

Overview & Objective – The purpose of this O M & U is to provide guidance on OpenAir Resource Profiles and Attributes. The procedures outlined here precede the instructions, “Resource Quick & Custom Searches.” Defining *Resource Profiles* can help you to search Resources (employees) based on predefined requirements for skills, locations, etc. *Resource Attributes* are created to provide more coloration/specific detail on the depth of the skill set, location, etc., and can be used to enhance searches.

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.

DEFINING RESOURCE PROFILES – This procedure outlines how to define Profiles for your Resources:

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. Go to the **<Account>** tab
 - II. Click on any of the “Resource Profiles” links in the Resources Data Group, which include:
 - Skills
 - Education
 - Locations
 - Job Roles
 - Industries
 - III. Click on the “New Entries” drop-down (upper right hand corner) for any Resource Profile you wish to define (E.G. Select, “Skill,” “Education,” etc.)
 - IV. Define the **profile** by entering a new name.

⇒ Click, “Save.” This completes procedures for defining Resource Profiles.

DEFINING RESOURCE ATTRIBUTES – This procedure outlines how to define Attributes for your Resources:

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. Go to the **<Account>** tab
 - II. Click on the “Attribute Set” link in the Resources Data Group
 - III. Click on the “New Entries” drop down (upper right hand corner) for any new Resource Attribute you wish to define (select, “Attribute Set” from the drop down)
 - IV. Once the “New Attribute Set” form appears provide a “Name” similar to the Profile (E.G. if the Profile name is “Skills” the Attribute should be named “Skills Level”). The “Attribute List” could include:
 - Beginner
 - Intermediate
 - Advanced

⇒ Click, “Save.” This completes procedures for defining Resource Attributes.

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