

Overview & Objective – The purpose of this O M & U is to provide guidance on OpenAir User Setup. The procedures outlined here succeed the instructions, “Role Setup.” These procedures must be completed prior to User’s being available in OpenAir for booking or time entry.

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 – To navigate to the OpenAir User Setup Screen (from the Accounting Console):

1. Go to the Applications dropdown (upper right hand corner)
2. Select the Professional Services Automation (PSA) Module
3. Go to the Activities dropdown (upper left hand corner)
4. Select the Activity “Dashboard”
5. Click on the <Account> tab
6. In the Account Data group, Click the “Users” link
7. This will provide a list of all Users that have been setup in Intacct (see “Intacct User Setup”). Drilling down on any User will gain access to the following sub-tabs, which are described below:
 - Demographics
 - Access Control
 - Schedule
 - Job Codes
 - Cost
 - Proxy
 - Filter Sets

USER SETUP – The procedures outlined below (see sub-tabs, which are designated w/ “<< >>”) review the individual setup processes for Users.

<<Demographic>> – From the Demographic Screen the following modifications should be made:

- **Role** – One of the following Roles should assigned according to the System Administrator:
 - User – Provides basic access to OpenAir modules and shared reports
 - Project Manager – Provides access to projects, shared, and company-wide reports
 - Sr. Project Manager – Provides access to billing rates, budgets, and bookings
 - Administrator – Provides universal access to all OpenAir functions
- **Title, Address & Phone** – This information should pullover from Intacct’s Contact setup
- **E-Mail** – This information should pullover from Intacct’s Contact setup. ***E-mail is important!***
- **Manager** – A manager should be selected from names provided in the dropdown.
- **Primary Filter Set** – The selection of a primary filter set will be made in the <<Filter Sets>> sub tab (please see further instructions on “<<Filter Sets>>” below). Therefore, no filter set should be chosen.
- **Timesheets / Schedule / Expense / Authorizations Approvals / Booking Requests** – Each of the approval drop-downs should be set to the **final** approver. Other procedures (See procedures for project creation) specify instructions for **first-level** approvers, which are generally project managers.
- **Week Starts** – The should generally be set to Monday
- **Hourly Rate** – A User’s billing rate can be input for certain forecasted reporting, but **only** one rate can be input; this means the User must have a uniform rate across all projects for the input to be relevant, and forecasted reports to accurately reflect anticipated billings.

<<Demographic>> (setup continued)

- **Email / Optional / Time / Regional Settings** – These can be set by the User in their Preferences screen
- **Dashboard Options** – These can be set by the User in their Preferences screen
- **Timesheet / Expense Options (Non-Managers)** – These check-boxes should be **unmarked, except “Time Sheet Required”**
- **Timesheet / Expense Options (Managers)** – These check-boxes should be **marked**
- **Display Options** – These can be set by the User in their Preferences screen
- **Paychex Employee Number (Custom Field)** – The Paychex employee number field is entered if the custom field for this input has been created. The Paychex number is used for reporting.
- **Base Utilization Hours (Custom Field)** – The base utilization field is entered if the custom field for this input has been created. The utilization number is used for reporting.
- **Filter Set** – This filter set should be left blank so that it appears as “Create”
- **Hierarchies** – Hierarchies should be selected from among those setup by the company

<<Access Control>> – From the Access Control screen the following modifications should be made:

- I. **Module Access** should be set for the User, Project Manager, and Sr. Project Manager Roles:
 - **Role: User** – Module access to My Account, Expenses, Timesheets, and Workspaces.
 - **Role: Project Manager** – Module access to My Account, Expenses, Timesheets, Resources, and Workspaces, Projects.
 - **Role: Sr. Project Manager** – Module access to My Account, Expenses, Timesheets, Projects, Resources, Workspaces, Opportunities
- II. **Exchange Access** should be set for the User, Project Manager, and Sr. Project Manager Roles:
 - **Role: User** – Access to all optional data exchange items
 - **Role: Project Manager** – Access to all optional data exchange items
 - **Role: Sr. Project Manager** – Access to all optional data exchange items

<<Schedule>> – From the Schedule screen the following modifications should be made:

- **Company Work Schedule** – The **default** company work schedule should be selected from those available
- **Radio Button** – “Use the associated company work schedule” should be dotted
- **Exceptions to Work Schedule** – Entry of dates, which range from prior to the initiation of OpenAir system use (start date) to the day prior to a hires start date (end date), should be entered. The number 0 (zero) should be entered in the “Hours to work per day” field.

<<Job Codes>> – For any currently maintained Job Codes, make an applicable selection.

<<Costs>> – Enter the per hour cost of any employee, including any overhead rates applied.

<<Proxy>> – The proxy feature will allow a user to login as the proxied users, with the designated user roles, without going through the normal login process. Granting proxy rights should be used sparingly and generally only in the instances when the user has been assigned a role of Sr. Project Manager or Administrator. To edit proxy rights proceed as follows:

- **Proxied User** – Select the proxied user for whom the current user will have access.
- **User Role** – Select the same user role that the proxied user maintains.

<<Filter Sets>> – Filter Sets should be set according to Roles. Therefore, the following filter sets should be selected or moved to the “Select Filter Sets” pane:

- For Role “User” – Select “User Access” Filter Set
- For Role “Project Manager” or “Sr Project Manager” – Select “Project Manager Access”
- For Role Administrator” – Select “All Access”

⇒ This completes the procedure for OpenAir User setup. The user can now be booked to project.

USER SETUP (ADVANCED) – Resources (users) can be associated with Profiles and Attributes so that searches for Resources can be filtered by numerous criteria or colorations.

Associating Profiles And Attributes W/Resource Attributes – This procedure outlines how to associate Resources with Profiles and Attributes*.

1. Go to the Business Development Module
2. Go to the Activities dropdown (upper left hand corner)
3. Select the Activity “Resources”
4. Click on a User ID
5. Click on the “New Entries” drop down (upper right hand corner) for any new Profile association you wish to create (select a Profile from the drop down)
6. Once the “New Profile” form appears associations with a particular Profile and Attributes of that Profile can be made
7. Click “Save”

⇒ This completes procedures for associating Resources (users) to Profiles and their Attributes

*For first time use an association must be made between a Profile and its Attribute. In order to complete this association click on the Options link (upper right hand corner) of the Resources Screen. A form will be presented that allows the association.

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