OpenAir

Customization Guide

ORACLE® NETSUITE

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Introduction

Overview

OpenAir is a highly configurable system. Users can set personal settings to tailor the system according to the way they prefer to work, see the OpenAir User Guide for details. Administrators configure the company settings to tailor the system according to their company business processes, see the OpenAir Administration Guide for details. Professional Services set the necessary internal switches when your OpenAir account is configured. If you decide to take advantage of additional functionality, you can create a support ticket to OpenAir Support and request that an internal switch be enabled in your account, see the Release Notes published with each new release.

OpenAir customization is one component of the NetSuite OpenAir platform, allowing you to customize OpenAir to better meet the unique needs of your business.

This guide describes the following features:

- Custom Fields
- Form Permissions
- Notifications
- Approval Processes

To use the customization features, you need to be logged in as an administrator.

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Customizing OpenAir
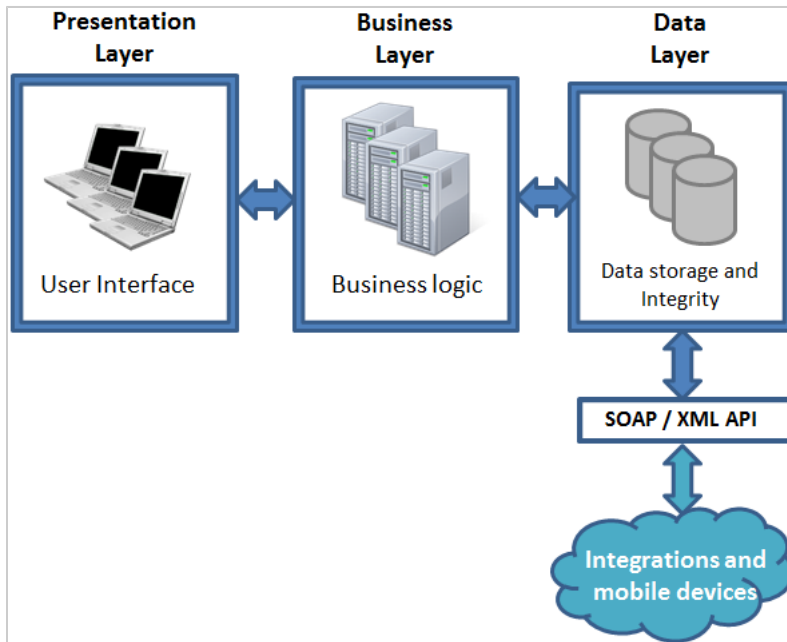
> **Note:** This guide does not cover user scripting. Please refer to the OpenAir User Scripting guide for user scripting details.

Presentation Layer

Users interact with OpenAir through forms and fields. You can extend these forms by creating Custom Fields and then define how users can interact with the fields by setting Form Permissions. Custom fields have a data component (Entity) and user interface component (Form), see Entities and Forms.

Custom fields are displayed together as a block on a form. Your can organize the custom fields using Dividers and Sections and positioned them as required on the form. See Custom Field Position.

Custom Messages can be display to assist and enforce the user in following your business processes.

Business Layer

You can extend and create business rules through Form Permissions, Notifications, and Approval Processes.

The Custom Fields you create can be added into your business rules.

Data Layer

You can create Custom Fields to track additional information.

Custom fields have a data component (Entity) and user interface component (Form), see Entities and Forms. If you just want to create a data component with no user interface component then select the **Hide on data entry forms** check box for the custom field, see Defining Custom Fields.

The custom fields you create are available through the SOAP / XML API. NetSuite OpenAir also uses custom fields to support additional features and integrations.

SOAP / XML API

OpenAir provides both SOAP (Web Services) and XML APIs as a layer for the exchange of OpenAir data between the main site and peripheral programs. These programs include partnered Web sites, OpenAir in-house applications that don't need direct database access, and third party applications indirectly supported through OpenAir.

The application programming interface (API) is data-centric, but it is not a direct line into the OpenAir database. While it provides access to much of the information on OpenAir, it is a layer of indirection from the actual database structure. OpenAir's database structure may change, but applications that use the APIs will not need to change. The SOAP API serves as a wrapper around the XML API, providing the same or very similar functionality.

For more information on the XML API see the OpenAir XML API Reference Guide. For more information on the SOAP API (Web Services) see the OpenAir SOAP API Reference Guide.

> ⓘ **Note:** The SOAP API can be directly accessed via User Scripting, for more information see the OpenAir User Scripting guide.

Customization
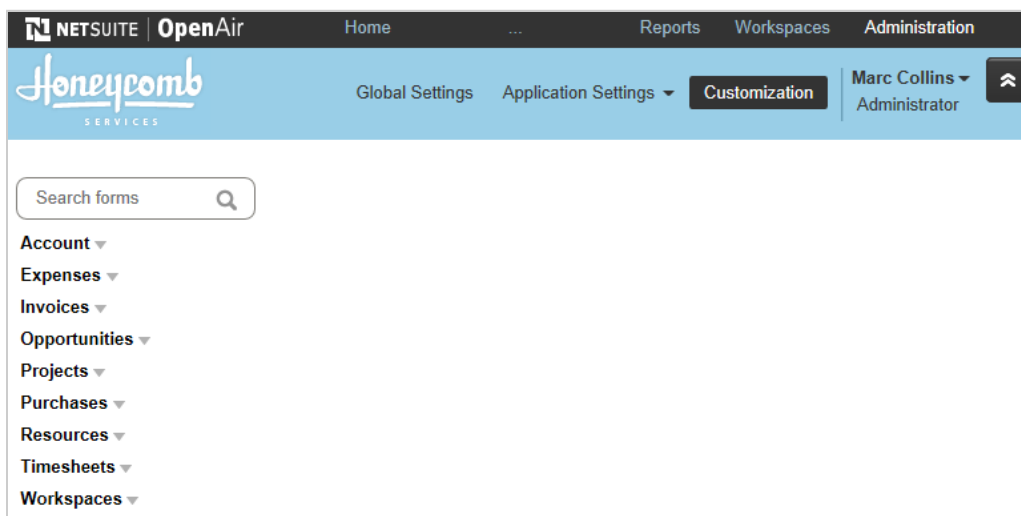
The **Customization** tab in the Administration module provides a central location to access all the customization features of all the OpenAir forms. This lets you set all the form permissions from one place without having to navigate to each form one by one and accessing **Modify the form permissions** from the **Tips**.

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Simply type part of the form name you need into the search box and the matching forms will be instantly filtered and displayed as you type. Then click on the form name to view or edit the details.

Click on the tabs, make changes, and click SAVE.

Note that some forms can have different permissions set depending on the mode the form is in. This is shown by the mode in square brackets following the form name.

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Custom Messages

Messages displayed on a form can originate from a number of sources:

1. Form messages can be created on Modify form permissions. See Form message for details.

2. Information, Warning and Error Messages can be created by the standard OpenAir form validation and via user scripting. See the OpenAir User Scripting guide for details.

3. Custom messages can be created in permission rules on Modify form permissions. See Permission rules for details.

Scripting Center

The **Scripting Center** tab in the Administration module gives complete control over all script deployments and development activities from a central location.

Please refer to the OpenAir User Scripting guide for details on the Scripting Center.

Set Form Default Values

Set form default values lets you establish common values that pre-populate forms when creating the following:

- Projects
- Tasks
- Timesheets
- Receipts
- Bookings
- Milestones
- Billing rules
    - Time billing rule
- Revenue Recognition rules
    - Percent complete rule
    - As billed rule
    - Expenses rule
    - Fixed amount on date or milestone rule
    - Fixed amount on percent complete rule
    - Incurred vs. forecast rule
    - Tome project billing rule

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Values can be set for specific roles, so the role of each employee would dictate which values are defaulted. If the defaults apply globally, they may be applied to all roles. Defaults can be set for a variety of fields, including custom fields.

To Set Form Default Values:

1. Create a new form which supports form default values (see list above).
2. Click the link to **Set default form values** from the **Tips Button**.

   A copy of the form appears.
3. Select a role or accept the default of All.
4. Complete all fields for which default values are desired.
5. Click Save.

Use caution in setting default form values. We do not recommend setting default values for fields that are often changed during data entry. Setting too many default values can result in data entry errors because employees may forget to change key input data.

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Custom Fields

Overview

OpenAir comes with a number of standard fields but you may find that there are other items you would like to track throughout the system. To accommodate this, you can define custom fields for specific objects in OpenAir.

Custom fields are used in OpenAir for a variety of purposes:

- You can create custom fields to extend the standard OpenAir forms to track additional information.
- You can create custom fields to extend the internal entities (data items) stored by OpenAir.
- OpenAir also uses custom fields to support additional features and integrations.

> ⚠️ **Important:** Do not rename or amend these OpenAir custom fields as this will prevent the feature/integration from working as intended.

Custom fields display in a group based on the entity association, see Entities and Forms. The group defaults to the bottom of the specific form on which they display. Form Permission rules rules help in hiding or showing certain custom fields given certain events.

You can view and edit custom fields from **Administration > Global Settings > Custom Fields**.

Custom Field Rules

- You can create a new custom field from anywhere in OpenAir, just select **Custom fields** from the **Create Button**
- When creating a custom field, you associate it with a particular object in OpenAir along with the type of field you are creating. The Association drop-down list displays all areas of OpenAir where you may create custom fields.

> **ⓘ** **Note:** Once a custom field has been created and associated with an object or form in OpenAir, it cannot be changed to another form or object

- For each custom field, you must define a name that contains no spaces. You may use underscores. This name is used within the OpenAir database.

- You must also include a display name that users see on the form.

- You may also enter a hint that displays below the field explaining the intended use of the custom field.

- There is no limit to the number of custom fields you can create.

- By default, newly created custom fields are positioned at the bottom of the form, see **Display Custom Fields before form field** in Form options. Once created you can modify the custom field to change its position, see Custom Field Position.

- Once a custom field has been created it cannot be deleted if it has been used.

> **✔** **Tip:** If you no longer need a custom field you can set it as not **Active**.

For step-by-step information on how to create and define a custom field, see Creating and Modifying Custom Fields.

Creating and Modifying Custom Fields

To create a custom field:

1.
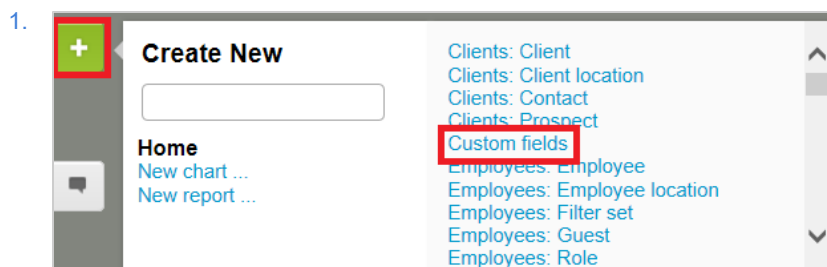
You can create a new custom field from anywhere in NetSuite OpenAir, just select **Custom fields** from the **Create Button**.
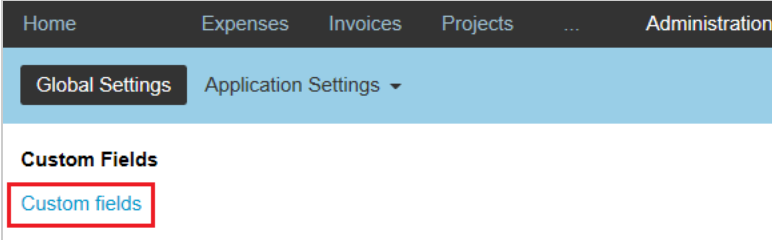
2.
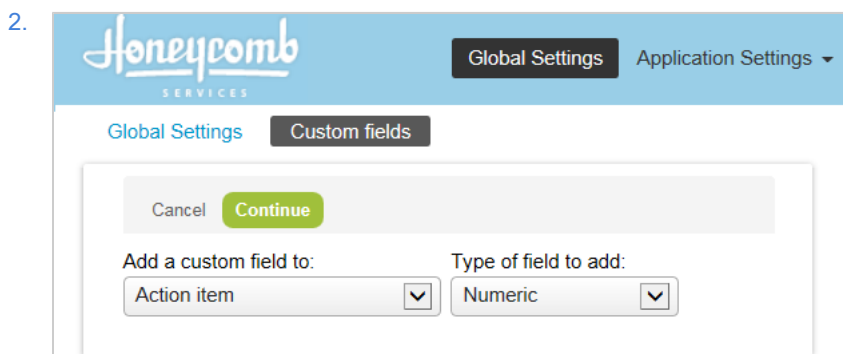
Select the entity the custom field is associated with along with the type of field you are creating. Click Continue.

> ⓘ **Note:** Once you have created a custom field, the entity and type of field cannot be changed. See Entities and Forms for details on the available entities and see Custom Field Types for details on the types of fields.

3. Fill out the custom field form values. See Defining Custom Fields.

4. Click Save.

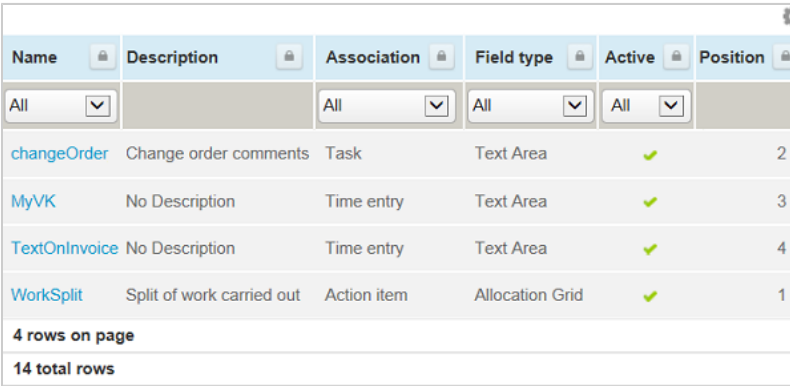> ⓘ **Note:** To change the position a field displays see Custom Field Position.

To view, modify, and delete a custom field:

1.

Go to **Administration > Global Settings > Custom fields**.

2.

To view or modify an existing custom field, click on the name of the custom field.

> ⓘ **Note:** The position field shows the order in which the fields are displayed on the form. See Custom Field Position.

3.

- **Cancel** — Click cancel to undo any changes you have made.
- **Delete** — Click to delete the custom field. You will be prompted to confirm that you really want to delete the custom field.

> ⓘ **Note:** You only have the option to delete the custom field if it has not been used. You can, however, always set the custom field as not active, and you can rename the custom field.

- **Save** — Click to save the changes you have made to the custom field.

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See Defining Custom Fields for details on changing the field values.

Defining Custom Fields

Administration > Global Settings > Custom fields > [select or create Custom field]

To define a custom field:

1. Type the **Field name**. This is required and must be unique. The name cannot have any spaces, but you can use underscores. The name can not start with a number. The **Field name** is used internally and maybe used in reports, API calls and user scripts.

   > ⚠️ **Important:** Changing the name of a custom field that is in use may break existing reports, integrations, and user scripts.

2. Select the **Active** check box.

   > ℹ️ **Note:** If **Active** in not checked then it will not be visible in the OpenAir system and will not be available on forms, reports or API calls. You can check active again to bring it back. Unchecking **Active** will not delete any data stored for it in the database

   > ⚠️ **Important:** Custom fields cannot be deleted if they have been used. If you no longer need a custom field you can set it as not **Active**.

3. Type a **Description**. This is optional and is used for adding information about the new custom field. You will see the description when you go to Administration > Global Settings > Custom Fields. See Creating and Modifying Custom Fields.

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> ℹ️ **Note:** If you do not enter a description then the text "No Description" will be displayed.

4. Type the **Display name**. This is required and is used to label the custom field on the form associated with the entity.

5. If required, type a **Hint** to help your OpenAir users understand the intent of the custom field.

6. Fill out the specific fields for the selected type of custom files. See Custom Field Types for details.

7. If you select the check box to **Hide on data entry forms**, this custom field does not display on the form.
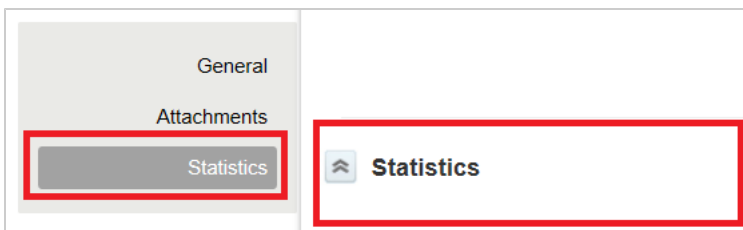
8. If you select the check box for **Add notes**, a text box displays under the custom field for users to add any additional notes.

9. Set the **Divider** and **Divider text** as required, see Dividers and Sections.

> ℹ️ **Note:** The **Position** drop-down is available after you have saved a new custom field. You can then modify the custom field to set the position. See Custom Field Position.

Dividers and Sections

You can create a section and divider line when you create or modify a custom field.

If you select the check box for Divider, a divider line displays before the custom field. You can also type Divider text that creates a new section at the bottom of the form.

> ℹ️ **Note:** If you enter the same Divider text into two custom fields, you will end up with two section created with the same name.

To place a custom field into a section:

1. Go to Administration > Global Settings > Custom Fields.

2. Click on the name of the custom field.

3. Select the **Divider** checkbox to display a divider line directly above the custom field if required.

    You may want to use divider lines when you are defining a new section that needs to stand out on the form. For example, a series of custom fields defining a topic such as contract management may start with a Contract received check box. The divider line indicates the start of the contract management fields. The divider line does not determine which section the custom field is included in.

4. Enter **Divider text to create a new section.**

> ✔️ **Tip:** To add multiple custom fields to the same section, set the **Divider text** for the custom field in the first position, but leave the **Divider text** blank for the following custom fields.
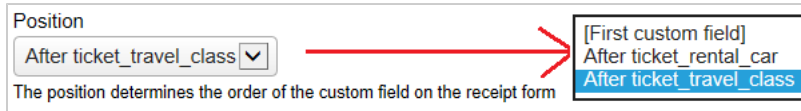
5. Click Save.

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> ⓘ **Note:** The display of the divider before custom fields can disabled by Form options.

Custom Field Position

The **Position** drop-down is available after you have saved a new custom field. You can then modify the custom field to set the position.

To set a custom field position:

1. Go to Administration > Global Settings > Custom Fields.
2. Click on the name of the custom field.
3. Select the desired setting from the **Position** drop-down list.

   You can either specify the field as the *[First custom field]* or specify an existing custom field that this field should be displayed directly after.

    > ✔ **Tip:** The order in the drop-down list shows the current order of custom fields.
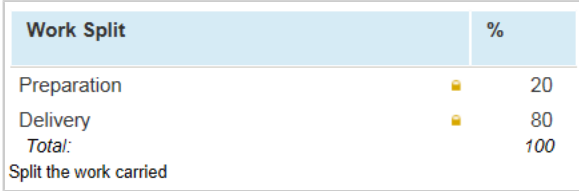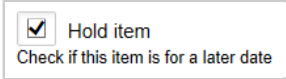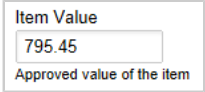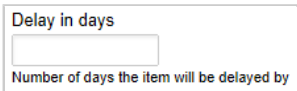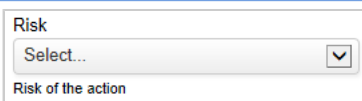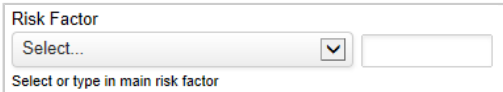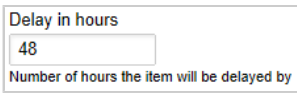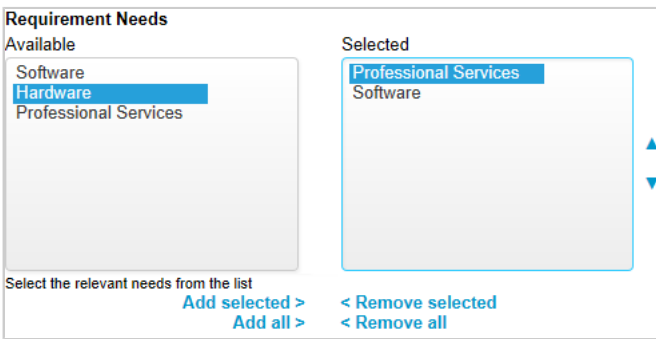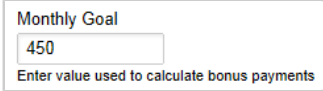
4. Click Save.
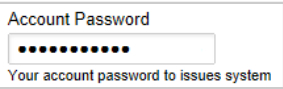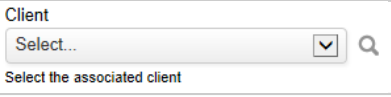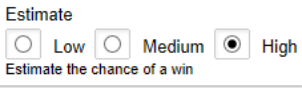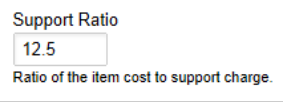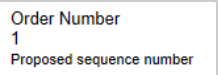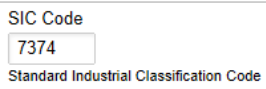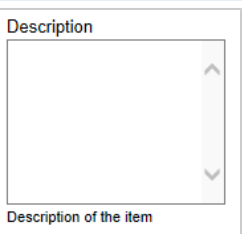
> ⓘ **Note:** The position of the custom fields in relation to the standard form fields is determined by the Form options.

Custom Field Types

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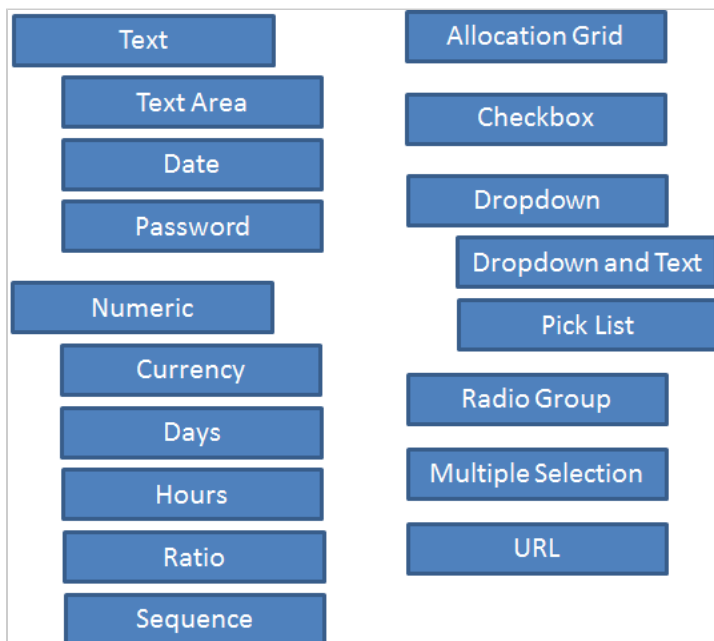
The following table illustrates the different types of custom fields you can create. The special setting for each type are listed together with each **Field Type**. See Creating and Modifying Custom Fields for the common custom field settings.

Field Type	Example...
Allocation Grid ■ Allocations must equal 100%	
Checkbox ■ Checked	
Currency ■ Field size ■ Decimal positions ■ Required	
Date ■ Default to Current Date ■ Required ■ Unique	
Days ■ Field size ■ Decimal positions ■ Required	
Dropdown ■ Values ■ Required	
Dropdown and Text ■ Field size ■ Max data length ■ Values ■ Required	
Hours ■ Field size ■ Decimal positions ■ Required	
Multiple Selection ■ Value list ■ Required ■ Allow ordering	
Numeric ■ Field size ■ Decimal positions ■ Required ■ Unique	

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Field Type	Example...
Password	**Account Password** •••••••••• Your account password to issues system
Pick List ■ List source	**Client** Select... ▼ 🔍 Select the associated client
Radio Group ■ Value list ■ Default to first value in list for new entities	**Estimate** ○ Low ○ Medium ◉ High Estimate the chance of a win
Ratio ■ Field size ■ Decimal positions ■ Required	**Support Ratio** 12.5 Ratio of the item cost to support charge.
Sequence ■ Next sequence number	**Order Number** 1 Proposed sequence number
Text ■ Field size ■ Max data length ■ Required	**SIC Code** 7374 Standard Industrial Classification Code
Text Area ■ Field width ■ Rows ■ Required	**Description** Description of the item
URL ■ URL ■ Link name ■ Action	**Project Statement of Work** SOW > Edit

Allocation Grid

Work Split		%
Preparation	🔒	20
Delivery	🔒	80
Total:		*100*
Split the work carried		

Allocation grids can be helpful in a number of use cases, but typically only work for small customers because of the amount of maintenance they require and how they work in reporting. The allocation grid custom field allows you to automatically report on a percentage of a number, where the percentage is stored in the allocation grid, and each value/row in the grid becomes its own reporting column.

Some of the uses of the allocation grid are for commissions when there is a small sales team and to proportion revenue among departments. For example, you might split revenue 60/40 or 50/50, regardless of users who actually performed the revenue. The allocation grid has the ability to split

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transactions across the assigned percentages within summary reports. OpenAir supports a feature for SFDC Opportunity Product Line to OA Allocation Grid.

> **(i) Note:** If you don't see Allocation Grid as an available type then you need to have the **Enable custom field allocation grids** switched enabled for you.

- **Value list** — Enter the allocation names.
- **Allocations must equal 100%** — If you check this box, the form will not be allowed save unless any allocations total 100%.
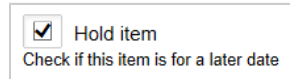
> ℹ️ **Note:** You can still save the form if all the allocations are set to 0, i.e. if no allocations have been assigned.

See Creating and Modifying Custom Fields for more details.
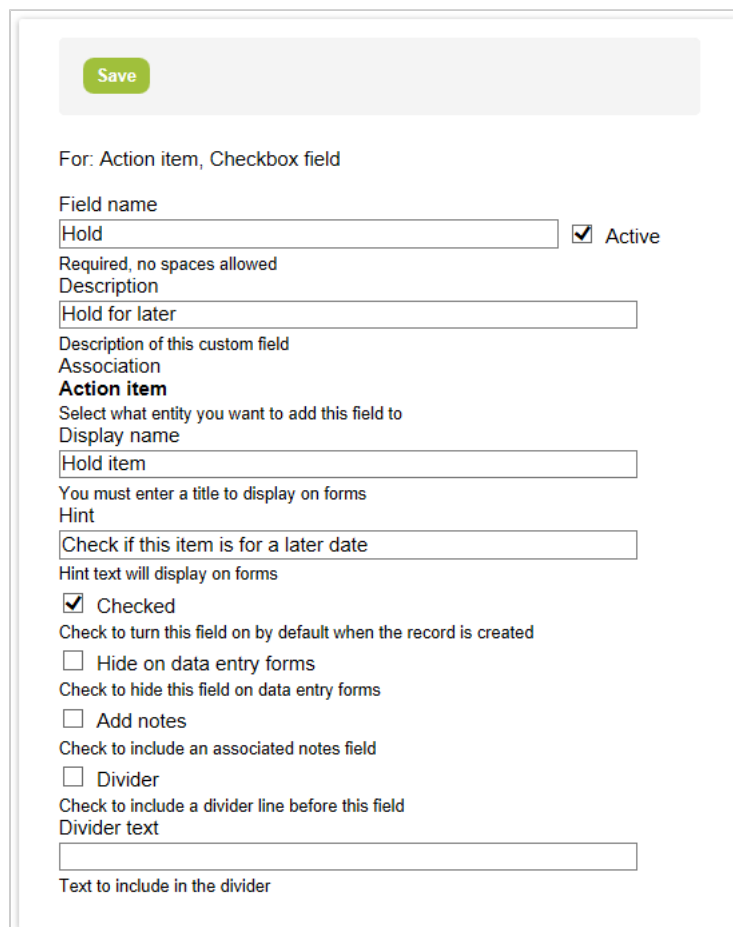
For the full list of types, see Custom Field Types.

Checkbox

With a checkbox custom field, users can only select a value or not select it. This type of field lends itself to a true or false value.

Using checkboxes for data elements allows for flexible reporting. Since the values are defined by being checked or unchecked, the field filters for data reporting.

- **Checked** — If you check this box, the Checkbox field will be checked by default when creating a new entity.

See Creating and Modifying Custom Fields for more details.
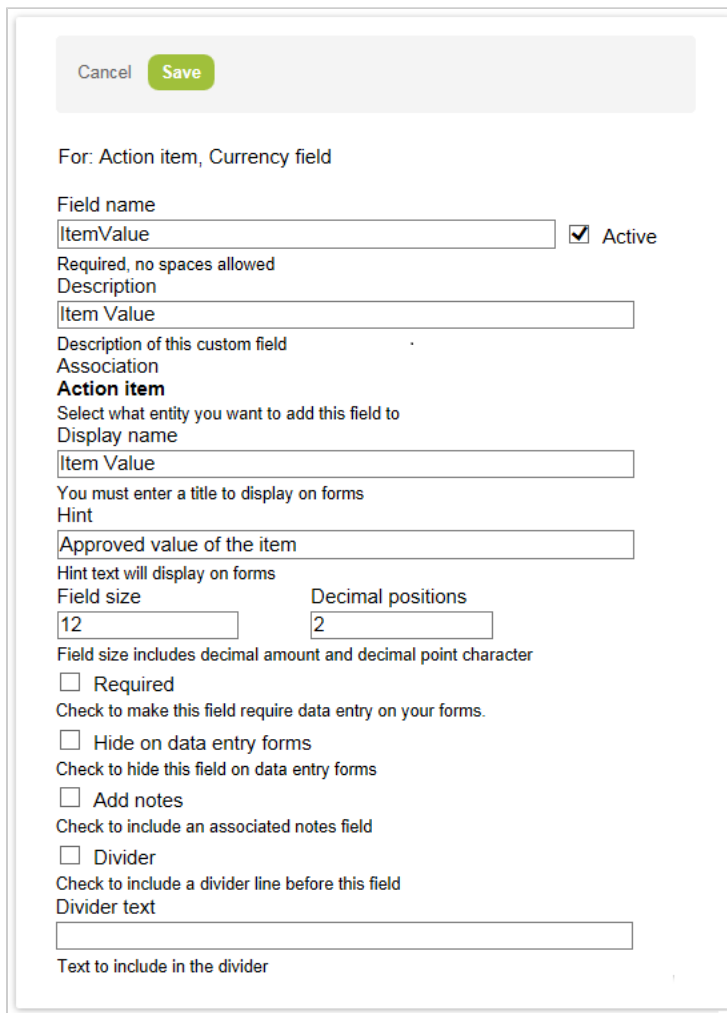
For the full list of types, see Custom Field Types.

Currency

Currency fields are used to store a dollar or other currency value. By using currency fields, you can store values that can be reported on later as well as used in custom calculations. For example, you might set a bonus rate on the User Demographic form that could later be used to calculate bonus payments using either calculated fields or by downloading the data to Microsoft Excel.

You need to establish the Field size, which is the total field length including the decimal character, and the Decimal positions, indicating the number of digits to the right of the decimal.

- **Field size** — This is the number of digits you can type including any separator characters. For example, "1,000,000.11" takes a **Field size** of 12.

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> **Note:** Comma separators are stripped, so "1,000,000.11" is displayed as "1000000.11".

▪ **Decimal positions** — This is the number of digits that are saved after the decimal point.

> **Note:** Rounding is applied if you type more digits than specified. For example, if you set **Decimal positions** to 2, then "55.756" will be saved as "55.76".

▪ **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Date

Date fields store a date value. By using date fields, you can store values that can be later reported on. For example, you could set a start date or birthday on the User Demographic form that could later be reported on in Detail Reports. The date format defaults to the format selected in Regional Settings.

You can set the date field to default to today's date by selecting the check box to Default to Current Date.

Date fields are provided with a Calendar feature to select a date. You can either directly type in a date or use the calendar feature by clicking the icon next to the date field.

- **Default to the current date** — If you check this box, the custom field will default to today's date when creating a new entity.

- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

- **Unique** — If you check this box, a unique value must be entered in the field to be able to save the form.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Days

Days fields store day values for an entity that can be later reported on. For example, you could set a Days value on a task that could be the standard allotted time for that task.

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- **Field size** — This is the number of digits you can type including any separator characters. For example, "1,000,000.11" takes a **Field size** of 12.

  > ⓘ **Note:** Comma separators are stripped, so "1,000,000.11" is displayed as "1000000.11".

- **Decimal positions** — This is the number of digits that are saved after the decimal point.

  > ⓘ **Note:** Rounding is applied if you type more digits than specified. For example, if you set **Decimal positions** to 2, then "55.756" will be saved as "55.76".

- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Dropdown

Dropdown fields allow users to select a value from a pre-defined list of values. Only one value can be selected per Dropdown field. These selected values can be reported on. For example, you may create a list of sales reps for projects in order to create reports for commission purposes. Custom Dropdown fields can be used in both Summary and Detailed Reports. In Summary Reports, the Dropdown fields can be subtotaled and filtered to limit data in the report. In addition to limiting value selections, this is a primary advantage of using a Dropdown field instead of a text field.

> ⚠ **Important:** Dropdown field values are stored as text in the database. You should not edit or remove existing values from a Dropdown field that have been in use unless you are aware they may require some database cleanup afterwards.

- **Values** — Enter the values to appear in the drop-down list.
- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

If you have the **Enable the advanced custom field value editor and conditional associations between values of separate custom fields** switch enabled:

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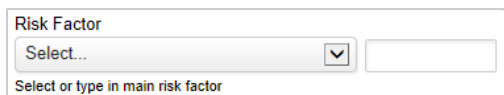
To add Values:

1. Click the **Values** text area to display the **New Field Values** popup.

2. Click the + button to add a new value.

3. Type in the value and click OK next to your new value.

4. Repeat above steps to add all the required values.

5. Click OK at the bottom right of the popup to save the values.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Dropdown and Text

Dropdown with Text fields allow users to select a value from a pre-defined list of values or add a text value. Only one value can be selected per Dropdown with Text field. In other words, you cannot pick from the list of values AND add text. You may do one or the other. For example, you can create a list of partners for projects and users may select one. Users could also enter a new partner if the value does not display in the list of values.

The selected values can be reported on in both Summary and Detailed Reports. In Summary Reports, Dropdown with Text fields can be subtotaled and filtered.

> **Note:** The filter in Summary Reports only includes values from the defined Value list. The text users enter cannot be filtered.

> **Important:** Dropdown field values are stored as text in the database. You should not edit or remove existing values from a Dropdown field that have been in use unless you are aware they may require some database cleanup afterwards.

Cancel Save

For: Action item, Dropdown and Text field

Field name

RiskFactor ☑ Active

Required, no spaces allowed
Description

Risk Factor

Description of this custom field
Association
Action item
Select what entity you want to add this field to
Display name

Risk Factor

You must enter a title to display on forms
Hint

Select or type in main risk factor

Hint text will display on forms
Field size   Max data length

10   25

Field size and length are measured in characters; field size is required
Value list

Time
Budget
Resources

Possible value list, one value per line
☐ Required
Check to make this field require data entry on your forms.
☐ Hide on data entry forms
Check to hide this field on data entry forms
☐ Add notes
Check to include an associated notes field
☐ Divider
Check to include a divider line before this field
Divider text
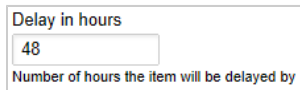
Text to include in the divider

- **Field size** — This controls the visible size of the text field displayed next to the drop-down list. The value is the number of characters visible to the user at one time.
- **Max data length** — This is the maximum number of characters a user can type into the text field.
- **Value list** — Enter the values to appear in the drop-down list. Use only one value per line.
- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Hours

Hours fields store hour values for an entity that can be later reported on. For example, you could set an Hours value on a task that could be the standard allotted time for that task.

- **Field size** — This is the number of digits you can type including any separator characters. For example, "1,000,000.11" takes a **Field size** of 12.

> **ⓘ Note:** Comma separators are stripped, so "1,000,000.11" is displayed as "1000000.11".

- **Decimal positions** — This is the number of digits that are saved after the decimal point.

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> (i) **Note:** Rounding is applied if you type more digits than specified. For example, if you set **Decimal positions** to 2, then "55.756" will be saved as "55.76".

- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Multiple Selection

Multiple Selection fields allow users to select multiple values from a pre-defined list. Users may choose one value, multiple values, or all values.

Selected values can be then reported on. For example, you can create a list of project influences for projects that can be reported on for bonus purposes. Multiple Selection fields can be used in both Summary and Detailed Reports. However , you cannot summarize or filter data with Multiple Selection fields. You can only report on data.

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- **Value list** — Enter the values to appear in the selection list. Use only one value per line.
- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.
- **Allow ordering** — If checked, up and down buttons will appear next to the **Selected** list.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Numeric

Numeric fields are used to store a numerical value. By using Numeric fields, you can store values that can be reported on as well as used in Custom Calculations. For example, you could set a Monthly Goal on the User Demographic form that could later be used to calculate bonus payments using either calculated fields or by downloading the data to Microsoft Excel.

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- **Field size** — This is the number of digits you can type including any separator characters. For example, "1,000,000.11" takes a **Field size** of 12.

  > ℹ **Note:** Comma separators are stripped, so "1,000,000.11" is displayed as "1000000.11".

- **Decimal positions** — This is the number of digits that are saved after the decimal point.

  > ℹ **Note:** Rounding is applied if you type more digits than specified. For example, if you set **Decimal positions** to 2, then "55.756" will be saved as "55.76".

- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

- **Unique** — If you check this box, a unique value must be entered in the field to be able to save the form.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Password

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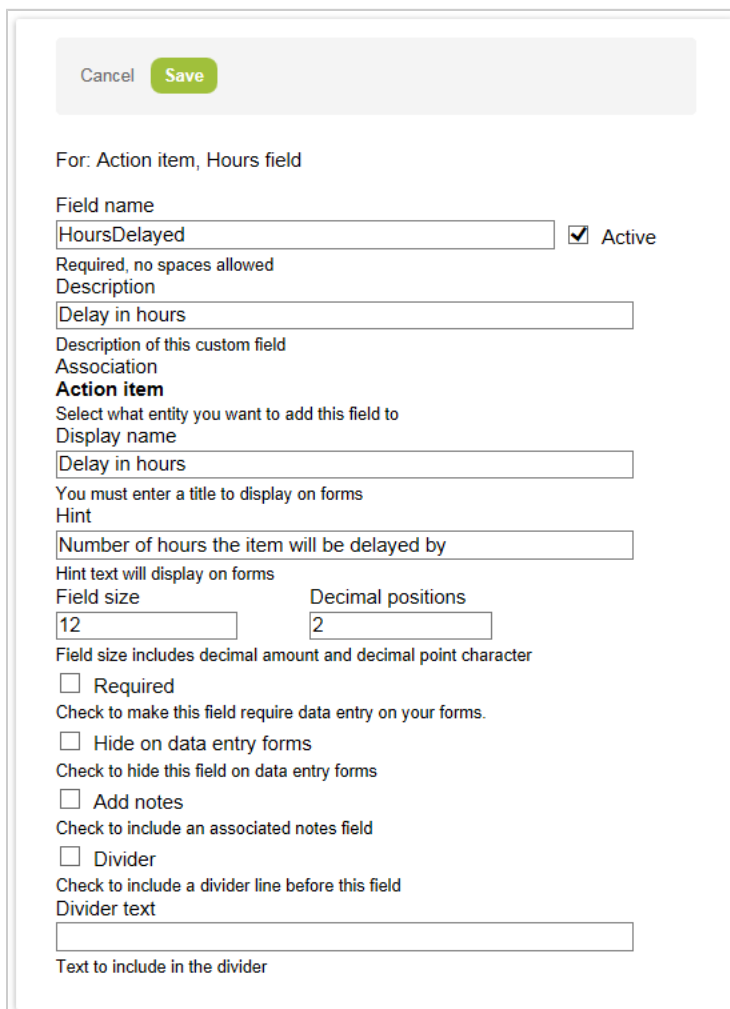Password fields are similar to text fields, but they have a maximum length of 30 characters and mask the values displayed as they are typed. Passwords are stored in the database in encrypted form. You can paste text into a Password field, but your cannot copy or cut text from a Password field. Password custom fields are useful for integrations with other systems that require a stored password.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Pick List

A pick list consists of two paired list boxes with links to move items between the list boxes. The left list box holds all the available items and the right list holds all the selected items.

To select items, select one or more item in the left list and then click on the Add selected link. To select all items, click on the Add all link.

To remove selected items, select one or more item in the right list and then click on the Remove selected link. To remove all select all items, click on the Remove all link.

> ℹ️ **Note:** If you don't see Pick List as an available type then you need to have the **Enable custom field pick list** switched enabled for you.

The search icon is displayed next to the Pick List if you select a **List Source** with a very large list of options. Click the search icon to use the advanced search feature.

- **List source** — Select the source for the list values.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Radio Group

Radio Groups allow a user to choose one selection out of two or more choices. This type of field is functionally similar to a Dropdown custom field, whereas only one value may be chosen by the user.

The selected values can be then reported on in both Summary and Detailed Reports. For example, you can create a list of account managers for projects to be reported on for commission purposes. In Summary Reports, Radio Group custom fields can be subtotaled and be filtered to limit data in the report.

Value list

- **Value list** — Enter the names to use for the radio buttons. Use only one value per line.
- **Default to first value in list for new entities** — If you check this box, the first radio button will be selected by default when creating a new entity.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Ratio

Ratio fields can be modified as needed by accessing the entity form and changing the value. Ratio fields are very useful if you need a custom field included in a calculated field because they can be multiplied or divided against all other types of number fields such as numeric, currency, and hours, to name a few.

Cancel **Save**

For: Action item, Ratio field

Field name

SupportRatio ☑ Active
Required, no spaces allowed
Description

Support Ratio
Description of this custom field
Association
Action item
Select what entity you want to add this field to
Display name

Support Ratio
You must enter a title to display on forms
Hint

Ratio of the item cost to support charge.
Hint text will display on forms
Field size   Decimal positions

5   2
Field size includes decimal amount and decimal point character
☐ Required
Check to make this field require data entry on your forms.
☐ Hide on data entry forms
Check to hide this field on data entry forms
☐ Add notes
Check to include an associated notes field
☐ Divider
Check to include a divider line before this field
Divider text

Text to include in the divider

- **Field size** — This is the number of digits you can type including any separator characters. For example, "1,000,000.11" takes a **Field size** of 12.

  > ⓘ **Note:** Comma separators are stripped, so "1,000,000.11" is displayed as "1000000.11".

- **Decimal positions** — This is the number of digits that are saved after the decimal point.

  > ⓘ **Note:** Rounding is applied if you type more digits than specified. For example, if you set **Decimal positions** to 2, then "55.756" will be saved as "55.76".

- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Sequence

Sequence Group fields assign a unique number to each associated entity. However, please note that custom field sequence numbers are NOT modifiable. The sequencing continues even if a record gets deleted. For example, if a Sequence custom field is associated with projects, and if there is a 100, 101, 102, and 104, chances are that project 103 was deleted. Sequence Group fields are applied by going to the associated entity, one-by-one in the desired order, and then saving the entity's form.

Sequence Group fields can be used for both Summary and Detailed Reports. However, you cannot summarize or filter data, but only add reporting details. For example, you could set a Project Number that could later be used in Detail Reports.

- **Next sequence number** — Enter the starting value for the sequence number.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Text

Text fields store text values up to a maximum of 250 characters. Text fields can be used for both Summary and Detail Reports. However they cannot be used to summarize or filter data, only to add reporting details. For example, you could set a SIC Code on the customer that could later be used in Detail Reports.

- **Field size** — This controls the visible size of the text field displayed next to the drop-down list. The value is the number of characters visible to the user at one time.

- **Max data length** — This is the maximum number of characters a user can type into the text field.

- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

- **Unique** — If you check this box, a unique value must be entered in the field to be able to save the form.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Text Area

Text Area fields store lengthy text values. Text fields can be used for both Summary and Detail Reports. However, you cannot summarize or filter data. You can only add reporting details. For example, you could set a Special terms field on the customer that could later be used in Detail Reports.

- **Field width** — This controls the width of the text area . The value is the number of characters visible to the user at one time.
- **Rows** — This controls the height of the text area . The value is the number of rows of text visible to the user at one time.
- **Required** — If checked the field is required on the form and the form cannot to be saved without supplying a value.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

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URL

Project Statement of Work
SOW   > Edit

URL fields are used to define clickable hyperlinks that enrich OpenAir forms with links to both internal OpenAir documents and external resources available on a customer's intranet or the internet as required. For example, a user can create a link from a project to its Statement of Work document stored in an OpenAir workspace by specifying the Direct URL.

- **URL** — This is the default URL to use. The user can change this if they have access to edit the custom field.

- **Link name** — This is the default text to display that when clicked opens the URL specified. The user can change this if they have access to edit the custom field.

- **Action** — This determines how the URL is opened when the link name is clicked.

See Creating and Modifying Custom Fields for more details.

For the full list of types, see Custom Field Types.

Entities and Forms

The following table shows on which form you will find the custom field created for each entity. You will also find custom fields available in List Views.

> **ⓘ Note:** OpenAir can have its terminology customized and features selected by switch. Your list of entities and forms may differ from the following table.

Entity	Form
Global — Action item	Projects > [Project] > Action items
Global — Charge	Invoices > Charges
Global — Client	Administration > Global Settings > Clients
Global — Contact	Administration > Global Settings > Contacts
Global — Cost center	Administration > Global Settings > Cost centers
Global — Department	Administration > Global Settings > Departments
Global — Employee	Administration > Global Settings > Employees
Global — Exp report	Expenses > Exp reports [Exp report] > Properties
Global — Expense item	Administration > Global Settings > Application Settings > Invoices Settings > Expense items
Global — Invoice	Invoices > Invoices > [Invoice] > Properties
Global — Job code	Administration > Global Settings > Job codes
Global — Payment	Invoices > Invoices > [Invoice] > Payments
Global — Payment terms	Administration > Application Settings > Invoices Settings > Payment terms
Global — Payment type	Administration > Application Settings > Expenses Settings > Payment types
Global — Project	Projects > Projects > [Project] > Properties
Global — Receipt	Expenses > Exp reports [Exp report] > Receipts
Global — Reimbursement	Expenses > Exp reports [Exp report] > Reimbursements
Global — Service	Administration > Application Settings > Invoices Settings > Services
Global — Service 1 line	Administration > Application Settings > Projects Settings > Service 1 lines
Global — Service 2 line	Administration > Application Settings > Projects Settings > Service 2 lines
Global — Service 3 line	Administration > Application Settings > Projects Settings > Service 3 lines
Global — Service 4 line	Administration > Application Settings > Projects Settings > Service 4 lines
Global — Service 5 line	Administration > Application Settings > Projects Settings > Service 5 lines
Global — Tax location	Administration > Global Settings > Tax locations

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Entity	Form
Global — Vendor	Administration > Application Settings > Expenses Settings > Vendors
Invoice — Agreement	Administration > Application Settings > Invoice Settings > Agreements
Invoice — Customer PO	Administration > Application Settings > Invoice Settings > Customer POs
Projects — Action item	Projects > [Project] > Action items
Projects — Billing rule	Projects > [Project] > Financials > Billing
Projects — Phase	Projects > [Project] > Phases/Tasks
Projects — Project stage	Administration > Application Settings > Projects Settings > Project stages
Projects — Project task type	Administration > Application Settings > Projects Settings > Task types
Projects — Recognition rule	Projects > [Project] > Financials > Recognition > Rules
Projects — Recognition transaction	Projects > [Project] > Financials > Recognition > Transactions
Projects — Revenue stage	Administration > Application Settings > Invoices Setting > Revenue stages
Projects — Task	Projects > Tasks
Projects — Task assignment	Projects > Tasks
Purchases — Accounts payable location	Administration > Application Settings > Purchases Settings > Accounts payable locations
Purchases — Carrier	Administration > Application Settings > Purchases Settings > Carriers
Purchases — Fulfillment	Purchases > Fulfillment > Fulfillments
Purchases — Manufacturer	Administration > Application Settings > Purchases Settings > Manufacturers
Purchases — PO	Purchases > POs > [PO] > Edit
Purchases — Product	Administration > Application Settings > Purchases Settings > Products
Purchases — Purchase item	Purchases > [Purchase request] > Purchases items
Purchases — Purchase request	Purchases > [Purchase request] > Edit
Purchases — Purchaser	Administration > Application Settings > Purchases Settings > Purchasers
Purchases — Receiving location	Administration > Application Settings > Purchases Settings > Receiving locations
Purchases — Request item	Purchases > Purchases Requests > Request items
Resources — Booking	Resources > Bookings
Resources — Booking type	Administration > Application Settings > Resources Settings > Booking types
Timesheets — Payroll type	Administration > Application Settings > Timesheets Settings > Payroll types

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Entity	Form
Timesheets — Time entry	Timesheets > Time entries
Timesheets — Time off request	Timesheets > Time off requests > [Time off request] > Edit time off request
Timesheets — Time type	Administration > Application Settings > Timesheets Settings > Time types
Timesheets — Timesheet	Timesheets > Timesheet > [Timesheet] > Edit time off request
Workspaces — Discussion	Workspaces > Discussions
Workspaces — Document/Folder	Workspaces > Documents
Workspaces — Workspace	Workspaces > Workspaces

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Form Permissions

OpenAir allows you to control entity forms using the **Tips > Modify the form permissions** link.

Modify the form permissions has the following sections:

- General permissions — Allow access control to Delete and Save buttons according to a user role.
- Field settings — Allow access to and control of fields within the associated entity form.
- Hidden divider sections — Allow sections within the entity form to be hidden according to a user role.
- Permission rules — Dynamically control fields on a form
- Text field length — Set the maximum length of text fields on a form.
- Form options— Set form level permissions.
- Form message — Display a message on a form.

Internal Switches

The following **Internal Switches** affect **Modify the form permissions**:

- **Use form permission setting for "Ready for recognition" checkbox on task list** — Makes 'Ready for recognition' checkbox on Projects> Tasks (Pending/ Completed/ All) obey form permissions.
- **Separate phase and task form permissions** — Enable this setting to allow for a separate set of form permissions for tasks and phases.
- **Enable divider section hiding in Form Permissions** — Allows hiding of entire sections in forms separated by dividers. See Hidden divider sections.
- **Enable field text length settings in Form Permissions** — Text fields can be limited in length using form permissions. See Text field length.

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■ **Enable form rules in Form Permissions** — Enable this setting to add an additional section, "Form rules" to form permissions. Form rules can be used to show/hide/require/make read-only/hide and clear form fields based on the selection in a second field. See Permission rules.

> ⓘ **Note:** Professional Services set the internal switches when your NetSuite OpenAir account is configured. Your administrator can create a support ticket to OpenAir Support and request that a switch be enabled in your account.

General permissions

General Permissions allow access control to Delete and Save buttons according to a user role. You may select check boxes for each role to enable the following: Disable the Delete button and Disable the Save button. These General Permission settings are universal for the form's associated entity.

Field settings

Field Settings within Form Permissions allow access to and control of fields within the associated entity form. Field level settings are set based on a user's role. These Field Settings are universal for the form's associated entity.

The field setting options include:

■ **REQ** — Required on form. User must enter a value.

■ **RO** — Read Only on form. Entry is not allowed.

■ **Hide** — Hide from form. Field does not display on form.

■ **R-RO** — Read Only for system required fields.

■ **R-Hide** — Hide from form for system required fields.

> (i) **Note:** If fields are controlled using Field Settings or a switch-based **field is required** option, those fields are not able to be controlled by Permission Rules. Field settings and switches override Permission Rules.

Hidden divider sections

Hidden divider sections allow entire sections within the entity form to be hidden based on the role of the user. Divider sections can be standard or custom. Sections are defined as a grouping of fields. Hiding divider sections includes both the fields and the section title.

> ⚠️ **Important:** You need to have the **Enable divider section hiding in Form Permissions** switch enable to see this section.

Permission rules

Permission rules allow administrators to conditionally control which fields they capture on many entity forms. Selection of field values can dynamically control other fields on a form. You can apply this functionality to both standard fields and custom fields. When a field is selected on a form, it can prompt an action on other fields.

Actions include the following:

- **Show** — Make a field visible on the form.
- **Hide** — Hide the field.
- **Read Only** — Make the field visible but prevent any edits.
- **Required** — Raise an error preventing the form from saving if this field does not have a value.
- **Hide and Clear — Hide the field and clear its content.**
- **Limit Values — Creates the limit values multiple selection section for completion.**

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For example, a custom field on a User Demographic form called User Type classifies users as an employee or contractor. If a contractor value is chosen, then a Vendor name field becomes visible and required so contractor data can be entered.

> ⚠️ **Important:** You need to have the **Enable form rules in Form Permissions** switch enable to see this section.

Defining Form Permission Rules

Form permission rules can be set to display custom error messages. Messages appear at the top of the form and are color coded according to the **Severity of custom message** setting.

To create Permission Rules

1. Click on the Tips > Modify the form permissions link for the required form.
2. Scroll to Permission rules. Click the Create link.
3. Enter a Rule name.
4. Define the conditions for the rule. Multiple conditions may be required to create the rule.

> ℹ️ **Note:** Standard fields, custom fields, and user roles are options within the conditions.

5. Set the Perform action:

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- **Show** — Make a field visible on the form.
- **Hide** — Hide the field.
- **Read Only** — Make the field visible but prevent any edits.
- **Required** — Raise an error preventing the form from saving if this field does not have a value.
- **Hide and Clear — Hide the field and clear its content.**
- **Limit Values — Creates the limit values multiple selection section for completion. See** Limit value lists.

6. Set the Selected fields for the perform action. Multiple fields may be selected based on the condition.
7. Set any required custom message. See Custom event messaging.
8. Click Save.

> **ⓘ Note:** If fields are controlled using Field Settings or a switch-based field is required option, those fields are not able to be controlled by Permission Rules. Field settings and switches override Permission Rules. If a field is controlled with a Field Setting, it cannot be additionally controlled by a Permission Rule. It can, however, be included in the condition part of a rule.

Query related data

Form permission rules can be created based on the relationship between fields. When defining a form permission rule, you can now choose to query related data for the rules value on the right hand side (either choose to populate the static field or choose to look up a related field).

Limit value lists

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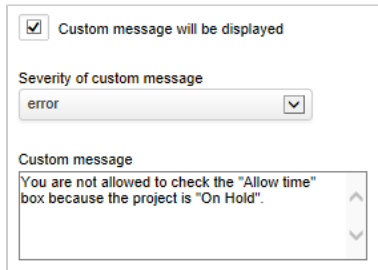
Form permission rules can be created to limit the values displayed in a list on the form. You can restrict the values displayed for a field based on the selection of another field.

Custom event messaging

Form permission rules can be set to display custom error messages. Messages appear at the top of the form and are color coded according to the Severity of custom message setting.

To define a custom message:

1. Select the **Custom message will be displayed** check box.

   > ⓘ **Note:** If not selected the message definition is saved but no message is displayed.
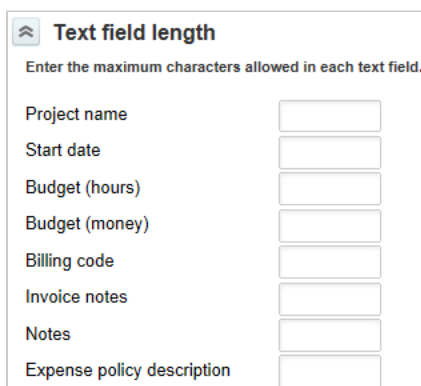
2. Select **Severity of custom message** from the drop-down list.

   > ⓘ **Note:** These setting only affect the appearance of the message. If you select "error" the message will be displayed in red to look like an error but will not prevent the form from saving.

3. Enter the **Custom message** to display.

4. Click Save.

See also Custom Messages.

Text field length

This feature shows you the list of fields that can have a maximum character length set, and lets you to set the maximum lengths. If you leave a field blank then the maximum database length for the field is applied.

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> **Note:** If you specify a maximum length greater than the length allowed in the database then your maximum value will be ignored and the database maximum for the field applied.

The new text field length maximum is applied when creating a new form and modifying an existing form.

> **Note:** If you have an existing value that is longer than the new **Text field length** then the existing length of the value will be treated as the maximum length while the form is being modified.

> **Important:** You need to have the **Enable field text length settings in Form Permissions** switch enabled to see this section.

Form options

The following form level permissions can be set:

- **Display "Save & create another" button at top** — Select this option to display the **SAVE & CREATE ANOTHER** button when create a new entity.

  > **Note:** This behavior can be overridden by the **Add "Save & create another" button to the top right of forms** company switch under Administration > Global Settings > [Display] Interface : Display.

- **Display Custom Fields before form field** — This option determines where on the form the custom fields will be positioned in relation to the standard form fields. The **[Default]** setting will place the custom fields at the bottom of the form. You can also select **[Top]** or specify a field to position the custom fields after.

- **Disable divider before Custom Fields** — This option will disable the displaying of the divider.

- **Fields which maintain value on "Save & create another** — This option allows you to select the fields that will be copied forward when using the "Save & create another" feature.

Form message

Form messages can be displayed either at the top of the form or to the right of the form at the top.

The message can be simple text or may use HTML formatting.

- Example of HTML formatting


```
<p style="font-family:arial;color:green;font-size:20px;">This project must be closed by year en
d.</p>
```

- Example of an information message box


```
<span class="message blockMessage informationMessage">This project must be closed by year end.<
/span>
```

- Example of a warning message box


```
<span class="message blockMessage warningMessage">This project must be closed by year end.</spa
n>
```

- Example of an error message box

This project must be closed by year end.

```
<span class="message blockMessage errorMessage">This project must be closed by year end.</span>
```

> **Note:** This will just format the text to look like an error message. It will not stop the form from being saved.

> **Important:** It is possible to use this feature to run client side script to modify form behavior. This approach is not recommended and your scripts may fail to work with future releases of OpenAir.

Notifications

The administrator of OpenAir can configure the automatic sending of email notifications to designated users based on various events.

Enable administration of notifications in the following application settings:

- Expenses Notifications
- Invoices Notifications
- Projects Notifications
- Purchases Notifications
- Resources Notifications
- Timesheets Notifications

Suppressing Email Notification

Email notifications are sent automatically for many different events in OpenAir. These notifications can be turned off for most types of notification.

> ℹ **Note:** There is no way to turn off email notifications that a timesheet or expense report is waiting your approval.

Users can selectively choose to suppress email notifications when they make changes to bookings, issues, tasks, and projects. For example, a user may not wish for a minor modification to trigger an email. To suppress email notifications, when in the edit form of the associated entity, select a check box indicating that email notification is suppressed. An email will not be sent to the notification list. Set up a custom field in each entity for the suppress email notification option and it displays in the associated edit forms. Additionally, users can send notifications to additional email addresses for OpenAir and non-OpenAir users. These users may include those who may not routinely be notified of task or issue changes. Enter the email addresses in the text box for "E-mail addresses to cc" on the Edit tasks and Create or Edit issues forms. This text box displays once the feature is enabled.

> ✔ **Tip:** If the concern is that multiple emails are received prompting to approve timesheets (or expenses, etc.), create a rule in your email program to funnel the approval notification emails into a separate folder.

Internal Switches

Enable administration of notifications in the following application settings

Notifications are enabled for each module by the **Enable administration of notifications in the following application settings:** internal switch. This is a multiple selection switch supporting the following values:

- **Exp reports** — See Expenses Notifications.

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- **Invoices** — See Invoices Notifications.
- **Projects** — See Projects Notifications.
- **Purchases** — See Purchases Notifications.
- **Resources** — See Resources Notifications.
- **Timesheets** — See Timesheets Notifications.

Suppress submission and approval standard system mail for

Suppress submission and approval standard system mail for:

- Authorization
- Booking request
- Exp report
- Invoice
- PO
- Purchase request
- Revenue container
- Time off request

Suppress standard system mail for

Suppress standard system mail for:

- Project manager changes on project
- Created, changed or deleted project task
- Created, changed or deleted booking
- Assignment and status changes to action items
- Project stage bulk changes

Disable email templates for

Disable email templates for:

- Action request
- Authorization
- Booking
- Booking request
- Invoice
- Project
- Project task
- Revenue container

- Time off request

Enable cc email notification control at task level

See Add option to selectively suppress email notification via named (suppress_email_notification_[number]) custom field for details.

Enable cc email notification control at action item level

See Add option to selectively suppress email notification via named (suppress_email_notification_[number]) custom field for details.

Add option to selectively suppress email notification via named (suppress_email_notification_[number]) custom field

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

Set up a custom field in each entity for the suppress email notification option and it displays in the associated edit forms. Additionally, users can send notifications to additional email addresses for OpenAir and non-OpenAir users. These users may include those who may not routinely be notified of task or issue changes. Enter the email addresses in the text box for "E-mail addresses to cc" on the Edit tasks and Create or Edit issues forms. This text box displays once the feature is enabled.

To suppress an email notification or add addresses to a notification:

1. Users with required role privileges navigate to Account > Company > Custom Fields > Create > Checkbox Field. Note: The custom field must be a Checkbox Field.

2. Type the Field name: "Suppress_email_notification_1". Note: Because each custom field's Field name needs to be unique, it is required that you name the custom field "suppress_email_notification_" followed by a different number for each entity in which you would like the action to be active.

3. Check the "Active" check box, type a description, associate it with an entity using the drop-down list, type the display name and hint, select its display Position if there are multiple custom fields, and click Save.

4. To view the new custom field and to view the text box for adding email addresses, select the module and name of the entity with which you associate the custom field. Note: The "E-mail addresses to cc" text box only displays in the Projects module on the Edit task and Create or Edit issue forms.

5. Click on the edit function to display the edit form.

6. To keep a notification from being sent, select the check box for "Suppress email notification."

7. To send email notifications to other email addresses, type them in the "E-mail addresses to cc" text box under Notifications. Separate multiple email addresses with a comma.

8. Click Save. If email notifications were suppressed, they will NOT be sent. If additional email addresses were entered, notifications will be sent.

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> **Note:** The "Suppress email notification" box will always remain checked until users uncheck it manually.

Defining Notifications

Notification forms have the following sections:

- Notification name
- Send a notification
- Notify
- Email message
- Other

Notification name

You have the option to name the notification. The **Rule name** will be blank if you do not provide a name.

Send a notification

This section determines on what event the email is to be sent.

You can either select a simple event, for example "When any project is created", or a conditional event, e.g. "When these conditions are met…".

OpenAir

When a conditional event is selected addition fields are displayed.

> (i) **Note:** To assist you in completing the condition, the fields are displayed as needed. For example, working from left to right, you need to select a value in the first drop-down list before the next drop-down list is displayed.

To define an email for a a conditional event

1. Select the conditional event, e.g. **When these conditions are met...**, option from the drop-down list.

   Additional fields display to specify the condition.

2. Select the field to base the condition on.

3. Select the comparison operator.

   > (i) **Note:** The comparison option is determined by the selected field.

4. Select the comparison values.

   > (i) **Note:** The comparison option is determined by the selected field. Some fields use a multiple selection drop-down and some field do not require a comparison at all. Fields with a very large list of values support advanced search.

Notify

This section determines to which email addresses the message will be sent.

To define the notify section:

1. Select one or more named users and / or meta values e.g. [Approver].

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> **(i) Note:** An **Email** address is a required field for every user.

2. You can specify additional external email addresses.

> **(i) Note:** Separate multiple email addresses with a comma.

3. Select to either send a single email (with all recipients on the **To** line) or an individual email to each recipient.

Email message

Enter the subject and body for the email message. You can use Placeholders to create a dynamic email message.

Other

The notification is ignored if **Active notification** is left unchecked. This can be useful when creating a notification or temporarily disabling a notification.

There is also an option to not send approval requested notifications if auto-approved for **approval requested** notifications.

Placeholders

Placeholders are variables you can place into the body of an email message. The placeholder is then replaced with a value read from the OpenAir database when the email is sent. A placeholder consists of a field name surround by **%%** characters, e.g. **%%name%%**.

OpenAir

To add a placeholder:

1. Select the **field** name from the drop-down list.
2. Click the **Paste** link.
3. The placeholder variable is appended to the text in the **Email body**.

Expenses Notifications

Administration > Application Settings > Expenses Settings > Notifications

Expenses email Notifications can be configured to inform a manager that an expense report is waiting approval or to inform a user that an expense report has been approved or rejected.

A user can be sent an email notification when an expense report is approved as well as for expense reports and authorizations that are submitted or approved by proxy. An email notification can also be sent when specified conditions are met. Your administrator designates who receives notifications and composes the actual email notification message.

Expenses Notifications:

- When any exp report is approved

- When these conditions are met ...

> ⚠️ **Important:** You need to have the **Enable administration of notifications in the following application settings: (Exp reports)** switch selected to enable **Expenses Notifications**.

Invoices Notifications

Administration > Application Settings > Invoices Settings > Notifications

A user can be sent an email notification when an invoice is approved, submitted, rejected, and approval requested as well as for revenue containers that are approved, submitted, rejected, and approval requested. An email notification can also be sent specified conditions are met or when approval is by proxy. Your administrator designates who receives notifications and composes the actual email notification message.

Invoices Notifications:

- When any invoice is approved
- When these conditions are met ...

> ⚠️ **Important:** You need to have the **Enable administration of notifications in the following application settings: (Invoices)** switch selected to enable **Invoices Notifications**.

Projects Notifications

Administration > Application Settings > Projects Settings > Notifications

Projects Notifications:

- When any project is created
- When these conditions are met …

You can configure the automatic sending of email notifications to designated users as projects are created or moved into various Project Stages.

- **CC address for new project manager notification:** Add addresses to CC on e-mail notification when project owner is changed
- **Enable cc email notification control at task level:** Enable this setting to add an additional option on the "edit task" form to control cc email notifications. By default controlled at the project level (edit project form).

- **Unify task emails for one event notification into a single email digest for cc email recipients:** When a single action on a task generates multiple similar emails (i.e.. assigning several users), a single email will be sent listing all, rather than sending one email for each. The email headers for the individual emails are maintained.

- **Enable cc email notification control at action item level:** Enable this setting to add an additional option on the "edit action item" form to control cc email notifications. By default controlled at the project level (edit project form).

- **Enable task successor assignee notification custom field feature:** Enable this feature and create a custom field checkbox on projects called notify_task_complete_successor_assignees. When checked, assignees in that project will be notified when all predecessor tasks to theirs are closed or marked 100% complete.

> ⚠️ **Important:** You need to have the **Enable administration of notifications in the following application settings: (Projects)** switch selected to enable **Projects Notifications**.

Purchases Notifications

Administration > Application Settings > Purchases Settings > Notifications

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Purchases Notifications:

- When any PO is approved
- When these conditions are met ...

Purchases email Notifications can be configured to inform a manager that a purchase request is waiting approval or to inform a user that an expense report has been approved or rejected.

A user can be sent an email notification when a PO is approved, submitted, rejected, or when an approval is requested as well as when a purchase request is approved, submitted, rejected, or when an approval is requested. A user can be sent an email notification involving a specific vendor as well as for a PO submitted and approved by proxy. An email notification can also be sent when specified conditions are met. Your administrator designates who receives the email notification and composes the actual email notification message.

> ⚠️ **Important:** You need to have the **Enable administration of notifications in the following application settings: (Purchases)** switch selected to enable **Purchases Notifications**.

Resources Notifications

OpenAir

Administration > Application Settings > Resources Settings > Notifications

Resources Notifications:

- When any booking is created
- When these conditions are met ...

A user can be sent an email notification when a booking is created, modified, or deleted. A user can also be sent an email notification when a booking request is approved, submitted, rejected, or approval is requested. As with other types of OpenAir notifications, an email notification can also be sent when specified conditions are met such as a specific booking type or Customer : Project. Your administrator designates who receives the email notification and composes the actual email notification message.

- **Notify booked resource when a booking is added, modified, or deleted:** When you activate this option, OpenAir creates email notifications and sends them to any resource who has a booking entry created, modified, or deleted.

  > (i) **Note:** Notifications are sent for each booking entry. When using the booking worksheet, entries into each column creates individual booking entries, which causes an email notification to be sent for each booking.

- **Prepend 'OpenAir' on the subject line of booking notifications emails:** The email subject for booking notifications defaults to New Booking Created. Selecting this option prepends OpenAir to the subject line to make it clear to the user that the email is coming from the OpenAir system. You can customize the booking notification subject and email body per your company's needs.

- **Notify manager of booked resource when a booking is added, modified, or deleted:** If you activate this option, OpenAir creates email notifications to a resource's manager for each booking entry created, modified, and deleted.

> **Note:** Notifications are sent for each booking entry. When using the booking worksheet, entries into each column creates individual booking entries, which causes an email notification to be sent for each booking. If a user's Demographic form does not have a Manager identified, emails are not generated.

> ⚠ **Important:** You need to have the **Enable administration of notifications in the following application settings: (Resources)** switch selected to enable **Resources Notifications**.

Timesheets Notifications

Administration > Timesheets Settings > Expenses Settings > Notifications

Timesheets Notifications

- When any timesheet is approved
- When these conditions are met …

Timesheet email Notifications can be configured to inform a manager that a timesheet is waiting approval or to inform a user that a timesheet has been approved or rejected.

A user can be sent an email notification when any timesheet is submitted and approved as well as for timesheets submitted or approved by proxy. An email notification can also be sent when specified conditions are met. The administrator designates who receives the email notification and composes the actual email notification message.

> ⚠️ **Important:** You need to have the **Enable administration of notifications in the following application settings: (Timesheets)** switch selected to enable **Timesheets Notifications**.

Approval Processes

The approving of items in OpenAir can be setup at the user or project level. User Approvals are setup by the administrator when a new user is created and establish the default approval procedure. Project Approvals override the default to specify the procedure required for items for a particular project.

> ⓘ **Note:** User approvals can be set on mass using the Department Approvals feature.

An approver for a specific item can be set to:

- A named user.
- A meta value user e.g., [Project owner] or user's [Manager].
- A named Approval Process.

User Approvals

Administration > Global Settings > Users > [User]

The default approver for a user's Timesheets, Time off requests, Expense reports, Purchase requests, and POs are set when the user account is created by the administrator.

The administrator can assign an approver as:

- [Self approver] — no approval is required.
- [Manager] — approved by the user's manager.
- [Manager's manager] — approved by the user's manager's manager.
- A named user setup in the OpenAir.
- A named Approval Process.

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> **Note:** User approvals can be set on mass using the Department Approvals feature.

Project Approvals

Projects > [Project] > Properties

Project approvals override the default User Approvals to specify the procedure required for items for a particular project.

The administrator or project manager can assign an approver as:

- [Manager] — approved by the user's manager.
- [Manager's manager] — approved by the user's manager's manager.
- [Self approver] — no approval is required.
- [Project manager] — approved by the project manager set for the project.
- [Client owner] — approved by the client owner set for the client the project is for.
- A named Approval Process.
- A named user setup in the OpenAir.

> **ⓘ** **Note:** Project approvals are enabled from the Approval Options.

Department Approvals

Administration > Global Settings > Departments > [Department] > Approvals

User approvers can be set by function at a department level. The functions listed include: Timesheets Approver, Expenses Approver, Authorizations Approver, Proposal Approver, Purchase Request Approver, and PO Approver, provided these functions are enabled in your NetSuite OpenAir environment, see Approval Options. Approvers can be assigned to the department head, to a generic such as Manager or to an Approval Process.

The administrator can assign an approver as:

- [Manager] — approved by the user's manager.
- [Manager's manager] — approved by the user's manager's manager.
- [Self approver] — no approval is required.
- A named Approval Process.
- A named user setup in the OpenAir.

Approval Process

Administration > Global Settings > Approval Process

Approval processes are available for use in the following applications: Timesheets, Resources, Projects, Expense reports (including Authorizations), Purchases (purchase requests and POs), Invoices, and Opportunities (proposals).

This functionality provides the ability to create multi-level Approval processes as opposed to a specific named employee or meta value employee e.g., [Project owner] or employee's [Manager]. You can create as many approval processes as your company requires.

In addition, if you have enabled project approval options, the approval processes can be selected for proposals, invoices, and project approvals for timesheets, purchase requests, POs, booking requests, additional project specific approvers. See Approval Options. Project approvals occur first and must be completed before the other approvals can be fulfilled.

> **ⓘ Note:** Approval processes are available in the application settings of several different applications. Any process created in any of the applications settings, i.e., timesheets or expense reports, is available on all approval areas for project or employee level approvals.

To create an Approval Process:

1. Go to Administration > Application Settings > Expenses Settings > Approval processes.
2. Select **New Approval process** from the **Create Button**.
3. Enter the Approval process name. Make this name descriptive if you are creating multiple approval processes in your environment. A number of rows are available to create the approval process.
4. Select the Sequence Number. It indicates the order in which the approvals flow. The sequence number can be changed using the drop-down list.
5. Select the Approver assigned to the sequence number from the drop-down list, either a specific employee or meta value employee such as a [Project owner] or [Manager].

6. When a designated approver is submitter, and self-approval is not allowed, there is an option to select alternate approvers for individual approvers or for the overall approval process.

7. Create **Auto-approve rules** for any approver in the process. They automatically approve items when the value of the parameter meets the criteria specified in the rule.

8. Select the check box for **Can not edit** when you want to prevent the approver from modifying the approval process. This is only applicable if your account is configured to allow approvers to edit expense reports submitted to them.

9. Click Save.

> (i) **Note:** You can edit approval processes to add or alter steps and approvers. The effects take place the next time an employee submits an expense report. Any expense reports submitted prior to the change still holds the prior approval process parameters.

Sequence Number — You can change the sequence number using the drop-down list. More than one approver can have the same sequence number.

A sequence number requires only one approval — The check box for A sequence number requires only one approval is useful when you would like to have two or more approvers at the same level/sequence number, but require only one of them to approve the item before it is passed on to the next level approver.

Assign after — If you assign the same sequence number to several approvers, the **Assign after** field displays to the right of the form. This makes automatic escalations available by putting a number in the **Assign after** field. If approval is not given by the first approver within a certain number of days, the approval request is routed to the subsequent approvers. After approval has been escalated, the first approver may still approve it. The Assign after field is always days after initial submission, and it does not count from a previous escalation if multiple approvers are added in the same sequence number.

Approval Options

Administration > Global Settings > Approval Options

Enable approvals for proposals

If this feature is enabled approvals can be configured for proposals at the user level.

This enables the submit/approve process for proposals.

Enable approvals for invoices

If this feature is enabled approvals can be configured for invoices at the user and client levels.

Enable project approvals for invoices

If this feature is enabled approvals can be configured for invoices at the project level.

Enable project approvals for timesheets

If this feature is enabled approvals can be configured for timesheets at the project level.

This enables the "Project timesheets are approved by" drop-down list box on the "New/Edit Project" dialog box.

Enable project approvals for purchase requests

If this feature is enabled approvals can be configured for purchase requests at the project level.

This enables the "Project purchase requests approved by" drop-down list box on the "New/Edit Project" dialog box.

Enable project approvals for POs

If this feature is enabled approvals can be configured for POs at the project level.

This enables the "Project POs approved by" drop-down list box on the "New/Edit Project" dialog box.

Enable project approvals for booking requests

If this feature is enabled approvals can be configured for booking requests at the project level.

Enable additional project specific approvers

If this feature is enabled, you will see 3 new project specific approver dropdowns on the "edit project" form. You can create an approval process using project specific approved metavalues to be sourced from the project selections.

If a project specific approver metavalue is included in an approval process at the user level, the transaction will be auto-approved. Similarly, if a project specific approver does not exist on a specific project, that level of approval will be automatic.

Display the time on the approval history

If this feature is enabled submit, approve, and reject times will appear in the approval history.

Enable project approvals for expense reports

If this feature is enabled approvals can be configured for expense reports at the project level.

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This enables the "Project expense reports are approved by" drop-down list box on the "New/Edit Project" dialog box.

Enable project approvals for expense authorizations

If this feature is enabled approvals can be configured for expense authorizations at the project level.

This enables the "Project expense authorizations approved by" drop-down list box on the "New/Edit Project" dialog box.