lists. Approved budgets automatically cause other submitted budgets to be rejected. Previously approved budgets are archived, so only one approved budget exists at any particular time.

To approve a submitted budget:

1. Go to Projects > Project budgets and select the Submitted budget list. You can also choose to show budgets which are “Waiting my approval” or “All”.
2. Click the budget to approve. The budget properties form opens.
3. Click **Submit/Approve**.
4. On the Approval request form, choose **Approve**.
5. (Optional)Enter **Additional email addresses to CC** and add **notes or comments** for the approval.
6. Click **Save**.



Administrators can give selected users the permission to unapprove budgets. To enable this feature for a user, go to Administration > Global Settings > Users > Employees > [Select a user ID], scroll to Projects Options, check the **Allow the employee to unapprove a project budget box**, and click **Save**.

To unapprove a budget:

1. Go to Projects > Projects > [*Select a project*] > Project budgets and select an approved project budget.
2. Click **Submit/Approve**.
3. In the Approval History screen, click the **Click here** link in the unapprove message to unapprove the budget.

Approval history		
Status: Approved		
Date/Time	**Action**	**Notes**
09/14/16 05:14 AM	Submitted for approval by Marc Collins	
09/14/16 05:14 AM	Approved by Marc Collins	Automatic approval: The approver is the same employee as the submitter
You can un-approve this project budget. Click here to continue.		

Account-Wide Project Budget Preferences

You can set account-wide preferences for the Project Budget feature, including color coding for budget variances.

To set account-wide preferences for the Project Budget feature, go to Administration > Application Settings > Projects > Project Budget Options.

The form lets you set the following preferences:

- Number of week, month or quarter period visible before the start date and after the end date of the project.
- Data distribution — Choose to apply the cost on the first day of the period or to distribute evenly across the whole week, month or quarter period.
- Import cost priority — Choose to use employees cost only, service or job code cost only, or both with a preference for employees cost.
- Color coding — Set color coding to identify incurred costs that are on- or off-target, based on the percentage of planned versus actual expenditure. Click **Create**, then enter **Low** and **High** percentage values and select a color for each color coding category.

  Budget color-coding accurately reflects overages when using optimistic or pessimistic contingencies. After you have set color-coding ranges for a budget, when you switch between Normal, Pessimistic, or Optimistic planned values in Actuals view, the color-coding automatically takes into account the new planned values when shading actual budget values.

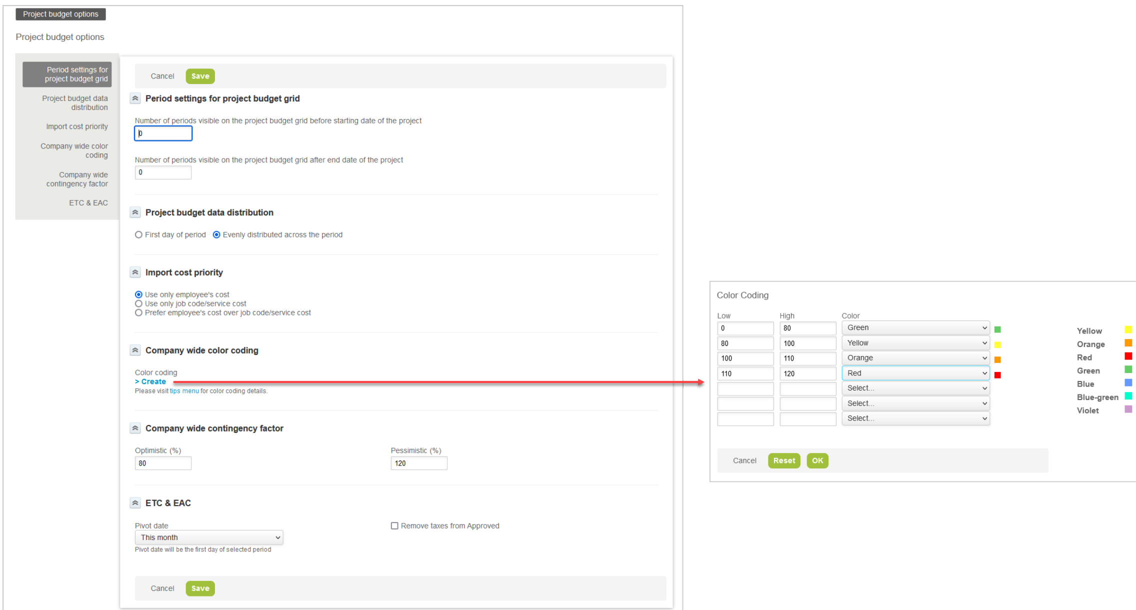
  > **Note:** To set a maximum percentage (essentially “infinity”) enter 999 into a High field.

- Contingency factor — Set default values for **Optimistic (%)** and **Pessimistic (%)** scenarios for project across the account.

  > **Note:** The Contingency factor form section shows only if your account is configured to allow for a simplified contingency factor on project budgets. To change this configuration setting, contact OpenAir Customer Support.

- ETC & EAC — If the Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets optional feature is enabled for your account, you can set the **Pivot date** used to calculate the ETC and EAC values:

- The Estimate to Complete (ETC) is used for forecasting the funding needed to finish the project at any point. The calculated value includes all planned budget values from the pivot date until the last project budget entry.
- The Estimate at Completion (EAC) is used for forecasting the overall cost of the project. The calculated value includes all actual budget values before the pivot date and Estimate to Complete values from the pivot date until the last project budget entry.



Project Center Options

If the Project Center feature is enabled for your account, users with the “View Project Center” role permission can access the project center view when they go to a project record. For more information about the Project Center feature, see the help topic Working with the Project Center View.

By default, the project center view shows a project outline on the left with the project sequence and resources booked to the project, and a booking grid on the right which can be used to view, add and modify hours each resource is booked to a project task at any point in the project time span.

If your company uses the project center only to create and manage project sequences but not to staff project and manage resource bookings, you can hide the resource booking information for all users. To do so, check the **Disable project center booking worksheet** box.

Resource availability indicators in the booking grid show the availability of the resource for each week as you add bookings or make changes to existing bookings for this resource. The availability indicator shows the number of hours available for booking based on the total number of hours across existing bookings for this resource that week, and the total number hours the resource is working that week (according to the employee work schedule). If the Overbooked resources warning indicators are enabled in the project center display options, the availability indicator always shows for a given resource in a given week when booked hours reach a utilization threshold.

Account administrators can configure which bookings are excluded from the available hours and booked hours calculation based on the **Booking type** and **Approval status**. They can also customize the resource availability indicator in the Project Center view, and set resource utilization ranges and color coding to suit the business requirements of your company.

To do so, go to Administration > Application Settings > Projects > Project Center Options.

Under the Resource availability calculation section of the form:

- Select the **Booking types excluded from resource availability calculation on the Project Center page** — All booking types are included by default.
- Select the **Booking approval statuses excluded from resource availability calculation on the Project Center page** — All approval statuses except “Rejected” are included by default. Rejected bookings cannot be included in the available hours calculation.

Under the Utilization color coding section of the form:

- Enter the utilization threshold for the **Overbooked warning indicator (%)**. The utilization threshold is given as a percentage of working hours in a given week. The value must be between 0 and 999.

  The booking grid cell shows a warning indicator if the total number of hours the resource is booked for is greater than or equal to the specified percentage of working hours.

  > **Note:** In this context, utilization is understood as the percentage of working hours the resource is currently booked for across all projects in a given week.

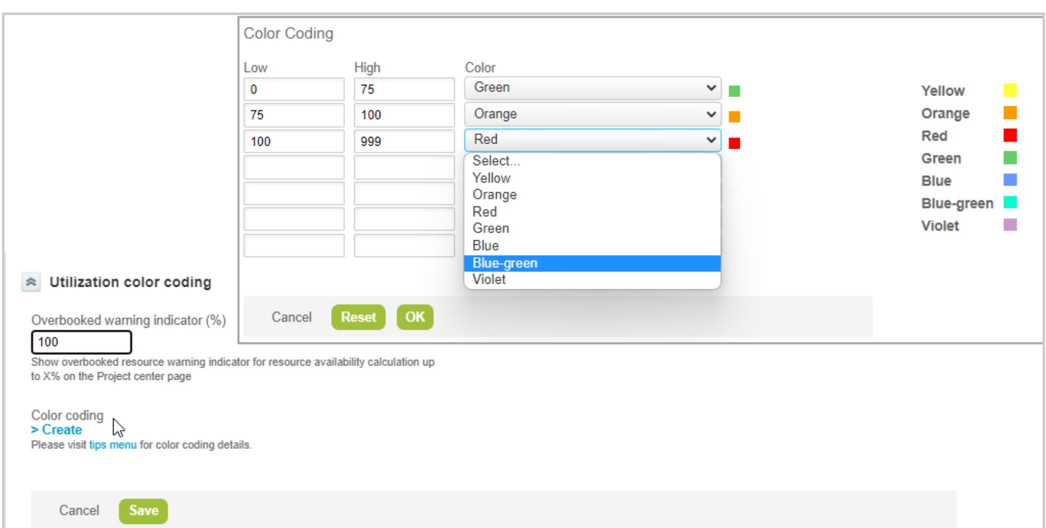
- Click **> Create** or **>Edit** under **Color coding** to create or modify a custom color code for the availability indicators.

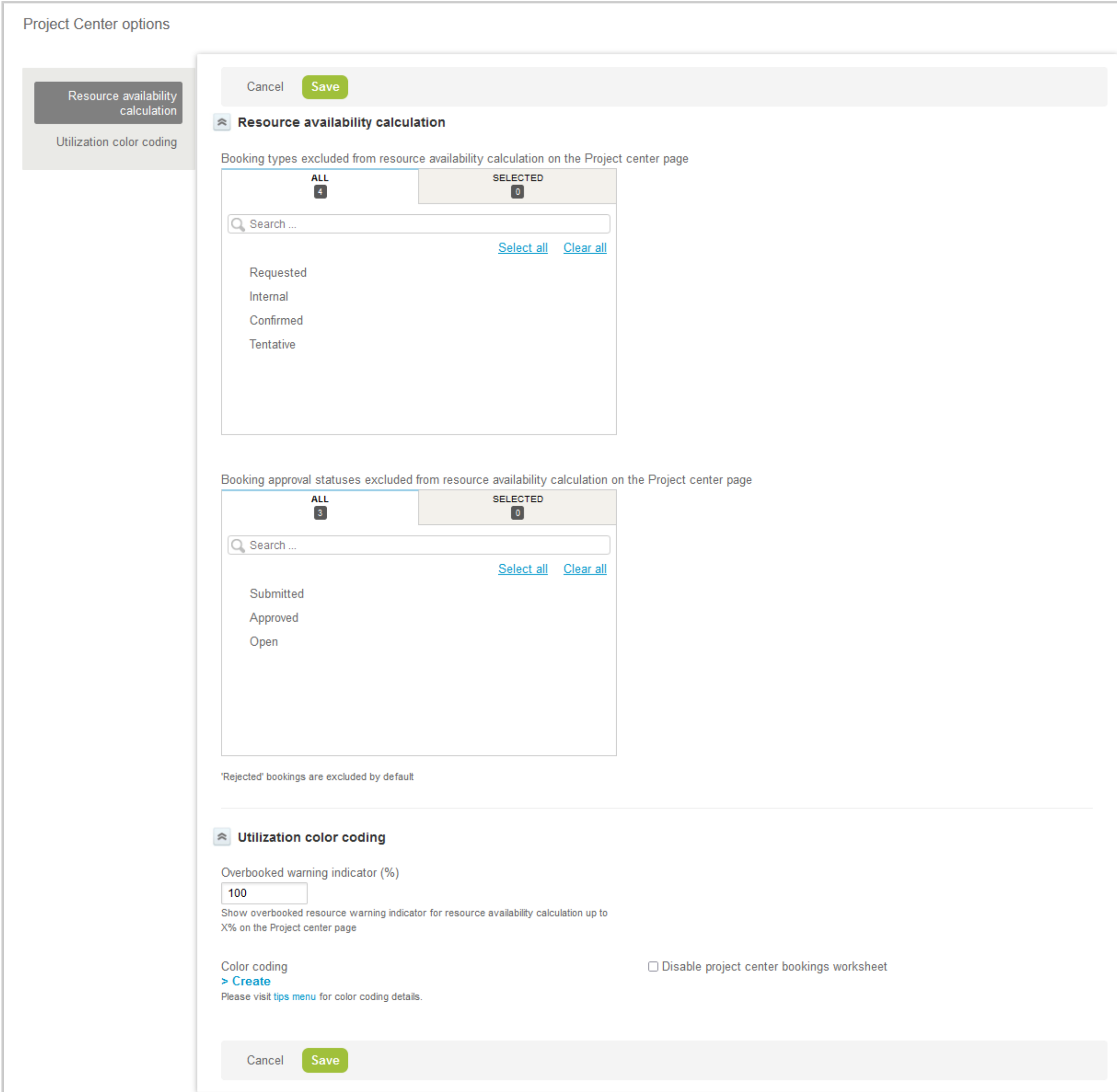
  The Color coding grid appears and lets you define up to 7 utilization ranges (one per row) and their corresponding colors to suit your business requirements.

  For each utilization range:

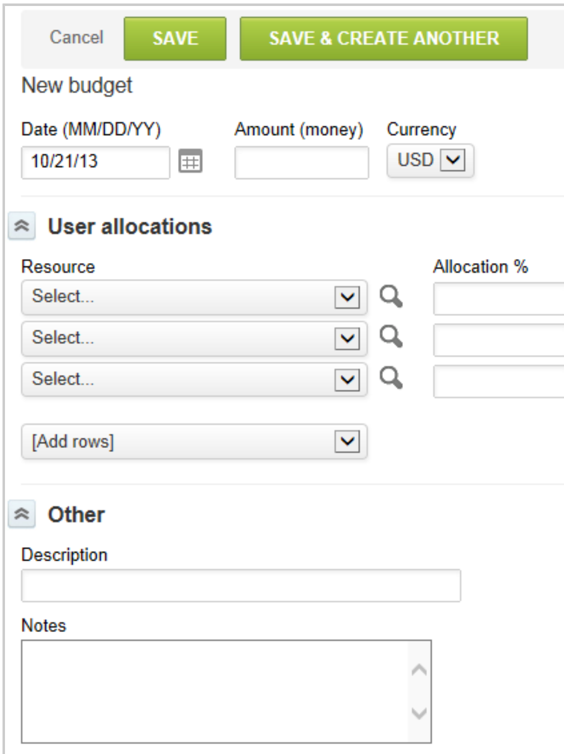
  - Enter the lower limit for the utilization range under **Low**.
  - Enter the upper limit for the utilization range under **High**.
  - Select the **Color** to be used for the availability indicator progress bar.

  > **Note:** Non-utilized working hours (the left portion of the progress bar if the utilization is under 100%) always shows in gray color. If there are no bookings for the resource or if the utilization is not within a defined range, the entire bar shows in gray color. This gray color is not customizable.




Project Center options
Resource availability calculation
Utilization color coding
Cancel
Save
Resource availability calculation
Booking types excluded from resource availability calculation on the Project center page
ALL
4
SELECTED
0
Search ...
Select all
Clear all
Requested
Internal
Confirmed
Tentative
Booking approval statuses excluded from resource availability calculation on the Project center page
ALL
3
SELECTED
0
Search ...
Select all
Clear all
Submitted
Approved
Open
'Rejected' bookings are excluded by default
Utilization color coding
Overbooked warning indicator (%)
100
Show overbooked resource warning indicator for resource availability calculation up to X% on the Project center page
Color coding
> Create
Please visit tips menu for color coding details.
Disable project center bookings worksheet
Cancel
Save

Transactional Budget



The Budget option lets you track project funding over time. Many projects require change orders or extensions to the existing project budget funding. When the budget functionality has been enabled in your OpenAir environment, you are able to identify individual funding items that make up the total project budget, such as statements of work (SOW) or purchase orders (PO).

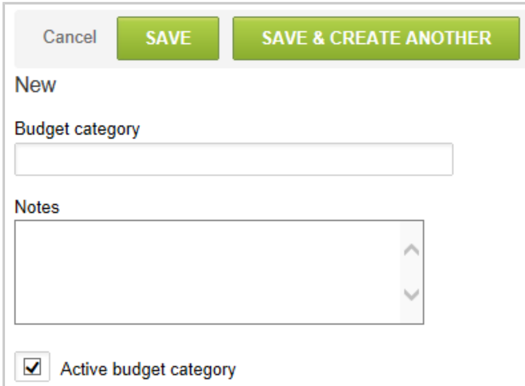
You must contact OpenAir Customer Support and request that the Budget feature be enabled. It is activated by an internal switch. When using the budget feature, you are not be able to enter a budget amount directly on the Edit project form. Instead, that files is read-only and contains the value and sum total of the budget line items. You enter the funding amounts using the Budget link for the appropriate project.

To create a new budget:

1. Go to Projects > Projects.
2. Select the project.
3. Select **Budget** from the **Create Button**.

There are two data elements that can be defined within the budget option: Budget Category and Budget Activity. These are described as follows.

Budget Category

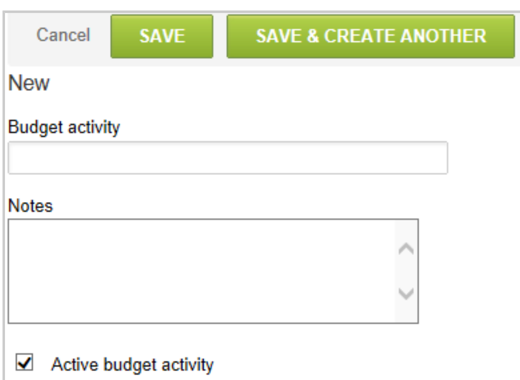


With Budget Category, you can specify what types of documents the funding is coming from such as a SOW, PO, or master agreement. Another common definition of categories is the type of funding such as Fees, Expenses, and Maintenance. Enter a name for the category and any notes, if needed. The Budget category field on the Budget form displays a drop-down list of categories.

To create a Budget Category:

1. Go to Administration > Application Settings > Projects > Budget categories.
2. Select **New Budget category** from the **Create Button**.
3. Enter a name for the category and any notes. The budget category drop-down list displays on the Edit the budget form.

Budget Activity

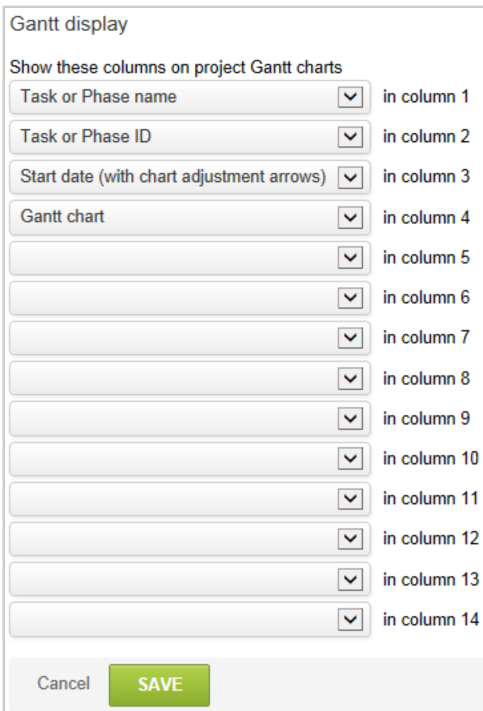


Budget Activities are a way to identify various activities that are involved in obtaining the project funding. Examples include Initial Estimate, Proposal Provided, and Signed Contract. Individuals responsible for the activities can be defined on the Budget form along with the activity and the % allocation of funding to the type of activity completed. Allocation usage is typically for identification of commission payouts according to the compensation policy of your company. You are able to create as many activities as necessary.

To create a Budget activity:

1. Go to Administration > Application Settings > Projects > Budget activities.
2. Select **New Budget activity** from the **Create Button**.
3. Enter a name for the activity and any notes, if needed. The budget activity drop-down list displays in the Edit the budget form.

Gantt Display (without Outline, Gantt, and Task Views enabled)

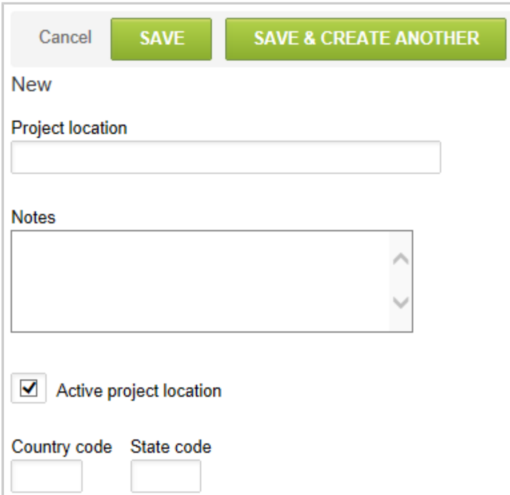


The Project Gantt View displays as a link within a project if phases/tasks are enabled within the project stage. See Project Stages. The layout form lets you select the fields you want to display and the order of those fields. This is a global setting that applies to all Gantt views for projects.

To access and modify the Gantt display:

1. Go to Administration > Application Settings > Projects > Gantt display.

Project Locations



Project Locations store location information within the project entity. This information is not used as part of any other functionality in OpenAir but can be used for reporting purposes. It enables you to categorize your projects according to their location, if needed. Examples of project locations are state, city, country or any custom list of values.

To create a Project location:

1. Go to Administration > Application Settings > Projects > Project locations.
2. Select **New Project location** from the **Create Button**.
3. Enter the Project Location name and any Notes about the location.
4. Select the check box for Active project location.
5. Type a Country code and State code as applicable.
6. Click Save.

Project Stages

Project stages classify projects based on your business requirements. See Creating a Project Stage.

After you create project stages, you can assign individual projects to the appropriate stage. See Changing the Project Stage for a Project.

You can create Proposed, Active, Closed, Lost, and Internal stages to classify projects, for example, where:

- Proposed projects are projects which have not yet started and for which there are no signed contracts.
- Active projects are projects for which you have signed paperwork and which are being worked by your resources.
- Internal projects usually represents projects for which you want to track time and expenses, but are not customer related, such as training and documentation.

Project stages display as subtabs on the projects list view. The **All** subtab lists projects in all project stages the user has access to. You can control the order in which the subtabs appear. See Reordering Project Stage Subtabs on the Projects List View.

Creating a Project Stage

You can create project stages to classify projects based on your business requirements.

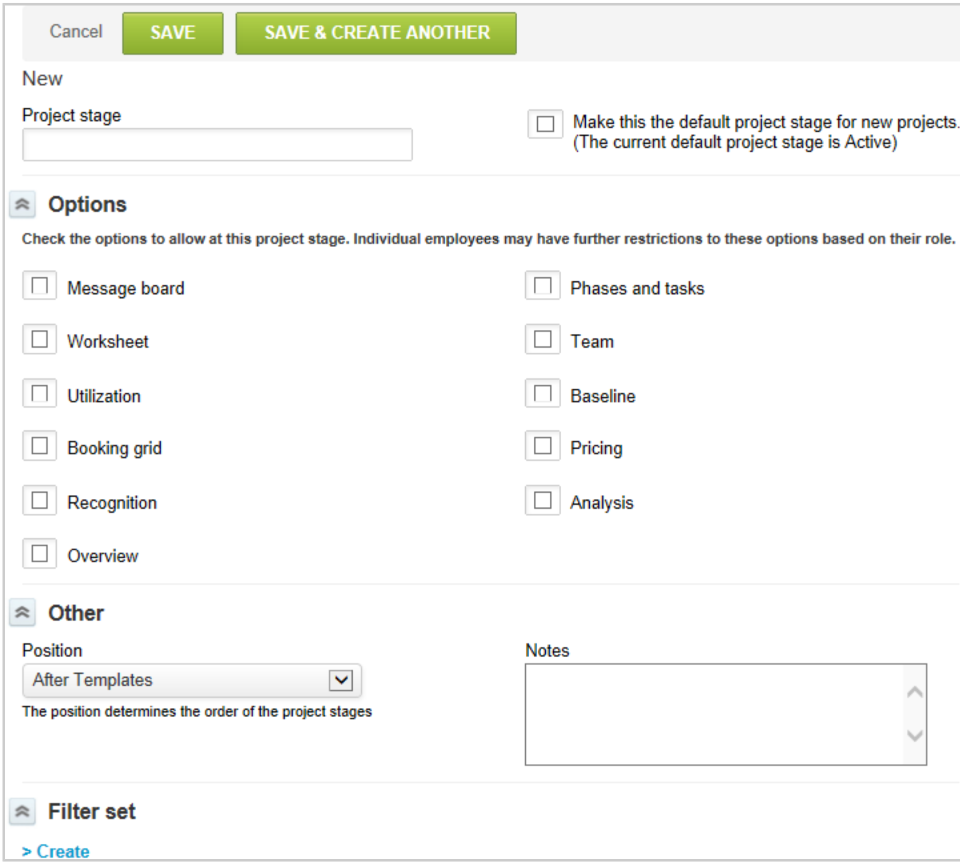
> **Note:** When creating a project stage, you can enable access to the project record functionality that is required at this particular stage. For example, you may want to have Billing and Recognition options available for projects in the Active stage, but not for projects in the Internal stage. Options include:
>
> - **Dashboard —** enables a project-specific message area and 1-click report location
> - **Phases and Tasks —** exposes links related to task management
> - **Worksheet —** provides ability to make updates across multiple tasks
> - **Team —** displays all employees either booked or assigned to the project along with their booked or assigned dates
> - **Issues —** enables issue tracking within the project
> - **Budget —** provides ability to enter funding budgets including change orders or types of budget values
> - **Utilization —** enables a graphical view of booked and assigned employee utilization for the project
> - **Baseline —** provides for the storage of project snapshot baselines for variance reporting
> - **Booking grid —** displays booking worksheet for entry of resource booking directly from the project
> - **Pricing —** enables the estimation feature for displaying gross/net revenue and estimated margins
> - **Billing —** provides ability to create and run billing rules for generating invoice charges and billing forecasts
> - **Recognition —** provides ability to create and run recognition rules for generating revenue transactions and forecasting revenue
> - **Analysis —** permits high level financial analysis of all costs and income
> - **Overview —** displays a standard OpenAir status report for the project

To create a Project Stage:

1. Go to Administration > Application Settings > Projects > Project stages.

2. Click the Create button then **New project stage**.

   The new project stage form appears.



3. Enter a name for the **Project stage**.
4. Check the **Make this the default project stage for new projects** box, if applicable. Only one project stage can be the default project stage. Checking this box will override any previous default project stage.
5. Under **Options**, check the boxes corresponding to the functionality and subtabs you want to make available on the project record when the project is in this project stage. A functionality or subtab will not be available to any users unless the corresponding box is checked.
6. Select the relative **Position** for the subtab corresponding to this stage. See also Reordering Project Stage Subtabs on the Projects List View.
7. Enter any **Notes** as required.
8. If standard email notifications controlled at the project stage level are enabled for your account, under **Notifications** check the boxes to control which events trigger notification email to be sent automatically and create a list of **Employees to notify**.
9. You can use filter sets to control access to projects at this stage. To do so, do the following:
   a. Under the Filter sets form section, click **Create**.
   b. Select the filter sets as appropriate. Employees who have this filter set as their active filter set cannot access projects in this stage.
   c. Click **OK**.

> **Note:** Project stages are one of the attributes you can use to control access using filter sets. Filter sets define what data the employee has permission to view or update. Depending on the filter set assigned to an employee, including any filter set applied when the employee views a particular OpenAir module, the employee may not access all the project stages and all the projects at these stages. For more information about filter sets, see Filter Sets Overview
>
> When you select filter sets on the project stage form, the selected filter sets do not allow the employee to view or modify information associated to projects in this project stage. For example, you should use filter sets to control who can access project records that are in a closed, cancelled or archived stage, both for performance reasons and to prevent employees from modifying these projects.

10. Click **Save**.

Changing the Project Stage for a Project

After you create a project stage, employees with the appropriate permissions and access privileges can progress a project to this project stage.

To change the project stage of a project:

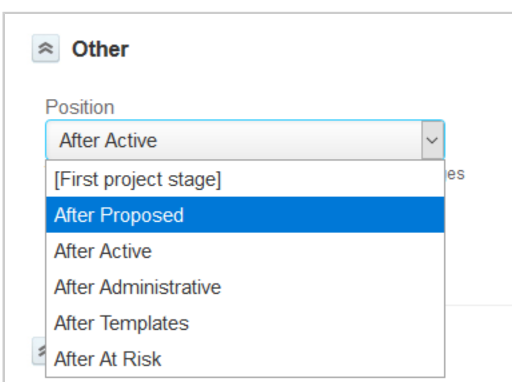
1. Go to Projects > Projects > [*Select a project*] > Properties.
2. Select a **Project stage** from the dropdown list.
3. Click **Save**.

Reordering Project Stage Subtabs on the Projects List View

Project stages display as subtabs on the projects list view. You can change the order in which subtabs appear on the projects list view at any time.

To reorder project stage subtabs on the projects list view:

1. Go to Administration > Application Settings > Projects > Project stages.
2. For each project stage, to move the corresponding subtab relative to others, do the following:
   a. Select the project stage.
   b. Select the relative **Position** for the subtab corresponding to this stage.The relative position can be set to first project stage or after any other existing project stage.



c. Click **Save**.

Project Stage Use Case: Project Templates

Templates are predefined project structures that you can use to simplify project creation. Employees can copy a template when creating a project to have project information and associated records prepopulated. You can create a **Templates** project stage to classify all project templates used in your company.

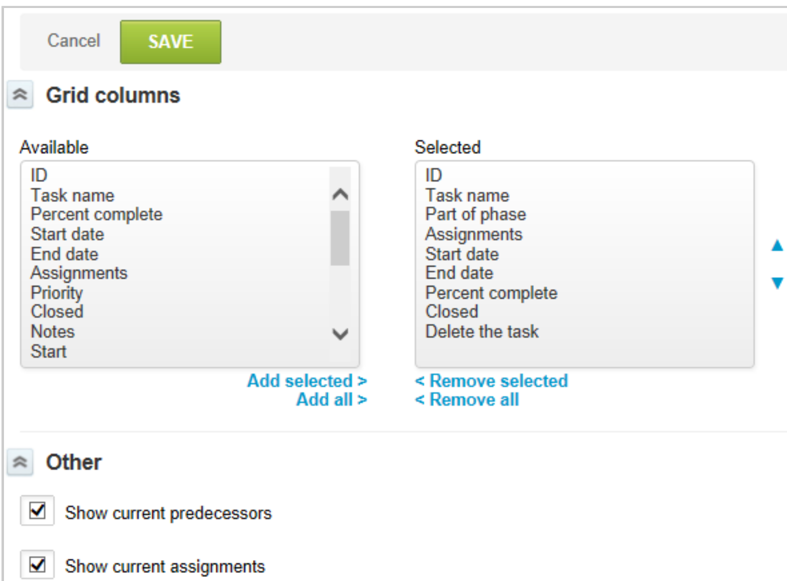
To create a new project from a template:

1. Go to Projects.
2. Click the Create button then **New, from another project**.
3. Under **Duplicate phases and tasks from this project**, select the project template from the dropdown list.
4. Check the boxes for the elements of the project template you want to copy to the new project.
5. Enter any additional information as required.
6. Click **Save**.

Note: By default, all projects are available for copying. To limit the number of projects that can be duplicated, create a custom checkbox field and associate it with Projects. The field name must be `duplicate_from_project`. You can use `Use as project template` as display name. After you create the custom field, check the box on the properties form for each project which can be used as the base for duplicate project. Then, only those projects with this check box selected are available to be duplicated. See Custom Fields and specifically the Checkbox custom field.

Tip: To create a new project from an existing project, you can also go to the properties form of the project you want to copy and click the Tips button then **Clone this project**. Account administrators can control who can clone a project if the Clone Project Role Permission optional feature is enabled for your account.

Worksheet Display



The Worksheet link displays within a project if phases/tasks are enabled in the project stage. See Project Stages. The layout form lets you select the fields you want to display/modify and the order of those fields. This is a global setting that applies to all task worksheets within projects. The ability to modify specific fields within the worksheet display is controlled by edit permissions of the form or employee role.

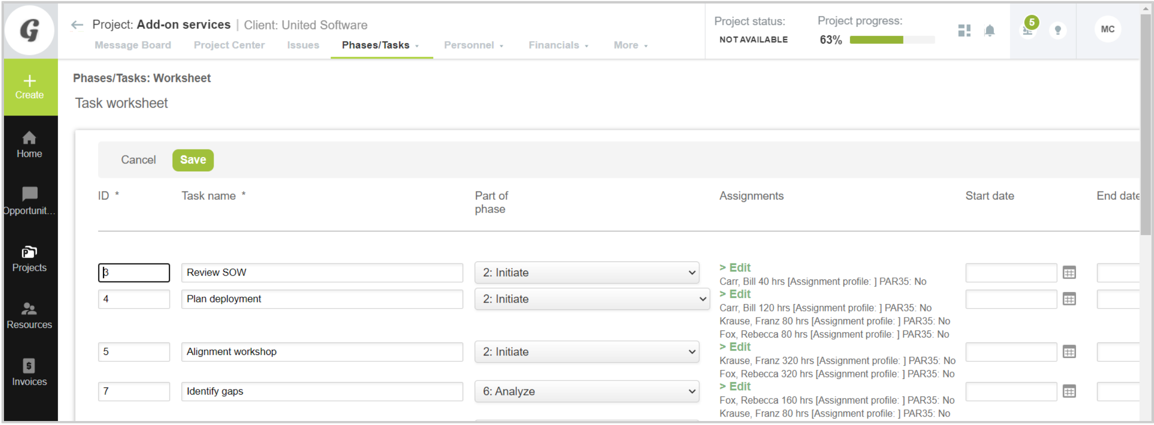
To access and modify the Worksheet Display:

1. Go to Administration > Application Settings > Projects > Worksheet display.

Note: When including assignments and predecessors in the task worksheet, you may display the current value of those fields as text below the create/edit options by selecting the desired option.

Worksheet Display Pagination

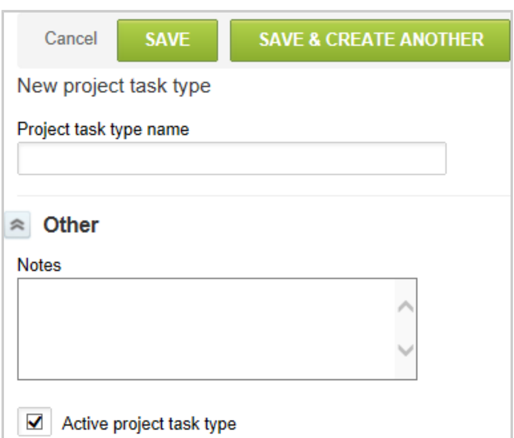
The task worksheet can be separated into pages to increase performance and make large amounts of information more manageable.



To set the number of tasks which appear in a Task Worksheet page:

1. Go to Administration > Application Settings > Projects > Worksheet Display.
2. In the “Number of paginated rows to display” field, enter the number of tasks you want to show on each page. Clear the field to disable this feature.
3. Select “Enable sorting on columns ID and Task name” to allow users to sort these columns alphanumerically in ascending or descending order.
4. Click **Save**.

Task Types



Project task types are useful in task assignments, time entries, receipts, and charges. They are very important in the calculation of utilization and also help filter hour-related data in reports. When time is recorded against tasks with a defined task type, the task type is stored with the time entry record. You can display and filter the task and task assignment detail reports by project task type. You can also sub-total and filter Summary Reports and Advanced Resources reports by task type. The task type provides the ability to label individual tasks on a project. You can create as many types as you need to accommodate your company's specific time tracking requirements.

Utilization reports may use the value on the stored time entry or the current value on the task. See Reporting Options. All other time based reports rely on the task type stored on the time entry record.

Some examples of typical task types include: Billable, Non-Billable, and Administration. Before you can use task types, you need to configure them in your account.

Important: Task types should be set to the correct value before time entries are stored on approved timesheets. Changes to task types throughout a project lifecycle may introduce conflicts in data reporting of what is stored on the time entry record versus what is set on the task type.

To create a Task type:

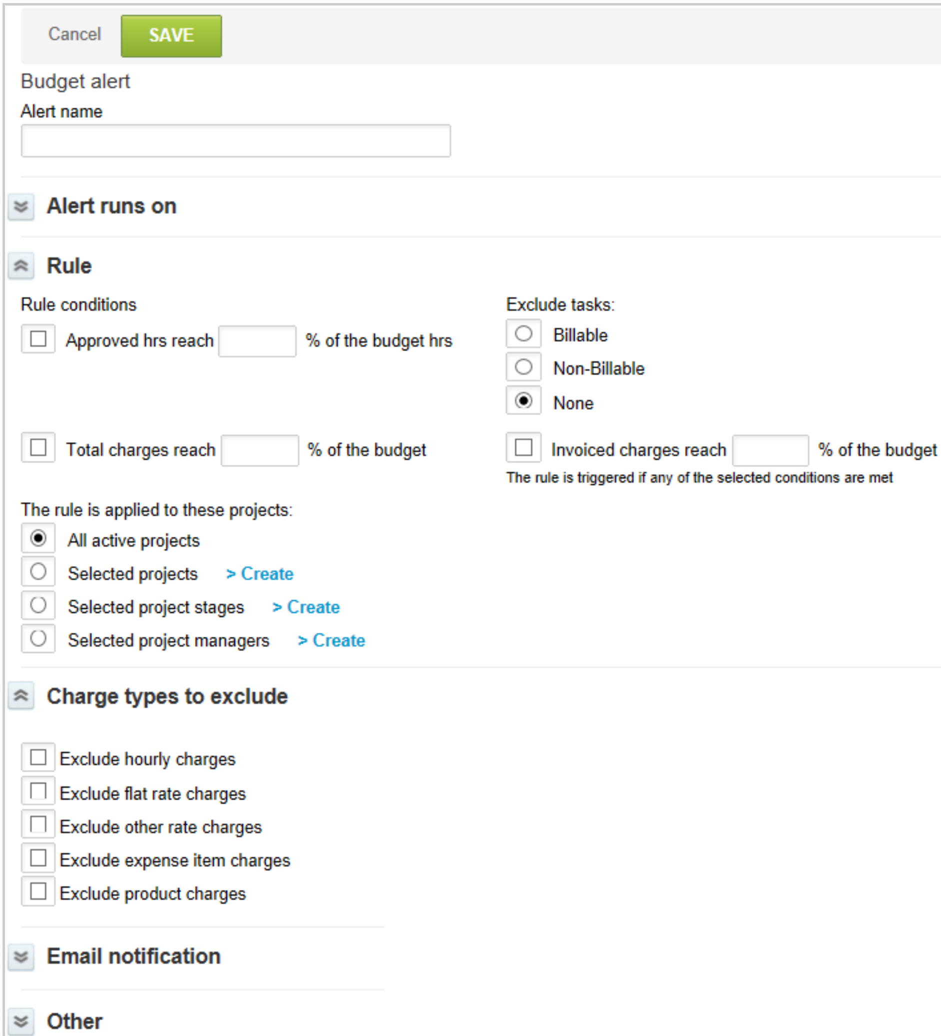
1. Go to Administration > Application Settings > Projects > Task types.
2. Select **New Task type** from the **Create Button**.
3. Enter the Task type name and any notes, if desired.
4. Click Save.

Note: The value of the task type does not control whether the task is available for project time billing transactions to customers. This is managed by the Non-billable task check box located near the bottom of the Properties form. As an account administrator, it may be helpful to run a detailed task report comparing the non-billable check box value with the task type to verify the proper alignment.

To use task types:

1. Go to Projects > Projects and select a project. Select a view under Phases/Tasks. Click on a task. On the New and Edit task forms, there is a drop-down list of Project task types.

Alerts



You can configure Budget Alerts in OpenAir. Frequently, a 90% of Budget Alert is configured to run every day and sends an alert when approved hours read 90% of budget hours. This alert applies to all active projects and an email is usually sent to the project owner.

Alerts allow automated email reminders to be sent to ensure business needs are met. In the Projects application, a form is provided to help you create a new budget alert.

To create a Budget alert:

1. Go to Administration > Application Settings > Projects > Alerts.
2. Select **New Budget alert** from the **Create Button**.
3. Name the alert.
4. Under Alert runs on, select the day and time when the Alert should run.
5. Under Rule, define the appropriate selection rules for why an alert is sent.
6. Under Charge types to exclude, select charge types.

7. Use the Email notification section to define who receives the email, the email sender, subject and text, and additional text.

> **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`. See also Email Settings.

8. Add notes, as desired. These notes do not appear anywhere in the alert. They are for informational purposes, such as remembering why the alert was created.
9. Check the Active alert box to make this alert active.
10. Click Save.

Assignment Groups

An assignment group is a list of employees that are available from all the active employees in OpenAir. Assignment groups allow you to assign several employees to projects and project tasks quickly and share reports to multiple employees efficiently. The effect within OpenAir is the same as assigning the employees individually to projects and project tasks or sharing reports to individual employees.

Assignment groups are useful when you have tasks that need to be assigned to a large number of employees such as on internal or administrative projects. You can create an assignment group that contains all company employees and use this assignment group to assign all employees to tasks such as training, vacation, and holidays. The hours set on an assignment group on a task can either be split evenly among the group or kept the same across each employee in the assignment group. Another use is where you may have a group of resources with similar skills and can be interchangeable on a project task. To avoid having to set up each resource on the task when they begin work, the assignment group provides a simple solution.

Assignment Groups Best Practice Guidelines

Assignment groups are a convenient way to manage assignments for sets of users. However, excessive usage of assignment groups will lead to performance issues.

Assignments are stored in the `project_task_assign` table, and OpenAir uses this table heavily for various purposes. Excessive usage of assignment groups, especially if they contain many or all users, will lead to excessive growth of and updates to this table, which can cause performance issues. You should use other features instead of assignment groups where possible, depending on your requirements. You can use the following guidelines for best performance:

- **To grant access to all tasks in a project for a set of users**, contact OpenAir Customer Support and request the following feature: **Allow users to access all tasks, not only the ones they are assigned to**. After you enable this feature, you only need to use the assignment group on one task in the project, instead of all tasks.
- **To grant access to a specific task for all users**:
    1. Contact OpenAir Customer Support and request the following feature: **Allow all users to log time and expenses to a task**.
    2. On the task properties form, check the **Allow all users to log time for this task** box and click **Save**. All users will have access to this task

Note: It is acceptable to use assignment groups heavily, depending on your business requirements. For best performance, where possible:

- Avoid overusing assignment groups with all or most users.
- Try to find alternative access control solutions, instead of creating many assignments to assignment groups contain hundreds or thousands of users.
- Ensure that the task start date and end or finish date are as close together as possible. Longer durations will result in larger project recalculations and will degrade performance.

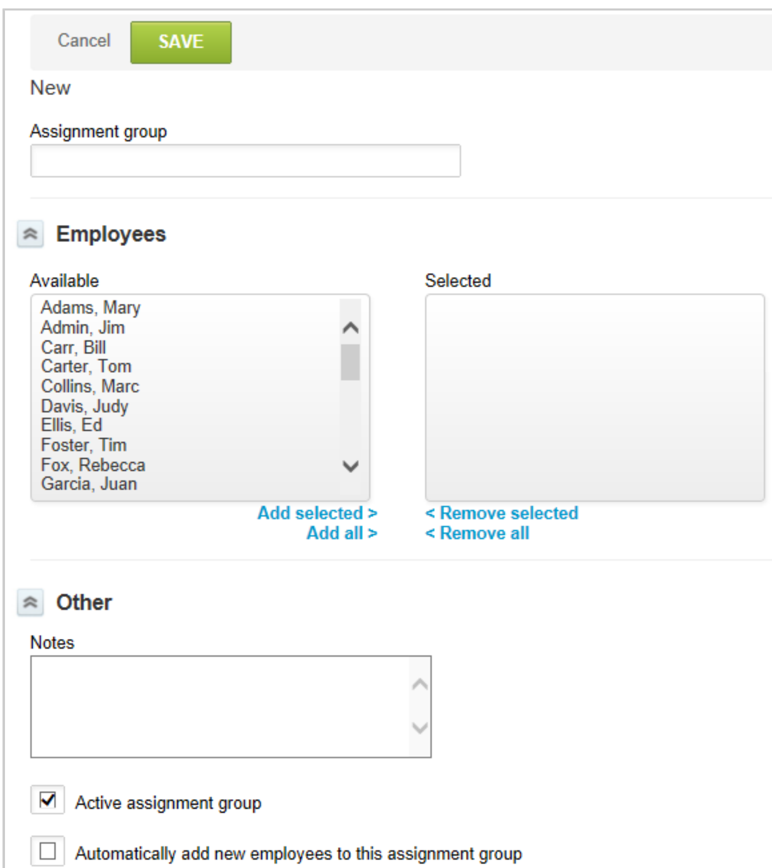
Creating an Assignment Group

OpenAir lets you create assignment group and include any number of active employees to the assignment group.

To create an assignment group:

1. Go to Administration > Application Settings > Projects > Assignment groups.
2. Click the Create button then **New Assignment group**.

   The new assignment group form appear.



3. Enter a **Name** for the assignment group.
4. Select the **Employees** to include from the Available list, and click **Add selected**.
5. Enter Notes describing the purpose and use of the assignment group.
6. Check the **Active assignment group** box to make this assignment group active.
7. Click **Save**.

> **Tip:** If you have an assignment group for all employees, you can reduce administrative maintenance by enabling the Automatically Add New Users to Assignment Groups optional feature. See the help topic Automatically Add New Users to Assignment Groups.

Adding an Assignment Group to a Task

After you have created assignment groups, you can assign them to a task in the same way you assign named or generic resources to a task.

To add an assignment group to a task:

1. Go to Projects > Projects > [*Select a project*] > Phases/Tasks > List > [*Select a task*]
2. On the task properties form, scroll down to the Assignments form section.
3. Under the **Assigned to** column header, select the assignment group containing the resources you want to assign to the task from the dropdown list.
4. Click **Save**.

Extended Category Feature: Service line 1 - Service line 5

Administrators now have the option of creating five new Service Lines 1 - 5. These act in a similar manner to the default “service” feature in the application and transactions in OpenAir can be split across service lines for reporting purposes.

To use this feature, you must contact OpenAir Customer Support and request that the following internal switch be enabled: Enable extended category feature. This lets you create the additional lines and puts service 1 - 5 as selectable fields on revenue recognition rules.

> **Note:** You may also want to enable a combination of the following switches. Each option below is independent for each extended service.

- Enable the feature to determine the service 1 line - service line 5 to be set in transactions by searching the task and phase work breakdown structure. This means that it looks at each task and uses what is selected on that task.
- Enable the feature to specify and require the top-level phase to be used to determine the service 1 line - service line 5 to be set in transactions generated by recognition rules and billing rules. Top-level is the highest parent phase of a task whether the task is part of a phase or the phase is part of another phase. While you can override these at the bill rule and recognition rule level, you can use them to automatically specify the activity for a service at the top-level phase.

The service value set on the top level task is stamped on all transactions associated with the phase including:

- tasks
- receipts
- project billing transactions
- charges (slips)
- charge projections (slip projections)
- revenue recognition transactions
- revenue projections
- purchase orders

To create a New service 1 line (applies to service line 2 - 5 also):

1. Go to Administration > Application Settings > Projects > Service 1 lines.
2. Select **New Service 1 line** from the **Create Button**.
3. Name the Service 1 line.
4. Add notes to clarify the use of the service 1 line.
5. Click Save.

> **Note:** Repeat this procedure to create a new service 2 line, service 3 line, service 4 line, and service 5 line. Ensure you enable the correct internal switches for each service line as well.

Projects Best Practice Guidelines

Review the following best practice guidelines:

- OpenAir has several features which let you optimize project recalculation when adding or modifying tasks to projects. The optimization improves loading time for task list, outline and Gantt views after creating, duplicating, deleting, or modifying a task associated with the project you are viewing, or after moving or copying a task to another project. See Project Recalculation Optimization.
- If your employees record internal time or PTO against one or more primary projects in OpenAir, the number of time entries and hours recorded against these projects grows large over the years. When the number of hours recorded against an Internal time or PTO project reaches 1 million hours, you

should archive or deactivate the project, and create a new project to continue tracking internal time or PTO. See Replace Internal or PTO Projects with Time Entries Totaling Over 1 Million Hours.

Project Recalculation Optimization

OpenAir has several features which let you optimize project recalculation when adding or modifying tasks to projects. The optimization improves loading time for the following views after creating, duplicating, deleting, or modifying a task associated with the project you are viewing, or after moving or copying a task to another project.

- Projects > [*Select a project*] > Phases/Tasks > List.
- Projects > [*Select a project*] > Phases/Tasks > Outline — Create, delete, duplicate, copy, move, repeat tasks.
- Projects > [*Select a project*] > Phases/Tasks > Gantt — Create, delete, duplicate, copy, move, repeat tasks.

By default, OpenAir recalculates the project plan and reloads the view every time the user makes a change to the task, phase or milestone. The following features change this default behavior to optimize project recalculation. You can use any of these features in combination or independently.

- **Run the project recalculation manually** — This enables users to make any number of changes to the project plan first, and run the project recalculation manually at any time. See Enabling Employees to Run the Project Recalculation Manually.
- **Restrict Project Recalculation to Tasks Impacted by the Changes on the Project Outline, Gantt and Task Detail View** — By default, the project recalculation includes all the tasks associated with the project. This feature restricts the recalculation to tasks that are impacted by the change instead of all tasks in the project. For example, if you change the planned hours for a resource assigned to a particular task, the recalculation will include only the specific task and any successor tasks. None of the other tasks are included in the recalculation. For more information, see the help topic Restrict Project Recalculation to Tasks Impacted by the Changes on the Project Outline, Gantt and Task Detail View.
- By default, the project is recalculated automatically only after a field that requires recalculation was changed. Fields that require recalculation when changed include assignment hours/users, start/finish dates, predecessors, for example. Changes to task type, service, or custom fields, for example, do not trigger the recalculation. However, your OpenAir account may be configured to trigger project recalculation always after editing a task on the project outline view. To review whether the internal configuration setting **Always trigger project recalculation always after editing a task on the project outline view** is enabled for account, contact OpenAir Customer Support.

Enabling Employees to Run the Project Recalculation Manually

This feature can be enabled for any project on the project properties form. After you enable the features, employees can add tasks, delete tasks, modify the planned hours for any number of tasks, create repeat tasks or split tasks without having to wait for the project recalculation to complete between each change. Employees can then run the project recalculation manually.

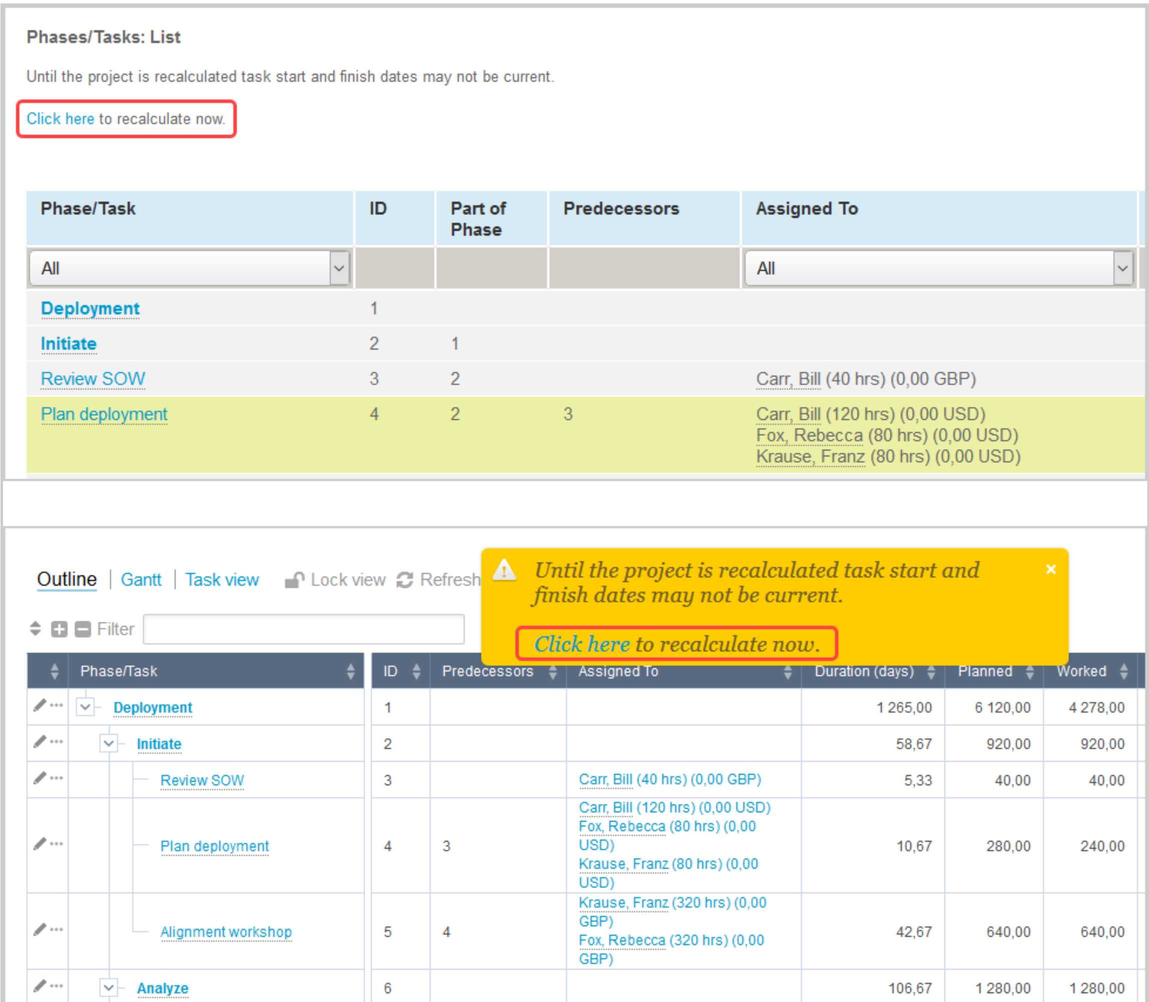
- On the Phases/Tasks > List, Phases/Tasks > Worksheet or Phases/Tasks > Task Assignments views, a link is available at the top of the view. Click the link to recalculate the project.
- On the Phases/Tasks > Outline or Phases/Tasks > Gantt, a warning message appears when you go to the view. Click the link in the warning message to recalculate the project.

To enable employees to run the project recalculation manually

1. Go to Projects > Projects > [*Select a project*] > Properties.
2. Under the General form section, check the **Allow the employee to initiate the project recalculation** box.

> **Note:** If you cannot see the **Allow the user to initiate project recalculation** box on the project properties page, check the form permissions, or contact your account administrator.

3. Click **Save**



Replace Internal or PTO Projects with Time Entries Totaling Over 1 Million Hours

If your employees record internal time or PTO against one or more primary projects in OpenAir, the number of time entries and hours recorded against these projects grows large over the years. When the number of hours recorded against an Internal time or PTO project reaches 1 million hours, you should archive or deactivate the project, and create a new project to continue tracking internal time or PTO.

When you access a projects list that includes hours columns such as **Hours – Approved**, **Hours – Worked**, for example, OpenAir reads the database to retrieve time entries recorded against each project in the list and calculate the total number of hours. If the list data includes projects with hundreds of thousands time entries totaling millions of hours, it can lead to slow list loading time and other negative performance impacts.

When time entries recorded against a project reach 1 million, you should:

1. Clear the **Active** box on the project properties form, or change the **Project Stage** to Closed or Archived.
2. Create a new project to continue tracking time.

> **Important:** Review the following guidelines:
>
> - Use filter sets to control who can access project records that are in a closed or archived stage. Users should be restricted from accessing these project stages for performance reasons.
> - Consider any impact replacing projects used to track internal time or PTO may have on reporting.
> - Consider removing the ability to log time against the project for some time as an iteration step before you deactivate, close or archive the project. To do so, you can close the tasks on the project, or change the project stage to one that is not accessible to end users. Use filter sets to control who can access this project stage.

Other Settings

The Projects application has many configurable parts. You can enable Earned Value Management (EVM) metrics; designate that EVM metrics employee costs are from primary loaded cost, secondary loaded cost, tertiary loaded cost, or job code; and enable different project pricing scenarios.

To access the Projects Other settings:

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

Enable transfers: A cost transfer feature is available within OpenAir when this option is activated. Transfers are set up with a cost rate and bill rate function that permits the cost of an employee to be transferred to another cost center based on the projects worked. The use of the transfer feature is dependent on cost center setup including how cost center settings are inherited (i.e., employee, project, or service) when an employee works on a particular project. When transfers are activated, it prevents the billing of resource project time using the invoice application for the employees and projects that have transfers set up. Projects not involved in transfer setups are not impacted.

Enable task assignment at the project level: This option can only be enabled if you input planned hours at the task level rather than the assignment level. Send an email request to OpenAir Customer Support if you are not sure of your configuration. This feature lets you assign a set of employees to tasks on tasks on the task form by checking the Use the project assignments box. Employees may still be selectively assigned if the box is cleared on the task. This is typically determined during account configuration, but send an email request to OpenAir Customer Support if you want to change it.

Use a scrolling picker to assign employees to tasks: Employee selection by default is handled by a selection list with highlighting of desired employees on the left and adding them to the right for assignment. Assignments using a selection list do not have the ability to select individual employee planned hours nor other employee level value settings depending on internal switches activated in your account. Activating the scrolling picker gives you a row-by-row view of employees with each row allowing a drop-down list of employees to be assigned.

Enable task cost and billing projections: Activation of this option permits OpenAir to compute and display forecasted costs at the task level in the project outline view (for employees based on their cost rates or cost overrides on the project or task, if those features are activated) using the task assigned hours. Financial projections for billing are performed and displayed based on the employee assigned hours. If this option is not activated, you are not able to view the forecasted employee cost or billing from the outline view of the project. This calculation is hard coded and cannot be changed. Use Reports to view a more customizable view of projections.

Enable manual override of task cost and billing projections: Activation of this option permits the computed value by OpenAir on each task to be overwritten manually. Use of this option is helpful in unit pricing or fixed fee pricing or cost (such as a subcontractor) at the task level.

Enable project rate cards to be used in billing projections: Activation of this option provides the ability to calculate projected billing forecasts based on rate card rates rather than employee hourly rates. This option requires the “Enable task cost and billing projections” feature to be switched on. To use this feature, select Rate card from the Projected Billing options for the project and the required rate card to base the calculation on. The job code is taken for the employee and can be overridden at the task assignment. If the job code is not found on the rate card then a warning is issued and the hourly rate is used in the calculation. See also the “Use zero rate for billing projections when no job code is available” feature.

Use zero rate for billing projections when no job code is available: This feature can be used when the “Enable project rate cards to be used in billing projections” feature is switched on. Activating this feature will result in a zero value being taken for employees that do not have a rate card rate defined for their job code on the rate card specified for the project.

Make the task percent complete drop-down read-only: Enable this setting to make the percent complete drop-down on tasks read-only for all users.

> **Important:** You should check this box if OpenAir calculates percent complete automatically, that is, if hours remaining or "Update percent complete as approved hours divided by planned hours" are enabled. If this drop-down is editable and OpenAir is auto-calculating, a user can change the dropdown, but the selection will revert to the calculated value on subsequent updates of approved/planned/estimated hours.

Require service in tasks: If you have implemented services, this option lets you make this field required for all tasks when the form is created or modified. This requires you to define a complete set of services so that a valid value is always able to be selected for any type of task. Checking this option is particularly important if you have checked the timesheet option to retrieve the service from the task for timesheets if one is not entered or the option to always get the service from the task. The task level service setting may be passed to timesheet and included or overridden in billing rules and recognition rules based on service settings within the rules. Service settings are not kept historically on a task but are recorded historically on timesheet entries that pick up the service from the task level.

Use only invoiced charges for WIP calculations: WIP or Work-In-Process is an accounting computation regarding the state of revenue recognition based on revenue recognition and invoicing. This is only derived in reporting, no WIP transaction is generated with the application. Depending on your accounting practice and the setup of billing rules within OpenAir to drive your revenue recognition, charges may be created that are used for revenue recognition but not invoicing. An example is a fixed price project which has an hours complete revenue recognition policy. If you are generating two sets of charges for this situation, one set of charges is used for invoicing (the fixed amounts) and the other is used to drive revenue recognition (as billed). WIP in this case should only be based on invoiced charges so this option would be checked. Likewise, any deferred billing charges would also not be included in WIP if they were not added to an invoice.

Enable project-wide resource substitution: Resource substitution can be done on the task level with or without this option by selecting the resource name and selecting a substitution candidate from the list provided via the search criteria option set (see below). The team link within a project also provides a list of employees which can be substituted by selecting their name within the team link. Activating this option permits a project wide substitution of a resource if selected within the team link. The employee does not get an option to pick which tasks should be substituted when this option is activated - all tasks have the resource substituted to which they are assigned.

Search criteria for finding a resource to substitute for another on a task assignment: The search criteria is a pattern match of the selected employee among all other employees and generics that are active in OpenAir for possible matches. The resource profile match depends on the skill database setup you've put in place. Depending on the complexity of the skill database, resource matching may become too unique and therefore limit or eliminate viable candidates due to a missing profile element. The job code value per employee is a one-to-one setting so a match is more likely due to the simplicity of data entries. If you have not set up a skill profile, then using this search criteria returns a list of all active employees/generics since an empty profile matches among all employees.

Exclude project constraints from search criteria during resource substitution search by profile: Activation of this option removes any availability of resource checks when performing a profile match against employee and generic candidates.

Require a service selection in recognition rules: Recognition rules inherit the service passed on billing transactions and charges, if you have set up services within OpenAir, unless it is overridden on the recognition rule. If your policy is to control the service settings to match your revenue recognition accounting policy (such as a specific account used to capture revenue in your accounting system), activate this option to require a setting of the service, which overrides any service setting from the billing transaction or charge. This requires you to define a complete set of services so that a valid value is always able to be selected for any type of revenue.

Task percent complete interval choices: You have the option to define how precise the % complete value is used within OpenAir. A 5% interval is a popular choice for ease of customer communication.

Employees available for assignment to a project: Options that make employees available for assignment provide control over which employees are viewable for project or task assignment by your project setup resources. The booked employees or all if none booked permits an open employee selection unless an employee has been booked to the project. After an employee is booked then only booked employees are displayed. If you use assignment groups, this option is viable provided no employees are booked. After an employee is booked, the ability to use assignment groups on the project is removed. Booked employees option displays only employees booked to the project. All employees always displays all employees, including assignment groups. This can be used for generics and regular users alike.

Enable support for select resources to always be available for assignment to a project: If checked, this trumps the "Users available for assignment" setting.

> **Important:** Requires a custom field named exactly "resource_always_assignable" to be created.

Project pricing scenarios can get hours from: The pricing feature within the project uses hours set up under scenarios to compute a project price. There are three possible ways to use hours for the scenario setup: Estimated hours, Booked hours, and Assigned hours. You may opt to allow all three scenarios during setup or identify a specific one which drives your employees to a standard for pricing. Estimated hours are entered within the pricing feature as hours per job code which drives the scenario. Booked hours are the employee bookings entered via the project booking worksheet or resource booking tab. Assigned hours are those entered on tasks with employee assignments. Any resource type (regular or generic) may be used for the pricing scenarios. Booked hours and assigned hours for pricing may use Generics to earmark the type of resource needed if the project is a proposal or for the actual resource on the project if a contract extension is being forecasted.

100% field for project pricing reports: When setting up a pricing scenario, an analysis displays opportunity revenue, gross revenue, and net revenue. This option lets you define how the %'s are treated on the analysis report by selecting a revenue type as the base for 100%. For example: If gross revenue is selected, then the % of opportunity revenue and net revenue are computed against the gross revenue amount.

Project pricing probability interval choices: You have the option to define how precise the % probability value is used within OpenAir. A 5% or 10% interval are popular choices to use for a pipeline maturity process.

Enable workspace member synchronization: When creating a project, you may also create a workspace associated with the project. The workspace may pre-exist and be copied or be initially created when the project is created. Selecting this option permits all employees involved with the project via task assignments to be included automatically as members of the workspace with read/write capability. Unchecking this option permits manual control of workspace membership by the project manager or project creator via the Workspaces application. If you do not create workspaces when creating a project, then this option has no system impact checked or unchecked.

Inactivate project when all tasks are closed: A project active check box is separate from the individual task closed check boxes. A project may have all tasks closed but still remain active for timesheet and expense report capturing provided tasks are not used on these items. Checking this option automatically inactivates (or clear the **Active** box) the project when all tasks are closed.

Mark closed tasks 100% complete: The % complete field may be manually set or computed automatically by OpenAir. If this option is unchecked, then closing a task by checking the **Closed** box keeps the % complete as it was set when the task is closed. Checking this option changes the % complete field automatically to 100% if the task is closed. Use of this feature is both dependent on your project management methodology and possibly your customer billing if it is driven by a fixed fee on % complete of the project, phase, or task.

Closing a phase will close all sub-phases and sub-tasks within that phase: A time saving feature that permits a complete closure of a phase including sub phases and sub-tasks if the phase level is closed (checking the **Closed** box on the phase). If this option is not checked then the phase may be closed while leaving sub-phases and sub-tasks open.

Disable “Pull OpenAir resources” menu item in OpenAir Projects plugin: This option involves the use of the OpenAir Project Connector add-on service. When using the Project Connector to import a project, the resources identified within the Microsoft Project plan may be mapped to valid active resources within the OpenAir application. Checking this option disables the resource mapping feature, which disables the import of employee assignments to tasks when the project plan is imported.

Require a charge description on billing rules: Billing rules define how customer invoicing is done and may drive revenue recognition. The charge description field is included on generated charges when the rule is executed. By default the field is left blank and may be entered optionally either within the rule which applies the entry to each generated charge or on individual charges when manually edited by an employee with the appropriate permissions. Charge descriptions may be displayed on an invoice. If you have defined an invoice format (layout) that displays the charge description, you may consider making the charge description field required to ensure information is available for invoices.

Require a charge service on billing rules: Time billing rules inherit the service passed from a timesheet, if you have set up service within OpenAir, or be blank unless it is overridden on the billing rule. If your policy is to control the service settings to match your customer invoicing accounts (such as a specific account used to capture receivables in your accounting system), activate this option to require a setting of the service, which overrides any service setting from the timesheet. This requires you to define a complete set of services so that a valid value is always able to be selected for any type of billing. This forces a selection of a service on billing rules other than time billing if your business requires services on billing transactions.

Enable project issues: Issue tracking is an optional feature within the Project applications which permits employees to capture project issues, tracked due dates and close dates, assign issues to employees, and track general information such as the type of issue or state of the issue. When the feature is checked, a series of Issues configuration items are available including Issue Stages, Issue Categories, Issue Sources, and Issue Severities. See Issues.

Issue prefix: By default issues have a prefix of IS- unless you choose to override the it. To reset the prefix, enter a new value in the text box next to the prefix pull down and save the form.

Show totals for numeric, hours and days task custom fields on project outline: By default, custom fields of numeric, hours, or days type do not automatically display total amounts when value on the tasks are rolled up to a project total. Checking this option permits the display of task custom fields of these types to appear at the project outline level. When this option is unchecked, the task level custom fields are not available for display in the project outline.

Require unique project names by customer: Many of the menu drop-down lists display customer : Project entries, which may make it difficult to select values unless they are unique. Employees may see project uniqueness via an assignment, the booking process or having a filter set assigned, which limits projects the employee can access. However, unique project names may still exist. To ensure project names are unique for each customer, check this option.

Enable task successor assignee notification custom field feature: When you enable this feature, you create a Project check box custom field that you can select to notify task assignees when predecessor tasks are marked 100% complete or closed. This can be set as a default value for all projects, and when you create a project from another project, if you choose the option to Duplicate notification settings, you can copy the value of the custom field.

Enable Earned Value Management (EVM) metrics: Earned Value Management metrics allow companies to have increased visibility into project status and profitability. Using data from planned and completed work within OpenAir, managers can readily assess the state of their projects. Schedule and cost metrics provide valuable understanding into the health of your projects. The EVM metrics include: Planned Value (PV), Actual Cost (AC), Earned Value (EV) as a monetary value, Earned Value (EV) as a percent complete value, Budget Variance (BV), Cost Variance (CV), Schedule Variance (SV), Cost Performance Index (CPI), Schedule Performance Index (SPI) and Critical Ratio (CR).

Method to use when computing 'Earned Value Percent Complete' for projects and phases: Two methods exist for the accounting of earned value. The weighted by cost method permits a cost tracking model of the hours worked. This means more expensive resources increases the earned value results. The unwatched method applies hourly cost values evenly among resources, which results in a strict hours worked earned value model.

EVM metrics employee costs are from: When using Earned Value Metrics, you have several selections you can use to specify where employee costs are determined. These are: Primary loaded cost, Secondary loaded cost, Tertiary loaded cost, and Job code. OpenAir provides you with the ability to assign three levels of costs by employee. In addition, costs can be determined by the Job code. See Job Codes and Cost under Employees.

Require a cost center selection in recognition rules: Enable this setting to require a cost center selection in recognition rules. Forms will error on submission/save if a cost center has not been selected.

Require a charge cost center on billing rules: Enable this setting to require a cost center selection in billing rules. Forms will error on submission/save if a cost center has not been selected.

Gantt chart reordering sorts task IDs: Project plans may be complex and long. There may be a need for project managers to adjust tasks by moving them up or down in the timeline of a plan. The Gantt view provides visibility into the progress of a project, as well as the ability to easily re-order tasks and phases leveraging up/down arrows. When you enable this feature, OpenAir sorts the Gantt view by automatically re-ordering tasks in the Outline view based on the revised order in the Gantt view.

> **Note:** There is an option located in the hints section of the Gantt view: Click here to re-order task IDs by current chart order. This option accounts for existing projects that have tasks that should be sorted based on the Gantt order.

Default tab for projects: Select the default tab to show when users go to Projects > Projects > [*Select a project*] unless a different default tab is set at the user level. If the user does not have access to the default tab, the first tab on the left is shown instead. You can select a specific tab or the metavalue `[Company default]` configured for your OpenAir account. To change the Company default tab, contact OpenAir Customer Support.

> **Note:** Users can set their default tab preference in Personal Settings.

Enable prevent deletion of employee assignment with logged hours: When this option is enabled a warning is displayed to prevent the deletion or substitution of a user from a project task when the user has already logged hours.

Frequently Asked Questions

How does the Split Task work in Projects?

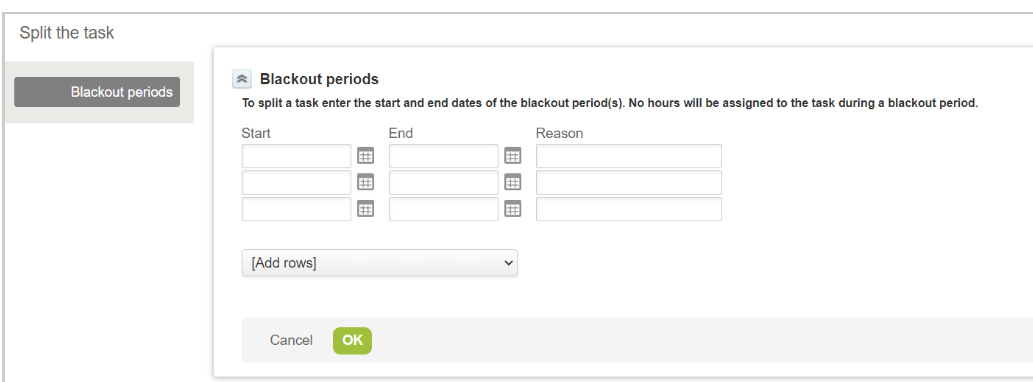
The Split Task functionality lets you include breaks part way through a project task. You can split the task into periods when work will be done (hours are assigned to resources) and break periods when no work will be done (no hours are assigned to resources). The task duration or the percentage of assigned resources time is recalculated automatically in function of the break periods and the planned hours for the task.

The Split Task functionality is available on the task entity form whenever you create or modify a task.

To split a task

1. Go to Projects > Tasks > [*Select a task*].
2. Click **Create** next to “Split the task” under the Other section of the task entity form.

   The Split the task popup appears.

3. Each row on the form corresponds to a break period. For each break period (blackout period):
   a. Enter a **Start** and **End** time.

OpenAir

b. (Optional) Enter a **Reason** for the break.

> **Note:** The Split the task form shows three rows by default. To add additional rows, click the **Add rows** dropdown field and select the number of rows to add.

4. Click **OK** to close the Split the task popup and return to the task entity form.
5. Click **Save**.

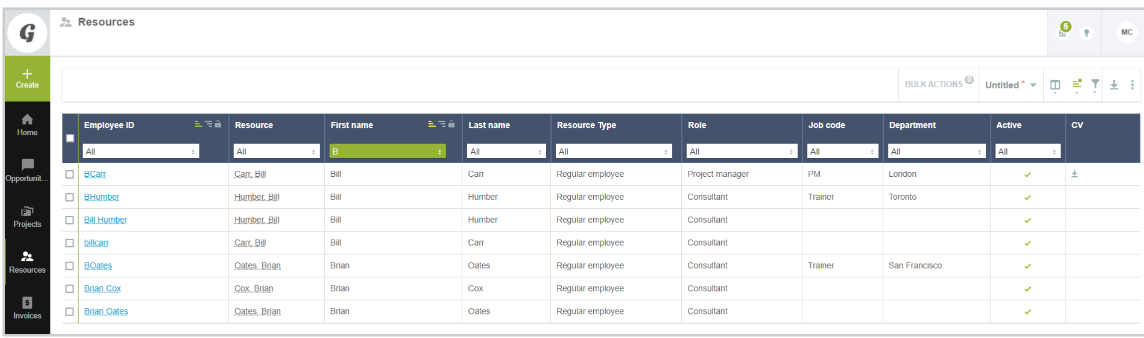
Resources

Overview

The Resources application gives you the ability to set up an entire skills database called the Resource Profile, complete with attributes per entry. The elements included are Skills, Education, Locations, Job Roles, and Industry. You may expand the Resource Profile options for your company to include up to an additional 35 custom elements that you define based on your personnel requirements.

The default application terminology for the allocation of resources to projects is booking. The Resources application helps you collect and assign the resources your company has available for booking to specific projects, and even to tasks within those projects. The intention of the resource bookings is to properly assess a forecast of your company's resource needs. The Resources application lets you:

- List all resources for a particular time period and see what percentage of time they are booked.
- Display a worksheet for resources and a booking worksheet for a particular project as well as a chart that graphically shows metrics such as availability, booked time, time off, and holidays.



For more details on Resources, see the following help topics:

- Attribute Sets
- Tech Skills
- Education
- Locations
- Job Roles
- Industries
- Customizable Skill Level Descriptions
- Resource Booking Planner
- Resource Compare View
- Advanced Resource Search
- Resource Demand Request (RDR)
- Booking Chart
- Booking Types
- Generics
- Resource Profile
- Consolidated Resource Profiles

- Skills Approval
- Search - Resources Application
- Booking Request Layout
- Notifications

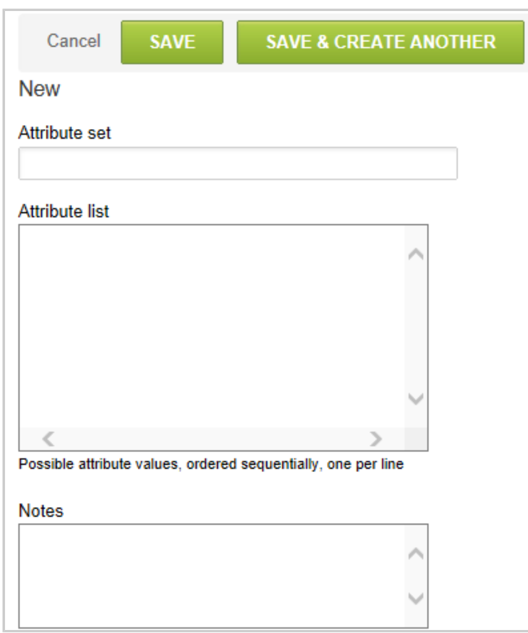
  See Notifications under Global Features.
- Approval Processes

  See Approval Routing under Global Features.

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

- Alerts
- Resources Other Settings
- Frequently Asked Questions (FAQs)

Attribute Sets



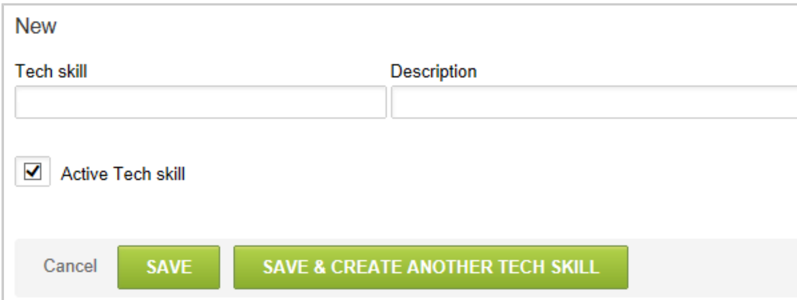
Attribute sets allow you to designate a measurement of resources according to their skill set, education, or other custom characteristic defined in OpenAir.

To create an Attribute set:

1. Go to Administration > Application Settings > Resources > Attribute sets.
2. Select **New Attribute set** from the **Create Button**.
3. Enter the Attribute set name and then list the values your company uses in the Attribute list. Defined Attribute sets are then available to associate with one or more tracking elements of the skill database. Attribute sets are only used on skill database tracking elements.

4. Add Notes, if desired.
5. Click Save.

Tech Skills



Tech skills document the talents a resource has that are required by your organization. It is one of the standard Resource Profile elements provided by OpenAir. The tech skills link only displays in Resources Settings if you have activated this as a Resource profile option. See Resource Profile.

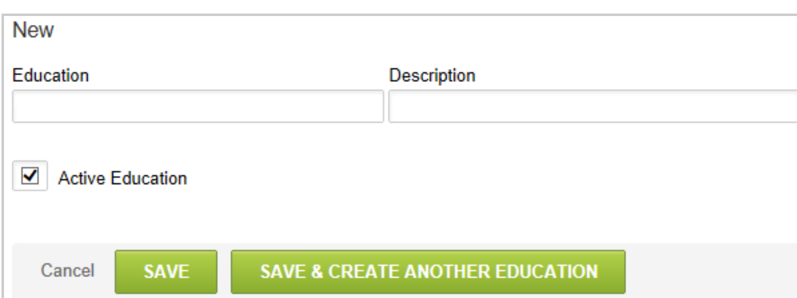
You can define tech skills at a very broad level, using terms such as Database or Functional, or you can use specific skills such as SQL Server database or Oracle EBS 11i. One or more skills may be assigned to an employee resource depending on the Resource Profile configuration. You use tech skills when you search for appropriate and available employees to assign to a project. Skills also provide reporting capability in OpenAir.

To create Tech skills:

1. Go to Administration > Application Settings > Resources > Tech skills.
2. Select **New Tech skill** from the **Create Button**.
3. Type the Name of the Tech skill.
4. Add Description, if desired.
5. Select the check box for Active Tech skill.
6. Click Save.

> **Note:** Tech skill profiles may be disabled for your account. If you would like Tech skills to be available in, or removed from Administration > Application Settings > Resources > Industries, contact OpenAir Customer Support.

Education



Education represents the level of education an employee resource has attained. It is one of the standard Resource Profile elements provided by OpenAir. The Education link only displays if you have activated this as a Resource profile option. See Resource Profile.

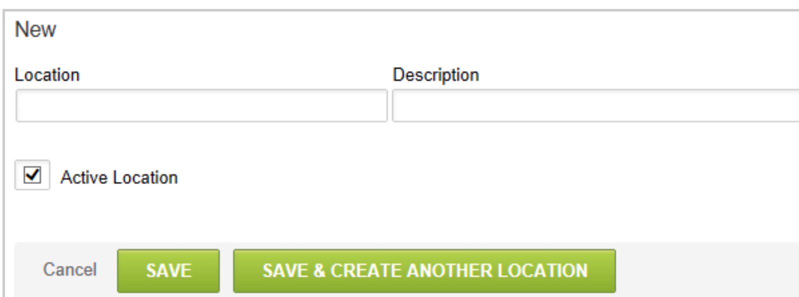
You want to define Education entries in such a way that they can be tracked by your HR department or needs of your customers. Education entries provide an additional search and reporting capability in your OpenAir account.

To create an Education record:

1. Go to Administration > Application Settings > Resources > Education.
2. Select **New Education** from the **Create Button**.
3. Type the Name of the Education record.
4. Add Description, if desired.
5. Select “Active Education”. When “Active Education” is selected, the education will appear as a selectable option for users.
6. Click Save.

> **Note:** Education profiles may be disabled for your account. If you would like Education to be available in, or removed from Administration > Application Settings > Resources > Industries, contact OpenAir Customer Support.

Locations



Locations specify where an employee resource lives or what office they are assigned to. It is one of the standard Resource Profile elements provided by OpenAir. The Locations link only displays if you have activated this as a Resource profile option. See Resource Profile.

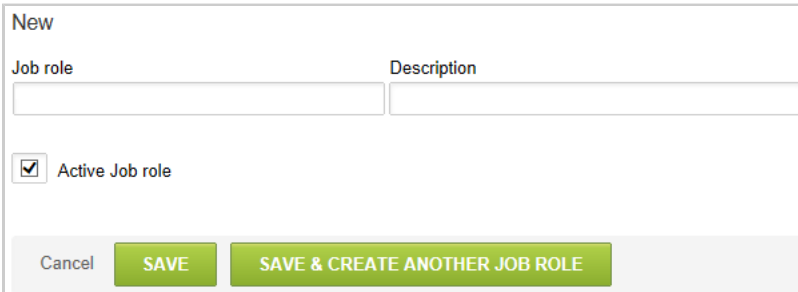
Many Customers require resources that are located near their project site to reduce expenses. Define the locations as is appropriate for your company and your resources. Locations can provide an additional search and reporting capability in your OpenAir account.

To create Locations:

1. Go to Administration > Application Settings > Resources > Locations.
2. Select **New Location** from the **Create Button**.
3. Type the Name of the Location.
4. Add Description, if desired.
5. Select the check box for Location.
6. Click Save.

Note: Location profiles may be disabled for your account. If you would like Locations to be available in, or removed from Administration > Application Settings > Resources > Industries, contact OpenAir Customer Support.

Job Roles



Job roles provides an ability to track past job experience by role. It is one of the standard Resource Profile elements provided by OpenAir. The Job roles link only displays if you have activated this as a Resource profile option. See Resource Profile.

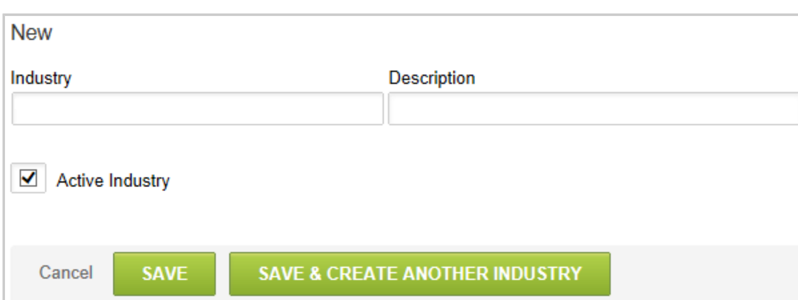
The Job role can be a job title or can define job duties or responsibilities. Job role definitions are not related to Job Codes or roles as defined in the Roles Overview.

To create Job roles:

1. Go to Administration > Application Settings > Resources > Job roles.
2. Select **New Job role** from the **Create Button**.
3. Type the Name of the Job role.
4. Add Description, if desired.
5. Select the check box for Active Job role.
6. Click Save.

Note: Job role profiles may be disabled for your account. If you would like Job roles to be available in, or removed from Administration > Application Settings > Resources > Industries, contact OpenAir Customer Support.

Industries



Industries can provide you with a snapshot of which resources are suitable for a particular project. It is one of the standard Resource Profile elements provided by OpenAir. The Industries link only displays if you have activated this as a Resource profile option. See Resource Profile.

An Industry may involve a direct relationship such as working for a firm within the specified industry, or it may be defined indirectly such as a consultant supporting various industries. Some customers may require a certain level of industry knowledge to have employees engaged on their projects. Industries provide an additional search and reporting capability in your OpenAir account.

To create Industries:

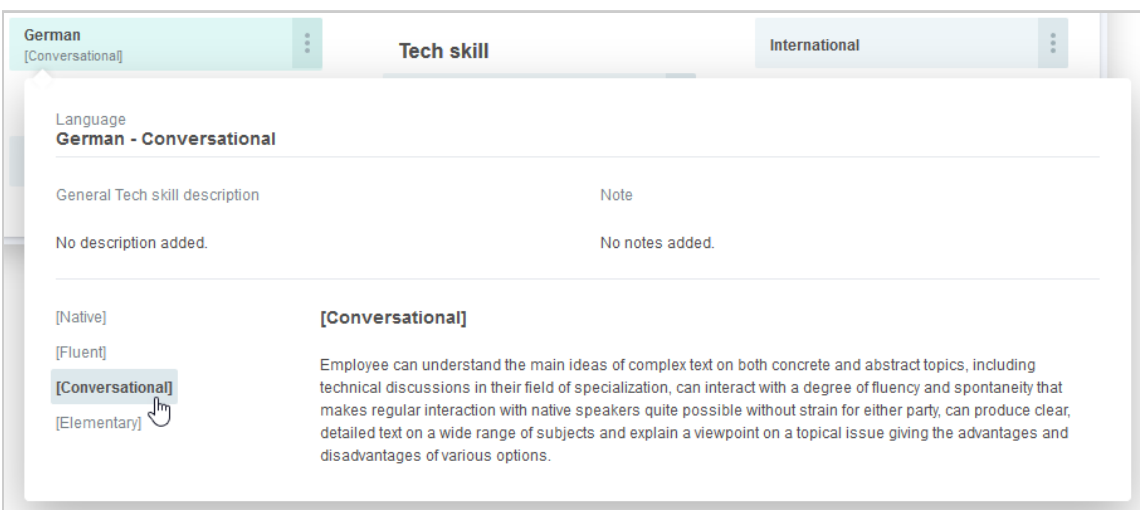
1. Go to Administration > Application Settings > Resources > Industries.
2. Select **New Industry** from the **Create Button**.
3. Type the Name of the Industry.
4. Add Description, if desired.
5. Select the check box for Active Industry.
6. Click Save.

> **Note:** Industry profiles may be disabled for your account. If you would like Industries to be available in, or removed from Administration > Application Settings > Resources > Industries, contact OpenAir Customer Support.

Customizable Skill Level Descriptions

Add descriptions to skill levels to help your resource managers assign the right competency level to each resource.

You can point to a skill on the consolidated resource profile, to view a skill description panel including a general description and a description of the competency level selected for that skill. To view the description for another competency level, point to that competency level on the skill description panel.



To add descriptions for competency levels:

1. Go to Administration > Application Settings > Resources > [*Select a category*]. Select a category which contains skills and skill levels, such as “Education” or “Language”.

   The list view for the selected category appears.

2. Click a skill name. The skill entity form appears.
3. Under the Attribute descriptions section, enter a description for each competency level.
4. Click **Save**.

Resource Booking Planner

The resource booking planner provides a global view of bookings and resource utilization calculated per day, week, or month. You can drag bookings from one resource to another to reassign them, and you can also change the bookings start date, end date and duration with a simple mouse interaction. The resource booking planner provides a visual overview of bookings and utilization, and lets you identify and resolve booking conflicts and resource overutilization.

> **Note:** If the Resource Booking Approvals feature is enabled for your account, depending on your OpenAir account configuration, bookings with the approval status "Submitted" or "Approved" cannot be modified. You cannot drag to change the start date, end date, duration or resource booked from the Resource Booking Planner view.

To enable the Resource Booking Planner feature, contact OpenAir Customer Support. When the feature is enabled, the following role permissions and application settings are available:

- Role permissions
  - View resource planner
  - Create and modify bookings in the resource planner
- Application settings (Administration > Application Settings > Resources > Other Settings)
  - **Resource planner booking bar format - text options in drop down** — Select the default format for the text showing on booking bars.
  - **Disable daily option in resource planner** — Check this box to hide the Daily utilization calculation option for all resource booking planner users.
  - **Disable monthly option in resource planner** — Check this box to hide the Monthly utilization calculation option for all resource booking planner users.
  - **Disable weekly option in resource planner** — Check this box to hide the Weekly utilization calculation option for all resource booking planner users.

To access the resource booking planner, go to Resources > Bookings > Planner. If QuickViews are enabled for your account, you can also click **Booking Planner** from the QuickView window.

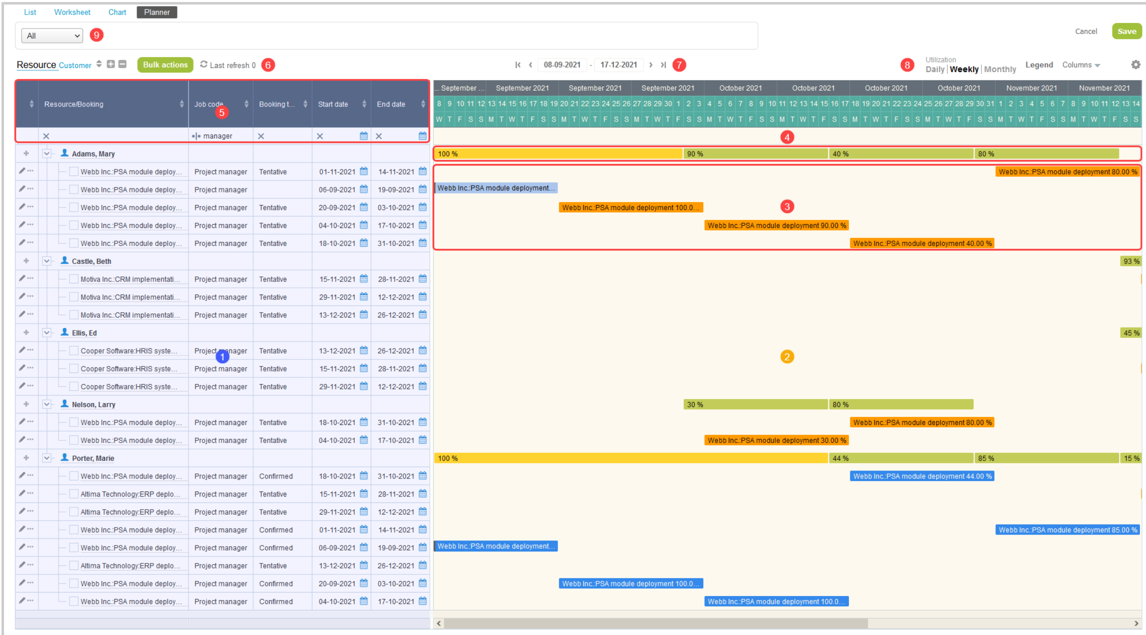
Review the following help topics:

- Resource Utilization Overview in the Resource Booking Planner
- Breakdown by Customer, Project and Task in the Resource Booking Planner
- Creating, Editing, and Deleting Bookings in the Resource Booking Planner
- Resource Booking Planner View Options and Settings

Resource Utilization Overview in the Resource Booking Planner

The resource utilization overview is the default resource booking planner view. It shows a list of resources and bookings with a graphical overview of bookings and utilization for each resource over a period of time.

To access the resource utilization overview, go to Resources > Bookings > Planner and click **Resource** in the resource booking planner toolbar.



1. **Resources and Bookings List** — The left part of the resource booking planner shows a list of resources and bookings for each resource. You can select which columns are shown on the list using the **Columns** panel available from the toolbar.
   - Icons next to the resource name indicate the type and status of resource.
     - User, Jane — Active resource currently assigned to the project.
     - User, Jane — Inactive resource currently assigned to the project. Resources with an inactive employee record cannot log in to OpenAir, and cannot record time or expenses, for example.
     - Analyst [Generic] — Active generic resource. Generic resources let you specify the kind of resource you want to book rather than a named individual. They can be useful as placeholders when planning a project if you do not know who will be conducting the work. Generic resources can only be used for forecasting — only named resources can record time and expenses.
     - Analyst [Generic] — Inactive generic resource.
   - Click the arrow next to the resource name to expand or collapse the list of bookings for this resource.
   - Drag a booking vertically from one resource to another to reassign it.

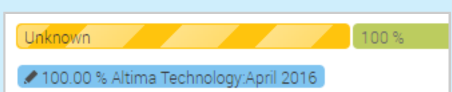
   > **Note:** Bookings are grouped on one row and booking information is not shown if you choose the compact display option for Resources. To change the display options, click the settings icon .

2. **Booking Grid** — The right part of the resource booking planner shows a graphical representation of bookings and resource utilization over the booking grid time span. Days, Weeks and Calendar Months are indicated at the top of the grid. You can control the time span using the time navigation panel in the toolbar.
3. **Booking bars** — Each booking is represented by a horizontal bar spanning the period the resource is booked for.

- A black solid bar at the left or right extremity of the booking bar indicates that the booking extends beyond the start or the end of the time span displayed. Each bar is color-coded depending on the booking type and includes a label with summary information, and an icon indicating the approval status of the booking. You can control the color code and the text format in the resource booking planner settings form available when you click the settings icon .
- Drag a booking bar horizontally to change the booking start date and keep the duration unchanged. You can drag the left or right edge of a booking bar to change both the booking start or end date and the booking duration.
- Click and drag outside existing bars in the booking grid to add a new booking. The new booking form appears in a popup window. The form is prepopulated with resource, project, task, start date, and end date information according to the grid locations you click and drag to.
- Click a booking bar to show a context menu with options to **Create** a new booking, **Edit** the booking, or **Duplicate** it. These actions are also available from the Actions column on the left.

> **Note:** Booking bars are grouped on one row if you choose the compact display option for Resources and there is no period overlap between bookings. Overlapping bookings show on multiple rows. To change the display options, click the settings icon .
>
> If the Resource Booking Approvals feature is enabled for your account, depending on your OpenAir account configuration, bookings with the approval status "Submitted" or "Approved" cannot be modified. You cannot drag to change the start date, end date, duration or resource booked from the Resource Booking Planner view.

4. **Utilization bars** — The utilization of each resource is represented by horizontal bars on the same row as the resource name. The utilization is calculated as a percentage of hours booked compared to the employee's work schedule on a daily, weekly or monthly basis depending on the option selected in the toolbar. The utilization shows as a continuous bar if the utilization is the same across several time granularity units. Each bar is color-coded depending on the availability of the resource. You can control the color code using the Chart color keys section of the resource booking planner settings form.

> **Note:** The utilization information after the page is loaded or after you save changes.
>
> - When the utilization is being calculated, the utilization shows as "Unknown".
> - If you make changes to the bookings, such as changing the start or end date of a booking, for example, the impacted utilization bar shows as "Unknown" until you save the changes and the utilization is recalculated.
>
> 
>

5. Resource and Bookings List **Column Headers** — The column headers include the following functionality:

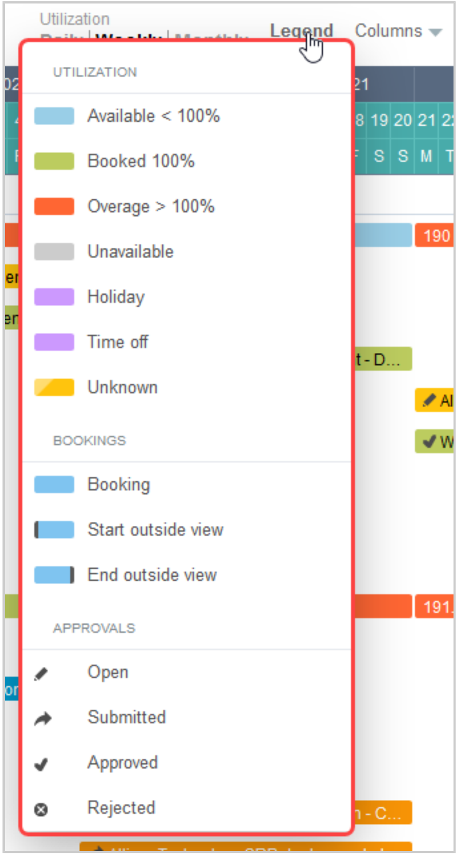
- **Sort Order** — Use the sort icons to change the sort order using up to three sorting levels. See Sorting Options.

- **Column Filters** — Use column filters under the column headers to change the filter the list content. See Filtering Data Using Column Filters.
- **Column Position and Width** — Drag a column to change the column order. Drag the right edge if a column to change the column width.

6. **Toolbar (Left)** — The left part of the toolbar includes the following functionality:
   - **View Selector** — The resource booking planner lets you view a breakdown of bookings by resource or by customer, project, and task.
     - Click **Resource** to get an overview of resource utilization as described in this help topic.
     - Click **Customer** to get an overview of bookings by customer, projects and tasks. See Breakdown by Customer, Project and Task in the Resource Booking Planner.
   - **Sorting Reset** — Click the sorting icon to reset the list to the default sort order.
   - **Expand All/ Collapse All** —
   - **Bulk Actions** — Check the box next to each booking you want to run the action on and click **Bulk Actions**. A window appears listing the available actions.

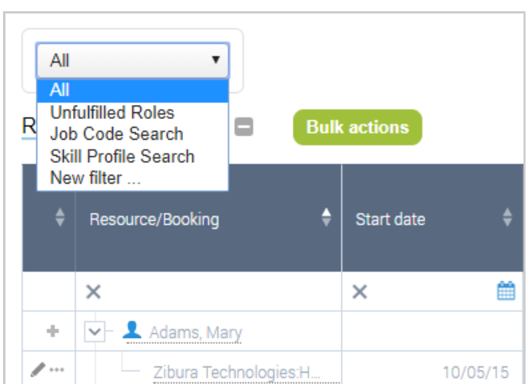
     > **Note:** You can hide the bulk actions check box in the display options. To do so, click the settings icon then Disabled under Bulk actions.

   - **Refresh View** — Click the refresh icon to reload the page and view the latest data. The toolbar shows the time elapsed since the last refresh next to the refresh icon.
7. **Toolbar (Center) — Date Navigation** — Use the date navigation panel to control the booking grid time span. Click and select a start and end date. The maximum time span is 100 days. You can use the rewind, previous, next, and fast forward icons to move the time span backward or forward by 50% or 100% of the current time span.
8. **Toolbar (Right) — Utilization Calculation and Display Options** — The right part of the toolbar includes the following functionality:
   - **Utilization Calculation Time Granularity** — Select the time granularity for the utilization granularity. The utilization is recalculated when you click a different granularity.
     - **Daily** — Utilization is calculated for each day. The share of each booking on each day is used for the calculation. The sum of booked hours per day is divided by the Day schedule.
     - **Weekly** — Utilization is calculated for each calendar week .
     - **Monthly** — Utilization is calculated for each calendar month.
   - **Legend** — Point to **Legend** to show a summary of the utilization color coding, and approval status icons.



- **Columns Selection** — Click **Columns** to display the List view columns flyout panel. Select the columns you want to include and specify the column order. Click **Apply** to validate your changes and return to your list view.
- **Other Settings** — Click the settings icon to access the other resource booking planner settings. See Other Settings.

9. **Advanced Filters** — Use advanced filters to show just the resources and bookings you want to see, or to manage the number of bookings displayed in the resource booking planner.



> **Important:** The resource booking planner can display a maximum of 1,000 bookings. Use advanced filters to reduce the number of bookings displayed and show just the bookings you want to see. Reducing the number of bookings improves the performance and usability of the resource booking planner.
>
> To review the number of bookings, resources and the time span shown on the resource booking planner, click the Tips button. The contextual tips include a summary such as "Showing 278 bookings and 89 resources in 91 days".

Breakdown by Customer, Project and Task in the Resource Booking Planner

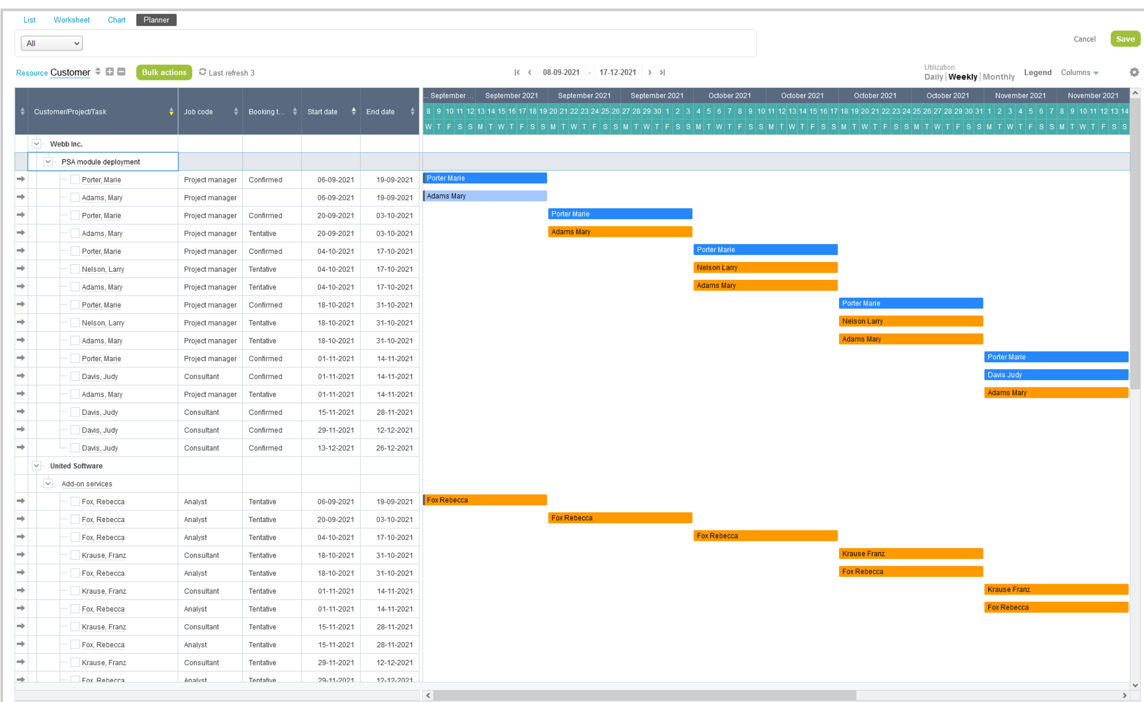
The resource booking planner lets you view a breakdown if bookings by customer, project and task with a graphical overview of bookings for each task over a period of time. It gives an overview of resources booked to each task and project, with indications of resource overutilization.

The functionality and information shown is similar to the resource utilization overview with the following differences:

- The list gives a breakdown by customer, project and task, instead of resource and bookings.
- Resource utilization information is not available.
- Overutilization (or Overage) is indicated with a red outline around the relevant booking bars.
- The Actions column includes a go to action only. Click the arrow icon to view the booking in the resource utilization overview. From there, you can identify what causes the overage and resolve it.

See also Resource Utilization Overview in the Resource Booking Planner.

To access the bookings by customer, project and task overview, go to Resources > Bookings > Planner and click **Customer** in the resource booking planner toolbar.



Creating, Editing, and Deleting Bookings in the Resource Booking Planner

You can create, edit and delete bookings from the resource booking planner.

Creating Bookings

To create a new booking, do one of the following:

- From the resources and bookings list, click the add booking icon next to the resource name. The New booking form appears with the **Resource** field prepopulated. Enter all required information and click **Save & Submit**, **Save**, or **Save & create another**. The utilization is recalculated automatically after you add the booking.
- Frome the booking grid, click and drag in the same row as an existing booking bar. The New booking form appears with prepopulated **Resource**, **Customer : Project**, **Task**, **Start** and **End Date**, and **Book by** information based on the existing booking on that row. Click **Save** in the resource booking planner to save the new booking and other changes made in the booking grid and trigger the utilization calculation.

Editing and Deleting Bookings

> **Note:** If the Resource Booking Approvals feature is enabled for your account, depending on your OpenAir account configuration, bookings with the approval status "Submitted" or "Approved" cannot be modified. You cannot drag to change the start date, end date, duration or resource booked from the Resource Booking Planner view.

To edit a booking, do one of the following:

- From the resources and bookings list, click the **edit** icon . The Edit booking form appears. Make changes as required and click **Save** or **Save & Submit**.
- You can edit the booking start date and end date inline in the resources and bookings list. You can also:
  - Drag a booking bar horizontally to change the booking start date and keep the duration unchanged.
  - Drag the left or right edge of a booking bar to change both the booking start or end date and the booking duration.
- To reassign a booking, drag this booking vertically from one resource to another in the resources and bookings list. Click **Save** in the resource booking planner to save all changes and recalculate the utilization.
- Point to a booking, task, or resource to show the QuickView for that item, then create a new booking, or edit, delete, or clone an existing booking from the QuickView.
- Click the more options icon next to a resource name, then click **Create**, **Edit**, **Duplicate** or **Delete** the booking.
- If bulk actions are enabled, check the boxes next to each booking or task, then click **Bulk Actions** to make changes to all selected items at the same time. It is possible to select an item only if you have the appropriate role permissions.

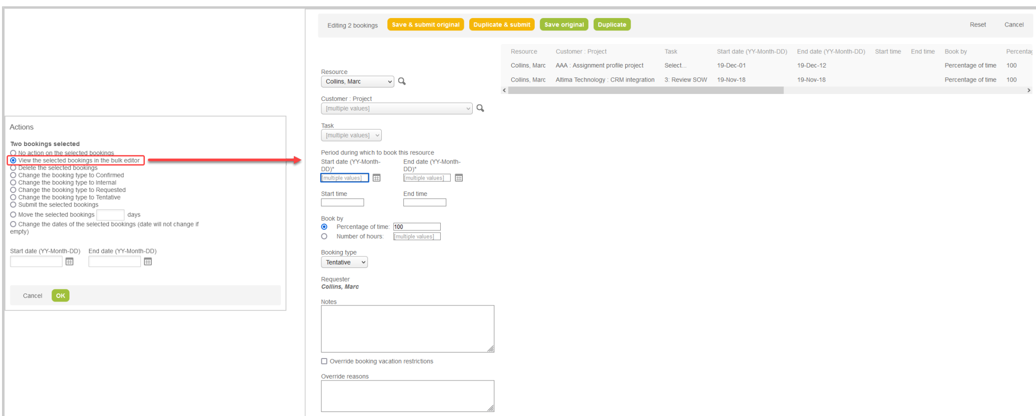
  You can choose **View the selected bookings in the bulk editor** on the bulk actions form. The Bulk Booking Editor feature lets you make changes to multiple fields for all selected bookings at the same time. You can then save or save and submit the modified bookings, or apply the changes to duplicate bookings and save, or save an submit the duplicate, if you want to keep the original bookings unchanged.

Note: To enable the Bulk Booking Editor feature, contact OpenAir Customer Support. OpenAir Customer Support can also configure the Booking Bulk Editor to prevent the following changes:

- Bookings for multiple resources reassigned to a single resource.
- Resource and customer both modified.

Account administrators control who can access the booking bulk editor by role permission:

- View and modify bookings in the bulk editor
- View, modify, and duplicate bookings in the bulk editor



Resource Booking Planner View Options and Settings

The following view options and settings are available for the resource booking planner:

- Sorting Options
- Filtering Data Using Column Filters
- Column Width and List-Grid Divider
- Other Settings

Sorting Options

You can sort the resource booking planner data by column using the sort icons in the column headers.

This feature supports ascending and descending sort orders and multi-level sorting up to three levels. The arrows in the column header indicate the sort order and sorting levels:

- Sorting levels are color-coded:

- White color arrow — Primary level
- Yellow color arrow — Secondary level
- Green color arrow— Tertiary level
- The colored arrow indicates the sort order for each sorting level:
  - Arrow pointing up — Ascending sort order
  - Arrow pointing down — Descending sort order

Click a column header to select that column as your primary sort field. Click the same column header again to change the sort order. If you click a different column header, this column becomes your primary sorting level, the previous primary level becomes the new secondary level and the previous secondary becomes the new tertiary level.

To reset the sort order to the default one, click the sort icon in the toolbar.

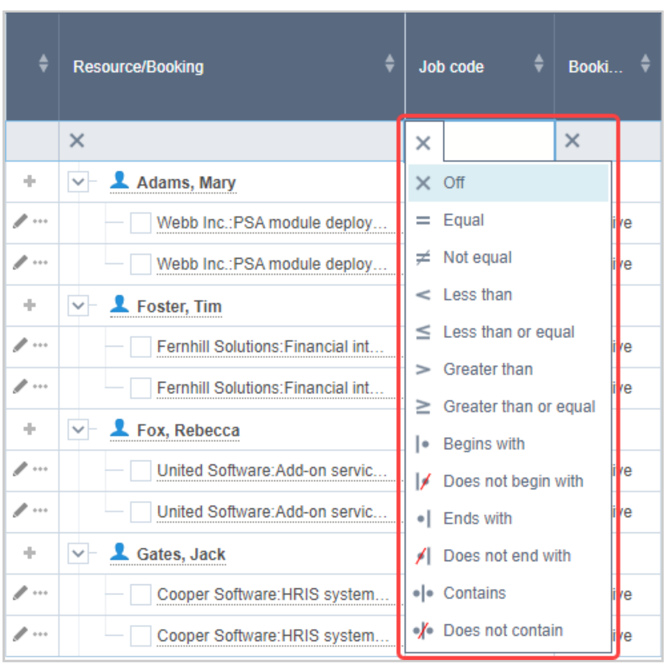
Filtering Data Using Column Filters

You can use column filters to show just the resources and bookings you need. For each column filter, you can specify a criteria by selecting an operator and entering a value. After you set column filters, the resource booking planner shows only the matching information.

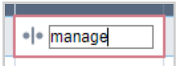
To filter data using column filters:

1. Click the icon in the filter cell under the column header. The icon may be different depending on the column filter currently applied.

   The operator dropdown list appears. It includes the following options: Off, Equal, Not equal, Less than, Less than or equal, Greater than, Greater than or equal, Begins with, Does not begin with, Ends with, Does not end with, Contains, Does not contain.

2. Select an operator for your filter criteria.
3. Click the space next to the operator, enter a value and press Enter.



The resource booking planner only the matching information.

Column Width and List-Grid Divider

You can change the width of columns on the left part of the resource booking planner by dragging the right border of each column.

You can move the divider between the list on the left and the grid on the right by dragging it to the desired size.

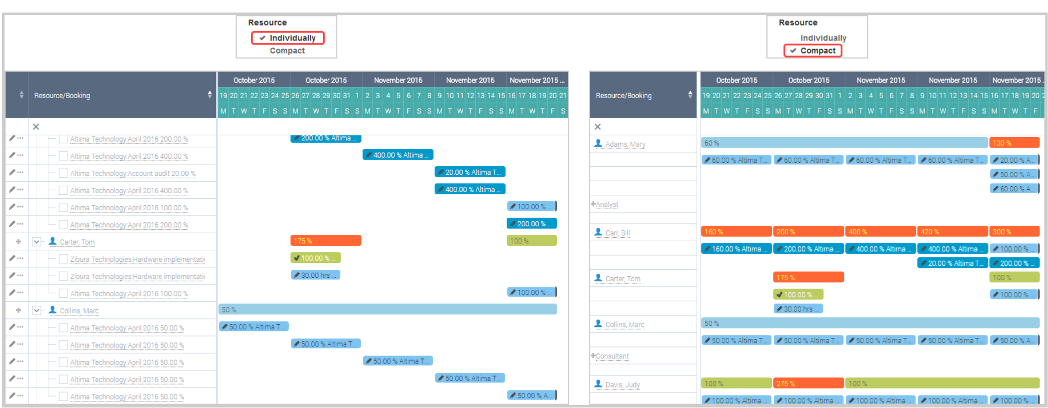
> **Note:** For very small date ranges, the width of the grid is set automatically and cannot be changed.

Other Settings

Click the settings icon to access the other resource booking planner settings.

- **Customize list view** — Select the columns to display on the left side of the resource booking planner view and specify the column order. The **Available** list shows all the columns you can add. The **Selected** list shows all the selected columns. Use the links to move items between the Available and Selected lists. Click a column in the **Selected** list and click the up and down arrow to change the position of this column.
- **Settings** — The resource booking planner settings form lets you control the color-coding of booking bars by booking type, the information shown on the booking bar labels booking bar, and the color-coding of utilization bars depending on resource availability. You can also opt to **Include active resources without bookings** and **Include inactive resources with bookings**, which are excluded by default.
- **Resources** — Click **Individually** to show each booking on a separate row. Click **Compact** to show all bookings on the same row.

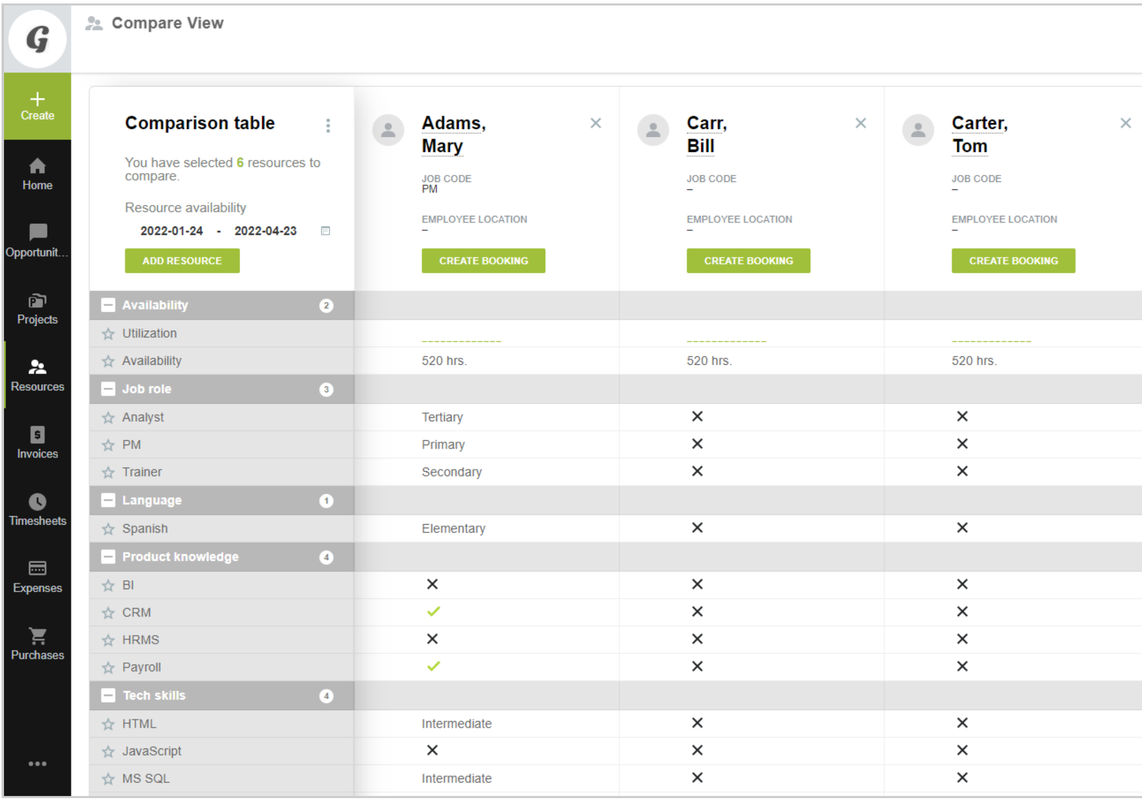
  If you choose the compact display option, the list on the left no longer shows booking information, and booking bars are grouped on one row except when there is a period overlap between bookings. Overlapping bookings show on multiple rows.



- **Bulk actions** — Click **Enabled** to show the bulk actions check boxes for each booking row. Click **Disabled** to hide the bulk actions check boxes.

Resource Compare View

The Resource Compare View allows you to compare resources at a glance and better manage large pools of resources. Add resources to the view, and then compare them side by side. You can select favorite skills and demographics, and create bookings from within the view.



To enable the Resource Compare View

1. Ensure that your account has access to the Resources module.
2. If the user is not an administrator, ensure that the user's role has the "Enable Resource Compare View" role permission.
3. To add resources to compare from a resource QuickView, ensure that QuickViews are enabled for the user.

There are three ways to add resources to the Resource Compare View within OpenAir.

To add resources to the Resource Compare View

- Point to any field which opens a resource QuickView, and click "Add to compare".
- In any list view which shows resources, the Resource Request Queue "Search and Propose" screen, or in Custom Search results, select the checkbox in the Bulk actions column next to each resource you want to compare, then click the "Bulk actions" or "Select..." dropdown list and click "Add to compare."

- In the Resource Compare View, click the “Add Resource” button.

As you add resources to compare, the counter on the left sidebar changes to indicate how many resources are in the Resource Compare View. Click this counter to open the “Resource Comparison” window, which shows the resources you will compare. To remove resources from this list (and from the Resource Compare View), click the ☒ icon next to the resource’s name.

> **Note:** The Resource Compare View has a default limit of 50 resources which can be compared at one time. To increase this limit, go to Administration > Application Settings > Resources > Resource compare view options and enter a new maximum value in the "Maximum number of resources to display in Resource Compare View" text field. This text field accepts any number values up to 200.

To open the Resource Compare View

There are two ways to navigate to the Resource Compare View:

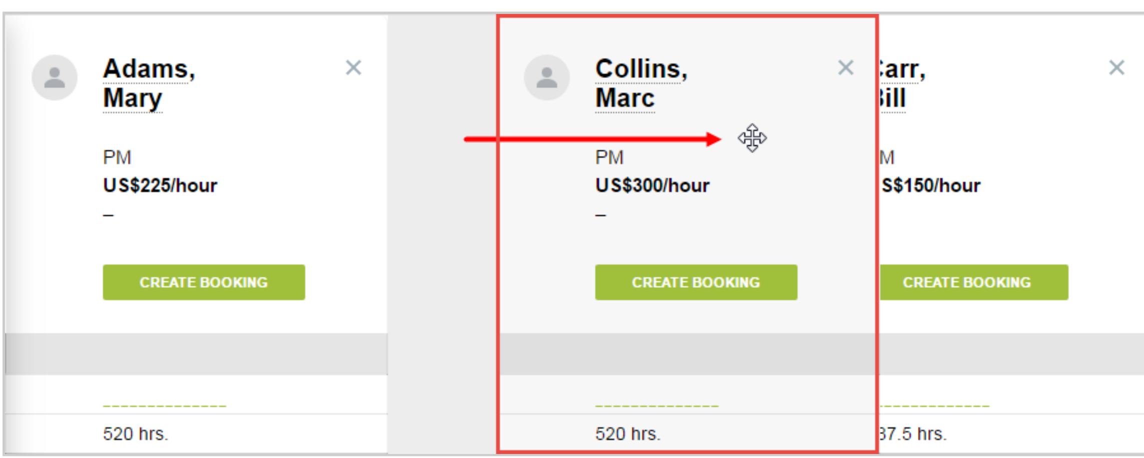
- Click the “Compare View” button in the “Resource comparison” window.
- Go to Resources > Compare view.

Using the Resource Compare View

While in the Resource Compare View, add resources to compare by clicking the "Add Resource" button and selecting them from a multi-select list. Left click on an un-selected resource name in the list, and they will be added to the Comparison table. Left click a selected resource to remove it from the comparison.

To filter resources based on their availability, click the icon next to the "Resource availability" field and enter or select start and end dates.

Compared resources are shown side-by-side in the Comparison table. Rearrange the resources in the Comparison table by dragging them to new positions on the table. To remove a resource from the Comparison table, click the ☒ icon in the top right corner of that resource's card. To remove all resource from the comparison, click the ⋮ icon and select "Remove all resources".



By default, resources' rates are hidden in the Resource Compare View. To display each resource's rates in the header of the resource cards, go to Administration > Application Settings > Resources > Resource compare view options and select the "Display employees’ rate" option under Header settings.

You can also set which three fields appear under each resource's name in the Resource Compare View header. Any user demographic or custom fields can be selected to appear in the heading. See Customizing Resource Compare View Headers.

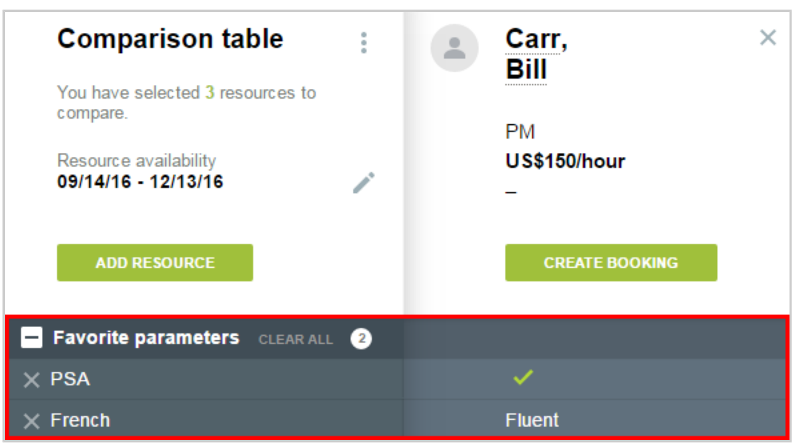
To hide skills categories such as Product knowledge or Tech skills, click the ⊟ icon near the category title. Click the ⊞ icon next to category title to expand that list of attributes. The numbers next to the category title indicate how many attributes are in that category.

Point to a Resource name in the header to open a QuickView window with details for the resource and links to perform resource-related actions.

As you scroll down the category skills category list, the resource name headers remain in view.

Setting favorite skills or attributes in the Resource Compare View

You can select favorite categories which are moved to their own “Favorite parameters” row near the top of the Comparison table. This category remains visible even if you add or remove resources from the table. To set a favorite skill or attribute, click the ☆ icon next to the skill or attribute.



The Demographics category in the Resource Compare View

The Demographics category includes standard fields, and can be further customized in Administration > Application Settings > Resources > Resource compare view options. Here you can choose to include or exclude custom fields and some standard fields. To enable this feature, add the "Modify Resource Compare View options" role permission to all roles which you want to access it.

Booking Resources from the Resource Compare View

To book a resource from the resource compare view:

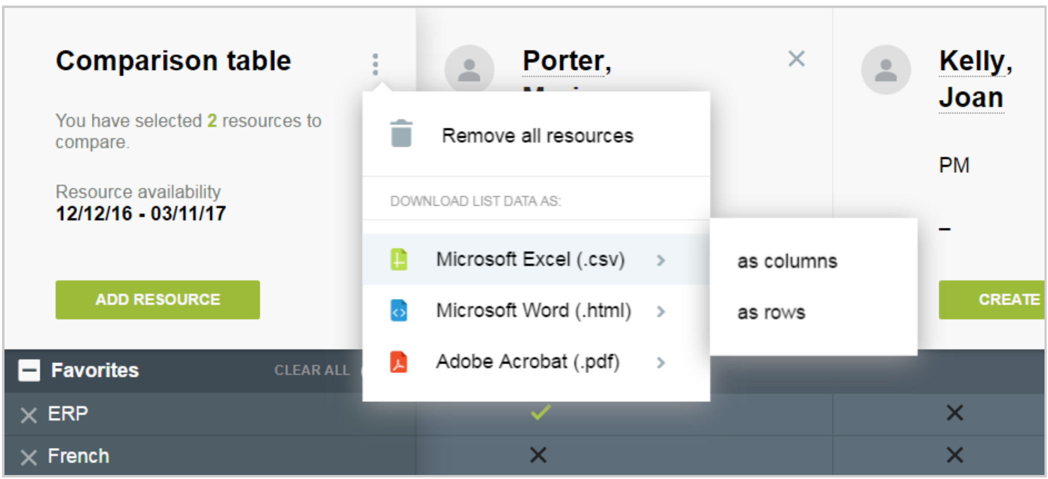
1. Click the "Create Booking" button in the Resource card header. A "New booking" form opens.
2. Enter the booking’s details in the “New booking” form.

> **Note:** When the New booking form first opens, the booking dates are based on the "Resource availability" dates set in the Comparison Tool, but can be changed when entering the booking information in the form.

Downloading Resource Compare View Data

You can download resource compare view data in a variety of formats.

1. Navigate to the Resource Compare View's Comparison table.
2. Click the ⋮ icon. A window opens with options to download the Resource Compare View's list data.
3. Point to the file format you would like to save the data as. A window opens where you can select to save the data as columns or rows.



- Click "as columns" to save resource data vertically in your downloaded file. This format most closely replicates the data as it appears in the Resource Compare View's Comparison table, with each column representing a resource.
- Click "as rows" to save resource data horizontally in your downloaded file. In this format, each row represents one resource.

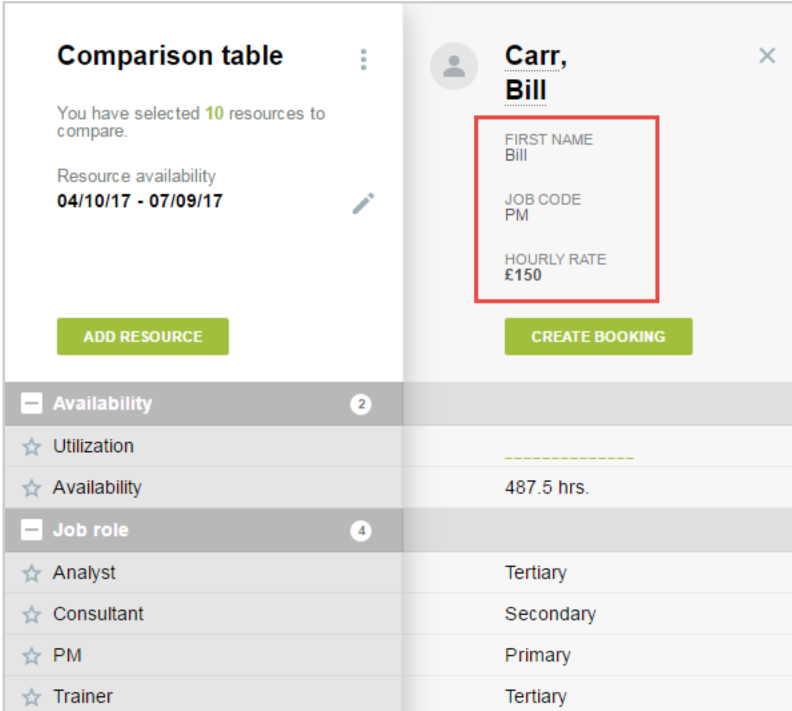
Filtering or Removing Inactive Resources from the Resource Compare View

To filter or remove Inactive resources from Resource Compare View selector:

1. Go to Administration > Application Settings > Resources > Resource Compare View Options and clear the **Include inactive resources** option.

Customizing Resource Compare View Headers

Set which three fields app ear under each resource's name in the Resource Compare View header. Any user demographic or custom fields can be selected to appear in the heading.



To select which fields appear in the Resource Compare View headers

1. Go to Administration > Application Settings > Resources > Resource compare view options.
2. Select the fields to display in the "Header settings" section of the Resource Compare View Options form.

Note: If you try to set more than three fields in the header, you will receive an error message.

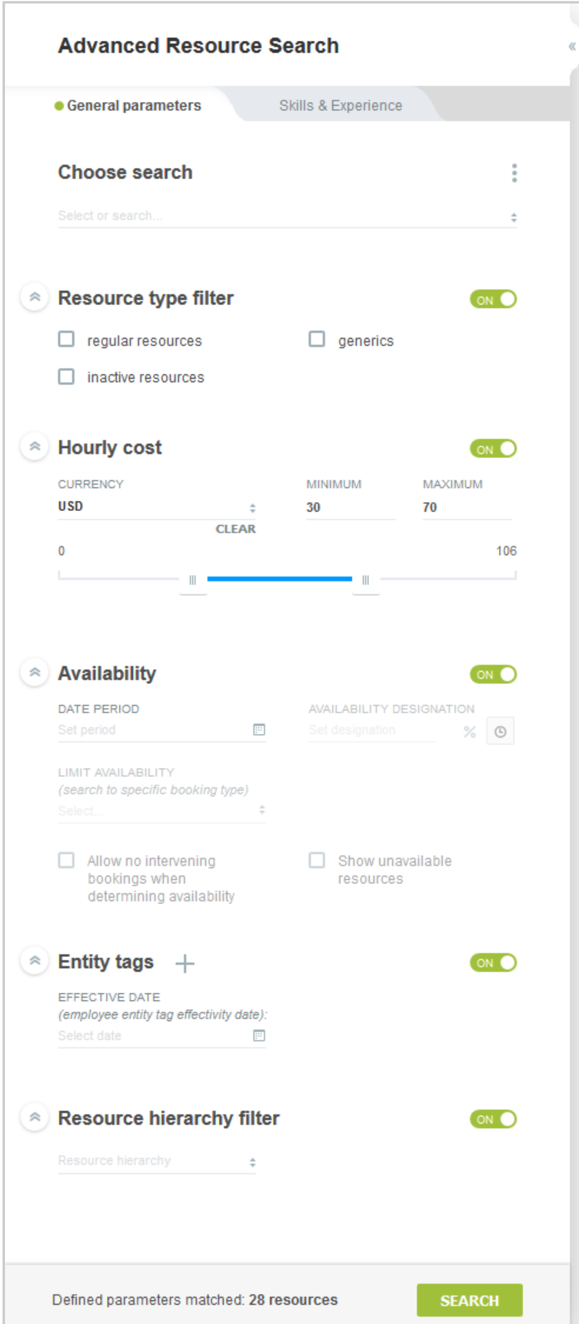
Advanced Resource Search

With Advanced Resource Search, enter the parameters, skills, and demographics you're looking for, and OpenAir does the rest. Search for availability, resource type, and entity tags. Mark parameters as "Required" and OpenAir will make sure that the search results will only return candidates with those skills.

Note: This feature is enabled by default, and all users with access to the Resources module can use it. To control access to this feature, contact OpenAir Customer Support to enable the **View Advanced Resource Search** role permission, which can be used to limit access to specific roles.

To search for a resource:

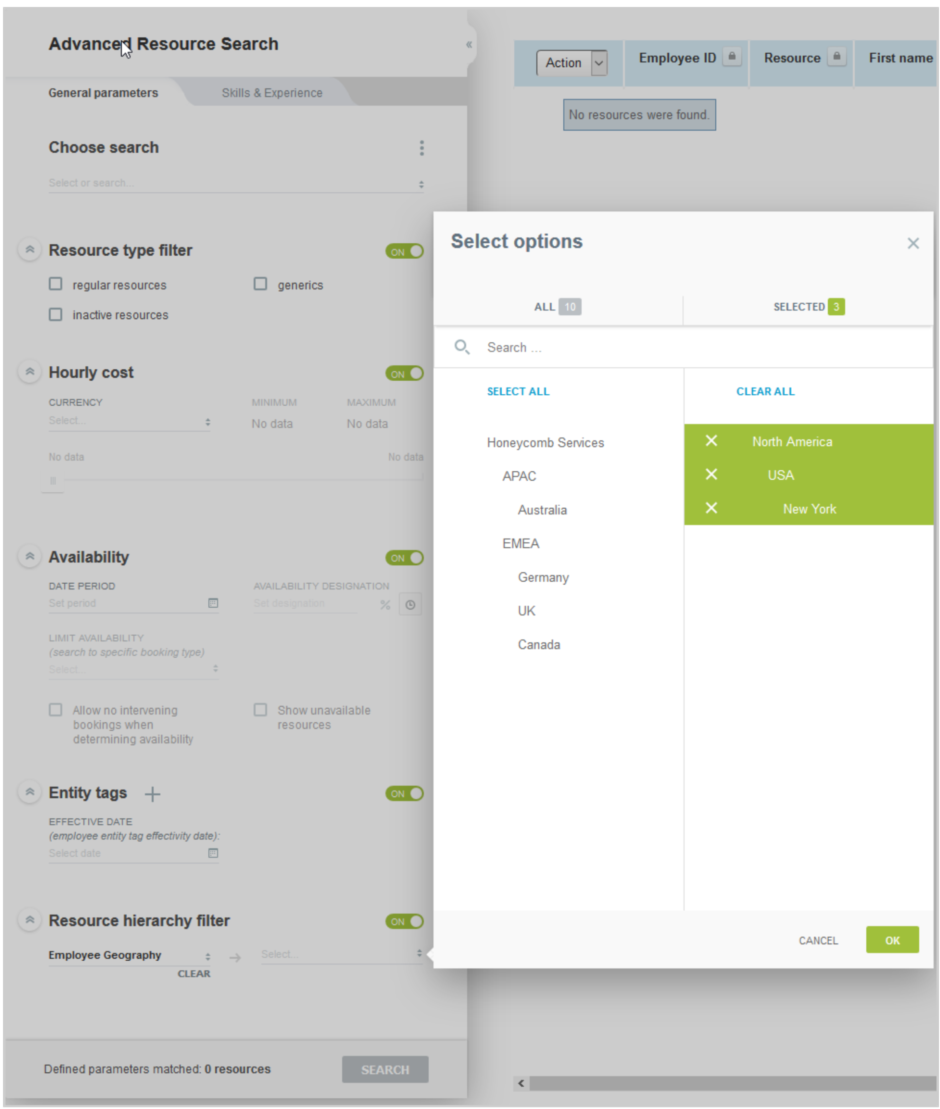
1. Go to Resources > Search > Advanced Resource Search.
2. Enter the General search parameters in the **General parameters** tab.



- **Resource type filter** – filter the types of resources which are included in the search. If no options are selected, Advanced Resource Search will search for all resource types. If you select an option (for example, “regular resources”), Advanced Resource Search will only search for the selected type of resource. Click the toggle button next to the **Resource type filter** heading to disable filtering by Resource type.
- **Hourly cost** – define the hourly cost range for the resources. Select a **Currency** and define a **Minimum** and **Maximum** hourly costs either by typing the figures in or using the sliders underneath. The hourly cost search parameters are empty by default. Once the **Currency** is set, the **Minimum** and **Maximum** values are automatically set to the minimum and maximum hourly cost values in the account. The number of matches is recalculated automatically

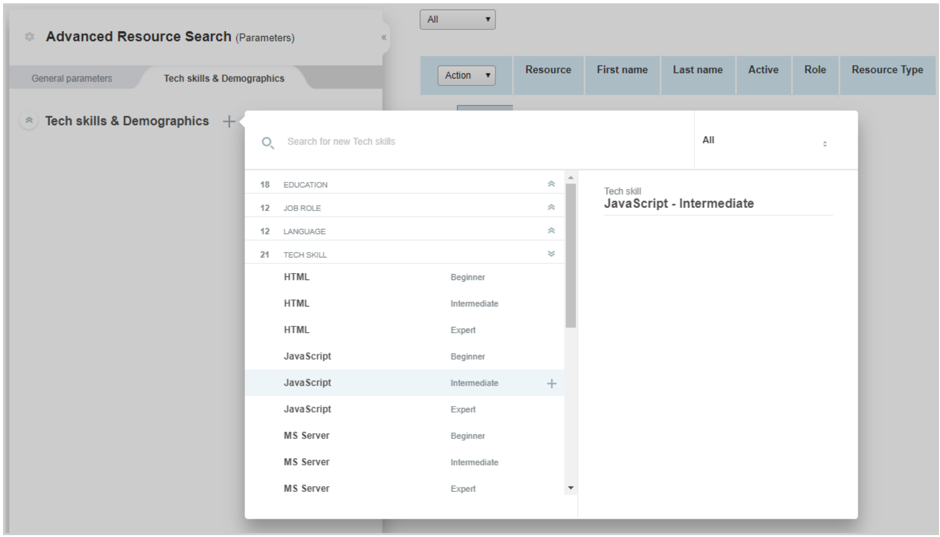
whenever the range is changed. The hourly cost criterion is defined in terms of primary loaded cost. Only users with the **View primary loaded costs** role permission can view and use this search parameter. Click the toggle button next to the **Hourly cost** heading to disable searching by hourly cost.

- **Availability** – you can set the **Date period** for when you will need the resources, their availability by percentage or hours, or limit their availability to specific booking types. Select the **Allow no intervening bookings when determining availability** option to prevent Advanced Resource Search from including resources with existing bookings which conflict with your search period from being included in the results. Click the toggle button next to the **Availability** heading to disable searching by ability.
- **Entity tags** – set search criteria for Entity tags here. Click the toggle button next to the **Entity tags** heading to disable searching by Entity tags.
- **Resource hierarchy filter** – Advanced Resource Search supports hierarchies when searching. Click the toggle button next to the **Resource hierarchy filter** heading to disable filtering by Resource type.

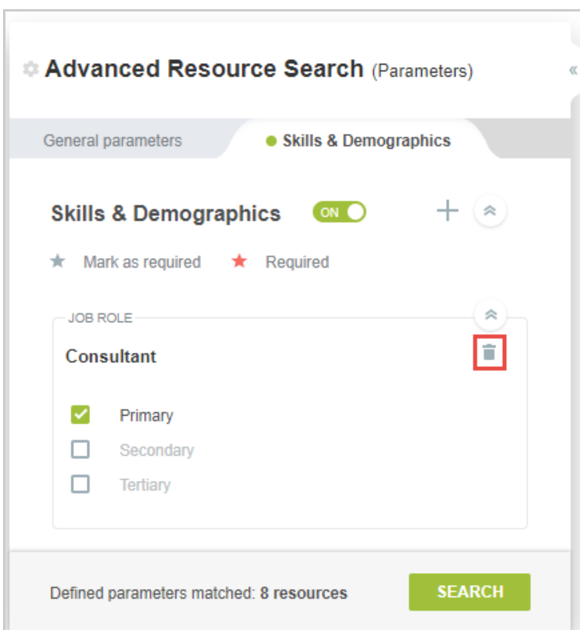


3. Enter the Skills you would like the resources to have in the **Skills & Demographics** tab.

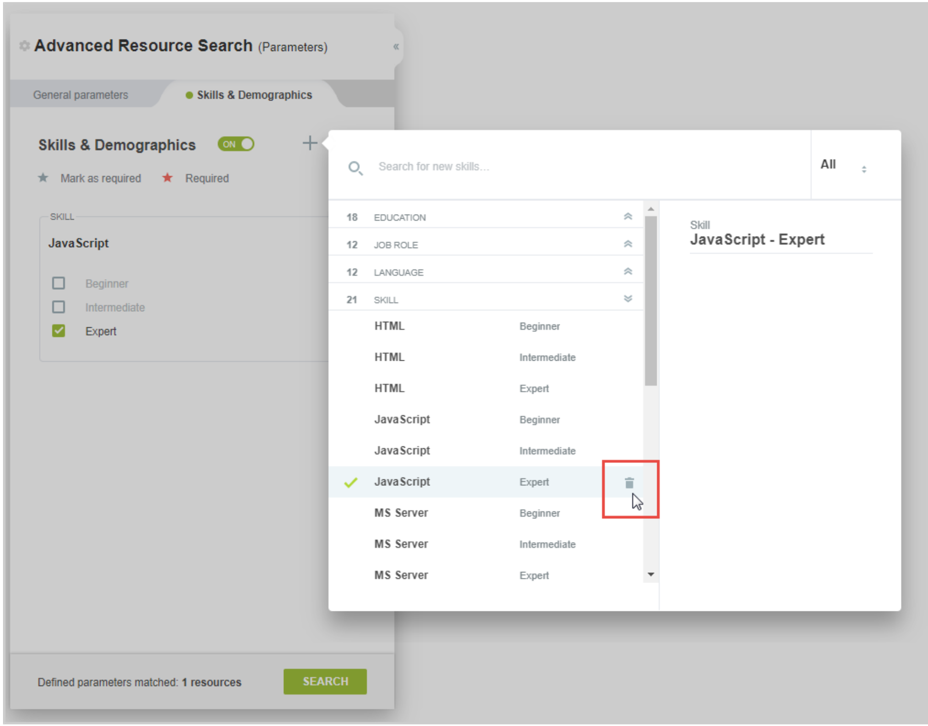
- To add a skill to the search, first click the Add new **Skills / Demographics** icon. Then select a skill category and click the icon next to the skill you want to add to the search.



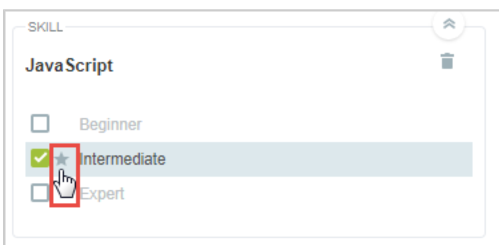
- To delete a skill from the search, click the **Delete** icon to the right of the skill name in the **Advanced Resource Search Parameters**.



Alternatively, you can delete a skill from the search by clicking the **Add new Skills / Demographics** icon selecting the skill category of the skill to delete, and clicking the **Remove Skill** icon next to the skill you want to remove from the search.



- To mark a skill as required, point to the skill and click the **Required** icon. The search will only return resources who have this skill.



Note: Some skills may have multiple levels of expertise or knowledge assigned to them (for example, JavaScript might have a Beginner, Intermediate, and Expert level of knowledge). Advanced Resource Search searches for each of these skill levels differently depending on how your skill profiles are set up.

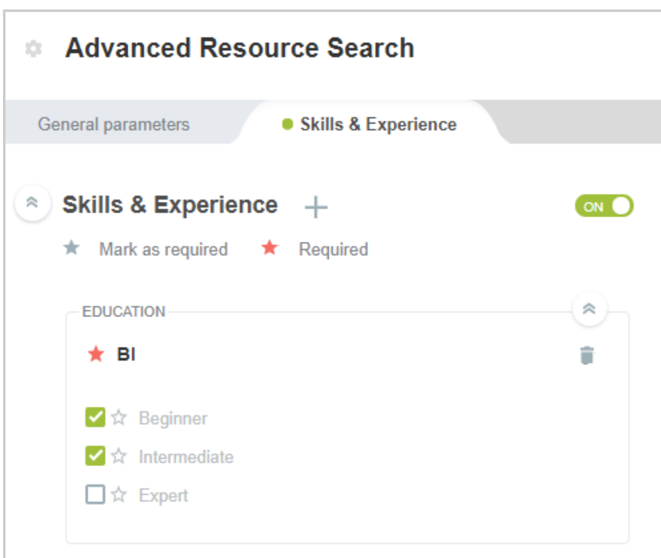
For example, if you only allow a user to have only one level for JavaScript, and mark “Intermediate” JavaScript as required, Advanced Resource Search will return users with the “Intermediate” skill levels.

If no skills are marked as required, and you select “Intermediate” and “Advanced” JavaScript, Advanced Resource Search will return candidates with either of these skills. Resources without “Intermediate” or "Advanced" JavaScript will also appear, but will be ranked lower.

You can also search for resources with any level of required skills by marking a skill as required when looking for resources in Advanced Resource Search, and then selecting which skill levels you want to search for. When a skill is marked as Required, Advanced Resource Search will return candidates who possess any of the levels for this skill which you selected.

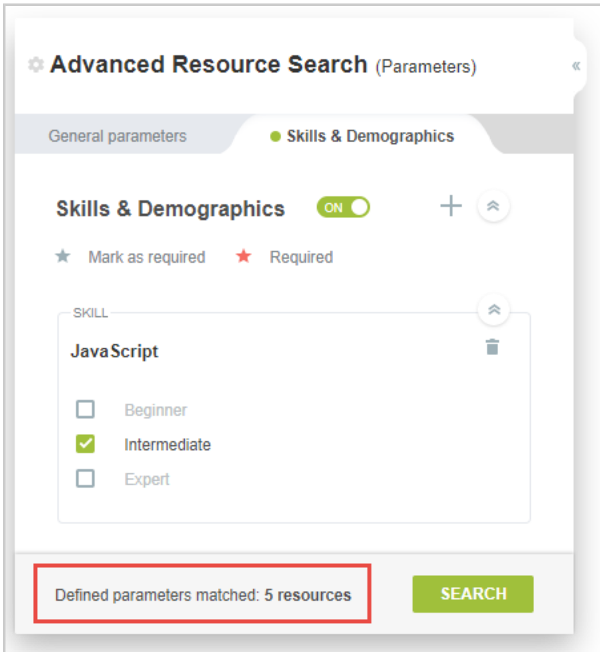
To set whether a skill or skill level is required or not in Advanced Resource Search:

1. Click the star icon next to the skill name. A red star icon indicates the skill is required, while a clear star icon indicates it is not required.
2. Select the skill levels you want to search for.



When you run the search, Advanced Resource Search will return resources who have either of the skill levels you selected. For example, if you select the BI skill, and also select the Beginner and Intermediate levels for BI, Advanced Resource Search will return resources who have either Beginner BI experience or Intermediate BI experience.

- As you enter search criteria, the **Defined parameters matched** field updates to indicate how many resources your search will return.



4. Click **Search** to get the list of resources which match your search criteria.

You can also save searches in Advanced Resource Search.

To save a search in Advanced Resource Search:

1. Click the **Menu** ⋮ icon in the **General parameters** tab.
2. Click **Save search settings**.
3. Name the search (required) and provide a description for it (optional).
4. Click **Save**.

To copy a search and save the copy in Advanced Resource Search:

1. Click the **Menu** ⋮ icon in the **General parameters** tab.
2. Click **Copy and save**.
3. Name the copy of the search (required) and provide a description for it (optional).
4. Click **Save**.

To delete a saved search in Advanced Resource Search:

1. Click the **Menu** ⋮ icon in the **General parameters** tab.
2. Click **Delete**.

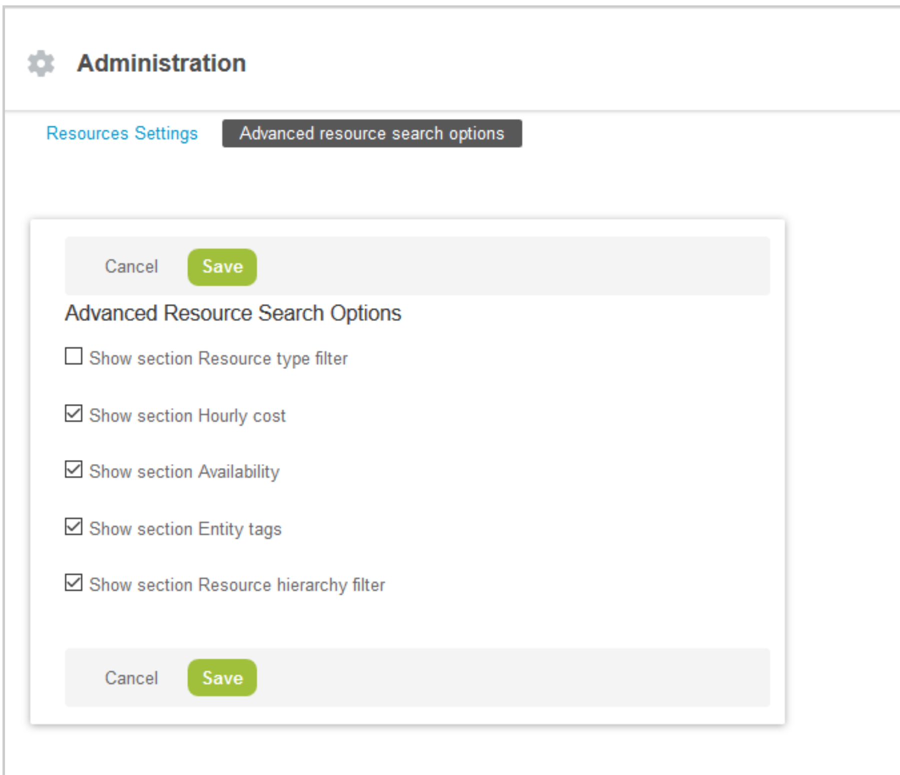
3. Click **OK** to confirm the deletion.

Users with the Modify Advanced Resource Search options role permission can customize the Advanced Resource Search form to show or hide any of the general search parameters.

To show or hide sections in the general search parameters tab

1. Go to Administration > Application Settings > Resources > Advanced resource search options.
2. Select the section you want to show in the Advanced Resource search and leave the sections you want to hide unchecked.
3. Click **Save**.

Note: The Skills & Experience parameter section is always shown.



Resource Demand Request (RDR)

The Resource Demand Request (RDR) optional feature lets you find and assign resources with specific sets of skills to your projects. To use the feature, first create a resource request, which acts as a folder for individual resource request queues. Resource request queues are searches for resources with specific characteristics, such as language proficiency, product knowledge, or job roles. You can then book resources from your resource requests, and download the information for later use. For more information, see the following help topics:

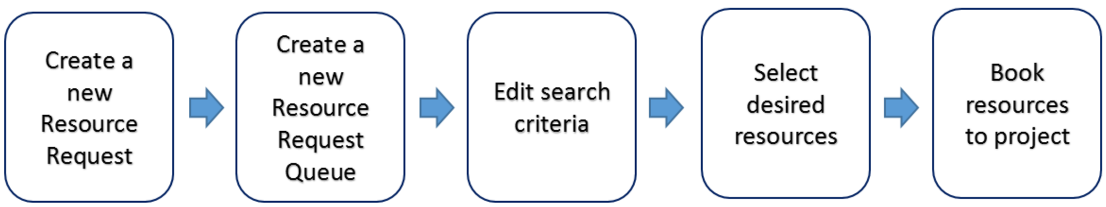
- Creating a Resource Request

- Creating and Editing a Resource Request Queue
- Exporting Resource Demand Request (RDR) Search Results
- Deleting a Resource Request or Resource Request Queue

Note: Resource request records support custom fields — See Custom Fields. Custom fields associated with resource requests are automatically visible in the resource request queues list view and available for the resource request queues detail report.

To enable this feature, contact OpenAir Customer Support.

Resource Demand Request (RDR) Recommended Workflow



Creating a Resource Request

Resource requests act as a folder for detailed resource searches, or resource request queues. Every resource request queue must be in a resource request.

To Create a resource request:

1. Go to Resources > Resource requests.
2. Click the Create button.

   The Create menu appears.
3. Under **Resource request**, do one of the following:
   - To create a resource request only, click **New …**.

     The New resource request form appears. After you enter all information and save the form, the Resource Request Queue appears.
   - To create a resource request and add a resource request queue to the new resource request record, click **New, quick …**.

     The New quick resource request form appears
4. Enter all required information (indicated by an asterisk). The fields included on the form depends on the option you chose in the previous step.

   Both forms include the following fields:
   - **Name** (Required) — Give the request a name.
   - **Resource request number** — Automatically filled in with the next number in sequence, based on the last resource request. You can also enter your own resource request number.
   - **Default Customer : Project** (Required)— Select the customer and project for which this request is used by default. If the customer and project you want are not present in the

dropdown list, select **Find more...** or click the search icon to search for a customer or project by name.

- **Expected start date** — Enter the expected start date for the resources to start work. Click the Calendar icon to open a calendar to choose the date.
- **Duration** — Enter the duration which the resource will work on the project. In the first dropdown, select a number between 1 and 31, and in the second dropdown, select either Days, Weeks, Months, Quarters, or Years.
- **Start date** — Enter the start date for the resource's assignment.
- **End date** — Enter the end date for the resource's assignment.

> **Note:** You can specify either:
>
> - The **Expected start date** and a **Duration**
> - The **Start date** and a **End date**
>
> Both field pairs are mutually exclusive. Entering the **Expected start date** and a **Duration** hides the **Start date** and a **End date** fields, and vice versa.

- **Booking type** (Required) — Select either Confirmed, Open, Pending, Rejected, or Tentative. When this field is displayed in a resource request queue, its value is read-only and based on the setting from the associated resource request.
- **Notes** — Enter any notes for the resource request.
- **Attachments** — Add any file attachments here. Attachments can include documents such as résumés, statements of work, etc.

The New quick resource request form includes additional fields to create a resource request queue with the resource request. See Creating and Editing a Resource Request Queue.

5. Click **Save**.

   After you enter all information and save the New resource request form, the New resource request queue form appears. See Creating and Editing a Resource Request Queue.

   After you enter all information and save the New quick resource request form, the resource request record appears.

Creating and Editing a Resource Request Queue

After you create a resource request, you can add resource request queues to your resource request. Resource request queues are searches for resources with specific characteristics, such as language proficiency, product knowledge, or job roles.

To create and edit a resource request queue:

1. Go to Resources > Resource Requests > [*Select a resource request*] > resource request queues.
2. Do one of the following:
   - Click the Create button, then **New ...** under **Resource request queue**
   - Copy an existing resource request queue by clicking the copy icon in the Action column on the resource request queue list view.

   The Resource request queue form appears.

Note: You can also:

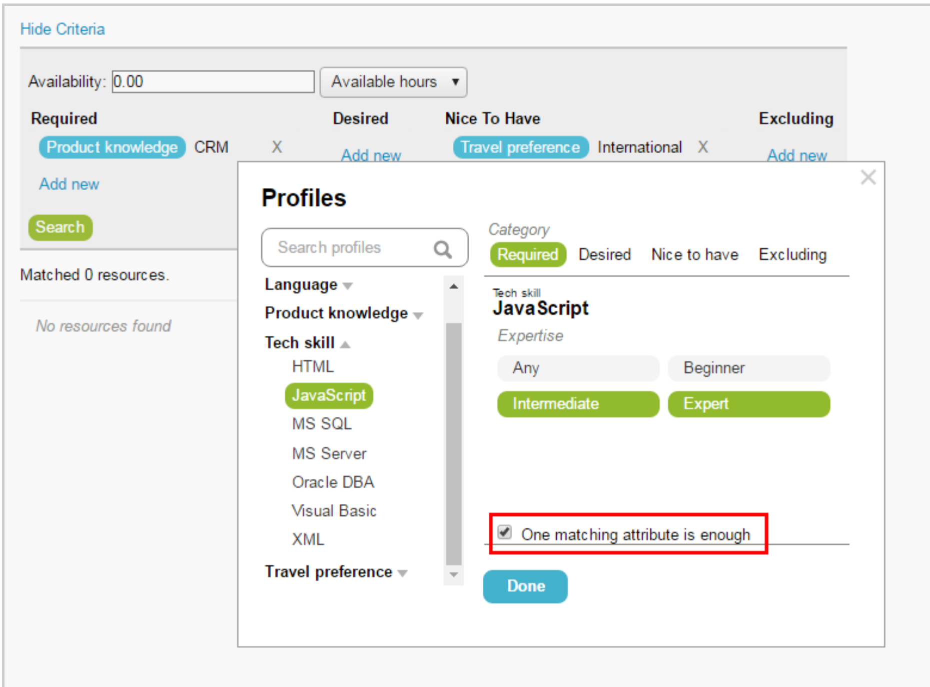
- Create a resource request when creating a resource request queue. See Creating a Resource Request.
- Select and duplicate multiple resource request queues using the list view bulk actions functionality.

3. Enter all required information (indicated by an asterisk).
   - **Name** — Assign a name to the resource request queue.
   - **Resource request queue number** — Automatically filled in with the next number in sequence, based on the last resource request queue. You can also enter your own resource request queue number.
   - **Customer : Project** (Required)— Select the Customer and Project which this request queue is used for. If the customer and project you want are not present in the dropdown list, select **Find more...** or click the search icon to search for a customer or project by name.
   - **Resource request queue status** — Select either Open, Partial, Complete, or Cancelled.
   - **Resource request requester** — This field is automatically populated with the person creating the request.
   - **Resource request queue quantity** — Enter how many resources you need who have the desired skills or experience.
   - Enter a **Start date** and **End date** for the bookings.
   - **Notes** — Enter any notes for the resource request queue.
   - **Select type of resources to include in search** — Select whether to include regular resources (which are actual, active people), generics (which are placeholder roles), or inactive resources (which are people who aren't active and cannot enter time, etc. to any project). You can also select to allow no intervening bookings when determining availability.
   - **Availability** — Select whether the queue factors in percentage of time or number of hours when determining availability. Click > Create next to Limit availability search to specific booking types to limit the search to Confirmed, Open, Pending, Rejected, or Tentative availability.
   - **Base Criteria** — Select the criteria used in the resource request queue. There are four different categories to which you can assign searchable skills and experience. Click **Add new** in any of the base criteria fields to open a window and select Job roles, Languages, Product knowledge, Tech skills, or Travel preferences.
     - **Required** — A resource must have these features to be included in the resource request queue.
     - **Desired** — A resource with these characteristics is ranked higher in the search results, but these characteristics are not required to be included in the queue.
     - **Nice To Have** — A resource with these characteristics is ranked lower than those with desired characteristics, but higher than a resource without them. These characteristics aren't required to be included in the queue.
     - **Excluding** — A resource with these characteristics will be excluded from the queue.

     Check the **One matching attribute is enough** box to include resources who have any of the selected attributes, rather than all of the selected attributes. This feature is particularly useful when searching for employees with a minimum level of expertise or better.

Note: When the **One matching attribute is enough** box is checked, employees with only one matching attribute are treated as a 100% match.

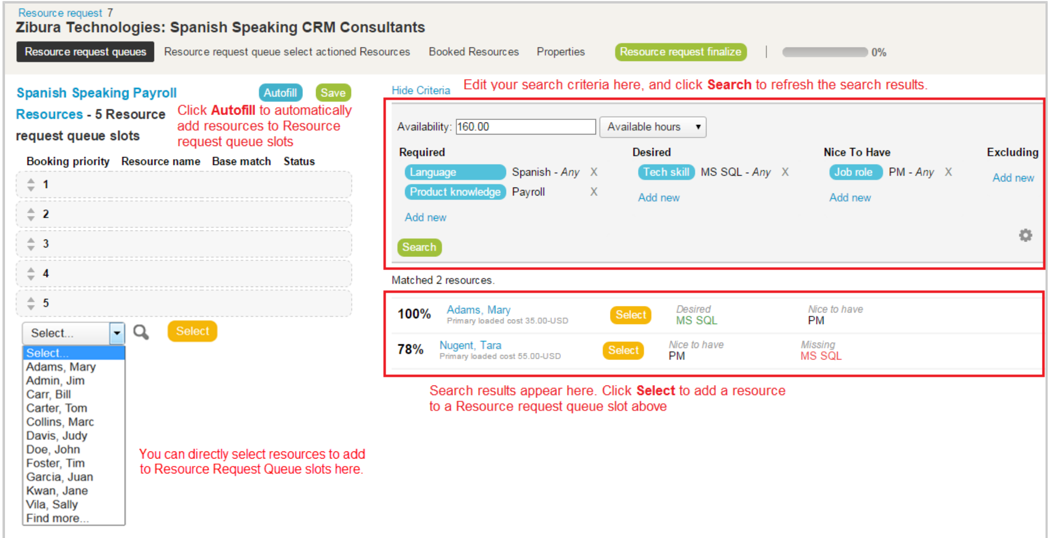
To use this feature, first go to Administration > Application Settings > Resources and clear the **Allow duplicates per resource** box for each profile type. The **One matching attribute is enough** box is not available on the resource request queues base criteria popup window if the **Allow duplicates per resource** box is checked for the profile type.



- **Attachments** — Add any file attachments here. Attachments can include documents such as résumés, statements of work, etc.

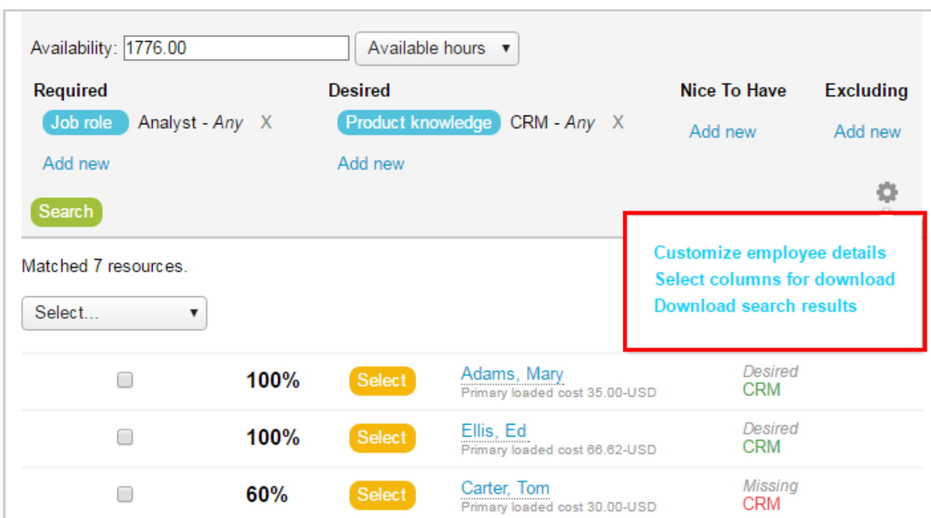
4. Click **Search and Resource request queue select action** to run the resource search and display the resource request queue.

   The resource request queue record is saved and the Search and Propose page appears.



5. Use the Search and Propose page to select resources and book them tentatively. The page shows the base criteria you selected previously and lists matching resources, with additional information such as a matching score, cost information and the search criteria they match.

   - Click the settings icon, then **Customize employee details** to customize the list and select the information shown on the list. You can also download the search results a HTML, CSV or PDF file, and select which information to include in the download file.



   - Edit your search criteria, if required and click **Search** to find matching resources.
   - Add matching resources to the Resource Comparison tool using the dropdown field above the matching resources list. See Resource Compare View.
   - Click **Select** in the matching resources list to add a resource to a resource request queue slot.
   - Click **Autofill** to add matching resources to resource request queue slots automatically.
   - Add any resources directly to resource request queue slots using the dropdown field under the resource request queue slots.
   - Click the arrows under Booking priority to change the booking priority of the resource request queue slots.

Note: An optional feature replaces the booking priority ranking with a simpler method which lets you mark favorite resources without ranking them.

- If the feature is enabled for your account, click the star to mark or clear a resource as favorite in the resource request queue slots.

- To enable this optional feature, contact OpenAir Customer Support and request the following setting: **Use recommendations instead of ranking for resource request queue prioritization**.

6. Click **Save** to add the selected resources to the queue and return to the resource request queue properties form. The Resources section of the form shows the resource request queue slots you selected, with utilization forecast information. The selected resources are added to the **Resource request queue select actioned resources** sublist in the resource request record.
7. Click **Book** to book these resources tentatively to the project. A confirmation screen will ask you to confirm the bookings. The bookings will be listed in the **Booked Resources** sublist after the bookings are confirmed.

Note: Booked resources still need to be approved. Click **Resource request finalize** in the resource request record header to finalize the resource request and approve all bookings.

You can use the Resource Request Queues Require Base Criteria and Availability feature to prevent resource request being finalized if the availability hours or percentage is set to 0. To enable this feature, contact OpenAir Customer Support.

Users with the **Allow change of booking type on finalized Resource request** role permission can edit the booking type field in resource demand requests even after the resource request was submitted to a resource manager. This feature requires the **Enable a booking type to exist in all approval statuses** account setting. In addition, any bookings created after submission will retain the booking type which was set at the time the bookings were created, even if the booking type is later changed in the Resource Demand Request.

Exporting Resource Demand Request (RDR) Search Results

Resource demand request queue search results can be exported as PDF, CSV, or HTML files.

Export Resource Demand Request Search Results

1. Go to the resource request queue search results which you would like to export.
2. In the search results, click the settings icon. A dialog appears.
3. Click Download search results in the dialog.
4. Click the Click here link next to the file format you would like to export your results as. A dialog appears asking if you would like to open or save the file. You can choose the program to open the file, or download the file to a location of your choice.

Deleting a Resource Request or Resource Request Queue

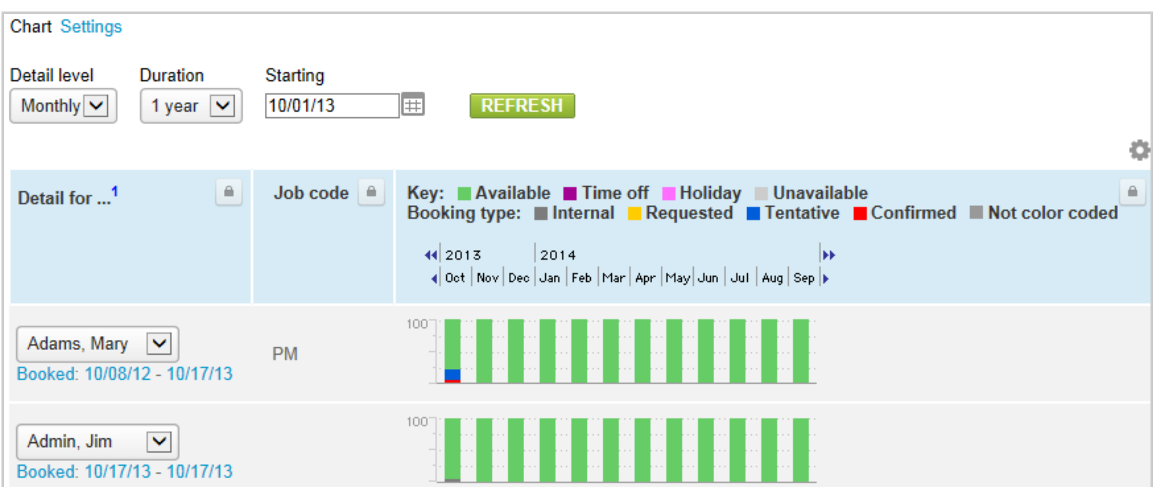
You can delete resource request queues and resources requests with no resource request queues.

Delete a Resource Request or Resource Request Queue

1. Go to Resources > Resource requests or Resources > Resource request queues to open the list view for Resource Requests or Resource Request Queues.
2. Ensure that you have the **Run an action** column displayed on the list. If it isn't displayed, click the settings icon, click **Customize list view**, click **Run an action** from the Available column in the List layout picker, and click **Add selected >**. Then click **OK**.
3. Check the Run an action box next to the resource request or resource request queue which you would like to delete.
4. Click the Run an action icon at the top of the Run an action column.
5. Select **Delete the selected resource requests** or **Delete the selected resource request queues** and click **OK**.

Note: You cannot delete a resource request that has any resource request queues within it.

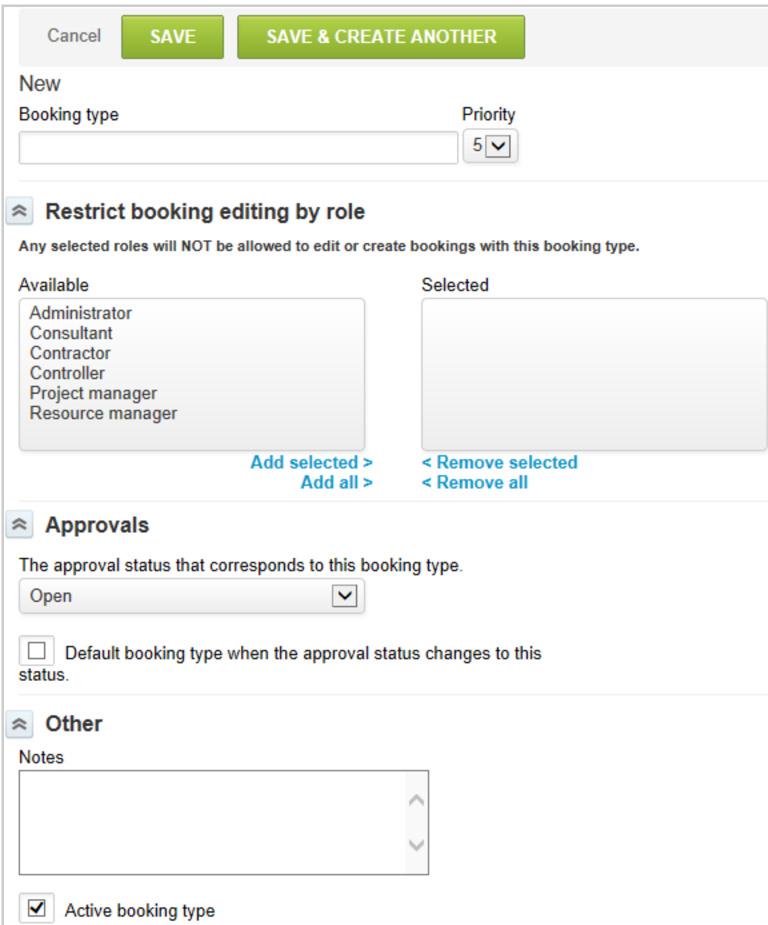
Booking Chart



The Booking chart lets you see booking data in a visual chart and is the recommended way to get an overview of bookings for one or more employees. This view can be customized to show booking data according to different attributes. To update a booking from the chart view, click on a day/bar on the chart and the booking is opened up in the List view.

Note: Information about bookings displayed in this view can be added as hover over information. Contact OpenAir Customer Support for assistance.

Booking Types



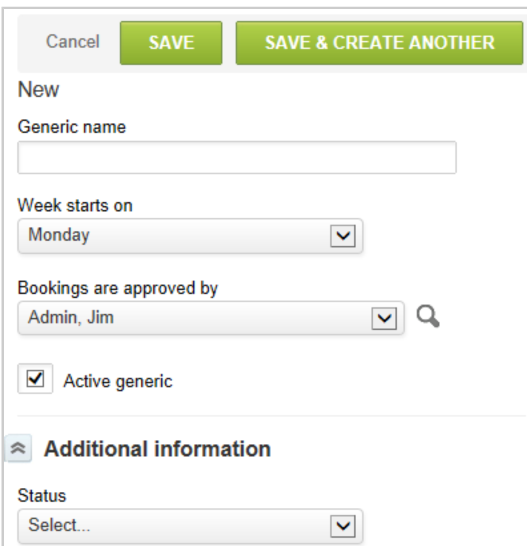
Booking Types provides you with the ability to group bookings or booking requests into distinct classifications. For example, a Hard booking type may indicate that the contract has been signed and a resource is needed for a specific time frame. While a Soft booking type can indicate that the contract has not been signed and the need is tentative. You can create booking types based on your company's needs and terminology. We recommend that you use booking types that align with a pipeline maturity or project lifecycle since updates are consistent with the state of the project or opportunity. For example, a proposed project with Soft bookings is signed and all bookings should be converted to Hard bookings. This requires a manual update. If you do not have the resources to maintain this data, then you may want to avoid using booking types.

To create a Booking Type:

OpenAir

1. Go to Administration > Application Settings > Resources > Booking types.
2. Select **New Booking type** from the **Create Button**.
3. Enter the Booking type name and priority, if needed. Priority may be displayed on booking reports to identify a level of priority.
4. **Restrict booking editing by role** — To restrict the ability to edit or create bookings of this booking type, select the roles from the Available column and click **Add selected**. Users with the Selected roles will not be able to edit or create bookings of this booking type. Bookings of this booking type will not show in the Advanced Booking Worksheet for these users.
5. Add Notes to describe the use of booking types in your company's OpenAir environment. Booking types can be inactivated or reactivated at any time.
6. Click Save.

Generics



Generic records are virtual or placeholder employee resources that represent a staffing need. Many times, generic resources align with job codes defined in the company since job codes tend to align with skills.

After you have defined generic records, you can use them in bookings or booking requests within the Resources application. A generic record can also be used for booked utilization forecasting or as assigned resources on projects and tasks for assigned utilization. If booking requests have been enabled in your environment, there is a switch that can be enabled to require a requestor to ask for a generic resource instead of a specifically named resource. See Resources Other Settings.

If a project is being planned or has started, the project manager may need to assign a resource to project tasks to develop a full resource plan. Generics may be used if the project manager or requestor knows the type of resource but not the specific individual. Generic resources cannot record time or expenses and can only be used in a forecast capacity.

To create a Generic resource:

1. Go to Administration > Application Settings > Resources > Generics.

2. Select **New Generic** from the **Create Button**.
3. Enter a name for the generic.
4. The drop-down list selection for **Week starts on** defaults to the day designated in Resources Other Settings.
5. In the **Booking are approved by** drop-down list, choose the specific person or approval process (suggested) who can approve booking request assigned to generics. Generics can be inactivated or reactivated at any time.
6. Enter other employee-related information as needed.
7. Click Save.

After you save the Generic form definition, additional links display in a way that is similar to the employee definition process on the Employee Demographic form.

- A schedule link displays to allow association of the generic to a defined work schedule.
- Exceptions to the generics schedule may also be entered, although this is not used often for generics.
- The job code that aligns with the generic may also be defined. Since job codes may change in your company, OpenAir provides a historical tracking feature if the generic should change to be associated with another job code. You can set the previous job code setting to a defined date range and set the new job code as the current value.
- The cost of the Generic may be defined. If the generic aligns with your job codes, the cost would be best set to the average cost of your employees with the same job code.
- If employee entity tags are activated and defined in your account for the employee record, the same tags are available for definition on the Generic record.

Generics are not real employees, and do not have OpenAir log ins. As such, they cannot enter time or expenses and do not allow for Target Utilization, Filter Set, Proxy, or other typical employee configurations.

Resource Profile

Resource Profile Options

Active	Profile type	Terminology	Do not pluralize	Preserve case	Attribute set	Related Profile	Limit to one per resource	Allow duplicates per resource	Show only in use attributes	Notify employees when new types created
☑	Skill	Tech skill	☐	☐	Expertise	Select...	[No]	☐	☐	☐
☑	Education	Product knowledge	☑	☐	Select...	Select...	[No]	☐	☐	☐
☐	Location	Location	☐	☐	Select...	Select...	☐	☐	☐	☐
☑	Jobrole	Job role	☑	☐	Level	Select...	[No]	☐	☐	☐
☐	Industry	Industry	☐	☐	Expertise	Select...	☐	☐	☐	☐

The Resource Profile Options form provides the foundation for relating all Resource Profile elements together to define a complete skill database. Each row controls a dimension of the resource profile.

To access the Resource Profile Options form:

1. Go to Administration > Application Settings > Resources > Resource profiles.
2. For each dimension or row, check the **Active** check box to include the item as a dimension of the resource profile. When active, it displays in the Resources Settings list. You see the standard profile

type names from OpenAir listed here such as Skill, Education, Location, Job role, and Industry. You may override the standard terminology or define a custom term for any of the other 35 custom profile elements.

> **Note:** To create new profile types, go to Administration > Resources Settings and click on the profile type link. See Tech Skills, Education, Locations, Job Roles, and Industries.

3. Profile types become plural on forms by default unless you select the check box: **Do not to pluralize**.
4. OpenAir also converts two word combinations into a capitalized first word and lowercase second word unless you select the following check box: **Preserve case**. The Terminology override displays exactly as you entered it in the Terminology text box.
5. Optionally, you may associate Attribute Sets with individual Resource Profile elements by selecting the desired attribute set. Attribute sets only display if they are defined prior to accessing this form. See Attribute Sets.
6. If Resource Profile dimensions are related, identify the related profile element by selecting it from the Related Profile drop-down list. Related resource elements are only useful in reporting. Each resource profile element by default permits multiple selections by the employees in the category.
7. You may choose to limit a resource profile element to only allow one entry. This is dependent on the definition of the resource profile element. An example would be identifying a highest education level entry by only allowing the employee to select one value. To all duplicates per resource, select the check box: **Limit to one per resource**.
8. By default, OpenAir lets employees select unique values from the available values of a resource profile. You may opt to allow employees to select duplicate values that are differentiated by an attribute set. If you do this, you must select the following check box: **Allow duplicates per resource**.
9. The last 2 checkbox options on the form ensure consistency of data and awareness:
   - **Show only in use attributes —** ensures only active attribute set values display when information is entered in the Resource application.
   - **Notify employees when new types created —** ensures employees are notified of a new Resource Profile value. This could be helpful if you open a new office location or create a new Skill profile.
10. Click Save.

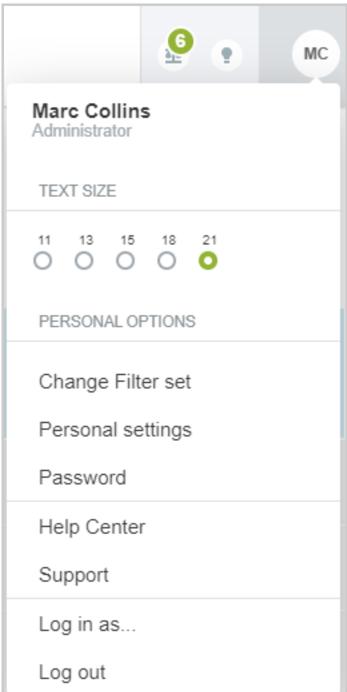
Consolidated Resource Profiles

Use consolidated resource profiles to see what skills and experience your resources have at a glance. It is also easy to update your resources' skills - essential for assigning the right resource to the right task and keeping them engaged, motivated, and increasing revenue.

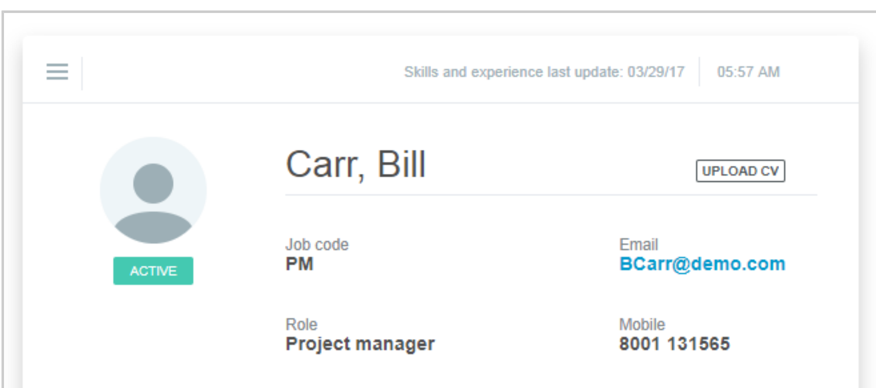
The consolidated resource profile contains a header with customizable information such as the resource's email address, manager, location, or any user custom field arranged in four columns. There is no limit to the number of fields which can be shown in the header.

To open a Consolidated Resource Profile, go to Resources > Resources > [choose a resource] > Profile.

Note: To enable this feature, contact OpenAir Customer Support and request the Consolidated Resource Profiles feature. Resources with the "View my own profile" role permission can see their information but cannot edit their demographics or custom fields. Resources with the "View and modify my own profile" role permission can also update their skills and experiences, but not the demographics. Users with either role will see a "My profile" link in the User Center which opens the Consolidated Resource Profile.

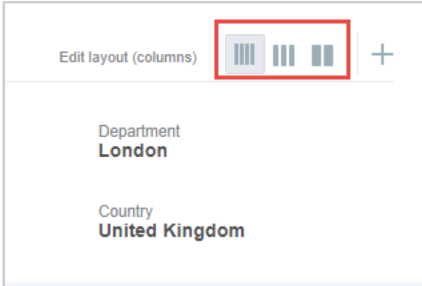


Warning: Users will not be able to see information hidden by a switch or role permission, (for example, "Cost" or "Rate"). These fields will instead display an empty field. Custom fields and their data are always visible. Do not add custom fields to the Resource Profile which should remain hidden from some users.



To edit which fields appear in the header:

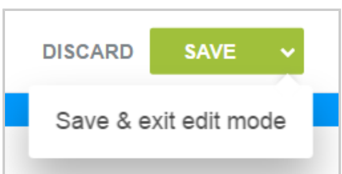
1. Click the menu icon and click **Edit layout**.
2. Click the Number of Columns icon for how many columns (2, 3, or 4) you would like to use.



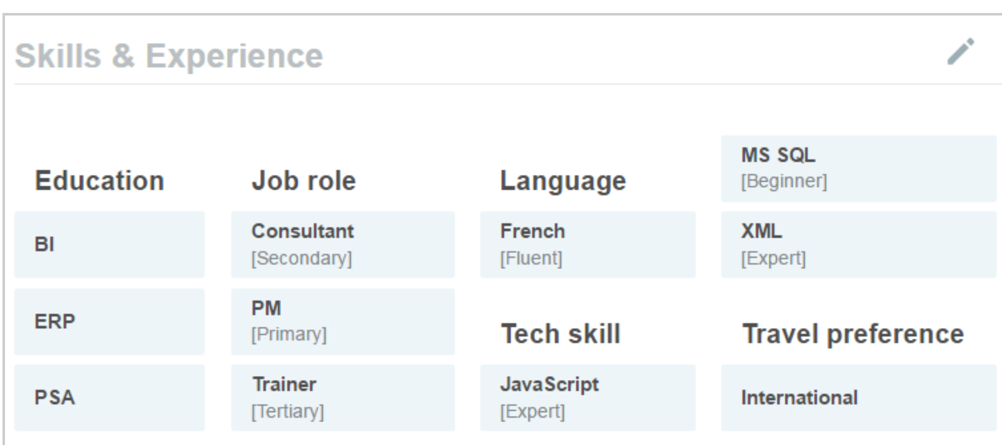
3. Click the Add new item + icon. The Add new item menu opens.
4. Click on fields in the “All” list which you want to appear in the header. You can also click “Select All” to add all available fields to the header.
5. Click the X icon next to selected fields to remove them from the header individually. You can also click “Clear All” to remove all fields from the header.
6. Drag fields in the “Selected” list to arrange them in the order you would like.
7. Click **OK**.
8. Click **Save** to save the changes without leaving the Consolidated Resource Profile’s edit mode. This is useful if you want to make changes to other parts of the Consolidated Resource Profile.

   Click the icon next to Save and click **Save & exit edit mode** to save your changes and exit the Consolidated Resource Profile’s edit mode.

   Click **Discard** to exit edit mode without saving any changes.



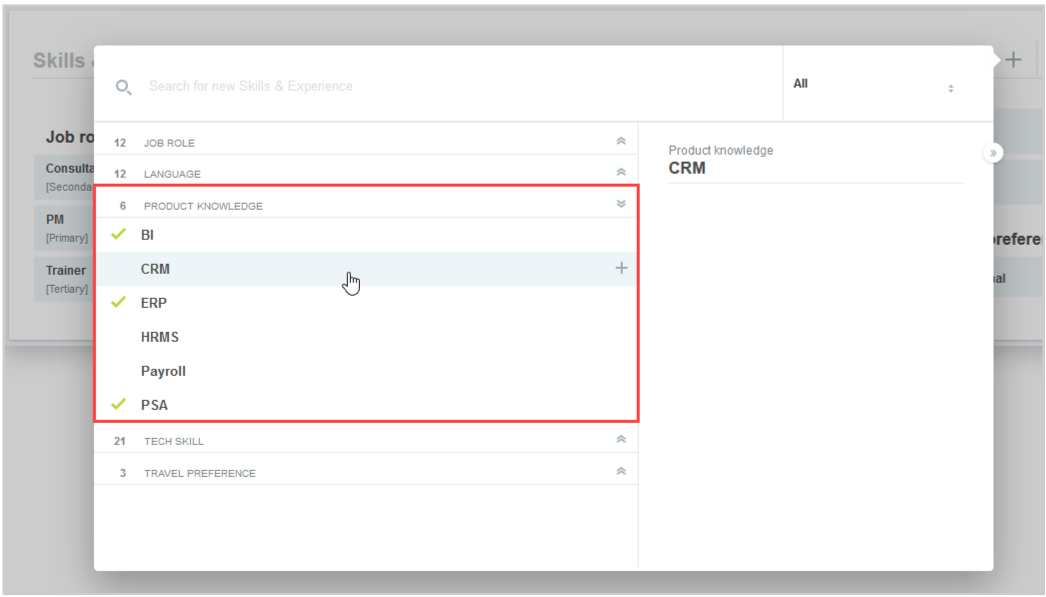
> **Note:** Users with the "Edit Consolidated Resource Profile layout and settings" role can change the layout of the consolidated resource profile for your company's account. Simply select any resource's profile, edit and save the layout, and it is modified across the whole account.
>
> Below the header is a table of the resource's skills and experience. Click each skill to see descriptions of each skill level.



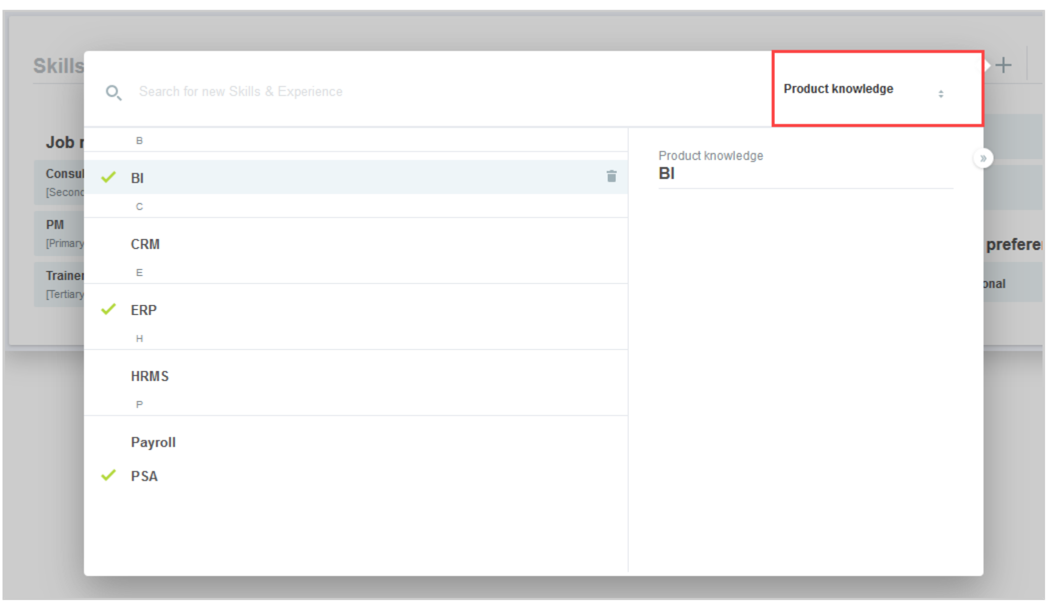
To add skills in the Consolidated Resource Profile:

1. Click the “Edit skills” icon.
2. Click the “Add Skills” icon.
3. Click the Skill and Skill Level you would like to add from the list on the left side of the form. The skill will be added to the Consolidated Resource Profile when you click it. You can also search for a skill’s name using the “Search for new skills...” field at the top of the form.

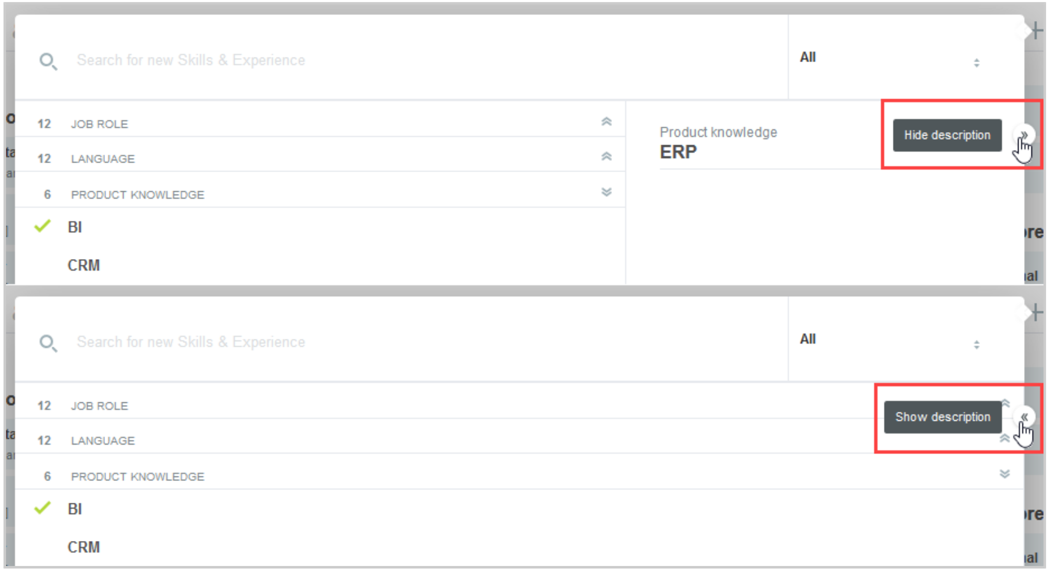
   Skill levels roll up under categories which you can expand or collapse to see only the skills you want. Each category shows how many skills or skill levels are available for it.



The skills picker also contains a category filter. Use it to select a specific skill category, and the picker only displays skills which are available for that category. You can use the text search field to quickly find desired skills within this filtered list.



Use the icons on the right hand side of the skills picker to hide or show the skills description.



> **Note:** You can use the keyboard arrow keys and search form to quickly navigate through the new skills form without needing to use a mouse.

4. Click anywhere outside of the form to close it and return to the Consolidated Resource Profile. The skill or skills which you added will be highlighted in blue.
5. Click **Save** or **Save & Submit** to save the new skills.

> **Note:** If your company has the Skills Approval feature enabled, you can still save skills, however, they will not be permanently saved to your profile until approved by your designated approver.

To edit skills in the Consolidated Resource Profile:

1. Click the “Edit Skills” icon.
2. Click the icon next to the skill you want to edit.
3. Click **Edit**.
4. Click the skill level in the Choose Skill Level header to change the skill level.
5. Enter a note for the skill and level (optional). Notes for skills appear when pointing to the skill in a resource’s Consolidated Resource Profile.
6. Click **OK**.

Newly added skills are highlighted in blue. No changes are saved until you click **Save**.

> **Note:** If Skills Approvals are enabled, when you edit a skill, it will be marked as “Pending approval”. The resource profile approver can then approve the changes.

To delete skills in the Consolidated Resource Profile:

1. Click the “Edit Skills” icon.
2. Click the icon next to the skill you want to edit.

3. Click **Delete** to remove the skill from the Skills & Experience table. If you delete a skill by mistake, click the ⋮ icon and click **Revert / Undo**.

> **Note:** If Skills Approvals are enabled, when you delete a skill, it will be marked as “Pending approval”. The resource profile approver can then approve the deletion.

Deleted skills are highlighted in red. No changes are saved until you click **Save**.

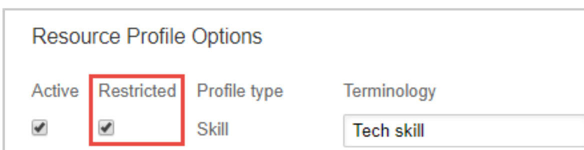
It is also possible to restrict skills which users can see based on their role permissions. To enable this feature, contact OpenAir Customer Support and request the **Restricted Skills in Consolidated Resource Profile** feature.

When a skill is restricted, only Administrators or users with one of two role permissions can see or edit it. Non-administrators who do not have one of these role permissions will also not see the restricted skills in dropdown lists or selectors. The role permissions are:

- **View restricted profiles** – User can see restricted skills in Consolidated Resource Profile, but cannot edit them
- **View and modify restricted profiles** - User can see and edit restricted skills in Consolidated Resource Profile

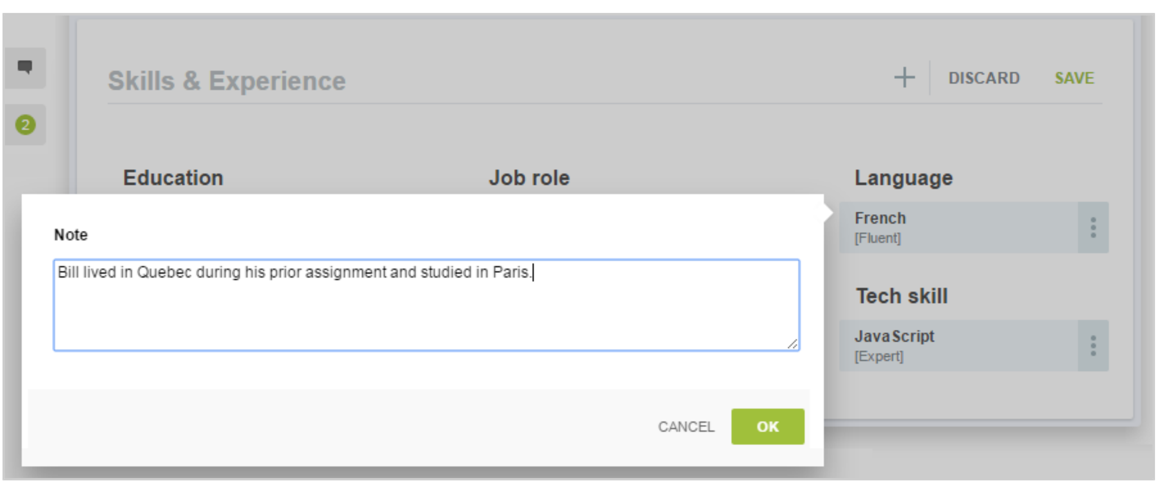
To restrict skills by role permission in the Consolidated Resource Profile

1. Go to Administration > Application Settings > Resources > Resource Profiles.
2. Select the **Restricted** checkbox next to the skill you want to restrict.



To add resource profile comments to a resource's skills:

1. Click the Edit skills icon.
2. Click the ⋮ next to the skill you would like to add a comment to and select **Edit note**.
3. Add the profile comment in the Note field and click **OK**.
4. Click **Save** in the upper right corner of the Skills & Experience table.



The information in Resource Profile notes can be displayed in Advanced Resource Profile Reports.

To show Resource Profile comments in Resource Profile advanced reports:

1. Go to Reports > Advanced > Resources > Resource profiles.
2. In the "Filters and layout options" section of the Resource profiles form, click **> Edit** next to "Report layout".
3. Select the "Comment" field in the "Available" list and click **Add selected >**.
4. Click **OK**.
5. Click **Run the report** to create the populated report now or **Save** to save the report settings and run it later.

When the report is run, the "Comments" column will be added to the report and populated with comments entered in the consolidated resource profile.

Resource profiles

modify report re-run report

Resource	Profile	Profile type	Last updated	↓ Comment
Carr, Bill	Consultant	Job role	03/15/17 03:55 PM	
Carr, Bill	French	Language	03/16/17 02:28 PM	Bill lived in Quebec during his prior assignment and studied in Paris.

Customized User Avatars

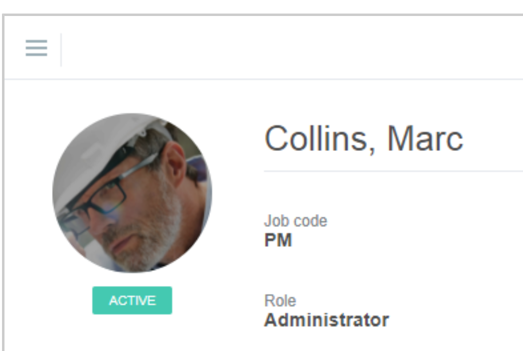
When this feature is enabled, you can upload avatars for users or give them the permission to replace the generic OpenAir resource profile picture in their Resource Profile.

Note: To enable this feature, contact OpenAir Customer Support and request the Customized user avatars feature. The Consolidated resource profiles feature must also be enabled to show custom profile picture on the user interface.

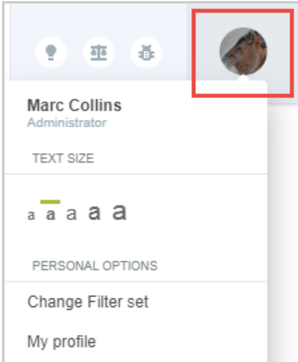
Important: If this feature is disabled, all uploaded avatar images are deleted.

The avatars appear in:

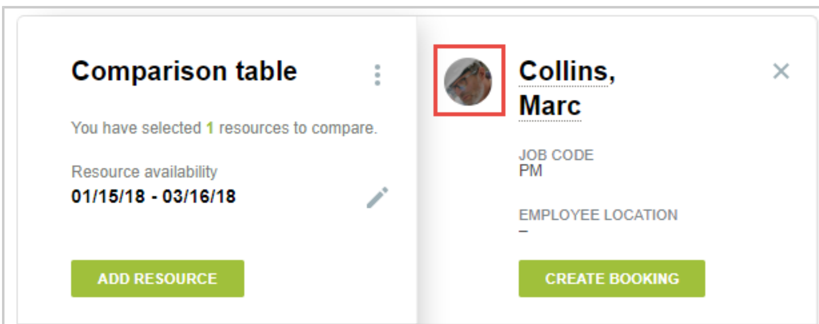
- Consolidated Resource Profile.



- User Center.



- Resource Compare View



The following image formats are supported: BMP, GIF, PNG, and JPG. The image file size cannot be larger than 1 MB. Uploaded avatar images do not count against your account storage.

Two role permissions can be assigned to users:

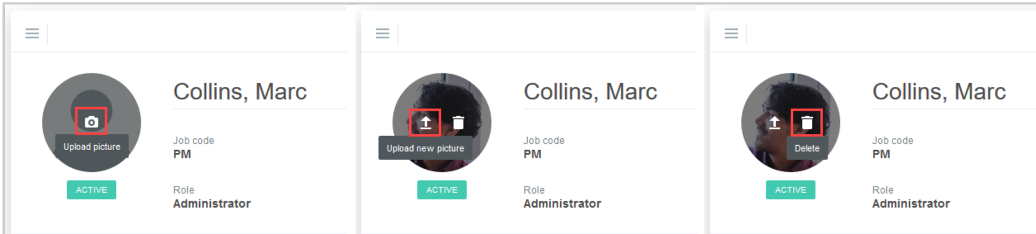
- **Modify own Profile picture** allows users to modify their own profile picture.
- **Modify all Profile pictures** allows a user to modify all pictures for all users they have access to.

> **Note:** You need to have the **Modify Own Profile picture** role permission to upload or change your own profile picture. You need to have the **Modify all Profile pictures** to upload or modify profile picture for any resource you have access to.

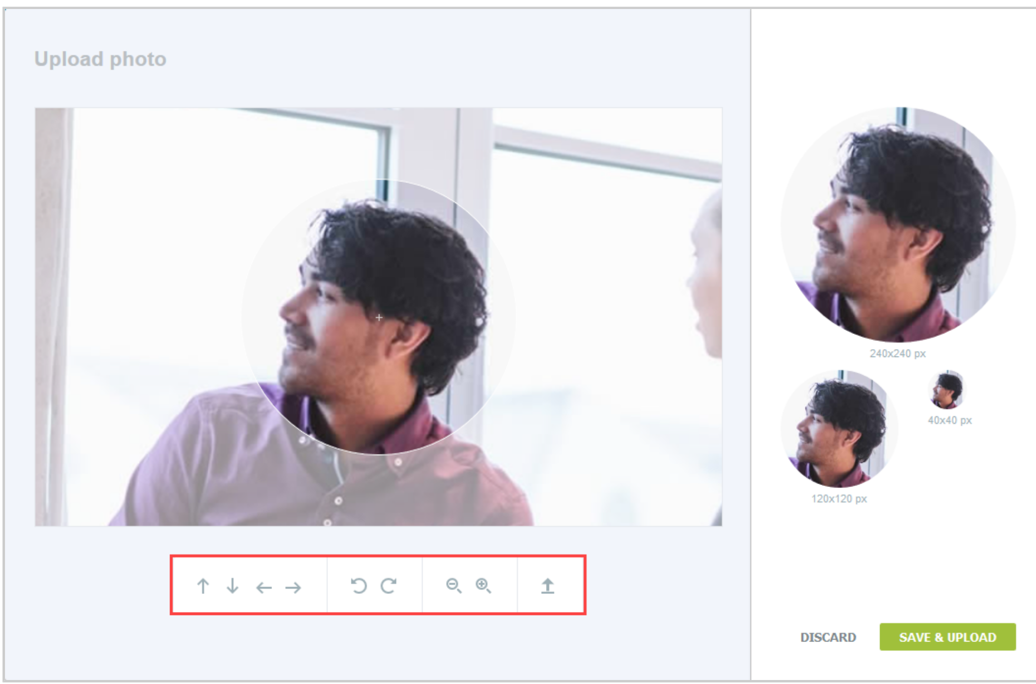
To change a profile picture:

1. Go to Resources > Resources > [choose a resource] > Profile to open the Consolidated Resource Profile for the resource whose profile picture you want to add or change. Go to User Center > My Profile if you want to add or change your own profile picture.
2. Hover the mouse cursor over the profile picture and click the camera icon to add a profile picture, or the upload icon to replace the existing profile picture. A file selection dialog appears.

Note: You may also use the delete icon to delete the profile picture.



3. Select an image file and click **Open**. The image file cannot be larger than 1MB and must be one of the supported formats (BMP, GIF, JPG, or PNG). The Upload photo window displays with your selected image file.
4. Select the part of the image you want to use for the profile picture. A preview of the profile picture displays in the right pane. Use the mouse to position the image or click the icons under the picture to position the picture, rotate it, zoom in/out or select a new image file.



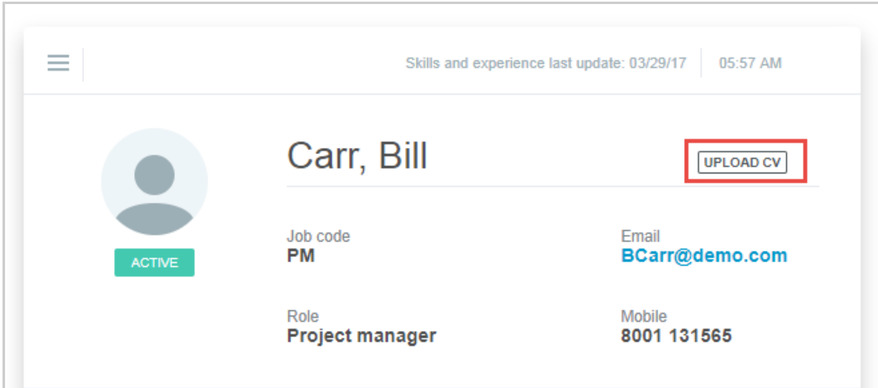
5. Click **Save & Upload**. The Consolidated Resource Profile displays with the new profile picture.

Résumé and Curriculum Vitae (CV) Management in Consolidated Resource Profile

To upload a resource's first résumé or CV to their profile using the Upload CV button:

1. Go to Resources > Resources > [Select a resource's Employee ID].
2. Click **Upload CV**.

3. Select the file to upload.



Once a résumé or CV has been uploaded for a resource, the **Upload CV** button will become the **Download CV** button. To upload a new résumé or CV for a resource who already has one stored, use the **Upload CV** button in the Resource Profile Menu.

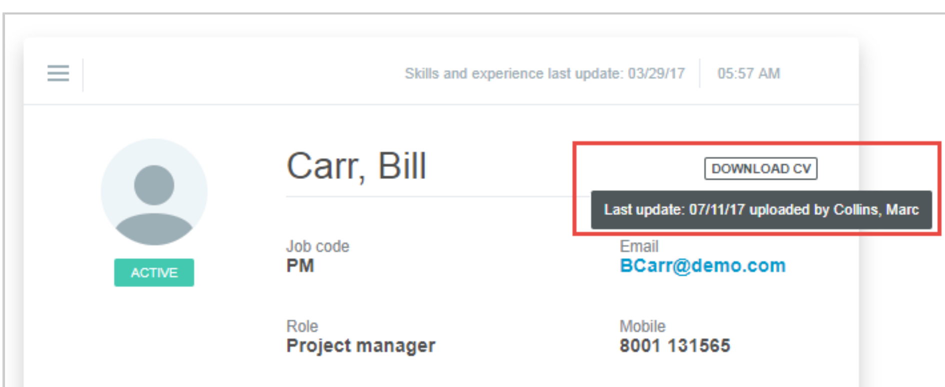
To upload a résumé or CV to a resource's profile using the Resource Profile Menu:

1. Go to Resources > Resources > [Select a resource's Employee ID].
2. Click the **Resource Profile Menu** button and select **Upload CV**.
3. Select the file to upload.

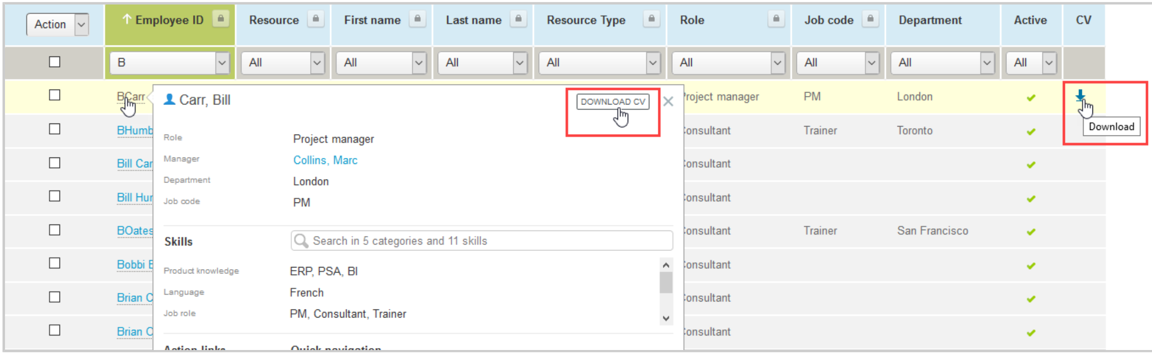
> **Note:** Uploading a new résumé or CV does not overwrite old résumés or CVs. All stored versions are available in the **Manage CVs** button in the Resource Profile Menu.

To download a résumé or CV from a resource's profile using the Download CV button:

1. Go to Resources > Resources > [Select a resource's Employee ID].
2. Click **Download CV**. OpenAir will download the last résumé or CV which was uploaded for this resource.

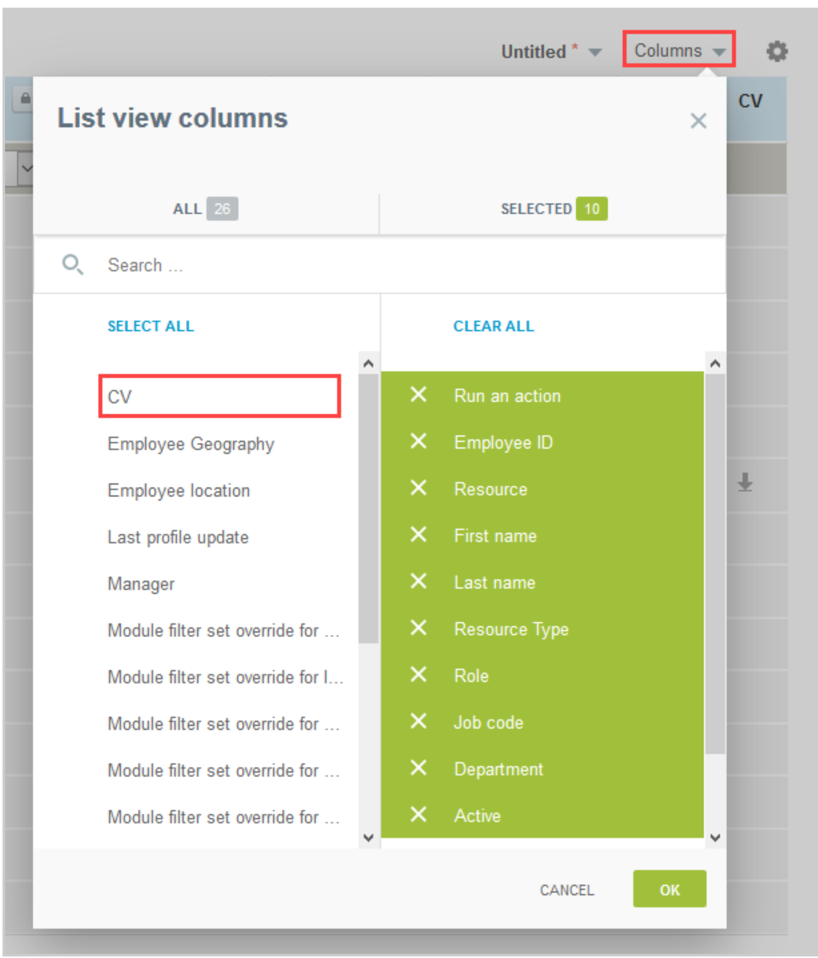


You can also download a résumé or CV by clicking **Download CV** from the resource QuickView or by clicking the download icon from the resources list view or any other list view containing information about resources.



To add a CV column to any of the list views containing information about resources

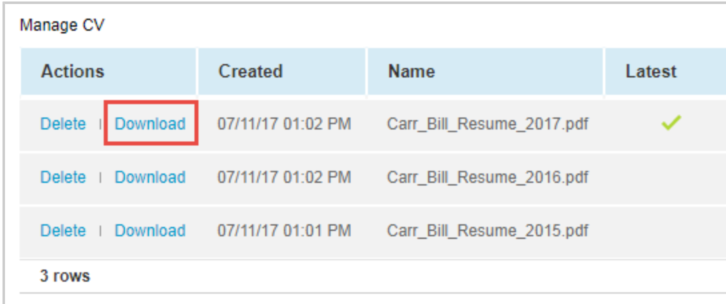
1. Go to the list view containing information about resources.
2. Click **Columns** in the list view toolbar.
3. Select **CV** from the list of available columns.
4. Click **OK**.



To download a resource’s older résumés or CVs:

1. Go to Resources > Resources > [Select a resource’s Employee ID].

2. Click the **Resource Profile Menu** button and select **Manage CVs**.
3. In the Actions column, click the **Download** link for the résumé or CV you want to download.

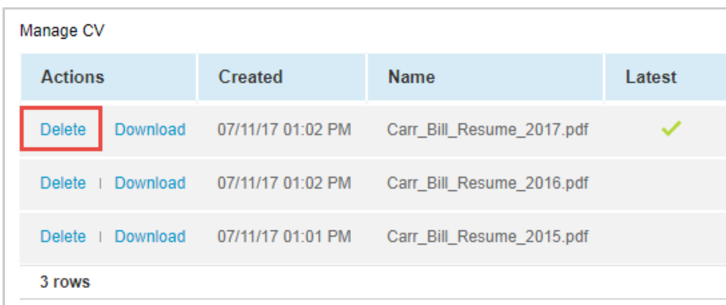

Manage CV

Actions	Created	Name	Latest
Delete I Download	07/11/17 01:02 PM	Carr_Bill_Resume_2017.pdf	✓
Delete I Download	07/11/17 01:02 PM	Carr_Bill_Resume_2016.pdf	
Delete I Download	07/11/17 01:01 PM	Carr_Bill_Resume_2015.pdf	

3 rows

To delete a stored résumé or CV:

1. Go to Resources > Resources > [Select a resource's Employee ID].
2. Click the **Resource Profile Menu** button and select **Manage CVs**.
3. In the Actions column, click the **Delete** link for the résumé or CV you want to delete.
4. Click **OK** to confirm the deletion.

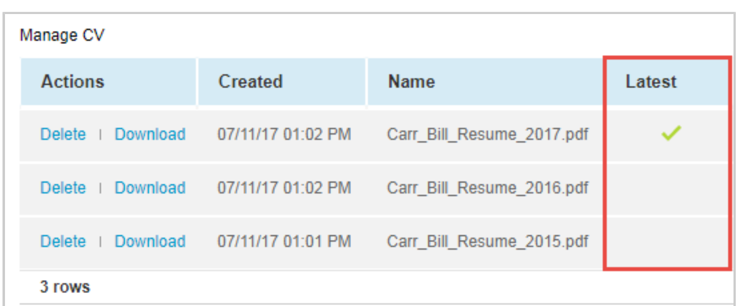

Manage CV

Actions	Created	Name	Latest
Delete I Download	07/11/17 01:02 PM	Carr_Bill_Resume_2017.pdf	✓
Delete I Download	07/11/17 01:02 PM	Carr_Bill_Resume_2016.pdf	
Delete I Download	07/11/17 01:01 PM	Carr_Bill_Resume_2015.pdf	

3 rows

Tip: When you point to the Download CV button, a tooltip appears to show when file was last updated.

The **Latest** column in the **Manage CVs** list view contains a check mark for the most recently uploaded résumé or CV.


Manage CV

Actions	Created	Name	Latest
Delete I Download	07/11/17 01:02 PM	Carr_Bill_Resume_2017.pdf	✓
Delete I Download	07/11/17 01:02 PM	Carr_Bill_Resume_2016.pdf	
Delete I Download	07/11/17 01:01 PM	Carr_Bill_Resume_2015.pdf	

3 rows

Skills Approval

With this feature, you can delegate the responsibility of keeping your resources' profiles up-to-date. OpenAir notifies you when your resources update their skills in the Resource Profile. With your approval, the skills are updated.

Note: To enable this feature, contact OpenAir Customer Support and request the Skills Approval feature.

Resources with either of the following role permissions can edit their own skills and experience in their profile:

- View and modify own resource profile
- View and modify profiles

When a resource makes a change to their resource profile and clicks Save & Submit, the change is marked with a "Pending" tag in their profile. Resources can make changes to skills that have been approved or rejected but not to those that have been changed and are still awaiting approval. When resources hover the mouse over a skill that is pending approval, a tooltip is displayed to indicate that the skill cannot be edited.

You will also receive a notification that your resource has made a change to their resource profile. You can set these notifications in Administration > Application Settings > Resources > Notifications. Once set, email notifications will be sent as with other types of approvals when changes are submitted. Reminders will also appear on the Dashboard.

To approve or reject a resource's changes to their resource profile:

1. Go to Resources > Profile approval > [Select “All” or “Submitted”].

2. Click a change to approve. The “View profile approval lines” page appears.
3. Select the changes you want to approve in the “Run an Action” column.
4. To approve selected changes, click the “Run an Action” dropdown list and select the “Approve selected and reject all others” option. To reject selected changes, click the "Run an Action" dropdown list and select the "Reject selected" option.

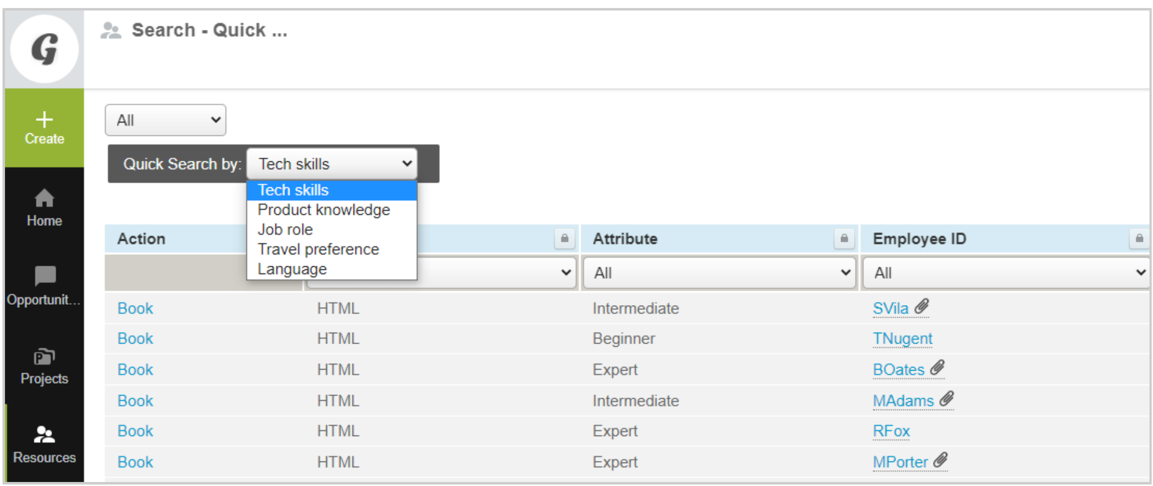
> **Note:** Be sure to select all changes which you want to approve before clicking the “Approve selected and reject all others” option.

Search - Resources Application

There are two types of searches you can perform in the Resources application. They are either a Quick Search or a Custom search. Each is described as follows.

Quick Search

When you select the Quick link from the Search drop-down list, a text box displays with the list of Resource Profiles you specified in your account: Tech Skills, Education, Locations, Job Roles, and Industries.



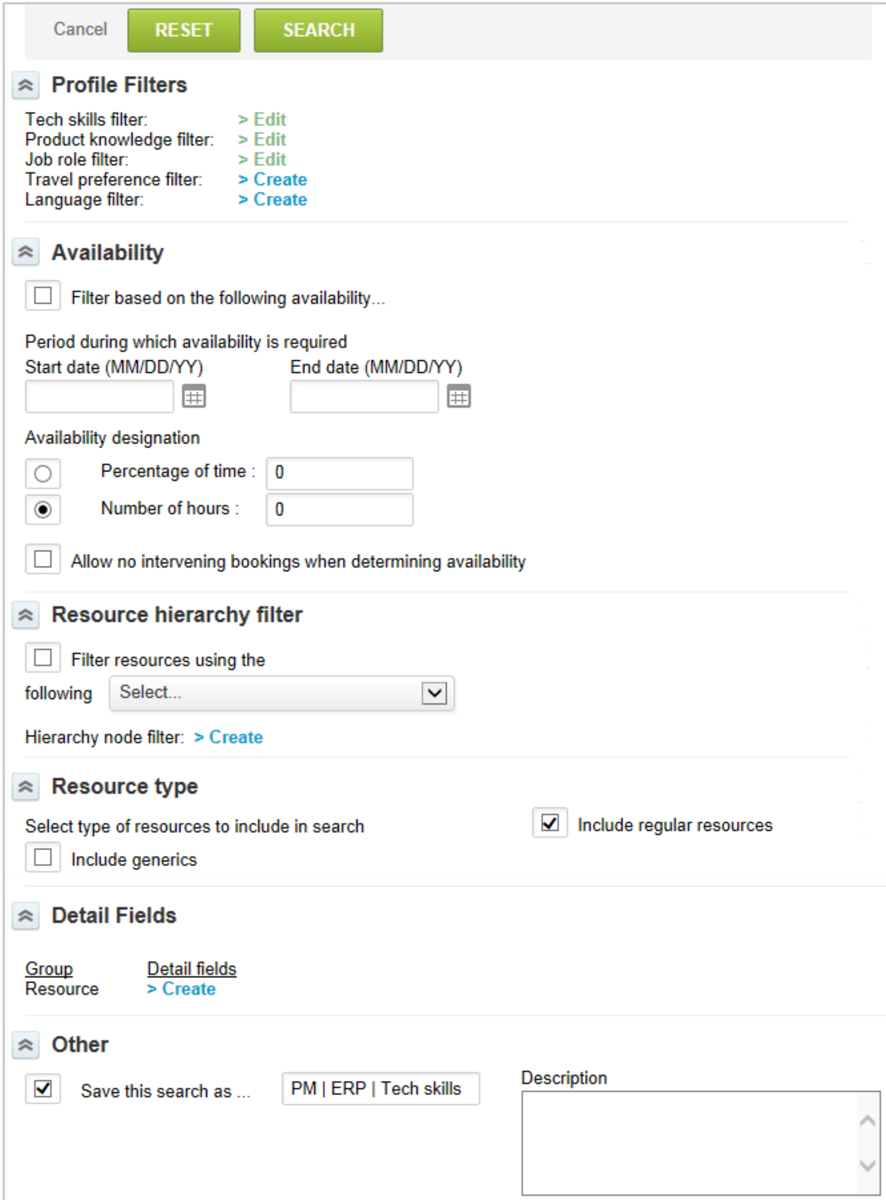
To perform a Quick Search:

1. Go to Resources > Search and select Quick.
2. Select a search item from the drop-down list. The list view refreshes and displays search results.

Custom Search

When you select the Custom link from the Search drop-down list, a Search Criteria form displays and you can identify many different Resource Profile factors to search as well as tag groups and attributes. Remember, you must define profiles and attribute sets and tag groups must be established or they do not display as searchable items.

You can also search on availability that can include a specific time period as well as percentage of time or the number hours a resource is available. Search on experience, resource type, and detail fields. If you save your search and give it a name, it is stored under the Saved Searches link.

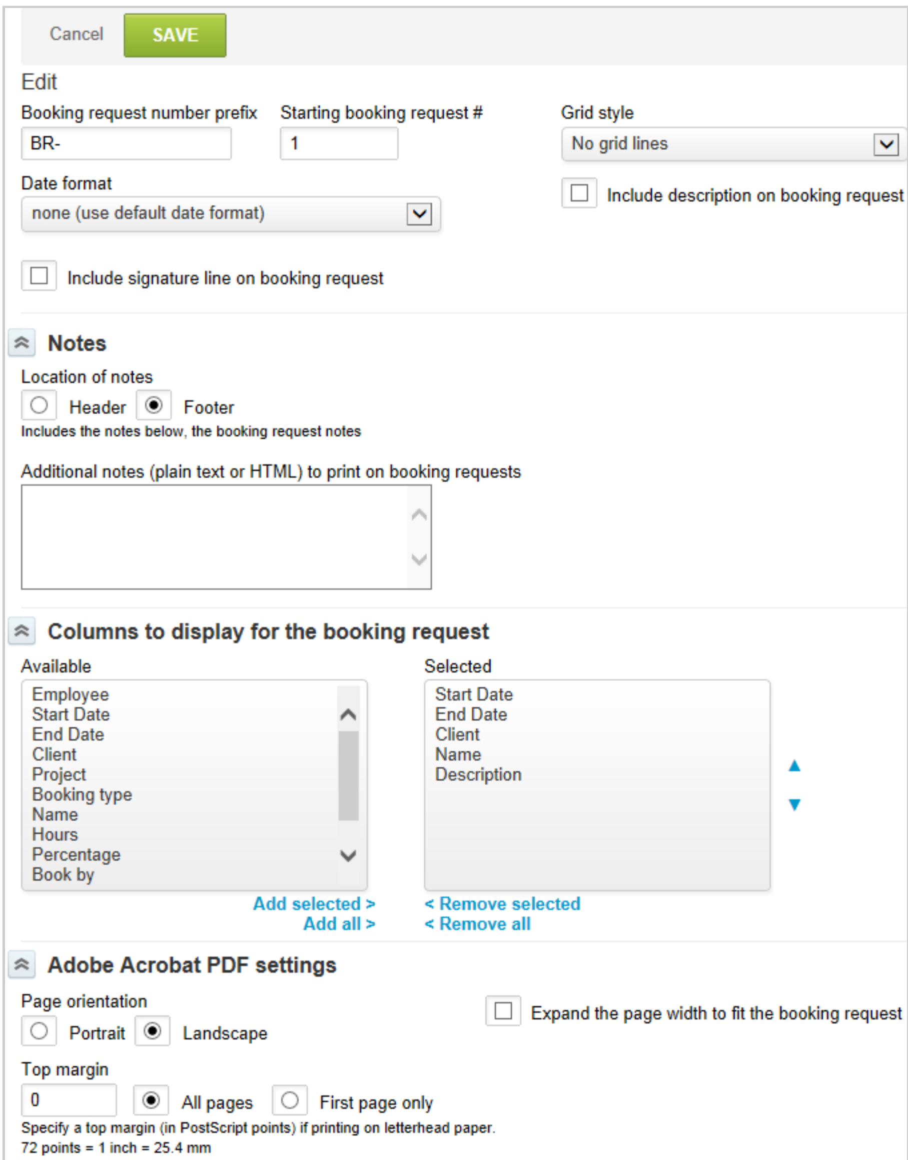


To create a Custom search:

1. Go to Resources > Search and select Custom.
2. Click the Create links under Profile Filters to create filters for each profile. When you define entity tags and attributes for employees, an asterisk displays next to an item.
3. Select a Employee entity tag effective date.
4. Select Availability criteria including start and end dates and availability designations.
5. Select the check box to **Filter resources using the following** and use the drop-down list to identify a specific filter.
6. Select the check box to **Filter customer experience based on** and use the drop-down list to identify a specific filter. You can also add a filter for customer experience.
7. Select the type of resources to include in the search such as regular resources, generics, or inactive resources.

8. Create detail fields as needed.
9. To save the search for future use, select the check box to **Save this search as ...** and type a name for the search.
10. Type descriptive notes to help you remember the criteria you have specified in the search.
11. Click Search. Search results display the employees who match the Resource/Profile you searched on.

Booking Request Layout



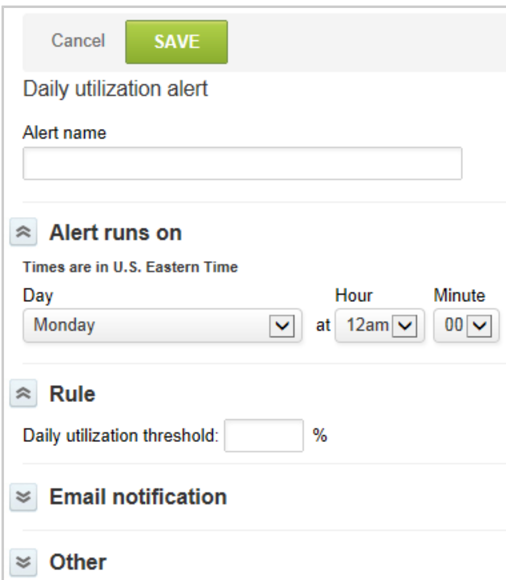
If you have enabled the switch for Enable booking requests, the Booking request layout link displays under Resources Settings. See Resources Other Settings.

Use the Booking request layout form to design a form that meets your company's needs and helps employees request resources they need.

To access and modify the Booking request layout:

1. Go to Administration > Application Settings > Resources > Booking request layout.
2. Select the prefix and starting resource request number. "BR-" is the default prefix and starting number defaults to 1.
3. Select the **Grid style** format of the report and **Date format** from the drop-down lists.
4. As required, add additional notes in the header or footer.
5. Choose the particular fields that you would like to display on the booking request.
6. Choose the Adobe Acrobat PDF settings you would like to use in your environment.
7. Click Save.

Alerts



You can configure a Daily utilization alert for Resources in OpenAir accounts. The alert runs every day and an email is sent when booked utilization threshold is exceeded.

Alerts allow automated email reminders to be sent to ensure business needs are met. In the Resources application, a form is provided to help you create a Daily utilization alert.

To create a Daily utilization alert:

1. Go to Administration > Application Settings > Resources > Alerts.
2. Select **New Daily utilization alert** from the **Create Button**.
3. Type an Alert name.
4. Under **Alert runs on**, select the day and time when the Alert should run.
5. Under **Rule**, type the Daily utilization threshold percent. Exceeding this threshold generates the alert notification.
6. Use the Email notification section to define who receives the email, the email sender, subject, and email text.

> **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`. See also Email Settings.

7. Check the **Add information about employees exceeding the utilization threshold** box . This provides specific employee information.
8. Type notes, as desired. These notes do not appear anywhere in the alert; they are for informational purposes, such as remembering why the alert was created.
9. Check the **Active alert** box to make this alert active.
10. Click Save.

Resources Other Settings

The Resources application lets you request, book and track resources (active OpenAir employees) against one or a number of projects in OpenAir. There are a number of settings within the application that control the rights and permissions available to specific Roles. These options are indicated below.

In addition, the Resources application lets you enter particular skills, education, and industries to an employee's profile to create a skills-experience database for your resources that you can search. See Search - Resources Application.

To access the Resources Other settings:

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

Notify booked resource when a booking is added, modified, or deleted: When you activate this option, OpenAir creates email notifications and sends them to any resource who has a booking entry created, modified, or deleted for him or her.

> **Note:** Notifications are sent for each booking entry. When using the booking worksheet, entries into each column creates individual booking entries, which causes an email notification to be sent for each booking.

Prepend 'OpenAir' on the subject line of booking notifications emails: The email subject for booking notifications defaults to New Booking Created. Selecting this option prepends OpenAir to the subject line to make it clear to the employee that the email is coming from OpenAir. You can customize the booking notification subject and email body per your company's needs.

Notify manager of booked resource when a booking is added, modified, or deleted: If you activate this option, OpenAir creates email notifications to a resource's manager for each booking entry created, modified, and deleted.

> **Note:** Notifications are sent for each booking entry. When using the booking worksheet, entries into each column creates individual booking entries, which causes an email notification to be sent for each booking. If an employee's Demographic form does not have a Manager identified, emails are not generated.

Require booking type when booking resources: If you have implemented booking types, this option lets you make this field mandatory for all bookings created in your OpenAir account. This requires you to define a complete set of booking types so that a valid value is always able to be selected for any type of booking entry. At least one booking type must be active for the option to be available. If there are no booking types active, then this feature does not have any impact.

Always 'Book by' for bookings, booking requests, and deal booking requests: By default, OpenAir permits bookings to be entered by hours or by a percentage. Setting this option for strictly a percentage or strictly hours removes the ability to override the booking by the other option (e.g., If set to Percentage, all bookings must be set in percentages and cannot be entered in hours).

Default 'book by' value to use for new bookings when the default value is not otherwise implied: This is a default setting for how an employee is booked to a project/task, by hours or by percentage. This can be overridden on the booking form or worksheet for each entry.

Default 'book by' value to use for new booking requests when the default value is not otherwise implied: If you have activated the use of booking requests within the resource application, this option sets a system default for how a booking request entry is created, by hours or by percentage. This can be overridden on the booking request form for each entry. If you do not have booking requests enabled, activation of this option does not have any impact.

Enable customer experience in resource searches: The Quick Search and Custom Search tabs within the Resource application by default do not include customer experience, which are the past Customer : Project worked within OpenAir. Activating this option provides customer Experience as a search option allowing you to select specific customers in the search criteria.

> **Note:** If you have set up a skill database and created a profile category to capture customer experience, this option should not be confused with skill database entries. Customer Experience within OpenAir is strictly based on Customer : Project association of the employee within OpenAir (i.e., Timesheet entries).

Allow searches for inactive resources: Inactivating a resource removes the resource from various dropdowns and selection fields throughout OpenAir. Some forms allow the inclusion of inactive resources within a specific dropdown or selection list. By default, the search functionality within the Resources application does not include inactive resources. By activating this setting, an **Include inactive resources** check box displays on the custom search field, which permits the inclusion of inactive resources in the search. If the Redesigned Advanced Filters feature is also enabled for your account, you can also search and select both active and inactive employees as values in your advanced filter conditions.

Enable resource substitution searching on bookings: Bookings created for employees may need to be changed due to resource conflicts or the replacement of a generic placeholder resource with an available employee. Activating this setting permits a substitution option to appear on booking list views and individual booking forms. How substitution candidates are identified is dependent on the criteria option listed below. The substitution feature saves data entry time should bookings require modification.

> **Note:** If you have email notifications activated for Bookings, the substitution of resources generates an email notification to both the original resource of the booking and the substituted resource of the booking. The only exception is when a generic resource is substituted as they do not have an email address specified in OpenAir.

Criteria to use when searching for a resource to substitute for another a resource on a booking: Searching the criteria for substitution candidates can be one of two types: by Profile or by Job code. The Job code is more of a one-to-one mapping that identifies resources with the same job code as the current resource in the booking. Profile uses the entries from the skills database to look for comparable matching resources. If your skill database is very robust, the search may often times return few or no results. In these instances, the Job code substitution option would be best. The job code is derived from the **Job code** setting identified on the Employee Demographic form.

Enable multiple booking resource substitutions in one action: When enabled, resource managers have the ability to replace multiple resource bookings on the bookings list view by selecting multiple resources and using the **Run an action** function.

Show the related profile name on profile type drop-downs and pickers: When configuring a skills database within OpenAir, a number of dimensions such as Skill, Industry, Location, and Education are defined. Each dimension may be associated with another dimension. When this is enabled, you may optionally choose to display the related profile dimension in the drop-down selection associated with another dimension. For example, you may want to relate a skill with a particular industry. In the drop-down list for the skill dimension, you see ABC Industrializes Skill.

Respect filter sets when generating availability reports

Enable booking requests: Bookings may be created/modified/deleted by employees with granted Role permissions. Depending on your business process, the resource who creates a booking within OpenAir may not know whether a specific resource is needed or what type of resource is required. Enabling Booking requests enables the booking request feature to be available to employees with the appropriate role permissions to submit booking requests (optionally through an approval process) for a particular employee or a generic resource for a particular duration and effort. Approved booking requests automatically create booking entries, either to the specified employee or to the generic resource.

> **Important:** To enable this setting the following internal switches must be disabled: **Enable approvals for bookings** and **Enable project booking automation**. Contact OpenAir Customer Support or OpenAir Professional Services to discuss these options.

Booking requests can only be created for generics: By default when the Booking request feature is activated, any specific or generic resource may be entered on the request. Activating the Generic only feature supports a business process of having only a generic resource available to be chosen on the booking request. The resource reviewer/approver provides the named resource to be booked to the project. This would also require the option to **Edit a submitted booking request** to be enabled. When the generic resource request has been approved, another business process to book a named resource to the project is required. This would replace the generic booking with a named employee.

Booking request approvals are for the requested resource: This option directs how the Booking request is routed for approval. If this selection is enabled, the booking request is sent to the requested resource's approver. If left unchecked, the booking request is forwarded to the approver of the person making the request. To avoid confusion with approval routings, it is suggested that an Approval process is created to direct booking requests to the proper individuals. For more information, see the Approval Routing.

Enable additional required category in resource request queue for absolute requirements: Use the “Required” category in resource requests to include only resources with the skills selected. The “Required” category works as a filter, and when a resource search is performed, only resources with the skills selected in this category will appear in results.

> **Note:** Available when the Resource Demand Request feature is enabled for your account.

The booking type field on booking requests cannot be modified: When a Booking request is initially created, the booking type field can be entered if you have configured Booking types and have at least one active entry. When the Booking request has been submitted, the booking type field cannot be modified if this option is activated.

Copy the approved booking request notes to the automatically generated booking: Notes may be entered on a Booking request. This information may be useful for reference in the Booking after the booking request has been approved. Activating this option permits the notes to be automatically copied to the booking. This is extremely useful to identify the appropriate named resource when generic resources are used on booking requests.

Do not allow booking request submission if time is booked to an inactive option: Employees entering booking requests against Customers : Project (or Customers, and possibly at the Task level) are provided a drop-down lists of these items. This option prevents the submission of a booking request if the employee is able to view a Customers : Project when the booking request is created but later the Customers : Project is inactivated before the booking request is completed and submitted. If this option is unchecked and the Customers : Project is inactivated during the booking request creation and submission process, the booking is allowed against an inactive project since the booking request was already in progress.

Allow an approver to edit a submitted booking request: When booking request approvals are used, booking requests are submitted for review by a defined employees who then approves or rejects the booking request. To avoid time delays introduced by having the reviewer reject a booking request and then the owner changing and resubmitting the request, activating this option gives the reviewer the ability to edit the booking request worksheet entries directly before continuing with an approval. This feature is useful to allow a booking request approver to substitute resources, if necessary, such as when a generic resource is selected in the request and a replacement of an available resource is required. This action is independent of any employee application role settings.

Weekly booking worksheets start on: The first day of the week for the booking worksheet can be set to any specific day of the week or to the first day of the week defined in the user demographics by selecting "From Employee demographics" in the dropdown. Selecting a day of the week for this option identifies the definition of a week within OpenAir. The OpenAir permits weekly reporting and worksheet displays of weekly time periods. Each of these are dependent on what the specific week start setting that has been selected. This is most obvious in the Reports application under the Advanced tab for Timesheet and Expense status reports. Selecting a number of weeks to display show the defined employee week start values, which may not align with your particular employee week start setting. If this is the case, it may appear as if multiple timesheets have been submitted for a particular week, when in actuality it is just the misalignment of the week start setting throughout OpenAir.

Add booking custom fields to dynamic booking worksheet: The dynamic booking worksheets are available in the Resources application under Booking requests and Bookings. By default, these worksheets do not include custom fields that may have been created for display and entry on the individual booking forms. Activating this feature includes the custom fields on the worksheet as well as the booking forms for proper data entry.

Allow an approver to edit a submitted booking: This option is mutually exclusive with the booking requests feature.

Do not allow booking submission if time is booked to an inactive option: This option is mutually exclusive with the booking requests feature. This option prevents the submission of a booking if any of the following properties are set to a record that is not marked as active: Customer, Project, Resource and Booking Type. If an employee attempts to submit a booking associated with an inactive customer, project, resource or booking type using the Booking form, the dynamic booking worksheet, the advance booking worksheet, or actions in the Bookings list view, an error message will be displayed and the booking will not be submitted. For example:

- An employee creates a new booking, selects a Customer:Project from the dropdown options and saves but does not submit the booking. The customer or project associated with this booking is inactivated before the booking is submitted. The employee will not be able to submit the booking and will be prompted to verify the customer or project associated with the booking.
- An employee navigates to the Advanced Booking Worksheet and copies an existing row to create a new booking. If the booking is associated with an inactive project or resource, on Save and submit, an error message will appear listing the inactive records preventing bookings from being submitted and the corresponding cells will be highlighted in the Advanced booking worksheet.

Require a task selection on bookings: This option requires specifying a Task when booking a resource to a project. If this is not selected, the task field does not display on the booking form. If tasks do not exist on the project to which the booking is being created, the booking does not save.

Resource planner booking bar format - text options in drop down : This sets the format of the text displayed on the booking bars in the resource booking planner.

Disable daily option in resource planner : This disables the daily utilization option in the resource booking planner, which calculates utilization for each day.

Disable weekly option in resource planner : This disables the weekly utilization option in the resource booking planner, which calculates utilization as the average of all bookings within a particular calendar week.

Disable monthly option in resource planner : This disables the monthly utilization option in the resource booking planner, which calculates utilization as the average of all bookings within a particular calendar month.

> **Note:** To enable the "Resource planner booking bar format" and "Disable daily/weekly/monthly option in resource planner" settings, the following internal switch must be enabled: **Enable resource planner**. Contact OpenAir Customer Support to request this feature.

Preferred landing page for resources: This sets the default landing page for all users opening resources, e.g. Allocations Planner.

> **Note:** Administrators can also set a preferred landing page for individual users in the user demographic settings. Users can set their own preferred landing page from User Center > Personal Settings > Resources Options.

Hide inactive skills on resource profiles: Check this box to hide inactive skills in consolidated resource profiles.

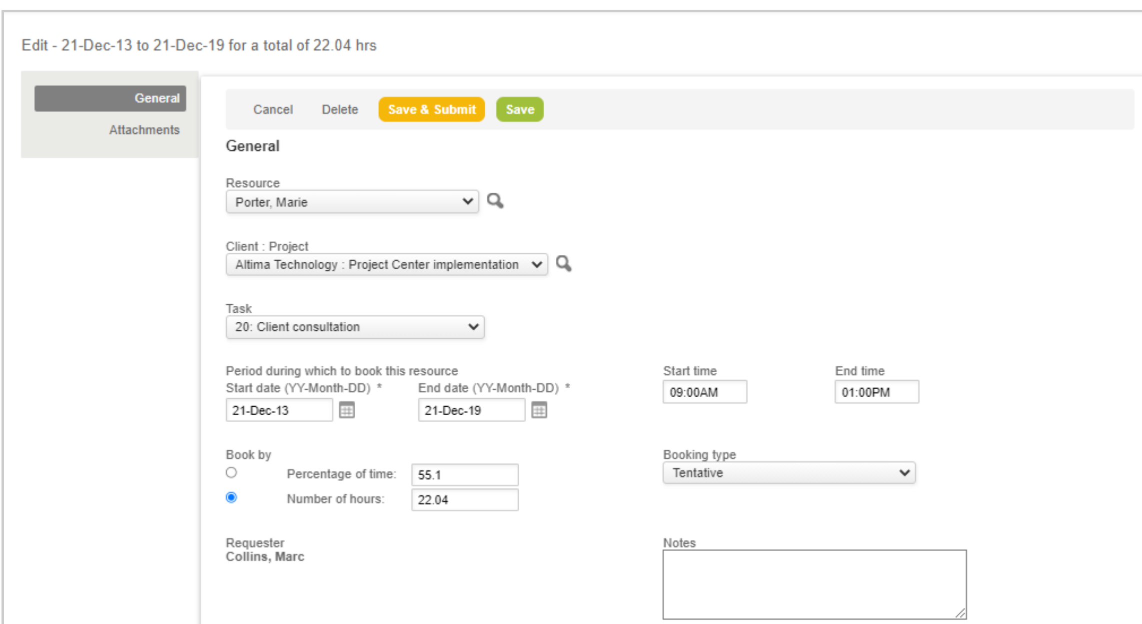
> **Note:** The option to hide inactive skills is available only if the consolidated resource profiles feature is enabled for your OpenAir account.

Frequently Asked Questions (FAQs)

How to add start and end time to bookings?

By default, OpenAir lets you add start and end dates for bookings but not start and end times. To show the start time and end time field on the booking entity form you need to enable work schedule time ranges and configure start times in the employee work schedule.

- To enable work schedule time ranges — Go to Administration > Global Settings > Account > Optional Features , check the **Enable work schedule time ranges** box and Save. See Optional Features.
- Resources must have the relevant start times specified in their work schedule to be available for booking. For more information about configuring start times in work schedules, see Work Schedules.



If the booking spans more than one day, resources are booked based on the number of hours the resource is available in the day.

The Start and End time fields are available:

- On the booking entity form
- On a list view column and advanced filter
- In Email Templates and Reports

You can show the Start and End time on the booking chart view when users point to a booking. To enable this contact OpenAir Customer Support and request to **customize text to display on hover**.

Employees can also add the Start and End time of bookings on their Calendars in OpenAir (Home > Calendars).

To add booking Start and End time on a calendar:

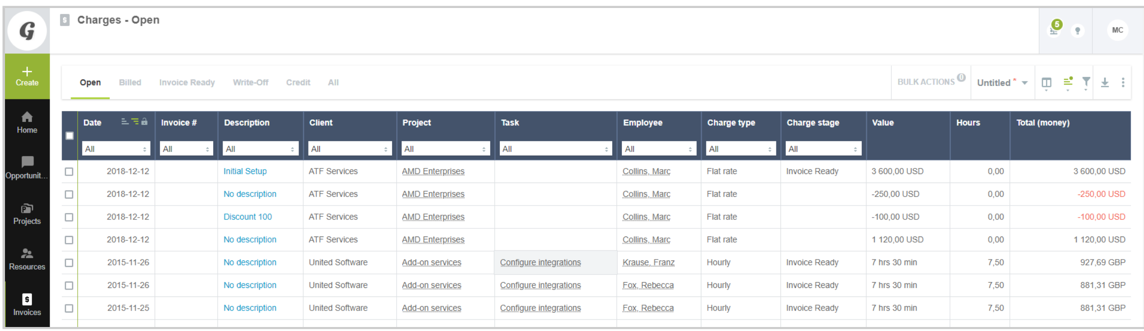
1. Go to User Center > Personal Settings.
2. Check the **Show work schedule time ranges on the calendar** box under the Display options section.
3. Click Save.

Invoices

Overview

The Invoices application helps capture the time, expenses, and other charges accrued against a project. You can create charges in the Invoices application and include them in an invoice. You can also create charges when you run billing rules in the Projects application.

Primarily focused on invoicing your Customers, the Invoices application manages the results of running the billing rules which have been set up on projects. The charges created can then be placed on an invoice which is mailed or emailed to the customer. Manual charges may also be created at any time and thus the need to allow configuration items that may contribute to these charge items are available within the Invoice application (e.g., Expense item, Flat rate, etc.).



The Invoices application includes:

Charges — Charges are in different states such as Open, Billed, Invoice Ready, Over Cap, and All. You create charges when you run billing for a project. Under charges, you can either edit charges or create them directly. Options include New hourly, New flat rate, New other rate, and New expense item, Mileage expense item, and New product. You can enter an individual charge to be included in a customer invoice or multiple instances of a charge on a scheduled frequency.

Invoices — All charges that are open and invoice ready display under the Invoices link. You can check all or clear all or select them individually. Click the button on the bottom right to Create the invoice.

Retainers — When a customer provides payment in advance, you create a retainer and apply some or all of the payment against an invoice. When you create a new invoice for this customer, the available retainer balance will display.

For more information about configuring and managing the Invoices application, refer to the following help topics:

- Agreements
- Charge Stages
- Customer POs
- Approval Processes

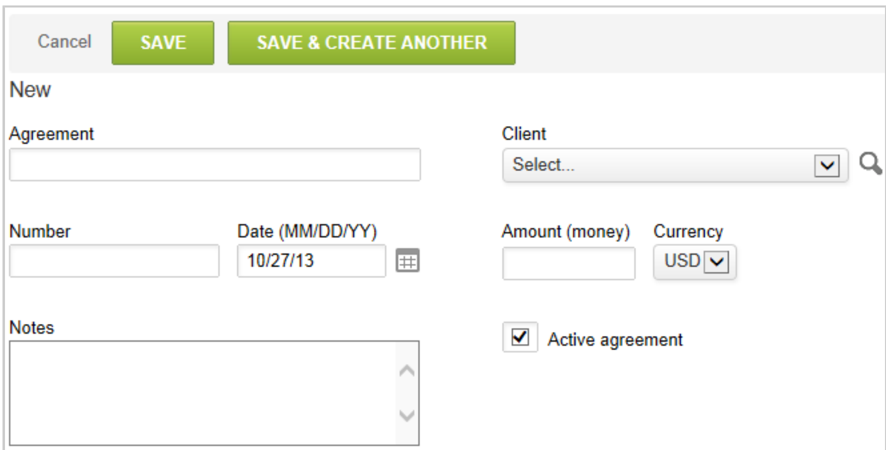
  See Approval Routing under Global Features.

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

- Expense Items

- Credit/Rebill
- Invoice Layouts List View
- Invoice Options
- Service
- Payment Terms
- Other Settings
- Frequently Asked Questions (FAQs)

Agreements

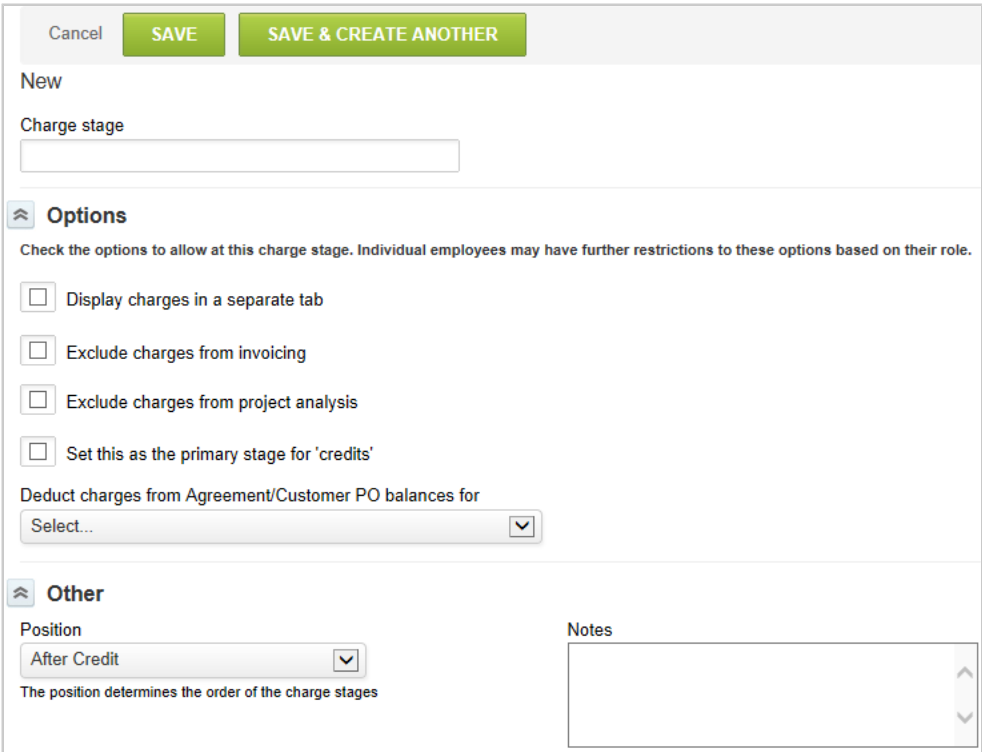


Agreements are contracts or SOWs that are used to track budget balances. Agreements may be associated with a project then assigned to the project billing rules for the tracking of balances. As such, agreements are created for a specific customer. An agreement may encompass multiple projects. An agreement can be used in conjunction with Customer POs, independent of Customer POs, or not at all. Agreements are standard reporting fields and can provide the remaining balance on the agreement and the charges to date. Agreements can be renamed to your company's terminology. See Interface: Terminology.

To create an Agreement:

1. Go to Administration > Application Settings > Invoices > Agreements.
2. Select **New Agreement** from the **Create Button**.
3. Enter the Agreement name and then select the Customer from the drop-down list.
4. Enter the customer's agreement Number specified on the document (if available) as well as the Date it was created.
5. In the Amount (money) field, enter the total value of the agreement and select the Currency if multi-currency has been enabled.
6. Input any Notes for this agreement, if appropriate.
7. Select the check box for **Active agreement**.
8. Click Save.

Charge Stages



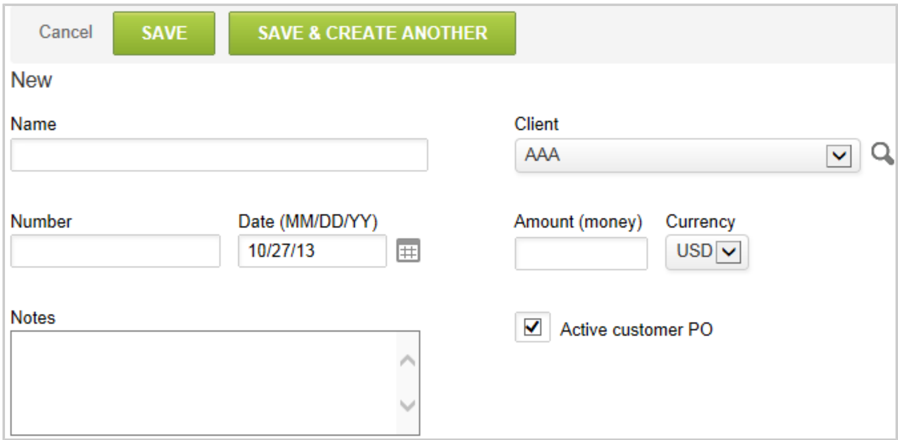
Charge stages separate time and expenses items into different phases or states within the Invoices application. There are two charge stages needed within OpenAir: Open and Billed. You may create any number of charge stages in your environment based on your company's requirements. For example, you may create stages to indicate charges that are billable to the customer (e.g., Billable or Chargeable) or not billable (e.g., Administrative, Pending, or Overage.)

To create a Charge stage:

1. Go to Administration > Application Settings > Invoices > Charge Stages.
2. Select **New Charge stage** from the **Create Button**.
3. Enter the Charge stage name.
4. Next, select the Options for this charge stage:
   - **Display charges in a separate tab —** checking this item displays the charge stage as a separate tab under the Invoices > Charges tab, which only displays the items under this stage
   - **Exclude charges from invoicing —** checking this item prevents charges under this stage from being selected in the invoicing process
   - **Exclude charges from project analysis —** choosing this item prevents charges in this stage from appearing under the Analysis link for projects.
5. Enter Position. Use the drop-down list to indicate the order in which the charge stage appears under the Charges tab.
6. Enter any Notes for further description of the charge stage, if desired.

7. Click Save.

Customer POs



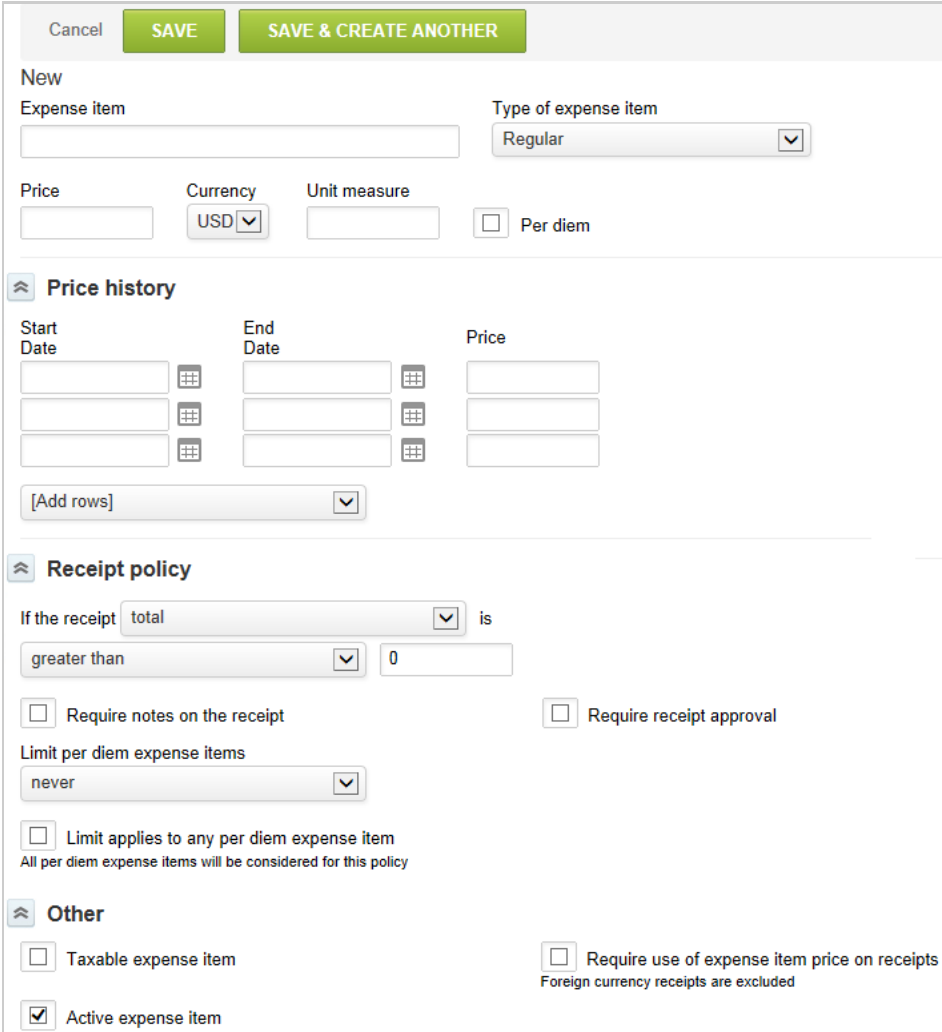
Customer POs are funding documents for projects or purchases. Customer POs may be associated with a project then assigned to the project billing rules for the tracking of balances. There may be one or more POs associated with a project. As such, customer POs are created for a specific customer. A customer PO may encompass multiple projects. A customer PO can be used in conjunction with Agreements, independent of agreements, or not at all. A customer PO can be set on a billing rule, so that charges are charged against a specific Customer PO. to set a Customer PO on the billing rule, you must first associate it with the project record on the project Properties form.

To create a Customer PO:

1. Go to Administration > Application Settings > Invoices > Customer POs.
2. Select **New Customer PO** from the **Create Button**.
3. Enter the Name of the customer PO and then select the Customer from the drop-down list. Enter the customer's PO Number specified on the document (if available) as well as the Date it was created.
4. In the Amount (money) field, enter the total value of the customer PO and select the Currency if multi-currency has been enabled.
5. Input any Notes for this customer PO, if appropriate. Customer POs are a standard reporting field and can provide the remaining balance on the customer PO and the charges incurred to date.
6. Click Save.

Customer POs can be renamed to your company's terminology. See Interface: Terminology.

Expense Items



Expense Items are receipts, tickets, statements or other items that contain costs incurred by the employee and are entered into NetSuite OpenAir expense reports per your company's policies and procedures.

The expense items are classifications or categories of these costs. Some examples are: Airfare, Lodging, Mileage, Business Meals, etc. OpenAir has pre-defined a number of common expense items, but you can modify these and create new items per your company's needs.

Expenses incurred and related to customer projects are often billable to the customer. These expenses are available as charges in the Invoices application if expense receipts are processed by an expense billing rule on the project. Then they can be selected for inclusion on an invoice.

Expense charges are only created by the expense billing rule on the project if the Billable receipt check box has been selected on the individual receipts. However, you may override the billable receipt check box control on the Expense Billing rule directly by unchecking the option to Exclude non-billable receipts. (This option is defaulted as checked during the rule creation).

To create a Expense item:

1. Go to Administration > Application Settings > Invoices > Expense items.

2. Select **New Expense item** from the **Create Button**.
3. Enter the Expense item name and select the Type of expense item (regular or mileage). A regular receipt is the default receipt form when a new expense report is created. A mileage receipt is a slightly modified receipt form allowing for mileage rates.

   Note: Mileage expense items may also be set as a regular receipt type since the form provides the ability to enter a price per unit (in this case $$ per Mile, for example). If you are not using the Vehicle feature that requires the mileage receipt type, you may opt to set up all expense items to the regular receipt type and avoid end-employee confusion during expense entry.

4. Enter a Price for the item (this is generally left blank except for the cases of mileage or per diem), Currency if multi-currency is enabled and the default is not the desired value, a Unit measure (generally for mileage), and indicate whether this is a Per diem item via the check box.
5. The next section in the form relates to Receipt policy, which controls actions based on the individual receipt and expense item entered into an expense report. You are able to enter parameters for the receipt and select whether to require notes or approval based on the settings.
6. For per diem expense items, you are able to choose how to limit their use within OpenAir.
7. Check the Taxable service check box if tax may be charged to the customer for this expense item. The tax rate to be used is controlled through the Invoices application by using tax location values. If you would like the expense item price to be required on the receipt, select the check box.

Credit/Rebill

OpenAir's invoicing functionality enables companies to group multiple charges that should be billed and sent to a customer. Invoices can be sent through an approval process, sent to a customer and subsequently exported to an external accounting system. At times it is necessary to credit and potentially re-bill an invoice that has already been approved, sent to a customer, or has been exported. Currently, if an invoice and corresponding charges have been approved or exported, a credit would need to be applied manually creating negative offsetting charges. New charges would also need to be created manually if the invoice needed to be re-billed.

OpenAir has streamlined the process of crediting an invoice and re-billing associated charges after a credit has been issued. A new Credit/Rebill link is available within an approved timesheet that enables users to either credit, or credit and rebill an invoice. If a user chooses to credit an invoice, a new invoice will be created that contains offsetting charges of the original invoice. If the user then chooses to re-bill, the charges from the original invoice will be available to be placed on a new invoice. Both credit and re-bill invoices will go through the same approval process as the original invoice. Additionally, the History link in the original invoice will indicate whether the invoice has been credited or re-billed, with the corresponding invoice numbers.

To enable the credit and re-bill functionality, contact OpenAir Customer Support.

To Credit an Invoice:

1. Users with the appropriate role privilege navigate to Invoices > Invoices > Approved > [select an approved invoice].
2. Click the “Credit/Rebill” link.
3. Enter any necessary notes and select the option for submission of the credit invoice to either “Yes” or “No.”
4. After all options have been configured, click the “Credit” button. A new invoice will be created containing negative offsetting charges.

Note: Credit invoice charges are designed to balance out the entire original invoice, and then new charges to be invoiced (or modified and then invoiced) are created by pressing **Rebill**.

To Re-bill an Invoice:

1. Select the originally approved invoice that has already been credited.
2. From the "Credit/Rebill" link, click on the "Rebill" button. After the "Rebill" button has been selected, the charges on that invoice will appear in the "Open" charge stage.
3. Place these charges on a new invoice, if desired.

Important: An invoice cannot be re-billed unless the invoice has been credited. After an invoice has been credited, a new re-bill option is now available.

After an invoice has been credited, users cannot edit the charge in the original invoice, and the **Charges** link won't be available. After the original invoice has been rebilled, users cannot delete the original invoice and the credit invoice in the UI. Users would need to set the field **credit_rebill_status** to C on the original invoice to be able to delete the credit invoice. This setting of the field can be done using the Integration Manager tool. After the credit invoice is deleted, users may now edit the original invoice.

Edit or Delete an Invoice Where a Credit and Rebill Has Already Been Applied

1. Create a CSV file and add a column for **ID** and **credit_rebill_status.**
2. Indicate the **internal id** of the **original invoice** (not the credit invoice).
3. Indicate **C** under **credit_rebill_status** column.
4. Save it as **CSV.**
5. Open **Integration Manager.**
6. Map **ID** with **ID** and **credit_rebill_status** with **credit_rebill_status** for **CSV to Invoice.**
7. Run the **Integration Manager** tool.

After doing this, the original invoice's **credit_rebill_status** will become C (Credit Initiated) from R (Re-Bill). Moving it to a state that is not re-bill will allow users to delete the credit invoice. Users may do so by navigating to **[credit invoice] > Properties >** click **Delete**. After deleting the credit invoice, users may now edit the charges within the original invoice and/or delete the original invoice.

Role Settings

There are two new role settings that allow specific roles to either Credit or Re-bill an invoice:

- Rebill invoices
- Credit invoices

Charge Stages

A specific charge stage can be designated at the Administration > Application Settings > Invoices > Charge stages. Within the charge stage edit form, select the option "Set this as the primary stage for 'credits'". If designated, any charge created from the credit invoice will be displayed in this charge stage.

Invoices List View

In the Invoices list view, a new subtab for "Credit/Rebill" is available. This subtab will hold any invoice that has been credited or re-billed. In addition, three new fields can be displayed by clicking on the "Customize list view" link on the upper left corner of the top menu bar. These fields are: "Credit/Rebill - Credit invoice number", "Credit/Rebill - Original invoice number", and "Credit/Rebill - Status". To display these fields, click on them as desired and select "Add selected items." Click OK.

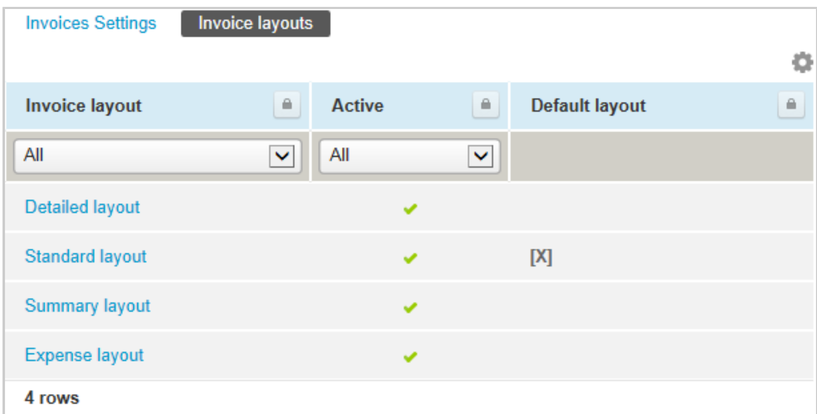
Reporting

Time entry related fields can now be reported on in a charge detail report. These fields can be leveraged to identify the original time entries hours from the resulting charge. To run a charges detail report, navigate to Reports > Detail > Invoices > Charges.

Terminology

The terminology for "Rebill" can be changed. To modify the terminology, navigate to Administration > Global Settings >Display > Terminology.

Invoice Layouts List View



The Invoice Layout sub-tab lets you create and maintain the various invoice formats you require to produce invoices capturing the information desired based on types of projects or customer preferences. You may have multiple invoice layouts and one of those layouts should be selected as your default layout.

The invoice layout is applied when the invoice is created based on the invoice layout setting on the project (Project Properties or Edit Project form). If a layout is not set, the default invoice layout is used. An invoice layout may be changed on a particular invoice by overriding the layout in the Edit Invoice form within the invoice. The layout form is structured into 7 basic parts: Invoice Columns, Invoice Groupings, Combine Charges, Other, Logo Settings, Footer Settings and Adobe Acrobat PDF Setting.

Credit/Rebill Invoice Layout

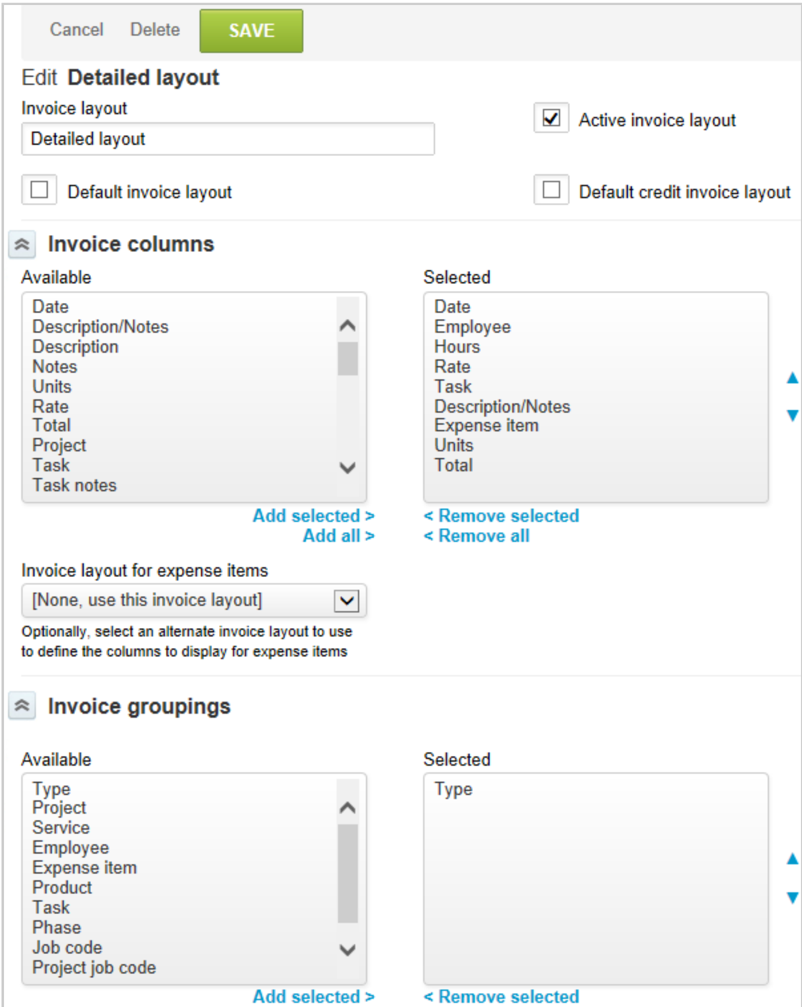
A distinct invoice layout can be configured and designated as the default for credit invoices. To configure the layout, navigate to Administration > Application Settings > Invoices > Invoice layouts. Within the invoice layout edit form, check the option "Default credit invoice layout".

To access, create and modify the Invoice layout:

1. Go to Administration > Application Settings > Invoices > Invoice layouts.
2. Select **New Invoice layout** from the **Create Button**.

The components of the Invoice Layout form follow.

Invoice layout - Display, summary



In the top half of the form, you have the options to designate this layout as the default. Only one invoice layout can be considered the default. The display area enables the selection of specific information related to invoice charges and the order those fields are displayed in the invoice, one value per column.

If you have the internal switch active that enables separate layouts for expenses from other invoice charges such as time or flat rates, you are able to select the invoice layout that controls only the expense formatting of your invoice. If the internal switch is not activated by OpenAir, then you do not see this option in your invoice layout.

The Summary section enables a grouping of values to be performed when displaying the information. It is important to remember that the invoice layout and summary selected does not change any of the invoice charge values, the data is simply formatted according to your specifications. Selecting a group or groups of items enables a subtotaling display of information.

Expense items can be grouped together that are similar as can time entries. The way the information is grouped is based on the options by time period such as day or week, by rate such as combine only like rates, and/or by employee. You may select one or more of the combination options to produce the summarized group as expected.

Expense groups may also be created to group expenses together that are related in some way by your company. Select the create arrow to display the expense group form. You may define as many expense groups as you desire, however each group must have at least 2 expense items. Expense items not included in expense groups are not included on the invoice so it is advisable to set up an 'other' group to capture those expense items that are typically not passed to invoices but may occur in special circumstances.

Invoice layout – Formatting override

A series of options exist to format the information displayed such as the location of project notes (if desired to be on the invoice) and invoice notes (if desired to be on the invoice). You may also select a number of other options such as the date format, number and hours formats, sorting order, additional text, etc.

If you have the terminology override on invoice layouts option activated (internal switch by OpenAir), then you have the ability to override the names of all fields that could appear on the invoice including items such as Tax, Total, Hours, etc. If you choose not to enter any values, the default system value is used. If you choose to enter a value, then invoices using the layout will have the fields renamed. This option is very helpful if you need to have invoices in another language or are using fields to display information different than what the field name is called by OpenAir. Example: redefine GST to Mwst Tax for country specific invoices. To activate the terminology override on invoice layouts option, Creating a Support Case.

Two major sorting options are available to control the order in which charges are displayed, Primary charge sort order and Secondary charge sort order. Select the options that sort your invoices properly for each format.

> **Important:** Not all sorting values are available for display on the invoice. This may lead to confusion regarding the sorting of data on the final invoice, so use the sorting options carefully.

Invoice layout — Set the sender address (From)

By default, OpenAir uses the email address of the employee sending the invoice in the From address of the invoice email. For example, if an employee goes to Invoices > [select an invoice] > Send tab and clicks **Send**, the invoice email will show as being sent from this employee's email address.

To override the sender email address for your invoice email, set **"From" email address for invoices** to any email address on the invoice layout. All invoice email with this layout will be sent using the sender address set for the layout.

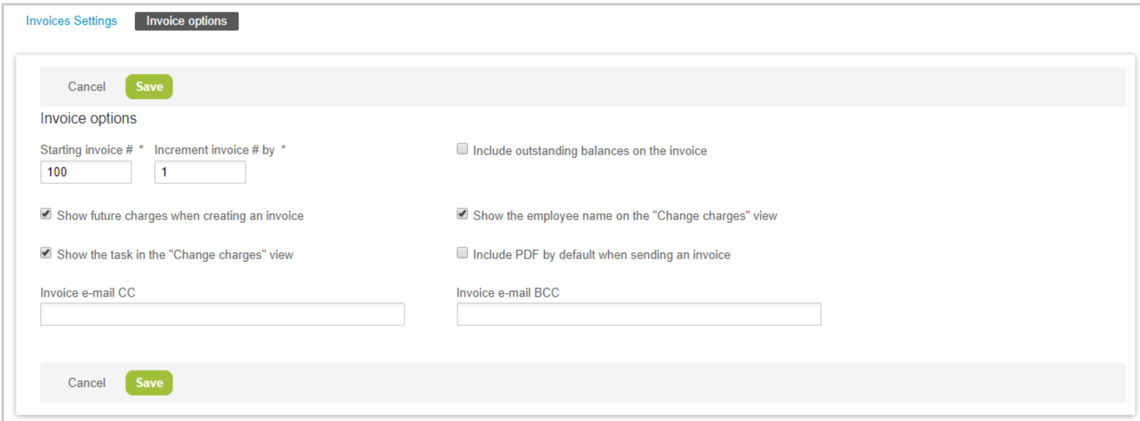
You can use this together with **Do not set the From: address to the current employee's email address** option in Administration > Global Settings > Display > Email Settings to use only the sender email address set on the invoice layout for all invoice email. See Email Settings.

Invoice layout — margins, remit to

A remit to field lets you override the company address from which you are sending the invoice. This is helpful if you have more than one office invoicing customers and receiving payments. Since the office address is set in the invoice layout, you need to define invoice layouts per office and make sure they use only their layouts to get the appropriate remit to address displayed. There is no ability to restrict who can see what invoice layouts so training is key.

At the bottom of the invoice layout is a control of the invoice margins, both top and bottom. If you opted to allow the company logo to appear full size, the invoice top margin is ignored should your logo require more space. You have the option to load an override logo which is helpful in the case of invoicing by subsidiaries within your organization that may use unique logos when invoicing your customer base. The title of the invoice may also be overridden. This lets you specify a layout that renames the invoice to be 'Credit Memo' for example or any terminology (in any language) you desire.

Invoice Options



High level Invoice options exist that apply globally to all of your invoices. Setting the starting invoice # and the increment by # value should only be set one time in your account and not adjusted to maintain consistent invoice numbering.

To access and modify the Invoice options:

1. Go to Administration > Application Settings > Invoices > Invoice options.
2. Set the Starting invoice # and the number invoices increment by. The starting number defaults to 100 and the incremental invoice # defaults by 1. You may change this as needed in your company. However, when set, we recommend that you do not change it.
3. Select the check box to **Include outstanding balances on the invoice** if you would like to display any outstanding balances to your customers. This is controlled here and not with the invoice layout.
4. Select the check box to **Show future charges when creating an invoice** if you have set up invoice charges for future billing manually and want to include these in the invoice for advanced billing.
5. Select the check box to **Show the employee name on the "Change charges" view** if you allow employees to change the charges by removing or adding them and optionally editing the charge.
6. Select the check box to **Show the task in the "Change charges" view** if you want to display the task in the charges view.
7. Select the check box to **Include PDF by default when sending an invoice** if you want the **Include PDF invoice as attachment** option on the Invoice > Send form to be selected by default. Users will be able to uncheck this option if they do not want to include the invoice as a PDF attachment.

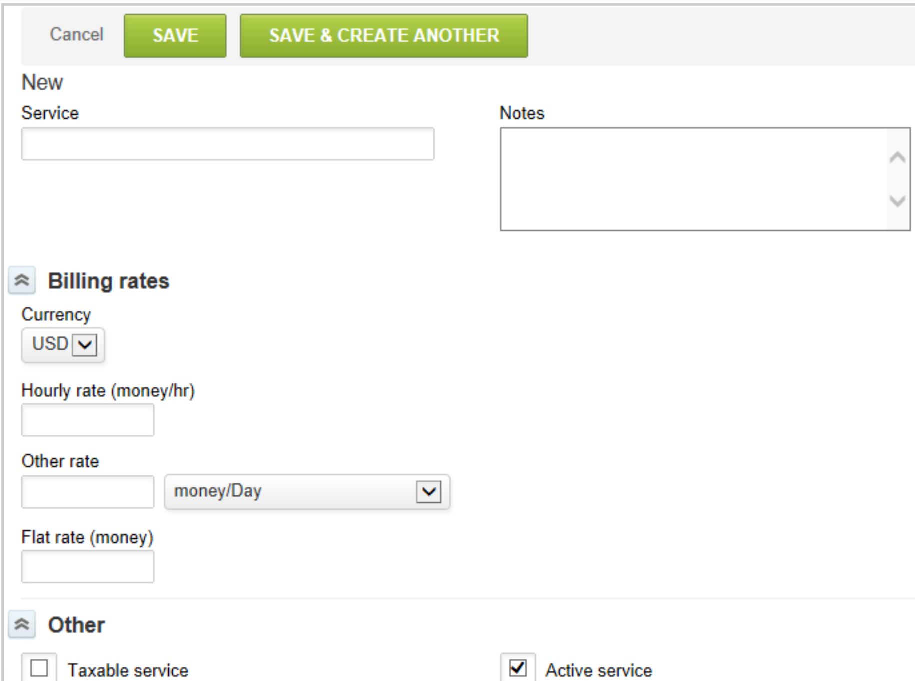
   > **Note:** Attached PDF Invoice files are named 'invoice_<*invoice number*>.pdf'. For example, Invoice number 1358 will be sent with the file 'invoice_1358.pdf' in attachment.

8. Enter an email address in the **Invoice email Bcc** text box if you want to copy a recipient privately into all invoice email using Blind carbon copy. On the Invoice > Send form, the **Invoice email Bcc** is read-only and visible only if filled in the Invoice Options settings.
9. Enter an email address in the **Invoice email Cc** text box if you want to set a default recipient to be included into invoice email using Carbon copy. The **Invoice email Cc** can be overwritten by the user sending the invoice on the Invoice > Send form.

10. Click Save.

Tip: You can set a sender address for your invoice email by using **"From" email address for invoices** on your invoice layouts. See Invoice layout — Set the sender address (From).

Service



OpenAir provides a number of methods you can use to charge or invoice a customer. One of these methods is Services. You use services when you would like to designate and bill for specific services offered to a customer.

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

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

One example of a Service would be for monthly application support. You would charge a fixed fee amount per month to the customer regardless of the amount of time incurred by resources providing the support. Another example could be programming fees where the service is provided on an as needed basis. You would charge the customer at an hourly rate or on a per-day basis when assistance is required.

You are able to select the service as an option in the invoice layout. This defines the specific work provided to the customer.

To create a Service:

1. Go to Administration > Application Settings > Invoices > Services.
2. Select **New Service** from the **Create Button**.

3. Enter the Service name. Type notes related to this service.
4. Under Billing rates, select the Currency if you are using multi-currency in your environment. Choose how you would like to charge for this service: Hourly rate, Other rate (specified amount per time period), or Flat rate (for the entire service-fixed fee).

   > **Note:** You do not have to complete the billing rates section unless you have chosen to get billing rate from either Services or Services-Customer. See Billing Rates.

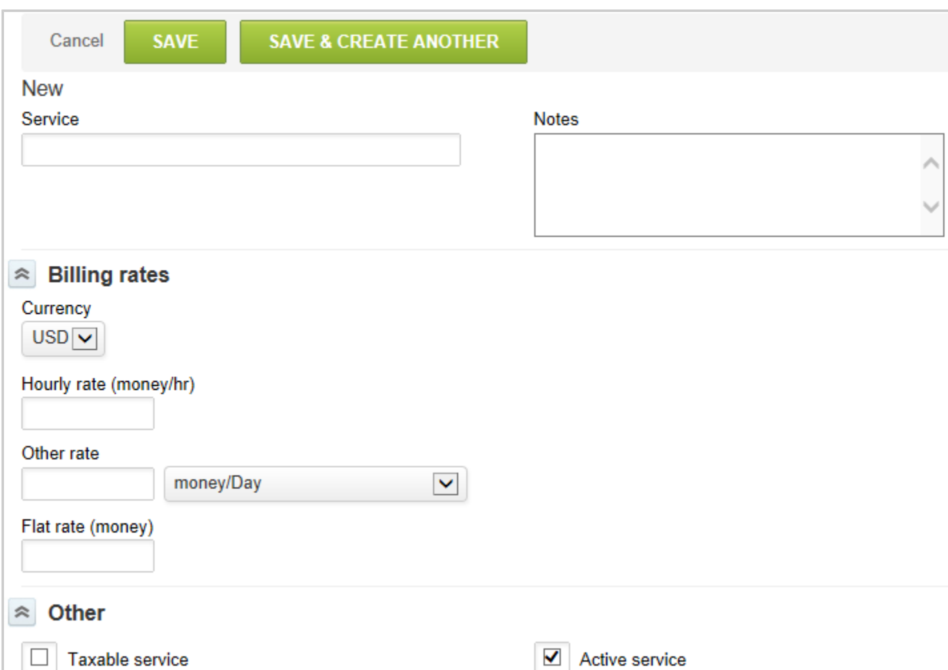
5. Optionally, you may choose a cost center for the service if your company has enabled using Cost Centers and has chosen Services as a Selected Item. See Cost Centers.
6. You may also enter text to be used on proposals in the Opportunities application, if desired.
7. Select the check box for **Taxable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

Frequently Asked Questions (FAQs)

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

If your company provides standard types of services to customers, you may want to create services in your account. They can be used for providing a standard description of the work being performed and are useful for financial reporting, such as revenue by type of service delivered. Since services are carried onto invoice charges, they are available to display on invoices to identify the type of work completed for your customers. Services are “sticky” values that remain associated with time entries and can be used in billing/recognition rule setup. This can provide a wide variety of reporting options using timesheet hours and billing/revenue monetary values.

Payment Terms



Payment Terms are the conditions, generally the timeframe, under which an invoice is expected to be paid by the purchaser of the goods and/or services. Common terms are: Upon Receipt, Net 30 days and

Net 45 days. Any number of payment terms may be created per your company's policies. Generally these terms are specified in contracts or master agreements between the provider and the customer.

To create Payment terms:

1. Go to Administration > Application Settings > Invoices > Payment terms.
2. Select **New Payment terms** from the **Create Button**.
3. Enter the Payment terms name. There is a standard aging report OpenAir provides. In order for the aging function to work properly, the payment terms must be input in the form of “Net#”.
4. Type any Notes, if desired.
5. If this payment term is the standard used for your company, select the Default payment terms check box. You may also specify the payment terms on an individual customer basis.
6. Click Save.

After you have created payment terms, you can select them on the Customers form. Go to Customers and select a customer. Click the Billing information link. Select the Payment terms from the drop-down list. The payment terms for a customer override the default set in the payment terms form. See Customer Billing Information.

Other Settings

The Invoices application has many configurable parts including add-on functionality and interaction with how you are managing your projects.

To access the Invoices Other settings:

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

Disable editing of invoiced charges: Charges may be edited within the Invoices application. This ability is controlled by application role settings. By default, a charge that has been included on an open invoice may also be edited directly within the invoice via the **Change charges** link. Activation of this feature disables the ability to edit charges within an invoice. Therefore, to edit charges on an invoice, all charges must be removed from the invoice first, modified, then reapplied to the invoice as appropriate using the **Change charges** link within the invoice.

Disable editing of exported invoices: Charges may be edited within the Invoices application. By default, a charge that is included in an invoice may also be edited directly within the invoice via the **Change charges** link. If you are exporting invoices from OpenAir for upload or integration with an accounting system, an export flag is set for invoices that have been exported. This is how OpenAir tracks what new invoices must be exported each time the export is run. Activation of this feature disables the ability to edit charges on an invoice that has been exported.

To edit charges, the invoice must be unexported and then unapproved (if it has already been approved) to remove the desired charges from the invoice. Charges may be modified and reapplied to the invoice using the **Change charges** link within the invoice. The invoice can now be exported again whenever the next export is scheduled to be run.

> **Important:** If you are interfacing invoices with another system, the invoice in the other system must be deleted if the invoice has been unexported within OpenAir. This is to avoid duplicate invoice creation in the other system when the OpenAir invoices are exported again.

Allow project over-ride of billing/shipping/sold to contact: If this option is not selected, then the identified billing contacts for the customer are available to be set on the invoice itself. With this option checked, a field displays on the project form allowing a specific billing contact to be associated with the project. This option is useful if you are creating separate invoices per project.

One project per invoice: If this option is not selected, then invoices can be created at the customer level and include billing charges for multiple projects. When using the Create multiple invoices option in the Invoices application, you still have the option to check invoice creation by project or employee. If this option is selected, the system defaults to by project invoice creation for individual invoices as well as multiple invoice creation. You may still chose to create invoices by employee in the multiple invoice create option, but if the one project per invoice option is enabled, then the invoices are created per employee, per project.

Enable shipping contacts: By default, contacts created in OpenAir can be associated with an employee as a general contact or identified as a billing contact. Enabling a shipping contact provides an associated field on the Create contact form to identify whether the contact can be used as a shipping contact.

Require a description on charges: When creating an invoice charge within the Invoices application, the description field is left blank by default. This option requires some type of entry into the description field, most likely due to the invoice layouts displaying the description field. If you create charges from Billing Rules on projects, the charge description can be set via the billing rule to ensure the value is always populated. Setting this option does not make the charge description field on billing rules a required field. Therefore, you still need to ensure the charge description field is entered properly.

Require a service on charges: When creating an invoice charge within the Invoices application, the Service field by default is left blank. This option requires a selection of a service value. Services may drive an integration with an accounting package within your environment, which makes setting the service field critical.

Other reasons why a service would be required include a display of the service on invoice layouts or the use of the service to capture project-related metrics and categories for reporting. If you are creating charges from billing rules on projects, the service drop-down list can be set in the billing rule to ensure the value is always populated. Enabling **Require a service on charges** does not make the service field on billing rules a required field. This is a separate setting within the project options area that is recommended should you decide to activate the service on charges is required option for invoices.

Sort numerically when sorting the invoice list by invoice number: Invoices are assigned a number using the Invoice options form under Invoices Settings. Each customer, however, may have a specific invoice prefix and it could be alphabetic. Activating the sort numerically setting ignores the invoice prefix values and displays invoices in the order of the number assignment when you click on the Invoice # column header.

Invoices tab defaults to a list of: Sets the default landing page for the Invoices application to the Invoice tab rather than Charges tab.

Frequently Asked Questions (FAQs)

I have entered charges for future billing manually but cannot create an invoice and include these charges.

The charges dates may be in the future and the Invoice options do not allow to include future charges when creating an invoice.

By default, if you entered charges manually, you can create an invoice and include open charges as long as the dates set for these charges are not in the future.

If you want users to create invoices for advanced billing and include charges with dates in the future, you need to select **Show future charges when creating an invoice** in the Invoices options. If this option is not enabled, users will need to wait until the date indicated on an open charge to create an invoice and include this charge. See Invoice Options.

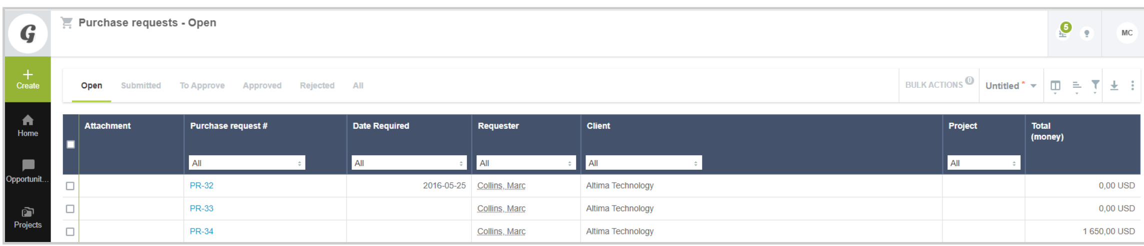
Purchases

Overview

The Purchases application within OpenAir provides the ability to create a process flow from a purchase request to fulfillment and receipt, and enables the tracking of purchases made within your company.

- Employees with the proper permissions can create purchase requests for goods and services (i.e., Products) which may then go through an approval process.
- Approved requests may then be turned into purchase orders (POs) by purchasers which are sent to vendors for fulfillment.

Records that OpenAir requires for the Purchases application are Vendors, Products, and Purchasers (for PO creation) as well as the establishment of at least one record in the following when using the full purchases functionality: Accounts payable locations, Carriers, F.O.B. locations, Receiving locations, and Shipping terms.



> **Note:** Purchase items from purchase orders are associated to projects at the project level or the task level. They appear in the project budget under Purchases. Purchase items billing rules can be used to create charges and project billing transactions based on the purchase items. These charges can then be included when creating invoices. See Billing under Projects.
>
> The Purchases application is designed to facilitate the process flow from purchase requests to fulfillment and receipt. It does not support management of vendor records, bills, payments, records or credits. An external accounting system or the OpenAir/NetSuite integration may be used for this functionality.

For more details, see the following sections:

- Accounts Payable Locations
- Carriers
- F.O.B Locations
- Manufacturers
- Purchase Order Layout
- Products
- Approval Processes

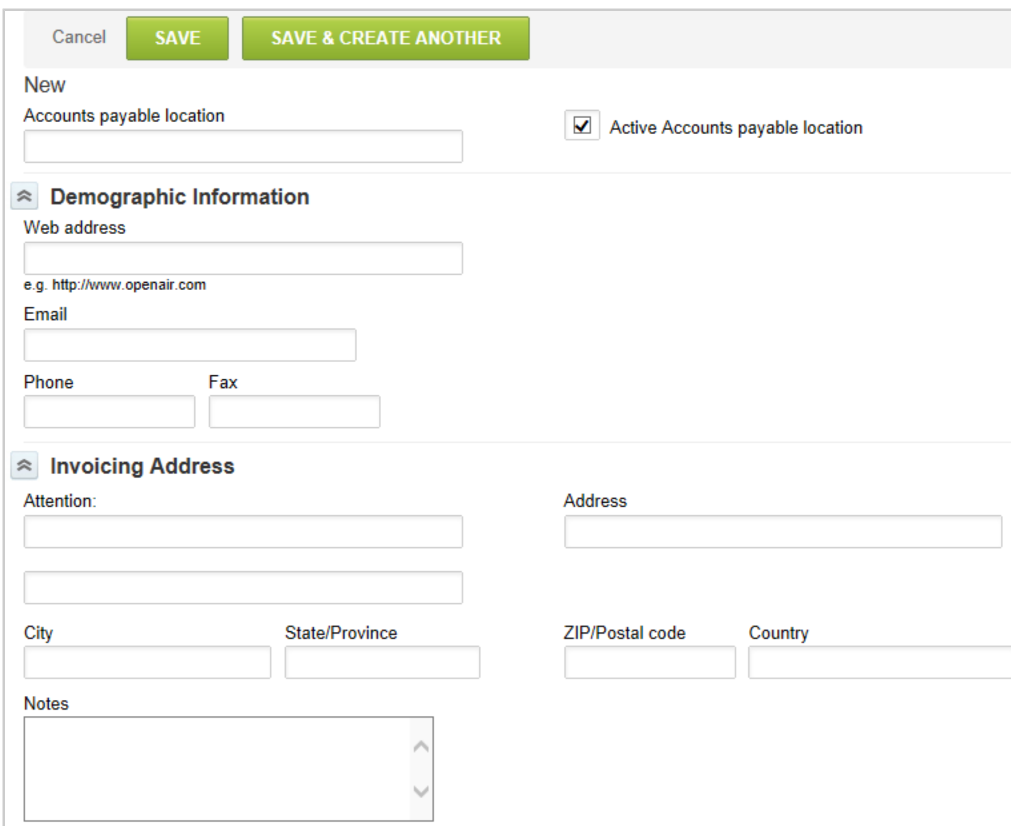
  See Approval Routing under Global Features.

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

- Purchase request layout
- Purchasers
- Vendors
- Receiving Locations
- Shipping Terms
- Notifications

  See Notifications under Global Features.
- Other Settings

Accounts Payable Locations

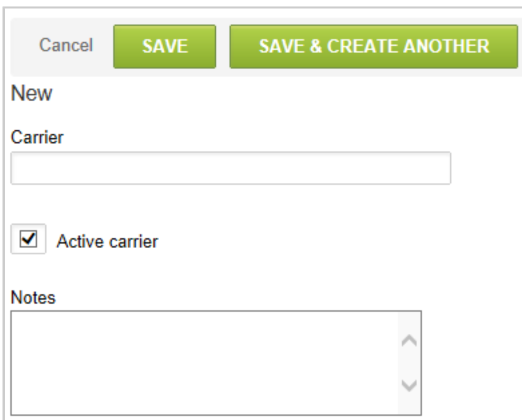


Accounts payable locations are for your company's billing addresses. Your company may have multiple accounts payable addresses, which can be each location, a regional office, or a shared services facility. Accounts payable locations are only available in the Purchases application. When created, you can choose the appropriate accounts payable location when creating a PO so that the vendor is aware of the correct billing address when invoicing for this purchase.

To create an Accounts payable location:

1. Go to Administration > Application Settings > Purchases > Accounts payable locations.
2. Select **New Accounts payable location** from the **Create Button**.
3. Enter the Accounts payable location name (required), the Demographic and Invoicing Address information (most critical).
4. Add Notes to include specific data regarding this location such as products and vendors to be used with this location.
5. Click Save.

Carriers

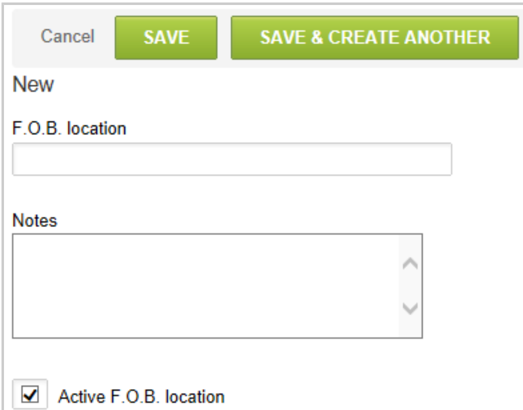


Carriers are the organizations that transport the purchases you order from your vendors to your company locations. You may want to specify the carrier you would like your vendor to use when shipping your purchases. The preferred carrier can be entered when creating POs. Frequently, you may have special arrangements with certain carriers. The use of carriers is only available in the Purchases application.

To create a Carrier:

1. Go to Administration > Application Settings > Purchases > Carriers.
2. Select **New Carrier** from the **Create Button**.
3. Enter the Carrier name and any relevant Notes regarding this carrier such as contact information and account number.
4. Click Save.

F.O.B Locations



F.O.B. means Freight On Board. F.O.B. locations are an indication of which party, purchaser or vendor, is responsible for the shipping and loading costs. It may also refer to where the liability for damage goods resides.

In North America, the locations generally used are FOB Origin or FOB Destination.

F.O.B. Origin — means the purchaser pays for the shipping costs and takes responsibility (liability) for the purchase when it leaves the vendor's location.

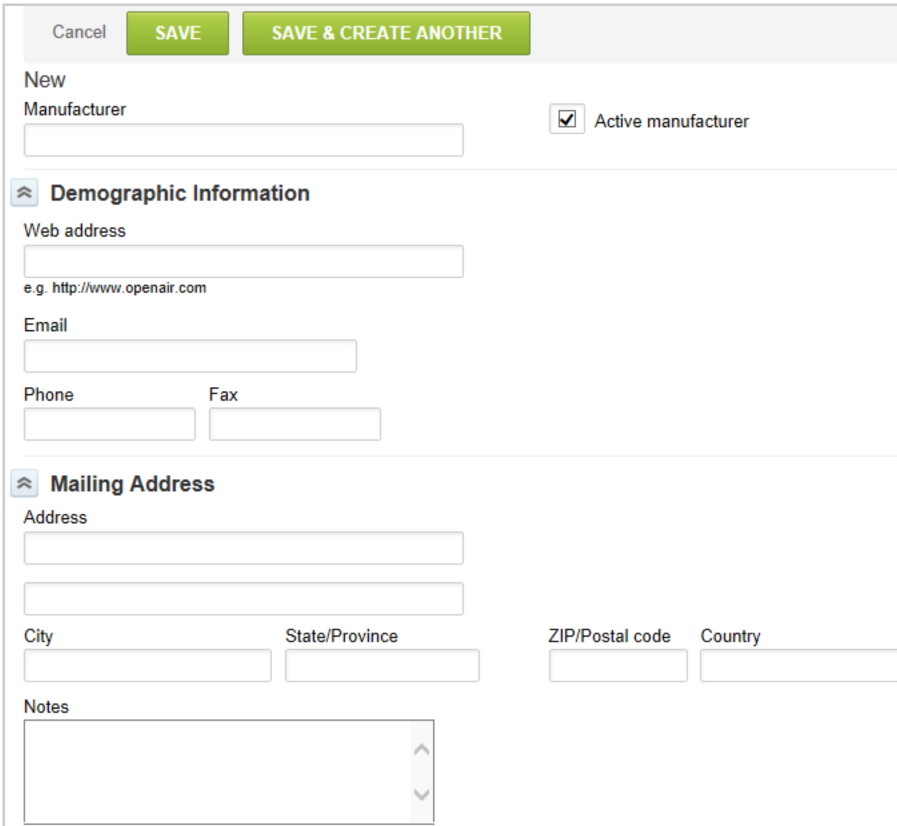
F.O.B. Destination — is the opposite, where the vendor is responsible for costs and liability until the purchase reaches the purchaser's facility.

You may also create F.O.B. locations with specific locations (e.g., F.O.B. London) or other conditions based on your company's needs. Ensure there is a clear definition on what each entry represents by entering notes as you set up the F.O.B. Location.

To create a F.O.B. location:

1. Go to Administration > Application Settings > Purchases > F.O.B. locations.
2. Select **New F.O.B. location** from the **Create Button**.
3. Enter the F.O.B. location name and any Notes, if desired.
4. Click Save.

Manufacturers



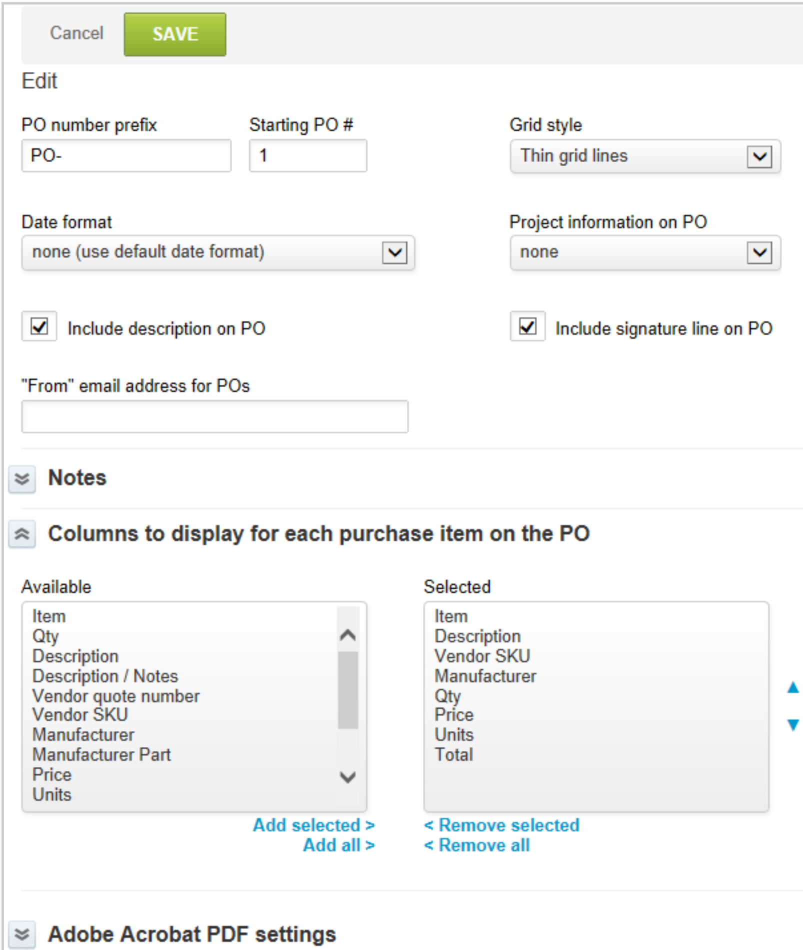
Establish manufacturers so that you can associate them with products to ensure the products are purchased from the manufacturers your company selects. An example would be the purchase of a cell phone from AT&T or Verizon. By indicating the manufacturer on the purchase order (PO) or the purchase request, you ensure the cell phone is purchased from AT&T or Verizon.

Manufacturers is a feature that is only available in the Purchases application, however, it is not a required record in the Purchases application.

To create a Manufacturer:

1. Go to Administration > Application Settings > Purchases > Manufacturers.
2. Select **New Manufacturer** from the **Create Button**.
3. Enter the Manufacturer name and the Demographic Information.
4. The next section is for the Mailing Address and Notes. The demographic, mailing address information and notes are not required to use the manufacturers feature.
5. Click Save.

Purchase Order Layout



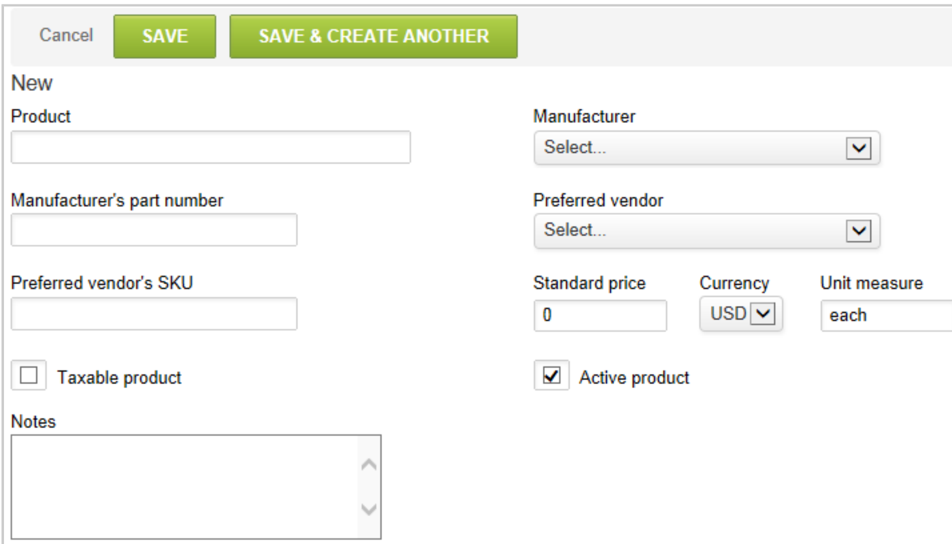
You can tailor the Purchase orders to meet your company's needs. Since this report may be emailed or mailed to vendors outside of NetSuite OpenAir, the Purchase order layout should clearly communicate your purchasing requirements. You are able to select the prefix and starting PO number, Grid style, and Date format. These settings determine the numbering of the created POs and the basic style of the PO report.

To access and modify the Purchase order layout:

1. Go to Administration > Application Settings > Purchases > Purchase order layout.
2. You may choose to include project information such as the Project name or the Customer : Project, if desired, by selecting from the drop-down list.
3. Select the check box to **Include description on PO** and the check box to **Include description on PO** if desired.
4. Type information in the **"From" email address for POs** if you would like that added.
5. A Notes field is available to be displayed on the PO and may be positioned in the header or footer of the form. The notes displayed are a combination of notes entered directly on the PO and static text that may be entered into the Additional notes field in the PO layout. An example of static text may be: All inquiries should be directed to the Accounts Payable Department at xxx-xxx-xxxx.
6. Select the **Columns to display for each purchase item on the PO** from the Available Columns and move them to the Selected Columns.

7. Choose the Adobe Acrobat PDF settings you would like to use in your environment. We recommend that you test a printout of a sample PO when the PDF settings are in place to ensure the page layout and margins are set correctly.
8. Click Save.

Products



Products are items you purchase from vendors. A product must exist to use the Purchase request or PO functionality within the Purchases application. Products may also be rebilled or invoiced to your customer and therefore need to be available as a type of billing rule on projects and also as a revenue recognition rule in the Projects application. They also may be used as a invoice charges in the Invoices application.

When you set up products in OpenAir, consider your company's requirements to distinguish between specific products. You may choose to set up generic products like cell phones, travel, or computer. Or, you may choose to be more specific on the type of products you allow to be purchased for your company such as Blackberry 8830 or Dell Inspirion E1705. To allow more flexibility and less maintenance, setting up products that are more generic enables accurate data capture while not restricting the company from evolving as new products are approved and old products are retired.

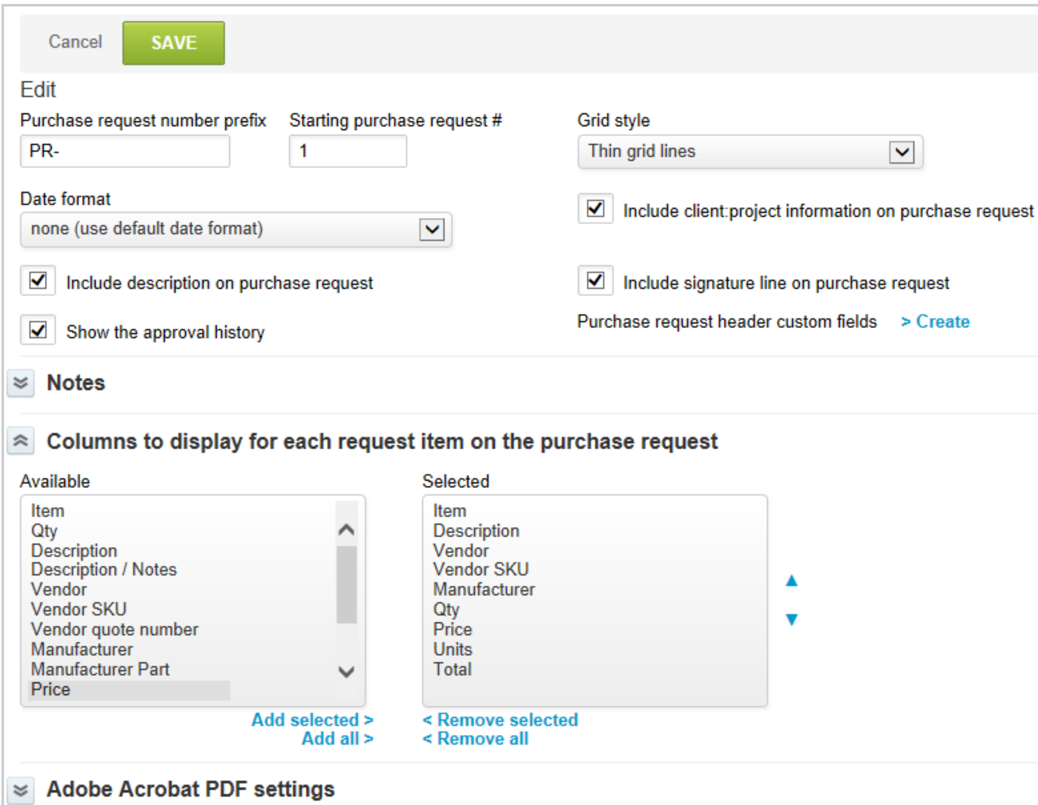
If you are using the Purchases application to also procure vendor services, you also need to set up products related to services provided such as Consulting, Programming, and Web Design.

To set up a Product:

1. Go to Administration > Application Settings > Purchases > Products.
2. Select **New Product** from the **Create Button**.
3. Enter the Product name. You can choose a Manufacturer from the drop-down list and identify the Manufacture's part number in the fields provided.
4. Choose the Preferred vendor (if available), the Preferred vendor's SKU number, Standard price, Currency if using multi-currency, and Unit measure.
5. Select the check box if this is a **Taxable product**.
6. Select the check box to indicate this is an **Active product**.
7. Add any Notes on this product, if desired. Click Save.

Note: Only the name is required to create a product. Any other fields entered on the product record auto-populate related fields on a purchase request and/or purchase order in the Purchases application.

Purchase request layout



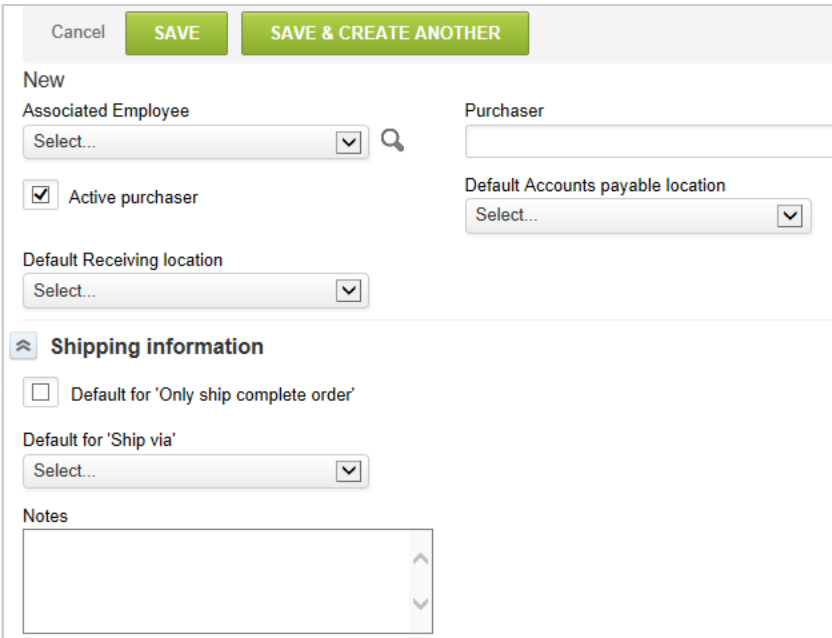
You can use the Purchase Request layout form to design purchase requests that are specific to your company's needs. Since this report form may be routed for review and approval internally, the layout should clearly communicate your purchasing needs. You are able to select the prefix and starting Purchase Request number, Grid style, and Date format. These settings determine the numbering sequence of created Purchase requests and the basic style of the report.

To access and modify the Purchase request layout:

1. Go to Administration > Application Settings > Purchases > Purchase request layout.
2. A series of data inclusion options are available:
   - Include customer:project information on purchase request
   - Include description on purchase request
   - Include signature line on purchase request
   - Show the approval history
3. The Header or Footer of the Purchase Request may display purchase request notes and the customer purchase request notes. You can also add additional notes.

4. Select Columns to display for each request item on the purchase request. Move items from the Available list and move them to the Selected list.
5. Choose the Adobe Acrobat PDF settings you would like to use in your environment. We recommend that you test a printout of a sample Purchase Request when the PDF settings are in place to ensure the page layout and margins are set correctly.
6. Click Save.

Purchasers



You must set up a Purchaser record to be able to use the Purchases application to create POs. The purchaser record stores the default purchasing preferences of each employee. For example, an employee who is in charge of creating POs and delivering them to vendors for a particular office often uses the same accounts payable and receiving information on each PO. By creating the purchaser and associating it with an employee, you set the purchasing preferences beforehand so the employees do not have to enter this information each time they create a PO.

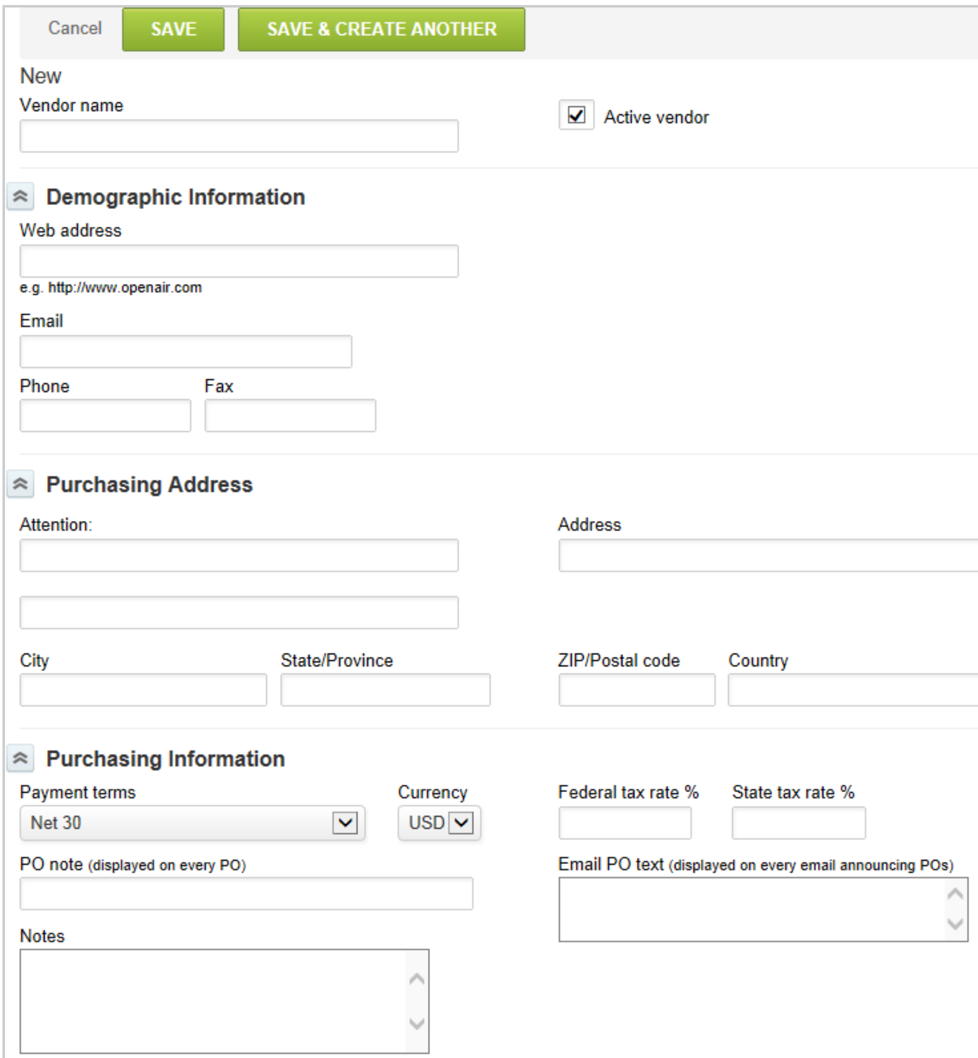
A employee cannot create POs or POs by vendor unless the employee has an associated Purchaser record. Depending on role permissions, an employee can create Short Order POs without being designated as a Purchaser.

To create a Purchaser:

1. Go to Administration > Application Settings > Purchases > Purchasers.
2. Select **New Purchaser** from the **Create Button**.
3. Select the Associated employee from the drop-down list of account employees.
4. Enter a name for the Purchaser.
5. Choose the **Default Accounts payable location** and the **Default Receiving location** for this employee from the drop-down lists.
6. Complete shipping information. Select the check box for **Default for 'Only ship complete order'**. Otherwise, you allow for multiple shipments.

7. If you would like to select a default carrier for this purchaser, select a carrier from the **Default for 'Ship via'** from the drop-down list.
8. Notes may be added, if desired.
9. Click Save.

Vendors



Vendors play an important role for companies that use the Purchases application in OpenAir. A vendor is someone from which you purchase services or products. Purchase orders (POs) are issued to vendors and sent via OpenAir provided the necessary information has been entered on the vendor record.

Vendors are an optional feature in the Expenses application and can be entered on receipts, if your OpenAir account is configured to use vendors on receipts. The entry of Vendors is separate from customers. So if you provide services to a company but also purchase services/products from them, then you must create both a customer and a vendor record. See Customers.

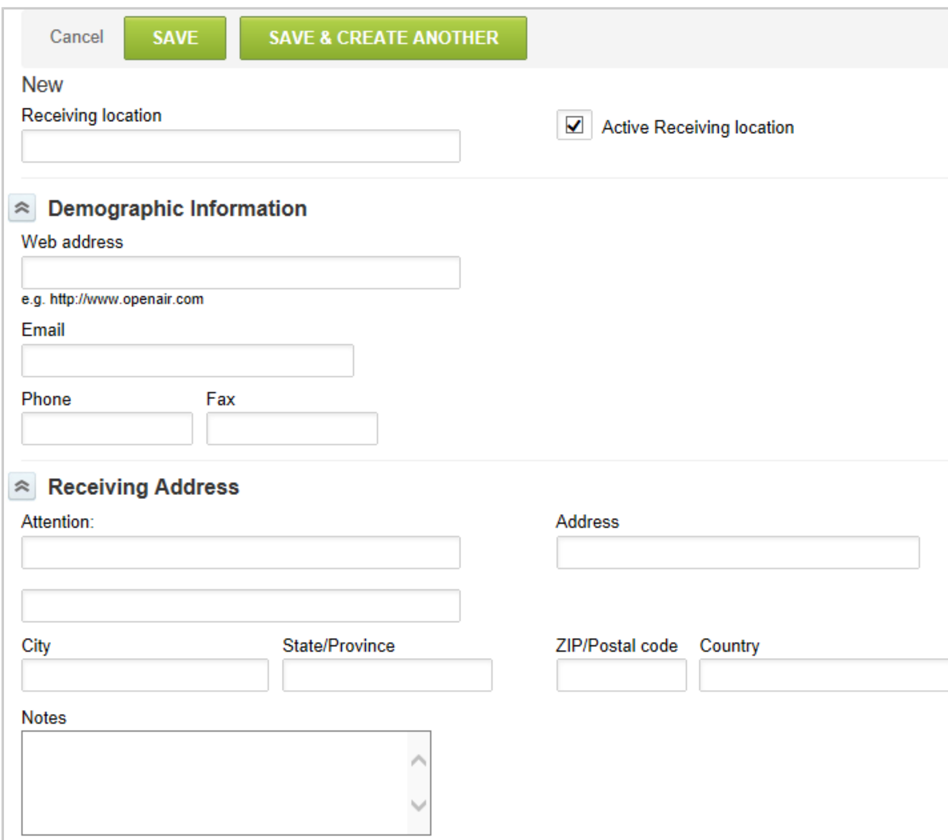
To create a Vendor:

1. Go to Administration > Application Settings > Purchases > Vendors.
2. Select **New Vendor** from the **Create Button**.
3. Enter the Vendor name and select the check box to indicate this is an **Active vendor**.
4. Enter Demographic Information as completely as possible.
5. Under the Purchasing Address, enter the full address of the vendor and person/department to be notified. This information is necessary when sending POs that have been created in the Purchases application to the vendor.
6. Enter the additional Purchasing Information. This includes Payment terms (see Payment Terms under Invoices Settings), Currency if using multi-currency, a PO note that is displayed on every PO for this vendor, Email PO text to be used on POs sent by email, and any notes if required.

   > **Note:** The purchasing address and other information are optional if you are not using the Purchases application.

7. Click Save.

Receiving Locations



Receiving locations are for your company's shipping addresses. Your company may have multiple addresses it ships to, which could be each location/plant, a regional distribution center, or possibly a third party facility such as a manufacturing plant receiving parts.

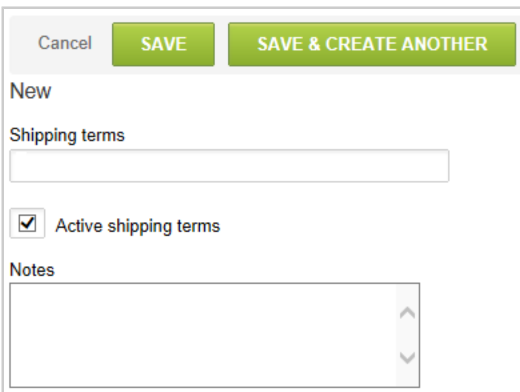
Receiving locations are distinct from accounts payable locations since the purchase may be shipped to a plant location while the invoice should be sent to the regional office for accounts payable processing.

Receiving locations are only available in the Purchases application. When created, you can choose the appropriate receiving location when creating the PO so that the vendor can ship the purchase to the correct shipping address.

To create a Receiving location:

1. Go to Administration > Application Settings > Purchases > Receiving locations.
2. Select **New Receiving location** from the **Create Button**.
3. Enter the Receiving location name (required), the Demographic Information and Receiving Address information (most critical).
4. Add Notes, if desired.
5. Click Save.

Shipping Terms



You can enter shipping terms on a PO to provide information for your purchases with a vendor. Shipping terms are only available in the Purchases application and are generally determined by the contract between your company and the vendor. Shipping terms could include who is responsible for expenses involved in shipment, who owns goods at a particular point, and who is responsible for paying damage to goods. Examples are Paid by Vendor and Collect on Delivery or C.O.D.

To set up Shipping terms:

1. Go to Administration > Application Settings > Purchases > Shipping terms.
2. Select **New Shipping terms** from the **Create Button**.
3. Enter the Shipping terms name. This displays on the PO.
4. Type any additional information in Notes.
5. Click Save.

Other Settings

There are several other settings available in the Purchases application.

To access the Purchases Other settings:

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

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

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

On purchase requests, show only Customers and projects with open tasks assigned to the employee: This option only permits employees that have been assigned to open tasks on active Customer : Project to create a purchase request.

Enable by default the "Automatically track payability with fulfillment" option for new POs: If you select this option, any PO item is indicated as payable when the item has been fulfilled. You may override the setting on a specific PO via the Edit PO form.

Allow modification of the notes field on an approved PO: When a PO has been approved, all fields are locked from changes. By enabling this option, the Notes field can be modified after the PO has been approved.

Allow PO submission even if there are purchase items with no costs assigned: This option enables a PO to be submitted for approval without having a defined cost indicated on the purchase item. Normally, purchase items and products entered on purchase requests have a standard price or cost assigned to them.

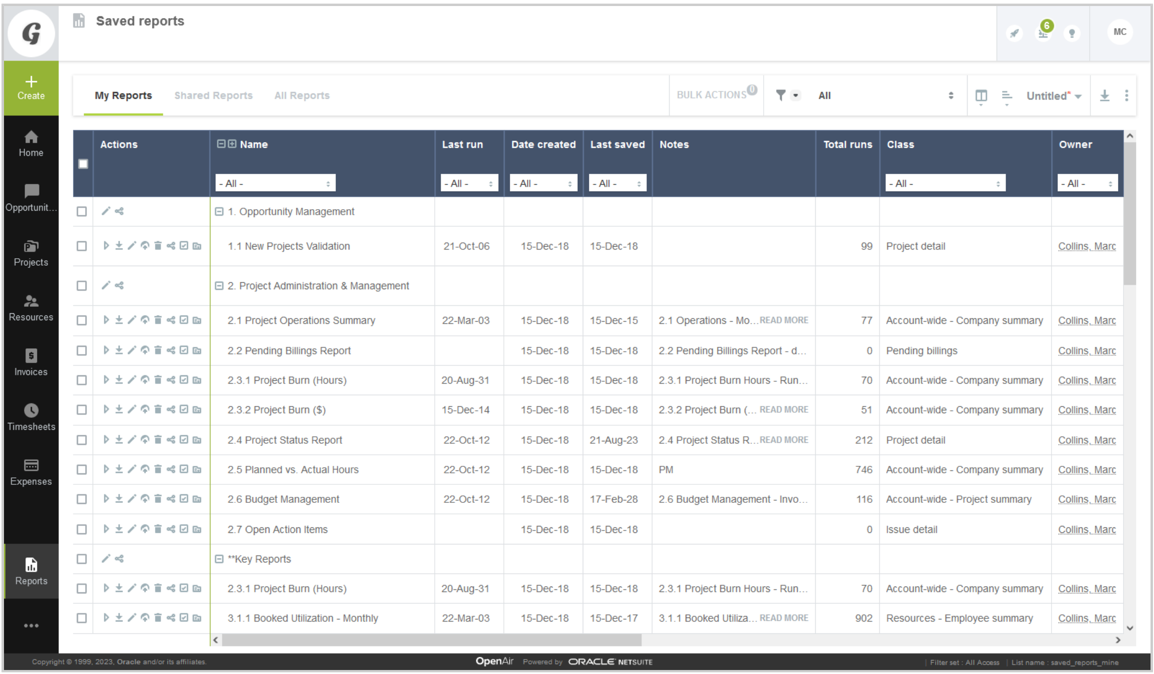
Do not auto-populate description field on request items: The description field is automatically populated from the description on the products. Selecting this option does not use the item description and requires the description to be entered on all purchase items.

Duplicate request item attachments to their respective purchase items when creating POs: Attachments to purchase items are automatically duplicated when creating new POs when this option is selected.

Enable the ability to create quick PO items. These are purchase items for purchases made without an NetSuite OpenAir PO: This feature lets you create PO items when purchases have been made without using purchase requests or POs within OpenAir. Generally you would create purchase requests or POs from products that have already been defined in OpenAir. Quick POs are technically purchase items, and are not the standard purchase order record.

Reports

Overview



The Reports application provides you with a way to download and report on information from OpenAir. It consists of five main tabs and each has its own set of configuration options. The types of Reports are listed below:

- Summary
- Detail
- Advanced
- Drill Down
- Saved reports

To manage reports, see Reports Status.

To view company report-related switches in Global Settings, see Reporting Options.

The Report Management and Editor optional feature changes the user interface for all except advanced reports and streamlines the way you work with reports. For information about the Report Management and Editor Interface features, see OpenAir User Guide.

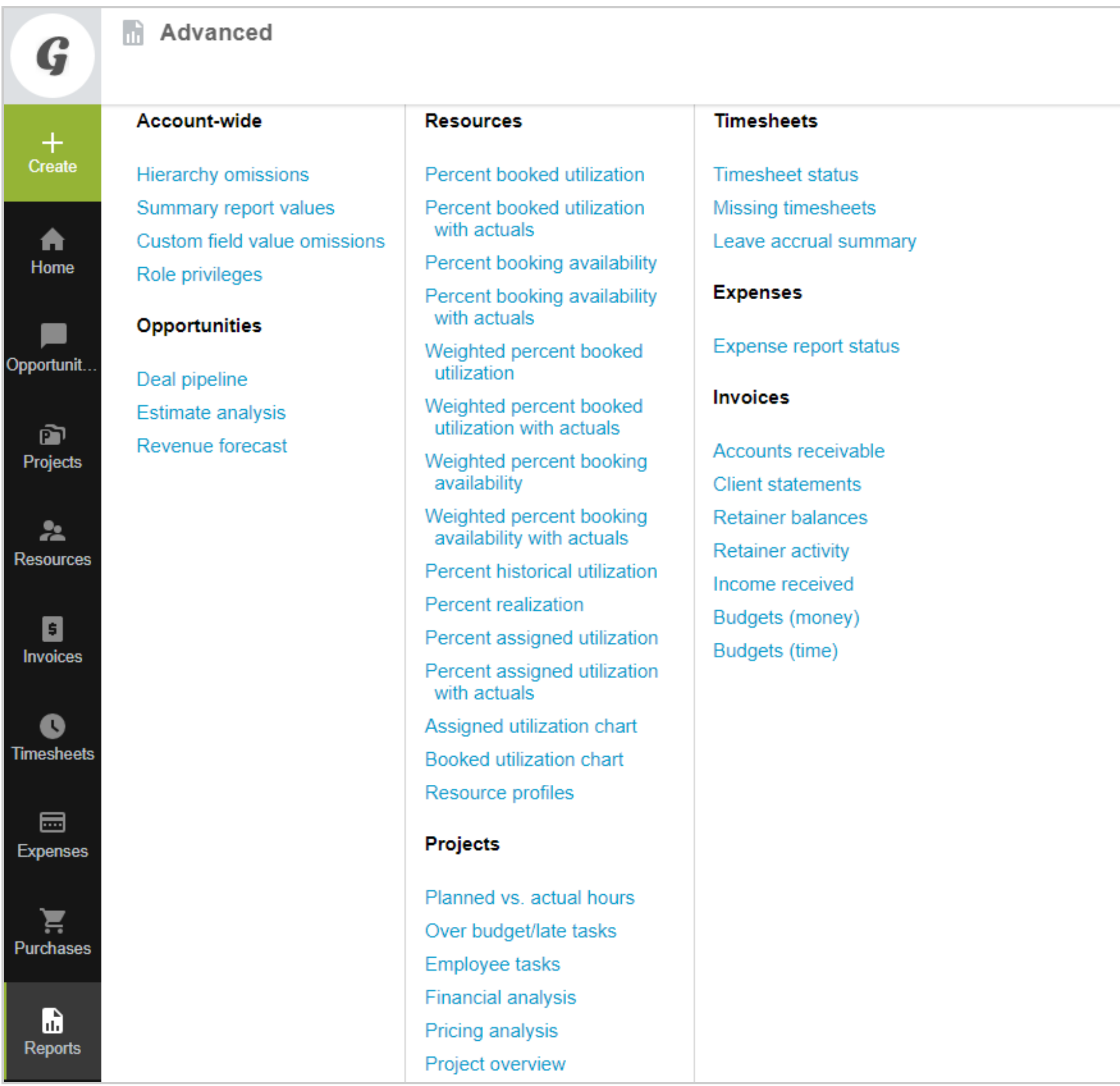
Note: To enable the Report Management and Editor feature, contact OpenAir Customer Support. After the feature is enabled, account administrators can give individual employees access to the report management and editor interface.

To give an employee access to the report management and editor interface:

1. Go to Administration > Global Settings > Users > Employees > [*Select an employee*] > Demographics
2. Check the **Enable the report management and editor interface** box under the Reporting Options form section.

You can use the Bulk employee change wizard to give multiple employees access to the report management and editor interface at the same time.

Reports



The OpenAir Reports application provides employees who have the appropriate privileges the ability to create and run a wide variety of reports based on your company's configuration. OpenAir provides a robust and flexible reporting environment. You are able to choose the fields you wish to see and the order in which they are displayed, along with the ability to filter the data.

There are four general types of reports: Summary, Detail, Advanced and Drill Down (optional). These four report types and their uses are described as follows.

Summary Reports

Summary reports give you access to report information across OpenAir such as reporting Timesheet entries along with Invoice information and Project revenue recognition. Reports are created by selecting a base report then completing the report form to configure the options for report generation. Selecting a base entity under the application specific context, rather than Account-wide, will limit the available values to only those in that application. Summary reports provide subtotal capability and flexible data filtering as well as inclusion of custom calculations in your OpenAir account. See Custom Calculations Overview.

> **Tip:** Columns can be locked in Summary Reports which do not contain a subtotal.
>
> If the option to lock columns isn't available, navigate to User Center > Personal Settings and make sure that the following settings are enabled: **Anchor column titles at top of page when scrolling vertically** and **Enable anchoring of left columns when scrolling horizontally**. Then, navigate to Administration > Global Settings > Display > Interface: Display and make sure that the setting **Enable dynamically collapsible sections in hierarchy lists** is disabled.
>
> If column locking is not available in Summary Reports because they contain a subtotal, you can add at least one detail field to the Report and run it. This will make anchoring available even in Summary Reports with subtotals.

Detail Reports

Detail reports give you access to report information within specific applications or tables such as Employee information. Some information may be rolled-up for a basic sub-total function, but in general, reports in the Detail tab are used to report specific fields for a single object. Calculations are not performed in detail reports and the intended use of these reports is to provide list values of data.

Advanced Reports

Advanced reports provide pre-configured OpenAir reports that have specific functionality and formatting built in. The options for report configuration are generally limited. Key reports in this area include: Pending billings and Pending recognition reports, Timesheet status, Accounts receivable, and a variety of resources utilization reports.

Drill Down Reports

Drill down reports are useful if you are using Hierarchies with multiple levels in your company's environment. You can create reports by selecting the specific Hierarchy and Level within the hierarchy.

You will also need to provide a Time period-Dates, the Application for which the hierarchy is associated, Data values and Other options. See Hierarchy.

> **Note:** The Drill Down tab is an optional feature that is enabled unless you select the **Hide the 'Drill down' reports tab** available in Reporting Options. See Reporting Options.

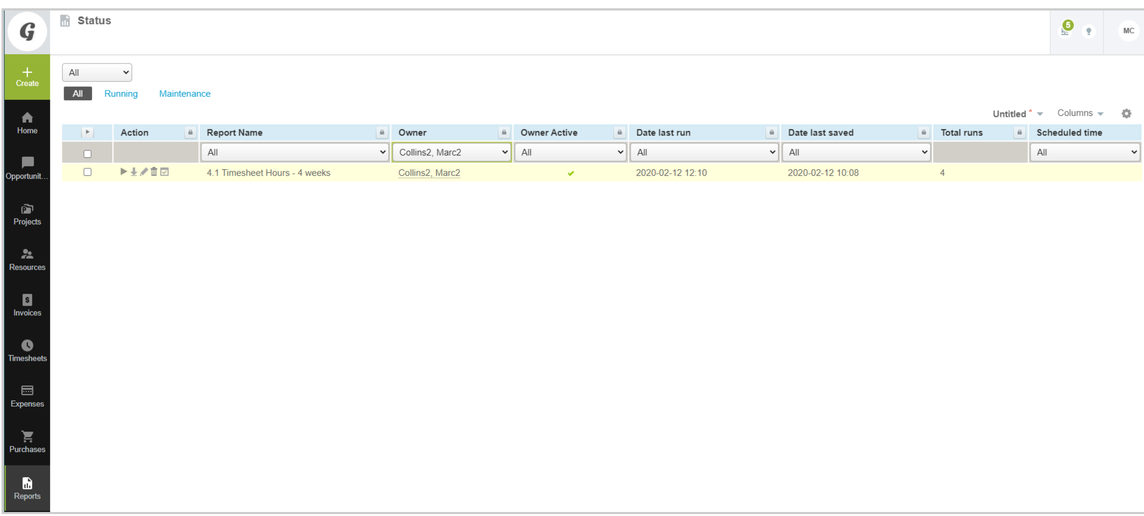
Reports Status

The Reports status screen provides you with an overview of report statuses and details. This is a report management tool that lets you monitor the status of reports and take action on long running reports impacting performance, stale reports, etc.

It consists of three views.

- All
- Running
- Maintenance

All

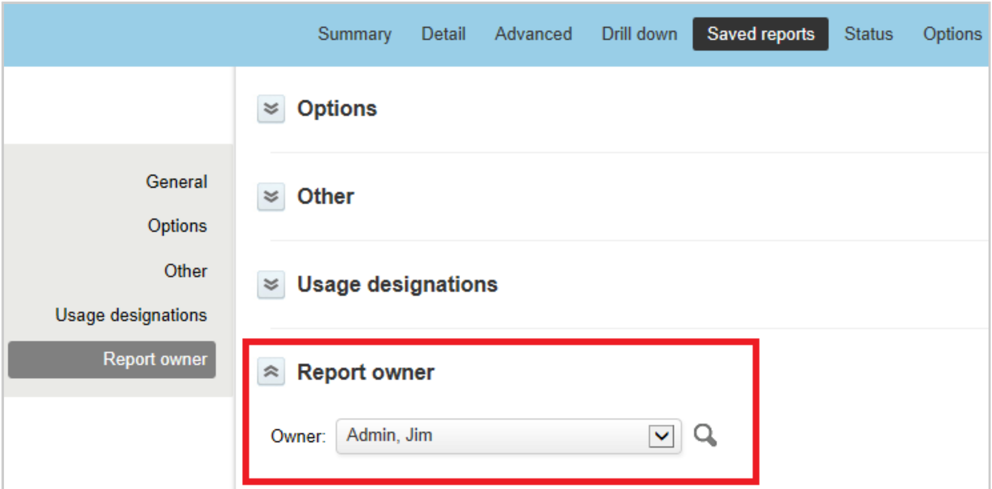


From the **All** view you can see details on how reports are being used in your account.

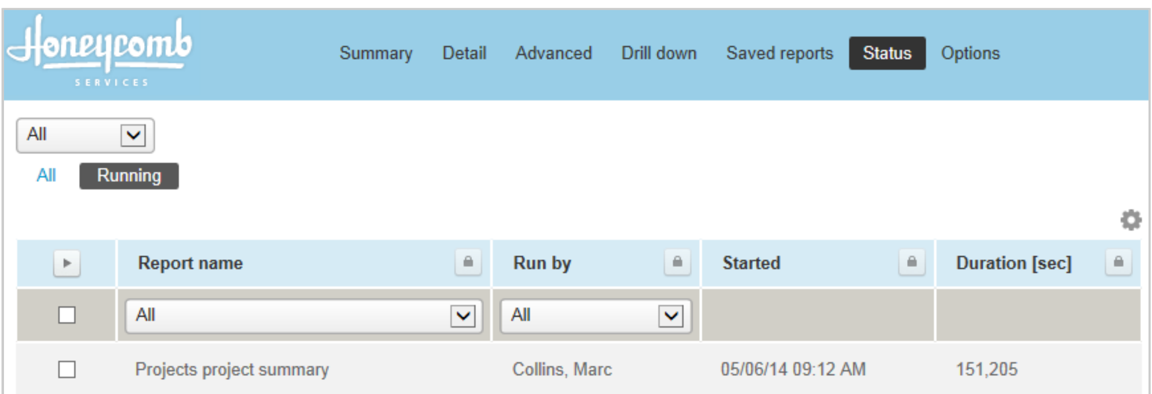
You can also select one or more reports and run a bulk action to:

- **Delete the selected report**
- **Remove the selected report from schedule**
- **Change the report owner**

You can also change the report owner from the **Report owner** section on each saved report.



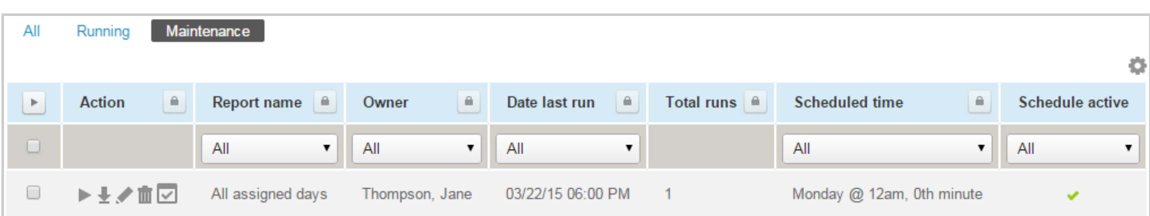
Running



From the **Running** view you can see all the details for the reports that are currently running.

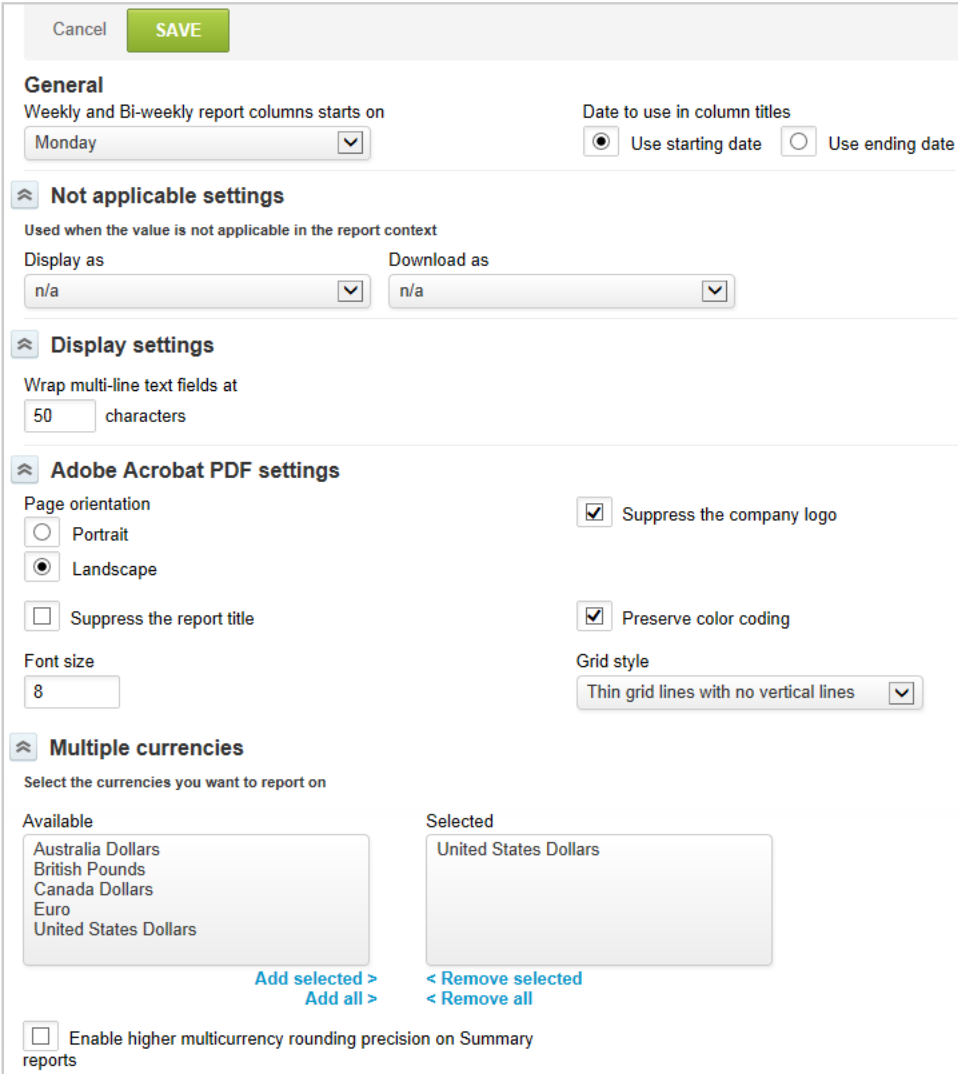
You can also select one or more reports and run a bulk action to **Stop the selected report**.

Maintenance



From the **Maintenance** view you can see all the active scheduled reports with inactive owners. This tab is available for administrators to clean their active scheduled reports.

Reporting Options



Reporting Options settings provide system-wide controls on the appearance of OpenAir reports and functions available in within the Reports application. In the following steps, we address the Options tab, which lets you configure the Global report options form. These Global report options affect the appearance of reports.

To view company report-related switches in Global Settings, see Reporting Options.

To set Global Report options:

1. Go to Reports > Options.
2. Select the Weekly and Bi-weekly report columns starts on. The default is Monday.
3. Select the Date to use in column titles: Use starting date or Employee ending date.
4. Designate how to handle settings when a value is not applicable in the report context.
5. Enter Display settings to wrap multi-line text fields at. The default is 50.
6. Select Adobe Acrobat PDF settings and identify other page display properties.

7. Enter Font size and select Grid style
8. Identify Multiple currencies you want to report on.
9. Click Save.

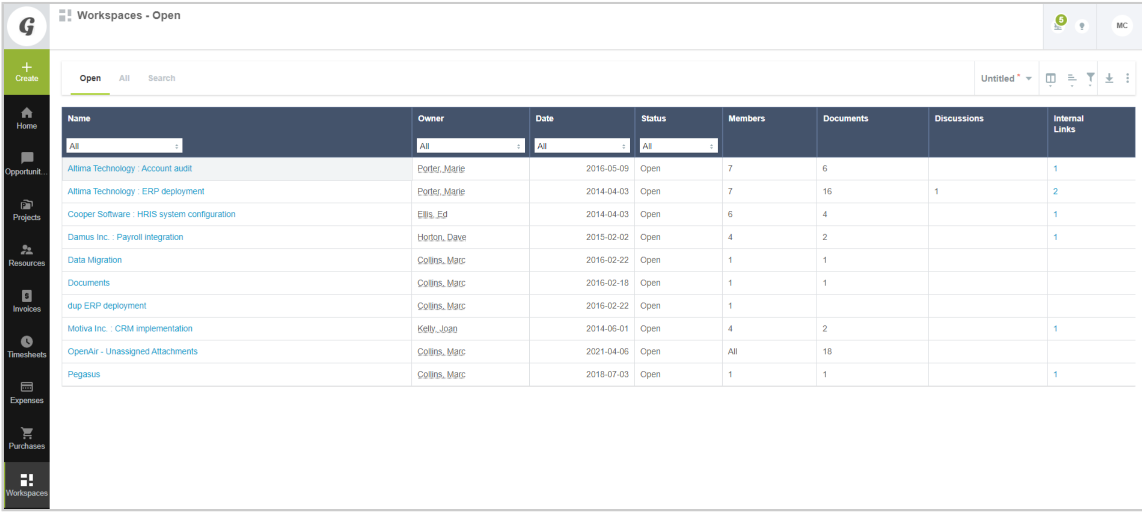
Frequently Asked Questions (FAQs)

What are the differences between the types of reports and how would I use them?

Refer to the following descriptions:

- **Summary reports** (also called **Crosstabbed reports** in the Report Management and Editor tools) provide a great deal of flexibility in reporting. You are able to subtotal on many fields and incorporate fields from different applications into the reports.
- **Detail reports** (also called **Tabular reports** in the Report Management and Editor tools) concentrate on specific entities within the applications and you can customize the reports to your needs. For example, you can create a report on project details or invoice details based on the information available within the entity you select.
- **Advanced reports** are standard reports provided by OpenAir. You have the option to modify some parameters within the report.
- **Drill Down reports** are used to provide specialized reporting on hierarchies you have set up in your OpenAir account such as employee country, state, and project regions. The Drill Down tab is an optional feature that is enabled unless you check the **Hide the 'Drill down' reports tab** option under the Reporting Options. See Reporting Options.
- The **Saved Reports** tab shows customized reports that you or others in your company have created in your OpenAir account. These are used in the charts and graphs you display in the Home application.

Workspaces



Overview

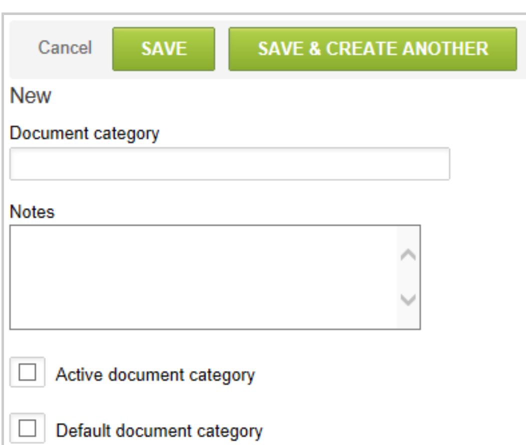
The Workspaces application provides employees with an area to store project-related documents and share them with other team members. The workspace owner control who can access the workspace area by granting workspace membership to individual employees, assignment groups, or all employees. The workspace owner can control members access rights as read-only, read/write, or administrator.

After you create a workspace, you can add a discussion thread. The discussion could be about anything related to the workspace such as a project, for example. You can also add documents, and edit the properties of the workspace. You can search workspace documents and discussions using keywords.

You can manage alerts for documents and discussions by selecting the events that trigger an alert and designate members who receive the alert. You can check the **"Exclude alerts" on by default** box to disable alerts by default for all documents and discussions in a workspace.

You can set up an Account storage alert that will notify you when a certain percentage of your account storage capacity is used.

Document Categories



Within the Workspaces application you are able to define specific Document Categories to use in OpenAir. You can apply these categories to your documents when loading them into the workspace or folders within a workspace. Identifying documents by category enables you to easily track and maintain the documents you load into NetSuite OpenAir.

To create Document categories:

1. Go to Administration > Application Settings > Workspaces > Document categories.
2. Select **New Document category** from the **Create Button**.
3. Enter the Document category name and Notes, if desired.
4. Select the check box for **Active document category**.
5. You may optionally select one of the document categories to be the default category by selecting the check box for **Default document category**.
6. Click Save.

Searching Workspaces, Documents or Discussions

You can search workspaces, documents or discussions for specific keywords.

By default, the search functionality include document names only. You can extend the document search to the documents content as well as document names. To do so, go to Administration > Application Settings > Workspaces > Other Settings and check the **Enable document content searching** box. See Other Settings.

The Search feature is available in the following locations:

- Workspaces > Workspaces > Search
- Workspaces > Documents > Search
- Workspaces > Discussions > Search
- Workspaces > Workspaces > [*Select a workspace*] > Search
- Workspaces > Workspaces > [*Select a workspace*] > Documents > Search
- Workspaces > Workspaces > [*Select a workspace*] > Discussions > Search

To search workspaces, documents or discussions:

1. Go to one of the locations above.
2. Enter one or more **Keywords**.
3. Choose which workspaces you want to include in your search. You can include:
   - **All** workspaces
   - **Open** workspaces only
   - **Selected** workspaces only

     If you choose to include selected workspaces only, click **Create** and select the workspaces to include in your search.

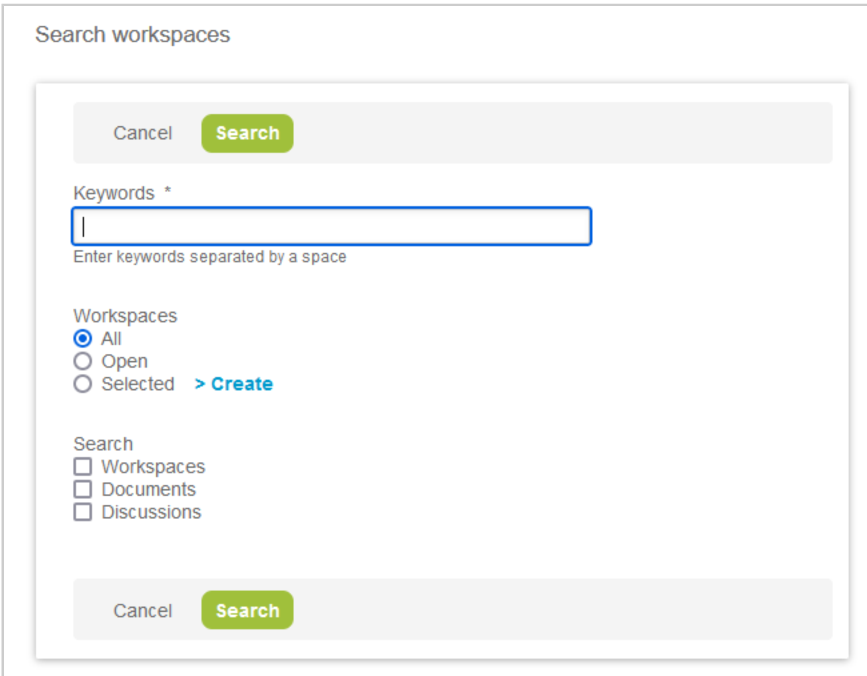
   > **Note:** You cannot select the workspaces you want to include in the search if you are viewing a workspace, or a document or discussion sublist within a workspace.
   >
   > The **Selected** option is available only in Workspaces > Workspaces > Search.
4. Select all the record types you want to include in your search:

- **Workspaces** — Available only Workspaces > Workspaces > Search
- **Documents** — Available only Workspaces > Workspaces > Search and Workspaces > Workspaces > [*Select a workspace*] > Search
- **Discussions**

  — Available only Workspaces > Workspaces > Search and Workspaces > Workspaces > [*Select a workspace*] > Search

5. Click **Search**.

   A list view appears showing the search results.



Downloading Documents from a Workspace

This feature is available in the following locations:

- Workspaces > Documents > All
- Workspaces > Documents > Search
- Workspaces > Workspaces > Search
- Workspaces > [Select a workspace] > Search
- Workspaces > [Select a workspace] > Documents

You can download documents one by one, download multiple documents at the same time, or download all documents in a specific workspace or across all workspaces.

- Downloading a Document
- Downloading Multiple Documents at the Same Time
- Downloading All Documents from a Workspace

- Downloading All Documents from All Workspaces

> **Note:** You can also use the Automatic Backup Service to download all documents from all workspaces along with your OpenAir data at a regular scheduled time. See Automatic Backup Service.

Downloading a Document

You can download documents one by one from the documents list view.

To download a document:

1. Do one of the following:
   - Go to Workspaces > Documents.
   - Go to Workspaces > [*Select a workspace*] > Documents.
   - Search for a document. See Searching Workspaces, Documents or Discussions.
2. Locate the document you want to download.
3. Click the download icon in the actions column (redesigned list view) or click Download from the Commands column (otherwise).

   Depending on your browser settings, the file download starts automatically or a window appear prompting you to choose a download location.

   > **Tip:** Use the Column selection panel in the list view toolbar to add the Commands column to your list view.

Downloading Multiple Documents at the Same Time

You can download multiple documents as a ZIP archive from the documents list view or the documents search results.

To download multiple documents at the same time:

1. Do one of the following:
   - Go to Workspaces > Documents.
   - Go to Workspaces > [*Select a workspace*] > Documents.
   - Go to Workspaces > Search, and search documents for one or more keywords.
   - Go to Workspaces > [*Select a workspace*] > Search, and search documents for one or more keywords.
2. Check the box in the bulk action column for all the documents you want to download. Check the box or click **Select All** in column header to select all documents on the list view page.
3. Click **Bulk actions** then **Download selected**.

   Depending on your browser settings, a file download starts automatically or a window appear prompting you to choose a download location. The ZIP archive default filename is "OpenAirDocuments.zip".

Downloading All Documents from a Workspace

You can download all documents from a workspace as a ZIP archive.

To download all documents from a workspace:

1. Go to Workspaces > [*Select a workspace*].
2. Click **Download all documents**.

   The Download all documents form appears
3. (Optional) Check the **Include folders** box if you want the content of the ZIP archive to preserve the folder structure of your workspace documents.
4. (Optional) Check the **Include document revisions** box if you want to download all previous revisions of each document. Revisions for each document will be placed in a subfolder.
5. (Optional) Check the **Delete all documents** box to delete the documents from OpenAir after downloading them.

   > **Note:** This option is available only if the Documents Bulk Deletion on Download optional feature is enabled for your account. See OpenAir Optional Features Book.
6. Click **Download**.

   A page appears including a link to a ZIP archive containing all documents with the options selected. If you checked the **Delete all documents** box, the page confirms that all documents in the workspace were deleted.
7. Click the link to the ZIP archive to initiate the file download.

Downloading All Documents from All Workspaces

You can download all documents from all workspaces at the same time if the Download All Documents Across All Workspaces optional feature is enabled for your account. See OpenAir Optional Features Book.

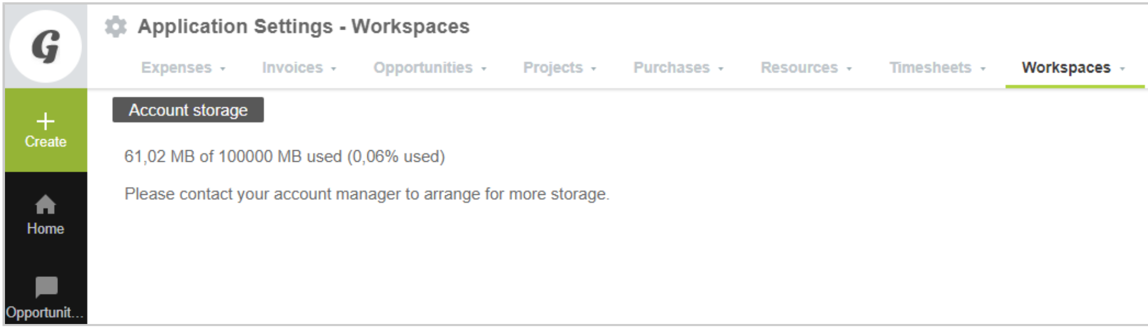
To download all documents from all workspaces:

1. Go to Administration > Application Settings > Workspaces > Download all documents.
2. Click **Download**.

   Depending on your browser settings, a file download starts automatically or a window appear prompting you to choose a download location. The ZIP archive default filename is "Workspace_Documents_YYYY-MM-DD.zip". The Zip archive contains all documents and all revisions for each document, and preserves the folder and document structure.

   > **Important:** If you have a large volume of workspace documents stored on your OpenAir Account, generating a large ZIP archive for download may take a long time and your browser may time out.

Account Storage



When using the Workspaces application to store your company's documents, you can monitor the amount of storage space currently used and the total amount of storage space available on your account. The default storage space available is 5MB. To increase the storage capacity for your account, contact your OpenAir account manager.

To view the account storage capacity and space used, go to Administration > Application Settings > Workspaces > Account storage.

You can set up an Account storage alert that will notify you when a certain percentage of your account storage capacity is used. See Creating an Account Storage Alert.

You can use the following features to take a copy of the documents stored in OpenAir and delete documents at any time to manage your account storage.

- You can use OpenAir Automatic Backup Service to schedule the regular delivery of your OpenAir account data including documents and attachments. See Automatic Backup Service.
- You can download and delete workspace documents. See Downloading Documents from a Workspace.
- You can delete reimbursed or approved expense attachments for a specified date range. See Expense Attachment Deletion Wizard.

Creating an Account Storage Alert

You can configure OpenAir to check the amount of storage space currently used on your account at regular interval and notify you when the storage space used reaches a percentage of the capacity allowance for your account.

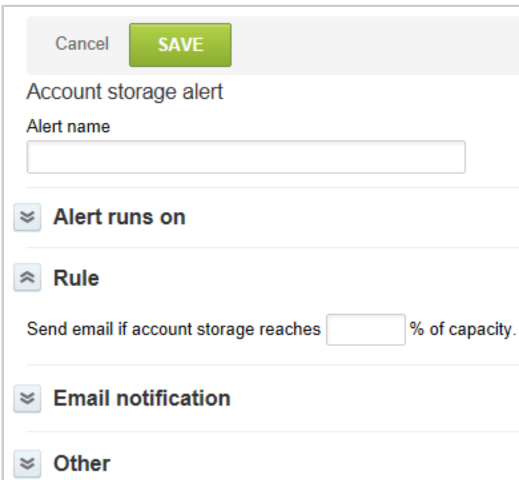
To create an account storage alert:

1. Go to Administration > Application Settings > Workspaces > Alerts.
2. Click the Create button then **New account storage alert**.
3. Enter an **Alert name**.
4. **Alert runs on** — Select the Day and Time you want to schedule the alert to run.
5. **Rule** — Enter the percentage of storage capacity above which notification email should be sent.
6. Enter the following **Email notification** information:
   - **The email is from** — Sender email address.

> **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`. See also Email Settings.

- **The email will be sent to** — Recipient email address.
- **Subject** line.
- **Additional text to include** in the body of the email.

7. Check the **Active alert** box.
8. Click **Save**.



Other Settings

There are several other settings you can select related to Workspaces.

To access the Workspaces Other settings:

1. Go to Administration > Application Settings > Workspaces > Other Settings.

Require a document category when checking in documents: Document categories are configured to group documents by type for easy reference. If this option is checked, ensure you have set up all necessary document categories so a valid value is always available. If this option is unchecked, employees may optionally choose a document category provided values exist. If values do not exist, the field does not display when creating or loading a document.

Require a comment when checking in document revisions: The comment field is optional unless this option has been selected. Requiring a comment on document revisions helps enforce policies such as including a summary of changes on the document history.

Require a message body when creating a new message or replying: The Workspaces application enables discussions to be entered and tracked. Checking this option prevents empty messages from being created, which may also trigger notifications to employees involved in the discussion depending on the alert settings within the workspace.

Add the customer name in auto-created project workspaces: When creating a project, the project creator is given the option to create an associated workspace. By default, the name of the workspace includes the project name and the base workspace name, if one was copied. Selecting this switch also includes the client name in the name of the workspace. This is helpful if you have projects with similar or the same name to ensure you have unique workspace names.

Enable document content searching: Check this box to extend workspace document search to the content of documents in addition to the document names. See also Searching Workspaces, Documents or Discussions.

After you enable this feature, go to Administration > Global Settings > Account > Maintenance Settings, choose **Build document content search indexes** and click **OK**. This indexes all workspace documents to support the search functionality.

> **Important:** Enabling document content search reduces the amount of storage space available on your account as storage space is required for content indexing.

Home

Overview

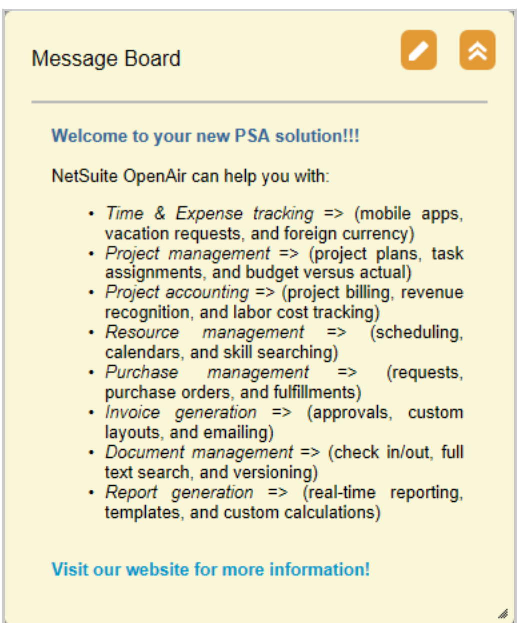
The Home application is your OpenAir home page. As an account administrator, you can use the Home application to convey critical information to employees such as messages and reminders of actions to complete in the system such as approvals.

The Home application includes tabs for Home, Dashboard, and Calendars. The Home tab provides a place to distribute an account-wide message to all employees. It also displays reminders for items waiting your approval and links to those items. Other portlets include My Status and Company status, Charts, Reports, and Wizards.

Home

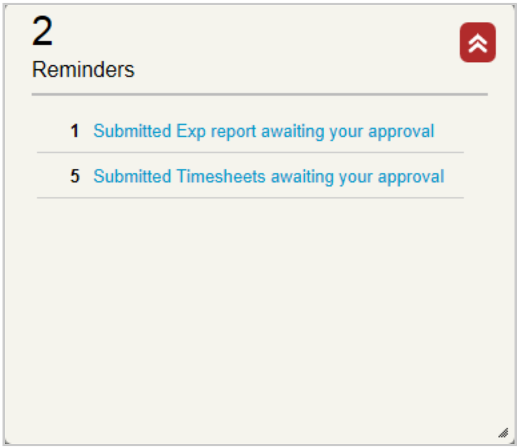
Home is the information tab under the Home application.

Message Board



You can post a central message or a department-specific message to the Message Board area. This is a good place to publish your processes, instructions, and general information with regard to using OpenAir within your company.

Reminders



Reminders provide information about items in OpenAir that require your action. Typically this is a data-related item awaiting your review and approval such as a timesheet or expense report. Any item within OpenAir that requires a submit action may have a routing or approval process associated with it. A notification then displays in the Reminders portlet for those required to complete a review action.

Wizards

Account administrators and users with the relevant role permissions can use wizards to copy information or complete an action such as attachment deletion across multiple items at one time. The wizards are useful when you want to update a large number of employee records with the same information, or remove expense attachments in bulk across a large number of expense reports based on your parameters, for example.

There are four wizards available:

- **Bulk employee change wizard** – The bulk employee change wizard enables you to copy field values and settings from one active employee record to multiple active or inactive employee records. See Making Changes to Multiple Employee Records at the Same Time.
- **Expense report attachment deletion wizard** – The expense report attachment deletion wizard enables you to free up OpenAir storage space by deleting attachments associated for older expense reports that have been reimbursed or approved.

  To do so, go to Dashboard and click **Expense report attachment deletion wizard**, enter a date range, choose between the reimbursed and approved expense report statuses. After you click **Delete the attachments**, all the attachments for expense reports with a date within the specified range and the chosen status are deleted. This action can not be undone.
- **Bulk task change wizard** – The bulk task change wizard enables you to copy field values and settings from one task across multiple tasks within a single project. This is helpful for maintaining larger projects.

  To do so, go to Dashboard and click **Bulk task change wizard**. Step 1 of the wizard displays. Identify the customer and project. Select the task to copy from. Select the information to copy to another task. Click Next. Step 2 of the wizard displays. Select the task to copy to. Click Run.
- **American Express receipt import wizard** – The American Express receipt import wizard enables you to connect to an American Express online statement and download your receipts into a preexisting expense report.

Status

The Status areas of Home provides information about data-related items within your OpenAir account. It includes My Status and Company status. Each is explained as follows.

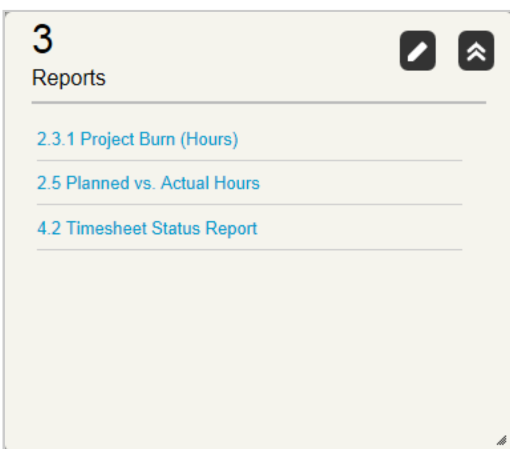
My Status — Employees may find the My Status area helpful as a summary of key elements in OpenAir, such as their open timesheets or expense reports. Open tasks and issues are also noted that may be helpful, depending on your configuration and use of OpenAir. In many cases, general overhead or administrative projects capture non-billable time so these tasks are always open and contribute to the open tasks count on My Status.

Company Status — The Company Status area provides similar information to My Status, but with a company-wide view in the OpenAir environment. As an account administrators, you may find this information helpful as well as other managers. You can limit access to the Company Status area through form permissions.

> **Note:** Depending on your configuration and use of OpenAir, you may not need the My Status and Company Status portlets to show the number of open or incomplete tasks. To remove the number of incomplete tasks, contact OpenAir Customer Support and ask for the following switch to be disabled: “Display incomplete tasks on dashboard”.

Reports

You can mount reports here instead of having employees access them from the Reports application. A one-click execution is all that is required to run the report and display the results. This enables employees to run critical operational reports in a dashboard fashion.



Making Changes to Multiple Employee Records at the Same Time

The bulk employee change wizard enables account administrators and user with the Bulk employee change wizard role permission to copy information from one active employee record to multiple active or inactive employee records.

Examples of use cases and information you can change using the bulk employee change wizard include:

- Module access privileges – To give several employees access to the Account, Timesheets and Expenses modules only so that they take up one Timesheets and Expenses (T&E) only user license instead of a Full user license. See Licenses.
- Exchange access privileges – To give or remove several employees access to the OpenAir Mobile app or other add-on services.
- Role, assigned filter sets, filter set module overrides – To change access control settings as you introduce new roles and filter sets. See the help topic The Security Model.
- Individual user settings and options on the employee demographic form – You can change some of the standard user settings and options and all custom fields available on the demographic form. This can be useful if you want to introduce a feature that requires additional set up at the user level, such as SAML SSO or two-factor authentication, for example.
- Schedule, Cost, Proxy or Leave Accrual settings – To change all settings on the tab for several employees.

You can copy the information to named employees or to all employees in a department.

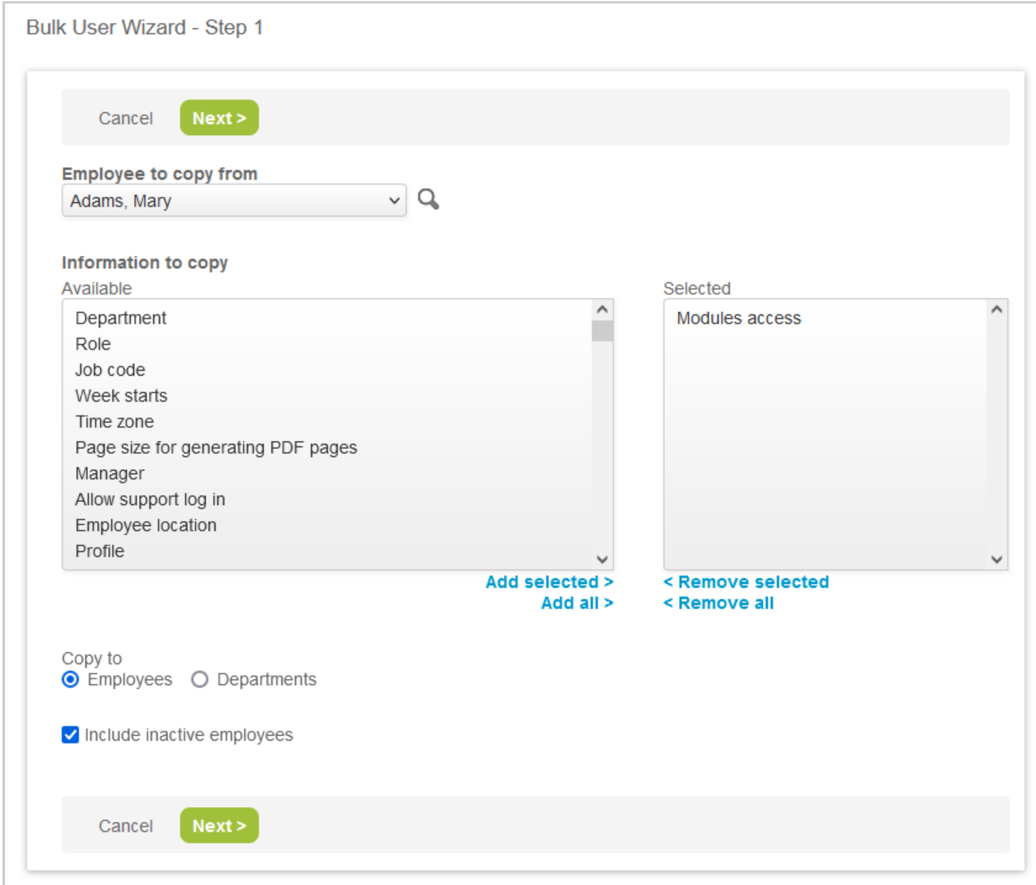
Note: Review the following guidelines:

- Not all the information can be changed using the bulk employee change wizard. You cannot copy the password or primary filter set, for example. If the information you want to change is not available in the bulk employee change wizard, update employee records one by one or consider using OpenAir Integration Manager to update employee records in bulk. For more information about OpenAir Integration Manager, see the help topic OpenAir Integration Manager Overview.
- The employee you copy the information from must be an active employee. However, you can copy the information to both active and inactive employees.

To make changes to multiple employee records at the same time:

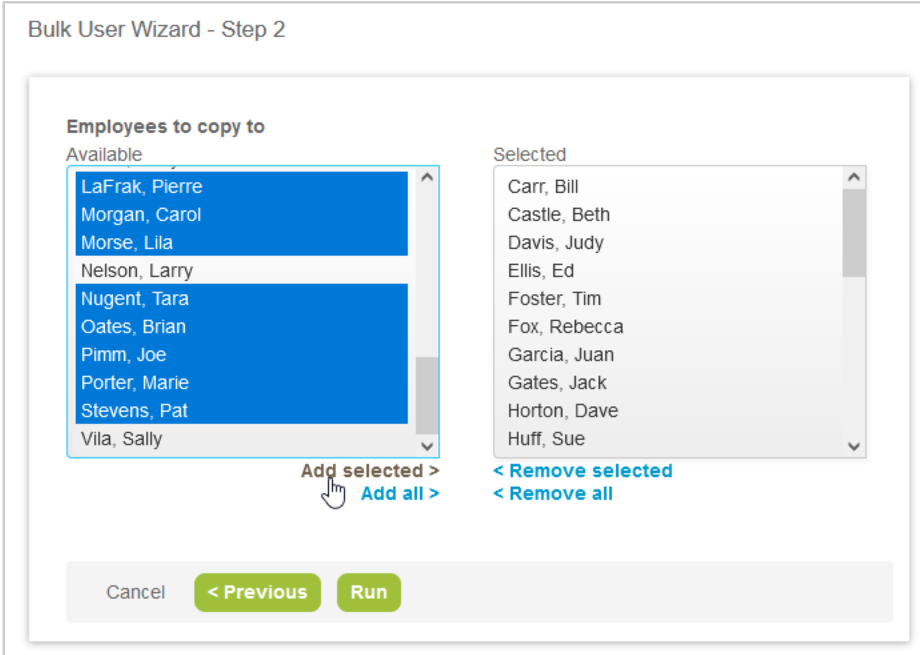
1. Make the changes to one employee record. To do so, go to Administration > Users > Employees > [*Select an employee*], make the changes, and click **Save**. For more information about employee records, see Employees Overview.
2. Go to Home > Home.
3. Click **Bulk employee change wizard** in the Wizards portlet.

   The Bulk User Wizard – Step 1 form appears.



4. Select the **Employee to copy from**. Only active employees are available in the dropdown list.
5. Under **Information to copy**, select the information you want to copy from the list in the **Available** box.
6. Click **Add selected**.
7. Under **Copy to**, choose **Employees** to copy the information to selected employees or **Departments** to all employees in selected departments.
8. Check the **Include inactive employees** box if you want to copy the information to inactive employees.
9. click **Next**.

   The Bulk User Wizard – Step 2 form appears.



10. Select the **Employees to copy to** or **Departments to copy to**, select the employees or departments you want to copy the information to from the list in the **Available** box.
11. Click **Add selected**.
12. Click **Run**.

   > **Important:** Verify the information, and users or departments you selected before you click run. The changes cannot be undone automatically.

   A confirmation message appears when the operation completes.
13. Click **OK**.

   A page summarizing the changes made appears.

Home and Dashboards

Charts are created in the home and dashboard tabs under the Home application. Charts provide a graphical representation of data in saved reports to which an employee has access.

When you have enabled selections on the Employee Demographic form for enhanced user interface and the Administration application view, employees can create and customize graphs available within the Dashboard that display Saved reports. These are available by accessing the Home application and selecting the Dashboard tab. You must also contact OpenAir Customer Support and request the Dynamic Chart Feature if it is already not enabled in your OpenAir account. When enabled, the links and information available for graphs are under the Dashboard tab.

> **Important:** Each report portlet can show a maximum of 2,000 rows of data by default. To increase this limit for your account contact OpenAir Customer Support. Increasing the maximum number of rows may impact performance. You should use filters to reduce the report size so all data show on the portlet.

To create a chart:

1. Create a Summary, Detail or Utilization report. Go to the Reports application and select a Summary, Detail or Advanced (Resources-Utilization only) report. See Reports.
2. Modify the report parameters as necessary for you company's needs.
3. Check the Save this report as... box and enter a report name in the field. Save the report.
4. Go to Home > Dashboard and select **New chart** from the **Create Button** .
5. In the New Chart form, enter the Chart type
6. Enter the Chart Title. This displays on the top of the chart or graph.
7. Select the specific Saved Report from the drop-down list.
8. Choose the Report Value. If the Report contains multiple values, you can select multiple Report Values within the chart form when you use one of the following chart types: Line, Horizontal multi-bar or Vertical multi-bar.
9. To view multiple chart values, select Add to display multiple report values. Choose the sort order (Desc - descending or Asc - ascending) and select the appropriate Display values from the drop-down list.

   > **Note:** The default behavior is to chart the maximum number of values. For multivalue charts, a check box displays to Use grand totals.

10. You can resize charts within the Dashboard. To resize a chart, click on the lower right corner of a chart and drag to expand.

You can also create charts and graphs under different tabs in the application. For example, you may have one tab for Financial information and another for Utilization information.

To create a new dashboard tab:

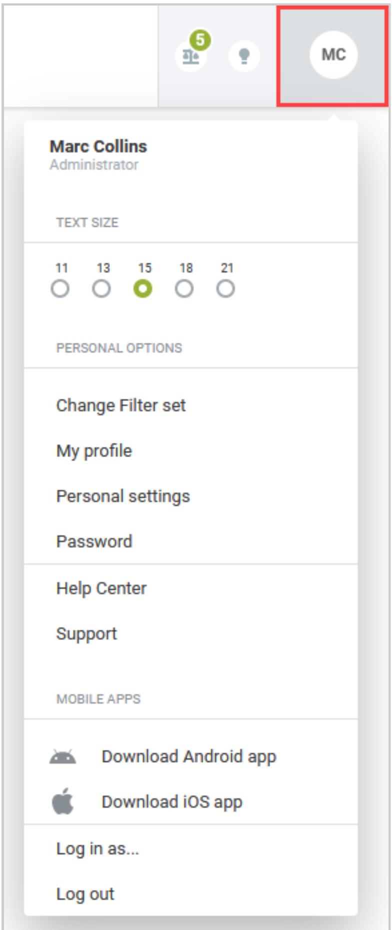
1. Go to Home > Dashboard and select **New tab** from the **Create Button** . The following selections are available:
   - New chart
   - New report
   - New tab

You also have the ability to copy charts and graphs from one Employee to another or to a Department. To do this, use the Bulk employee change wizard. See Wizards.

Calendar

Calendars is a display feature that gives you a schedule view of information as captured within OpenAir. Here, they also have the ability to see other employees' calendars provided you, as the account administrator, have granted them the appropriate form permissions and filter sets.

User Center



Several OpenAir employee functions display under the User Center menu, the setting of personal account options, managing an employee password and, the Log in as... that provides proxy capability.

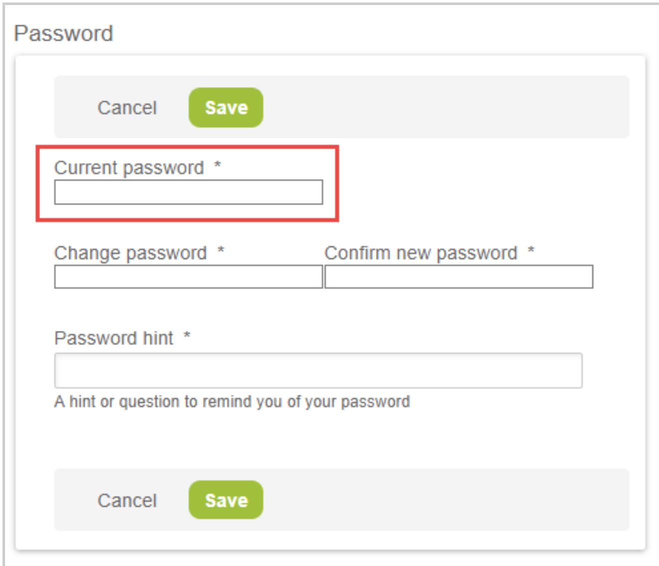
Personal Settings

Employees can configure several personal settings and optional features under this tab. This is where they select the check box to allow support log in as well as identify several account and application options. Each employee may set print settings and choose the application that displays upon log in.

Password

This is where employees manage and make changes to their password.

If your account has the **Verify Password Before Change** feature, a user changing their password must also enter the old password. This feature enables a new required field called Current Password, which is used when a user changes their password. The correct password must be entered before the password will be changed. Contact OpenAir Customer Support to enable this feature.



This feature also affects changing a password when it has expired, or if a user created an invalid password (for example, with the incorrect number of alphanumeric characters) and must create a new password which conforms to the rules.

Warning: If your account has a maximum number of login attempts setup, typing the current password incorrectly when changing passwords will count toward the allowed password attempts.

Log in as...

When you, as an account administrator, grant proxy permission to an employee, you identify the other employees that individual can log in as. When an employee selects **Log in as** from the **User Center** menu, a list of employees displays. To log in or proxy in as another employee, the employee clicks on an employee name and a new instance of OpenAir displays so that the employee can perform a function for the proxied employee. See User Proxy Overview.

Change Filter set

When you assign employees several filter sets, they will have the additional **Change Filter set** User Center menu item to select the active filter set. See Filters Hierarchy Overview.

Opportunities

Overview

The Opportunities application lets you capture prospect information about a potential customer and an existing customer. You can add contact information, deal information, an estimate, a proposal, proposal templates, and business types, customer sizes, customer sources, and territories.

Refer to the following help topics:

- Approval Processes

  See Approval Routing under Global Features.

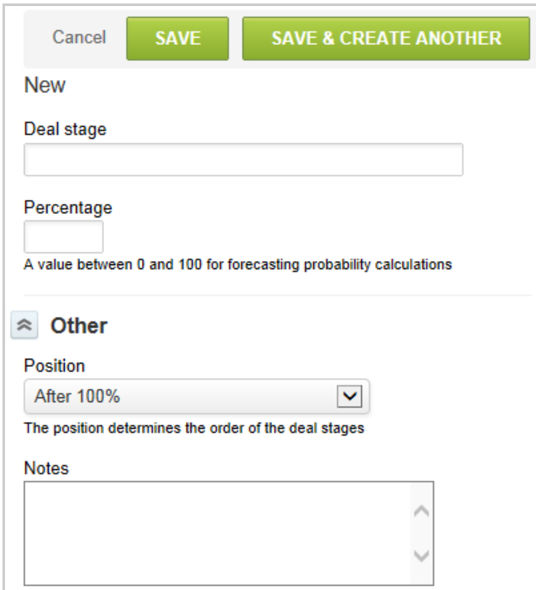
  > **Note:** You can access the full list of approval processes defined for your account from any of the Expenses, Invoices, Opportunities, Purchases, Resources, and Timesheets application settings. The same approval process may be used for different transaction types across different OpenAir modules.

- Deal Stages
- Proposal Layout
- Templates
- Territories
- Business Types
- Customer Sizes
- Customer Sources
- Notifications

  See Notifications under Global Features.

- Other Settings

Deal Stages



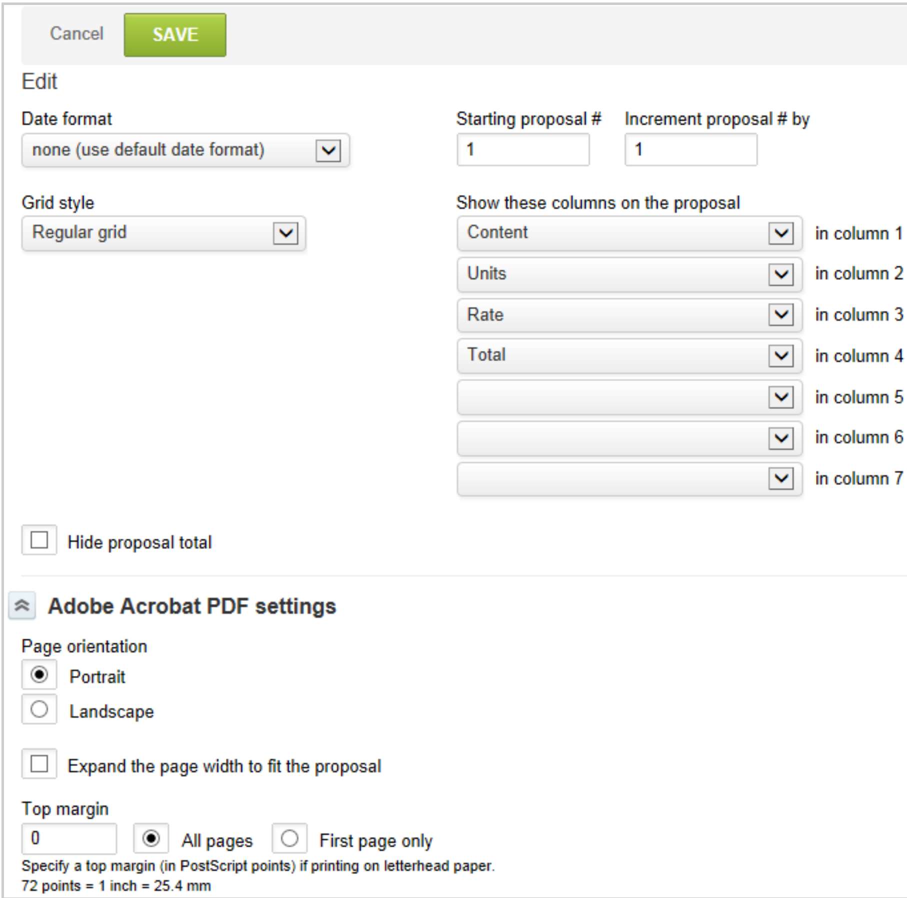
Deals are the primary object in tracking pipeline opportunities within OpenAir when using the Opportunities application. Deals, when created, may be matured to include estimates and can result in a proposal in the Opportunities application or project in the Projects application.

When creating a deal, a standard field on the deal form is the Deal Stage. Deal stages can be defined per your established sales process to track maturity of an opportunity in the pipeline.

To define a Deal stage:

1. Go to Administration > Application Settings > Opportunities > Deal stages.
2. Select **New Deal stage** from the **Create Button**.
3. Enter the Deal stage name and a representative Percentage to be used by OpenAir for weighted pipeline reporting. As deal stages are entered, you also can indicate the order in which the deal stages are presented to the employee in the drop-down field option on the deal form.
4. Add Notes about the deal stage, if desired.
5. Click Save.

Proposal Layout



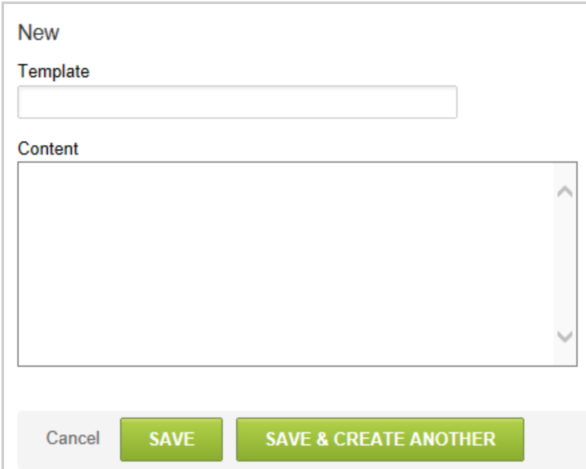
Proposals generated in OpenAir are built by adding various proposal components such as text items, hourly items, and fixed fee items. Together these components make the proposal a report that can be mailed directly to customers for review and acceptance.

The proposal report that the customer sees via the proposal link in the email is controlled by the Proposal Layout option. Here you may identify which columns are displayed to the customer and in what order. You can identify the layout of the paper, the type of lines to display such as a grid or none, the format of dates, and the top margin to accommodate your company logo, unless you've chosen to override margin control in the logo settings. See Logos: UI, documents. The proposal layout form also doubles as a configuration for the starting number for proposals. The default starting number is 1 and proposals are incremented by default by l.

To define a Proposal layout:

1. Go to Administration > Application Settings > Opportunities > Proposal layout.

Templates



You can generate proposals in OpenAir using standard text and estimates including hours and rate, fixed fee values, and expense costs. Text items added to a proposal may reference defined Templates to ensure standard wording is used on all proposals. A typical example of this would be disclaimer text or copyright text.

When a template exists and a proposal is being created, you can create text items for the proposal and either enter custom text or select a defined template that uses the text defined in the template. If a template does not exist, the option to select a template does not display when you are creating text items for the proposal.

To create a Template:

1. Go to Administration > Application Settings > Opportunities > Templates.
2. Select **New Template** from the **Create Button**.
3. Enter the Template name and the standard wording for the template in the Content text area.
4. Click Save.

Territories

You can assign Territories to customers, prospects, and deals. These are an arbitrary geographical designation that you name. When you create them, you can include territory information when you create customer records. This field is visible on the list view of the customer data and in reports. Definition of territories is related to Opportunities when there is an organizational structure defining regions of customer aligning with the sales organization. Examples are: East, West, US, and EMEA. If territories are not defined, then the field does not display on the Customer form. See Customers.

Territories may be created or inactivated at any time. Inactive territories do not appear as a valid selection on Customer forms. Due to the general nature of the Territory form, you may chose to use this field for another purpose and rename Territory. See Interface: Terminology.

Business Types

You can create Business Types to capture OpenAir standard demographic information that includes Business types. This field is visible on the list view of the customer data and in reports. Definition of business types is related to how your company groups types of Customers. Examples are by vertical such as Healthcare and Education, or by industry such as Energy and Transportation. If business types are not defined, then the field does not display on the Customer form. Business types may be created or inactivated at any time. Inactive business types do not appear as a valid selection on Customer forms. See Customers.

Customer Sizes

You can create Customer Sizes records to capture OpenAir standard demographic information that includes Customer Sizes. This field is visible on the list view of the customer data and in reports. Definition of customer sizes is generally interpreted in terms of employees or revenue. Examples are less than 100, 101-500, 501-1000 if employee based, or less than $500K, $1M-$5M if revenue based. If customer sizes are not defined, then the field does not display on the Customer form. Customer sizes may be created or inactivated at any time. Inactive customer sizes do not appear as a valid selection on Customer forms. See Customers.

Customer Sources

You can create Customer Sources to capture OpenAir standard demographic information that includes Customer Sources. This field is visible on the list view of the customer data and in reports. Definition of customer sources is generally interpreted as how the customer was obtained. Examples are referral, marketing campaign, trade show, cold call, etc. If customer sources are not defined, then the field does not display on the Customer form. Customer sources may be created or inactivated at any time. Inactive customer sources do not appear as a valid selection on Customer forms. See Customers.

To define Territories, Business Types, Customer Sources or Customer Sizes:

1. Go to Administration > Application Settings > Opportunities and select either Territories, Business types, Customer sizes, or Customer sources.
2. Select the New entity you wish to create from the **Create Button**.
3. Enter the name of the particular entity value.
4. Add Notes for the value, if desired.
5. Click Save.

Other Settings

There are several other settings available in the Opportunities application.

To access the Opportunities Other settings:

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

Allow an approver to edit a submitted proposal: This feature, when selected, permits an approver to make adjustments to a Proposal after it has been submitted.

Allow a proposal to be associated with a deal: Enabling this feature lets you associate a proposal with a Deal. You first must have a Customer or Prospect set up. Then a Deal has to be created in the Opportunities application. You can then create a Proposal and tie it to the specific deal.

Disable editing of sent proposals: If the Proposal has been marked as Sent to the Customer or Prospect, this feature prevents editing the proposal within OpenAir.