

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

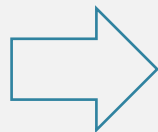
### HOW DOES RESOURCE BOOKING PLANNER WORK?

- 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

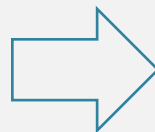
### WHAT CAN RESOURCE BOOKING PLANNER DO FOR ME?

- 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

**Create a  
New  
Resource  
Request  
and Queue**



**Refine  
Search  
Criteria**



**Select  
Desired  
Resources**



**Book  
Resources  
to Projects**

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### 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.

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.

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

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

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.

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

The screenshot displays the Resource Booking Planner interface. At the top, there's a navigation bar with 'Cancel' and 'Save' buttons. Below it, a filter dropdown is set to 'All'. The main area shows a table with columns for 'Resource/Booking', 'Start date', and 'End date'. The table lists bookings for two resources: 'Pimm, Joe' and 'Porter, Marie'. Each booking entry includes a checkbox, a description, and a utilization percentage. To the right of the table, there's a calendar view for July 2013, showing utilization bars for each day. At the bottom, there's a status bar with various filters and a 'Last refresh' timestamp.

Utilization: Available < 100% Booked 100% Overage > 100% Unavailable Holiday Time off Unknown

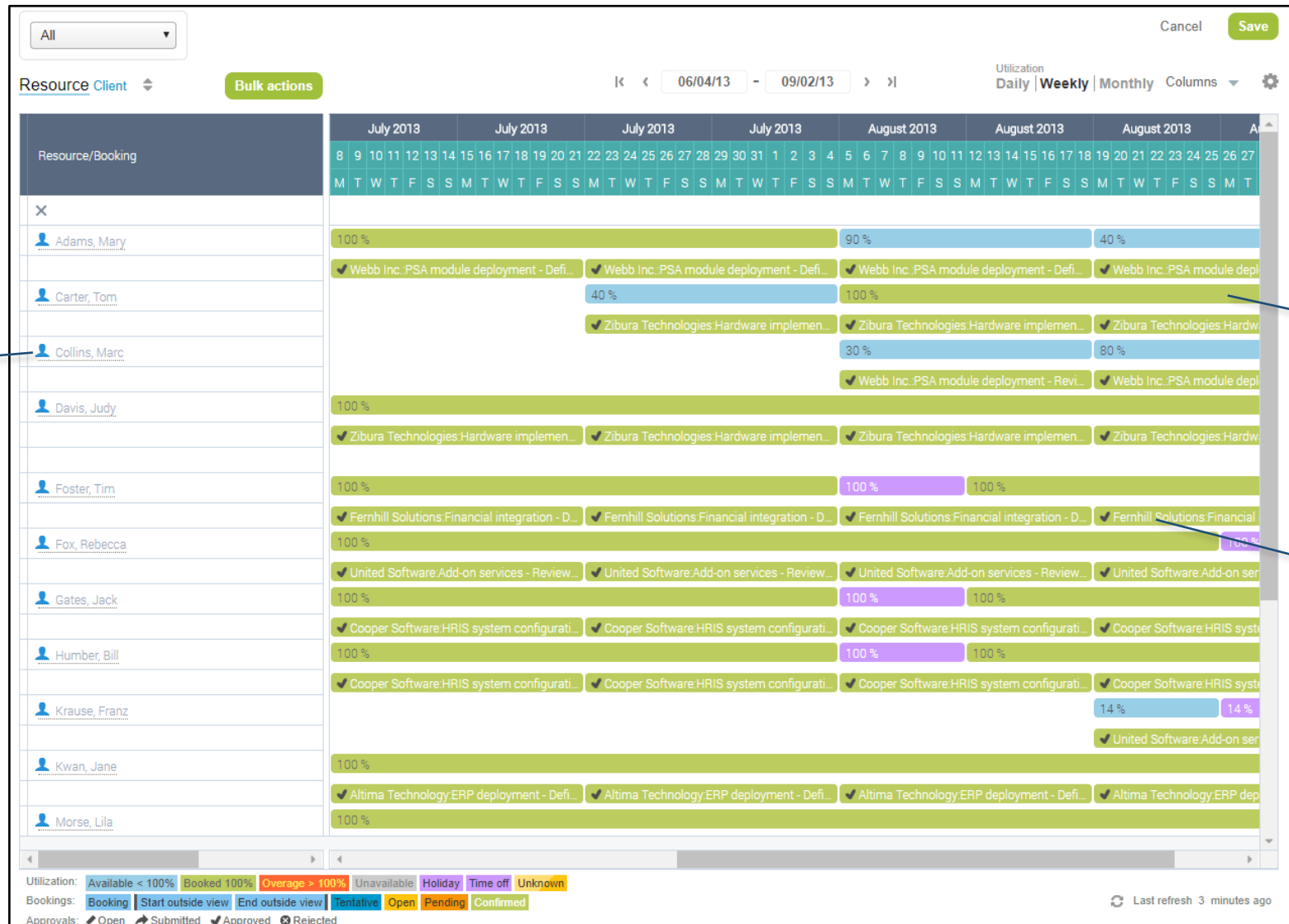
Bookings: Booking Start outside view End outside view Tentative Open Pending Confirmed

Approvals: Open Submitted Approved Rejected

Last refresh 0 minutes ago

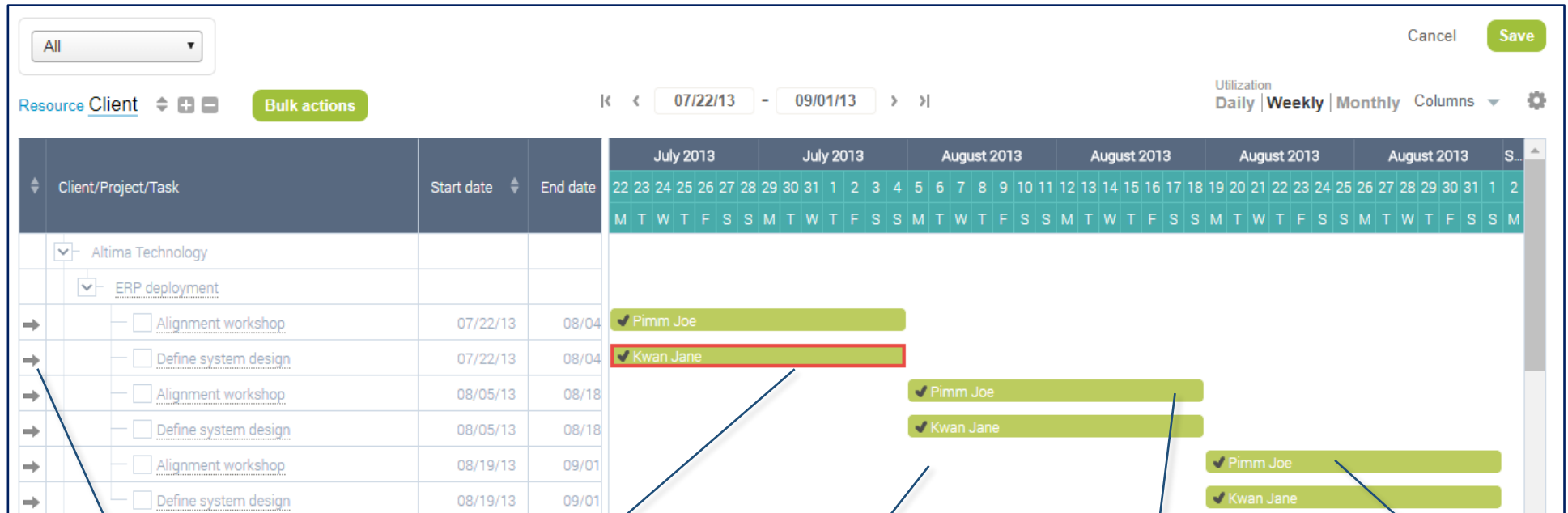
### Compact Resource Utilization Overview

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.



### 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.

Overages 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.

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

You can change a booking's start and end dates in Client View by dragging it left or right.

Bookings: Booking Start outside view End outside view Overage Open Pending Confirmed  
 Approvals: Open Submitted Approved Rejected

The legend at the bottom of the screen shows you what each color means. You can customize these colors by clicking the Cog icon in the top 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.

Resource Client ⬆ ⬆ ⬆ Bulk actions

	Resource/Booking
	 Pimm, Joe
	<input type="checkbox"/> Altima Technology:ERP deployment - Alignment workshop 100.00 %
	<input type="checkbox"/> Altima Technology:ERP deployment - Alignment workshop 100.00 %
	<input type="checkbox"/> Altima Technology:ERP deployment - Alignment workshop 100.00 %
	<input type="checkbox"/> Altima Technology:ERP deployment - Alignment workshop 100.00 %
	<input type="checkbox"/> Altima Technology:ERP deployment - Alignment workshop 100.00 %

07/22/13 - 09/01/13

July 2013							July 2013							August 2013						
22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	
M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	
✓ Cooper Software HRIS system configurat...																				
100 %																				
✓ Cooper Software HRIS system configurat...																				
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100 %																				

## 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**.

Cancel

Save & Submit

Save



Save & create another

General


Resource

Garcia, Juan


Client : Project


Select...  

Task


Select... 

Period during which to book this resource

Start date (MM/DD/YY) \* 

End date (MM/DD/YY) \* 

Booking type

Open 

Requester


Collins, Marc

Repeat booking [> Create](#)

Book by

☒ Percentage of time: 100
 ☐ Number of hours: 0

Project assignment profile

Select... 

Notes

⌵ Attachments

Current Attachment(s)

(none)


New Attachment

Browse...

No file selected.

or

Choose a file from a workspace

Workspace: Select... 

Document: please choose a workspace

Cancel

Save & Submit

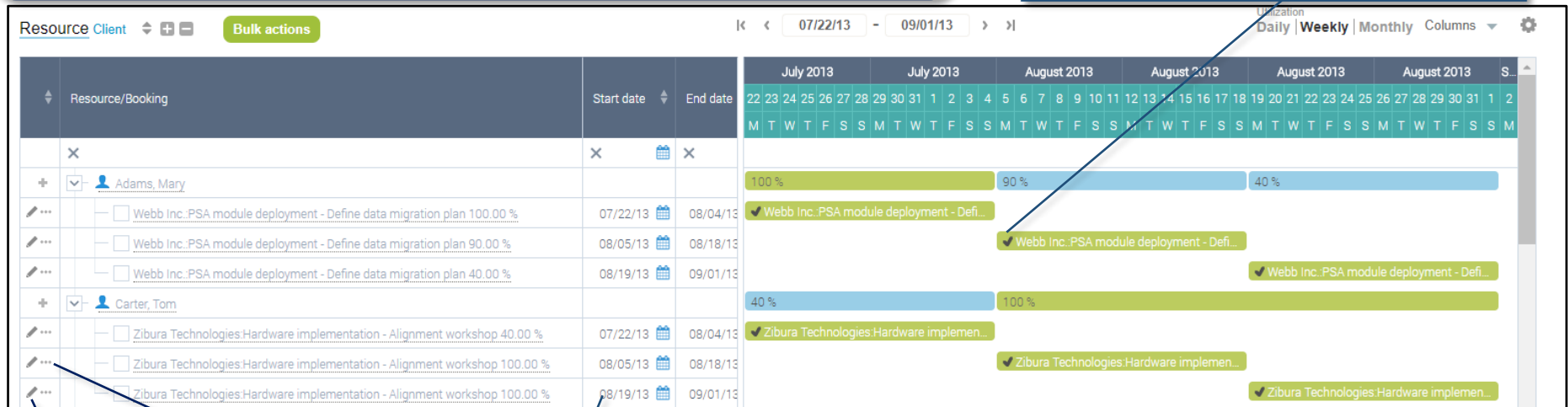
Save

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.

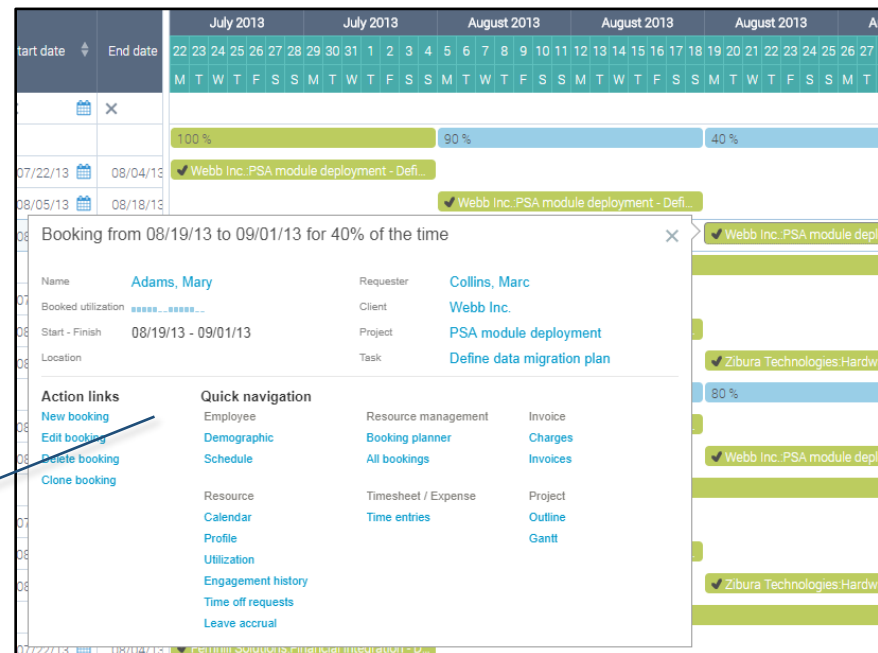


Click an **Edit this booking** icon to open the Booking Form.

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.

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.

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

Resource Client [Cog] [Bulk actions]

Resource/Booking

Three bookings selected

- ☒ No action on the selected bookings
- ☐ Delete the selected bookings
- ☐ Change the resource to [Select...]
- ☐ Change the booking type to Open
- ☐ Submit the selected bookings
- ☐ Move the selected bookings [ ] days
- ☐ Change the dates of the selected bookings

Start date (MM/DD/YY) [ ] End date (MM/DD/YY) [ ]

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**

Your selected bookings appear here.

Resource Icons	
Icon	Description
	<b>Active Resource</b> - An active resource who can be assigned to tasks, record time, etc.
	<b>Inactive Resource</b> - When a resource is inactive, they cannot log in to the OpenAir account, enter time, expenses, etc.
	<b>Active Generic Resource</b> - Use when you know the type of resource needed but not the specific individual. Generic resources cannot record time or expenses and can only be used for forecasting.
	<b>Inactive Generic Resource</b> - Use when you know the type of resource needed but not the specific individual. Cannot log in to OpenAir, enter time, expenses, etc. They can be replaced with a real resource later.

Make your changes to the selected bookings here.

Editing 4 bookings [Save & submit original] [Duplicate & submit] [Save original] [Duplicate] [Reset] [Cancel]

Resource: Adams, Mary

Client: Project

Task: [multiple values]

Period during which to book this resource

Start date (MM/DD/YY)\* [multiple values] End date (MM/DD/YY)\* [multiple values]

Book by: ☒ Percentage of time: [multiple values] ☐ Number of hours: [multiple values]

Booking type: Confirmed

Project assignment profile: Select...

Requester: Collins, Marc

Notes: [ ]

Resource	Client	Project	Start date (MM/DD/YY)	End date (MM/DD/YY)
Adams, Mary	Webb Inc. : PSA module deployment		09/10/15	09/20/15
Adams, Mary	Webb Inc. : PSA module deployment		08/02/15	08/23/15
Adams, Mary	Webb Inc. : PSA module deployment		08/24/15	09/09/15
Adams, Mary	Webb Inc. : PSA module deployment		09/21/15	10/13/15