

Overview & Objective – The purpose of this O M & U is to provide guidance on Resource OpenAir Quick and Custom Searches. The procedures outlined here succeed the instructions, “Resource Profiles & Attributes.” Search allows a user to fully leverage OpenAir’s Booking and Resource capabilities. After Resources have been associated with Profiles and Attributes searches can be filtered by numerous criteria.

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.

PERFORMING QUICK SEARCHES – This procedure outlines how to conduct Quick Searches:

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”
- I. Click on the **<Quick Search>** tab
 - II. Select a search criteria from the upper left hand corner drop-down “Quick Search by:” Typical search criteria could include:
 - o Skills
 - o Certifications
 - o Industry Specialty
 - o Etc.
 - III. The search is complete. The OA Admin or Project Manager can book the Resource to a project (click “Book”) or further research the detailed qualifications of the Resource (click “User ID”).
- ⇒ This completes procedures for Quick Search.

PERFORMING CUSTOM SEARCHES – This procedure outlines how to conduct Custom Searches:

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”
- I. Click on the **<Custom Search>** tab
 - II. Select search criteria based on
 - o Profile Filters
 - o Availability
 - o Resource Type
 - III. Search reports can be arranged according to the items available in the **Detail Field >Edit**
 - IV. Click the [**Search**] button
 - V. Reports can either be viewed or viewed and saved (mark the check-box for saving the search report)
 - IV. The search is complete. The OA Admin or Project Manager can book the Resource to a project (click “Book”) or further research the existing bookings of the Resource (click “User ID”).
- ⇒ This completes procedures for Custom Search.

Further Instruction & Use – For further information regarding Quick and Custom Searches contact your Account Executive or call The NDH Group, Ltd. at 312.461.0505.