

NetSuite OpenAir Essentials

Customizing Your OpenAir Account

KEY TASKS

How do I:

- Set up and manage projects?
- Create project work breakdown structures?
- Book resources to projects?
- Populate tasks with assigned resources?
- Create billing and revenue recognition rules for invoicing clients?
- Track time and expenses accurately against projects?
- Create custom time ranges that match our fiscal time periods?
- Create custom calculations for reporting needs?
- Report on **key metrics** during project delivery and after
- Display report results in visual charts or graphs?

Course Description

With NetSuite OpenAir, you have the tools necessary to gain real-time visibility into time tracking, resource utilization, project status, and financial metrics so you can improve efficiency and increase profits company-wide.

In this comprehensive, three-day course, you study these and other key features vital to successful project management and delivery. Through interactive teaching and hands-on exercises, you practice configuring, customizing and maintaining a NetSuite OpenAir account.

While working in a demonstration account that simulates live, real-time data, you also look at the end user experience, project management, resourcing and time and expense tracking resulting in billed charges. Finally, you study reporting basics and acquire the core skills needed to perform custom calculations, create custom detail fields and publish dashboard charts so you can proactively identify resource utilization, project creep, or cost over-runs in time to get a project back on budget.

Who Should Attend

Administrators, business analysts, project managers, and business process owners responsible for setting up, configuring and maintaining NetSuite OpenAir accounts.

Course Objectives and Topics

After completing this course, you will be able to:

- Define your configuration requirements and preferences
- Describe the workflow chronologically and identify which NetSuite OpenAir applications accomplish which business processes
- Understand basic data integration between NetSuite and NetSuite OpenAir applications
- Set up users, create roles, skill profiles and define filter sets
- Use access controls to define and restrict information to ensure account security
- Create customer and contact demographic records
- Create detailed project plans with correct project stages, work breakdown structures, assigned resources and financial parameters
- Configure timesheets, set up expenses and define approval processes
- Define project billing rules, invoicing and revenue recognition requirements
- Identify future resource needs and simulate potential project profitability or loss through the use of generic resources
- Configure customized fields for reporting needs
- Analyze and extract NetSuite OpenAir data to obtain important company metrics through reporting and dashboards



Day 1 Agenda

Configure and Set Up

- Navigate, Set Up and Configure: Navigate Netsuite OpenAir applications, global settings
 and application settings, identify the tasks performed in each NetSuite OpenAir application, set
 password and security questions, use settings to control access to information, user proxies and
 define permissions
- **Set Up Roles and Filter Sets:** Create custom roles, create filter sets and set access controls, use filter set hierarchies, use Project Access meta-values in filter sets

Set Up and Staff Projects

- **Create Resource Skills Profiles:** Create the initial resource profile structure, modify and create attribute sets, modify and create categories and create skills within each category, create profiles for each user, search for appropriate users by profile
- Set Up Users, Customers and Contacts: Enter employees as users, identify best practices for creating and managing users, set up customers, set up contacts, define billing information
- **Set Up Projects:** Navigate the Projects application, create projects, portfolio and sub projects, project stages, clone projects, define approvers and approval processes, set up project alerts
- Set Up Work Breakdown Structures: Create and edit phases, predecessors, create tasks, assign tasks to resources, create project templates, monitor project progress

Day 2 Agenda

Set Up and Staff Projects Continued

Book and Assign Resources: Distinguish bookings and assignments, book resources to
projects, assign resources to tasks, copied templates, use booking types to control staff
availability, describe the booking chart, create assignments, describe the assignments chart

Set Up Billing, Timesheets and Expenses

- Create Billing Rules, Billing Automation and Forecasting: Enable project billing, identify the different billing rule types, create billing rules, generate forecasts and projections
- **Recognize Revenue:** Create revenue recognition rules, copy rules to other projects, define and create different revenue recognition rule types, create and run revenue recognition
- Create Timesheets: Configure the time entry grid, set up approval processes, rules, alerts and notifications, customize the timesheet report layout, create time types, timesheet tasks and services, create and submit timesheets
- Set Up Expenses: Create expense items, customize expense report layouts, set up approval
 processes, alerts and notifications, enable multicurrency support and configure currency exchange
 rates, create and submit expense reports
- Run Billing and Invoice Charges: Define project billing rules and invoicing requirements, create invoice layouts and add logos, create invoices and edit/delete charges on invoices, attach documents to invoices, record and apply invoice payments



Day 3 Agenda

 Run Billing and Invoice Charges: Define project billing rules and invoicing requirements, create invoice layouts and add logos, create invoices and edit/delete charges on invoices, attach documents to invoices, record and apply invoice payments

Reporting

- Use Summary, Detail and Advanced Reports: Distinguish standard, summary and detail reports, use permissions to allow certain roles to view specific reports
- Build Summary Reports: Locate and identify the Summary reports, explain when to use Summary reports, run Summary reports, configure Summary reports to include sub-totals, detail fields and filters, report on specific date ranges
- Build Detail Reports: Locate and identify the Detail reports, explain when to use Detail reports, run Detail reports, configure Detail reports to include sub-totals, detail fields and filters, report on specific date ranges
- **Customize Reports:** Use custom detail fields, use custom calculations and conditional dropdown fields, use date range fields as dates in custom detail fields and in summary reports, rename built-in fields and terminology
- **Distribute Reports:** Run and share reports, use report filter set overrides, schedule reports, file and organize reports, display report results on the dashboard

NetSuite OpenAir reserves the right to adjust the stated course content to reflect changes to the NetSuite OpenAir application and to meet the expressed needs of course attendees.

Features and functions covered in this course might not reflect those in your purchased NetSuite OpenAir account.