# Table of Contents

Introduction to the Optional Features Book .............................................................................. 1  
Requesting a New Feature by Creating a Support Case ................................................................. 1  
Global ........................................................................................................................................ 4  
  - Accounting Period Functionality ............................................................................................. 5  
  - Active Directory Integration ................................................................................................... 6  
  - Allow an Administrator to Edit the Exchange Cross Rate Table ........................................... 6  
  - Allow the Owner/Requester/Administrator to Upload Attachments for Approved Objects ..... 7  
  - Assign Project Job Codes for Users on a Per Project Basis ..................................................... 8  
  - Automatic Backup Service Confirmation on File Transfer Completion ............................... 9  
  - Automatic Backup Service (ABS) MySQL Import File "Apply Relationships" Option ............. 9  
  - Automatic Backup Service (ABS) MySQL Import File UTF-8 Option .................................. 10  
  - Automatic Backup Service (ABS) Implicit and Explicit FTPS Transfers ................................ 10  
  - Conditional Dropdown Custom Fields ..................................................................................... 11  
  - Configure Customized Email Notifications ............................................................................ 12  
  - Custom Field Allocation Worksheets ....................................................................................... 12  
  - Custom Field Pick List ............................................................................................................ 12  
  - Custom Form Layouts .............................................................................................................. 13  
  - Customization Center ............................................................................................................. 14  
  - Display Contacts in "Last Name, First Name" Format in Drop-down Menus ............................. 14  
  - Display the Booking's Requester Name in "Last Name, First Name Middle Name" Format in Reports .......................................................................................................................... 15  
  - Enable Integration with NetSuite ........................................................................................... 15  
  - Export XSD Schema Files ....................................................................................................... 17  
  - Feature-Specific User Satisfaction Feedback Form .................................................................. 17  
  - Generate Account Specific WSDL ......................................................................................... 18  
  - Hide Divider Sections on Forms ............................................................................................ 18  
  - Increase the Maximum Count of NetSuite Integration Schedule Runs Per Day ................... 19  
  - Multiple Schedule Exceptions Per Day via Time Off Requests ............................................. 19  
  - OpenAir Help Center ............................................................................................................. 20  
  - New Selector for Customizing List Views ............................................................................... 22  
  - OpenAir Business Intelligence Connector ............................................................................. 23  
  - Overlapping Timesheets and Envelopes at the Role Level .................................................... 24  
  - Performance Console ............................................................................................................. 25  
  - Publish Shared Reports using OpenAir BI Connector ............................................................ 25  
  - Query Builder ......................................................................................................................... 26  
  - QuickViews for Bookings ........................................................................................................ 27  
  - QuickViews for Employees .................................................................................................... 27  
  - QuickViews for Projects ......................................................................................................... 28  
  - QuickViews for Tasks ........................................................................................................... 28  
  - QuickView Customization Options ........................................................................................ 29  
  - Redesigned OpenAir User Experience .................................................................................. 29  
  - Redesigned OpenAir User Experience Phase 2 .................................................................... 30  
  - Redesigned OpenAir User Experience Phase 3 ................................................................... 34  
  - Restrict Specific Custom Fields from Being Copied ................................................................ 35  
  - Save List View Configurations ............................................................................................... 35  
  - Select Period for Attachments Backup in Automatic Backup System (ABS) ......................... 36  
  - Single Sign-On Integration Leveraging SAML ....................................................................... 36  
  - Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata ....... 37  
  - Stop Slow Lists ...................................................................................................................... 37  
  - Stop Slow Reports ................................................................................................................. 38  
  - Suppress Email Notifications or Add Addresses to Notifications ......................................... 38  
  - Un-export Records from a Specific Application via UI .......................................................... 39  
  - Use Days Instead of Hours for All Time Entries ................................................................... 40
<table>
<thead>
<tr>
<th>Topics</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Booking Specific Approvers</td>
<td>80</td>
</tr>
<tr>
<td>Add Multiple Profiles</td>
<td>81</td>
</tr>
<tr>
<td>Advanced Booking Worksheet</td>
<td>82</td>
</tr>
<tr>
<td>Auto-Create Bookings for Generic Resources</td>
<td>83</td>
</tr>
<tr>
<td>Booking Assignment Date Filters</td>
<td>83</td>
</tr>
<tr>
<td>Bulk Booking Editor</td>
<td>84</td>
</tr>
<tr>
<td>Bulk Delete Action Respects Booking Rules</td>
<td>84</td>
</tr>
<tr>
<td>Consolidated Resource Profiles</td>
<td>85</td>
</tr>
<tr>
<td>Custom Booking Approvals Notifications</td>
<td>86</td>
</tr>
<tr>
<td>Customizable Skill Level Descriptions</td>
<td>87</td>
</tr>
<tr>
<td>Customize Resource Compare View Header</td>
<td>87</td>
</tr>
<tr>
<td>Customized User Avatars</td>
<td>88</td>
</tr>
<tr>
<td>Decouple RDR Header and RRQ Booking Type</td>
<td>89</td>
</tr>
<tr>
<td>Disable New, Multiple Bookings Option</td>
<td>89</td>
</tr>
<tr>
<td>Display More Bookings in Advanced Booking Worksheet</td>
<td>90</td>
</tr>
<tr>
<td>Edit Resource Demand Requests After Submittal</td>
<td>90</td>
</tr>
<tr>
<td>Enable a Booking Type to Exist in All Approval Statuses</td>
<td>91</td>
</tr>
<tr>
<td>Enable Bookings to be Auto-Approved</td>
<td>91</td>
</tr>
<tr>
<td>Extended Project Assignment Profile Option</td>
<td>91</td>
</tr>
<tr>
<td>Optional Booking on Approved Booking Requests</td>
<td>92</td>
</tr>
<tr>
<td>Profile Type Security Access</td>
<td>92</td>
</tr>
<tr>
<td>&quot;Require Job Code&quot; Setting for Dynamic and Advanced Booking Worksheets</td>
<td>92</td>
</tr>
<tr>
<td>Resource Booking Approvals</td>
<td>93</td>
</tr>
<tr>
<td>Resource Compare View</td>
<td>93</td>
</tr>
<tr>
<td>Resource Demand Request (RDR)</td>
<td>94</td>
</tr>
<tr>
<td>Resource Demand Request “Essential” Category for Search Base Criteria</td>
<td>95</td>
</tr>
<tr>
<td>Resource Demand Request Queues Cannot be Finalized If Availability is Zero</td>
<td>96</td>
</tr>
<tr>
<td>Resource Planner</td>
<td>96</td>
</tr>
<tr>
<td>Restricted Skills in Consolidated Resource Profile</td>
<td>97</td>
</tr>
<tr>
<td>Show Project Assignment Profiles on Task Assignments</td>
<td>97</td>
</tr>
<tr>
<td>Skills Approvals</td>
<td>98</td>
</tr>
<tr>
<td>Use Booking Request Grid to Enter Multiple Requests That Are Available</td>
<td>98</td>
</tr>
<tr>
<td>Invoices</td>
<td>100</td>
</tr>
<tr>
<td>Additional Option for Invoice Layout Terminology Overrides</td>
<td>100</td>
</tr>
<tr>
<td>Advanced Agreement and Customer PO Balance Calculation</td>
<td>101</td>
</tr>
<tr>
<td>Allow an Approver to Edit a Submitted Invoice</td>
<td>102</td>
</tr>
<tr>
<td>Credit and Re-Bill Functionality for Invoices</td>
<td>102</td>
</tr>
<tr>
<td>Display a Zero Sum Tax Rate and Amount on Invoices</td>
<td>103</td>
</tr>
<tr>
<td>Enhanced Workflow Process Invoice Submission and Revenue Container Creation</td>
<td>104</td>
</tr>
<tr>
<td>Forex Precision Control for Invoices</td>
<td>105</td>
</tr>
<tr>
<td>Generate Charges for Partial Periods</td>
<td>106</td>
</tr>
<tr>
<td>Ignore Booked Hours If Worked or Approved Hours Are Logged</td>
<td>107</td>
</tr>
<tr>
<td>Include “Time Entry Payroll Type” in Invoices</td>
<td>107</td>
</tr>
<tr>
<td>Negative Charge Stages</td>
<td>108</td>
</tr>
<tr>
<td>Negative Charge Stages by Quantity</td>
<td>108</td>
</tr>
<tr>
<td>Prevent Invoicing and Revenue Recognition Per Customer PO and Agreement</td>
<td>109</td>
</tr>
</tbody>
</table>
Pro-Rate Selected Charges ........................................................................................................ 110
Revenue Recognition Projections Prioritize Logged Time Over Booked Time ......................... 111
Set Credit Invoice Date When Creating Invoices for Credit/Rebill ............................................... 111
Subtotal and Sort Expense Item Groups on Invoices .......................................................... 111
Reports ........................................................................................................................................ 113
Audit Trail Values Available in Summary Reports .................................................................... 113
Contact Information Fields on Tabular and Crosstabbed Reports and List Views .................. 114
CSV Pivot Tables Can Respect User Regional Settings ............................................................ 115
Custom Fields Available as Filters in Selected Reports ............................................................ 116
Email Scheduled Reports to a Contact from the Contacts List .................................................. 116
Enable Booking Approval Status in Reports .............................................................................. 116
Exclude Specific Values from Filters in Reports ......................................................................... 117
Hide Personal User Data and Hours Remaining in the Timesheet Report .................................. 118
Loaded Cost Respects Time Entry Date Regardless of Date to Use Value in Reports .................. 119
Meta-Values in Entity Filters .................................................................................................... 119
Next-Generation Report Editor ................................................................................................. 120
Organize Saved Reports in Specified Folder ............................................................................. 121
Project Hierarchy Settings in User Detail Report ....................................................................... 122
Project Crosstab Date Filters ................................................................................................... 122
Report Management ................................................................................................................ 122
Report on More than 31 Days When Reporting on Daily Time Periods ..................................... 123
Report Throttling ...................................................................................................................... 123
Web Services Log Details Report .............................................................................................. 124
Platform ...................................................................................................................................... 125
Form Scripts ........................................................................................................................... 125
Scheduled Scripts .................................................................................................................... 125
Script Deployment Logs ......................................................................................................... 126
Scripting Center ........................................................................................................................ 127
Scripting Studio ......................................................................................................................... 128
Script Support for Web Service API Methods .......................................................................... 129
Script Support for HTTPS Methods ......................................................................................... 129
Unapprove Event ....................................................................................................................... 130
User Scripting ........................................................................................................................... 131
NS Connector .......................................................................................................................... 133
High-Frequency Real-Time Support .......................................................................................... 133
Import Taxes Applied to Exported OpenAir Credits .................................................................... 133
Integrate All Viable Time Entries ............................................................................................... 134
Maximum Number of Threads Used by NS Connector ............................................................... 134
New NS Connector UI ............................................................................................................... 134
NS Connector Import/Export Settings ....................................................................................... 135
OpenAir Revenue Recognition Rules and Transactions with NetSuite Advanced Revenue Management (ARM) .................................................................................................................. 136
Purchase Requests Integrated on Approval ............................................................................... 137
Token-Based Authentication (TBA) for NS Connector ................................................................. 137
Use TBA Authentication Exclusively ....................................................................................... 138
Release History ........................................................................................................................ 139
Introduction to the Optional Features Book

OpenAir is highly configurable. You can set personal settings to tailor the system according to the way you prefer it to work. Administrators can also configure the company settings to tailor the system according to company business processes; see the OpenAir Administration Guide for details.

Professional Services can set the necessary internal switches when your OpenAir account is configured. If you decide to take advantage of additional functionality, you can create a support ticket to OpenAir Support and request that an internal switch be enabled in your account.

This guide describes optional features that can be switched on in your account. Each section indicates if a feature requires you to contact OpenAir Support to enable it. Features which your administrators can enable contain instructions to set the feature up.

- Requesting a New Feature by Creating a Support Case
- Global
- Timesheets
- Expenses
- Projects
- Resources
- Invoices
- Reports
- Platform
- NS Connector
- Release History

Requesting a New Feature by Creating a Support Case

To request features which require OpenAir Support to change internal account settings, such as many features within the OpenAir Optional Features Book, you must create an OpenAir Support Case in SuiteAnswers.

To request a new feature by creating a Support Case:

1. Log into your OpenAir account.
2. Click Support in the User Center.
3. Click Go to SuiteAnswers.
4. In the "Ask a Question" sidebar under "Submit a Case", click Contact Support Online.

5. On the "Enter keywords related to your question" screen, type the name of the feature you want to enable in the search field, and click Search.
6. Click Continue to Create Case... above the search results.
7. On the "Create Case" form, enter the following information in the available fields:
   - In the "What would you like to do" dropdown list, select "Ask a question" or "Enable/disable switch".
   - In the "Case Severity" dropdown list, select "C3 — How To / Non Urgent questions".
   - In the "Subject" field, type "Internal Switch — [name of feature you want to enable]".
   - In the "Details" field, type the feature you want enabled, which accounts you want it enabled for (for example, Production or Sandbox accounts), and which Company IDs to use if you have multiple Sandbox accounts.
In the “Product Area” dropdown list, select “OpenAir Web Application”.
In the “Feature” dropdown list, select “Switch Activation/Deactivation Requests”.
Do not enter anything into the “Attach Document” field.
In the “Email” field, type your email.

**Note:** Requests to enable or disable account-wide features in OpenAir can only be processed when an administrator’s email address is entered in this field.

In the “Phone (Optional)” field, type a phone number where you can be contacted if you would prefer OpenAir Support contacts you by telephone. Please include your country code and enter the number without any spaces.

8. Click **Submit**.

When you have submitted the case, OpenAir Support will contact you to confirm they have received the case, and will request additional information if necessary or guide you through any additional steps, such as setting up roles for the feature.
Global

The following optional Global features are available in OpenAir. Some features require OpenAir Support to enable them for you.

- Accounting Period Functionality
- Active Directory Integration
- Allow an Administrator to Edit the Exchange Cross Rate Table
- Allow the Owner/Requester/Administrator to Upload Attachments for Approved Objects
- Assign Project Job Codes for Users on a Per Project Basis
- Automatic Backup Service Confirmation on File Transfer Completion
- Automatic Backup Service (ABS) MySQL Import File “Apply Relationships” Option
- Automatic Backup Service (ABS) MySQL Import File UTF-8 Option
- Automatic Backup Service (ABS) Implicit and Explicit FTPS Transfers
- Conditional Dropdown Custom Fields
- Configure Customized Email Notifications
- Custom Field Allocation Worksheets
- Custom Field Pick List
- Custom Form Layouts
- Customization Center
- Display Contacts in “Last Name, First Name” Format in Drop-down Menus
- Display the Booking’s Requester Name in “Last Name, First Name Middle Name” Format in Reports
- Enable Integration with NetSuite
- Export XSD Schema Files
- Feature-Specific User Satisfaction Feedback Form
- Generate Account Specific WSDL
- Hide Divider Sections on Forms
- Increase the Maximum Count of NetSuite Integration Schedule Runs Per Day
- Multiple Schedule Exceptions Per Day via Time Off Requests
- OpenAir Help Center
- New Selector for Customizing List Views
- OpenAir Business Intelligence Connector
- Overlapping Timesheets and Envelopes at the Role Level
- Performance Console
- Publish Shared Reports using OpenAir BI Connector
- Query Builder
- QuickViews for Bookings
- QuickViews for Employees
- QuickViews for Projects
Accounting Period Functionality

By enabling this feature, separate accounting dates can be associated with most transactions, with reports drawing from these accounting dates. The ability to maintain separate accounting dates can be particularly useful when the original transaction date of an entity must be independent from the date, as signified by a financial report or general ledger application.

For example, the charges on an invoice dated July 5th may need to be associated with the month of June in the general ledger, as the charges were incurred in this month. The invoice transaction date would be 07/05/09, however, the invoice accounting date might be 06/01/09.

In another example, a receipt incurred in March may need to be posted to the financial system in June. In this example, the receipt transaction date might be 03/17/09, while the receipt's accounting date might be 06/01/09. The new accounting period functionality lets users to associate an additional independent accounting date with a transaction. Reports can then be configured to leverage the accounting dates, rather than the original transaction dates.

To enable this feature, please contact OpenAir Support!
Active Directory Integration

Companies that are using an Active Directory (AD) server can validate OpenAir User IDs and passwords using this feature against that AD database. With the proper firewall configuration, the AD server can connect to OpenAir. There is also an option to use SSL to encrypt the connection.

To enable this feature, please contact OpenAir Support!

Allow an Administrator to Edit the Exchange Cross Rate Table

Enable this feature to allow an Administrator to edit the cross rate table.

When enabled, the cross exchange rates (forex table) can be modified. If you have entered a currency override rate in the “Set Exchange rates” form, this will take care of the FUTURE rate. If date ranges outside the current dates are entered the forex table will automatically be extended to cover those
ranges. The extensions will be done using the current PAST or FUTURE rates dependant on the direction of the extension.

To enable this feature, please contact OpenAir Support!

Allow the Owner/Requester/Administrator to Upload Attachments for Approved Objects

This feature permits an owner/requester/administrator to manage the attachments for an approved object. Eligible objects include

- Authorizations
- Bookings
- Booking requests
- Deal booking requests
- Envelopes
- Invoices
- Proposals
- Purchase orders
- Purchase requests
- Schedule requests
- Receipts
- Timesheets

With this switch on, approved items can be downloaded, replaced, and deleted for the selected objects.
Assign Project Job Codes for Users on a Per Project Basis

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

After project job code rules have been configured, they can be linked to specific rate cards. Time billing rules can be configured to derive rates from rate cards. Thus, billing will occur based on the appropriate rate, as determined by the role an individual fulfilled for the project. Revenue recognition transactions generated from the As Billed revenue recognition rule will contain the appropriate job
Assign Project Job Codes for Users on a Per Project Basis

Code assigned stemming from the hourly charges created by Billing Rules. The billing and recognition transactions list view can be customized to include the associated project job code. For forecasting purposes, charge and revenue projections will use the assigned project job codes when using time entries, and calculate project job codes (via job code rules) when forecasting using billings or project/task level assignments.

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

To enable this feature, please contact OpenAir Support!

Automatic Backup Service Confirmation on File Transfer Completion

Receive a secondary status file after the ABS backup file has transferred. The status file contains the checksum of transferred file(s), file size, and the list of all tables.

To enable this feature, go to Administration > Global settings > Automatic backup service and select the “Include status file with backup” option in the “Other” section of the form.

Automatic Backup Service (ABS) MySQL Import File “Apply Relationships” Option

Create MySQL import files with relationships between tables.

When setting up the ABS import file options, select the “MySQL import file” and “Apply relationships” options. When your ABS import files are created, the table relationships will be added to the file.
To apply table relationships, the MySQL Import file contains statements to:

- Change the storage engine to “InnoDB”
- Change foreign key columns to allow null values
- Set “0”s in foreign keys to null values

To configure the ABS, go to Administration > Global Settings > Account > Automatic Backup Service.

**Automatic Backup Service (ABS) MySQL Import File UTF-8 Option**

Create MySQL import files with a default UTF-8 character set.

You can set the default CHARSET for your ABS MySQL import files to "UTF-8". When setting up the ABS import file options, select the “MySQL import file” and “UTF-8” options.

To configure the ABS, go to Administration > Global Settings > Account > Automatic Backup Service.

**Automatic Backup Service (ABS) Implicit and Explicit FTPS Transfers**

When ABS is enabled, you can select one of two FTPS transfer methods for receiving your data:

- **Implicit FTPS** — the server already expects everything encrypted in SSL
- **Explicit FTPS** — the server is immediately switched to SSL mode
Conditional Dropdown Custom Fields

OpenAir's custom field functionality lets you create user-defined fields specific to your company's needs. Custom fields with different associations can be created for fields that are not available in the application as a standard built-in field. Currently, custom fields on a form are independent of one another with no relational dependencies between two or more fields. With dropdown custom fields, you are able to select a value from a pre-defined list of options.

OpenAir has the ability for you to create value selection dependencies between two dropdown custom fields. The value selected in the first custom field will be able to limit the values displayed within the second custom field. After dependencies have been configured, the second custom field will dynamically appear on the form with the appropriate value choices. A single custom field can have dependencies with multiple custom fields. In addition to creating conditional dependencies between two custom fields, a value list editor is available. Leveraging drag-and-drop functionality, you can move the position of values within a single list.

To enable this feature, please contact OpenAir Support!
Configure Customized Email Notifications

Within the OpenAir application, there are many events that can occur where it may be beneficial to send an email notification to a user. For example, when a user is assigned to a task within a project, the project manager may choose to notify the user of this assignment. Or, if a booking has been created for a resource on a project, the booked user may be notified of the booking. In some cases, it may be beneficial to send a notification based on specific criteria. It may also be helpful to send the notification to select users as well as customize the body of the email to include additional information about the event.

This feature extends existing email notifications functionality. Within each application setting, there is a new Notifications area where the criteria, recipients, and email body can be configured. For example, a notification may be configured such that a new booking notification will only be sent to the booked user if the booking type is set to Requested. In addition to configuring the criteria, users can be selected as recipients of the email. The email body can be customized to include additional text as well. Multiple notifications may be configured.

**Note:** Customizable email notifications are available in Application Settings for Expenses, Invoices, Projects, Resources, and Timesheets.

To enable this feature, please contact OpenAir Support!

Custom Field Allocation Worksheets

With this feature enabled, you can create allocation grid custom fields.

To enable this feature, please contact OpenAir Support!

![Time Allocated to Each Client](image)

Custom Field Pick List

With this feature, create a custom field with values from existing list data within a OpenAir account such as users, customers, or projects. The benefit of this feature is that the pick list populates with current account data and thus eliminates the need for an administrator to actively manage the values list of the custom field.

To enable this feature, please contact OpenAir Support!
Custom Form Layouts

Customize form layouts and apply them by role!

Multiple fields can be selected and moved together. Dividers can also be moved and selected, and items can be moved between dividers. Compound objects with individual access settings are moved together as a block.

To create or change form layouts, click the Tips button and click "Modify form permissions". In the Form Permissions window, scroll to "Field order" and click > Create. In this window, you can set the order of fields within the layout.

Manage all of your custom form layouts by going to Administration > Customization > [Select a form] > Fields order
Custom Form Layouts

Optional Features Book

Customization Center

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

This provides the following advantages:

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

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

See the OpenAir Customization Guide for more details.

Display Contacts in “Last Name, First Name” Format in Drop-down Menus

This feature changes the contact display format to “Last name, First name” in dropdown menus, instead of using the default “First name Last name” format.
Display Contacts in “Last Name, First Name” Format in Drop-down Menus

To enable this feature, please contact OpenAir Support!

Display the Booking’s Requester Name in “Last Name, First Name Middle Name” Format in Reports

This feature displays the booking's requester name as "Last Name, First Name Middle Name" format in reports.

To enable this feature, please contact OpenAir Support!

Enable Integration with NetSuite

This feature enables an account to be integrated with NetSuite. When enabled, you will see the option "Integration : NetSuite" on the Administration > Global Settings page. Click to access the NetSuite Integration form.

See the OpenAir NS Connector Guide for details.
Tip: Using this feature adds many settings to the Tips button under the NetSuite Integration Admin option.

As of October 17, 2015, a new, more user-friendly NetSuite integration UI is also available.

Important: Enabling this switch will invalidate all of your existing mappings. After enabling the switch, you will need to re-set up all of the mappings again. We strongly recommend seeking assistance from PS when requesting this UI. We also advise first re-checking your existing mappings before setting up the new mappings.

To enable this feature, please contact OpenAir Support!
Export XSD Schema Files

Directly download the latest XSD schema files.

To export an XSD schema file:

1. Go to Administration > Global Settings > Account > Integration: Import/Export.
2. Under “Account data”, click the “XSD schema files” link. The system will generate a ZIP file with all of the XSD schema data.
3. Click the “Click here” link to download the XSD schema ZIP file.

Feature-Specific User Satisfaction Feedback Form

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

The feedback form is currently enabled for the following 3 features:

- Advanced Resource Search
- Consolidated Resource Profile
- Compare view

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

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

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

Users can postpone answering by clicking Show me later and the feedback form will pop up again 30 days later.
If the response is either negative (Somewhat dissatisfied / Extremely dissatisfied) or neutral (Neither satisfied nor dissatisfied), users are prompted for additional optional feedback.

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

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

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

---

**Generate Account Specific WSDL**

Get your WSDL file generated specifically per your account including custom fields. You can use a short URL to download the file automatically. To use this feature, go to Administration > Integration: Import/Export and click the “Account specific WSDL” link.

This feature has one related user role setting:

- Export data

**Note:** This feature will not be available if you have disabled all access to account data transfer or disabled account data transfer support.

To disable this feature, go to Administration > User > Access control and clear all “Exchange Access” options.

---

**Hide Divider Sections on Forms**

With each form that contains a link to Modify the form permissions, users have the option to hide entire sections. To hide sections, launch the form permissions from the Tips button, scroll down to
**Hidden divider sections**, and select the check box for the section to be hidden under the desired role. For example, in the Edit project form, select the check box for the “Attachments” section under the User role and Attachments will no longer display on a user’s Edit project form.

To enable this feature, please contact OpenAir Support!

![Hidden divider sections](image)

---

**Increase the Maximum Count of NetSuite Integration Schedule Runs Per Day**

With this feature, you can set the maximum allowed integration scheduled runs. The default is 10, and can be set to a maximum of 24 runs per day.

To enable this feature, please contact OpenAir Support!

![Netsuite integration](image)

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**Multiple Schedule Exceptions Per Day via Time Off Requests**

Companies often have varying holiday policies that allow for half or partial working days that occur the day before an official holiday. For example, some companies will allow for a half day the day before Christmas. In such a case, some employees may choose to take the rest of the day off as part of their personal time off (PTO).
Multiple Schedule Exceptions Per Day via Time Off Requests

For accounts that have the company setting “Automatically create schedule exceptions when a time off request is approved” enabled but don't have this feature enabled, a company schedule exception could be entered for the half day. However, in order for the user to take the rest of the day off, an exception on the user's work schedule would need to be manually created. With this feature, users can enter a time off request even if there is an existing company schedule exception for the same day.

If there is an existing company schedule exception for partial hours, users can create and submit a time off request for that same day (available time permitting). In addition, users can create and submit multiple time off requests for the same day.

**Note:** It is not possible to manually create more than one schedule exception on the same day for a company work schedule or an individual user level work schedule.

To enable this feature, please contact OpenAir Support!

OpenAir Help Center

Find the help you need from the Help link in the User Center.

The OpenAir Help Center is synchronized with OpenAir PDF guides and SuiteAnswers updates, and is presented in an easy-to-use interface.

The Help Center features a collapsible navigation pane to easily move between topics and breadcrumbs to show where you are within a topic. To collapse or expand a topic, click the + or – icons next to the topic.
You can also use breadcrumbs located at the top of a help article to navigate the Help Center. The breadcrumbs show where you are in a guide and topic. Click a topic in the breadcrumb and you will go to that article.

Search for specific topics and receive results ranked by how closely they match your search terms.

To search for exact search terms, use double quotes around the search term you want to find. For example, "project stage" will search for the term "project stage", but not "project" or "stage" individually.

Help topics can be printed for ease of reference. To print a Help Center article, click the Printer icon in the upper right corner of the article.

To access the Help Center, click the User Center and select "Help Center". The Help Center will open in a new tab or window, depending on your browser settings.
**Note:** When the Help Center is enabled, you must select which roles have access to it. To allow a role to access the Help Center, go to Administration > Global Settings > Users > Roles > [Select a role] > General Settings and select the “View Help Center” role permission.

To enable this feature, please contact OpenAir Support!

**New Selector for Customizing List Views**

The Columns Selector makes arranging your list views a snap!
Click the Columns button in any list view to open a Columns Selector menu. From here, you can select the columns you want to see in this list view. You can also click any column in the "Select All" list to instantly add it to the displayed columns. Additionally, you can drag a column to reposition it in the list.

Use the Search field to limit the columns which appear in both the "All" and "Selected" columns.

**Note:** The "Customize list view" in the Cog menu will still be available as an option for arranging columns.

To enable this feature, please contact OpenAir Support!

**OpenAir Business Intelligence Connector**

Connect your Business Intelligence tools directly to OpenAir with OData!
The OpenAir Business Intelligence Connector gives you point and click access to OpenAir data from existing reporting, business intelligence, workflow, and integration applications.

The Business Intelligence Connector provides the following features:

- Publish reports and provide access to the report data from OData.
- Publish list views giving users real-time access to OpenAir data with OData. User access rights configured in OpenAir are enforced preventing access to data the user does not have permission to see.
- Role permissions are supported to give administrators control over who can publish data.
- Access to published reports are available through the NSOA.report.list and NSOA.report.data user scripting functions.

See the OpenAir Business Intelligence Guide for more details.

**Note:** The Business Intelligence Connector only supports the latest version of OData V4 / JSON (Open Data Protocol).

To enable this feature, please contact your OpenAir Sales Representative. This feature does not support SAML and LDAPS users.

**Overlapping Timesheets and Envelopes at the Role Level**

With this feature, you can allow different roles to have access to the Overlapping Timesheets and Expense Reports feature.

To enable this feature, please contact OpenAir Support!
Performance Console

Avoid running auto-billing, auto-recognition, and project recalculation for completed projects. Set up criteria and OpenAir will manage whether to run these features or not.

With this feature, projects which have not created billing or revenue recognition transactions for several months will have their auto-billing and auto-recognition alerts run less frequently or will be deactivated by OpenAir. The default settings are:

- If no transactions have been created for the past 120 days, and the auto-run alert was set to run either every day, on the 1st and 15th of every month, or on the 15th and last day of the month, the auto-run alert is rescheduled to run only once per month.
- If no transactions have been created for 400 days, the auto-run alert is deactivated.

To use the Performance Console, navigate to Administration > Global Settings > Account > Performance. From here, you can adjust the thresholds for OpenAir to stop running auto-billing and auto-recognition.

You can also set criteria for when OpenAir will skip running project recalculations. This prevents OpenAir from performing recalculations which are no longer necessary, and improves performance.

**Note:** This feature is not optional and cannot be disabled; however, the thresholds for rescheduling can be adjusted. Administrators and users with the “Perform company maintenance functions” role permission can access the Performance Console.

Publish Shared Reports using OpenAir BI Connector

Publish your shared reports with owner or recipient access privileges and take control of the data you've published.

With this feature, 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.

When publishing reports with recipient permissions, each recipient must then publish the shared report data from OpenAir into their business intelligence tool. 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. The data recipients see in the business intelligence tool will be limited to what their own respective privileges allow.

Note: This feature enables the Enable publishing of shared reports to OData service with owner's permissions role permission, which allows users to publish shared reports.

To enable this feature, please contact OpenAir Support!

Query Builder

Use this feature to create complex and customized notifications for events throughout OpenAir!

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

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

Get more information instantly in any list view. Pointing to a booking brings up a QuickView window with context-appropriate details, and provides links to useful actions and quick navigation options.

To enable this feature, please contact OpenAir Support!

QuickViews for Employees

Get more information instantly in any list view. Pointing to a resource brings up a QuickView window with context-appropriate details, and provides links to useful actions and quick navigation options.

To enable this feature, please contact OpenAir Support!
QuickViews for Projects

Get more information instantly in any list view. Pointing to a project brings up a QuickView window with context-appropriate details, and provides links to useful actions and quick navigation options.

To enable this feature, please contact OpenAir Support!

<table>
<thead>
<tr>
<th>Project</th>
<th>Project owner</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All</td>
<td>All</td>
</tr>
</tbody>
</table>

QuickViews for Tasks

Get more information instantly in any list view. Pointing to a task brings up a QuickView window with context-appropriate details, and provides links to useful actions and quick navigation options.

To enable this feature, please contact OpenAir Support!
QuickView Customization Options

Configure the time it takes for a QuickView to appear when pointing to a screen element, or disable them entirely. QuickView options can be set at the user level or for the entire company by an administrator.

- To set the Account-wide popup delay: navigate to Administration > Global Settings > Display > Interface: Display > Display options > QuickView popup activation delay
- To set the User-level popup delay: navigate to Personal settings > Display options > QuickView popup activation delay
- To disable QuickViews at the User-level: navigate to Personal settings > Display options > Disable QuickView

Redesigned OpenAir User Experience

Experience OpenAir with a new, slick, and user-friendly interface.

OpenAir’s next generation navigation is being released in phases. Each phase must be enabled separately. Phase One is available in this release, and includes changes to the navigation bar, Create...
Redesigned OpenAir User Experience

Button, Tips and Resource Compare View icons, and User Center. The new design works especially well with tablets and smaller screen resolutions.

**Warning:** Please test this feature extensively on a sandbox account or during release preview before enabling it in your production account.

To enable this feature, please contact OpenAir Support!

Redesigned OpenAir User Experience Phase 2

With this feature, Project, Project Task, Booking, and Expense list views, and the toolbar have received a makeover, making them more user friendly and visually striking!

Main changes include:

- The list view content remains largely the same as in UI3. Changes include moving the *Run an action/Bulk actions* column so that it always appears as the first column and moving the *Modify* column to always appear second. All other columns are still organized as defined in the List View Columns menu.

- Column locking is available for all columns. You can set the lock to a new column by clicking another column locking icon — No need to disable the current locked column first.

- Pagination within list views has also been improved. Use the navigation arrows to move to the first, last, next, or previous page. You can now also type the page number you want to go to in the page number field and press Enter to go straight to a specific page.
You can resize columns in the new user experience just as with UI3. Column width is saved when a column is resized. Resized UI3 columns are not supported.

Numerical values within columns are still summed as with UI3. Currency totals and number of rows will be delivered in next release or sooner.

We have significantly improved the toolbar used in List views. First, the toolbar has been reduced from multiple rows to only one. It contains Screen navigation, Bulk actions, Sorting options, the Customize list view dropdown menu, Filters, the Download list data function, and the List options menu.

The Submitted screen navigation no longer contains the Waiting for my approval option, which has been moved to a new To Approve tab containing items which need your approval.

The new Bulk actions button in the toolbar is available when any list view rows are selected. The number of rows affected is shown next to the button. Bulk action window can be opened pressing the B key.

In the Order by window, you can drag selected fields to change whether they are the primary, secondary, or tertiary sort field. Click the Sort Ascending or Sort Descending icon next to a field to select the sort type. Click Apply to save the changes.

You can also sort by columns in the list directly by pointing to the column title and clicking the Sort Ascending or Sort Descending icon. The first sort icon you click will make that column the primary sort field, the second is the secondary field, and the third is the tertiary field. Once you have three sort fields, you are unable to select another sort column until you’ve removed another field from the sort order. Click a sort icon to deselect the field as the sort field.

The Reset to default icon removes all custom sorting and returns the list to the default sorting. The Sort ascending and Sort descending icons are color-coded: The primary sort field is green, the secondary sort field is yellow, and the tertiary sort field is orange.

Click the Filter icon or press the F key on your keyboard to open the Filters menu. Here you can filter the list by various columns as in UI3. The Inline advanced filter setting comes standard with the new user experience and can’t be disabled. Column filters: List views do not currently support “value filtering”, where you can filter by specific values within a column.

Press the key L to open Saved List Layouts.

The List options Cog menu icon has been replaced with an Ellipses icon. Click the icon to select how many rows to display on a page.

Click the icon to download your list view data. As with UI3, you can download data as a CSV, HTML, or PDF file.

Note: OpenAir’s next generation user experience is being released in phases. Phase 1 must be enabled to use Phase 2.

Warning: Please test this feature extensively on a sandbox account or during release preview before enabling it in your production account.

To enable this feature, please contact OpenAir Support!

New List Options

Changes have been made to the list options for the redesigned list views:

- The maximum number of rows per page has been set to 1000 instead of All rows. This improves performance when displaying large data sets.
- Column totals are available for money columns.
To enable column totals

1. Go to the list view for which you want to display the column totals.
2. Click the more options icon and click the Column totals toggle to turn the feature on.

When Column totals are enabled, the totals for the current page are displayed in bold at the bottom of the numeric columns and the totals for the data set are displayed underneath the page totals.

The total number of rows in the page and in the data set are displayed at the bottom of the first non-numeric column.

**Note:** Money column totals are available only if Multi-currency is disabled on your account.

Column Filters

Column filters are available for the redesigned list views released in Phase 2 and Phase 3. The column filters have the same options as in the previous user experience:

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

As in the previous user experience, users can apply multiple column filters to the list view, and any column filters applied in a list view continue to apply the next time the user navigates to the same list view. When a column filter is applied, the collapsed column filter dropdown is highlighted and shows the selected filter option.

**Note:** Any column filters applied by users in the previous list view design will continue to apply in the redesigned list views and vice-versa. Any column filters applied by users will be preserved when enabling or disabling the redesigned user experience Phase 2 and over.

New column filter features in the redesigned user experience:
- Tooltip – when hovering the mouse over a column filter dropdown, a tooltip shows “Column filter”.
- Search – A search box at the top of the column filter dropdowns enables quicker selection from long lists of options.
- Clear column filters – To clear all column filters applied to the list view, click the more options icon and click Clear column filters.

Inline Edit in the Project Tasks List View

A new inline editing feature enables you to edit project tasks from within the project tasks list view. Double-Click on any editable field value to edit it straight from the list view, without having to open the project task form. Click on a different row to save the changes made, or use Enter and Tab to move around the list view. The task form permissions and form rules are applied as well as any form scripts associated with the project task.
Note: To enable this feature, please contact OpenAir Support and request the following feature in addition to OpenAir Redesigned User Experience Phase 2: Enable inline editing in list views.

Warning: Please test this feature extensively on a sandbox account or during release preview before enabling it in your production account.

Redesigned OpenAir User Experience Phase 3

With this feature, the following additional list views are available with the redesigned user experience:

- Projects
  - Issues
  - Project budgets
  - Alerts
- Resources
  - Resources
  - Resource Demand Requests (RDR)
  - Resource Request Queues (RRQ)
  - Alerts
- Timesheets
  - Timesheets
  - Time entries
  - Schedule Requests
  - Leave accrual > All transactions
  - Alerts
- Expenses
  - Receipts
  - Authorizations
  - Alerts
- Invoices
  - Invoices
  - Slips
  - Retainers
- Purchases
  - Purchase requests
  - Request items
  - Purchase orders
  - Purchase items
  - Fulfillment outstanding / Fulfilled POs
  - Fulfillments
Restrict Specific Custom Fields from Being Copied

OpenAir maximizes the use of user time by allowing cloning, duplicating, repeating, and/or copying in projects, expenses, resources, timesheets, and workspaces. In some companies, custom fields placed on receipts, charges, bookings, billing rules, and tasks could create problems if reproduced. Therefore, it may be desirable not to allow these custom fields to be copied. You can designate custom fields as restricted from duplication.

To enable this feature, please contact OpenAir Support!

Save List View Configurations

Save and load list view configurations and share them with your colleagues!

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 or set a default list view configurations which will be
applied to all new users.

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.

To enable this feature, please contact OpenAir Support!

Note: 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.

Select Period for Attachments Backup in
Automatic Backup System (ABS)

The Automatic Backup System now allows you to select relative or absolute time periods to back up,
rather than backing up all attachments, allowing you to reduce the file size of each backup.

Navigate to the Automatic Backup System form and use the Date range dropdown menu to select a
relative range, or enter a Start and End Date.

ABS will back up all documents and attachments created or modified during the selected period. In
addition, the form will display the file size of your selected documents before they are compressed as a
ZIP file.

Single Sign-On Integration Leveraging SAML

Companies that wish to use an external Identity provider to manage login authentication to OpenAir
can validate User IDs using the Security Assertion Markup Language (SAML) protocol. This interface
permits users to log in one time to a single site account, and then access OpenAir services without
the need to provide credentials again. SAML works well as a transport for LDAP and other popular
authentication back-ends. As such, it provides a method of secure integration with existing, on-site
authentication infrastructures without exposing these services to direct public access, and enables
federation of user identity across any number of additional services.

To enable this feature, please contact OpenAir Support!
Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata

Replace all non-alphanumeric characters with underscores in your data feed’s column titles and metadata.

When this feature is enabled, space characters in column titles are replaced with underscore characters.

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

All non-ASCII, non-alphanumeric characters are replaced also replaced with underscores. In addition, if a column name’s first character is a number, an additional underscore will be added at the beginning.

This feature is especially useful for supporting Microsoft SSIS integrations.

To enable this feature, please contact OpenAir Support!

Stop Slow Lists

Stop lists which take too long to load. With this feature enabled the system will generate a message when the set time threshold has been reached and allow the user to either stop or keep going.
Stop Slow Lists

Stop Slow Reports

Stop reports which take too long to load. With this feature enabled the system will generate a message when the set time threshold has been reached and allow the user to either stop or keep going.

To enable this feature, please contact OpenAir Support!

Suppress Email Notifications or Add Addresses to Notifications

Users can selectively choose to suppress email notifications when they make changes to bookings, issues, tasks, and projects. For example, a user may not wish for a minor modification to trigger an email. To suppress email notifications, when in the edit form of the associated entity, select a check box indicating that email notification is suppressed. An email will not be sent to the notification list. Set up a custom field in each entity for the suppress email notification option and it displays in the associated edit forms.

Additionally, users can send notifications to additional email addresses for OpenAir and non-OpenAir users. These users may include those who may not routinely be notified of task or issue changes. Enter the email addresses in the text box for “E-mail addresses to cc” on the Edit tasks and Create or Edit issues forms. This text box displays once the feature is enabled.

To enable this feature, please contact OpenAir Support!
Un-export Records from a Specific Application via UI

OpenAir enables records to be marked as un-exported via Run an action in list views. This includes records in timesheets, expense reports, invoices, and revenue recognition transactions. OpenAir has enhanced this functionality with the ability to mark records as being un-exported from a specific application (e.g. IM). In addition, users can choose to mark the parent, child, or both records as being un-exported (e.g. invoices only, charges only, or invoices and charges).

To allow specific users to un-export records, navigate to Administration > Global Settings > Users > Employees > [select an Employee]. In the respective sections (e.g. Timesheet Options), check the option The employee can mark [timesheets] exported.

To enable this feature, please contact OpenAir Support!
Use Days Instead of Hours for All Time Entries

Enable this feature to use days instead of hours for time entries.

After toggling, you must navigate to Administration > Global settings > Work schedule > [select schedule] and change the value for “Work days per day for this company work schedule” from “7.5” or “8” to “1”, for example. This should be done for every work schedule, especially those where the number of associated employees is more than zero.

User-Defined Reporting Currencies

Enable this feature to create user defined currencies for reporting in the Multi-currency tab.

After you have added the currency symbol, name and rate in the Multi-currency tab, the user defined currencies will be available for reporting but not for data entry and will have both the symbol and name displayed in the currency drop-down and report views.

When enabled, navigate to Administration > Global Settings > [Organization] Currencies > Multi-currency.

To enable this feature, please contact OpenAir Support!
Verify Password Change

With this feature, changing your password now requires you to 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.
This feature also affects changing your password when it has expired, or if you 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 your current password incorrectly when changing passwords will count towards your allowed password attempts.

To enable this feature, please contact OpenAir Support!

### View Audit Information for Custom Fields in Table Format on Forms

OpenAir’s custom field functionality permits users to create additional fields for entities that are not available as a standard built-in field. Different types of custom fields (e.g. text, checkbox, date, etc.) can be associated with various entities (e.g. project, customer, expense report, etc.). As these custom fields are available on forms, users who have the appropriate role privileges may modify these fields. With various users modifying these fields, it is beneficial to view the audit information to identify who made a change and when.

OpenAir has enhanced auditing capabilities to include the ability to view the audit information for custom fields directly on the form. The audit information is presented in table format displaying the user who made the change, the date the change was made, what the previous value was, and what the value has been changed to.

**Note:** A new role privilege has been added to allow specific roles to see the audit information. To enable this role privilege, administrators navigate to Administration > Global Settings > Users > Roles > [select a role]. Select the option View quick audit trail for custom fields. Click Save.

To enable this feature, please contact OpenAir Support!
Timesheets

The following optional Timesheets features are available in OpenAir. Some features require OpenAir Support to enable them for you.

- Automatically Create Overlapping Timesheet
- Automatically Receive PDF Attachments of Approved Timesheets and Expense upon Approval
- Calculate Remaining Hours Using Approved Hours Instead of Worked Hours
- Configure Time Entry Rounding at the User Level
- Display Payroll Type Field on Time Entries List View
- Filter Timesheet Report by Project
- Line Item Rejection in Timesheets
- Prevent Entry of Future Time at the User Level
- Proxy Confirmations
- Self-Rejection of Timesheets
- Set the Timesheet Duration At the User Level
- Time Entries Match Task Assignments
- Time Entry Grid Filtering
- Update Time Entries Based on Booking Types
- Use Zero Hours Rather than Planned Hours for Users’ “Hours Remaining” Estimates

Automatically Create Overlapping Timesheet

Auto-create overlapping timesheet for second part of the week at month end. This feature requires use of the 'Prevent the entry of time for different months on single timesheet' feature.

To enable this feature, please contact OpenAir Support!

Automatically Receive PDF Attachments of Approved Timesheets and Expense upon Approval

Employees within a company may need to download a hard copy of their approved timesheets or expense reports. For example, on occasion, hard copies of expense reports will need to be attached to
invoices that are being sent to a client. Without this feature, users can download a PDF version of the report from within the actual timesheet or expense report.

With this feature enabled, users can automatically receive a PDF attachment of the approved timesheet report or expense report. A PDF view of the report will be attached to the email notifications for approved timesheet and expense reports.

To enable this feature, please contact OpenAir Support!

**Calculate Remaining Hours Using Approved Hours Instead of Worked Hours**

Enable this setting to calculate hours remaining as estimated hours minus approved hours, instead of estimated hours minus worked hours.

To enable this feature, please contact OpenAir Support!

**Configure Time Entry Rounding at the User Level**

Time entries can be entered on a timesheet in different increments. For billing purposes, it may be necessary to round these time entries depending upon contractual agreements. For some companies, certain groups of users may need different rounding rules applied based on their location. Currently, time entry rounding rules are applied at the account level for all users. OpenAir has the ability to configure the time entry rounding option on a per-user basis.

To enable this feature, please contact OpenAir Support!

**Display Payroll Type Field on Time Entries List View**

With this feature, individual time entries can be viewed in a separate tab in the Timesheets module. The list of time entries may be used to identify the time logged by contractors and to mark these time
entries as paid with an associated invoice. When viewing these entries, it may be beneficial to see the associated payroll types. This feature adds the ability for users to customize the Time entries list view to display the "Payroll type" field.

To display the "Payroll type" in the Time entries list view, users with the appropriate role privileges navigate to a list and click on the Customize list view link. Add Payroll type. Click OK.

To enable this feature, please contact OpenAir Support!

Filter Timesheet Report by Project

Project approvers who have the ability to view multiple projects on one timesheet report can use the "Project filter" to view hours for a specific project. The timesheet report refreshes and displays only the hours for the project selected. This provides a quick way to ascertain the number of hours on a timesheet applied against a specific project.

To enable this feature, please contact OpenAir Support!
Line Item Rejection in Timesheets

Use line item rejection in timesheets to streamline operations. Instead of delaying the invoice process because of an error in one time entry, reject the entry in question and continue to process the timesheet and invoice the already approved entries. This permits users and managers to save time for approvers while viewing individual entries.

To enable this feature, please contact OpenAir Support!
Note: If timesheet rules are configured, administrators can choose to have the rule ignored upon the resubmission of rejected time entries. To enable this option, navigate to Administration > Application Settings > Timesheets Settings > Timesheet rules. Check the option Ignore rules on submission of timesheets with individually rejected time entries and save. Users will not see warnings or errors for timesheet rules if submitting a timesheet that contains rejected time entries.

Prevent Entry of Future Time at the User Level

OpenAir’s timesheet functionality permits users to log time that has been worked on different projects. However, for compliance purposes, managers may wish to have their employees only enter time for the current week’s timesheet and restrict the ability to enter time entries for future dates. Previously, OpenAir had released functionality that would prevent users from entering future time entries. With this feature enabled at the account level, all users were restricted from being able to enter time for future dates. For certain companies, policies may allow a certain group of users to enter time for future dates, but not others. OpenAir has further enhanced this functionality to include the ability to set this configuration on a per-user basis.

To enable this feature, please contact OpenAir Support!
Proxy Confirmations

Many companies allow users to leverage OpenAir's proxy capabilities to log in on behalf of another user to either submit or approve a timesheet. Allowing users to proxy in as other users may prevent delays in the billing process. For compliance purposes it may be required that the original submitter or approver of a timesheet confirm acknowledgement that the proxy action has taken place.

For example, if Mary Adams was on vacation and Bill Carr submitted her timesheet on her behalf, Mary Adams would need to confirm the timesheet to acknowledge that Bill submitted it on her behalf. This feature enhances the proxy capabilities to allow users to view which timesheets need to be confirmed by them due to proxy submission or approval.

When enabled, existing role settings will need to be modified to allow for timesheet confirmations. All newly created roles will have the option enabled automatically. To modify a role, navigate to Administration > Global Settings > Users > Roles > [select a role]. Select the option View confirmed timesheets.

- A new dashboard link, X Timesheets awaiting your confirmation, under the Reminders section will indicate to the user that there are timesheets waiting for their confirmation. When clicked, users will be brought to the Confirmed tab in the Timesheets list view.
- A new tab for "Confirmed" is now available under the Timesheets tab. If there are timesheets waiting for confirmation because of a proxy submission or approval, those timesheets will be listed under the sub-links "Submitted waiting my confirmation" or "Approved waiting my confirmation". The "All" sub-link will list any timesheet that needs to be confirmed by a user. Timesheets that are bolded indicate timesheets that specifically need attention from that user.
- As part of the timesheet "Approval history", timesheets will have an additional status of [Confirmed], [Confirmation reject], or [Confirmation pending] to indicate that some confirmation action is needed or has been made.
- For auditing purposes, the Timesheets detail report now contains the report values "Submission confirmed by" and "Approval confirmed by" to indicate who actually confirmed the timesheet. Additionally, two additional filters for "Submission confirmation status" and "Approval confirmation status" have been added to filter results based on the confirmation status of timesheets. For example, managers can run the report and filter on "Confirmation Pending" to view all timesheets that have not yet been confirmed by anyone. To access the Timesheets detail report, navigate to Reports > Detail > Timesheets.

To enable this feature, please contact OpenAir Support!
Self-Rejection of Timesheets

When an employee submits a timesheet prematurely and wishes to make changes, the process required the entire timesheet to be rejected by an approver - whereupon changes can be made. With this feature, users can reject their own timesheet, thus eliminating the need for approvers to reject unnecessary incorrect timesheets.

Users will have the ability to reject their own timesheets if no approvals have occurred. When rejected, the timesheet will be moved to the "Rejected" status where the user can modify specific time entries and resubmit for approval. The approval history for that rejected timesheet will indicate that the owner has rejected the timesheet, and include any explanation.

**Note:** If line item rejections are enabled and specific line items on a timesheet have not been approved, each line item can be rejected by the timesheet owner.

**Note:** Approved timesheets cannot be rejected. Users can only reject their own timesheets if they haven’t been approved or rejected already by an approver.

To enable this feature, please contact OpenAir Support!

Set the Timesheet Duration At the User Level

This feature permits your users to set their own timesheet duration, overriding the default duration.

To enable this feature, please contact OpenAir Support!
Time Entries Match Task Assignments

When this feature is enabled, if a user submits their timesheet they will receive an error if the time entry date is not within the task's start and end date (inclusive) range.

This is a system-wide setting that can be overridden on a per-task basis by the selection of a checkbox custom field.

To enable this feature, please contact OpenAir Support!

Time Entry Grid Filtering

Use a hierarchy filter to limit the number of Customer:Project entries that display on a timesheet grid. Different types of hierarchies can be created for geographic locations or business units, or even for types of work or other characteristics that make sense for your company. When all users can view all projects, this feature helps reduce the size of these lists, making them more manageable. Select the setting for using the hierarchy as the primary project drop-down filter and assign projects to a hierarchy node. When a user specifies a node on the timesheet grid, the projects within that hierarchy are easy to locate.

To enable this feature, please contact OpenAir Support!

Update Time Entries Based on Booking Types

Use this feature to define exactly how time entries are created or updated for selected booking types.
To use this feature, first go to Administration > Application Settings > Timesheets Settings > Other Settings and select the “When creating a timesheet, automatically create time entries for bookings” option.

Go to Administration > Application Settings > Timesheets Settings > Timesheet Rules to set how time entries based on bookings are created.

To enable this feature, please contact OpenAir Support!

Use Zero Hours Rather than Planned Hours for Users’ “Hours Remaining” Estimates

This setting uses “0” for “Hours Remaining” estimates rather than using planned hours. This setting only affects project outline and list views.

To enable this feature, please contact OpenAir Support!
Expenses

The following optional Expenses features are available in OpenAir. Some features require OpenAir Support to enable them for you.

- Adjust an Approved Expense Report
- Automating Tax Location
- Foreign Currency Receipts in Expense Grid
- View All Receipts on One List

Adjust an Approved Expense Report

This feature permits a user with the Adjust approved envelopes role to create 'offsetting receipts' in an 'adjusting envelope' by running the Adjust selected receipts bulk action. This can be used, for example, to zero out one or more receipts in an approved envelope.

Configuring this feature requires the following settings:

- Approval of envelope adjustments
  - Always require approval for adjusted envelopes
  - Do not require approval for adjusted envelopes
  - Require approval for adjusted envelopes only if net reimbursement amount is not zero
- Accounting date of adjusted envelopes
  - Adjusted envelopes have accounting date set by accounting date rules
  - Adjusted envelopes have accounting date of original envelope
- Accounting date of receipts in adjusted envelopes
- Adjusted envelope receipts have accounting date of original receipt
- Adjusted envelope receipts have accounting date set by accounting date rules

Note: Envelopes with net negative totals cannot be exported to systems that do not expect negative transactions, such as NetSuite or QuickBooks. This may affect your usage of the expense report adjustment feature.

To enable this feature, please contact OpenAir Support!

Automating Tax Location

When using input tax on expenses, one expense item could be taxed using several different tax locations depending on where the expense was incurred. For example, an expense item of "Meals" may be taxed at 10% in Germany, 15% in France and 20% in the UK. Expecting an employee to select the correct tax location for every expense item is unreasonable. Furthermore, the list of tax locations from which to pick in enterprise international accounts can become very long and with no filtering or defaulting by employee extremely cumbersome to use.

To ease expense entry and minimize user error, OpenAir can default a tax location for a receipt based on:

- The expense item
- The geographical location in which the expense was incurred (defaults to the user's home location)
With this feature enabled, a user can (1) mark where a specified expense was incurred and (2) OpenAir can then automatically calculate the correct taxes based on the home location of user. The user can override this calculation if necessary.

**Note:** The calculation fields are highlighted if the user overrides the calculation. The user can reset back to the calculated values by clicking the **RESET TO DEFAULT** button.

To setup this feature your administrator needs to:

- **Administration > Application Settings > Tax Locations** - Create the required tax settings.
  
  **Note:** It is recommended to use this for tax settings and not for tax locations.

- **Administration > Application Settings > User Locations** - Create the required user locations.

- **Administration > Application Settings > Expenses Settings > Expense item** - Fill out the new grid to match User location to Tax location combinations for the expense item.

![Image](image.png)

To enable this feature, please contact OpenAir Support!

### Foreign Currency Receipts in Expense Grid

When creating an expense report that contains foreign currency receipts, by enabling this feature users can now enter and view information for all foreign currency receipts in the Expense Grid. The Expense Grid displays different currencies and associated exchange rates for the receipts. When the grid is saved, amounts are converted to the expense report default currency for reimbursement and will appear in the default currency on the expense report. If company settings allow, exchange rate amounts can also be modified in the Expense Grid.
Note: If company settings mandate that the receipt currency match the envelope or user’s default currency, the Exchange rate for foreign currency receipts is displayed as read-only. The ability to modify exchange rate information is also based on the company Foreign currency receipt type selection. To select the Foreign currency receipt type, users with required role privileges navigate to Account > Company > Settings > Expenses Options and select either “Modifiable exchange rate based on the current date,” “Non-modifiable exchange rate based on the receipt date,” or “Non-modifiable exchange rate based on the receipt date. Ignore rate overrides.”

To enable this feature, please contact OpenAir Support!

View All Receipts on One List

View expense receipts sorted and filtered as required.

To enable this feature, please contact OpenAir Support!
Projects

The following optional Projects features are available in OpenAir. Some features require OpenAir Support to enable them for you.

- Additional Functionality for Expense Policies on Per-Project Basis
- Adjust Planned/Assigned Hours Based on Actual Work
- Allow Users to Un-approve Budgets
- Apply Phase Filtering in Time Billing Rules
- Automated Search Engine for Booking Creation
- Automatically Add New Users to Assignment Groups
- Control Editing Submitted Entities by Approvers via Role Permissions
- Client Contact Information in Project Properties
- Close a Task for a Specific User for Timesheets and Expenses
- Color-Coding on Actual versus Planned View
- Compare Budgets
- Create Portfolio and Sub Projects and Share Billing Rule Caps across Multiple Projects
- Default Options on Task Assignment
- Define Charges to Recognize in “As Billed” Revenue Recognition Rules
- Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets
- Exclude Project from Charge Projections
- Hide the Daily, Weekly, or Monthly Resource Planner Options
- Hide the Project Progress Bar
- Inline Editing, Drag-and-Drop Functionality, and Enhanced Gantt Layout
- New “Booking Type” Filter in Revenue Recognition Rule
- One Project Per Expense Report
- Optionally View and Assign Revenue Hours for Recognition Transactions
- Pagination for the Task Worksheet
- Phase/Task Filter in “Incurred vs. Forecast Rule”
- Prevent Deletion of Users Assigned to Tasks with Logged Hours
- Prevent Invoicing and Revenue Recognition on a Per-Project Basis
- Project Assignment Profiles
- Project Budgets
- Project Status News Feed
- Project Status Summaries (PSS)
- Resource Icons on the Outline and Gantt View
- Select Different Currencies for Loaded Cost Overrides
- Set Preferred Landing Page for Projects
- Show Billing Rules on Revenue Recognition Forms
Streamlined Budget Approvals
User-Level Outline View
View Tasks for Inactive Projects in Task List View

Additional Functionality for Expense Policies on Per-Project Basis

OpenAir has the ability to limit expense items on a per-project basis. Configuring expense policies on a per-project basis permits companies to dictate different policies based on the work being done. Work performed in different countries may have different policies for projects. Expense policy functionality has been further extended to include additional expense policy options at the project level.

With this feature, you can define what expense items can be selected on an expense report based on the project selection. This feature also adds a new expense policy description field where you can describe a particular project's expense policy.

To enable this feature, please contact OpenAir Support!

Adjust Planned/Assigned Hours Based on Actual Work

OpenAir's project management capabilities allow project managers to assign hours for specific individuals assigned to the task. Often, managers will compare the number of hours that have been assigned against the number of hours worked thus far. As work is being done on the task, it is beneficial for managers to run accurate forecasting reports based on actuals.

For forecasting, it is ideal to have past planned/assigned hours updated to equal the approved hours. Without this feature, updating the planned/assigned hours accordingly is a manual process. With this feature enabled, OpenAir can streamline the process for updating planned/assigned hours based on actual worked hours on a per-task and per-user basis. Planned/assigned hours in the past are adjusted to equal approved hours and future planned/assigned hours can be re-cast in three different ways.
Adjust Planned/Assigned Hours Based on Actual Work

There are three ways to re-cast future task assignment hours:

1. Adjust end date of the task or tasks, keeping current users' allocation
   - Percent of user's time will not be changed
   - End date will be moved so that future planned hours equals remaining unworked hours

2. Keep end date of tasks, adjusting users' allocation
   - End date will be preserved
   - User allocation will be adjusted so that future planned hours equals remaining unworked hours

3. Task is finished. Remove remaining planned hours

To enable this feature, please contact OpenAir Support!

Allow Users to Un-approve Budgets

Give selected users the power to un-approve budgets. To enable this feature for a user, go to Administration > Global Settings > Users > Employees > [Select a user ID], scroll to Projects Options, select the "Allow the employee to un-approve a project budget" option, and click Save.

To un-approve a budget, go to Projects > Projects > [Select a project] > Project budgets > [Select an approved project budget] > click the edit icon, and click Submit/Approve. In the Approval History screen, click the "Click here" link in the un-approve message to un-approve the budget.

Apply Phase Filtering in Time Billing Rules

OpenAir's flexible project management capabilities allow you to create extensive project plans that include phases, sub-phases, and tasks. For companies that have large project plans and leverage the
existing task filter on time billing rules, it may be beneficial to have all newly created tasks picked by billing without the need to manually add the new task to the billing rule filter. For example, there may be a phase in the project plan called "Billable" and any task within that phase should be picked up for billing and all other tasks outside of that phase should not.

Without this feature, these tasks would need to be added to the Task filter within the time billing rule. In addition, any new task that is created under that phase would need to be manually added to the filter. OpenAir has enhanced time billing rule capabilities to include the ability to filter on phases. If a phase is selected in the filter, all tasks that are a part of that phase will be processed by billing. In addition, if a parent phase is selected, all tasks within that parent phase as well as any sub-phases will be picked up by billing.

To enable this feature, please contact OpenAir Support!

Automated Search Engine for Booking Creation

Provides the means for project managers to assign required skill sets to task or project assignments.

- Auto-create bookings for the best matched resources based on search results
- Kick off the booking approval process
- Auto-substitute generic resources for real resources based on approved booking

This feature must be used in conjunction with the resource booking approvals feature and will use the project assignment profile if it is enabled.

Example of use:

1. Project manager creates a project plan with tasks
2. Project manager assigns generic resources and can select an assignment profile if the "Project assignment profile" feature is enabled
3. Project manager starts the generic resource booking search which returns the best matched resources
Automated Search Engine for Booking Creation

4. Project manager sees a preview of the search results and selects which ones to create bookings for
5. Project manager selects the option to create the bookings and submit them for approval
6. Booking approvals are kicked off if the "Resource booking approvals" feature is enabled
7. When the booking has been approved, the generic resource is substituted with the real resource

To enable this feature, please contact OpenAir Support!

Automatically Add New Users to Assignment Groups

Companies that leverage assignment groups are able to assign a group of users to certain projects and tasks for time and expense entry. This is beneficial for assigning all employees in the company to internal projects such as time off or administrative projects. Currently, any new user that is created will have to be manually added to any applicable assignment groups.

OpenAir can use a more streamlined process for assigning newly created users to specified assignment groups. Specific assignment groups can be designated to automatically include any new user that has been created in the system. If a particular assignment group has been flagged, any new user that is created will automatically be added to that assignment group.

This behavior only applies to newly created users and not existing users that have been updated.

To enable this feature, please contact OpenAir Support!
Control Editing Submitted Entities by Approvers via Role Permissions

With this feature, you can more easily control and administer approver rights to edit a submitted item via role permissions instead of account level setting.

Client Contact Information in Project Properties

Identify key client contacts at the project level. Select, edit, or add contacts in the project form. When you select an existing contact, contact information (Name, email, phone number, etc.) is automatically populated for you. The contact information can also be shown in the Projects (Account-wide) report.

To enable this feature, please contact OpenAir Support!
Close a Task for a Specific User for Timesheets and Expenses

When this feature is enabled two new checkboxes are available for assignments in the project form. This permits a project manager to close the task for a user for timesheets and expenses. This is particularly useful in cases where a user’s work has been done and they are not allowed to report any additional time or expenses against the task.

To enable this feature, please contact OpenAir Support!

Color-Coding on Actual versus Planned View

Understanding the financial status of your project has never been easier! Define color-code ranges based on percentage of planned versus actual values, and instantly identify which budget items are on target and which require action to be taken. See approved, submitted, and open expenses, purchase requests, and time entries together.

To enable this feature, please contact OpenAir Support!
Compare Budgets

Get more control over your budget approvals by comparing up to five submitted budgets at the same time. Intuitively compare all submitted budgets side-by-side and approve the most realistic scenario. View totals as well as monthly, quarterly, category-level, and task-level details.

To enable this feature, please contact OpenAir Support!
Create Portfolio and Sub Projects and Share Billing Rule Caps across Multiple Projects

At times, companies may receive one contract from a client that may need to be divided between multiple projects. As work is being done on these projects, billing may need to draw down from that one contract amount to ensure that the agreed upon amount has not been exceeded.

OpenAir has the ability for users to leverage customer POs and portfolio projects to apply one billing cap across multiple projects. Upon creation, a project can be designated as being a portfolio project. A portfolio project can contain multiple sub projects. When billing is run on portfolio projects, the billing rules will automatically apply to all sub projects. For example, if a billing rule was configured at the portfolio level and a cap has been established, that cap will apply to all projects within that portfolio project.

Applicable rules include Time, Expense item, and Purchase item billing rules. This behavior will also apply to As billed, Expenses, Purchases, and Time project billing revenue recognition rules. In addition, the customer PO functionality includes an Hours field. When creating a new customer PO, the existing Amount field and new Hours field are mutually exclusive. With the enhanced customer PO functionality, companies that leverage customer POs to track contract amounts can use the customer PO total (hours or money) as the cap on billing rules for portfolio projects. If portfolio projects are being used and the customer PO is being used as the cap, that cap will be applied across any subset of projects within that portfolio.

To enable this feature, please contact OpenAir Support!

Default Options on Task Assignment

Establish default values for task assignment custom fields for new tasks. Easily update any of the default values for some or all project tasks using the task assignment change wizard. This feature saves an enormous amount of time and effort. When default values associated with a user or group are entered, they automatically populate on each task to which the user or group is assigned. In addition, as changes become necessary, they can be made to multiple tasks at one time.

To use this feature, navigate to Projects > Create new form. Enter the form information and Save it. Then, in the Projects list view, select a project. Select “Task assignment” from the Phases/Task dropdown. Next, enter the default information for each resource or group who will be assigned to a task in the new project, and click Save. Finally, create phases and tasks for the project. The default task assignment custom fields are displayed, and when resources are assigned, the default resource information automatically populate the custom fields.

To enable this feature, please contact OpenAir Support!
Define Charges to Recognize in “As Billed” Revenue Recognition Rules

OpenAir’s flexible revenue recognition engine permits companies to recognize revenue based on various criteria. Specifically, the “As billed” revenue recognition rule permits companies to recognize all revenue generated from charges. This feature adds functionality to allow users to configure each individual as-billed rule to recognize revenue based on the invoiced status of charges as well.

To enable this feature, please contact OpenAir Support!

Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets

See what impact your planning has on the final project price!

This feature adds Estimate at Completion (EAC) and Estimate to Complete (ETC) columns to your budgets’ total columns in the budget, actuals, and compare screens. When you save changes to your budget, the EAC and ETC fields update to account for the changes.

- **Estimate to Complete** – includes all planned budget values from a set pivot date until the last project budget entry
Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets

- **Estimate at Completion** – includes all actual budget values before a set pivot date and Estimate to Complete values from the set pivot date until the last budget entry.

ETC and EAC values can also be used in several types of crosstabbed and detail reports. In addition, you can use the **Inception to Date (ITD)** field in reports:

- **Inception to Date** – describes how much money has been spent from the beginning of the project up to a certain point of time (either today or a set pivot date).

This feature also allows you to set a baseline budget which is used as the main point of comparison against a project's actual data and other budgets for that project in reporting. A budget with any type of status (open, approved, submitted, archived) can be marked as a baseline.

**Note:** Each project can only have one baseline budget.

To enable this feature, please contact OpenAir Support! This feature also requires the **Project Budgets** feature.

### Exclude Project from Charge Projections

Exclude selected projects from charge projections. This feature enables a new checkbox custom field on projects called `exclude_from_projections`, which, when set to 1, causes the charge and recognition projections job to be skipped for the project(s) on which the field is set.

Use the project detail report to see the list of excluded projects.

To enable this feature, please contact OpenAir Support!

### Hide the Project Progress Bar

The % complete progress bar can now be hidden in projects for the whole account. This is useful for customers that don't use the % complete metric and calculate project progress in another way.

To enable this feature, please contact OpenAir Support!
Hide the Daily, Weekly, or Monthly Resource Planner Options

Use this option to hide the Daily, Weekly, and Monthly options in the Resource Planner.

To enable this feature, go to Administration > Application Settings > Resources settings > Other settings and select any or all of the following options:

- Disable daily option in resource planner.
- Disable weekly option in resource planner.
- Disable monthly option in resource planner.

Inline Editing, Drag-and-Drop Functionality, and Enhanced Gantt Layout

Reorder tasks by dragging them to new positions or create dependencies from one task to another. Use inline editing to change the task name or predecessor.

For Project Outline view:

- In-line editing of task name, ID, predecessor or start and end dates
- Reorder of task, phase, milestone by dragging to new positions
- Modify order of columns by dragging to new positions

For Gantt view:
Set dependency by dragging from one task to another
Drag task to different date or chance start or end date
Outline view and Gantt as one view

To enable this feature, please contact OpenAir Support!

New “Booking Type” Filter in Revenue Recognition Rule

OpenAir’s flexible revenue recognition rules allow companies to recognize revenue on a per-project based on different rules and criteria. The Incurred vs. forecast rule permits revenue to be recognized based on how the project is progressing against the project plan. Revenue is recognized by dividing the incurred costs by the forecasted costs, multiplied by the revenue that is to be recognized. The incurred and forecast costs can include a combination of labor, expenses, bookings, or purchases.

OpenAir has the ability to include a booking type filter leveraging bookings in the forecasted cost calculation. This may be beneficial if the forecast option is configured to use “Approved and booked hours multiplied by user cost” option and would like to exclude bookings that have a booking type of “Tentative” from the calculation.

To enable this feature, please contact OpenAir Support!

One Project Per Expense Report

At times, companies may only want users to enter one project on an expense report for invoicing purposes. In addition to the expense policies options, users now have the ability to restrict an expense report to one project. With this feature enabled, when users create an expense report, the client:project selection is done at the expense report level. All subsequent receipts created will be associated with that client:project.

When the project has been selected, the client:project dropdown will be read-only on the receipt form and locked on the expense worksheet.
**Note:** If the selection for the client:project is modified at the expense report level after receipts have been entered, all receipts will be changed to the new client:project. Since a new client:project is now associated with the receipts, the expense items and task selection will be cleared from the receipts.

To enable this feature, please contact OpenAir Support!

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**Optionally View and Assign Revenue Hours for Recognition Transactions**

Typically, an "As billed" or "Time project billing" recognition rule is created to generate the total revenue amount based on hourly charges. In addition to seeing the total recognized revenue, it is beneficial to view the total recognized hours specifically for transactions generated from hourly charges. This feature adds two enhancements to the revenue recognition functionality which allow users to view and modify revenue hours for recognition transactions.

The ability to display the revenue hours for each recognition transaction has been enabled for all accounts. To disable the display of revenue hours, users with the appropriate role privileges navigate to Projects > Projects > [select a project] > Financials > Recognition. Select the "As billed" or "Time project billing" rule and uncheck the option **Populate hours in recognition transactions**. This functionality can be disabled on a per rule basis. At times it may be necessary to create a manual transaction with varying revenue hours or edit an existing system generated transaction. For companies that allow users to manually create revenue recognition transactions, time (in hours and minutes) can be entered for each transaction.
Optional View and Assign Revenue Hours for Recognition Transactions

Note: Form permissions have been added to the revenue recognition transaction form. Time for existing recognition transactions can also be modified.

To enable this feature, please contact OpenAir Support!

Pagination for the Task Worksheet

Break the task worksheet into separate 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 Settings > Worksheet Display.
2. In the “Number of paginated rows to display” field, enter the number of tasks you want to show on each page. Clear the field to disable this feature.
3. Select “Enable sorting on columns ID and Task name” to allow users to sort these columns alphanumerically in ascending or descending order.
4. Click Save.

**Note:** This feature also requires the Task Grid feature. Please contact OpenAir Support and request the Enable the Task Grid Feature account setting.

Phase/Task Filter in “Incurred vs. Forecast Rule”

With this feature enabled, the Projects > [select Project] > Financials > [create Incurred vs. forecast rule] form shows Phase/Task instead of Task in the Recognition rule filters section.

To enable this feature, please contact OpenAir Support!
Prevent Deletion of Users Assigned to Tasks with Logged Hours

When this feature 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.

To enable this feature, go to Administration > Application Settings > Projects Settings > Other settings and select the “Enable prevent deletion of user assignment with logged hours” option.

Prevent Invoicing and Revenue Recognition on a Per-Project Basis

Often times, companies may create projects and have users begin work on a project before there is a signed contract. In addition to having users log time and expenses to the project, accurate billing and revenue forecasting is necessary for these types of projects. However, since these projects are considered to be at risk projects, invoicing, revenue recognition transaction, and revenue container creation should be prohibited for these projects.

OpenAir has the ability to designate specific projects that should prevent invoicing and revenue recognition creation. If a project has the option enabled on the project properties form, users will not be able to create invoices, revenue recognition transactions or revenue containers for that project until that option has been disabled. However, billing rules, revenue recognition rules, charge and revenue projections, project billing transactions, and charges can be created for the project.

To enable this feature, please contact OpenAir Support!
Project Assignment Profiles

Project Assignment Profiles provide the means for project managers to assign required skill sets to task or project assignments. These skill sets can be used to find appropriate resources and book them to projects or tasks.

To create a Project Assignment Profile, a product manager would create a project and its associated tasks. Within the project they can go to the Assignment profile tab and create a new assignment profile, which acts as a container for various skills. Within the profile, the product manager can create various skills which the profile requires. Once completed, the skill profile can be used within any of the project's associated tasks to quickly replace a generic resource with a qualified resource.

To enable this feature, please contact OpenAir Support!
Project Budgets

Stay on top of your project financials with the new project budget feature which lets you set a budget at the task or project level for labor, expenses, and purchases. When the project is live you can track the real spending either at the task or project level.

⚠️ Important: The previously existing project budget feature has been renamed to 'Transactional budget'. This can be renamed back to 'Project budget' in the account terminology.

To enable this feature, please contact OpenAir Support!

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Project Status News Feed

Add, update, and display project status messages to keep project stakeholders informed.

When this feature is enabled, a "News Feed" icon is added to the header of your projects or Project QuickViews. 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 also add pre-defined status tags for the message, such as "On Track" or "Needs Attention".
Each Status Update is tagged with a time and date stamp and the name of the person who wrote it.

Status updates can be edited after they've been published. When a Status Update is edited and published, it appears in the Project Status New Feed with an "EDITED" tag in the upper right corner. Point to this tag to see who edited the update and when it was edited.
By default, the Project Status News Feed displays 5 update messages when opened. Click the "Load More" button at the bottom of the update list to load additional messages.

Once this feature is enabled, you will also need to assign users one of the following roles:

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

To enable this feature, please contact OpenAir Support!

**Project Status Summaries (PSS)**

Produce an easy-to-read project status page summarizing important project progress data. The Project Status Summary is customizable, and can be populated with information critical to your company internally or your clients externally.

To enable this feature, please contact OpenAir Support!

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 portlets can be moved, edited, and deleted in the PSS' "Edit" mode. The description of portlets can be edited, and individual portlets can be configured to be visible or hidden to clients.

Dynamic portlets such as the Bookings portlet also allow you to set primary, secondary, and tertiary sorting criteria or filters for the individual information cards which they display.

Project Status Summaries can be printed or converted to a PDF document.

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

- View Project status page
- View and modify Project status page
Resource Icons on the Outline and Gantt View

Resource icons provide a visual indication of resource (inactive), generic (inactive), assignment group (inactive).

To enable this feature, please contact OpenAir Support!

Select Different Currencies for Loaded Cost Overrides

OpenAir’s flexible costing capabilities enables companies to accurately report on a project’s profitability based on a user’s loaded cost value. Because a user’s cost value may vary based on the project or task being worked on, loaded cost overrides can be established at the project or task level. Currently, when overriding the cost at the project or task level, the currency of the cost value is driven by the project’s currency. At times, it may be beneficial for the currency of the user’s cost value override to be different than the project's currency.

OpenAir has the ability to override the currency value for loaded cost overrides at the project and task levels. This permits more accurate profitability reporting based on the loaded cost currency on a per-project or per-task basis. The default setting for the currency value is set to “[Use Project Currency]” unless modified to a different selection. However, please note that if the project’s currency changes, it does not dynamically update the currency value to the project’s new currency.

To enable this feature, please contact OpenAir Support!

Set Preferred Landing Page for Projects

This feature sets the landing page within each project, for example, on the Task List. It can be set at a User level or for your whole company.
Set Preferred Landing Page for Projects

To set this feature for a user, go to User Center > Personal Settings > Project Options.

To set this feature for your company, go to Administration > Application Settings > Projects Settings > Other Settings > Preferred landing page for projects.

To enable this feature, please contact OpenAir Support!

Show Billing Rules on Revenue Recognition Forms

Link billing rules to revenue recognition rules.

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.

To enable this feature, please contact OpenAir Support!

Streamlined Budget Approvals

Eliminate budget approval confusion with automated versioning. Maintain one official budget, while archiving old or rejected budgets. Project managers can submit multiple budgets for approval. Approving a budget automatically rejects the others and lets the submitter know which was approved.

To enable this feature, please contact OpenAir Support!

User-Level Outline View

With this feature enabled you can see detailed values by the “Assigned To” in the new Outline and Gantt view.
View Tasks for Inactive Projects in Task List View

Managers often leverage the project task list view to manage tasks. At times, there may be a need to view information for tasks that are associated with an inactive project. Without this feature, only tasks associated with active projects are displayed in the task list view. When this feature is enabled, a new column is added to the task list to allow users to filter on tasks associated with an active or inactive project. To add the project status, users with the appropriate role privileges navigate to Projects > Tasks > Pending/Completed/All tasks and click on the Customize list view link on the upper left corner of the top menu bar. Click Project active and select Add selected items. Click OK.

To enable this feature, please contact OpenAir Support!
Resources

The following optional Resources features are available in OpenAir. Some features require OpenAir Support to enable them for you.

- Additional Booking Specific Approvers
- Add Multiple Profiles
- Advanced Booking Worksheet
- Auto-Create Bookings for Generic Resources
- Booking Assignment Date Filters
- Bulk Booking Editor
- Bulk Delete Action Respects Booking Rules
- Consolidated Resource Profiles
- Custom Booking Approvals Notifications
- Customizable Skill Level Descriptions
- Customize Resource Compare View Header
- Customized User Avatars
- Decouple RDR Header and RRQ Booking Type
- Disable New, Multiple Bookings Option
- Display More Bookings in Advanced Booking Worksheet
- Edit Resource Demand Requests After Submittal
- Enable a Booking Type to Exist in All Approval Statuses
- Enable Bookings to be Auto-Approved
- Extended Project Assignment Profile Option
- Optional Booking on Approved Booking Requests
- Profile Type Security Access
- "Require Job Code" Setting for Dynamic and Advanced Booking Worksheets
- Resource Booking Approvals
- Resource Demand Request (RDR)
- Resource Demand Request “Essential” Category for Search Base Criteria
- Resource Demand Request Queues Cannot be Finalized If Availability is Zero
- Resource Compare View
- Resource Planner
- Restricted Skills in Consolidated Resource Profile
- Show Project Assignment Profiles on Task Assignments
- Skills Approvals
- Use Booking Request Grid to Enter Multiple Requests That Are Available

Additional Booking Specific Approvers

This feature lets you specify up to three specific approvers for a booking and to bring extra flexibility to the booking approval process.
If you have RDR enabled this feature will also enable up to three specific approvers on a resource request.

You can also then use the meta-entity value (e.g. [Booking approver 1]) in approval processes.

To enable this feature, please contact OpenAir Support!

**Add Multiple Profiles**

With this feature you can quickly add multiple profiles to a resource profile at once. Simply type in part of a profile name and a list of matching profiles displays, then select one or more profiles to add to the profile.
To enable this feature, please contact OpenAir Support!

Advanced Booking Worksheet

Use a more streamlined, detailed, and visually-appealing worksheet to create and manage your bookings!

A new and improved version of the Resource Booking Worksheet is now available to help you create and manage bookings more efficiently than ever. The new Worksheet has the following features:
Advanced Booking Worksheet

- Bookings appear under each resource.
- 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.

The Advanced Booking Worksheet requires the Resource Planner feature, and also requires the following role permissions for roles which will use the worksheet:

- View and modify bookings
- View resource planner

To enable this feature, please contact OpenAir Support!

Auto-Create Bookings for Generic Resources

This feature lets you create a baseline of bookings for generic resources before resources have been committed to it. This feature will create bookings for each and every generic assigned to a project, via a button on the outline view. The feature can only be enabled if ‘Enable approvals for bookings’ is enabled.

Switch is ‘Enable creation of bookings for generics from project plan.’ Role permission is ‘Create bookings for generics from project plan’. A user does not need to have the ability to otherwise view/modify/create bookings, or even have access to the Resources module to use this, so long as they have the role permission.

**Note:** You must have booking approvals enabled to use this feature.

To enable this feature, please contact OpenAir Support!

Booking Assignment Date Filters

When this feature is enabled, a new section is added to custom calculation filter forms which allows you to use booking assignment dates as filter criteria.
To enable this feature, please contact OpenAir Support!

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**Bulk Booking Editor**

When this feature is enabled multiple bookings can be selected and bulk changes applied across any bookings that have not been rejected. The feature also enables bookings to be cloned with a link maintained to the original booking for reporting purposes.

The feature is accessed from the Run an Action > View the selected bookings in the bulk editor option.

To enable this feature, please contact OpenAir Support!

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**Bulk Delete Action Respects Booking Rules**

This feature prevents a bulk action from bypassing a permission rule set to prevent a booking from being deleted based on certain criteria.

To enable this feature, please contact OpenAir Support!
Consolidated Resource Profiles

Get clear and complete details on each of your resources!

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.

Below the header is a table of the resource's skills and experience. Click each skill to see descriptions of each skill level.

To enable this feature, please contact OpenAir Support!
Note: 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.

Custom Booking Approvals Notifications

Additional notifications are available for booking approved, submitted, rejected, and approval requested. A [Booked employee's manager] meta value is available in the Notify section of the Notifications form.

To enable this feature, please contact OpenAir Support!
Customizable Skill Level Descriptions

Add descriptions to skill levels to help your resource managers assign the right level to each resource. These descriptions appear in skill description pop-up windows when you point to a skill in Consolidated Resource Profiles.

To add descriptions for a skill level:

1. Go to Administration > Application Settings > Resources Settings and select a category which contains skills and skill levels, such as "Education" or "Language".
2. Select a skill in the list view.
3. In the "Attribute descriptions" section of the skill's form, enter descriptions for each skill level.
4. Click Save.

Point to a skill in the Consolidated Resource Profile to open a descriptive pop-up window for that skill, including descriptions of all levels of competency.

Customize Resource Compare View Header

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.
To select which fields appear in the Resource Compare View headers

1. Go to Administration > Application Settings > Resources Settings > Resource compare view options.
2. Select the fields to display in the "Header settings" section of the Resource Compare View Options form.

Note: If you try to set more than 3 fields in the header, you will receive an error message.

Customized User Avatars

Give your OpenAir resource profiles personality with custom user avatars!

When this feature is enabled, users can now upload their own avatars to replace the generic OpenAir resource avatar in their Resource Profile. The avatars also appear in Consolidated Resource Profile.

The picture used can be resized and repositioned to get your avatar just right.
If using UI4, the customized user avatar appears in the User Center.

Lastly, custom avatars appear in Resource Compare View.

This feature currently supports BMP, GIF, PNG, and JPG images, and the image file size cannot be larger than 1 MB. Uploaded avatar images do not count against your account storage.

**Note:** To enable this feature, please contact OpenAir Support and request the Customized User Avatars feature. If this feature has been enabled and later disabled, all uploaded avatar images are deleted. This feature also creates two role permissions which 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.

**Decouple RDR Header and RRQ Booking Type**

Without this feature enabled, the RDR header booking type and its RRQs are connected. Whenever either of these are changed it changes all booking types in the queue for that header and vice versa. This feature breaks the connection allowing RDR booking types and RRQ booking types to be changed independently.

To enable this feature, please contact OpenAir Support!

**Disable New, Multiple Bookings Option**

This feature removes the Bookings "New, multiple..." option from the Create Button menu.

To enable this feature, please contact OpenAir Support!
Display More Bookings in Advanced Booking Worksheet

Load up to 2,000 bookings at a time!

By default, the Advanced Booking Worksheet loads up to 500 bookings when opened. With this feature, the number of bookings which are loaded can be changed to 1,000 bookings, 1,500 bookings, or 2,000 bookings.

**Note:** Increasing the number of bookings which are displayed in the Advanced Booking Worksheet may impact performance.

To load more bookings in the Advanced Booking Worksheet when opened, please contact OpenAir Support and ask them to set the desired number of bookings to display in the Advanced Booking Worksheet.

Edit Resource Demand Requests After Submittal

Use a role permission to change booking types on finalized Resource Demand Requests.

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 they've been submitted to a resource manager.
Enable a Booking Type to Exist in All Approval Statuses

This feature eliminates the association of a booking type to the approval stages for bookings. When moving from one approval status to the next, the booking type defaults are no longer required to be configured. Any booking type can be associated with any stage.

To enable this feature, please contact OpenAir Support!

Enable Bookings to be Auto-Approved

This feature permits the [Submitter] meta-entity to be selected for user and project booking approvals. Bookings are then automatically approved once submitted.

To enable this feature, please contact OpenAir Support!

Extended Project Assignment Profile Option

This feature enables the "Project assignment profile" dropdown in the following forms:

- New multiple bookings form (Resources > Bookings > New, multiple)
- Booking worksheet (classic and dynamic) (Resources > Bookings > Worksheet)

To enable this feature, please contact OpenAir Support!
Optional Booking on Approved Booking Requests

Set whether approving a booking request automatically creates a booking or not. When approving booking requests, you can now select a check box to approve a booking request but not create bookings.

To enable this feature, please contact OpenAir Support!

Profile Type Security Access

This feature makes a new checkbox column named "Restricted" available in Administration > Resource Settings > Resource Profiles, and two new roles available: "View restricted profiles" and "View and modify restricted profiles".

When a resource profile has been marked as restricted, users without the view or view and modify roles, will no longer be able to see or edit that resource profile throughout the application.

To enable this feature, please contact OpenAir Support!

"Require Job Code" Setting for Dynamic and Advanced Booking Worksheets

Use this feature to require users to input a job code when creating bookings in the Dynamic or Advanced Booking Worksheets. When this feature is enabled, if a booking is created or modified, a message will appear for each booking row which does not have a job code assigned to it.
Optional Features Book

"Require Job Code" Setting for Dynamic and Advanced Booking Worksheets

To enable this feature, please contact OpenAir Support!

Resource Booking Approvals

Allows bookings to flow through an approval process. Bookings will have Open, Submitted, Rejected and Approved statuses linked to Booking Types.

**Note:** The booking approval feature is mutually exclusive with the booking request feature. When booking approvals have been enabled, all existing bookings will be in the "Approved" stage.

To enable this feature, please contact OpenAir Support!

Resource Compare View

Use the new Resource Compare View to compare resources at a glance and better manage large pools of resources!

There are three ways 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 to add to the Compare View, 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 open to the Compare View, click the "Compare View" button in the "Resource comparison" window or go to Resources > Compare view.

In the Compare View, add resources to compare by clicking the "Add Resource" button and selecting them from a multi-select list. Left click on an unselected 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.

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.

As you scroll down the category skills category list, the resource name headers remain in view.

Lastly, to book a resource from the Comparison table, click the "Create Booking" button, which opens a "New booking" form. From here, enter all of the booking's details. When the New Booking form first opens, the booking dates are based on the "Resource availability" dates set in the Comparison table, but can be changed when entering the booking information in the form.

To use this feature, your account must have access to the Resource module. In addition, non-administrators can access this feature if they have access to the Resource module and have been assigned the "Enable Resource Compare View" role permission. To use the QuickViews described here, please ask OpenAir Support to enable the QuickViews feature.

To enable this feature, please contact OpenAir Support!

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**Resource Demand Request (RDR)**

Resource Demand Request (RDR) can be used to find and book resources. It starts by defining the needed skills then continues through search and resource selection based on several indicators (e.g. skills match, utilization %) which leads to the last step - issuing standard OpenAir bookings for selected resources.

RDR handles booking in a robust way, providing a more transparent overview of the booking progress at each step of its lifetime.

To enable this feature, please contact OpenAir Support!
Resource Demand Request “Essential” Category for Search Base Criteria

Use the “Essential” category in RDR to include only resources with the skills selected.

The “Essential” 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.
As with the other categories, “Essential” can be renamed in Terminology. It is highly recommended to check terminology changes for consistency before committing to the changes.

To enable this feature, please contact OpenAir Support!

Resource Demand Request Queues Cannot be Finalized If Availability is Zero

With this feature, Resource Demand Request Queues can no longer be finalized if the availability hours or percentage is set to 0.

To enable this feature, please contact OpenAir Support!

Resource Planner

The resource booking planner provides a global view on bookings by calendar and resource utilization calculated per day, week or month. It is the perfect tool to spot under or over utilization and to quickly resolve it.

Simply drag and drop to quickly reassign a booking from one resource to another. Drag a box over the required date period next to an existing booking and a new booking will be created, pre-populated with values from the original booking and the selected date range. Open the Edit Booking form by clicking the Edit this booking icon or use the More options icon to create, edit, duplicate or delete bookings directly from the resource planner. Overbooked resources are highlighted in the client view. When a booking is changed the utilization bar is changed to “Unknown”. The new utilization is calculated when the booking is saved. All bookings for one resource can be rolled up to one line to use less space if there are no overlapping bookings. Two new options are made available on the booking planner settings to give the visibility of resources which are inactive or with no bookings for the specified period.

In the redesigned resource booking planner, the Refresh button and the Legend have been relocated to the toolbar. This increases the screen real estate for data on the resource booking planner grid and chart.

To enable this feature, please contact OpenAir Support!
With this feature enabled, overbooked resources are highlighted in the client view. Click the arrow on the left to get to the resource view and analyze why the overutilization has occurred.

**Restricted Skills in Consolidated Resource Profile**

Restrict and hide skills by role permission in Consolidated Resource Profile.

![Resource Profile Options](image)

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 new 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 enable this feature, please contact OpenAir Support!

**Show Project Assignment Profiles on Task Assignments**

This feature ensures that assignment profile values on a task's assignments always remain visible via the user interface and related reports.
Visibility includes on the Task Assignment section of the Create/Edit task form, project outline view, and as a task detail field on reports.

To enable this feature, please contact OpenAir Support!

Skills Approvals

Get control over your resources' skills! With this feature, you can delegate the responsibility of keeping your resources' profiles up-to-date. The system notifies you when your resources update their skills in the Resource Profile. With your approval, the skills are updated.

<table>
<thead>
<tr>
<th>Tech skill</th>
<th>PENDING</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTML</td>
<td>[Intermediate]</td>
</tr>
</tbody>
</table>

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 one of your resources makes a change to their resource profile and clicks Save & Submit, the change is marked with a "Pending" tag in their profile.

You will also receive a notification that your resource has made a change to their resource profile. You can set these notifications in Administration > Application Settings > Resources Settings > Notifications. Once set, email notifications will be sent as with other types of approvals when changes are submitted. Reminders will also appear on the Dashboard.

To enable this feature, please contact OpenAir Support!

Use Booking Request Grid to Enter Multiple Requests That Are Available

Similar to the resource booking grid, a booking request grid has been added to Resources to help save time and offer increased flexibility. Using the grid, create multiple booking requests that vary in booking amounts and save and submit them from the grid. A resource can be booked for different hour or percentage amounts during the course of a project. Custom fields can also be added to the grid to tailor the information captured to unique company needs.

To enable this feature, please contact OpenAir Support!
Use Booking Request Grid to Enter Multiple Requests That Are Available

<table>
<thead>
<tr>
<th>Approval Status</th>
<th>Booking type</th>
<th>Project assignm</th>
<th>Resource</th>
<th>Client: Project</th>
<th>Task</th>
<th>09/09/13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
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<td>Select...</td>
<td>Adams, Mary</td>
<td>Webb Inc: PSA 10: Define data mig</td>
<td>32</td>
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<td>34</td>
<td></td>
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<td>0</td>
</tr>
<tr>
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<td>Select...</td>
<td>Select...</td>
<td>0</td>
</tr>
</tbody>
</table>
Invoices

The following optional Invoices features are available in OpenAir. Some features require OpenAir Support to enable them for you.

- Additional Option for Invoice Layout Terminology Overrides
- Advanced Agreement and Customer PO Balance Calculation
- Allow an Approver to Edit a Submitted Invoice
- Credit and Re-Bill Functionality for Invoices
- Display a Zero Sum Tax Rate and Amount on Invoices
- Enhanced Workflow Process Invoice Submission and Revenue Container Creation
- Forex Precision Control for Invoices
- Generate Charges for Partial Periods
- Ignore Booked Hours If Worked or Approved Hours Are Logged
- Include “Time Entry Payroll Type” in Invoices
- Negative Charge Stages
- Negative Charge Stages by Quantity
- Prevent Invoicing and Revenue Recognition Per Customer PO and Agreement
- Pro-Rate Selected Charges
- Revenue Recognition Projections Prioritize Logged Time Over Booked Time
- Set Credit Invoice Date When Creating Invoices for Credit/Rebill
- Subtotal and Sort Expense Item Groups on Invoices

Additional Option for Invoice Layout Terminology Overrides

For companies that send invoices to their clients directly from OpenAir, different invoice layouts can be configured to modify the appearance of an invoice based on client needs. Invoice layouts can be assigned at the client, project or invoice level. In addition to being able to sort or group items, the terminology for certain fields can be overridden and applied to that specific invoice layout. OpenAir enhanced the configuration capabilities of invoice layouts by adding the ability to override the terminology for "Agreement" and "Customer PO". This feature adds overriding the terminology for "Customer PO Number".

To enable this feature, please contact OpenAir Support!
Advanced Agreement and Customer PO Balance Calculation

OpenAir’s agreement and customer PO functionality permits companies to track what’s been billed against an agreed upon amount with their client. For example, if a client agrees to a $10,000 contract for a project, an agreement or customer PO can be created for the $10,000. As work is being performed and charges are generated via billing, the contract amount can then be drawn down based on charge amounts. As the project progresses, it is beneficial to see the remaining balance on the contract to ensure that the project is still on track.

OpenAir has the option for advanced balance calculations for agreements and customer POs. With this advanced calculation, users have the ability to configure charge stages indicating when charges should be deducted from the agreement or customer PO balance. Within a charge stage, users can choose to have the balance deducted for all charges, charges placed on an invoice, charges not on an invoice, or no charges. The agreement or customer PO balance will deduct the charge amount from the balance based on the rule selection on the charge stage. For example, if the rule for the “Write-Off” charge stage is set such that no charges placed in that charge stage should be deducted, any charge placed in that charge stage will never be deducted from the balance.

To enable this feature, please contact OpenAir Support!
Allow an Approver to Edit a Submitted Invoice

Companies often require their users to submit invoices for approval by the finance department or management. To ensure the billing process is not delayed, it is beneficial for the approver to be able to make modifications to the invoice or associated charges. Previously, to make changes to the invoice, it needed to be rejected.

When this feature is enabled, to edit a submitted invoices, approvers navigate to Invoices > Invoices > Submitted and select an invoice. To edit the invoice header information, click on the "Edit" or "Properties" link. Edit the form and click Save. To edit the associated charges, click on the "Change charges" or "Charges" link. Edit or remove individual charges.

To enable this feature, please contact OpenAir Support!

Credit and Re-Bill Functionality for Invoices

OpenAir’s invoicing functionality permits 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.

This feature streamlines the process of crediting an invoice and re-billing associated charges once a credit has been issued. A new Credit/Rebill link is now available within an approved timesheet that
Credit and Re-Bill Functionality for Invoices

permits 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 this feature, please contact OpenAir Support!

Display a Zero Sum Tax Rate and Amount on Invoices

For companies that send invoices to their customers directly from OpenAir, multiple invoice layouts can be configured to enhance the appearance of the invoice. For various reasons, it may be necessary to display the total tax amount, even if the tax amount is zero.

OpenAir has the ability for users to enter a zero percentage for the tax rate if leveraging tax locations. When a percentage for a tax location is entered as a blank or zero value, the percentage rate will be saved as 0%.

To enable this feature, please contact OpenAir Support!
Enhanced Workflow Process Invoice Submission and Revenue Container Creation

This feature enhances the workflow process for invoice submission and revenue container creation. When billing has been run and an invoice has been created, a new link is now available on the invoice screen that will submit the invoice, run revenue recognition on the project, and create a revenue container in one single click. When all actions have been performed, users will automatically be brought to the Balance Summary page of the new revenue container. The system will perform the appropriate checks to ensure that the project meets all the criteria for a new revenue container.
**Enhanced Workflow Process Invoice Submission and Revenue Container Creation**

**Note:** If there is an existing revenue container that has not yet been approved, an error message will appear indicating that an open or submitted revenue container still exists and therefore the system cannot automatically submit the invoice and create the revenue container. There will be a link in the error message pointing to the existing revenue container that needs to be approved.

To enable this feature, please contact OpenAir Support!

**Forex Precision Control for Invoices**

For invoices and revenue recognition transactions, the following currencies now have fixed decimal places matching the number of decimal places for these currencies in NetSuite.

To enable this feature, please contact OpenAir Support!

<table>
<thead>
<tr>
<th>Currency Name</th>
<th>Currency Abbreviation</th>
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<tr>
<td>Belarusian ruble</td>
<td>BYR</td>
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</tr>
<tr>
<td>Burundian franc</td>
<td>BIF</td>
<td>0</td>
</tr>
<tr>
<td>Central African CFA franc (Financial Community of Africa)</td>
<td>XAF</td>
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</tr>
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<td>CFP franc (Pacific Franc Exchange)</td>
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</tr>
<tr>
<td>Ugandan shilling</td>
<td>UGX</td>
<td>0</td>
</tr>
<tr>
<td>Vanuatu vatu</td>
<td>VUV</td>
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</tr>
<tr>
<td>Vietnamese dong</td>
<td>VND</td>
<td>0</td>
</tr>
<tr>
<td>West African CFA franc (Financial Community of Africa)</td>
<td>XOF</td>
<td>0</td>
</tr>
<tr>
<td>Yemeni rial</td>
<td>YER</td>
<td>0</td>
</tr>
<tr>
<td>Zambian kwacha</td>
<td>ZMK</td>
<td>0</td>
</tr>
<tr>
<td>Angolan kwanza</td>
<td>AOA</td>
<td>1</td>
</tr>
<tr>
<td>Macanese pataca</td>
<td>MOP</td>
<td>1</td>
</tr>
<tr>
<td>New Taiwan dollar</td>
<td>TWD</td>
<td>1</td>
</tr>
<tr>
<td>Bahraini dinar</td>
<td>BHD</td>
<td>3</td>
</tr>
<tr>
<td>Iraqi dinar</td>
<td>IQD</td>
<td>3</td>
</tr>
<tr>
<td>Jordanian dinar</td>
<td>JOD</td>
<td>3</td>
</tr>
<tr>
<td>Kuwaiti dinar</td>
<td>KWD</td>
<td>3</td>
</tr>
<tr>
<td>Libyan dinar</td>
<td>LYD</td>
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<td>Omani rial</td>
<td>OMR</td>
<td>3</td>
</tr>
<tr>
<td>Tunisian dinar</td>
<td>TND</td>
<td>3</td>
</tr>
</tbody>
</table>

Generate Charges for Partial Periods

This feature permits a user to generate charges for incomplete periods. For example, a user wants to charge a customer $1000 a month on the 1st of each month. But a one month contract was signed on the 15th which means that the customer needs to be charged $500 for the current month and $500 for the next month.

This feature is used to create fractional charges for incomplete periods.
This feature works for:

- Project > Financials > Billing Rules (fixed fee on date or milestone)
- Project > Financials > Revenue Recognition Rules (fixed amount on date or milestone rule)

⚠️ Important: This feature is not designed to work with the repeat for X number of instances option.

To enable this feature, please contact OpenAir Support!

Ignore Booked Hours If Worked or Approved Hours Are Logged

Use your employees’ and contractors’ actual logged time instead of their booked time when logged time exists!

When you enable this feature, your revenue recognition and charge projections use your resources' actual logged time and disregards booked time for the same resource in the same period. If a resource hasn't logged any actual time in OpenAir, the revenue recognition projection uses the booking for its calculations instead.

To enable this setting, contact OpenAir Support and ask them to enable the "Ignore Booked Hours If Worked or Approved Hours Are Logged" feature. Then, go to Administration > Application settings > Projects settings > Charge Projections and select either the "Approved and booked hours (ignore booked hours if worked or approved hours are logged)" or the "Worked and booked hours (ignore booked hours if worked or approved hours are logged)" option.

To enable this feature, please contact OpenAir Support!

Include “Time Entry Payroll Type” in Invoices

Add the time entry payroll type to your invoices, and group invoices based on payroll type.

To include the time entry payroll type in your invoices, go to Administration > Application Settings > Invoices Settings > Invoice layouts > [Select an Invoice Layout] and go to the Invoice columns or Invoice groupings sections.
**Negative Charge Stages**

There is a new option available from Administration > Application Settings > Invoices Setting > Charge stages > [select Charge stage] > [Options].

Charge stages can be considered as 'Regular' or 'Negative' based on the setting of the All charges within this stage to be multiplied by -1 checkbox:

- **Negative Stage** - All charges within this stage to be multiplied by -1 is checked.
- **Regular Stage** - All charges within this stage to be multiplied by -1 is NOT checked.

When a charge is moved from a Regular Stage to a Negative Stage (and vice versa) the charge is multiplied by -1. The charge is not changed if it is moved between two stages of the same type.

Negative charge stages cannot be selected on billing rules.

To enable this feature, please contact OpenAir Support!

**Negative Charge Stages by Quantity**

This option is available to multiply by quantity instead of rate when using negative charge stages. This permits the account to decide if they want the QTY or the RATE multiplied by -1.

To enable this feature, please contact OpenAir Support!
Prevent Invoicing and Revenue Recognition Per Customer PO and Agreement

Often, companies plan Customer POs and Agreements and have users begin work before they are signed. In addition to having users log time and expenses, accurate billing and revenue forecasting is necessary for these cases. However, since these are considered to be part of at risk projects, invoicing, revenue recognition transaction, and revenue container creation should be prohibited.

OpenAir has the ability to designate specific Customer POs and Agreements that should prevent invoicing and revenue recognition creation. If a Customer PO / Agreement has the option enabled, users will not be able to use the associated charges in invoices, revenue recognition transactions or revenue containers for that Customer PO / Agreement until that option has been disabled. However, billing rules, revenue recognition rules, charge and revenue projections, project billing transactions, and charges can be created for the project.

To enable this feature, please contact OpenAir Support!
Pro-Rate Selected Charges

This feature lets you select one or more charges and then pro-rate the charges total.

You enter one of the value fields and the other two are then automatically calculated. For example, if the Total selected is $1,600.00 and 80% is entered into Retain % then Retain total is assigned 1280 and Move remaining is assigned 320.

You can move the remaining total to a specific charge stage.

To enable this feature, please contact OpenAir Support!
Revenue Recognition Projections Prioritize Logged Time Over Booked Time

Use your employees' and contractors' actual logged time instead of their booked time when logged time exists!

When you enable this feature, your revenue recognition and charge projections use your resources' actual logged time and disregards booked time for the same resource in the same period. If a resource hasn't logged any actual time in OpenAir, the revenue recognition projection uses the booking for its calculations instead.

To enable this setting, contact NetSuite OpenAir Support and ask them to enable the "Ignore Booked Hours If Worked or Approved Hours Are Logged" feature. Then, go to Administration > Application settings > Projects settings > Charge Projections and select either the "Approved and booked hours (ignore booked hours if worked or approved hours are logged)" or the "Worked and booked hours (ignore booked hours if worked or approved hours are logged)" option.

To enable this feature, please contact OpenAir Support!

Set Credit Invoice Date When Creating Invoices for Credit/Rebill

Apply credit invoices to the right period with the ability to enter an invoice date when you create the credit invoice.

A new setting allows Administrators to set an "Invoice credit date" as either the date from the original invoice or today's date (the default option). This date is visible on credit invoices, and can be edited until the credit invoice is approved.

To set the Credit Invoice Date, navigate to Administration > Application Settings > Invoices Settings > Invoice credit date.

Subtotal and Sort Expense Item Groups on Invoices

These features allow you to change the sorting and subtotal appearance in invoices.

- **Sort all expense items alphabetically** — when selected, all expense items are sorted alphabetically. If cleared, the order in which these expenses groups were created is preserved.

- **Display subtotals for custom expense item groups when using alternate invoice layout for expense charges** — Select this option to display subtotals for custom expense item groups on invoices.

**Note:** These features are only supported when the invoice layout uses custom groupings and an alternate layout for expenses.

To change these settings, go to Administration > Application Settings > Invoice Settings > Invoice layouts > [select a layout] and go to the “Combine charges” section of the form.

To enable this feature, please contact OpenAir Support!
Note: This feature also requires invoice layouts to allow users to define aggregate expense items. To enable this feature, please contact OpenAir Support and request the Enable Custom Groupings of Expense Item Charges on an Invoice account setting.
Reports

The following optional Reports features are available in OpenAir. Some features require OpenAir Support to enable them for you.

- Audit Trail Values Available in Summary Reports
- Contact Information Fields on Tabular and Crosstabbed Reports and List Views
- CSV Pivot Tables Can Respect User Regional Settings
- Custom Fields Available as Filters in Selected Reports
- Email Scheduled Reports to a Contact from the Contacts List
- Enable Booking Approval Status in Reports
- Exclude Specific Values from Filters in Reports
- Hide Personal User Data and Hours Remaining in the Timesheet Report
- Loaded Cost Respects Time Entry Date Regardless of Date to Use Value in Reports
- Meta-Values in Entity Filters
- Next-Generation Report Editor
- Organize Saved Reports in Specified Folder
- Project Hierarchy Settings in User Detail Report
- Project Crosstab Date Filters
- Report Management
- Report on More than 31 Days When Reporting on Daily Time Periods
- Report Throttling
- Web Services Log Details Report

Audit Trail Values Available in Summary Reports

This feature leverages the audit information stored in OpenAir and permits users to run a summary report on individual form values for a specified time period and have the report return what the value was at that specified point in time. In addition, it displays the user name of whoever changed the value.

To enable this feature, please contact OpenAir Support!
Contact Information Fields on Tabular and Crosstabbed Reports and List Views

Add any contact information fields available in a project to your reports and project list views.

When creating reports, you can now select any contact information fields which you use in projects and display them in reports and project list views. The following contact fields are supported:

<table>
<thead>
<tr>
<th>Active</th>
<th>Address line one</th>
<th>Address line two</th>
<th>Audit trail</th>
<th>Can be a billing contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can be a shipping contact</td>
<td>Can be a sold to contact</td>
<td>City</td>
<td>Client</td>
<td>Client — business type</td>
</tr>
<tr>
<td>Country</td>
<td>Created</td>
<td>Email address</td>
<td>Fax number</td>
<td>First</td>
</tr>
<tr>
<td>Internal id</td>
<td>Internal id — customer_id</td>
<td>Job title</td>
<td>Last</td>
<td>Mobile number</td>
</tr>
<tr>
<td>Name</td>
<td>Notes</td>
<td>Phone number</td>
<td>Project status</td>
<td>State/Province</td>
</tr>
<tr>
<td>Title</td>
<td>Type</td>
<td>Updated</td>
<td>Zip/Postal code</td>
<td></td>
</tr>
</tbody>
</table>

These fields can be used in both Tabular and Crosstabbed reports when creating reports using the report form or the Report Management and Report Editor tools. These fields are also available in any project list views.
Note: If you have enabled any of the following settings on your account, contact information fields will be available to view in list views and reports:

- Enable shipping contacts
- Enable sold to contacts
- Allow create and modify of client's contacts directly from project properties form

Please contact OpenAir Support to enable or disable these settings.

CSV Pivot Tables Can Respect User Regional Settings

This feature enables a new option for CSV Pivot Tables exports to respect user regional settings to delimit values.

To enable this feature, please contact OpenAir Support!
Custom Fields Available as Filters in Selected Reports

This feature makes user and project custom fields available as filters in selected detail reports:

- Project and user custom fields are available in Time entry and Receipt detail reports.
- Project custom fields are available in Charge and Revenue transaction detail reports.

To enable this feature, please contact OpenAir Support!

Email Scheduled Reports to a Contact from the Contacts List

With this feature, users have the option to send scheduled reports to additional email addresses on the Contacts list. Enter contact information including the email address in the Contacts form and send reports to that email address.

When the report runs, the results will be sent to the contact’s email address.

To enable this feature, please contact OpenAir Support!

Enable Booking Approval Status in Reports

This feature enables a booking approval status column and filter in both summary and detail reports.
Enable Booking Approval Status in Reports

Note: To be able to use booking approval status in the slip/revenue projection reports, the projections need to be re-run. Projections will be re-run over the weekend after the release.

To enable this feature, please contact OpenAir Support!

Exclude Specific Values from Filters in Reports

OpenAir reporting permits great flexibility in providing key information to users and managers. In addition to selecting a multitude of reporting values, users can configure filters within a report to limit the items that need to be included in the report. For example, if running a utilization report, managers may choose to only report on the utilization value for full-time employees. To do this, users would click on the Resource filter on the report edit form and include the individual users that should be displayed in the report results. For some companies, there may be a larger number of full-time employees than part-time employees and therefore managers may wish to exclude the part-time employees from the report rather than include all full-time employees.

Furthermore, new full-time employees may continue to be hired. This feature adds the ability for users to select an option to exclude values from specific filters in a report. In the aforementioned example, a user may wish to exclude part-time employees. Thus, all existing and newly hired full-time employees will automatically be included in the report results.

To enable this feature, please contact OpenAir Support!
Exclude Specific Values from Filters in Reports

Optional Features Book

Hide Personal User Data and Hours Remaining in the Timesheet Report

Keep personal user data safe with a new feature which hides this data in the timesheet report.

This feature hides personal data from timesheet reports, but not from other reports where you may need that information.

To hide personal user data in Timesheet reports:

1. Go to Administration > Application settings > Timesheets settings > Timesheet report layout.
2. Select "Hide personal user information on timesheet reports".

**Note:** The "Hide personal user information on timesheet reports" option will not appear in the Timesheet report layout form if your company has the "Hide personal employee information on reports" internal setting enabled. Please contact NetSuite OpenAir Support to enable or disable this internal setting.

The "Hours Remaining" field in Timesheet Reports can also be hidden.

To hide the “Hours Remaining” field in Timesheet Reports:

1. Go to Administration > Application Settings > Timesheets Settings > Timesheet report layout.
2. In the “Other” section of the Timesheet report layout form, select the "Hide “Hours remaining on tasks” section on timesheet reports” setting.
Loaded Cost Respects Time Entry Date Regardless of Date to Use Value in Reports

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. With this feature, users can choose to only apply the ‘date to use’ value to either the forex conversion or the loaded cost values.

To enable this feature, please contact OpenAir Support!

![Image of Reporting Options]

Meta-Values in Entity Filters

Use the [Me] and [My Department] meta-values in filters to publish or share reports with only your projects displayed.
To enable this feature, please contact OpenAir Support!

Next-Generation Report Editor

With this feature, build the right reports faster with a more intuitive report editor. Create reports visually with drag-and-drop elements, pickers, and filters. Every action, from setting up the columns and rows to running the full report, is performed on one screen in the editor UI – no page refreshes or transfers between a report form and viewer!

To enable this feature, please contact OpenAir Support!
Organize Saved Reports in Specified Folder

OpenAir reports often fall into distinct categories such as Financials, Project status, Resource management, etc. As an account may have a very high volume of saved reports, it is helpful to group specific reports together based on report type. With this feature, saved reports can now be organized into different report folders and sub-folders. Report folders can be expanded or collapsed depending upon the need to view certain reports in a particular folder. In addition, folders can be shared with other users - reports within the folder will also be shared.

To enable this feature, please contact OpenAir Support!
Project Hierarchy Settings in User Detail Report

This feature enables a new "project hierarchy" value in the user detail report.

To enable this feature, please contact OpenAir Support!

Project Crosstab Date Filters

Use new filters to better define the scope of your reports.

The new filters include:

- Scheduled project start date
- Calculated project finish date
- Project created date

To enable this feature, please contact OpenAir Support!

Report Management

With this feature, quickly find the saved reports and report templates you need by report name or filter by report content. Search to see the reports rated by how popular they are with OpenAir users. Get a quick report configuration preview without losing the search results. See all the available report actions and select directly from the search results.

To enable this feature, please contact OpenAir Support!
Report on More than 31 Days When Reporting on Daily Time Periods

For companies that run summary reports with daily time periods, the actual number of periods can be extended. By enabling this feature, users can choose to report up to either 60 or 90 days. This enhancement permits users to display report values in a daily view for multiple months at a time.

To enable this feature, please contact OpenAir Support!

Report Throttling

With this feature, the number of reports a user can run in parallel can be set to a value between 1 and 10. Individual users can be exempt from the limit (i.e. allowed to run unlimited reports in parallel) by enabling the Disable Report Throttling Demographic setting for the user.

When a user tries to run a report but has already reached their limit, the user is presented with a list of their currently running reports and given the option to stop one of them to run the requested report. If the user does not want to stop a report they can cancel the request and either schedule the report or try to run the report later.

To enable this feature, please contact OpenAir Support!
Web Services Log Details Report

This feature adds the ability to include web service requests and responses within the application. This will help troubleshoot any API requests that fail.

To enable this feature, please contact OpenAir Support!
Platform

The following optional Platform features are available in OpenAir. Some features require OpenAir Support to enable them for you.

- Form Scripts
- Scheduled Scripts
- Script Deployment Logs
- Scripting Center
- Scripting Studio
- Script Support for Web Service API Methods
- Script Support for HTTPS Methods
- Unapprove Event
- User Scripting

Form Scripts

Form scripts are written in JavaScript and stored in a dedicated scripting workspace. Form scripts consist of specifying the event to trigger the script to run and the function defined in the script (attached to the form) to call.

**Note:** Form scripts are executed within the context of the user who is logged in.

This feature also enables the Reports > Detail > Form script deployment logs report for administrators to report on the status of all deployed scheduled scripts.

See the OpenAir User Scripting Guide for more details.

To enable this feature, please contact OpenAir Support!

Scheduled Scripts

Scheduled scripts are created in a similar way to form scripts and follow the scripting workflow. The main differences are that scheduled scripts are not associated with a form, have higher governance limits, and are executed according to a schedule defined when they are deployed.
**Note:** Scheduled scripts are executed within the context of a user. You need to specify the user under which the script is to be executed when you deploy the script.

This feature also enables the Reports > Detail > Scheduled script deployment logs report for administrators to report on the status of all deployed scheduled scripts.

See the OpenAir User Scripting Guide for more details.

To enable this feature, please contact OpenAir Support!

### Script Deployment Logs

See how many log entries are part of a log without having to open each log.

This feature shows a count of log entries as part of the "View Log" link for Form and Scheduled Script Deployments.
The number of logs also appears next to the "View Log" link in the Scripting Editor.

To use this feature, go to the User Center > Personal Settings > Scripting Studio Options and select the "Display the number of logs at 'View logs' link" option.

**Scripting Center**

The Scripting Center gives you complete control over all script deployments and development activities from a central location.
The only thing you cannot do from the Scripting Center is actually edit a script. This is the function of the Scripting Studio. However, customers that choose not to use the Scripting Studio in favor or another editor are still fully supported from the Scripting Center.

You can enable the Scripting Center to create either form scripts (see Form Scripts), scheduled scripts (see Scheduled Scripts), or both.

See the OpenAir User Scripting Guide for more details.

To enable this feature, please contact OpenAir Support.

**Note:** Once enabled, this feature has one related user role setting:

- View the script deployment log report

## Scripting Studio

Script developers can use the Scripting Studio to quickly create scripts with a full screen editor supported by intuitive tools with drag-and-drop functionality.
The Scripting Studio includes the following functions:

- Auto List and Complete
- Smart Entrance Function
- SOAP Explorer
- NSOA Explorer

See the OpenAir User Scripting Guide for more details.

To enable this feature, please contact OpenAir Support!

### Script Support for Web Service API Methods

This feature allows you to access NSOA.wsapi functions for user scripting.

![Code Snippet]

**Note:** To create user scripts in OpenAir, you need to be logged in as an administrator and be able to access the Scripting Center and Scripting Studio.

### Script Support for HTTPS Methods

This feature allows you to access NSOA.https functions for user scripting.

Integrate OpenAir with other online applications using outbound calls.

This feature allows you to access NSOA.https functions for user scripting and to execute workflow processes automatically from OpenAir across to other APIs, using form or scheduled scripts.
The feature includes:

- Two new NSOA functions supporting the HTTPS GET and POST request methods to read and send data from/to external APIs.
- A new Password script parameter, allowing you to store encrypted credentials and use them in your scripts for secure deployment and maintenance.

Possible use cases include integration with Jira for agile development, Slack for team collaboration, Office 365 for notifications, or other external or bespoke APIs in your environment.

**Note:** To create user scripts in OpenAir, you need to be logged in as an administrator and be able to access the Scripting Center and Scripting Studio.

**Unapprove Event**

Create scripts which are triggered when the following are unapproved:

- Timesheets
- Schedule Requests
- Booking Requests
- Bookings
- Purchase Requests
- Purchase Orders
- Expense Reports
- Invoices
The format to use for when an "unapprove" argument is passed is:

```javascript
function main(type) {
    if (type == 'unapprove') {
        // custom unapprove actions
    }
}
```

To enable this feature, please contact OpenAir Support!

**User Scripting**

Write user scripts in the industry-standard JavaScript language and trigger them with form events.
User scripting allows you to interact with forms and access the SOAP API, opening a wide range of possibilities.

To enable this feature, please contact OpenAir Support!
NS Connector

The following optional NS Connector features are available in OpenAir. Some features require OpenAir Support to enable them for you.

- High-Frequency Real-Time Support
- Import Taxes Applied to Exported OpenAir Credits
- Integrate All Viable Time Entries
- Maximum Number of Threads Used by NS Connector
- Purchase Requests Integrated on Approval
- New NS Connector UI
- NS Connector Import/Export Settings
- OpenAir Revenue Recognition Rules and Transactions with NetSuite Advanced Revenue Management (ARM)
- Token-Based Authentication (TBA) for NS Connector
- Use TBA Authentication Exclusively

High-Frequency Real-Time Support

Make multiple updates to the same record within a short period of time with High-Frequency Real-Time Support.

When enabled, this feature guarantees that if additional updates are made to a record as it is being sent for real-time integration, the additional changes are also immediately integrated.

**Note:** Changing a record while it is being integrated in real-time may result in other records being re-integrated to guarantee the integration. Records which are re-integrated are shown in the integration log.

To enable this feature, please contact OpenAir Support.

Import Taxes Applied to Exported OpenAir Credits

Include tax amounts in OpenAir credit invoices which can then be passed to NetSuite credit memos. This feature supports two workflows in both the old and new NS Connector UI:

- Credit an existing invoice, for example, through OpenAir’s Credit/Rebill feature
- Creating a separate credit memo which is not linked to an invoice

To enable this feature, go to Administration > Global Settings > Account > Integration: NetSuite. In the NetSuite integration screen, click the Tips button and click "NetSuite integration admin". Enter your Integration Settings password and select the following option:

- Import taxes applied to exported OA Credit (negative invoice) (Send OA Credit (negative invoice) as NS credit memo)

You must also select the "Import taxes applied to exported invoices" option in the Invoices (Invoices) chapter settings, and be sure that you have bundle 2851 version 1.36.
Integrate All Viable Time Entries

Integrate all viable time entries to NetSuite when a timesheet contains time entries which should not be exported.

When this feature is enabled, all time entries in a timesheet are checked for export to NetSuite, and if they are supposed to be integrated to NetSuite, the integration tries to send them.

When disabled, the timesheet integration ends after the first time entry which should not go to NetSuite is found (for example, if a NS project ID or category ID are missing).

To enable this feature, please contact OpenAir Support!

Maximum Number of Threads Used by NS Connector

Control how many threads the NS Connector uses for integrations with SuiteCloud Plus!

Customers with SuiteCloud Plus can now request the number of threads they want to dedicate to NetSuite Connector's integrations. The value can be set from 1 to 10 threads concurrently. The number of concurrent threads defaults to 10 threads unless another value is requested.

Customers without SuiteCloud Plus are always limited to 1 thread for the integration.

To enable this feature, please contact OpenAir Support!

New NS Connector UI

NS Connector's new visual mapping interface helps you match NetSuite fields to OpenAir fields, with a clear indication of direction of information flow. Easily add new chapters and fields to your mapping.

The UI contains the following features:

- **Chapter Settings** – View and change settings for each chapter by clicking the Settings link.
- **Chapter Information** – View important chapter information from the Tips button. With new integrations or when you have new custom fields, you can sync them by clicking “Synchronize NetSuite custom fields”. From the Tips menu, you can also show relevant old advanced mappings.
- **Chapter Record Filters** – Click the “Filters” link on a chapter to apply a filter to the record. When a filter is set, the “Filters” link appears bold. Filters use existing notation.
- **Chapter Records** – Set all related mappings for a chapter by pointing and clicking. Most chapter records have their own filters, with full support for old UI filters. A continuation list (...) appears when space is limited.
- **Pullback Mappings** – Visually map pull-back fields. Click the “Pullback row” button to add a pullback row. An orange arrow icon identifies a pullback row. Pullback rows are mapped like standard mappings, and are used to define values to be pulled back when a record is created.
- **Mapping Rules** – Set rules at the field level to define complex mappings. To set mapping rules, click the Rules icon. The first line of the rule shows in the field. Mapping rules use existing notation.

**Note:** Mapping Rules comments are not exported in this UI.

To transition to the new UI:
1. Export your settings from the old UI.
2. Request the “Enable” the new NetSuite integration UI” switch from Support.
3. Import your settings from the Tips button while in the NetSuite integration screen.
4. If you are exporting from one account to another account, reapply the custom imports and exchange rate integrations under Administration > Global Settings > Integration:NetSuite > [Tips button] > NetSuite Integration Admin > Custom imports and Exchange rate integration.
5. Verify that your integration works as expected.

**NS Connector Import/Export Settings**

Save and load your configuration settings to archive versions and transfer settings between accounts. Settings are exported as a JSON file which can be used to transfer settings between accounts, to archive settings, or to migrate settings to the new UI.

**Note:** Solutions documentation links do not get saved to the solution file.

The new form supports both importing and exporting of settings. The old form only supports exporting of settings.
OpenAir Revenue Recognition Rules and Transactions with NetSuite Advanced Revenue Management (ARM)

NS Connector now supports integrations of selected OpenAir Revenue Recognition Rules with NetSuite's Advanced Revenue Management.

The following OpenAir Revenue Recognition Rules are currently supported by NetSuite's Advanced Revenue Management:

- As Billed
- Fixed Amount on Date or Milestone
- Percent Complete
- Incurred vs. Forecast
- Time Project Rule

The first step in sending OpenAir Revenue Recognition Transactions to NetSuite is to configure the OpenAir Advanced Revenue Management plugin in NetSuite. This process must only be completed once and is valid for all Revenue Recognition Rules supported by Advanced Revenue Management. Next, configure a Revenue Recognition Rule in OpenAir which is supported by Advanced Revenue Management. Finally, set up the mappings for the rule on the Mappings page in NS Connector. Mappings can be configured in either the old or new NS Connector UI.

When OpenAir runs Revenue Recognition Rules, it creates Revenue Recognition Transactions for each line in the rule. When Advanced Revenue Management is triggered in NetSuite, NS Connector creates a Revenue Event and a custom record in NetSuite from the Transaction. The custom record says which rule created the Revenue Transaction, and tells Advanced Revenue Management how to account for the Revenue Event.

Advanced Revenue Management creates NetSuite Revenue Elements from each Revenue Event for each Revenue Recognition Transaction. These Elements are then used by ARM.

Please see the OpenAir NS Connector Guide for more information on configuring your OpenAir Recognition Rules with NetSuite ARM.
Purchase Requests Integrated on Approval

Integrate purchase requests on approval in real-time!

This feature also adds the ability to control purchase request integrations through scripting.

To integrate purchase requests on approval in real time:

1. Go to Administration > Global Settings > Account > Integration: NetSuite and click the "Real-time" tab.
2. In the "Object" dropdown list, select Purchase Requests. In the "Event" dropdown list, select "Approval".
3. In the "Active" column, click the toggle button to "On".

Token-Based Authentication (TBA) for NS Connector

Use Token-Based Authentication for NS Connector for greater security and to use real-time integrations, even without SuiteCloud Plus!

Token-Based Authentication makes all real-time integration features available to everyone. In addition, with Token-Based Authentication, your integration users will no longer need to change their integration passwords. The security is also stronger because of TBA's request-level signatures.

Note: Using Token-Based Authentication does not enable multi-threading, and only allows interleaving.

Token-Based Authentication requires the 2016.2 Communication Endpoint. To enable it, please contact OpenAir Support. We recommend testing your integration with this new endpoint on a sandbox before fully implementing it.

It is recommended to enable the Use TBA Authentication Exclusively feature when setting up Token-Based Authentication.
Use TBA Authentication Exclusively

It is recommended to enable the Use TBA authentication exclusively feature when setting up Token-Based Authentication (TBA) for NS Connector.

This feature makes the TBA credentials mandatory and removes the password and Web Service Role from the credentials form so you don't need to keep changing the NetSuite Integration password.

To enable this feature, please contact OpenAir Support!
Release History

In this section you can find each feature which appears in the Optional Features Book listed by its release date.

Tip: You can use this section to identify which features have been released since your last update.

April 13, 2019
- Redesigned OpenAir User Experience Phase 3
- Added New List Options under Redesigned OpenAir User Experience Phase 2
- Added Column Filters under Redesigned OpenAir User Experience Phase 2
- Added Inline Edit in the Project Tasks List View under Redesigned OpenAir User Experience Phase 2
- Use TBA Authentication Exclusively
- Script Support for HTTPS Methods
- Feature-Specific User Satisfaction Feedback Form

October 13, 2018
- Booking Assignment Date Filters
- Customized User Avatars
- Decouple RDR Header and RRQ Booking Type
- Redesigned OpenAir User Experience Phase 2

April 14, 2018
- Integrate All Viable Time Entries
- Meta-Values in Entity Filters
- OpenAir Revenue Recognition Rules and Transactions with NetSuite Advanced Revenue Management (ARM)
- Project Crosstab Date Filters
- Publish Shared Reports using OpenAir BI Connector
- Redesigned OpenAir User Experience
- Restricted Skills in Consolidated Resource Profile
- Save List View Configurations
- Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata
- Verify Password Change

October 14, 2017
- Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets
April 15, 2017

- Maximum Number of Threads Used by NS Connector
- OpenAir Business Intelligence Connector
- Show Billing Rules on Revenue Recognition Forms
- Token-Based Authentication (TBA) for NS Connector

October 15, 2016

- Advanced Booking Worksheet
- Allow Users to Un-approve Budgets
- Automatic Backup Service (ABS) MySQL Import File “Apply Relationships” Option
- Automatic Backup Service (ABS) MySQL Import File UTF-8 Option
- Custom Form Layouts
- High-Frequency Real-Time Support
- Ignore Booked Hours If Worked or Approved Hours Are Logged
- Import Taxes Applied to Exported OpenAir Credits
- Include “Time Entry Payroll Type” in Invoices
- New Selector for Customizing List Views
- Project Status Summaries (PSS)
- Resource Compare View
- Resource Demand Request Queues Cannot be Finalized If Availability is Zero
- Revenue Recognition Projections Prioritize Logged Time Over Booked Time
April 16, 2016

- Set Credit Invoice Date When Creating Invoices for Credit/Rebill
- Client Contact Information in Project Properties
- Forex Precision Control for Invoices
- NS Connector Import/Export Settings
- Optional Booking on Approved Booking Requests
- Performance Console
- QuickView Customization Options
- Select Period for Attachments Backup in Automatic Backup System (ABS)
- Unapprove Event

October 17, 2015

- Color-Coding on Actual versus Planned View
- Compare Budgets
- New NS Connector UI
- Increase the Maximum Count of NetSuite Integration Schedule Runs Per Day
- Next-Generation Report Editor
- QuickViews for Bookings
- QuickViews for Projects
- QuickViews for Tasks
- Report Management
- Resource Demand Request "Essential" Category for Search Base Criteria

April 18, 2015

- Add Multiple Profiles
- Automatic Backup Service Confirmation on File Transfer Completion
- Automatic Backup Service (ABS) Implicit and Explicit FTPS Transfers
- Automatically Create Overlapping Timesheet
- Project Budgets
- Control Editing Submitted Entities by Approvers via Role Permissions
- CSV Pivot Tables Can Respect User Regional Settings
- Exclude Project from Charge Projections
- Hide the Daily, Weekly, or Monthly Resource Planner Options
- QuickViews for Employees
- Resource Icons on the Outline and Gantt View
Streamlined Budget Approvals

October 18, 2014
- Additional Booking Specific Approvers
- Automating Tax Location
- Bulk Booking Editor
- Close a Task for a Specific User for Timesheets and Expenses
- Display the Booking's Requester Name in “Last Name, First Name Middle Name” Format in Reports
- Generate Account Specific WSDL
- Generate Charges for Partial Periods
- Hide the Project Progress Bar
- Prevent Deletion of Users Assigned to Tasks with Logged Hours
- Scheduled Scripts
- Scripting Center
- Scripting Studio
- Set Preferred Landing Page for Projects
- Stop Slow Lists
- Stop Slow Reports
- View All Receipts on One List

May 17, 2014
- Allow the Owner/Requester/Administrator to Upload Attachments for Approved Objects
- Customization Center
- Inline Editing, Drag-and-Drop Functionality, and Enhanced Gantt Layout
- Negative Charge Stages by Quantity
- Prevent Invoicing and Revenue Recognition Per Customer PO and Agreement
- Report Throttling
- Resource Planner
- Web Services Log Details Report

February 15, 2014
- Adjust an Approved Expense Report
- Custom Fields Available as Filters in Selected Reports
- Negative Charge Stages
- Phase/Task Filter in “Incurred vs. Forecast Rule”
- Pro-Rate Selected Charges
- Resource Demand Request (RDR)
- Subtotal and Sort Expense Item Groups on Invoices
- Update Time Entries Based on Booking Types

November 16, 2013
- Audit Trail Values Available in Summary Reports
- Auto-Create Bookings for Generic Resources
- Bulk Delete Action Respects Booking Rules
- Custom Booking Approvals Notifications
- Disable New, Multiple Bookings Option
- Enable a Booking Type to Exist in All Approval Statuses
- Enable Booking Approval Status in Reports
- Enable Bookings to be Auto-Approved
- Profile Type Security Access
- Show Project Assignment Profiles on Task Assignments
- Time Entries Match Task Assignments
- User Scripting

August 17, 2013
- Script Support for Web Service API Methods

March 16, 2013
- Automated Search Engine for Booking Creation
- Extended Project Assignment Profile Option
- Project Assignment Profiles
- Resource Booking Approvals
- User-Level Outline View

November 17, 2012
- Loaded Cost Respects Time Entry Date Regardless of Date to Use Value in Reports

September 15, 2012
- Additional Functionality for Expense Policies on Per-Project Basis
- Display a Zero Sum Tax Rate and Amount on Invoices
- View Audit Information for Custom Fields in Table Format on Forms
June 15, 2012
- One Project Per Expense Report

May 12, 2012
- Select Different Currencies for Loaded Cost Overrides

March 17, 2012
- Adjust Planned/Assigned Hours Based on Actual Work
- Apply Phase Filtering in Time Billing Rules
- Form Scripts
- Prevent Invoicing and Revenue Recognition on a Per-Project Basis

January 21, 2012
- Automatically Add New Users to Assignment Groups
- Conditional Dropdown Custom Fields
- Create Portfolio and Sub Projects and Share Billing Rule Caps across Multiple Projects
- New “Booking Type” Filter in Revenue Recognition Rule

November 19, 2011
- Advanced Agreement and Customer PO Balance Calculation

September 17, 2011
- Configure Time Entry Rounding at the User Level
- Enhanced Workflow Process Invoice Submission and Revenue Container Creation

July 16, 2011
- Credit and Re-Bill Functionality for Invoices

January 28, 2011
- Configure Customized Email Notifications
January 22, 2011
- Additional Option for Invoice Layout Terminology Overrides

September 18, 2010
- Define Charges to Recognize in “As Billed” Revenue Recognition Rules
- Exclude Specific Values from Filters in Reports
- Multiple Schedule Exceptions Per Day via Time Off Requests
- Organize Saved Reports in Specified Folder

July 17, 2010
- Allow an Approver to Edit a Submitted Invoice
- Optionally View and Assign Revenue Hours for Recognition Transactions

May 21, 2010
- View Tasks for Inactive Projects in Task List View

May 15, 2010
- Proxy Confirmations

January 23, 2010
- Automatically Receive PDF Attachments of Approved Timesheets and Expense upon Approval
- Self-Rejection of Timesheets

November 21, 2009
- Report on More than 31 Days When Reporting on Daily Time Periods

September 19, 2009
- Single Sign-On Integration Leveraging SAML

July 18, 2009
- Accounting Period Functionality
- Assign Project Job Codes for Users on a Per Project Basis
June 9, 2009
- Enable Integration with NetSuite

May 16, 2009
- Restrict Specific Custom Fields from Being Copied

March 21, 2009
- Display Contacts in "Last Name, First Name" Format in Drop-down Menus

January 17, 2009
- Line Item Rejection in Timesheets
- Project Hierarchy Settings in User Detail Report

November 22, 2008
- Active Directory Integration

September 13, 2008
- Custom Field Pick List
- Default Options on Task Assignment
- Prevent Entry of Future Time at the User Level
- Time Entry Grid Filtering

August 7, 2008
- User-Defined Reporting Currencies

July 19, 2008
- Use Booking Request Grid to Enter Multiple Requests That Are Available

May 17, 2008
- Email Scheduled Reports to a Contact from the Contacts List
December 10, 2007
- Foreign Currency Receipts in Expense Grid
- Suppress Email Notifications or Add Addresses to Notifications

September 13, 2007
- Custom Field Allocation Worksheets

August 31, 2007
- Hide Divider Sections on Forms

April 2, 2007
- Allow an Administrator to Edit the Exchange Cross Rate Table

August 24, 2006
- Set the Timesheet Duration At the User Level

June 15, 2005
- Un-export Records from a Specific Application via UI

August 26, 2004
- Calculate Remaining Hours Using Approved Hours Instead of Worked Hours

October 20, 2003
- Use Zero Hours Rather than Planned Hours for Users’ “Hours Remaining” Estimates

July 31, 2003
- Display Payroll Type Field on Time Entries List View

Optional Features Book
February 12, 2003

- Filter Timesheet Report by Project

August 12, 2002

- Use Days Instead of Hours for All Time Entries