OpenAir	OpenAir Management & Use: Filter Set Setup & Use The NDH Group, Ltd. July, 2006

Overview & Objective – The purpose of this O M & U is to provide guidance on Filter Set Setup & Use. Company-wide Filter Sets are created for managing user access and permissions.

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.

Initial Navigation – Navigation for each function is listed separately below.

FILTER SET SETUP – Filter Sets are usually created as an implementation commences or to accommodate additional user groups. In some instances, they're added to manage access to additional departments/verticals. Changes to Filter Sets are generally not required as users, projects, or bookings are added. ***Access to Filter Sets is accomplished during User setup (See "OpenAir User Setup").***

ADDING A FILTER SET – This procedure outlines how to setup a new Filter Set:

1. Go to the Applications dropdown (upper right hand corner)
2. Select the Professional Service Automation Module
3. Go to the Activities dropdown (upper left hand corner)
4. Select the Activity "Dashboard"

I. Click on the **<Account>** tab
II. Click on the "Filter Set" link in the Account Data grouping
III. Access the "New Entries" dropdown (upper right hand corner)
IV. Select "Filter Set"
V. The form "New Filter Set" should appear…from here the following information is required:

- **Filter Set Name** – Add the name of the Filter Set (usually comports with the name of the control group)
- **Notes** – Any additional notes about the Filter Set
- **Make This the Default Filter Set for New and Imported Users** – This check-box should be marked for the Filter Set which services the majority of new users.

VI. Click on the **<<User Filter Set>>** sub-tab. It is NOT necessary to alter the filter sets to accommodate or add new Users; this is completed within the **User** Filter Set and NOT here (see New User Setup).

VII. Click on the **<<Access Control>>** sub-tab. The following Access setting are provided for *generic users*:

- **Client Access** – Should be set to **All Clients**
- **Project Access** – Should be set to:
  - Access to Booked Projects
  - Overhead [Company Overhead Accounts]
- **Project Stage Access** – Should be set to:
  - Pre-Contract
  - In Progress
- **Service Access** – Should be set to **All Services**
- **User Access** – Should be set to **MySelf**
- **Expense Item Access** – Should be set to **All Expense Items**
- **Time Type Access** – Should be set to **All Time Types**
- **Time Bill Stage Access** – Should be set to **All TimeBill Stages**
- **Booking Type Access** – Should be set to **All Booking Types**

⇨ This completes the procedure for the setup of Filter Sets (*for generic users*).

Note: As outlined, Filter Sets do not appear to be overly discriminatory or provide any real access control. Specificity is provided for in other places including Bookings, Projects, and User setup. In addition, settings outlined here are oriented to *generic users* –mostly non-managerial users who are granted general access.

FILTER SETS – This procedure outlines how to apply Filter Sets to a user OR reapply a Filter Set to a user whose changed Filter Set status. These procedures are normally handled as the user is setup (See “OpenAir User Setup”)

1. Go to the Applications dropdown (upper right hand corner)
2. Select the Professional Service Automation Module
3. Go to the Activities dropdown (upper left hand corner)
4. Select the Activity “Dashboard”

I. Click on the <Account> tab
II. Click on the “Users” link in the Account Data grouping
III. Drill down on the specific user you want to add/change a filter set(s)
IV. Click on the <<Filter Sets>> sub-tab
V. Add the appropriate Filter Set(s) for the user. By assigning a primary Filter Set (see below) access control for the user will be limited.

⇨ This completes the procedure for applying a Filter Set to a user.

ASSIGNING A PRIMARY FILTER SET – This procedure outlines how to apply a primary Filter Set to a user. This will narrow limit a user’s choice of projects to enter time against and access to the system. For additional procedures on how the user can change access between Filter Sets without administrative action see below procedures “Allowing the User to Change Filter Sets.”

1. Go to the Applications dropdown (upper right hand corner)
2. Select the Professional Service Automation Module
3. Go to the Activities dropdown (upper left hand corner)
4. Select the Activity “Dashboard”

I. Click on the <Account> tab
II. Click on the “Users” link in the Account Data grouping
III. Drill down on the specific user you want to add/change a filter set(s)
IV. Click on the <<Demographic >> sub-tab
V. Scroll down to the “Primary Filter Set” dropdown. Apply the Filter Set for which the user will be primarily entering time against and click, “Save” at the bottom right hand corner.

⇨ This completes the procedure for assigning a primary Filter Set for a user.

ALLOWING THE USER TO CHANGE FILTER SETS – A primary Filter Set is assigned to each user, but all users CAN access each of the departments/verticals IF required. The following procedure is written as if the user were accessing his/her own session.

I. Go to Business Development Module
II. Go to Dashboard
III. Click on the <My Options> tab
IV. Click on the <<Change Filter Set>> sub-tab
V. Choose the filter set that’s required. Again, this will be a filter set other than the Primary Filter Set that’s been assigned.

⇨ This completes the procedure for a user’s change of Filter Sets.

Further Instruction & Use – For further information regarding Filter Set Setup & Use contact your Account Executive or call The NDH Group, Ltd. at 312.461.0505.