Get a Global View of Your Bookings by Calendar Date and Utilization with Resource Booking Planner!

**HOW DOES RESOURCE BOOKING PLANNER WORK?**

- The Resource Booking Planner provides a global view of bookings.
- View bookings by resource or by client
- Drag resources on the schedule to reassign them

**WHAT CAN RESOURCE BOOKING PLANNER DO FOR ME?**

- Help you manage your bookings with an intuitive interface
- Instantly identify overutilization
- Save time by making bulk changes to multiple resources and bookings all at once

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Create a New Resource Request and Queue  ➔  Refine Search Criteria  ➔  Select Desired Resources  ➔  Book Resources to Projects
Resource Booking Planner Quick Reference

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Resource Booking Planner

Resource Utilization Overview

The Resource Booking Planner provides a global view of bookings by calendar and resource utilization calculated per day, week, or month. You can reassign bookings from one resource to another using drag-and-drop functionality. Visualization in the Resource Booking Planner provides an easy and accurate way to check and resolve booking conflicts or overutilization.

Use Advanced Filters to limit the number of bookings displayed on screen.

Click the Refresh icon to reload the view and show current data.

The utilization bar for each resource shows their utilization for a given period of time.

The time range displayed can be customized here. The maximum displayed range is 100 days.

Click the navigation icons to move forward or backward either 50% or 100% of the defined time range.

Choose to calculate utilization on a daily, weekly, or monthly basis.

Hover the mouse over Legend to display the flyout color-coding and icon legend.

Click here to clear all filters. Use the Expand all and Collapse all buttons to show or hide various levels in the Resource List.

The sort icons indicate whether a column heading is the primary, secondary, or tertiary sort criteria.
- Primary – white arrow
- Secondary – yellow arrow
- Tertiary – green arrow

Click the Cog icon to open a window with customization settings.

Click the Refresh icon to reload the view and show current data.

To enable these features, please contact OpenAir Support and request the Enable resource planner switch. Once enabled, administrators can access the View resource planner and Create and modify bookings in the resource planner roles.

The Resource Booking Planner is located under Resources > Bookings > Planner. If QuickViews are enabled, you can also find it by selecting Booking Planner from the QuickView window.

Hover the mouse over Legend to display the flyout color-coding and icon legend.
Compact Resource Utilization Overview

The Resource Booking Planner’s Resource List and schedule can be compacted to display all bookings for a resource on one line. Overlapping bookings will still be shown on multiple lines. To activate Compact view, click the Cog icon and select Resource > Compact.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Utilization Bar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Huff, Sue</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>95%</td>
</tr>
<tr>
<td></td>
<td>Cooper Software HRS system config.</td>
</tr>
<tr>
<td>Humbert, Bill</td>
<td>55%</td>
</tr>
<tr>
<td></td>
<td>117%</td>
</tr>
<tr>
<td></td>
<td>Cooper Software HRS system config.</td>
</tr>
<tr>
<td></td>
<td>Cooper Software HRS system config.</td>
</tr>
<tr>
<td>Jameson, Gary</td>
<td>65%</td>
</tr>
<tr>
<td></td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>Tinnerman Group Software implement</td>
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<td></td>
<td>Tinnerman Group Software implement</td>
</tr>
<tr>
<td></td>
<td>Tinnerman Group Software implement</td>
</tr>
<tr>
<td>Kelly, Joan</td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>Medva Inc. CRM implementation</td>
</tr>
<tr>
<td></td>
<td>Medva Inc. CRM implementation - Align</td>
</tr>
<tr>
<td></td>
<td>Luis Software Custom web app - IDE</td>
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<tr>
<td>Krause, Franc</td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>United Software Add-on services</td>
</tr>
<tr>
<td></td>
<td>United Software Add-on services</td>
</tr>
</tbody>
</table>

Only resources appear in the Resource / Booking list.

The Utilization bar shows the percent utilization for each period.

Bookings for each resource are shown on one line, unless overlapping bookings exist.
Bookings by Client Overview
The Client View functions similarly to the Resource View, but bookings are organized into a hierarchy of Clients, Projects, and Tasks, rather than just Resources and Bookings. Booked resources are the focus of its Schedule View; only overutilization, and not utilization, are shown.

Click the Go to booking arrow icon to return to Resource View with the selected booking highlighted there.

A list of booked resources appears here. Each is color-coded according to their booking status, and icons indicate their approval status.

Hover the mouse over Legend to display a flyout legend which shows you what each color means. You can customize these colors by clicking the Cog icon in the top right.

Overtages are outlined in red. To see detailed information about the overage, click booking bar, and then click the Go to booking arrow on the left for the selected booking. You will return to Resource View, which will show which bookings conflict.

Click and drag a new booking bar in a blank space to open a New Booking window with prepopulated Resource, Task, Booking Percentage, Booking Type, Start, and End Date fields.

You can change a booking’s start and end dates in Client View by dragging it left or right.
Create a Booking
There are two methods for creating a new booking in the Booking Resource Planner

Method 1 – In the Resource List
Click a Create a new booking for this resource icon to open the New Booking form with the Resource field prepopulated.

Method 2 – In the Schedule
Click and drag a new booking bar to open a New Booking form prepopulated with the Resource, Start and End Dates, Project, Task, Book by, and Booking Type fields.

When you’ve added the information to the booking form, click Save & Submit, Save, or Save & create another.
Edit Bookings

There are many ways to edit existing bookings from the Resource Booking Planner's Resource View (with the “Individually” option selected from the Cog menu).

- Click the beginning or end of a booking bar and drag it to change the booking start and end date.
- Click and drag a booking bar left or right to change the start and end dates while keeping the same duration.
- Click and drag a booking up and down from one resource to another.

Click an Edit this booking icon to open the Booking Form.

Click the Context Sensitive Menu icon to open a menu to add a new booking, clone an existing booking, or delete a booking. Clicking on a booking bar also opens this Context Sensitive Menu.

Click on dates to change them in-line.

Point to a booking in the Schedule to open a QuickView where you can Edit, Delete, or Clone the booking.
Bulk Booking Changes

Bulk Actions is a powerful tool which allows you to make changes to multiple bookings at once.

Select the bookings you want to perform bulk actions on.

Click Bulk actions to open a window with actions to perform on all selected bookings.

Select View the selected bookings in the bulk editor to open the Bulk Editor window (below).

You have several options for saving your bulk changes:
- Save & submit original
- Duplicate & submit
- Save original
- Duplicate

To make bulk changes, click the Cog icon and select Bulk Actions > Enabled.

To enable this feature, please contact OpenAir Support and request the Enable booking bulk editor switch. Support can also enable the following switches:
- Prevent bookings from multiple Persons from being saved or duplicated to a single Person in the booking bulk editor
- Prevent changes to both the Person and the client fields while using the booking bulk editor.

This switch also enables the View and modify bookings in the bulk editor and View, modify, and duplicate bookings in the bulk editor roles.

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