

Overview & Objective – The purpose of this O M & U is to provide guidance on booking OpenAir Resources. Bookings must be completed prior to a user entering time against a project; user's who have not been booked to a project will not see the corresponding project in their timesheet grid.

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 Bookings 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 "Resources"
5. Click on the <Bookings> tab

BOOKING RESOURCES (USERS) TO A PROJECT – This procedure outlines how to assign or book resources (users) to specific project(s). Once a resource has been assigned to a specific project the user will be able to log time and expenses against that project.

- I. Access the "New Entries" dropdown (upper right hand corner)
- II. Select "Booking," or "Multiple Booking"
- III. The form "New Booking" should appear...
 - **Resource** – Enter the Resource or User for booking
 - **Client: Project** – Enter the Client: Project for whom the user will be booked to
 - **Start Date** – Enter the first date the user will be entering time against the project
 - **End Date** – Enter a projected end date. This is the date that the user will no longer be required for the project. **Note:** Make sure the end date is sufficient for the project. If the entered end date comes before the project's completion the user will not be able to enter time against the project.
 - **Booked By** – A percent or number of hours must be entered for the Resource. If total hours cannot be determined enter 100% for the "Percent of Time."
 - **Booking Type** – Select either a "Confirmed," or "Pending" status.
 - **Notes** – Enter any notes relevant to the booking
 - **Repeat Booking** – If additional or repeat bookings are required for future timeframe(s) apply the repeat bookings function.

⇒ Click "Save." The Project Resource has now been booked.

BOOKING RESOURCES (ADVANCED) – Once Resources (users) have been booked to a project additional details for those bookings can be considered, including the hours/percentage of time required.

DEFINING TIME AND PERCENTAGE BOOKINGS – This procedure outlines how to book hours or a percentage of time that a resource (user) is required for a project.

1. Go to the Business Development Module
2. Go to the Activities dropdown (upper left hand corner)
3. Select the Activity "Resources"
4. Click the <Bookings> tab

BOOKING RESOURCES ADVANCED (Setup Continued)

...Once in the Bookings page the following views are available:

<<List>> View – Provides a more generic approach to modifying time bookings for a Resources; this view is not as detailed as <<Grid>> view (see below). After clicking on the **Modify icon** for any of the Resources listed the following input should be supplied...

- Start and end dates for a specific project
- Percentage of time allocated to a specific project
- Hours assigned for a specific project

<<Grid>> View – Provides a specific approach to booking Resources that allows the OA Admin to specify hours/percentages booked on a month-by-month basis. Same questions apply as above, but the entry is performed on a month-by-month basis.

<<Chart>> View – Provides a graphical view of the hours and percentage of time a Resource is booked to a project. The output from this view is available once the bookings details (as shown above) are supplied.

⇒ This completes advanced procedures for booking resources.

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