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Introduction to 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. The connector allows you to access OpenAir data as an OData V4 data feed without the need to write any code.

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

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

The OpenAir Business Intelligence (BI) Connector supports any OData V4/JSON application. See:
- Importing Your Data Into Business Intelligence Tools
- To learn more about OData, visit the OData resource site at [www.odata.org](http://www.odata.org).

From the Business Intelligence Connector you can:
- Publish a saved or shared report and access the data from [https://www.openair.com/odata/v4/reports/](https://www.openair.com/odata/v4/reports/), see:
  - Publishing Your OpenAir Saved Reports to OData
  - Publishing Your OpenAir Shared Reports To OData
- Publish a List View configuration and access the data through it from [https://www.openair.com/odata/v4/listviews/](https://www.openair.com/odata/v4/listviews/), see:
  - Publishing OpenAir List Views To OData

You access the BI Connector with your OpenAir credentials and you can only see the data that you have been granted access to by your OpenAir administrator. Administrators control a user's ability to publish reports and list views with the following role permissions:
- Publish reports
- Enable publishing of shared reports to OData service with recipient's permission
- Enable publishing of shared reports to OData service with owner's permissions
- Publish ListView via OData.

Features and Limitations

Use of the OpenAir Business Intelligence Connector is subject to the following:
- The OpenAir Business Intelligence Connector only supports OData V4/JSON (Open Data Protocol).
- The OpenAir Business Intelligence Connector only provides read-only access to published reports and data accessed through published List View configurations.
- Report data is stored in a separate database for performance and scaling. Any report in your MyReports folder can be published. Shared reports must first be saved to your My Reports folder, and then you can publish them.
Data accessed through a List View is accessed in real-time from the main OpenAir account database. Users can only access the data they have been granted permission to view by their OpenAir Administrator.

- Only the **$top** and **$skip** system query options are available. See [OData Query Options](#) for more details.

- The OpenAir Business Intelligence Connector is subject to request limits — see [OpenAir Business Intelligence Connector Request Limits](#).

## OpenAir Business Intelligence Connector Request Limits

The OData Business Intelligence Connector is subject to request limits similar to the XML API limits. These limits are independent of any other data limits.

<table>
<thead>
<tr>
<th>Limit Type</th>
<th>Default Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Per Minute Request Limit</td>
<td>500 requests per account per minute (a maximum of 500,000 data rows)</td>
</tr>
<tr>
<td></td>
<td>A warning is triggered upon reaching 450 requests</td>
</tr>
<tr>
<td>Per 24–Hour Request Limit</td>
<td>10,000 requests per account per day (a maximum of 10,000,000 data rows)</td>
</tr>
<tr>
<td></td>
<td>A warning is triggered upon reaching 8,000 requests</td>
</tr>
</tbody>
</table>

A warning message is sent to the account administrator once a day if a warning has been triggered during the day.

**Note:** To adjust your account's limits, please contact your OpenAir Sales Representative or OpenAir Support.
Publishing Your OpenAir Saved Reports to OData

You can publish OpenAir Saved reports in OpenAir if you have the OpenAir Business Intelligence Connector enabled for your account and you have the Publish reports role permission.

- Publishing Saved Reports to OpenAir’s OData Feed
- Deleting Published OpenAir Report Data

Publishing Saved Reports to OpenAir’s OData Feed

Reports can be published manually, or you can automatically publish scheduled reports using the Publish to OData Server option in the Schedule Report form.

To manually publish a report to OpenAir’s OData feed and export the data to your Business Intelligence tool:

1. Go to Reports > Saved reports and click the Publish icon in the Action column for the report with the data you want.

2. Click Publish in the Publish Status window.
Note: The OData resource name indicates which report ID your published report will use (for example, report73 in the screenshot above). The Report ID is used to identify the report in your business intelligence tool.

3. Open your Business Intelligence tool and import the data according to the tool's instructions (See Importing Your Data Into Business Intelligence Tools for examples).

You can also automatically publish scheduled reports to OpenAir’s OData feed. Scheduled reports are published at the interval you set, with a minimum interval of 24 hours.

To automatically publish a scheduled report to OpenAir’s OData feed and export the data to your Business Intelligence tool:

1. Go to Reports > Saved reports and click the Schedule icon in the Action column for the report with the data you want.

2. In the General section of the Schedule Report form, select Publish to OData Server and click Save.
3. Open your Business Intelligence tool and import the data according to the tool's instructions.

**Note:** When publishing a report with collapsible levels (for example, with a Client column under which different Projects may roll up under), click *show all* in the report in OpenAir to include each sub-category in the published data, and *hide all* to exclude each sub-category and only include the totals for the main level.

**Tip:** Report data exported to a CSV file is saved as text, even if the values were numbers in OpenAir; however, reports published and accessed through OData preserve the data's original data type.

### Deleting Published OpenAir Report Data

Data from published OpenAir reports is stored on your account's OData server space. To delete published data from the server space, you must delete the report from your saved reports in OpenAir.

**To delete published OpenAir report data from your account's OData server space:**

1. In OpenAir, go to Reports > Saved reports.
2. Click the Delete icon next to the saved report you want to unpublish.
3. Click OK to confirm the deletion.

The saved report's data will no longer be available through your OpenAir OData feed.

**Note:** Data which has been cached in your business intelligence tool will still be available for use; however, you will not be able to update this data once the saved report it was sourced from has been deleted.
Publishing Your OpenAir Shared Reports To OData

You can publish OpenAir Shared reports in OpenAir if you have the **OpenAir Business Intelligence Connector** enabled for your account and you have the **Publish Shared Reports using OpenAir BI Connector** feature enabled. This feature enables the **Enable publishing of shared reports to OData service with owner's permissions** and **Enable publishing of shared reports to OData service with recipient's permissions** role permissions allowing users to publish shared reports.

- **Publishing OpenAir Shared Reports with Business Intelligence Connector**

**Publishing OpenAir Shared Reports with Business Intelligence Connector**

Use this feature to publish your shared reports with owner or recipient access privileges.

Shared reports can be published with the same data access privileges as the report owner, or restricted to the access privileges of each report recipient.

The report owner decides when they publish the report, and the administrator controls the publish policy with role permissions.

**Note:** To enable this feature, please contact OpenAir Support and request the **Publish Shared Reports using OpenAir BI Connector** feature. This feature enables the **Enable publishing of shared reports to OData service with owner's permissions** and **Enable publishing of shared reports to OData service with recipient's permissions** role permissions, which allow users to publish shared reports.

**Options for Publishing Shared Reports**

There are three options for publishing a shared report.

**Do Not Share**

The default option when publishing a shared report is **Do not share**, which only makes the report data accessible to the report owner through the Business Intelligence Connector. This is equivalent to publishing a report which has not been shared with other users.

To publish a shared report with the report owner's data access privileges but not share it with recipients:

1. Go to Reports > Saved Reports > Shared Reports and click the Publish icon next to the report you want to publish.
2. In the Publish window, select the **Do not share** option.
3. Click **Publish**.
Share With Recipient’s Permissions

The second option is to Share with recipient’s permissions. If you select the Share with recipient’s permissions option, the report data is accessible to users who can access the shared report, however, they can only see data allowed by their permissions. This is equivalent to each recipient saving a copy of the shared report and then publishing their copy. Only administrators or users with the Enable publishing of shared reports to OData service with recipient’s permissions role permission can use this feature.

**Note:** With this option, each recipient must publish the shared report data from OpenAir into their business intelligence tool. To access the report, recipients must have the Publish Reports role permission to access the report in their business intelligence tool. The data recipients see in the business intelligence tool will be limited to what their own respective privileges allow.

**To publish a shared report with recipients’ privileges:**

1. Go to Reports > Saved Reports > Shared Reports and click the Publish icon next to the report you want to publish.
2. In the Publish window, select the Share with recipient’s permissions option.
3. Click Publish.
Share With Owner’s Permissions

The third option is to **Share with owner’s permissions**. This option publishes exactly the same data which the owner of the report can access.

⚠️ **Warning:** Use this option with caution as users may see data which they should not be allowed to have access to!

To access the report, recipients must have either the **Download Reports** or the **Publish Reports** permission to access the report in their business intelligence tool. They will see the data in their business intelligence tool automatically after the owner publishes the report.

This option is equivalent to the owner emailing a PDF of the report to the shared users. Only administrators or users with the **Enable publishing of shared reports to OData service with owner’s permissions** role permission can use this feature.

**To publish a shared report with owner’s privileges and automatically share the data with recipients:**

1. Go to Reports > Saved Reports > Shared Reports and click the Publish icon next to the report you want to publish.
2. In the Publish window, select the **Share with owner’s permissions** option.
3. Click **Publish**.
### Publish

<table>
<thead>
<tr>
<th>Publish status</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Report name</td>
<td>6.1 Leave Accrual Summary PAR</td>
</tr>
<tr>
<td>Status</td>
<td>Successfully published</td>
</tr>
<tr>
<td>Last published</td>
<td>03/16/18 02:22 PM</td>
</tr>
<tr>
<td>Rows of data</td>
<td>61</td>
</tr>
<tr>
<td>OData service URL</td>
<td><a href="https://www.openair.com/odata/v4/reports/">https://www.openair.com/odata/v4/reports/</a></td>
</tr>
<tr>
<td>OData resource name</td>
<td>report82</td>
</tr>
</tbody>
</table>

**Permissions setting for OData Server**

- [ ] Do not share
- [x] Share with recipient’s permissions
- [ ] Share with owner’s permissions
Publishing OpenAir List Views To OData

You can publish List Views configurations in OpenAir if you have the OpenAir Business Intelligence Connector enabled for your account and you have the Publish ListView via OData role permission.

- Publishing OpenAir List Views with Business Intelligence Connector

Publishing OpenAir List Views with Business Intelligence Connector

Access data in real-time by simply setting up and publishing an OpenAir list view.

Simply create and save a list view configuration with a publish setting. List views can be published as private to the owner or public. Load your list view data into your business intelligence tool just as easily as report data. Updates to lists are available instantly to your connected business intelligence tool. The feature is currently supported for Booking, Project and Project Task.

To publish an OpenAir List View to your Business Intelligence tool:

1. Setup your required list view configuration and select "Save as...".

2. Give the list view a name and then select a PUBLISHING TO BI CONNECTOR option.
Note: To see these options you need to have the Business Intelligence Connector enabled for your account. You also need to be an admin or a user with the Publish ListView via OData role permission.

There are three publish options:

- **Do not publish** — the list view will not be published (this is the default setting).
- **Publish as private** — the list view will be published, but only the user publishing it can access the data.
- **Publish as public** — the list view will be published and available for any user to access. This option respects role permissions and rules for data access, so users can only see data which their role allows them to see.

3. Open your Business Intelligence tool and import the data according to the tool's instructions (See Importing Your Data Into Business Intelligence Tools for examples).
Importing Your Data Into Business Intelligence Tools

The following examples illustrate how to import your published report data into selected compatible business intelligence tools.

- Importing Your Published Report Data to Microsoft Excel
- Importing Your Published Report Data to Microsoft PowerBI

To import your data from OpenAir into any business intelligence tool, you will need the following login information:

<table>
<thead>
<tr>
<th>Location of the data feed in your OpenAir account</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://www.openair.com/odata/v4/reports/">https://www.openair.com/odata/v4/reports/</a></td>
<td></td>
</tr>
<tr>
<td><a href="https://www.openair.com/odata/v4/listviews/">https://www.openair.com/odata/v4/listviews/</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location of the data feed in your OpenAir sandbox account (optional)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://sandbox.openair.com/odata/v4/reports/">https://sandbox.openair.com/odata/v4/reports/</a></td>
<td></td>
</tr>
<tr>
<td><a href="https://sandbox.openair.com/odata/v4/listviews/">https://sandbox.openair.com/odata/v4/listviews/</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location of the data feed in your OpenAir demo account (optional)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://demo.openair.com/odata/v4/reports/">https://demo.openair.com/odata/v4/reports/</a></td>
<td></td>
</tr>
<tr>
<td><a href="https://demo.openair.com/odata/v4/listviews/">https://demo.openair.com/odata/v4/listviews/</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OpenAir User Name</th>
<th>COMPANY\USERID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(for example, Honeycomb\mcollins)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Password</th>
<th>Your OpenAir password</th>
</tr>
</thead>
</table>

Importing Your Published Report Data to Microsoft Excel

This example uses Microsoft Excel 2016 MSO 32-bit. Other versions of Microsoft Excel may not be able to use this functionality. Please see Features and Limitations for specifications which your BI tool must meet to use the OpenAir Business Intelligence Connector.

To import your published report data to Microsoft Excel:

1. In Microsoft Excel, click the Data tab.
2. Click New Query, point to From Other Sources and select From OData Feed.
3. Select the Basic radio button, type the OpenAir URL for your OpenAir feed, OpenAir Sandbox feed, or OpenAir Demo feed (see Importing Your Data Into Business Intelligence Tools) and click OK.

4. In the OData feed window, click the Basic tab and type your CompanyID\UserID in the User name field, and your password in the Password Field.

5. (Optional) Change the level to apply your login settings to. You can also use the default.

6. Click Connect.
7. The Navigator lists the published reports from your account by their ReportID, and a list of importable reports. Click the report to load and click **Load**. To load multiple reports, select the **Select multiple items** option, select which reports you want to load and click **Load**.

Your data will now be available in Microsoft Excel. If you've loaded multiple reports, they will appear in the Workbook Queries list on the right side of the screen. Double click any report in this list to open it in the Query Editor, which you can use to copy data into Excel spreadsheets.
Importing Your Published Report Data to Microsoft PowerBI

This example uses Microsoft PowerBI Desktop version 2.51.488.701 64–bit. Other versions of Microsoft PowerBI may not be able to use this functionality. Please see Features and Limitations for specifications which your BI tool must meet to use the OpenAir Business Intelligence Connector.

To import your published report data to Microsoft PowerBI:

1. In Microsoft PowerBI, click the Home tab, click Get Data and click OData Feed.

2. In the OData feed window, click the Basic radio button, type the OpenAir URL for your OpenAir feed, OpenAir Sandbox feed, or OpenAir Demo feed (see Importing Your Data Into Business Intelligence Tools) and click OK.

3. In the OData feed window, click the Basic tab and type your CompanyID\UserId in the User name field, and your password in the Password Field.
4. (Optional) Change the level to apply your login settings to. You can also use the default.

5. Click **Connect**.

6. The Navigator lists the published reports from your account by their ReportID, and a list of importable reports. As you click individual reports, a preview of the reports and data appears in the right side of the Navigator. Select the report to load and click **Load**. To load multiple reports, select which reports you want to load and click **Load**.

PowerBI will load all of your selected reports and makes them available in the **Fields** toolbar. Click on a report to open its fields, and select which fields you would like to include in your reports.

**Tip:** Some applications can cache the data read from an OData feed. For example, in Microsoft PowerBI, click the **More options** icon to the right of a report name or field and click **Refresh data** to read the latest report data.
OpenAir Business Intelligence Connector Advanced Functions

This chapter details advanced functions which you can use to get more out of your OpenAir saved reports data once you’ve published your reports to the OData database.

- Viewing Report Data in a Web Browser
- OData Query Options
- Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata

Viewing Report Data in a Web Browser

To view the report data for a published report in a web browser, type the url for your OpenAir feed, OpenAir Sandbox feed, or OpenAir Demo feed into your browser, with the report ID from OpenAir. For example:

To view the report data for a published report in a web browser:

1. Type the url for your OpenAir feed, OpenAir Sandbox feed, or OpenAir Demo feed into your browser, with the report ID from OpenAir. For example:
   https://www.openair.com/odata/v4/reports/report54

   **Note:** The OData resource name from the Publish screen in OpenAir indicates which report ID your published report will use (for example, report54 in the screenshot below).

2. In the Authentication required window, type your companyid\username and password and click Log in.
Your data will open in your browser.

<table>
<thead>
<tr>
<th>Query Option</th>
<th>What it does</th>
</tr>
</thead>
<tbody>
<tr>
<td>$top</td>
<td>Specifies how many records to return</td>
</tr>
<tr>
<td>$skip</td>
<td>Specifies the number of records to ignore before returning records</td>
</tr>
</tbody>
</table>

Example

If the following URL is typed into a browser:


The browser will skip the first 10 records and return the next 20 records.
Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata

With this feature, all non-alphanumeric characters in your data feed's column titles and metadata are replaced with underscores. When enabled, space characters in column titles are replaced with underscore characters.

**Note:** To enable this feature, please contact OpenAir Support and request the Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata feature.

Other special characters are also replaced with underscores, including: %?!@:~`+-#$^ &*()ů!§¨|  

**Note:** To ensure compatibility, non-alphanumeric characters from other language sets are also replaced with underscores, for example:

### or Кирилица

would also be replaced with underscores.
Frequently Asked Questions About the OpenAir Business Intelligence Connector

What is the OpenAir Business Intelligence Connector?

The OpenAir Business Intelligence Connector is an OData connection point supported by many reporting, business intelligence, workflow, and integration applications. This connection point lets you easily configure any compatible application to use the connection point without the need for programming. OData (Open Data Protocol) is an ISO/IEC approved, OASIS standard. See http://www.odata.org for more details on the OData standard.

What can I do with the OpenAir Business Intelligence Connector?

The OpenAir Business Intelligence Connector enables you to publish the content of your saved reports so they can be read by a compatible application. This provides a convenient way to access data presented by reports including calculated values. You can scheduled reports to automatically publish the data when the report runs.

How secure is the OpenAir Business Intelligence Connector?

The OpenAir Business Intelligence Connector follows OpenAir security best practices. You access the connector using your OpenAir security credentials and can only see the saved reports available to your OpenAir permissions settings. The OpenAir Business Intelligence Connector needs to be enabled to be available. Administrators can control access to the publish feature to users by role permissions.

What applications does the OpenAir Business Intelligence Connector support?

The OpenAir Business Intelligence Connector uses the OData V4/JSON standard and supports any compliant application. Applications that use older versions of the OData standard or do not support JSON may not be able to use the connection point.

Can I use the OpenAir Business Intelligence Connector as an API?

Yes, programmers can write applications that send requests and receive responses as defined in the OData standard. See http://www.odata.org/getting-started/basic-tutorial for more details.

What are the known limitations of the OpenAir Business Intelligence Connector?

- You need to run and publish a report to make the data available
- Only the $top and $skip system query options are available
- The Connector does not support OData versions prior to V4 and does not support ATOM
Troubleshooting the OpenAir Business Intelligence Connector

This chapter will help you to diagnose errors which you might encounter when using the OpenAir Business Intelligence Connector, and offer solutions to help you resolve them.

I can’t see a “Publish reports” role permission when I go to Administration > Global Settings > Users > Roles > [Select a role]

The Publish reports role permission is only available if your company has purchased the use of the OpenAir Business Intelligence (BI) Connector and OpenAir Support has completed the setup for your BI Connector account.

If you cannot see the Publish reports role permission, first contact your OpenAir Sales Representative and ensure that you have purchased access to this feature.

If you have confirmed that your company should have access to this feature, contact OpenAir Support and confirm that they have finished setting up the feature for your account.

There is no “Publish” icon next to my saved reports.

You won’t be able to publish reports if your company’s administrator hasn’t assigned you the Publish reports role permission.

Confirm that your company’s administrator has assigned you the Publish reports role permission.

My business intelligence tool can’t authenticate my credentials.

If you receive a message from your business intelligence tool saying that it cannot authenticate your credentials, you may have incorrectly typed your OpenAir OData feed’s address, the Company ID and User Name, or password, or are using the wrong credentials for your OData feed.

Confirm that you have entered the correct OpenAir OData feed address, Company ID, User Name, and Password.
My credentials and OpenAir OData feed’s address are correct, but I still get an error message from my business intelligence tool.

This problem is known to occur with some versions of Microsoft Excel. It’s possible that Excel is trying to connect to your OData feed as a V3 service and not a V4 service, and since V3 services are incompatible with the OpenAir Business Intelligence Connector, you will receive an error.

If using Microsoft Excel to connect to your OpenAir OData feed, be sure to select the feed by going to the Data tab, then clicking New Query > From Other Sources > From OData Feed. Selecting any other options for connecting to the feed will result in an error.

My report doesn’t appear in the list of published reports in my business intelligence tool.

Each published report has a unique ID number which identifies it. OpenAir provides this report ID in the OData resource name field when you publish the report. For example, in the screenshot below, the report ID is report54:
First, confirm that you are looking for the correct report ID. If the report ID is correct, confirm that you have published the report.

If the report is a scheduled report, confirm that it has been published according to its schedule.

**My report data appears out of date in my business intelligence tool.**

This can occur if your business intelligence tool caches report data.

To be sure that you have the latest report data, use your business intelligence tool's refresh option to pull the latest data.

**Report data which I could previously see is now gone.**

This can happen if a report you previously loaded was deleted.

To see the report's data, publish the report again and re-load it into your business intelligence tool.
OpenAir Business Intelligence Connector Version History

October 13, 2018
- Added ability to publish List View configurations. See Publishing OpenAir List Views To OData.
- Increased the Per Minute Request Limit to 500 requests per account per minute (up from 70 requests per minute). See OpenAir Business Intelligence Connector Request Limits.

April 14, 2018
- Added ability to publish Shared reports. See Publishing Your OpenAir Shared Reports To OData.
- Added Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata.

October 14, 2017
- OpenAir Business Intelligence Connector introduced.
- Added ability to publish saved and shared reports to OData feed.
- Added $top and $skip query options.
- Added ability to access OpenAir OData feed data in browser.