



Overview & Objective – The purpose of this O M & U is to demonstrate access to the OpenAir Saved Reports. Saved Reports are easily accessed after logging onto the Intacct Home Page (Account. Console).

Note: As presented, these procedures do not necessarily fit the business rules/requirements of every company using OpenAir. In addition, certain terminology presented provides only a sampling of possible names that could be applied.

Logging Onto The Intacct Home Page – To log onto Intacct navigate as follows:

1. Go to the URL: www.Intacct.com
2. In the upper right hand corner of the screen click the “Secure Login” link.
3. The following login information is then required:

Company ID:
User ID:
Password:

...You should request IDs and initial passwords from your NDH Group Account Executive

Initial Navigation – To navigate to OpenAir Saved Reports Screen (from the Intacct Accounting Console):

1. Go to the Applications dropdown (upper right hand corner)
2. Select the Professional Services Automation Module
3. Once in the PSA Module go to the Activities dropdown (upper left hand corner)
4. Select the Activity “Dashboard”
 - Click on the <Reports> tab
 - Click on the <<Saved Reports>> sub tab

OPENAIR REPORT FUNCTIONS – Once in the Saved Reports Screen the following functions are available:

- **Run (Circular Icon)** – Click the Run Icon to run the report as it is presently setup.
- **Download (Page-Arrow Icon)** – Click the Download Icon to export the report to Excel.
- **Modify (Pencil Icon)*** – Click the Modify Icon to Modify the report (beyond scope of this O M & U).
- **Delete (Trashcan Icon)**** – Click the Delete Icon to delete the report.
- **Share (Page L-R Arrow Icon)**** – Click the Share Icon to give other Users report access.
- **Additional Notes:**
 - ***Authorship of Report** – Function requires original authorship of report to perform.
 - ****Modification of Saved Reports** – OpenAir Saved Reports are extensively modifiable. Changes to settings, include customizing time periods, values, sub-totals, filters, detail fields, and the method of calculating utilization.

CURRENT OPENAIR REPORTS – For initial use the following reports are available:

⇒ Please consult your NDH Account Representative for further information.

Further Instruction & Use – For further information regarding Accessing Saved Reports contact your Account Executive or call The NDH Group, Ltd. at 312.461.0505.