Connect Your Smartsheets to OpenAir

Improve data consistency and improve efficiencies by connecting your Smartsheets to OpenAir for a complete end-to-end solution. Integrating Smartsheets with OpenAir enables:

- Seamless access to all project information even for users who may not be in OpenAir
- Visibility within OpenAir into data managed in Smartsheets (and vice versa)
- Ability to manage projects to a greater level of granularity in Smartsheets than what may be needed in OpenAir
- Customer collaboration in Smartsheets using OpenAir data

Integrations require an understanding of more than simple field mapping and data rules. With over a decade of experience, Top Step will ensure your integrations consider business process workflows, what system holds the source of truth, end user behavior, timing and dependencies, and best practices that should be applied when integrating your OpenAir system to Smartsheets.

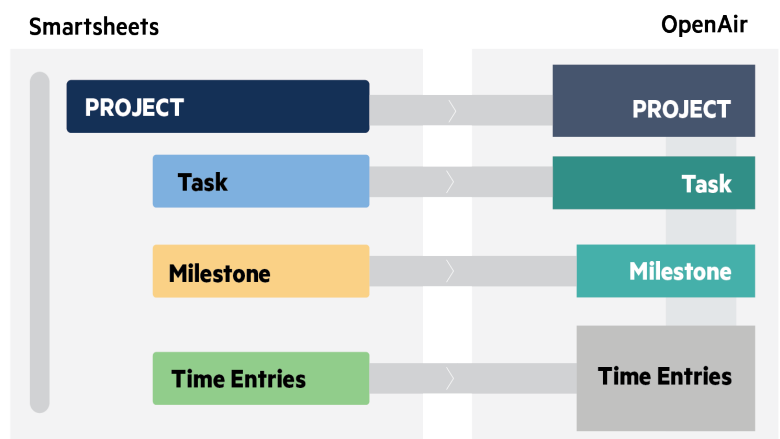### Smartsheets and OpenAir Integration Experience:

- Smartsheet to OpenAir Project dates and project demographics, including custom fields
- Smartsheet to OpenAir Project work breakdown structure (WBS) including:
  - » Project tasks
  - » Task planned hours
  - » Task assignments
  - » Custom fields
  - » Creation of a milestone phase with child milestones for tracking
- Smartsheet to OpenAir Time entries
- Ability for integration to be bi-directional — OpenAir passing data into Smartsheets
- Ability to use different views (Grid, Gantt, Card) in Smartsheets and manage data based on each users preferences

By leveraging our expertise, experience, and best practices we will help you step around any potential pitfalls.

Here is one of the many options for Smartsheets and OpenAir data flows:

Benefits of OpenAir Integration Services

- Dedicated team experienced in OpenAir and integration best practices
- Leverage the strength of each systems intended purpose
- Improve speed at which information is available
- Increase communication accuracy across your business units

Smartsheets

OpenAir

Smartsheets		OpenAir
PROJECT	→	PROJECT
Task	→	Task
Milestone	→	Milestone
Time Entries	→	Time Entries

Our Approach

We follow a simple and straightforward approach that delivers a superior solution.

1

Business Model Alignment and Design

- Use of workshops to identify system ownership by department.
- Review of data ownership by system.
- Determine data workflows, frequency, and integration technology/software.

2

Integration Build Out and Validation

- Gather field specifics from each system for mapping and transformation needs.
- Configure and connect integration technology to end systems.
- Establish use case and testing scenarios to confirm performance, design, error handling, and more.

3

Deploy and Monitor

- Support migration to a production environment with live data.
- Assist with data alignment needs and system outage coordination.
- Establish monitoring activities to ensure continued success.

Integration Tools We Use

We primarily utilize NetSuite OpenAir's native APIs to connect OpenAir to other systems. We also have deep experience with Dell Boomi AtomSphere® and NetSuite OpenAirCONNECT with additional leading integration products continually being evaluated and added to our tool set. Our integration experience combined with our expertise in NetSuite OpenAir allows us to help you quickly and smoothly design and implement the data integration exchanges for your specific PS business model.

About TOP STEP

Top Step improves business efficiency and productivity for Professional Services business operations. We help you achieve your profitability goals allowing you to focus on building your business. Our experts have extensive experience in professional services business operations, project management, and professional services automation with both local and global Professional Services organizations. We are proud to be awarded "Best of the Best" by SPI Research and have been ranked as one of the fastest growing companies by Consulting Magazine and Inc. 5000.

topstepconsulting.com