



NETSUITE OPENAIR ESSENTIALS

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 the basics in reporting functionality 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.

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?
- Use Report Manager to create basic reports to gain visibility into strategic business operations?

Who Should Attend

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

Course Topics

- Define your configuration requirements and preferences.
- Describe the workflow chronologically and identify which NetSuite OpenAir applications accomplish which business processes.
- 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.

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.

Day 3 Agenda

Set Up Billing, Timesheets and Expenses *(continued)*

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.

SuiteAnswers

Get answers to your support and training related questions:

- Search for New Feature Training answers to learn about the latest OpenAir release functionality.

Live Training Webinars

Participate in free Webinars to get practical tips and tricks for using NetSuite better:

- Go to suitetraining.com > Webinars and Events to view the schedule and register for an event.

Reporting

Reports Manager Overview: Explore the next generation features in report management to create basic reports in order to obtain insight into strategic details of specific organizational processes.

Report Types Overview: Distinguish standard, Crosstabbed (summary) and Tabular (detail) reports, use permissions to allow certain roles to view specific reports.

Distribute Reports: Run and share reports, use report filter set overrides, schedule reports, file and organize reports, display report results on the dashboard.

NetSuite 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.