OpenAir

User Guide

April 14, 2018

ORACLE NETSUITE

Table of Contents

Introducing OpenAir 1
- Navigation 3
- User Center 4
- View Button 4
- Sidebar 5
- Canvas 6
- List View 7
- Form 10
- Home / Dashboard 14
- Calendars 18
- Reports 19
- Report Management and Report Editor 20
  - Creating a New Report 25
  - Editing Reports in the Report Editor 27
- Grids 29

Personal Settings 32
- General 32
- Optional Features 32
- Time Settings 33
- Regional Settings 33
- Print Settings 34
- Page Layout 34
- Dashboard Options 34
- Timesheet Options 35
- Expenses Options 36
- Invoices Options 37
- Projects Options 37
- Scripting Studio Options 38
- Display Options 40

References 49
- Terminology 49
- Icons 49

Introducing OpenAir

Overview

Welcome to OpenAir!

This guide will take you through the OpenAir product and how to use its interface and features.

Login

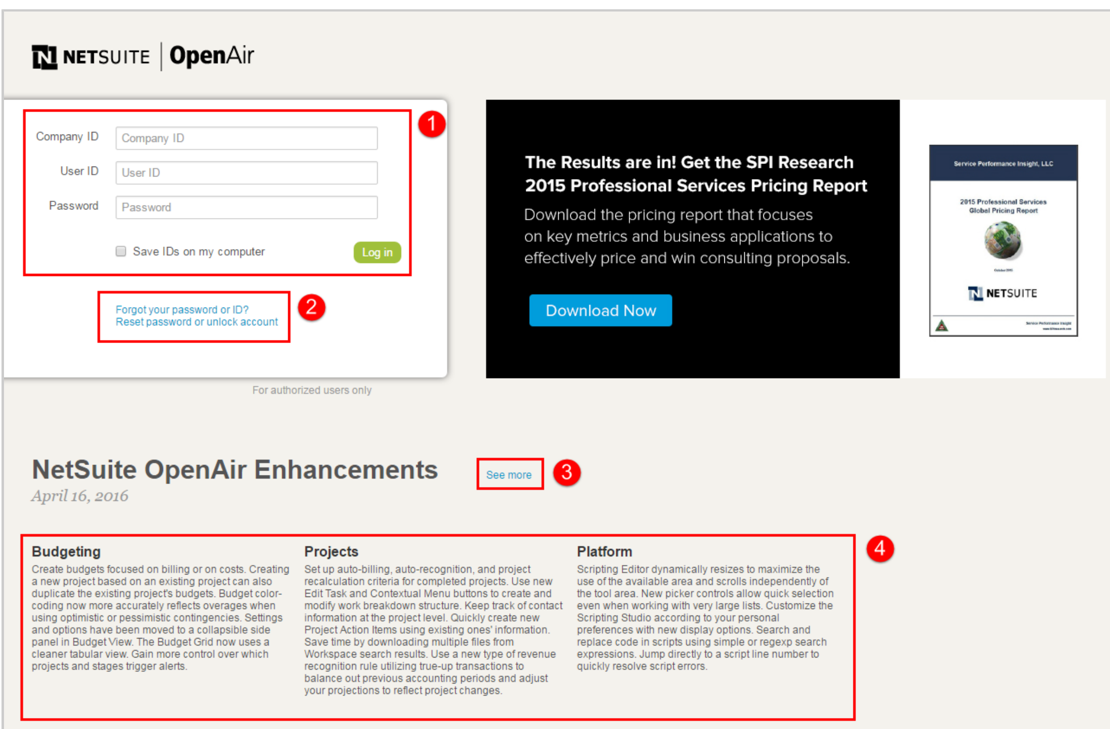
The first step in using OpenAir is to navigate to its website at:

https://www.openair.com/index.pl

This page is the OpenAir login screen, where you enter your company and user credentials and start using OpenAir.

The login screen contains several different elements:

1. Login fields — Enter your OpenAir Company ID, User ID, and Password here. You can click “Save IDs on my computer” and OpenAir will autofill your Company ID and UserID the next time you open the page. Click **Log in** to log into OpenAir with your credentials.
2. Access solutions — Use these links to get help if you’ve forgotten your Company ID, User ID, or Password. You can also reset your password or unlock your account.
3. Release notes — Click the “See more” link to access the latest OpenAir release notes. Here you can find all of the latest changes to the OpenAir application. Release notes are issued/updated with every major release.
4. Release highlights — Here you can find highlights of the latest release features. See the Release notes for more detailed information.



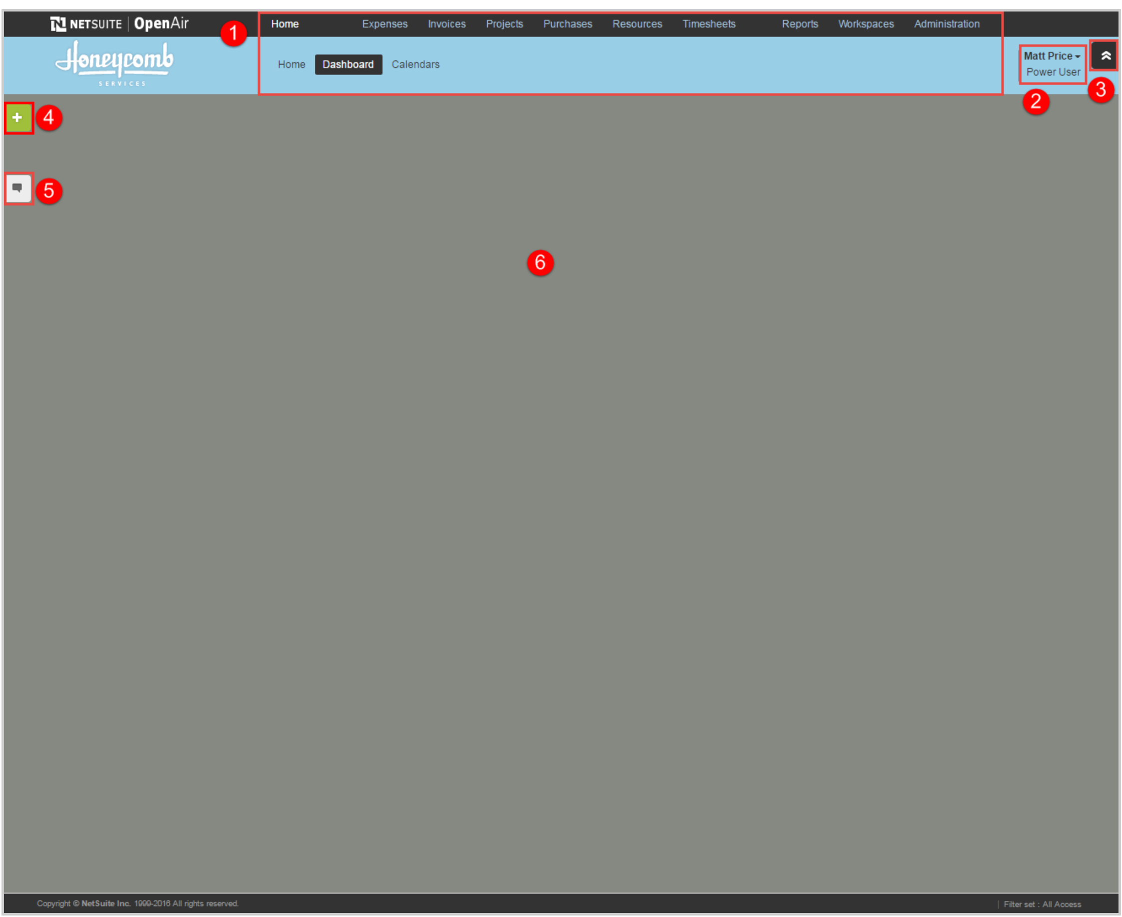
NetSuite OpenAir's user interface has been designed for clarity and ease of use, leveraging modern controls and responsive design principles. The result is a superior user experience, where you gain more control over your data and require less effort to get your work done.

Common Features

A number of key features are always available regardless of the screen you are currently working in. These features are context sensitive and adapt accordingly.

The following features provide quick access to the NetSuite OpenAir functionality:

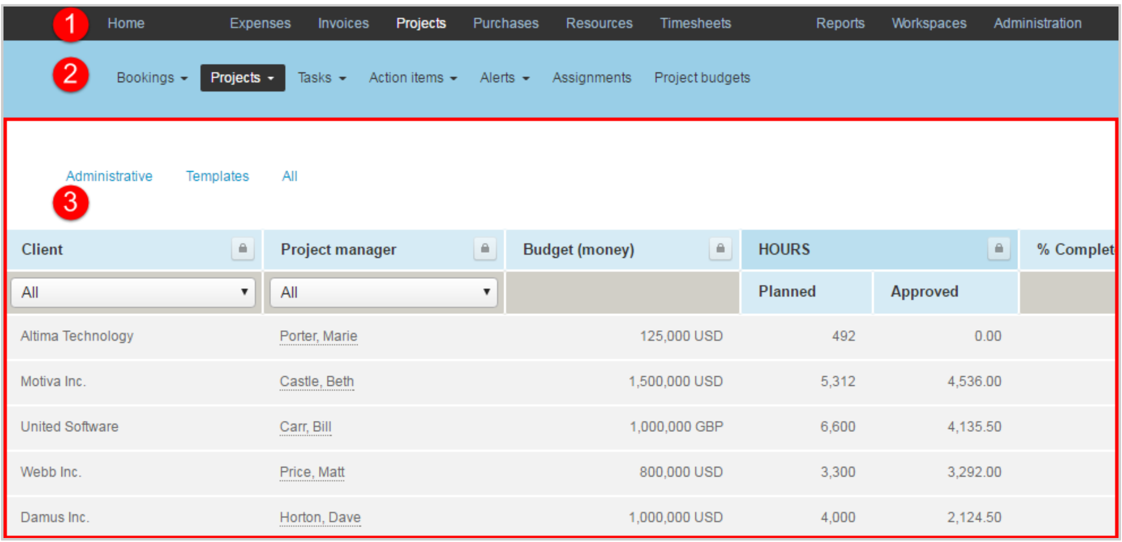
1. Navigation — Three tier responsive menu gets you where you need to go. See also Form Navigation and Pagination.
2. User Center — Draws together all user access and preference features into a common area.
3. View Button — Allows you to swap quickly between the Standard and Full view. The Full view hides the Navigation, User Center and the footer to maximize the screen area available to display the content.
4. The Create Button draws together all the OpenAir content creation actions into a common area.
5. The Tips Button moves all the OpenAir tips into a more convenient location.
6. Canvas — Displays business data, organized into various visual forms for easy and convenient use.The Canvas is the display area for the various screens i.e. Form, List View, Grids, Reports, etc.



Navigation

Navigation is divided into three main levels.

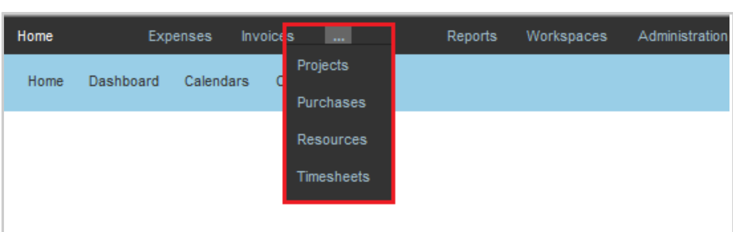
1. **Main navigation** — The top menu bar allows users to navigate between the available modules. Notice the use of spacing to logically group the modules.
2. **In-Module navigation** — The second menu bar allows users to navigate through the functionality provided by the module.
3. **Screen specific** — The third level of navigation is specific to the selected screen and may contain one or more level of tabs with supporting controls.



Navigation can be hidden by the View Button.

Continuation Menu

If there is not sufficient space to display the full menu bar then a continuation **...** drop down menu is displayed.



Navigation Controls

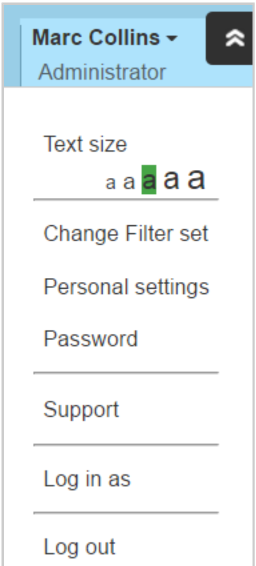
See also:

- Form Navigation — Allows you to quickly navigate around a large Form.

- Pagination — Allows you to quickly navigate within a large List View.

User Center

The User Center draws together all OpenAir user features into a common area.



The User Center displays the user name and role.

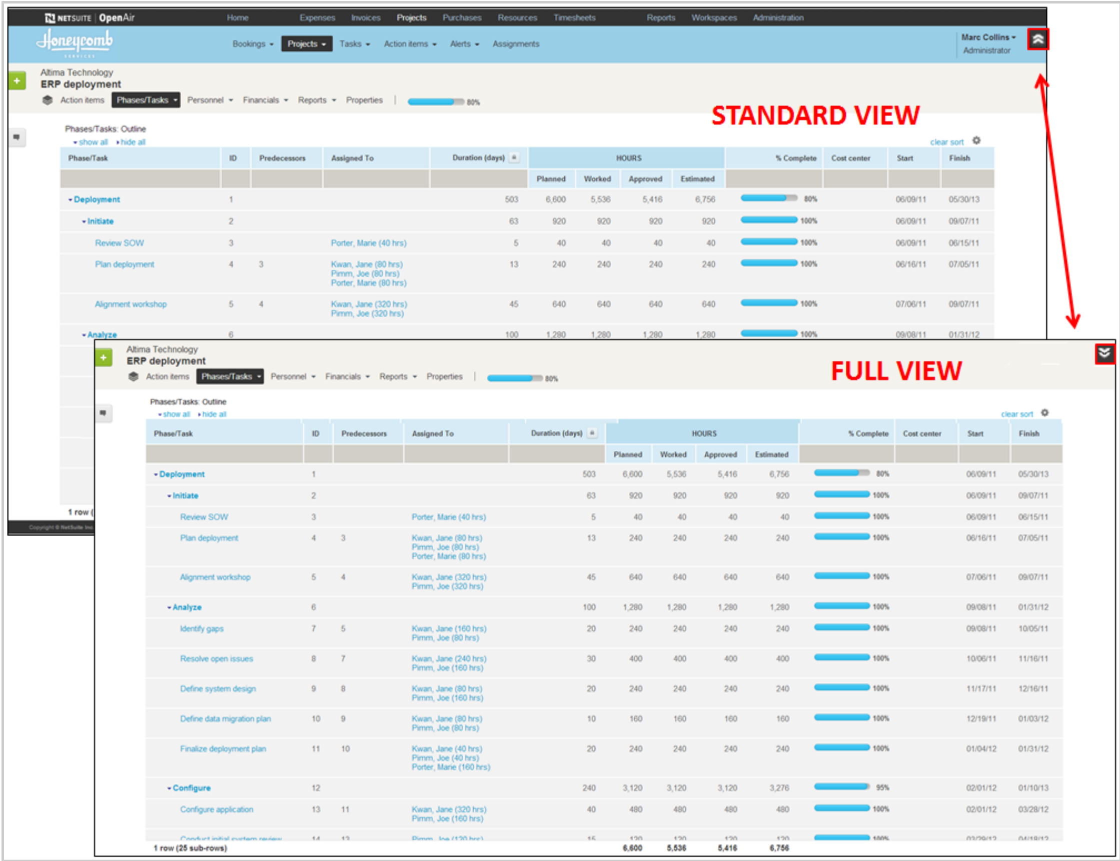
Point to the User Center to access the User Center menu.

- **Text size** — Visual tool to set the text size used in the screens.
- **Personal settings** — Displays the screen to configure personal settings and optional features. See the chapter on Personal Settings for more information.
- **Change Filter set** — If you have multiple filters sets available, you will have the option to change your current filter set.
- **Password** — Displays the screen to change password and provide password hint.
- **Help** — Displays the old OpenAir help.
- **Support** — Displays the support screen where users can access SuiteAnswers, access the User Forum and view guides.
- **Log in as** — Log in or proxy in as another user.
- **Log out** — Log out and cancel your session.

The User Center can be hidden by the View Button.

View Button

The View button allows you to quickly swap between Standard and Full views.



The Full view hides the Navigation, User Center and the footer to maximize the screen area available to display the content.

Sidebar

The Sidebar provides quick access to the most frequently used features.

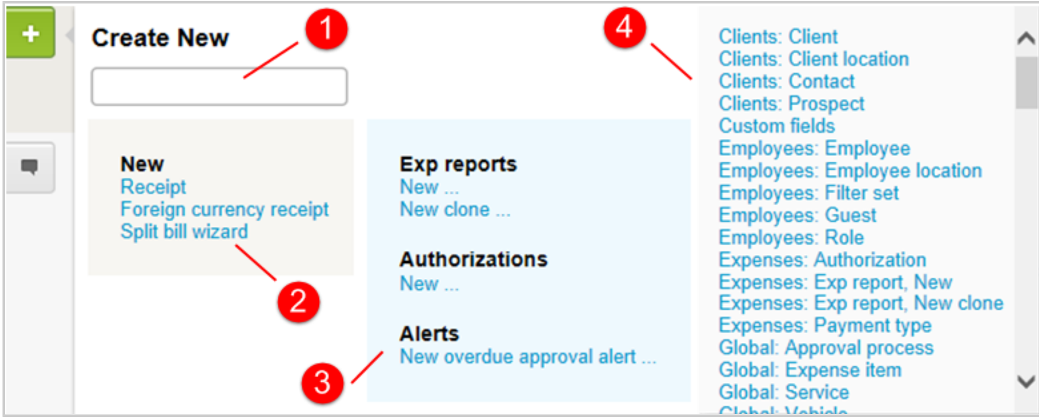
The Sidebar typically contains:

- Create Button
- Tips Button

Create Button

The Create button draws together all the OpenAir content creation actions into a common area.

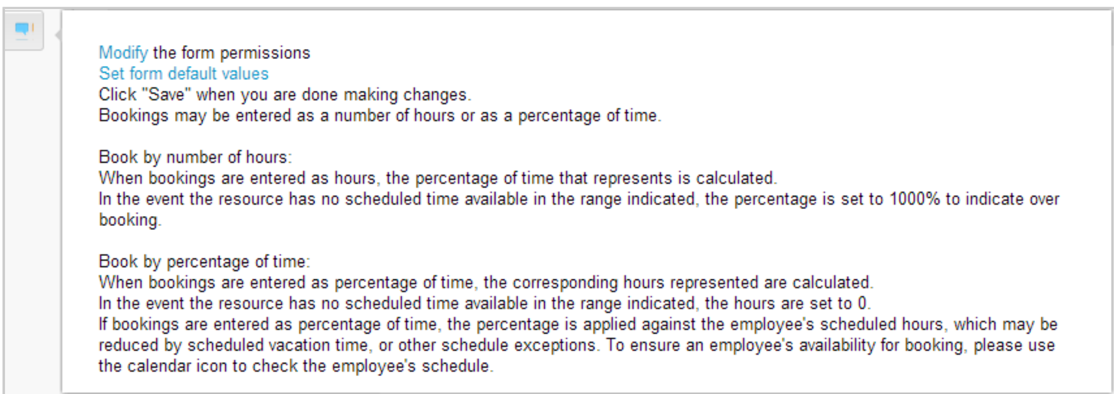
1. **Search** — Search is used to located a specific global create action. As you enter search text the **Global create list** is filtered instantly.
2. **Screen specific** — List all create actions available for the current screen.
3. **Module specific** — List all create actions available for the current module.
4. **Global create list** — List all create actions from global settings.



The Create button is context sensitive. Click the button to display the Create New menu.

Tips Button

The Tips button contains OpenAir tips in a convenient location.



The Tips button contains information relevant to the screen or module you are in, and also contains special actions available to your role.

Canvas

The canvas displays business data organized into various visual forms for easy and convenient use.

Depending on the context and purpose, information is organized into Lists, Charts, or Worksheets for a “Big Picture” perspective and convenient access to data.

Data items, such as Projects, Timesheets or Expense Envelopes, each have their own navigation to give deeper and more precise control over the data configuration. This may be displayed as Forms, Lists, or Grids (Worksheets).

The Home and Dashboard board screens combine useful information into clear and interactive portlets. These may include messages, reminders, overviews, and repositories of files or analytic data, presented as colorful graphs.

Calendars provide support for the main modules, such as the Resource Management module by displaying various types of data in a useful color-coded form.

The canvas can contain the following screen types:

- List View
- Form
- Home / Dashboard
- Calendars

List View

The List View presents bulk data in a linear way, providing a variety of helpful tools for productive work.

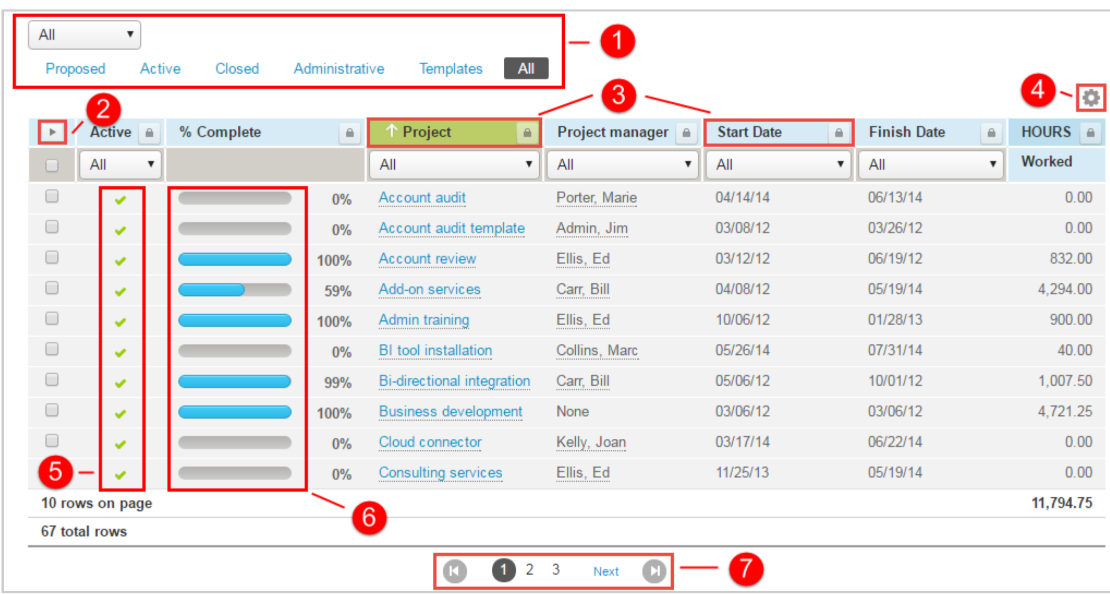
Most List Views include a "Display/Toolbar Bar", which consist of various column configuration tabs, filtering options and other useful tools.

List Options combine visual display settings, content configuration and data export options. Selected rows, sorted and filtered columns are clearly highlighted in bright and positive colors.

Rows containing total values are always displayed on the screen, without the need to scroll or otherwise locate them.

OpenAir includes a variety of useful illustrative ways to display various aspects and qualities of data, such as the Progress Bar and Active Tick to indicate the project status at a glance.

1. Screen-specific navigation
2. Run bulk actions
3. Row Header colors
4. List Options
5. “Active” tick
6. Progress bar
7. Pagination



Note: The ▸ icon is used for **Run bulk actions** and the Cog icon is used for **List options**.

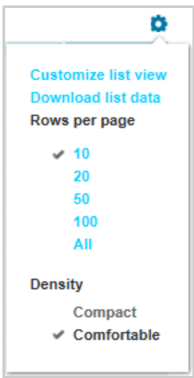
Features:

- Screen specific navigation

- Run bulk actions button
- Row header colors
- List Options with new Density setting.
- Active Tick
- Progress Bar
- Pagination

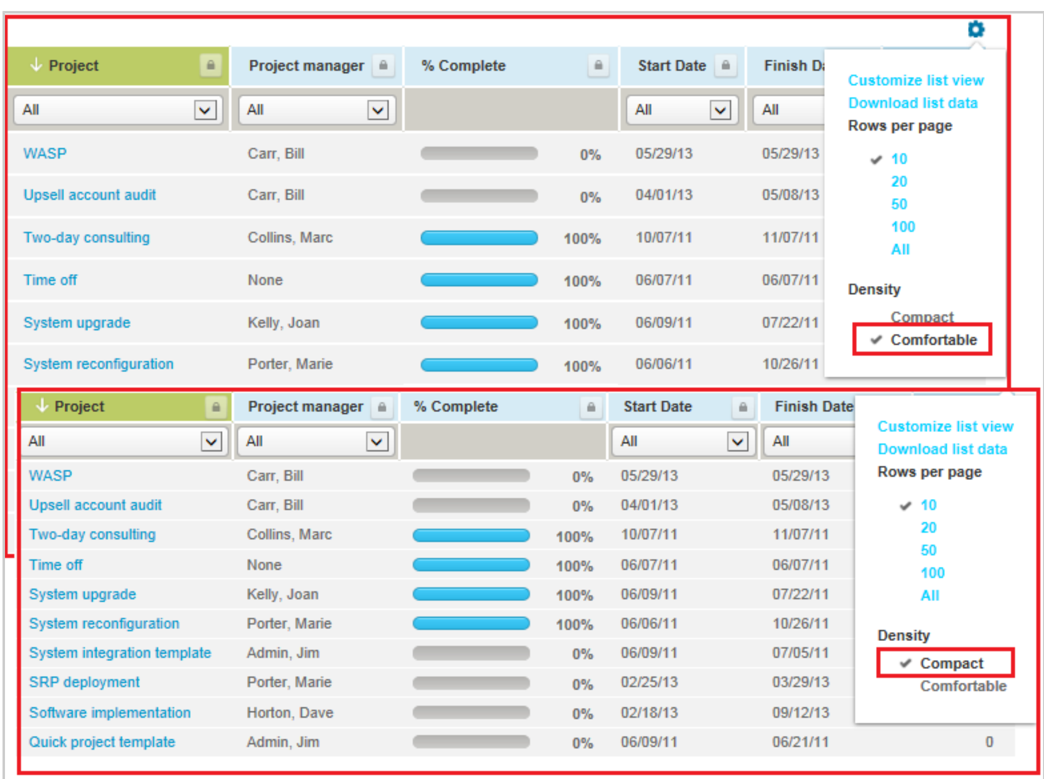
List Options

The List options button pulls together the previous **List Menu** and **Rows per page** features and has been moved to a more prominent position.



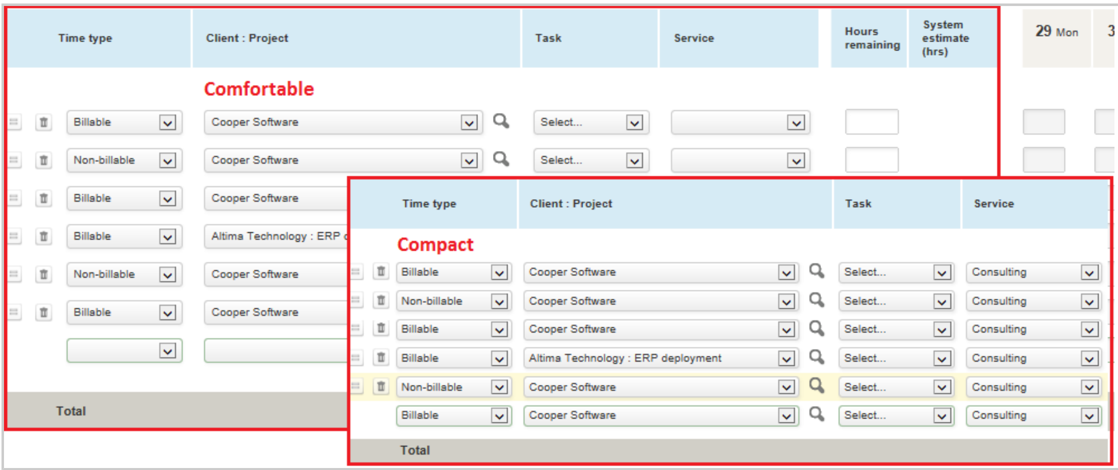
Density

List Views



Select comfortable or compact from the List Options menu to control the density of the data displayed in list views. In compact mode the margins are trimmed and headings wrap to make more data visible.

Timesheets



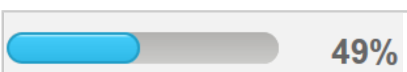
Timesheet grid density is set from User Center > Personal Settings > Display Options > Data Density > Control the data density displayed in timesheet grid with selected mode.

Active Tick

The Active tick provides a clear positive indication of an active item.

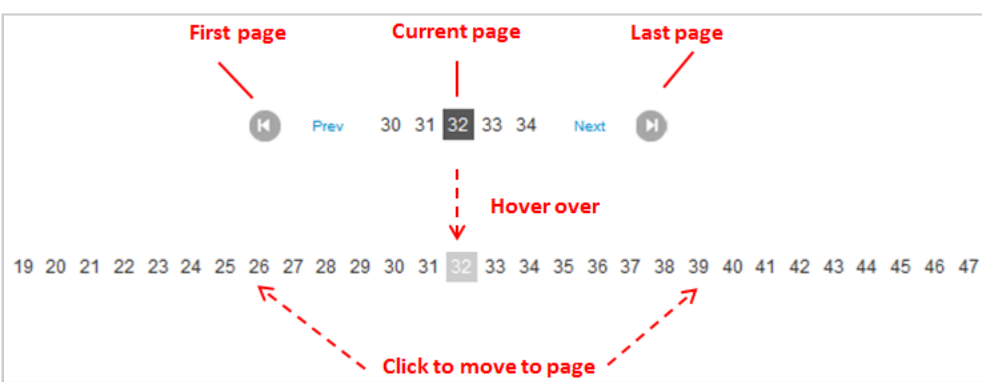
Progress Bar

The Progress bar combines a quick visual indication of completed status together with the numerical value.



Pagination

The Pagination control is provided in the List View to allow you to quickly move to the item you need regardless of the size of the list.



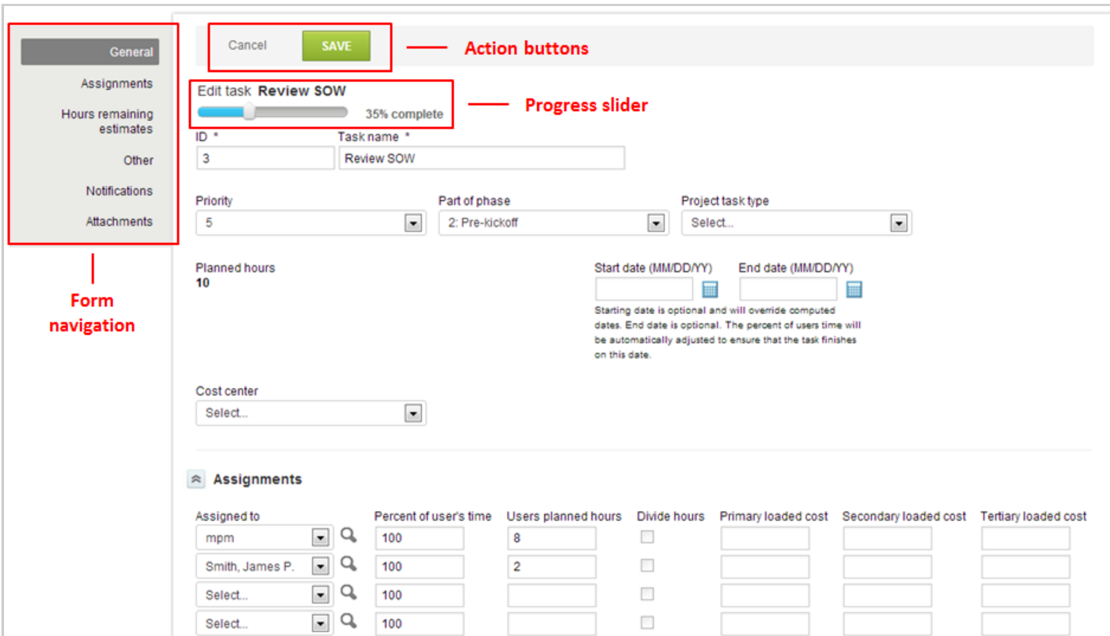
From the control you can clearly see your position in the list and move through the pages. Hover your mouse over the control and click to jump to a specific page.

Form

Forms present editable data clearly.

Forms have a 2 column layout, collapsible sections, and input fields to provide a positive and satisfying user experience.

Form Navigation provides users with a quick and convenient way to navigate between form sections, which is especially important for editing complex data items, such as Projects. The currently displayed section is clearly highlighted and adjusts automatically when the form is scrolled.



Features:

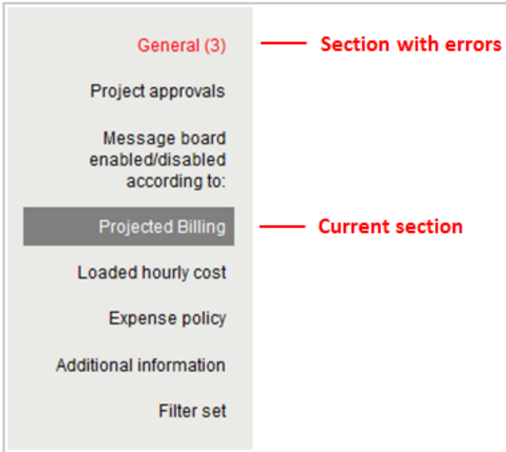
- Form Navigation — Allows you to quickly navigate large forms.
- Form Signposting — Helps you keep your bearings when navigating complex forms.
- Action buttons — Buttons are generally green throughout the application, and the green color indicates that they save data to the server. Blue buttons perform in-page functions which do not save data on the server. Cancel and Delete buttons are exceptions and are show as text.
- Task Progress slider — Allows you to quickly view the current progress.

  > **Note:** If enabled in your account, the slider also allows you to set the progress.

- On-Screen Error Messages — New on-screen error reporting features help you to quickly located and correct input errors.
- In-Form Notifications — Helps you to quickly find and resolve data entry issues.
- In-Form Popups — Enjoy the full functionality of NetSuite OpenAir without the need for popup windows.

Form Navigation

Form navigation is a Form control that allows you to quickly navigate around large forms.



Note: Form Navigation does not display if the form only includes a General section.

Form navigation features:

- **Section list** — The bar displays the list of sections the form is divided into.

  Note: Clicking on a section will take you directly to the relevant part of the form.

- **Section indicator** — The section you are currently viewing is highlighted in gray.

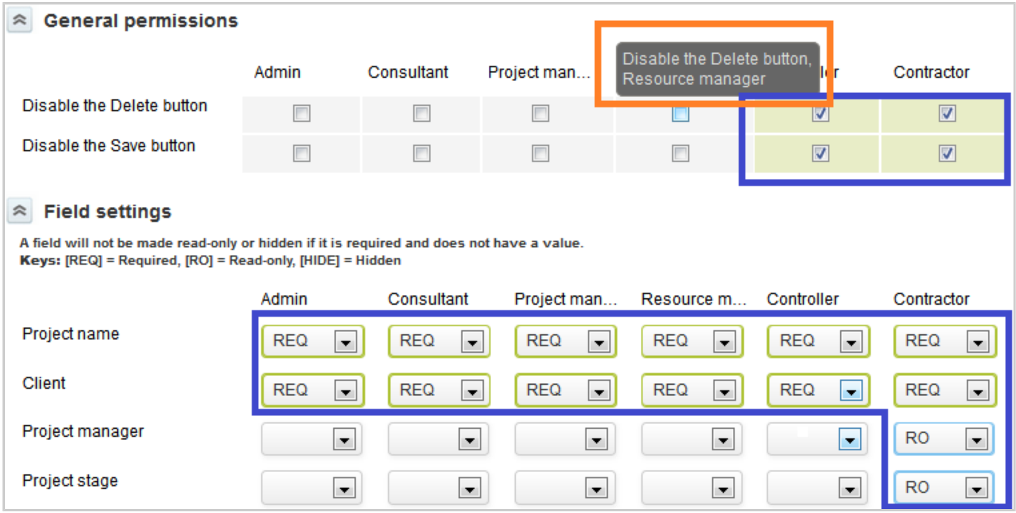
  Note: As you scroll through a form the Section indicator changes instantly.

- **Section errors** — If you attempt to save an incomplete form red text is used to indicate sections with errors together with a count of the number of errors.

  Note: One missing field will be reported as more than one error if it breaks more than one rule. For example, not selecting a client can generate the 'Required field' and 'Please select a client' errors.

Form Signposting

Form signposting uses info tips and color highlighting to help you to keep your bearings when navigating complex forms.

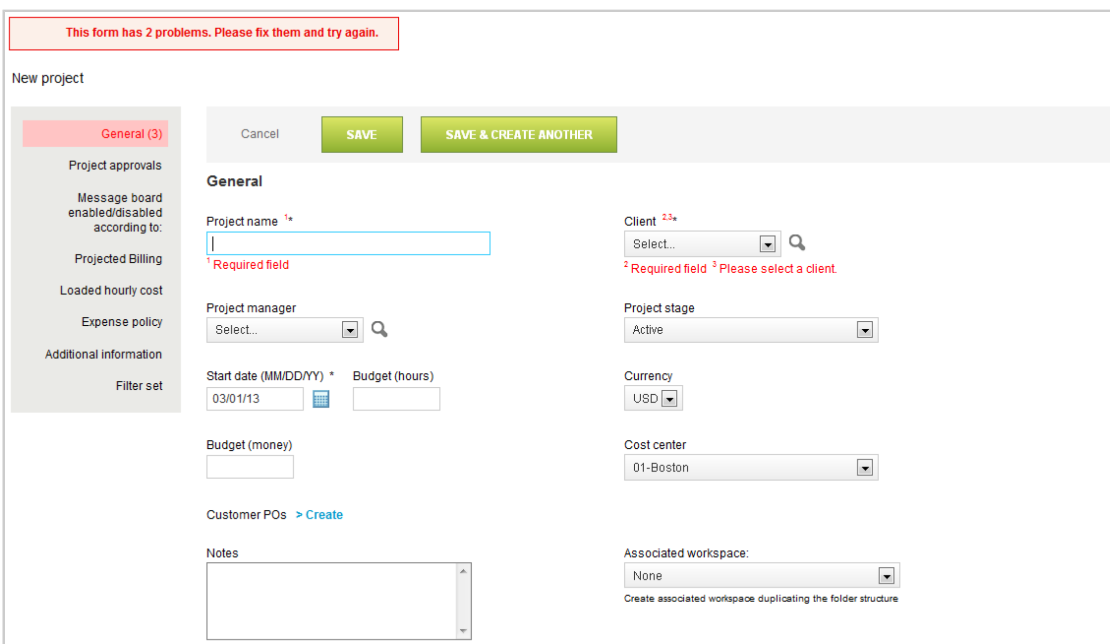


The orange box in the above screenshot shows an info tip. An info tip is displayed when you hover your mouse over a control. This allows you to positively confirm the selection.

The blue boxes show the use of color to highlight the selections that have been made. This color coding makes it easier for you to verify that the correct settings have been made.

Note: For this release, form signposting has only been applied to the 'Modify the form permissions' screens.

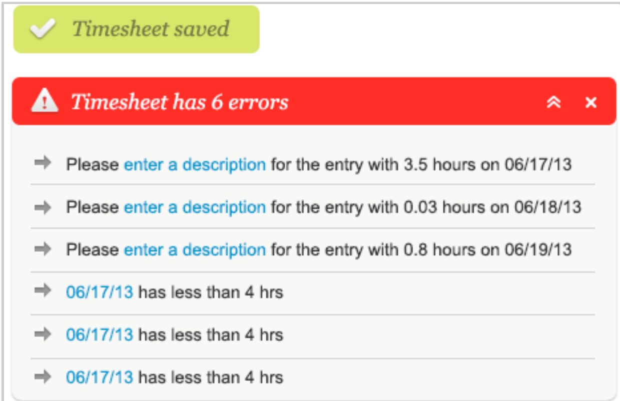
On-Screen Error Messages



The Form Navigation control and on-screen error messages help to you quickly located and correct errors messages.

If problems are encountered, the form will automatically take you to the first error. The Form Navigation control shows you the number of errors in each section. The on-screen error messages explain how to correct the errors.

In-Form Notifications



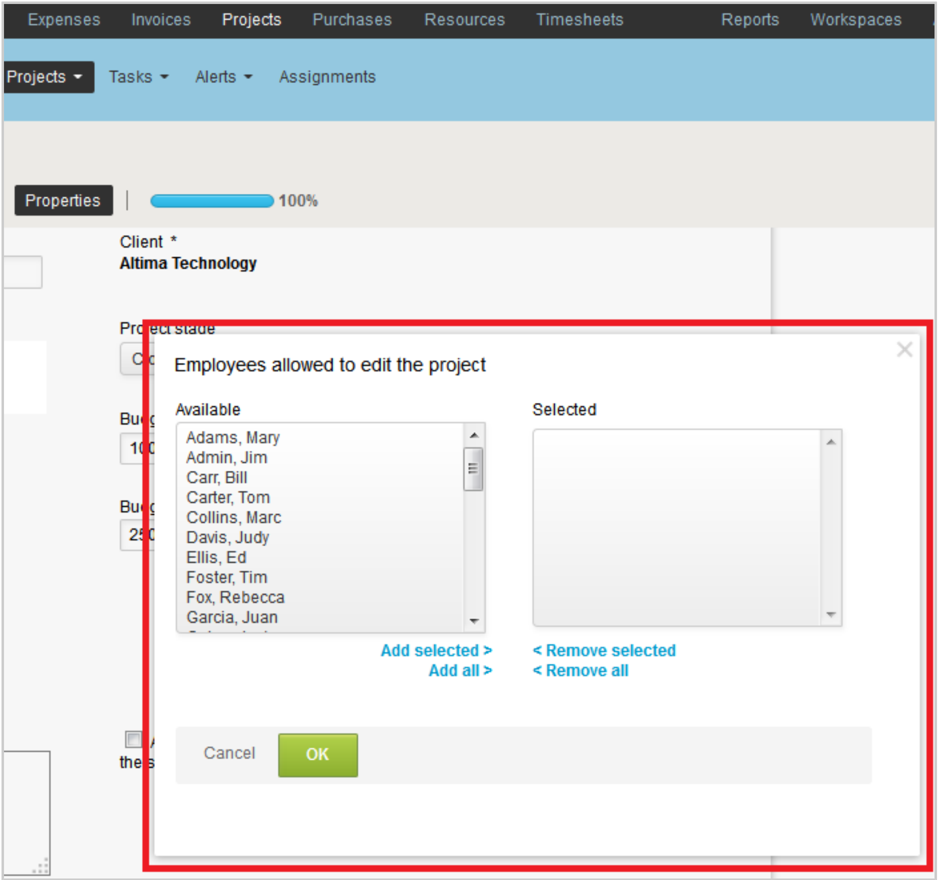
In-Form notifications provide clear feedback on user actions without the need for popup windows. They are particularly valuable for correcting data input errors. Errors are reported in a list with clickable links and instructions. Click on the links to be taken directly to the source of the error.

Note: For this release, in-form notifications are only available for the timesheet grid.

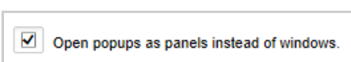
In-Form Popups

In-Form popups have all the advantages of conventional popup windows, but appear as part of the form.

This allows you to block popup windows and still use all the OpenAir functionality.

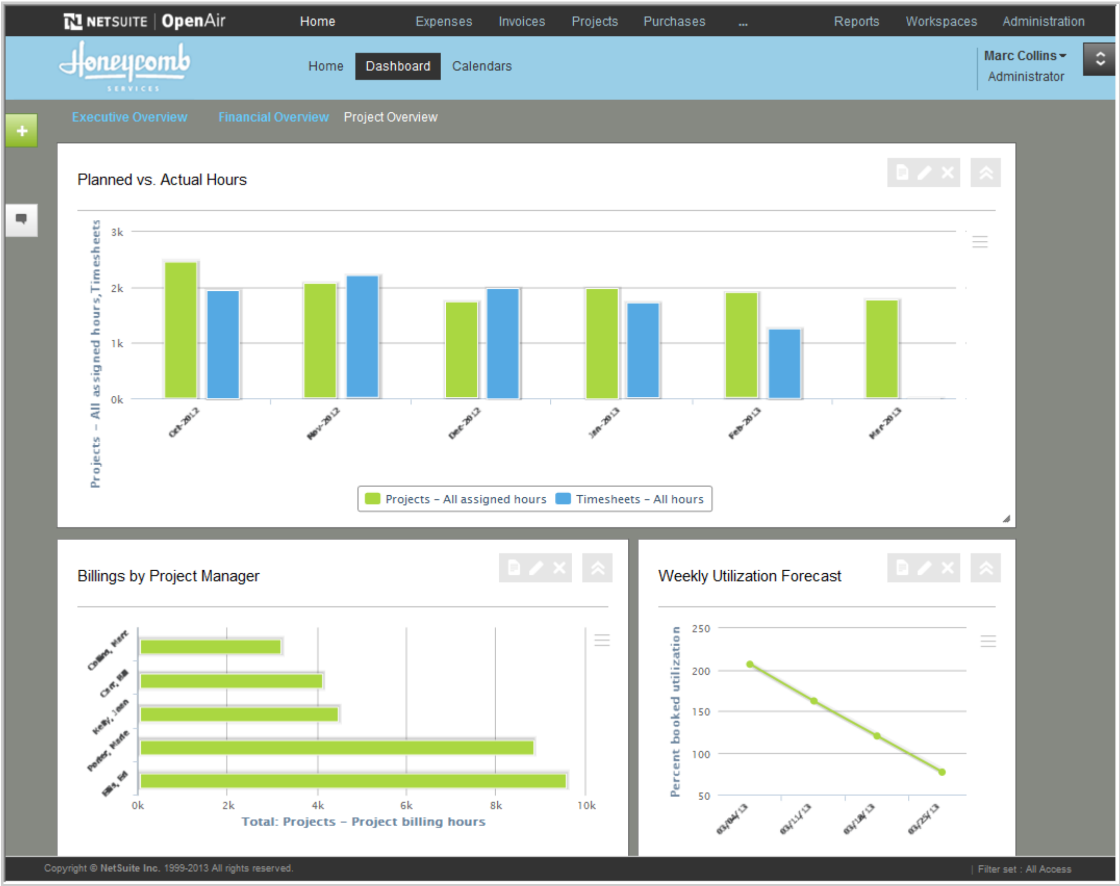


The new option is enabled from **Personal Settings > Display Options**.



Home / Dashboard

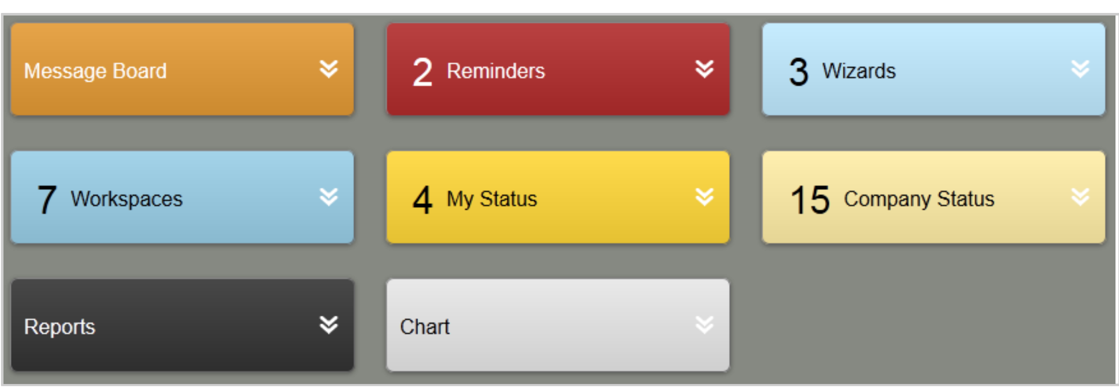
The content of the home page and dashboard is organized into portlets that can be collapsed, expanded, resized, and moved. Portlets are screen width responsive.



This example shows three chart portlets. You can interact with the charts, e.g. hiding a series by clicking on the legend or hovering over a point to display detailed information in a tooltip. You can also download the chart as an image.

Portlet

The Home and Dashboard screens are organized as a set of portlets. Each portlet type is color coded and can be moved and resized according to your needs. You will find all of the familiar OpenAir Dashboard functionality encapsulated within these portlets.



Portlet features:

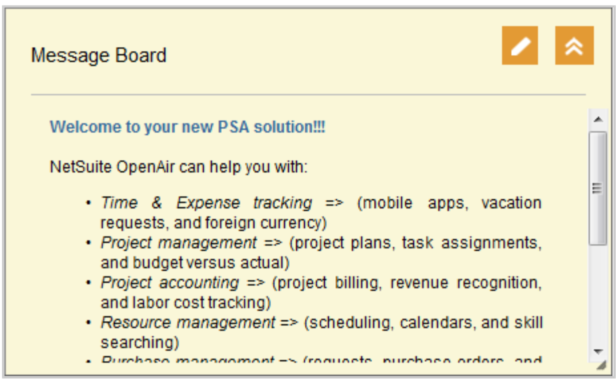
- Portlets have a title that displays in the center when the portlet is collapsed and at the top when the portlet is expanded.

> **Note:** When collapsed the number of items in the portlet is displayed on the left.

- Portlets can be moved by dragging the portlet title. To keep a pleasing appearance, portlets automatically align to a grid.

> **Note:** The Message Board portlet is always shown first and cannot be moved from the top left position on the Dashboard.

- Portlets can be collapsed or expanded by clicking on the / Icons or by single clicking on the portlet title.
- When expanded, portlets have action buttons displayed in the top right depending on the portlet type. An action hint is displayed if you hover your mouse over the button.



If the content does not fit within the portlet area, then the content will either automatically resize or scrollbars will be displayed.

Chart

Colorful and interactive graphs create offer a productive and in-depth way to work with performance metrics.

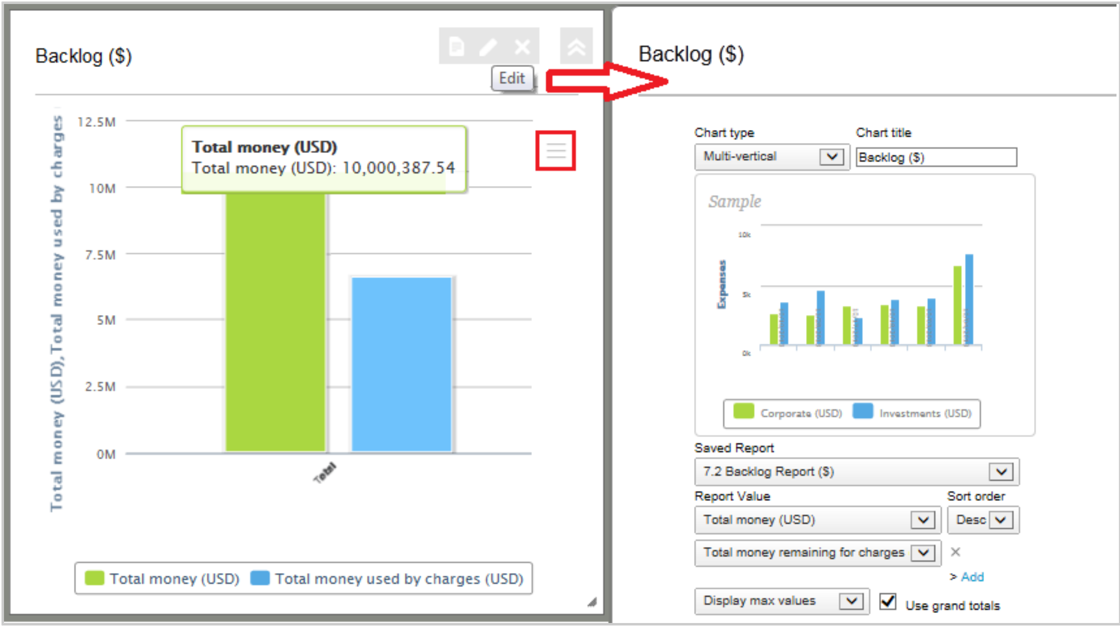
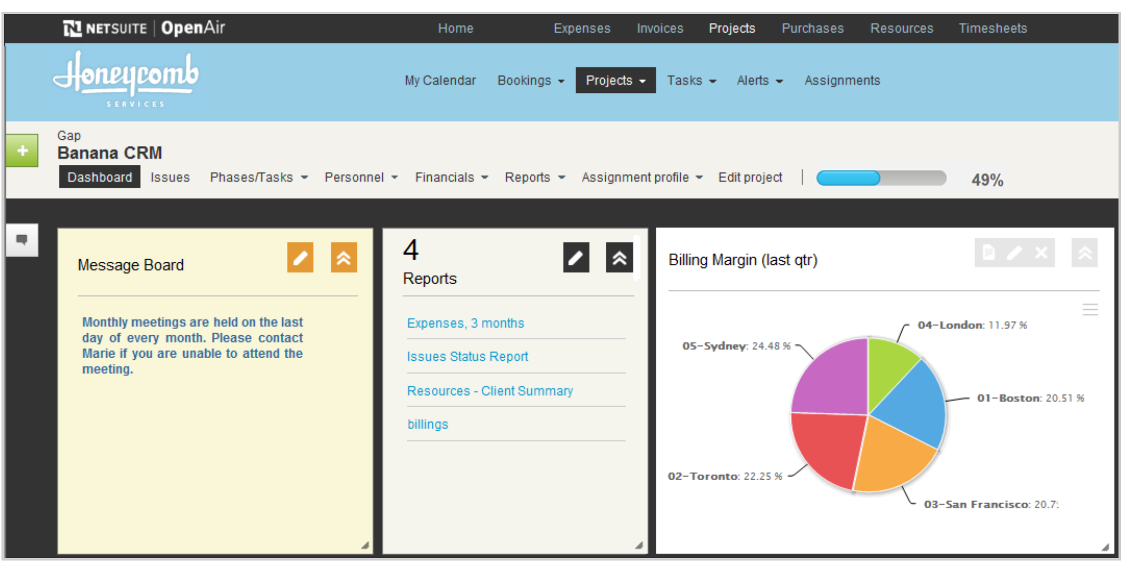


Chart features:

- **Dynamic** — You can directly interact with the charts by simply clicking on them. For example, you can hide a series by clicking on the series in the legend.
- **Tooltip Labels** — Point to a chart to display a tooltip with information on each point and series. The tooltip follows as the user moves the mouse over the graph, and great efforts have been taken to make it stick to the nearest point as well as making it easy to read a point that is below another point.
- **Export Chart** — You can export the chart as an image by clicking on the icon.
- **Chart Preview** — You can see a preview of the chart type when editing the Chart Portlet.
- **Chart Types** — The following new chart types are available in OpenAir: Donut, Area Spline, Stack Area, and horizontal / vertical stacked-bar.

Project Dashboard

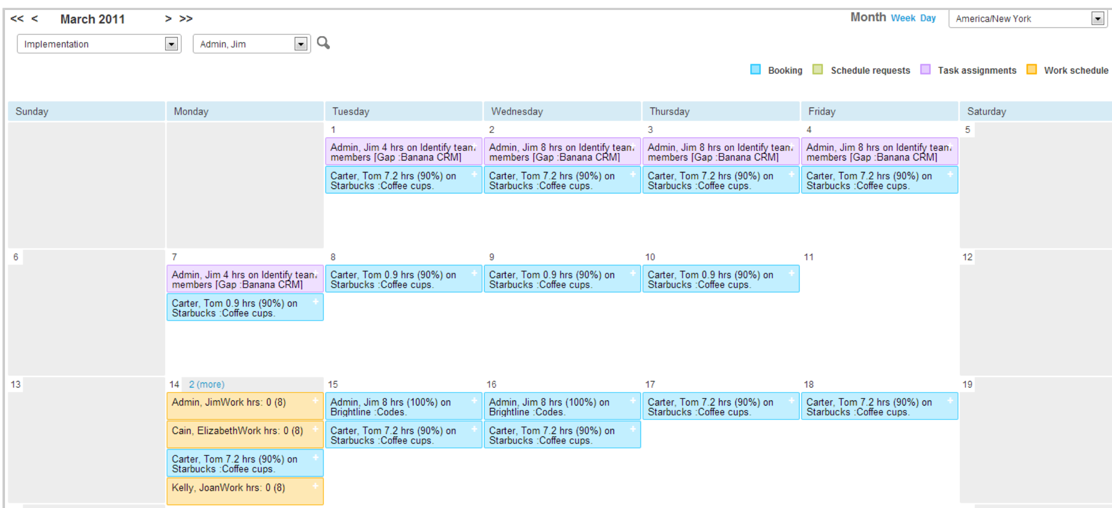


The Project Dashboard gives a visual analysis of a specific project and is useful for visually comparing projects.

Note: All items displayed on the Project Dashboard are filtered by the specific project. Only saved reports with the "Make this report available in project-specific situations" option selected are shown in the Reports portlet and available to create Charts.

Calendars

In the Calendar, information is presented in a modern, visual way, color-coded by type. A multi-level filtering system allows users to create various data configurations depending on their needs. You can always find your calendar by going to Home > Calendars. You can also add a My Calendar tab to other modules' in-module navigation (please see Customizing the Calendar below).



Calendar features:

- **Colors** — Calendar items are color-coded for ease of identification.
- **Item Count** — A count is displayed of items not visible in each calendar cell.
- Clicking on a specific number of the day in the calendar opens a list of events for that day by type, along with a summary, details, and notes. Clicking an entry under **Summary** opens a window with more details about that entry.

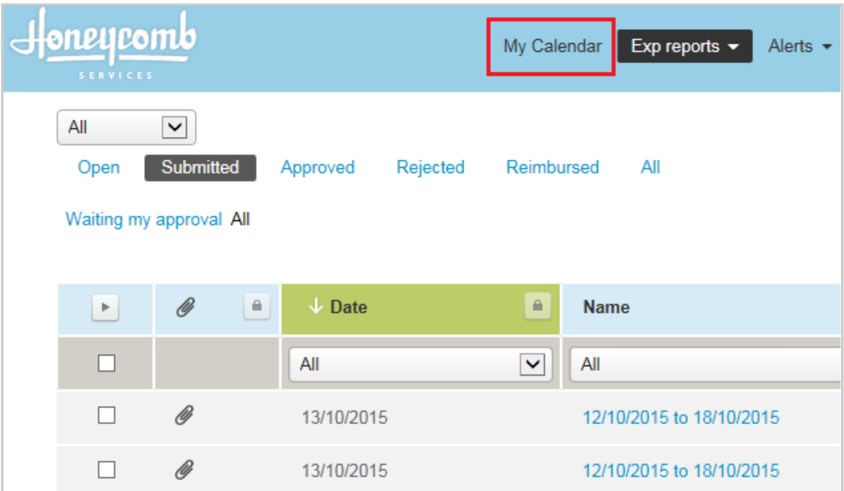
Customizing the Calendar

The calendar and the information it displays can be customized by going to Administration > Global Settings > Display > Interface: Display. The following options all affect the Calendar's availability in various modules:

- **Hide the 'My Calendar' tab** — hides the My Calendar tab across the account. This setting is mutually exclusive with **Show 'My Calendar' tab in all modules.** If both are selected, the My Calendar tab will be hidden.
- **Maximum number of rows to display per day in 'My Calendar' monthly view** — controls how many rows are displayed for each day in the monthly calendar view. The default (and minimum) is

4 rows, and can be increased up to 10. The option to display all rows regardless of number is also available.

- Show 'My Calendar' tab in all modules. — shows the My Calendar tab to the in-module navigation in all modules. This setting is mutually exclusive with **Show 'My Calendar' tab in all modules.** If both are selected, the My Calendar tab will be hidden.

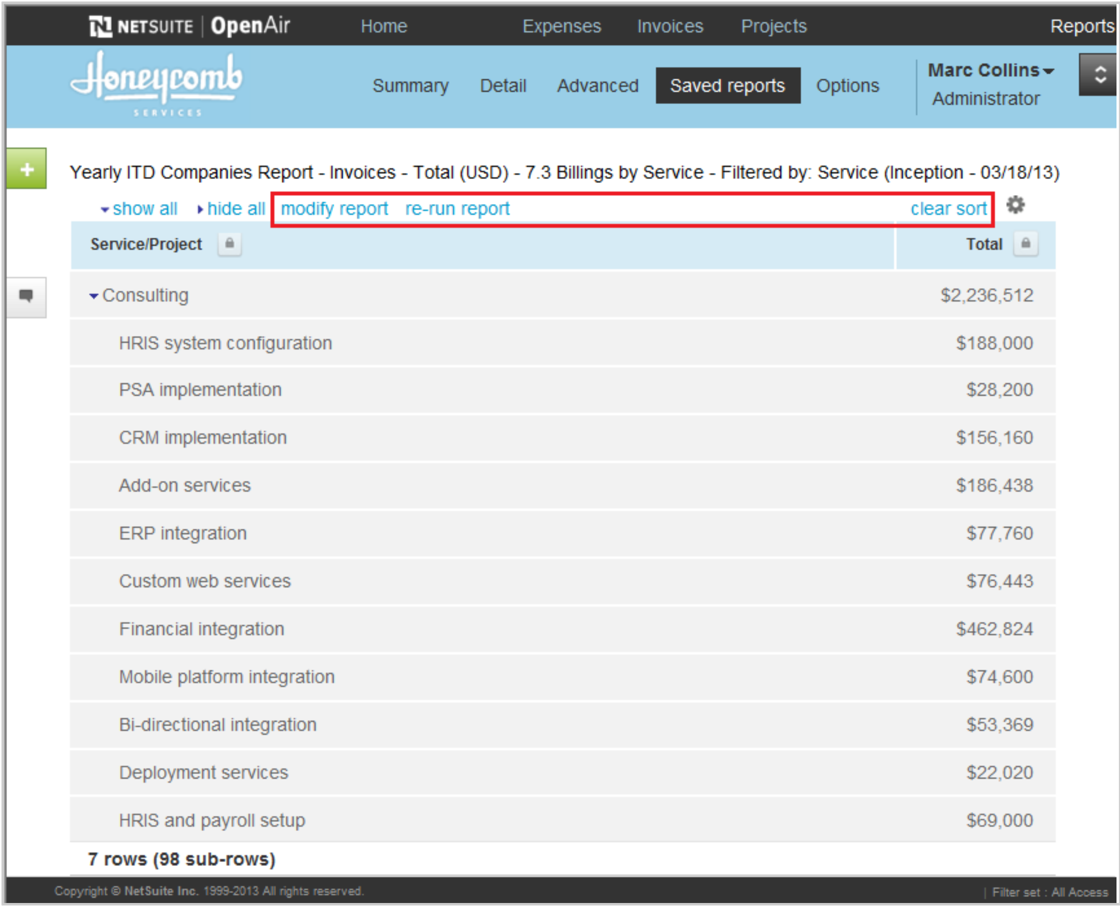


The following options affect the information which appears on each calendar item in the calendar display and in the **Summary** or **Detail** fields in the list of events.

- Show booking type for bookings as summary on the calendar — shows booking type information in the calendar.
- Show custom fields for bookings as summary on the calendar — shows active booking custom fields in the calendar and summary.
- Show custom fields for bookings as detail on the calendar — shows active booking custom fields in the calendar and detail.
- Show custom fields for task assignments as summary on the calendar — shows active task custom fields in the calendar and summary.
- Show custom fields for task assignments as detail on the calendar — shows active task custom fields in the calendar and detail.

Reports

Reports take their design from the List View.

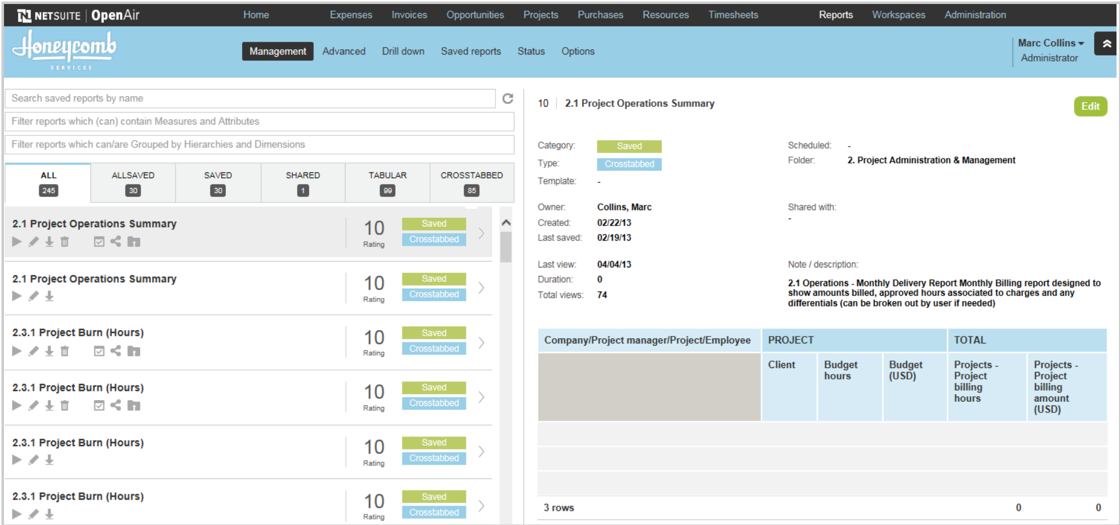


Reporting controls can be found in the header.

Report Management and Report Editor

The Report Management and Report Editor features streamline the process for finding, editing, and creating reports. For a quick overview of their functionality, please see the OpenAir Report Management and Editor Quick Reference.

To enable this feature, please have your Administrator contact OpenAir Support and request the **Show the 'Enable Report Management and Editor Interface.' Option in Employee demographics** switch. Administrators can then navigate to Administration > Global Settings > Employee/Users > [select a specific user] > Reporting Options and check the **Enable the report management and editor interface** option for each user or can use the Bulk Employee/User change wizard to enable the feature for multiple users at one time.

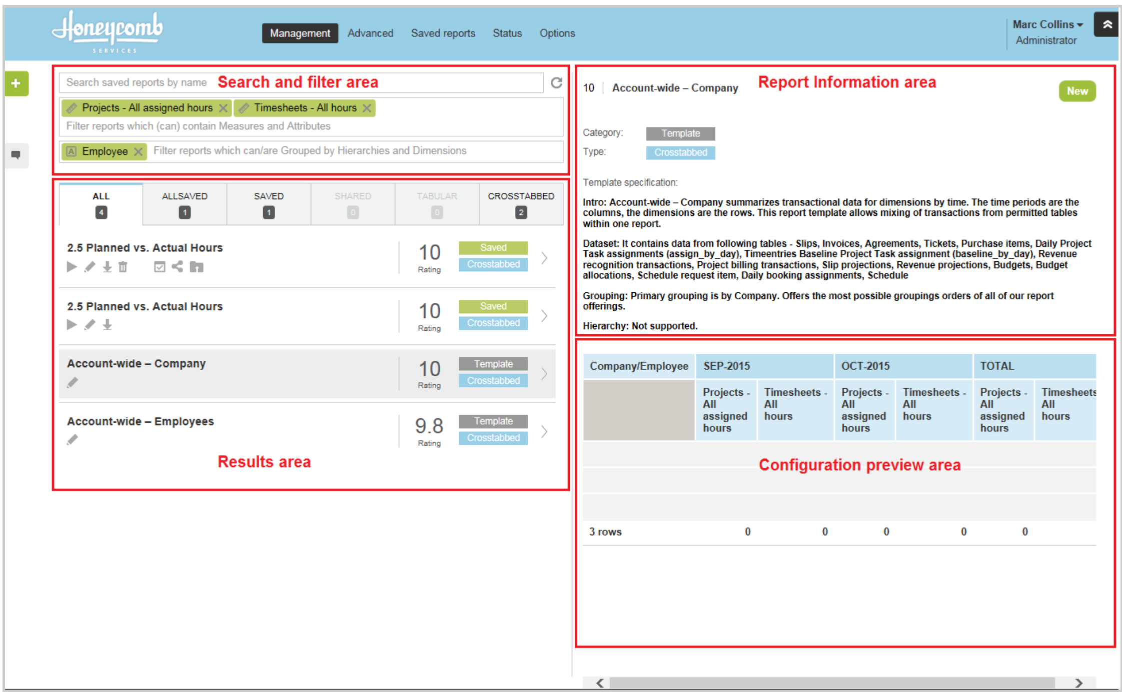


Reporting Workflow in the Report Management and Editor

The report editor and management features introduce a more efficient workflow. Searching or filtering reports in Report management brings up a list of rated results, as well as a preview of the report format, all within the same screen. Clicking **New** (if selecting a template) or **Edit** (if selecting a saved report) in this interface opens the Report editor, which lets you customize the report as you see fit.

Warning: Advanced Reports are not currently supported in the Report Management or Report Editor interfaces.

Report Search and Ranking in the Report Management Interface



The Report management interface includes a number of features to quickly locate reports which fit your needs. Reports can be searched for by name and/or desired measures, attributes, dimensions, or hierarchies. Report management is located under Reports > Management.

When the Report Management interface appears, you're presented with the screen above. In the top left corner is the **Search and Filter area**, where you can search for reports by name, and also by particular measures, attributes, hierarchies, or dimensions.

Below the Search and Filter area is the **Results area**. Search results appear here, and include either tabular or crosstabbed templates or saved reports. The order of dimensions in the results matches the order of dimensions entered into the filter box.

Along the top of the Results area are tabs which organize the Results into various categories.

Note: Depending on your level of access, some tabs may not be visible.

- The **All** tab includes all results.
- The **All Saved** tab includes all results which are saved reports and in the system
- The **My Saved** tab includes only results which are your saved reports
- The **Shared** tab includes results which are reports which others have shared with you or were shared by you with others

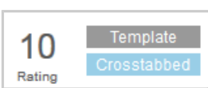
- The **Tabular** tab includes any results which are tabular report templates
- The **Crosstabbed** tab includes any results which are crosstabbed report templates

> **Note:** When you search, you are searching through all available reports; however, the Results area will only display a maximum of 100 search results.

Each result includes the saved report or report template name and buttons which, when clicked, allow the user to perform available actions such as viewing, editing, or sharing the report.

Action Icons for Reports and Templates

Icon	Description
	Run - run the report
	Edit - opens the report or template in the Report Editor
	Download - download a CSV, HTML, or PDF form of the report
	Delete - delete the report
	Schedule - schedule the report to run at periodic intervals and set up report emails
	Share - share the report with selected resources
	Report - place the report in a specified folder

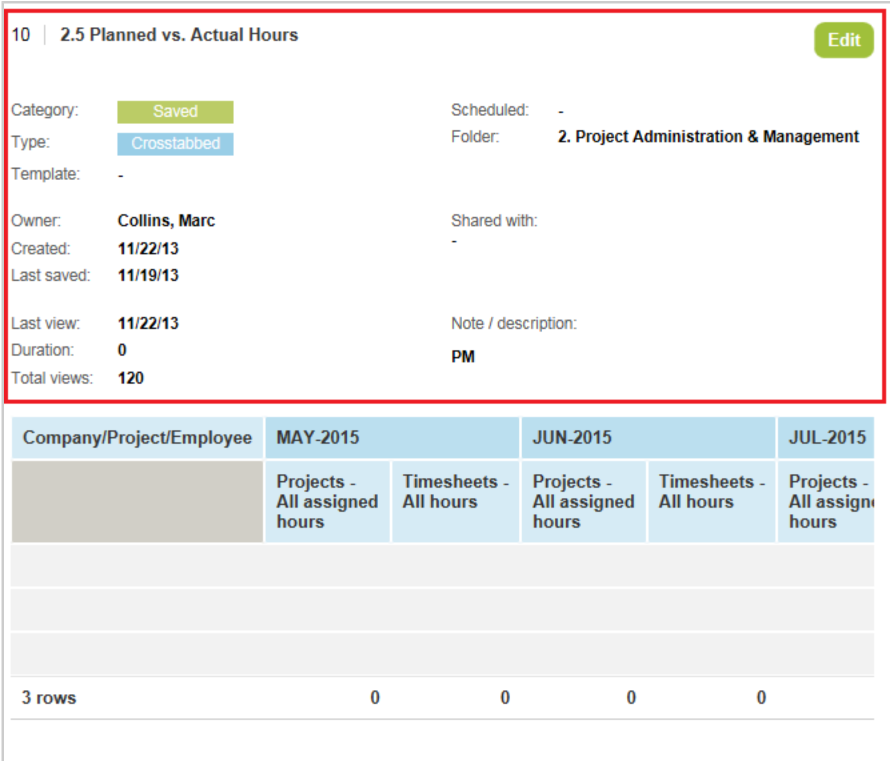


In the search results, each report template or saved report result is given a rating between 0 and 10, based on how often the template is used by all OpenAir users.

- A **10** means that the report is used very often by all OpenAir users.
- A **0** means that the report is rarely or never used by OpenAir users.

> **Note:** Saved report ratings are taken from the report template which the saved report is based on.

Clicking on a report name in the Results area opens a preview of the selected report result in the **Report information area** and **Configuration preview area.** There is no need to navigate away from the search results to see the preview.



The Report Information area gives details about the selected report.

- The **Report rating** appears in the top left corner, next to the **Report name**
- **Category** — indicates whether the result is a Saved, Template, or Shared report
- **Type** — indicates whether the result is a Tabular or Crosstabbed report
- **Template** (Saved or Shared report results only) — the name of the template the saved report is based on
- **Owner** — the owner of the report
- **Created** — the date the report was created
- **Last saved** — the date when the report was last saved
- **Last view** — the date when the report was last viewed
- **Duration** — the time it took to run this report the last time
- **Total views** — total views by everyone who has view rights for these reports
- **Scheduled** — indicates if the report is scheduled to be run at a specific time and the schedule is active
- **Folder** — indicates which folders this report is located in
- **Shared with** — indicates who this report has been shared with
- **Note / description** — note or description of the saved report
- **Template specification** (Templates only) — provides additional information about the selected template.
  - **Intro** — briefly describes the template and its layout
  - **Dataset** — indicates which tables provide data for the template
  - **Grouping** — indicates the primary grouping, and describes other potential groupings

- **Hierarchy** — indicates which hierarchies are supported, if any

Click **New** (if previewing a template) or **Edit** (if previewing a saved report) in the Report Information area to open the Report Editor. You can also open the Report Editor by clicking the pencil icon within the search results themselves.

To Schedule a Report to Run at Periodic Intervals with Report Emails

1. Navigate to Reports > Management, click the **All**, **All Saved**, or **Saved** tab, and click the **Schedule** icon for the Saved report you would like to schedule.
2. In the General section of the Schedule form, select **Run the report at the following time**, set the Day, Hour, and Minute when you would like the report to run, and select whether the report should be emailed as a PDF or CSV file.

   Note: Times are in U.S. Eastern Time.

3. In the Email options section of the Schedule form, select who you want the emailed report sent to ("Me" is selected by default). You can also email it to **All the employees who share the report**, or add additional contacts by clicking **> Create**, selecting the Contacts in the Available column, clicking **Add selected** >, and clicking **OK** when finished.
4. Enter an email address which will serve as the Sender.
5. Enter a subject for the email. "Scheduled Report: [Report Name]" is used by default.

   Note: Metavalues such as %%date%% are not supported in Scheduled Report headings or bodies.

6. Add any optional text which will appear in the email body.
7. In the Other section of the Schedule form, select **Email me additional information if the report returns no data** if you would like to receive an email even if the report returns no data.
8. Click **Save** and the report will be run and emailed (if addressees were selected) at the designated time.

Creating a New Report

Reports can be created in Report Management and Report Interface in three ways.

To create a new report (method 1):

1. Go to Reports > Management.
2. In the Report management search fields on the left, enter your desired criteria, and a template or saved report is suggested. Select the one which most closely matches your needs.
3. Click **New** (for templates) or **Edit** (for saved reports) in the upper right corner of the preview window. You will be taken to the Report editor, and your criteria will be pre-populated in the layout preview in the center of the page.
4. Drag-and-drop or click the appropriate dimensions and measures for your reports. Only Dimensions can be placed in the Rows box, and only Measures can be placed in Measure names box. The measure names container is present in the Columns box under the pre-defined Date dimension or only the Measure names box. As you place these elements, the preview window will automatically update to show you the new report layout configuration.
5. Click on Funnel icons to setup filters for dimensions.

6. Click **Preview** to see an example of your report run with 1 record.
7. Click **Run** and the complete report is created using all of your selected records.
8. Click the **+ Filters** button if you would like to narrow down or analyze specific data, for example for specific employees or time periods. This section lets you set filters limiting the data which appears in your report.
9. Enter the name of your report in the upper left corner of the Report editor, underneath your company name and save it by clicking the **Save** button in the upper right corner of the Report editor.

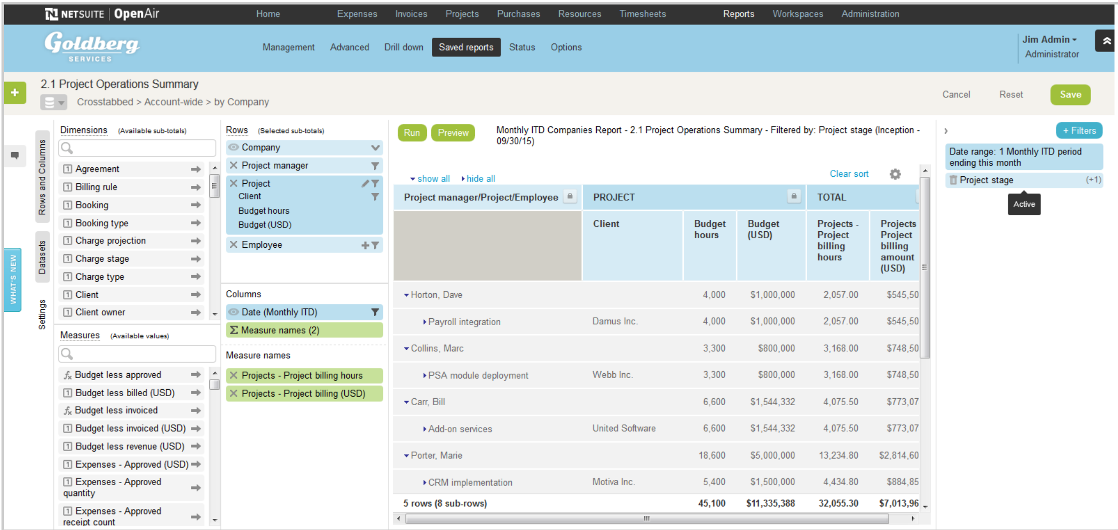
To create a new report (method 2):

1. Click the **Create** button on the upper left side of the screen. This can be done anywhere within OpenAir. If you were already within the Report editor, select **Report > New ...** You can also select **Account-wide: Report** from the Create new window in any other area of OpenAir. An empty report (based on the “Crosstabbed > Account-wide > by Company” template) is opened in the Report editor.
2. Drag-and-drop or click the appropriate dimensions and measures for your reports. Only Dimensions can be placed in the Rows box, and only Measures can be placed in Measure names box. The measure names container is present in the Columns box under the pre-defined Date dimension or only the Measure names box. As you place these elements, the preview window will automatically update to show you the new report layout configuration.
3. Click on Funnel icons to setup filters for dimensions.
4. Click **Preview** to see an example of your report run with 1 record.
5. Click **Run** and the complete report is created using all of your selected records.
6. Click the **+ Filters** button if you would like to narrow down or analyze specific data, for example for specific employees or time periods. This section lets you set filters limiting the data which appears in your report.
7. Enter the name of your report in the upper left corner of the Report editor, underneath your company name (default is “Untitled”) and save it by clicking the **Save** button in the upper right corner of the Report editor.

To create a new report (method 3):

1. From the Report editor, click the **Select dataset and data format** button ( ) on the upper left side of the screen, under the report name. A new report template (either empty or with the selected dimension or measure) is created.
2. Drag-and-drop or click the appropriate dimensions and measures for your reports. Only Dimensions can be placed in the Rows box, and only Measures can be placed in Measure names box. The measure names container is present in the Columns box under the pre-defined Date dimension or only the Measure names box. As you place these elements, the preview window will automatically update to show you the new report layout configuration.
3. Click on Funnel icons to setup filters for dimensions.
4. Click **Preview** to see an example of your report run with 1 record.
5. Click **Run** and the complete report is created using all of your selected records.
6. Click the **+ Filters** button if you would like to narrow down or analyze specific data, for example for specific employees or time periods. This section lets you set filters limiting the data which appears in your report.
7. Enter the name of your report in the upper left corner of the Report editor, underneath your company name (default is “Untitled”) and save it by clicking the **Save** button in the upper right corner of the Report editor.

Editing Reports in the Report Editor



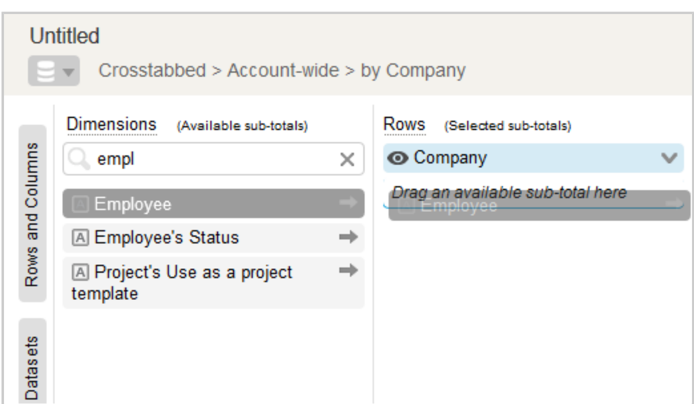
The Report editor lets you create, edit, test, and run reports all on the same screen, without the need to switch between forms and previews or to refresh the page.

At the top left is the **Report name**. Changing the report name from “Untitled” or any other name saves the report with the new name.

The **Select dataset and data format** button is located under the report name. Clicking it opens a menu which lets you select a template. The current report template type is presented next to the Select dataset and date format icon.

Next to the **Tips** button are three vertical tabs which can be clicked to show or hide various Report Editor elements.

- **Rows and Columns** shows/hides the list of Rows, Columns, and Measure names currently in the report
- **Datasets** shows/hides the list of Dimensions and Measures for crosstabbed report templates or Attributes for Tabular report templates which can be added to the report
- **Settings** shows/hides the list of settings which can be modified for the report.



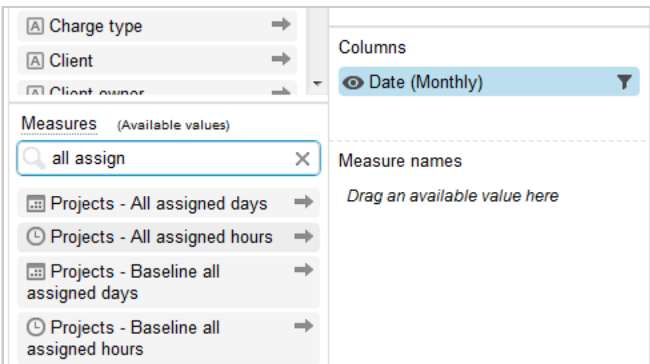
Rows can be customized by drag-and-dropping dimensions (which are usually text and date fields available for filtering and grouping) into the **Rows** section. You can also click directly on a dimension or measure and it will be added to the end of the rows or columns list. Hovering over **Dimensions**, **Measures**, or **Rows** opens a legend explaining what each icon in the interface means.

- Dimensions can be suppressed by clicking the **Suppress dimensions** icon .
- The Total column for measures can also be suppressed by clicking the **Suppress total column** icon Σ.
- Clicking the ✕ next to a selected dimension, measure, or attribute deletes it from the report layout.

A new picker type has been added to the reporting interface and can be used to select and reorder columns. To enable it, activate the **Use in-line multiple selection interface** switch in Personal Settings > Display Options.

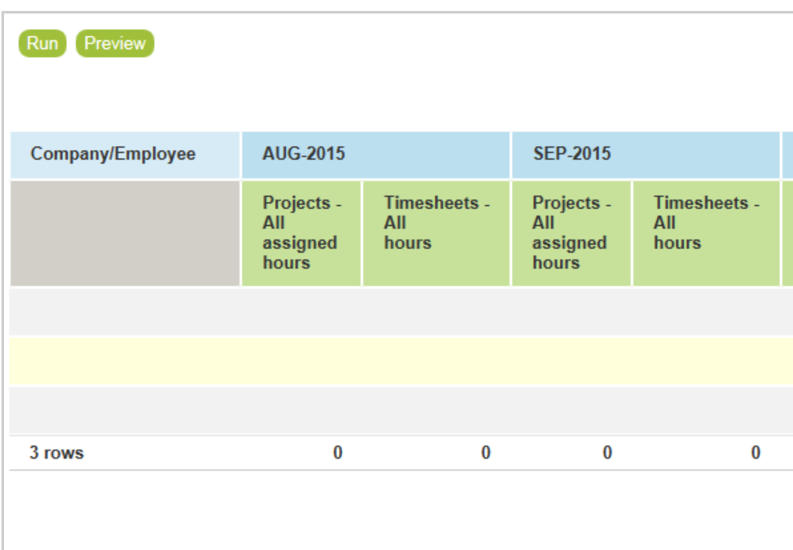
To Add Fields to Rows and to Rearrange Row Order

1. Click the **Modify** icon .
2. In the **All** tab, select attributes the which you would like to see in the report.
3. In the **Selected** tab, the attributes you have chosen appear, and can be moved with drag-and-drop functionality to change their order within the report.
4. Click **OK** in the bottom right of the picker window when you are finished.



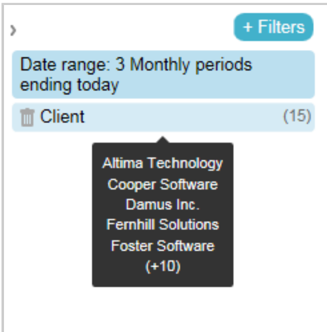
Measures (numeric values which can be aggregated, including counts, totals, or custom calculations) can be moved with drag-and-drop functionality into measure names.

You can type the names of dimensions and measures into their respective search fields to quickly find the ones you need. Smart search functionality eliminates the need to know the full name.



In the center of the interface, an instantly-updated preview shows you how your report layout will look — again, there is no need to navigate away from the report editor and the updates do not require a page refresh.

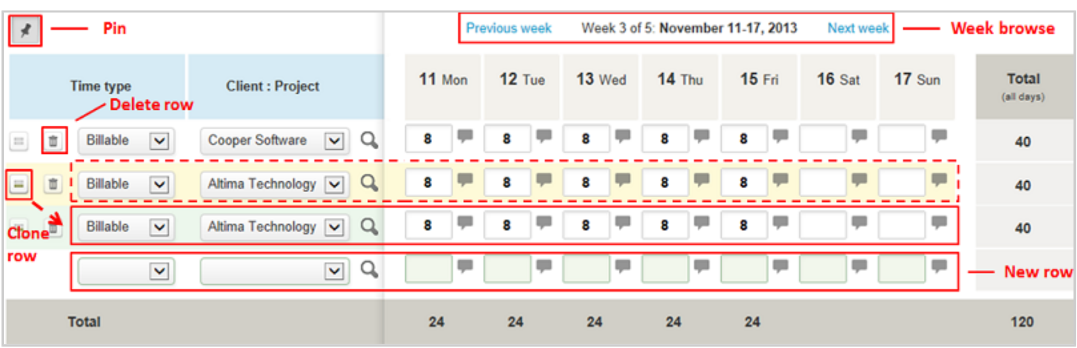
- Clicking **Run** will run the report from the Report Editor interface with all records.
- Clicking **Preview** will run the report with only one record, which lets you see the report with actual data, but without the need to wait for all of your records to be processed.



On the right side of the Report editor interface, you can add filters which limit the data which appears in the report. A picker window appears when you click on any existing filter, and lets you further customize each filter. Hovering over an existing filter shows a list of what is included within that filter.

Grids

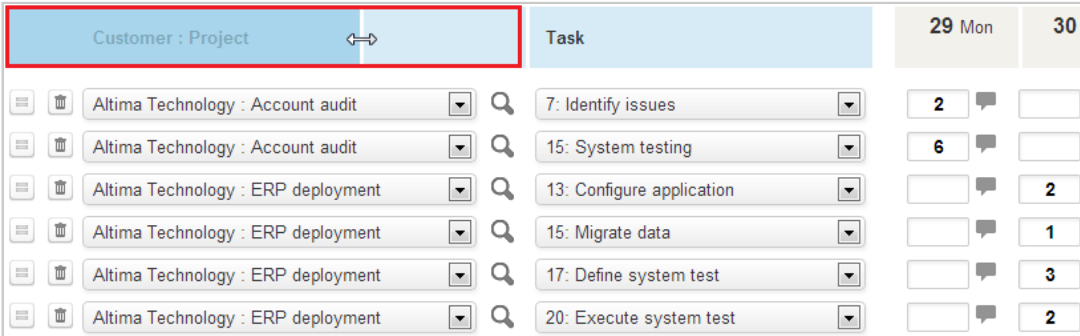
Timesheet grid



Timesheet grid features:

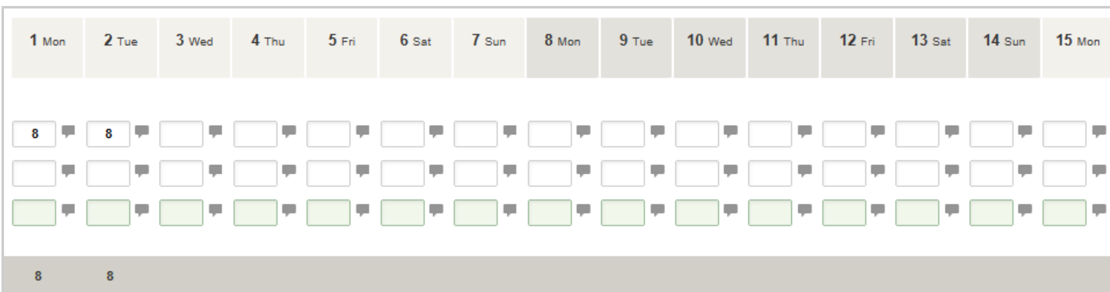
- **Pin** — Select to fix the calendar display on the right. When pinned the left side can be scrolled without losing the calendar view on the right.
- **Week browse** — Move quickly to the previous week or to the next week.
- **Delete row** — Click the **Delete** button next to a row and confirm the deletion to remove the row from the grid.
- **Clone row** — Click the **Clone** button next to a row and a complete copy of that row is created directly below it.
- **New row** — To speed data entry a new row is kept at the bottom of the timesheet. As soon as you start to fill out the new row another new row is automatically created.

Resizing timesheet columns



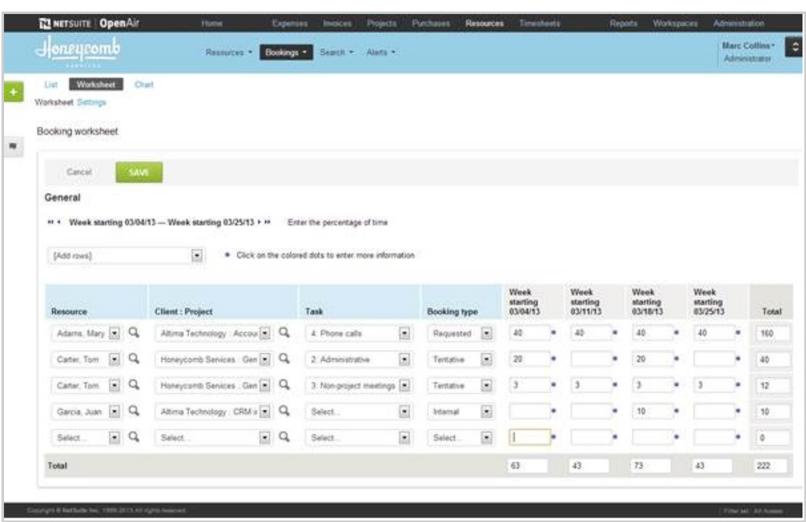
When this feature is enabled, simply hover your mouse over the edge of a column header and drag the column edge to the required size. The new column size will be remembered.

Multi-week timesheet view



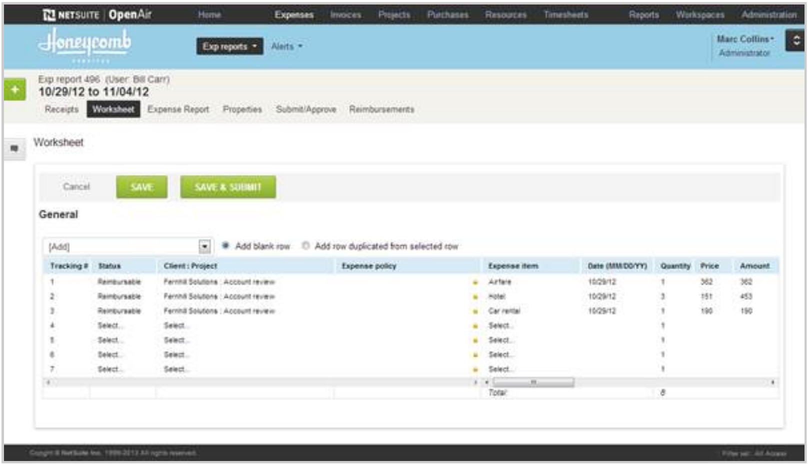
Multi-week timesheet view is set from User Center > Personal Settings > Timesheet Options > Display all weeks for timesheets containing multiple weeks.

Classic grid



Retains all the previous functionality with a clean fresh look.

Dynamic grid



Retains all the previous functionality with a clean fresh look.

Personal Settings

Click **Personal settings** in the User Center to configure your personal settings and optional features. Personal Settings override any corresponding settings set by your company.

> **Note:** The options which you see in your Personal Settings depend on your user role and your company's settings. Some options may not be available to you.

General

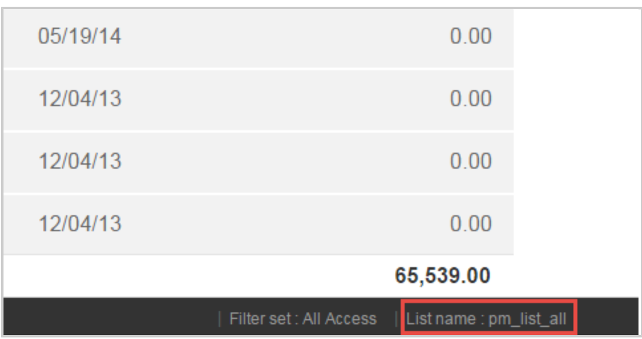
Allow support log in

When enabled, OpenAir Support personnel can log into your account. This setting is usually used for troubleshooting and support.

Optional Features

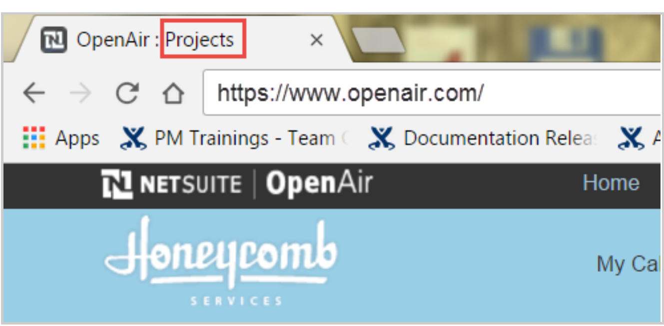
Show the list name in page footer

Displays the list name in the bottom right corner of the screen when in a list view.



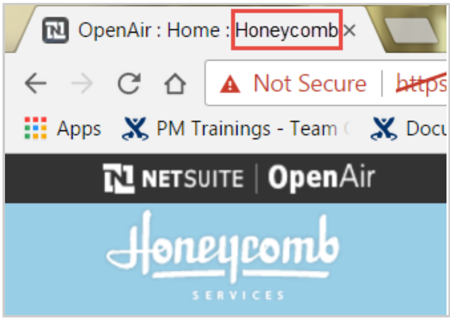
Show currently active module name in the browser title bar

Displays the name of the active module in the browser bar or tab. When this option is cleared, only "OpenAir" appears in the browser bar or tab.



Show company name in the browser title bar

Displays the company name in the browser bar or tab. When this option is cleared, only "OpenAir" appears in the browser bar or tab. The company name which appears is the same as the Company ID used on the OpenAir sign in page.



Time Settings

Time zone

Controls which time zone is used in OpenAir.

Use 24–hour clock for time entry and display

When selected, OpenAir uses 24–hour time (for example, 1:00 p.m. will appear as 13:00) for displaying time in the system. When cleared, OpenAir will display time using the 12–hour clock with "AM/PM" notation.

Regional Settings

Language

Controls the language used in OpenAir.

Date format

Controls how dates are displayed in OpenAir.

Number format

Controls how numbers and decimals are displayed throughout OpenAir, including whether a decimal is represented by a period (.) or comma (,), and which delimiter OpenAir uses for digit grouping in numbers larger than 999.

List separator for CSV output files

Controls which list separator (for example, a comma (,) or a semi-colon (;)) is used to separate values in CSV output files.

Print Settings

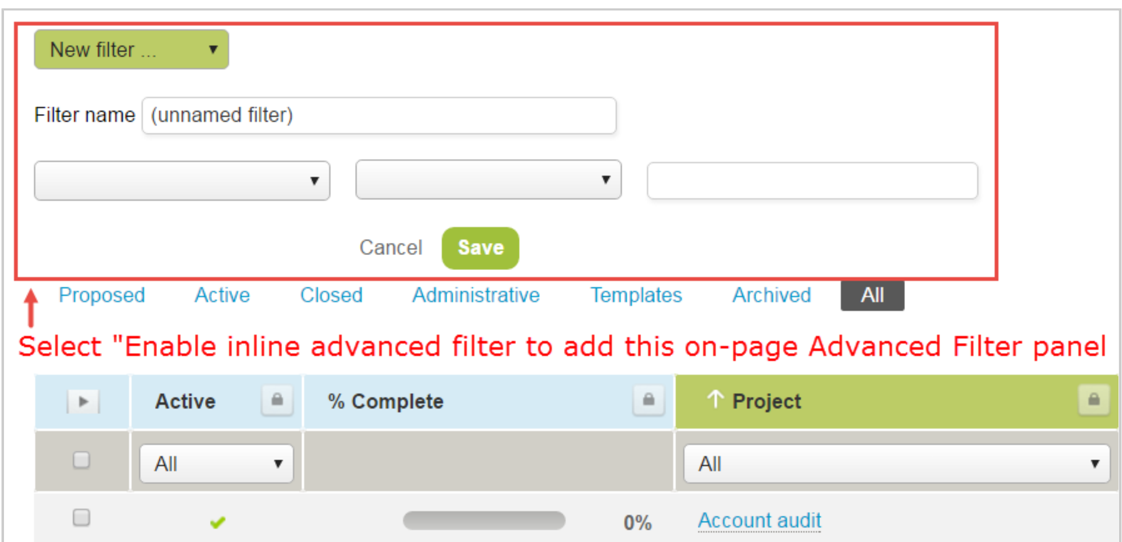
Page size for generating PDF pages

Controls whether OpenAir PDF files are generated in Letter or A4 size.

Page Layout

Enable inline advanced filter

Moves advanced filters into an on-page panel instead of a popup window. This setting also arranges filters vertically rather than horizontally when displaying them.



Dashboard Options

Display zero items on dashboard

Displays the entire array of reminder and status options available in the dashboard tab, even if there are no active items requiring attention. This option is disabled by default because the full set of items may be long if you have access to all service modules.

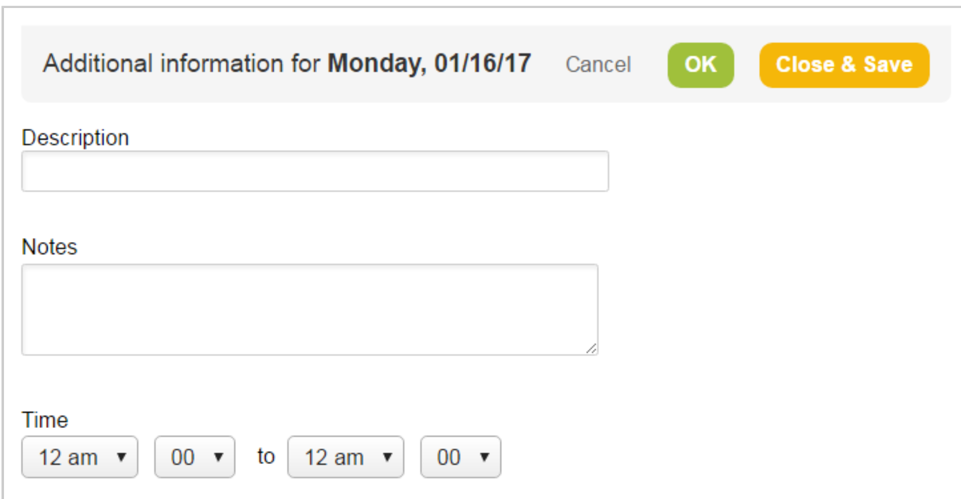
Timesheet Options

Sort timesheets alphabetically by client and project

This setting re-sorts time entries by client and project after saving. As time entries are input into the timesheet and submitted, the client:project entries are sorted alphabetically within each day instead of the order they are entered.

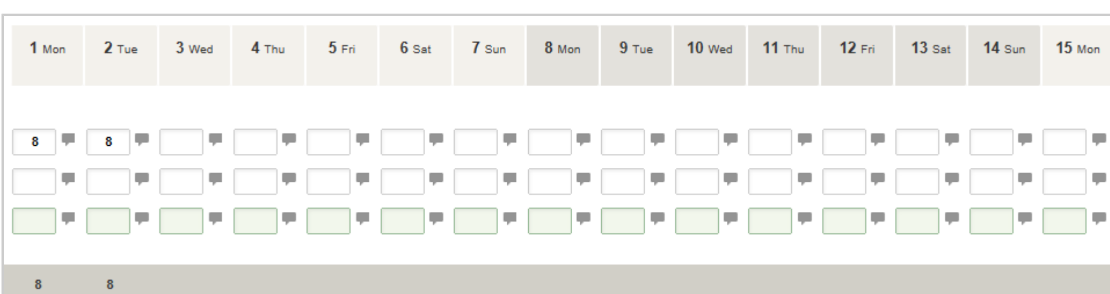
Enable start and end time entry on timesheets

When selected, you can enter both a start and end time in your timesheet entries, and the hours worked are calculated by the system. To enter start and end time entries, when in a timesheet, click the icon next to the date which you want to enter time for. A dialog appears where you can enter a description and notes for the activity, and the start and end times can be selected under “Time”. Click **OK** or **Close & Save** when finished.



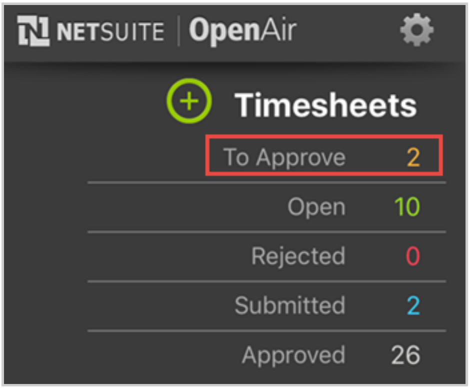
Display all weeks for timesheets containing multiple weeks

When this feature is enabled, you can work with all the weeks of a multi-week timesheet in the same grid view.



Enable Approvals on Mobile apps for Timesheets

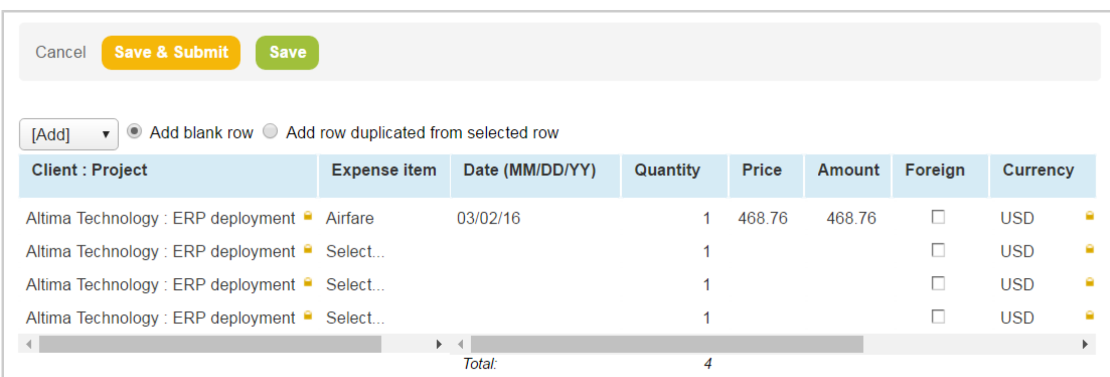
Displays the **To Approve** line for Timesheets on the OpenAir for Mobile app dashboards.



Expenses Options

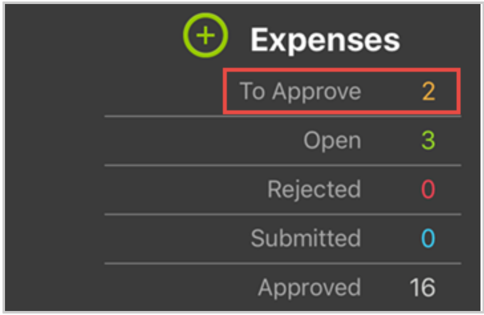
Default to expense worksheet when viewing an expense report

Automatically displays the expense worksheet when you create an expense report instead of displaying the receipts form.



Enable Approvals on Mobile apps for Expenses

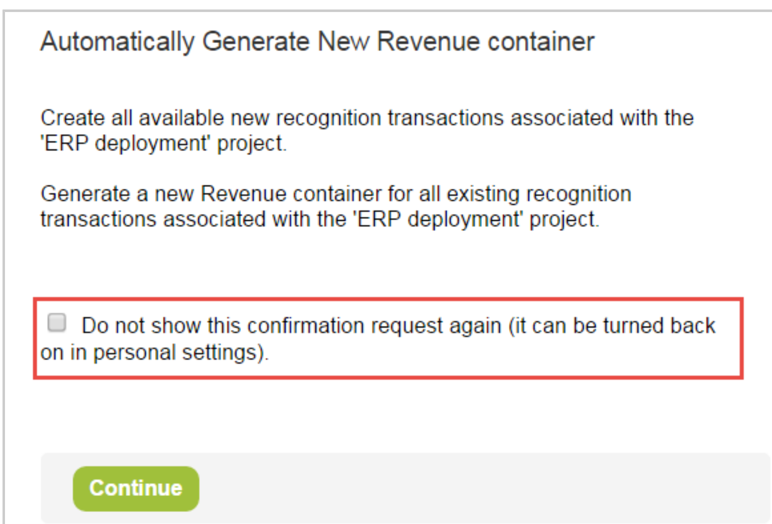
Displays the **To Approve** line for Expenses on the OpenAir for Mobile app dashboards.



Invoices Options

Disable confirmation when using the 'Generate New Revenue container' section on invoices.

When this option is cleared, OpenAir opens an "Automatically Generate New Revenue container" confirmation dialog when "Generate Revenue Container" or "Submit and Generate Revenue Container" are clicked in an invoice. Select this option to disable this confirmation dialog. This option can also be selected within the dialog itself.



Projects Options

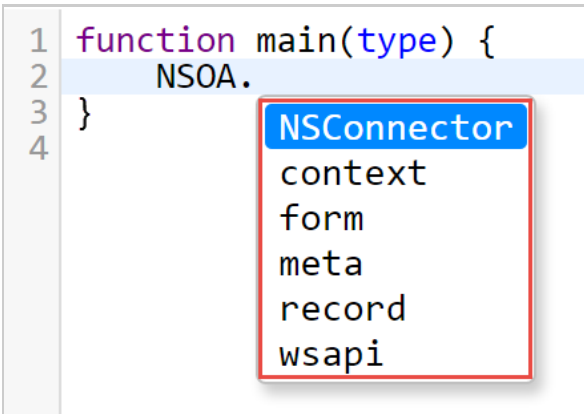
Preferred landing page for projects

Controls which page opens when a project is opened, for example, the Task List or Properties.

Scripting Studio Options

Enable script deployment editor content assist auto activation

When selected, when you type the text “NSOA” into the Scripting Studio editor, and then type a period (.), the Auto List window appears with all available options which can follow “NSOA.” in a script.



The user has the following options:

- Click on the required item with the mouse and double-click to select it.
- Use the up and down arrow keys to select the required item and then hit ‘Enter’ to select it.
- Type the first character of the required item (e.g. ‘m’) to highlight it and then hit ‘Enter’ to select it. If more than one item starts with the same letter then the first item will be highlighted and the list of options filtered.
- Hit ‘Esc’ to close the Auto List window and type as normal. Clicking outside of the editor window will also close the Auto List window.

Tip: Press <Ctrl> + <Space> to show the Auto List window at any point in the editor.

After selecting an item from the Auto List window, the value will be copied into the editor and typing continues after the inserted value.

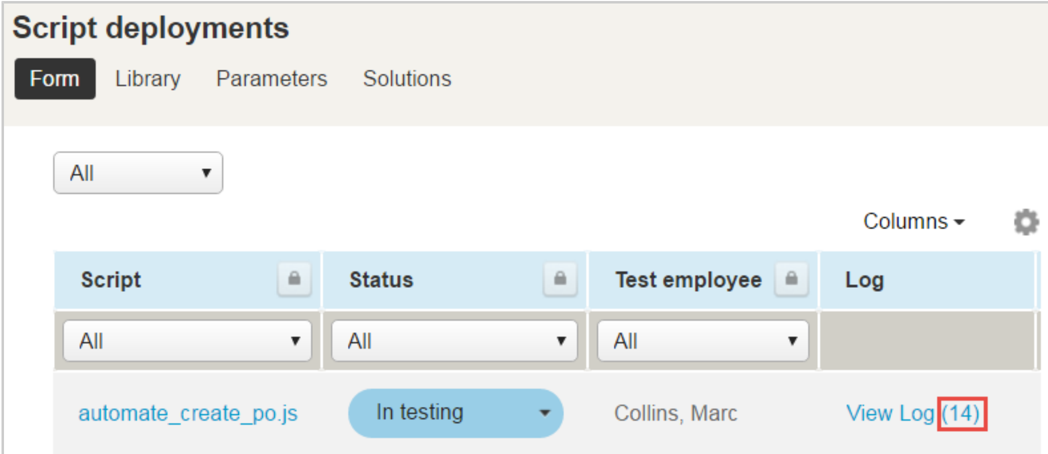
Script deployment editor content assist auto activation delay (milliseconds)

Controls the amount of time it takes for the Content Assist Auto Activation to appear after “NSOA.” has been typed in the Scripting Studio editor. The default value is 500 milliseconds, and the field accepts any positive number. This setting has no effect if “Enable script deployment editor content assist auto activation” is not selected.

Warning: Entering a value below 200 milliseconds may cause performance issues.

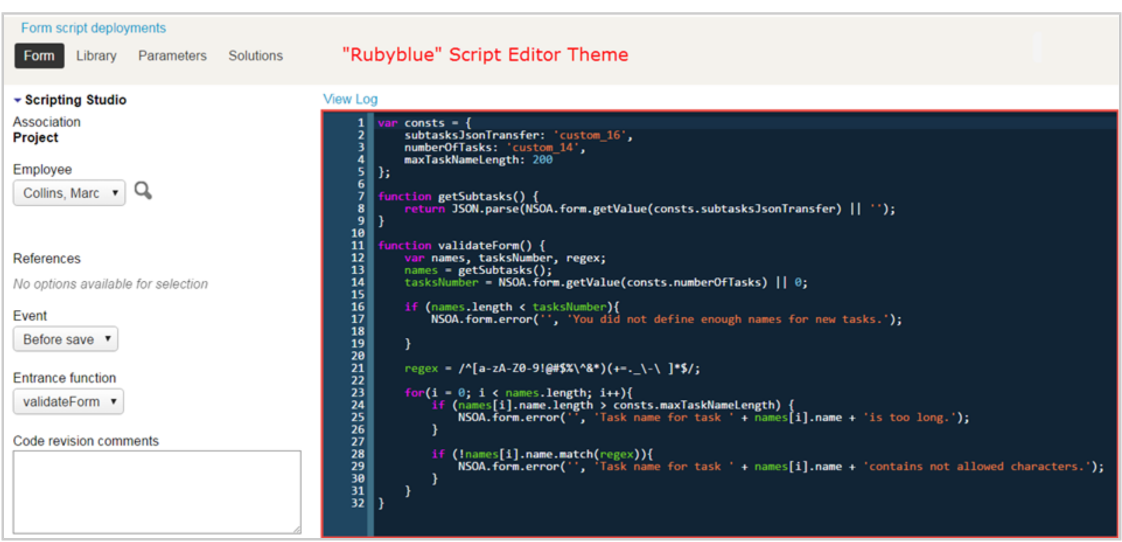
Display the number of logs at ‘View logs’ link

Displays the number of included logs next the **View Log** link in Script Deployments list views.



Editor Theme

Customize the script editor with a variety of selectable color schemes.



Font Size

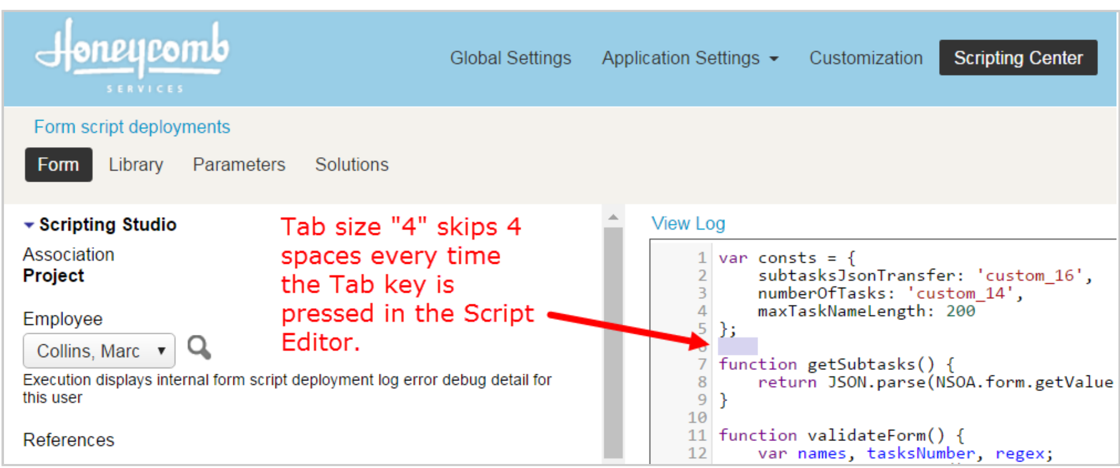
Customize the size of the text font in the script editor. This setting only affects the text within the Script Editor. All other OpenAir text uses the “Text size” User Center setting.

Indent Unit

Select whether an indent unit is a space or a tab in the script editor.

Tab Size

Set how many spaces a tab equals in the script editor.



Display Options

The following “Number of entries to display...” settings control how many entries appear in drop-downs throughout OpenAir.

For example, if creating a charge, you may only want to see those clients and projects which you use most frequently when selecting from the drop-down list in the "New charge" dialog. If you limit the number of client:project combinations which are displayed in these drop-downs, the drop-downs will display only those clients and projects which you have used most recently, up to the limit specified in these settings.

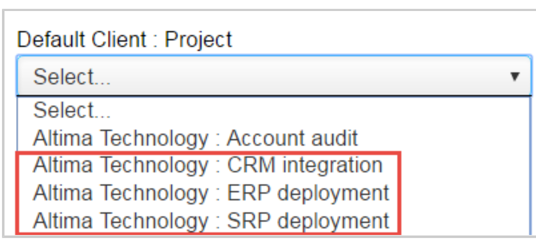
Tip: For the best performance, do not use the “All” option for the “Number of entries” settings.

- **Number of entries to display in client:project drop-downs**
- **Number of entries to display in client/prospect:deal drop-downs**
- **Number of entries to display in client drop-downs**
- **Number of entries to display in expense item drop-downs**
- **Number of entries to display in product drop-downs**
- **Number of entries to display in employee drop-downs**
- **Number of entries to display in vendor drop-downs**
- **Number of entries to display in approver drop-downs**
- **Number of entries to display in workspace drop-downs**

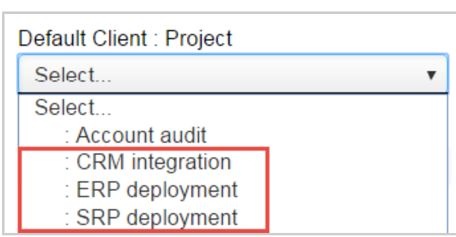
Shorten client:project drop-downs

Controls how text appears within “client:project” drop-downs. It contains three settings:

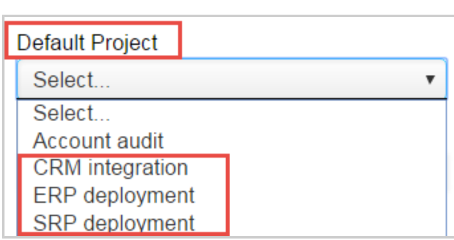
- **Do not shorten** — The drop-down displays both client and project



- **Remove client name, leave project name indented** — The drop-down displays a colon (:) and project name, but does not include the client name

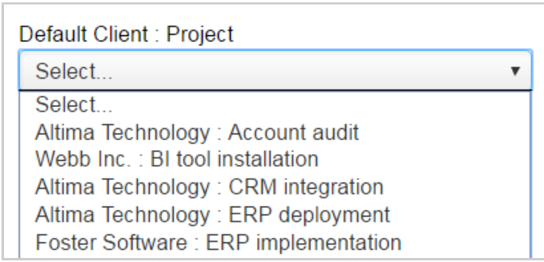


- **Remove client name and indentation of project name** — Only displays the project name, and renames the “client:project” drop-down to “project”.



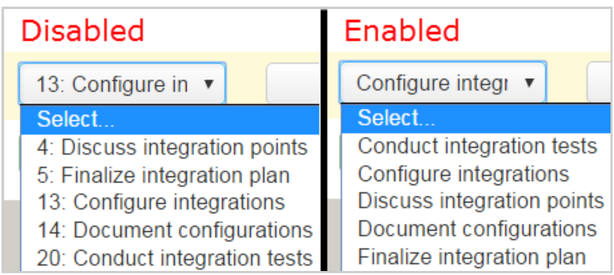
Sort the client:project drop-downs by project

Sorts client:project drop-downs alphabetically by project instead of by client. The display order in the drop-down will still be “client:project”.



Sort the task drop-downs by name and omit the ID number prefix

Displays tasks in task drop-downs in alphabetical order and removes the tasks’ number prefixes.



Maximum number of rows to display per day in ‘My Calendar’ monthly view

Controls how many rows are displayed for each day in the monthly “My Calendar” view.

Show ‘My Calendar’ tab in all modules.

Displays the “My Calendar” tab in all modules. When disabled, the “My Calendar” tab only appears in “Home”.

Note: If you have been assigned the “View calendars for other users” role permission, you will always see the “Calendars” instead of the “My Calendar” link in “Home”. When “Show ‘My Calendar’ tab in all modules.” is enabled in this situation, you will see “Calendars” in “Home” and “My Calendar” in all other modules.

Show Account tab in ‘My Account’ module only.

This setting is no longer supported, and has no effect on OpenAir.

Remember the size of popup windows

This setting is no longer supported, and has no effect on OpenAir.

Disable automatic resizing of popup windows

This setting is no longer supported, and has no effect on OpenAir.

Add the save or run button to the top right of forms

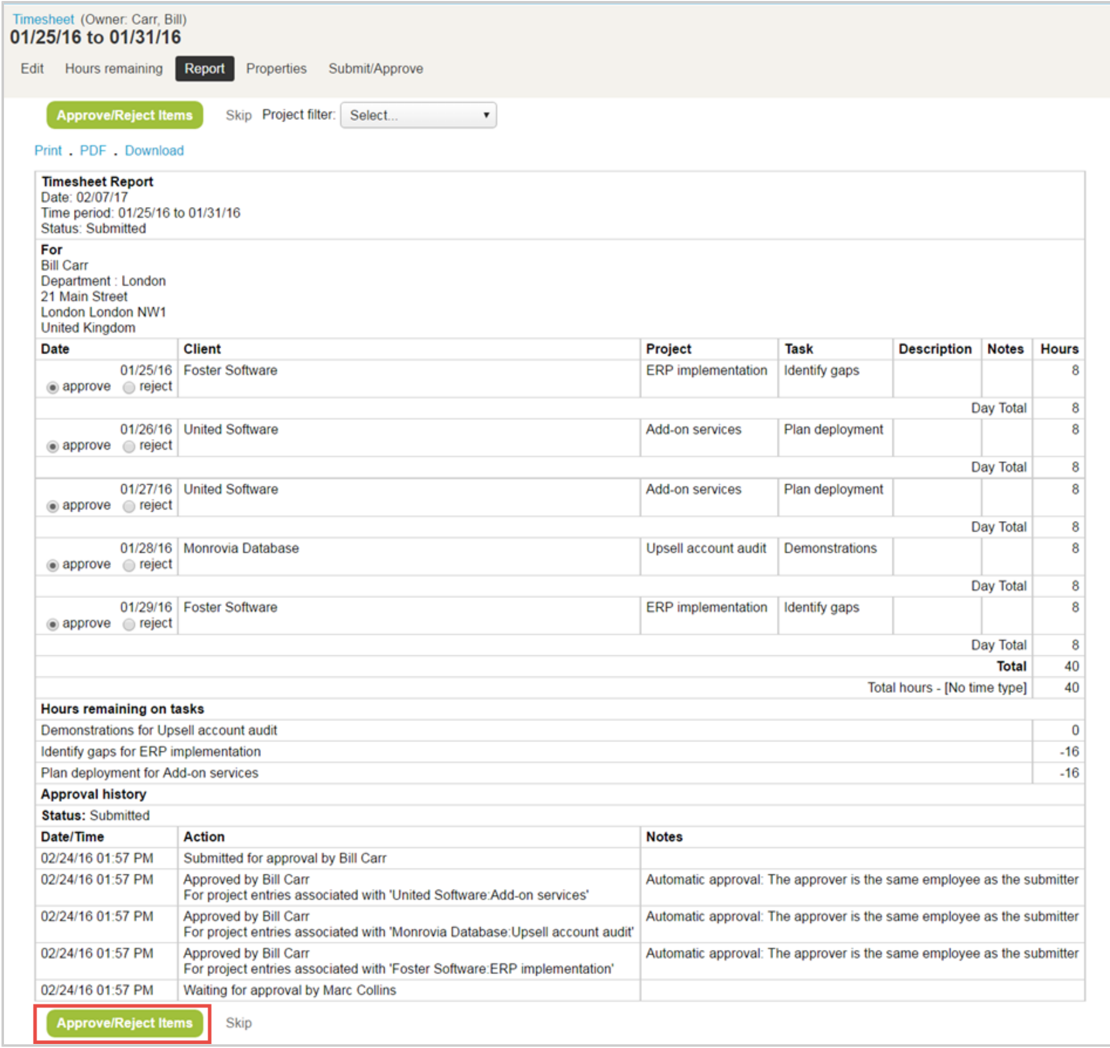
This setting is no longer supported, and has no effect on OpenAir.

Add “Save & create another” button to the top right of forms

This setting is no longer supported, and has no effect on OpenAir.

Add approval buttons to the bottom of reports

Adds an Approve/Reject Items to the bottom of Timesheet reports, as well as at the top of the report.



Timesheet (Owner: Carr, Bill)
01/25/16 to 01/31/16

Edit Hours remaining Report Properties Submit/Approve

Approve/Reject Items Skip Project filter: Select...

Print . PDF . Download

Timesheet Report
Date: 02/07/17
Time period: 01/25/16 to 01/31/16
Status: Submitted

For
Bill Carr
Department : London
21 Main Street
London London NW1
United Kingdom

Date	Client	Project	Task	Description	Notes	Hours
01/25/16 approve reject	Foster Software	ERP implementation	Identify gaps			8
					Day Total	8
01/26/16 approve reject	United Software	Add-on services	Plan deployment			8
					Day Total	8
01/27/16 approve reject	United Software	Add-on services	Plan deployment			8
					Day Total	8
01/28/16 approve reject	Monrovia Database	Upsell account audit	Demonstrations			8
					Day Total	8
01/29/16 approve reject	Foster Software	ERP implementation	Identify gaps			8
					Day Total	8
					Total	40
					Total hours - [No time type]	40

Hours remaining on tasks

Demonstrations for Upsell account audit	0
Identify gaps for ERP implementation	-16
Plan deployment for Add-on services	-16

Approval history
Status: Submitted

Date/Time	Action	Notes
02/24/16 01:57 PM	Submitted for approval by Bill Carr	
02/24/16 01:57 PM	Approved by Bill Carr For project entries associated with 'United Software:Add-on services'	Automatic approval: The approver is the same employee as the submitter
02/24/16 01:57 PM	Approved by Bill Carr For project entries associated with 'Monrovia Database:Upsell account audit'	Automatic approval: The approver is the same employee as the submitter
02/24/16 01:57 PM	Approved by Bill Carr For project entries associated with 'Foster Software:ERP implementation'	Automatic approval: The approver is the same employee as the submitter
02/24/16 01:57 PM	Waiting for approval by Marc Collins	

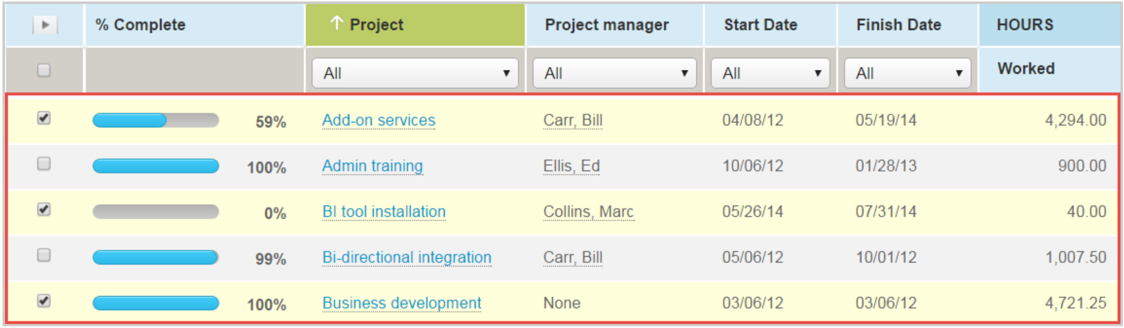
Approve/Reject Items Skip

Anchor column titles at top of page when scrolling vertically

Column titles in list views and reports will remain in view when scrolling down the page.

Preserve row highlighting when checking checkboxes in list views

When you select a checkbox in a row in any list view, the row is highlighted in yellow to indicate the selected rows. Several rows can be highlighted at once to show all selections made before saving the list.

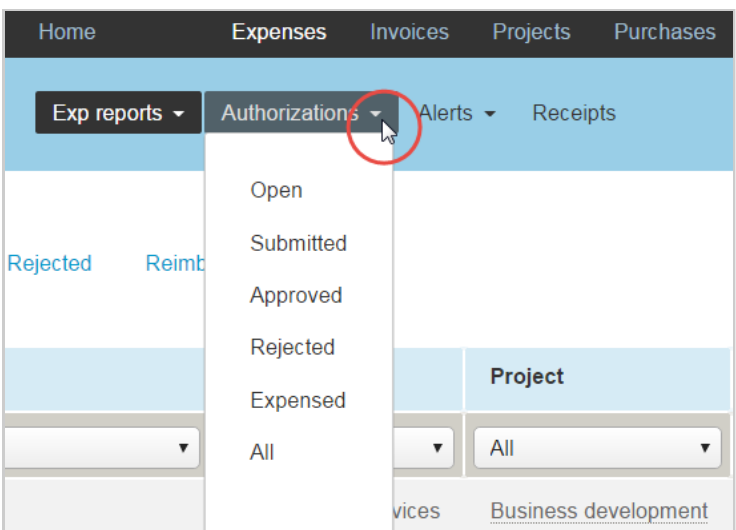


Enable anchoring of left columns when scrolling horizontally

Row titles in list views and reports will remain in view when scrolling across the page.

Hovering over menu links reveals menu options

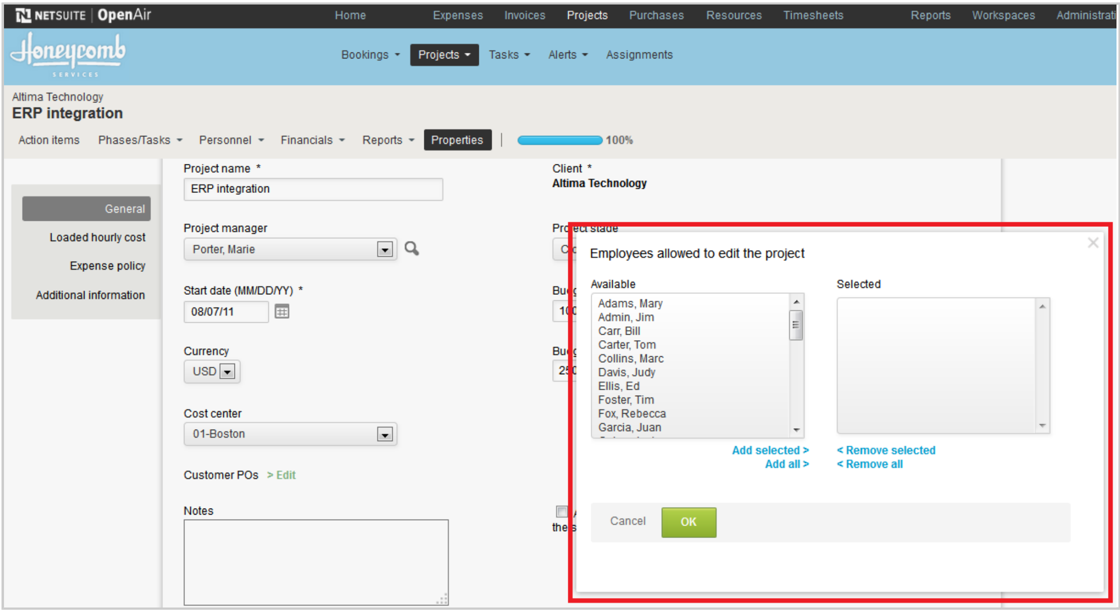
Drop-down menus open automatically when pointing to a menu with the cursor. When this setting is disabled, click the menu link to open the drop-down.



Open popups as panels instead of windows.

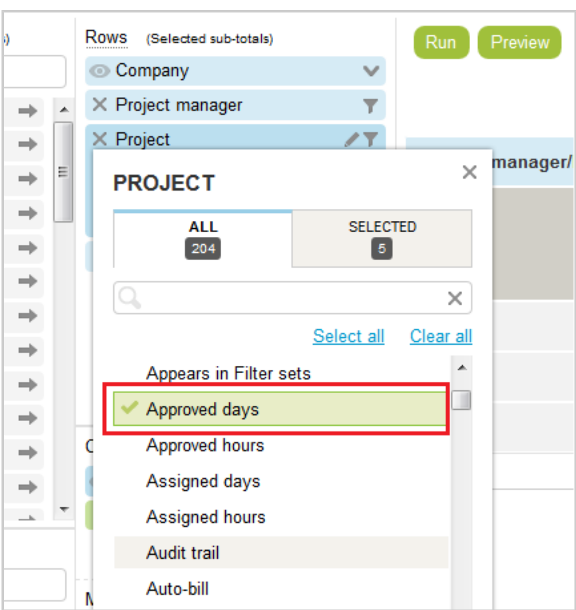
Opens OpenAir popups as in-form panels, instead of as new windows. In-form popups have all of the advantages of conventional popup windows, but appear as part of the form. This allows you to block popup windows in your browser and still use all OpenAir functionality.

Tip: Selecting this option is an OpenAir best practice!



Use in-line multiple selection interface.

Uses an in-line picker selection interface in various modules.



Disable QuickView

Disables QuickViews, preventing them from appearing when pointing to fields which open them.

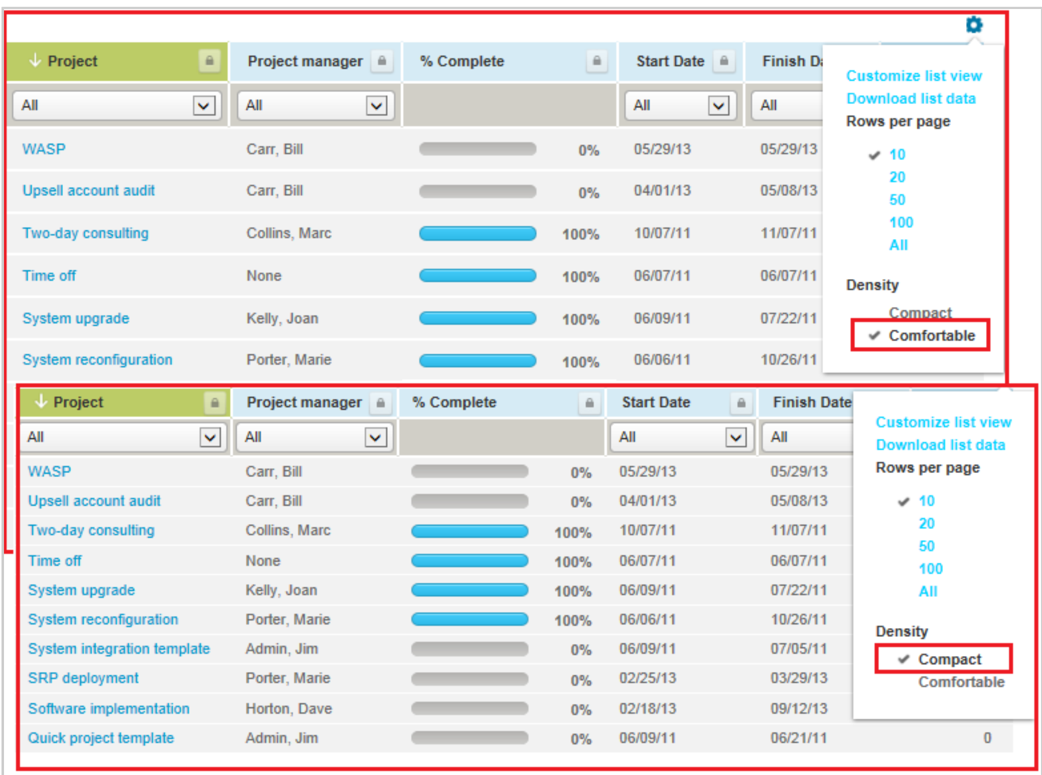
QuickView popup activation delay

Sets the time it takes for a QuickView window to open when pointing to a field which opens a QuickView. The options available in the drop-down are time in seconds. This setting has no effect if "Disable QuickView" is selected.

Data Density

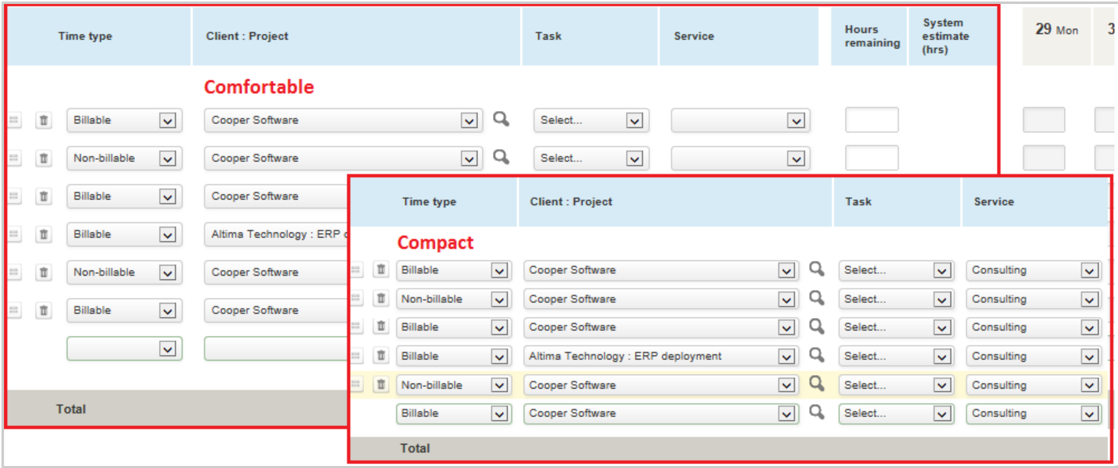
Control the data density displayed in list views with selected mode.

Controls the appearance of data in list views. In "Compact" mode, the margins are trimmed and headings wrap to make more data visible. "Comfortable" mode provides more spacing.



Control the data density displayed in timesheet grid with selected mode.

Controls the appearance of data in timesheet grids. In "Compact" mode, the margins are trimmed and headings wrapped to make more data visible. "Comfortable" mode provides more spacing.



Starting Application

Controls which module is opened by default when logging into OpenAir.

Email Settings

Bcc me on all emails

Includes you as a Bcc recipient (i.e. other recipients do not see you on the recipient list) on all emails you send from OpenAir, including from actions which trigger emails. For example, if you approve a timesheet, and the person who submitted the timesheet receives an automatic email notification of the approval, you will also receive a copy of the notification.

References

This section outlines the terminology and new icons used in the new user interface.

- Terminology
- Icons

Terminology

Term	Description
Canvas	The Canvas is the display area for the various screens.
Create Button	The Create Button draws together all the content creation actions into a common area.
In-Module Navigation	The second menu bar allows users to navigate through the functionality provided by the module. See Navigation.
Main Navigation	The top menu bar allows users to select the navigate between the available modules. See Navigation.
Form Navigation	Form Navigation is a Form control that allows you to quickly navigate around large forms.
Portlets	A Portlet encapsulate a piece of visual functionality e.g. Chart. and can be resized and moved around as required. Portlets are used to organize the Home / Dashboard screens.
Sidebar	The Sidebar provides quick access to the most frequently used tools.
Tips Button	The Tips Button moves all the OpenAir tips into a more convenient location.
User Center	The User Center draws together all user features into a common area.

Icons

Icon	Description
	Create new content. See Create Button.
	Access screen tips. See Tips Button.
	Swap to Full view. See View Button.
	Collapse the Portlet
	Expand the Portlet

Icon	Description
	Run bulk actions. See List View.
	Show List Options.
	Export chart as an image. See Chart.
	See User Center.