

Overview & Objective – The purpose of this O M & U is to provide guidance on OpenAir Role setup. The procedures outlined here succeed the instructions “Intacct Subscription 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 Role 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 “Roles” link

SETUP OF OPENAIR ROLES – Roles are used to separate classes of Users. These classes are provided specific module access (see below) and specific permissions within the modules. Permissions provide the ability to access features and should be set as follows:

- I. From the Roles Screen the following classes are seen and should be permissioned as follows (drill down on any one of the “Roles” links listed below):
 - **Administrator** – The rights for this Role cannot be changed. It provides for full access to the OpenAir account, including any new features that are added.
 - **User** – Settings for the *User* should provide the following permissions
 - General Settings
 - ◆ View shared reports
 - Timesheets
 - ◆ View approved timesheets
 - ◆ View archived timesheets
 - Expenses
 - ◆ View envelope reimbursements
 - **Project Manager** – Settings for the *Project Manager* should provide the following permissions
 - General Settings
 - ◆ View projects
 - ◆ View and modify existing projects, but not create new projects
 - ◆ Customize lists
 - ◆ View shared reports
 - ◆ View calendars for other users
 - MyAccount
 - ◆ View company schedules
 - Workspaces
 - ◆ Create workspaces
 - ◆ View all (unsubscribed) workspaces

Project Manager (Setup Continued)

- Resources
 - ◆ View bookings
 - ◆ View and modify own bookings
 - ◆ Create booking requests
 - ◆ View booking requests
 - ◆ View booking requests for me
- Projects
 - ◆ View all tasks and phases
 - ◆ View and modify tasks and phases
 - ◆ View project stages
 - ◆ View assignment groups
- Timesheets
 - ◆ View timesheet alerts
 - ◆ View approved timesheets
 - ◆ View archived timesheets
 - ◆ View all schedule requests
- Expenses
 - ◆ View envelope reimbursements
- **Sr. Project Manager** – Settings for the *SR Project Manager* should provide the following permissions
 - General Settings
 - ◆ View clients
 - ◆ View prospects
 - ◆ View projects
 - ◆ View and modify existing projects, but not create new projects
 - ◆ View generic resources
 - ◆ See billing rates and budget amounts
 - ◆ View hierarchies
 - ◆ Customize lists
 - ◆ Share saved reports
 - ◆ View shared reports
 - ◆ Modify shared reports
 - ◆ View calendars for other users
 - ◆ View dashboard graphs
 - MyAccount
 - ◆ View company schedules
 - Workspaces
 - ◆ Create workspaces
 - ◆ View all (unsubscribed) workspaces
 - Resources
 - ◆ View skills
 - ◆ View and modify skills
 - ◆ View profiles
 - ◆ View bookings
 - ◆ View and modify own bookings
 - ◆ Create booking requests
 - ◆ View booking requests
 - ◆ View booking requests for me

Sr. Project Manager (Setup Continued)

- Projects
 - ◆ View dashboards
 - ◆ View all tasks and phases
 - ◆ View and modify tasks and phases
 - ◆ View project analysis
 - ◆ View project overview
 - ◆ View project billing
 - ◆ View project stages
 - ◆ View assignment groups
 - ◆ View project pricing
- Timesheets
 - ◆ View timesheet alerts
 - ◆ View approved timesheets
 - ◆ View archived timesheets
 - ◆ View all schedule requests
 - ◆ View reports
- Expenses
 - ◆ View envelopes alerts
 - ◆ View all authorizations
 - ◆ View envelope reimbursements
- Invoices
 - ◆ View all TimeBills
 - ◆ View agreements
 - ◆ View and modify agreements

⇒ This completes permissioning of the OpenAir Roles and allows further OpenAir User setup.

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