OpenAir

BlackBerry User Guide

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Introduction

Overview

OpenAir provides OpenAir for BlackBerry as an app for exchanging timesheets and expenses information between your OpenAir account and your BlackBerry. It allows you to keep your timesheets and expenses up-to-date anywhere and anytime. View open timesheets and expense reports that are in your OpenAir account and create and submit new ones. To synchronize changes with OpenAir, use the update function when your device is connected to the Internet via a wireless connection. Changes made in BlackBerry are reflected in your OpenAir account and vice versa. Once submitted, timesheets and expense reports follow the normal approval process in OpenAir.

How to Set Up OpenAir for BlackBerry

There are two steps in setting up OpenAir for BlackBerry: install the app on your BlackBerry device and provide OpenAir user accounts exchange access to OpenAir for BlackBerry.

1. To download the free app:
   - Open BlackBerry App World on your BlackBerry device or computer and search for OpenAir. Click Get it Today.
   - **OR**
   - In OpenAir, go to Administration > Global Settings > Integration: Add-on services. Click the link under OpenAir for BlackBerry to Download. Refer to Installing from OpenAir. To give user accounts exchange access to OpenAir for BlackBerry, refer to Administration.

System Requirements

We have the following system requirements, recommendations, and instructions.

- **System Requirements:** 4 digit model running JAVA OS, Blackberry Enterprise Server with enabled Mobile Data Service, a minimum of 1 MB free on your BlackBerry device, BlackBerry Desktop Manager software, and Microsoft® Windows 95/98/Me/NT/2000/XP/Vista.

- **BlackBerry Enterprise Server Administration:** We recommend that your BlackBerry Enterprise Server administrator adjusts the BES "Maximum number of kilobytes per connection" parameter on the server to at least 1024 KB or higher.

- BlackBerry Storm Instructions: Go into Options > Advanced Options > Applications and select OpenAir BB. Tap Menu and select Disable Compatibility Mode.

How to Use OpenAir for BlackBerry

Once you have entered information in your BlackBerry, use update to synchronize it with your OpenAir account. This app follows common BlackBerry procedures so you will find navigation intuitive. Use the standard BlackBerry keys and features. Refer to Using OpenAir for BlackBerry Features.

- **Menu key** - opens the application list and menu options.
- **Escape key** - moves back to the previous screen or closes a menu.

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- **Send key** - sends what you are working on.
- **End key** - stops what you are working on and returns to the Home screen.
- **Arrows** - display on the screen and show when you are sending and receiving data.
- Move around in the application in the same way you move in all BlackBerry applications.
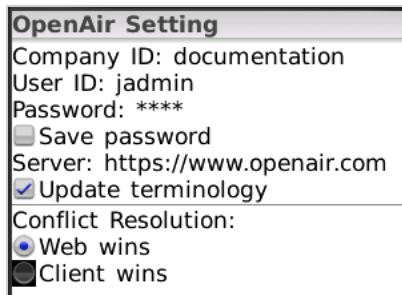
Getting Started

After you have loaded the OpenAir for BlackBerry app, you perform the initial setup to synchronize the OpenAir BlackBerry app with your OpenAir account. This downloads OpenAir customer, project and task information as well as any open timesheets and expense reports. While this initial download may take several minutes, subsequent downloads and updates go more quickly.

To synchronize OpenAir for BlackBerry with your OpenAir account:

1. Click the OpenAir icon 🕐 to launch the application.

   The OpenAir Setting form displays.

2. Type the Company ID, User ID, and Password and press Enter.

   Processing User data displays. When complete, the list of open timesheets and expense reports in your OpenAir account displays.

> ℹ️ **Note:** If you receive a message indicating that a newer version is available, we recommend that you install the new version. Refer to Installing from OpenAir or Installing from BlackBerry App World.

Using OpenAir for BlackBerry Features

The OpenAir for BlackBerry app uses a number of standard features that make your work easier. When you select the Menu key, you can always save, delete or cancel. But in addition to those functions, there are a number of time-saving options available. They include:

- **Select** - Using select, you can copy and paste or clear a field entirely.

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- **Copy** - Highlight text and copy it.
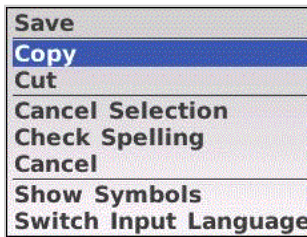
- Paste - Paste the text you highlighted and copied.
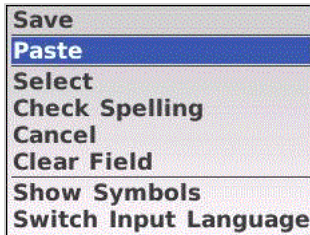
- **Check Spelling** - Check the spelling of everything on the form. Errors display as shown below.
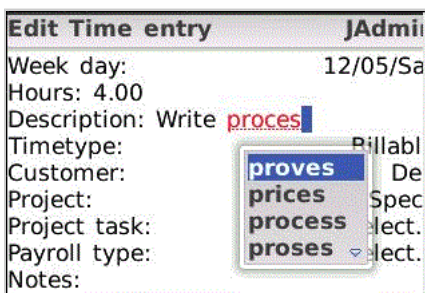
- **Clear Field** - Clear everything you typed into a field. You are prompted to verify your action.
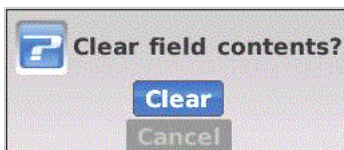
- **Show Symbols** - If you need to enter a symbol such as a dollar sign, symbols display and you can select the symbol you would like to add.
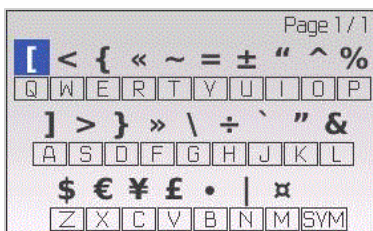
- **Switch Input Language** - You can switch the interface to a variety of different languages.

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Administration

Administrators provide users with permission to exchange information between the OpenAir for BlackBerry app and an OpenAir account. Once you enable Exchange Access to OpenAir for Blackberry for a user and that user downloads the app, the user can communicate with OpenAir Timesheets and Expenses through the BlackBerry app.

To provide users with exchange access:

1. Go to Administration > Users and select a User ID.
2. Click Access control > Exchange Access.

   The Exchange Access form displays.

3. Select OpenAir for Blackberry, click Add selected items and Save.

   Exchange Access is enabled for the OpenAir user account.

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Installation

Once your OpenAir account has exchange access to OpenAir for BlackBerry, you can install the app on your BlackBerry device and access your OpenAir Timesheets and Expense Reports. To install the app, either download the app from your OpenAir account or download it from BlackBerry App World. Refer to the following procedures.

Installing from OpenAir

You can download the OpenAir for BlackBerry app from your OpenAir account and then install it from your personal computer using BlackBerry Desktop Manager. To do this, dock your BlackBerry device to your PC.

1. Log in to your OpenAir account and go to Administration > Global Settings > Integration: Add-on services under Account.

2. Scroll to OpenAir for BlackBerry. Click Download.

    Save file window displays.
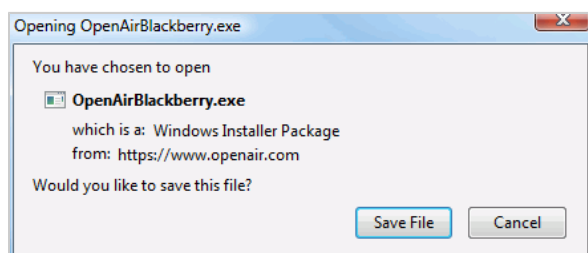
3. Click Save File and specify a location.

4. Locate the file and click on: OpenAirBlackberry.exe

    Setup wizard displays.
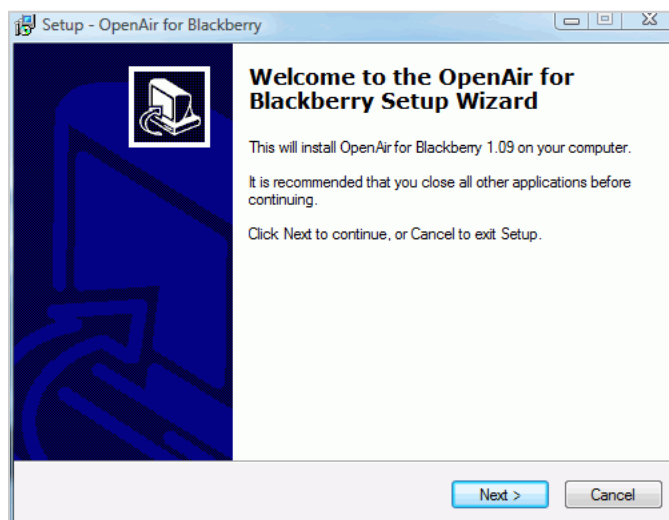
5. Follow the setup procedures until you have finished.

6. Open the BlackBerry Desktop Manager and select Application Loader.

7. Go to the OpenAir for BlackBerry files. Check all items offered for OpenAir and install.

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The OpenAir icon displays on your BlackBerry screen.

Installing from BlackBerry App World

You can download the OpenAir for BlackBerry app from BlackBerry App World.

To download the free app:

1. Open BlackBerry App World on your BlackBerry device or computer.
2. Search for OpenAir.
3. Click Get it Today.

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Using OpenAir for BlackBerry

Use OpenAir for BlackBerry to keep timesheets and expenses information current when you are away from the office. The OpenAir for BlackBerry app allows access to your customer, project, and task information as well as open timesheets and envelopes.

- Create new timesheets or edit existing ones. Clone a time entry to create a new one. Edit and delete entries that no longer apply. Submit and upload timesheets for approval when complete. See Working with Timesheets.
- Create new envelopes for expense reports or edit existing ones. Add new receipts or edit existing ones. Delete receipts or envelopes that are no longer valid. Submit and upload expenses for approval when complete. See Working with Expenses.
- Change existing BlackBerry app settings to match your OpenAir account. It is easy to revise login credentials and server information. See Updating Account Settings.
- Limit the amount of information that displays to only records that are open or only those that have been submitted. See Setting Filters.

Using Update

When you select the Menu key and choose Update, the OpenAir for BlackBerry app communicates with your OpenAir account and exchanges information in both directions. You can update your account information at any time. Create timesheets and expense reports and use Update to load them to OpenAir. Submit them first and follow the normal approval process in OpenAir.

- If you create timesheets and expenses in your BlackBerry app and submit and upload them to OpenAir, they are available in your OpenAir account.
- If you create timesheets and expense reports in OpenAir, they download to your BlackBerry app. Remember, you set filters to display open records or submitted records. See Setting Filters.

Updating Account Settings

The Account Settings form contains OpenAir information for your account such as login credentials and OpenAir server. It also contains conflict resolution settings. You type in your account information the first time you launch OpenAir for BlackBerry.

To update account settings:

1. Select the Menu key and choose Account Settings.

   The OpenAir Setting form displays with your account information.

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2. Make changes as desired.

3. We recommend that you keep the Web wins default for Conflict Resolution. This ensures that list data refreshes from your OpenAir account whenever you perform an Update function. Refer to Updating your Timesheets and Updating your Envelopes

Setting Filters

Use the Set filter function to refine the account information that displays in your OpenAir for BlackBerry app. You can elect to view only submitted timesheets and expenses or all open records.

To set filters:

1. Select either Timesheets or Expenses.

2. Select the Menu key and choose Set filter.

    The Set filters form displays.

Set filters	
User:	JAdmin
Status:	Open

3. Highlight Status and choose Open or Submitted.

4. Select the Menu key and choose Save.

    The list view for Timesheets or Expenses displays Open records or Submitted records.

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Working with Timesheets

Select the Menu key and choose Timesheets to create a timesheet and add time entries. Once established, you can edit and delete both the timesheet and time entries. In addition, you can clone time entries and add them to the timesheet. When you are ready, you simple submit the timesheet and upload it to your OpenAir account. Refer to the following procedures.

- Creating a Timesheet
- Adding a Time Entry to a Timesheet
- Cloning a Time Entry
- Editing a Time Entry in a Timesheet
- Editing a Timesheet
- Submitting a Timesheet
- Updating your Timesheets
- Deleting a Time Entry from a Timesheet
- Deleting a Timesheet

Creating a Timesheet

Use OpenAir for BlackBerry to keep your timesheets current. You can create a timesheet and add time entries to it. If circumstances change, you can easily modify the time entered. You can send the timesheet to your OpenAir account using the update function. Either submit it for approval prior to updating or wait and submit it once it is in your OpenAir account.

To create a timesheet:

1. Launch OpenAir for BlackBerry , or if you are already working in the app, select the Menu key and choose Timesheets.

   Timesheets that are open in your OpenAir account display.

2. Select the Menu key and choose New.

   Edit Timesheet displays. The Timesheet Name is the next available Timesheet in your OpenAir account.

3. Highlight the Date that displays. Accept the default values or change them.

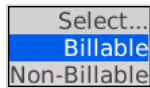4. Highlight Timetype: Select... and choose the timetype.

5. If implemented in your account, highlight Category: Select... and choose the category. In some accounts, the items on this list may be called activities. Activities are not required in all accounts.

6. Highlight Customer: Select... and choose the customer for whom work was accomplished.

7. Highlight Project: Select... and choose the project for which work was accomplished.

8. Highlight Payroll type: Select... and choose the payroll type.

9. Highlight Notes and type notes information.

10. Select the Menu key and choose Save.

    The timesheet you created displays and indicates no time entries are present.

11. To add time entries to the timesheet, see Adding a Time Entry to a Timesheet.

Adding a Time Entry to a Timesheet

Use OpenAir for BlackBerry to add time entries to a timesheet. Once you have created the timesheet, you can add time and make changes to the timesheet information.

To add a time entry to a timesheet you have created:

1. Highlight the timesheet you want to add a time entry to.

2. Select the Menu key and choose Open.

    Timesheet displays.

3. Select the Menu Key and choose New.

    Edit Time entry displays.

4. Highlight Week day: Select... and choose a day.

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5. Highlight Hours and type the number of hours.

6. Highlight Description and type a description.

7. Highlight anything you would like to change and choose a new item.

8. Highlight Project task: Select... and choose the task.

9. Highlight Notes and type information.

10. Select the Menu key and choose Save.

     The updated timesheet displays with the new time entry.

ⓘ **Note:** In addition to being able to save the time entry, you can also perform a number of other functions. See Using OpenAir for BlackBerry Features.

Cloning a Time Entry

Use OpenAir for BlackBerry to clone a time entry in a timesheet to another day. This allows you to set up one time entry and then use it to quickly populate a timesheet with additional time entries.

To clone a time entry:

1. Select the timesheet you would like to clone and choose Open.

2. Select the time entry you would like to clone and select the Menu key.

3. Choose Clone.

   The Edit Time entry form displays.

4. Select a new date and make any other changes.

5. Select the Menu key and choose Save.

   The new time entry displays in the timesheet.

Editing a Time Entry in a Timesheet

Use OpenAir for BlackBerry to edit a time entry in a timesheet.

To edit a time entry:

1. Select the timesheet with the time entry you would like to edit.

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2. Choose the time entry you would like to edit and select the Menu key.

3. Choose Edit.

   The Edit Time entry form displays.

4. Make the changes you would like and select the Menu key.

5. Choose Save.

   The change is reflected in the time entry.

Editing a Timesheet

Use OpenAir for BlackBerry to edit a timesheet.
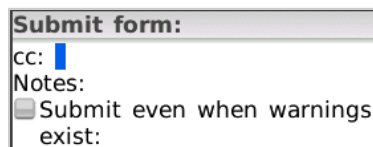
To edit a timesheet:

1. Select the timesheet you would like to edit.

2. Select the Menu key and choose Edit.

   The Edit Timesheet form displays.

3. Make the changes you would like and select the Menu key.

4. Choose Save.

   The changes are reflected in the timesheet.

Submitting a Timesheet

Once you have created a timesheet, you can submit it just as you would in your OpenAir account. Then, you may also update your account and send it to OpenAir. When you update your account, the submitted timesheet transfers to OpenAir and follows the normal approval process.

To submit a timesheet:

1. Select a timesheet you would like to submit to OpenAir.

2. Select the Menu key and choose Open.

   The timesheet displays with all the time entries.

3. Select the Menu key and choose Submit.

   The Submit form displays.

4. If desired, type an additional email address to cc and any notes.

5. Select the check box or leave it blank: Submit even when warning exist.

6. Select the Menu key and choose Submit.

7. After submitting the timesheet, if you would like to update your OpenAir account, select the Menu key and choose Update.

   Submit/Approve status displays.
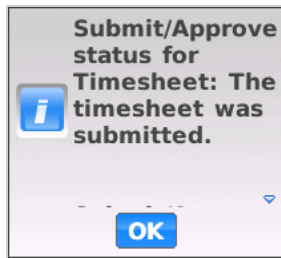
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8. Select OK.

The timesheet uploads and displays in your OpenAir account. It follows the normal approval process.

Updating your Timesheets

Once you have created a timesheet, you can update your OpenAir account to include the new timesheet. You can submit it before you update your account or wait and submit it from your OpenAir account. Once in OpenAir, it follows the normal approval process.

To send a timesheet to your OpenAir account:

1. Select a timesheet you would like to send to OpenAir.

2. Select the Menu key and choose Update.

Connecting to OpenAir server message displays and the timesheet is sent to your OpenAir account.

Deleting a Time Entry from a Timesheet

Use OpenAir for BlackBerry to delete a time entry from a timesheet that has not been submitted and sent to your OpenAir account. When deleted, it is no long available for upload to your OpenAir account.

To delete a time entry from a timesheet:

1. Select the timesheet with a time entry you would like to delete.

2. Choose the time entry you would like to delete.

3. Select the Menu key and

4. choose Delete.

The following prompts for verification.
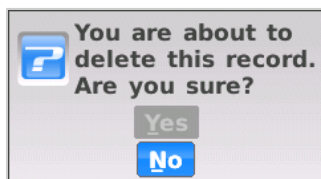
5. To delete, select Yes.

The time entry is deleted.

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Deleting a Timesheet

Use OpenAir for BlackBerry to delete a timesheet. When deleted, it is deleted from your BlackBerry app and cannot be uploaded to your OpenAir account.

To delete a timesheet:

1. Highlight the timesheet you would like to delete.
2. Select the Menu key and choose Edit.

    The Edit Timesheet form displays.
3. Select the Menu key and choose Delete.

    A prompt displays to verify you want to delete the record.
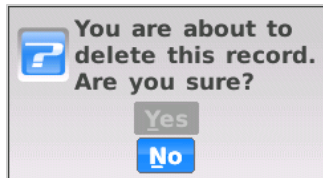
4. Select Yes.

    The timesheet is deleted from your OpenAir for BlackBerry app.

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Working with Expenses

Use OpenAir for BlackBerry to manage your expenses when you are away from the office. As in your OpenAir account, there are a number of tasks you can perform. You can create envelopes and add receipts. You can edit both the envelope and the receipts and you can submit and upload the envelopes to your OpenAir account. Refer to the following procedures.

- Creating an Envelope
- Adding Receipts to an Envelope
- Editing a Receipt
- Editing an Envelope
- Submitting an Envelope
- Updating your Envelopes
- Deleting a Receipt from an Envelope
- Deleting an Envelope

Creating an Envelope

Use OpenAir for BlackBerry to keep your expenses current. You can create an envelope and add receipts to it. If circumstances change, you can easily modify those receipts before you submit the envelope for approval.

To create an envelope:

1. Launch OpenAir for BlackBerry , or if you are already working in the app, select the Menu key and choose Expenses.

   Expenses that are open in your OpenAir account display.

2. Select the Menu key and choose New.

   Edit Envelope displays. The Name defaults to the week for which you are creating the envelope.

3. Highlight Description and type desired description.
4. Highlight Date and accept default or make changes.
5. Highlight Notes and type information.
6. Select Menu key and choose Save.

7. The envelope you created displays and indicates no receipts are present.
8. To add a receipt to the envelope, see Adding Receipts to an Envelope.

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Adding Receipts to an Envelope

Use OpenAir for BlackBerry to add receipts to an open envelope. Once you have added receipts, you can update your OpenAir account to include the new envelope with its new receipts. You can submit it prior to sending it to OpenAir or submit it for approval once it is in your OpenAir account.

To add a receipt to an envelope:

1. Highlight the envelope you would like to add a receipt to.
2. Select the Menu key and choose Open.
3. New or New foreign currency.

    The Edit Receipt form displays.

4. Highlight the Item: Select... and choose a receipt type.
5. Highlight the Date and accept the default or change it.
6. Highlight Description fills in depending on the Item selected. You can accept it or change it.
7. Highlight Payment type: Select... and choose the type of payment.
8. Highlight Status and accept the default or change it.
9. Highlight Customer: Select... and choose the customer.
10. Highlight Project: Select... and choose the project.
11. Highlight Vendor Select... and choose the vendor.
12. Highlight Quantity and accept the default or change it.
13. Highlight Price and type the amount.
14. Highlight Notes and type information.
15. Select the Menu key and choose Save. You can also use optional features. See Using OpenAir for BlackBerry Features.

Editing a Receipt

Use OpenAir for BlackBerry to edit receipts that are in an envelope.

To edit a receipt:

1. Select the envelope that has the receipt you want to edit.
2. Select the Menu key and choose Edit.

    The Edit Receipt form displays.

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3. Make the changes you would like to make.

4. Select the Menu key and choose Save.

   The receipt reflects the changes you made.

Editing an Envelope

Use OpenAir for BlackBerry to edit envelope information.

To edit an envelope:

1. Highlight the envelope you would like to edit.

2. Select the Menu key and choose Edit.

   The edit Envelope form displays.

3. Make the changes you would like to make.

4. Select the Menu key and choose Save.

   The changes you made to the envelope are saved.

Submitting an Envelope

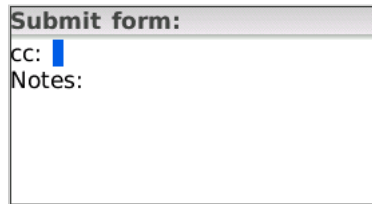Once you have created an envelope and added receipts to it, you can submit it just as you would in your OpenAir account. Then, you may also update your account and send it to OpenAir. When you update your account, the submitted envelope transfers to OpenAir and follows the normal approval process.
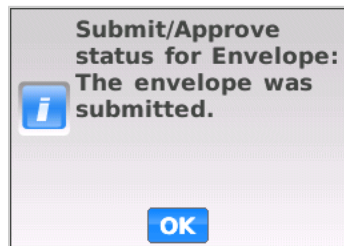
To submit an envelope:

1. Select an envelope you would like to submit to OpenAir.

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2. Select the Menu key and choose Open.

   The envelope displays with its receipts.

3. Select the Menu key and choose Submit.

   The Submit form displays.

4. If desired, type an additional email address to cc and any notes.

5. Select the Menu key and choose Submit.

6. After submitting the timesheet, if you would like to update your OpenAir account, select the Menu key and choose Update.

   Submit/Approve status displays.

7. Select OK.

   The envelope uploads and displays in your OpenAir account. It follows the normal approval process.

Updating your Envelopes

Once you have created an envelope and added one or more receipts, you can update your OpenAir account to include the new envelope. You can submit it before you update your account or wait and submit it from your OpenAir account. Once in OpenAir, it follows the normal approval process.

To send an envelope to your OpenAir account:

1. Select an envelope you would like to send to OpenAir.

2. Select the Menu key and choose Update.

   Connecting to OpenAir server message displays and the envelope is sent to your OpenAir account.

Deleting a Receipt from an Envelope

Use OpenAir for BlackBerry to delete a receipt from an envelope that has not been submitted. When deleted, it is deleted from your BlackBerry app and is no longer available for upload to your OpenAir account.

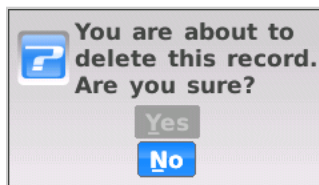OpenAir

To delete a receipt from an envelope:

1. Open the envelope that has the receipt you would like to delete.
2. Highlight the receipt and select the Menu key.
3. Choose Edit.

   The Edit Receipt form displays.

4. Select the Menu key and choose Delete.

   A prompt displays to verify that you want to delete this receipt.

5. Select Yes.

   The receipt is deleted from the envelope.

Deleting an Envelope

Use OpenAir for BlackBerry to delete an envelope that has not been uploaded. When deleted, it is deleted from your iPhone app and cannot be uploaded to your OpenAir account.

To delete an envelope:

1. Highlight the envelope you would like to delete.
2. Select the Menu key and choose Edit.
3. Select the Menu key and choose Delete.

   A prompt displays to verify you want to delete the record.
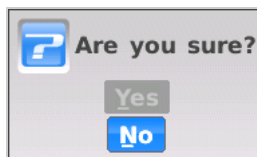
4. Select Yes.

   The envelope is deleted from your OpenAir for BlackBerry app.

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References

References include Troubleshooting procedures as well as Error Codes.

Troubleshooting

If you are having trouble exchanging data using OpenAir for BlackBerry, ensure your administrator has enabled exchange access to OpenAir for BlackBerry for your account. If problems persist or you would like additional information, please open a support ticket and submit it through your OpenAir account.

To open a support ticket:

1. Log in to your OpenAir account.
2. Go to Support. It is a menu option on the bottom of the main drop-down list.
3. Click the link to Create a support ticket.

    Contact Customer Care form displays in a new browser window with your Company Name.

4. Type the requested information and click Submit.

> **(i) Note:** An asterisk * displays after required fields.

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

Error Codes

HTTP 413 error - can be thrown for accounts with a lot of data. To resolve, contact your Blackberry Enterprise server administrator and ask them to adjust the BES "Maximum number of kilobytes per connection" parameter on the server to at least 1024kb or higher. You may have to re-install the Blackberry client so that it populates the full set of data after this setting is changed.

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