UI4: The New Frontier

A Guide to OpenAir's New User Interface

TOP STEP

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UI4: What is it?

OpenAir has redesigned the user interface (UI) to streamline for tablet and mobile use. This document will explain the new user UI and highlight the differences between UI3 and the new UI, UI4.

Top Step recommends that your organization enable the new UI in a non-production account and allow ample time for testing, creating documentation, and training users on the changes.

At the time of this eBook release, UI4 is by customer request for enablement. New customers as of June 2018 are being deployed on this new UI automatically.

Summary of changes & key updates

- List views display
- Gear actions (download, rows per page)
- Public list views (now a standard feature)
- Bulk action
- Multi-column sorting
- Consolidated filtering
- New tab for workflow views: To Approve
- User access center and ability to upload profile images
- Tips/Compare views
- Enhanced layout and navigation for tablets and mobile devices
- Direct navigation to pages within each module

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Phased Rollout Summary: Internal Switches

While UI4 was initially rolled out in phases the phases have now been consolidated and are part of a single, internal switch. When enabling the new UI, the internal switch request to **Enable the Redesigned OpenAir User Experience** must be requested.

NOTICE:

NetSuite OpenAir will be automatically updating all accounts to the Redesigned OpenAir User Experience (UI4) with the April 2022 release. It is recommended that the new UI is enabled in a non-production environment for testing and creation of user training materials.

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Module Navigation Bar

Module Access

Module access has moved from the top of the page to the left side. Instead of the additional access bar which contained the pages within the modules, the navigation bar now allows for direct access to specific tabs and pages within the module.
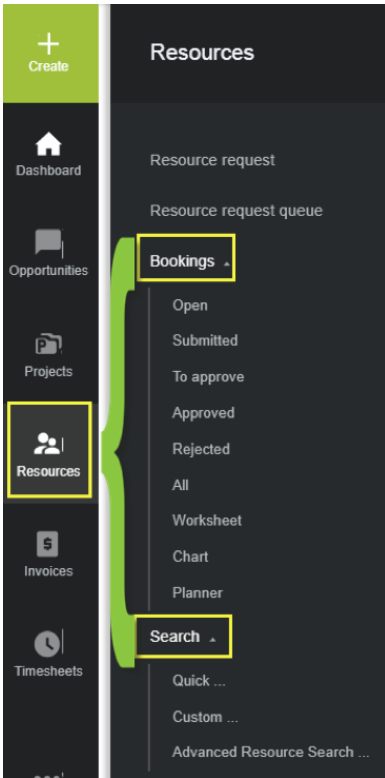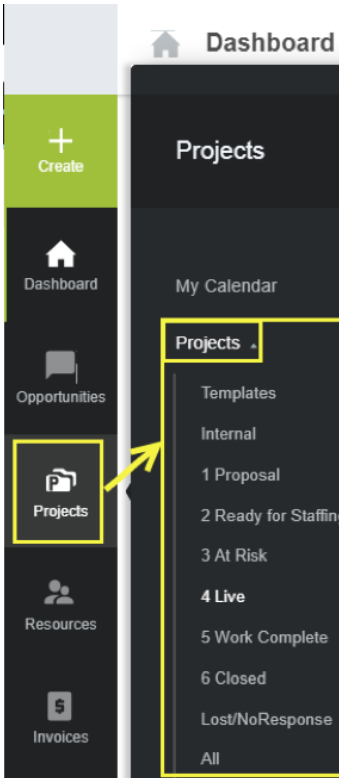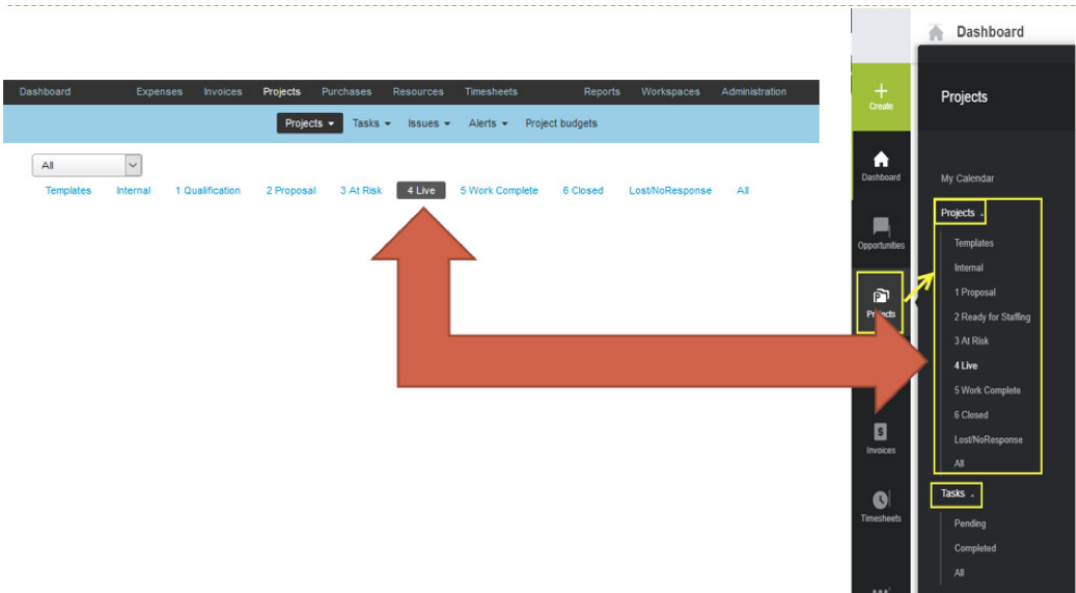
Additional Modules

Depending on your screen size and resolution, all modules may not display on the left side bar. In those scenarios, there is an **[...]** icon (ellipsis) at the bottom of the list. Select the ellipsis to open a new menu with any modules which are not otherwise visible.
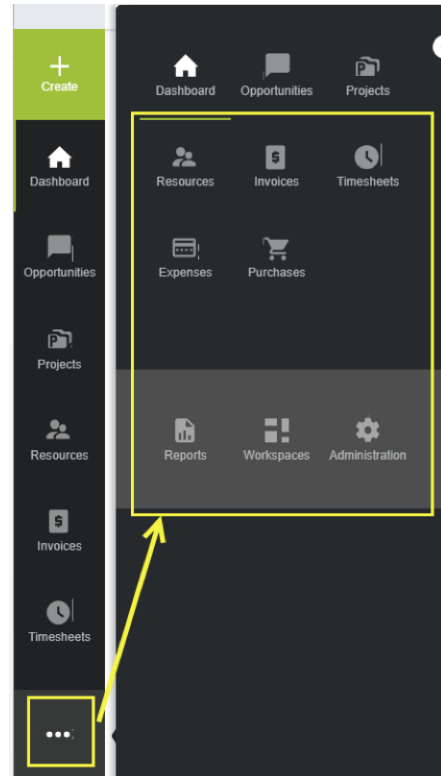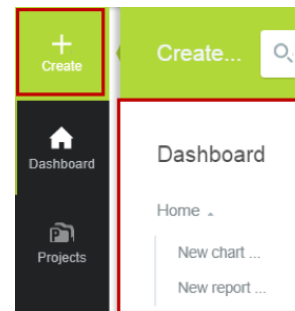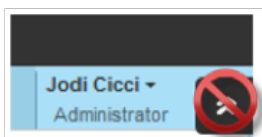

Frequently Used Buttons

Global Create

The global create button is also permanently docked on the left side of the page, above the module access icons. Selecting the option for **+ Create** displays the available options, based on the form or module in which the user is present.

The web page vertical expand feature has been removed in UI4.

Tips

The tips button is no longer on the left side of each form or page in the format of a dialog box, rather has been relocated to the top right of the screen and is a lightbulb.
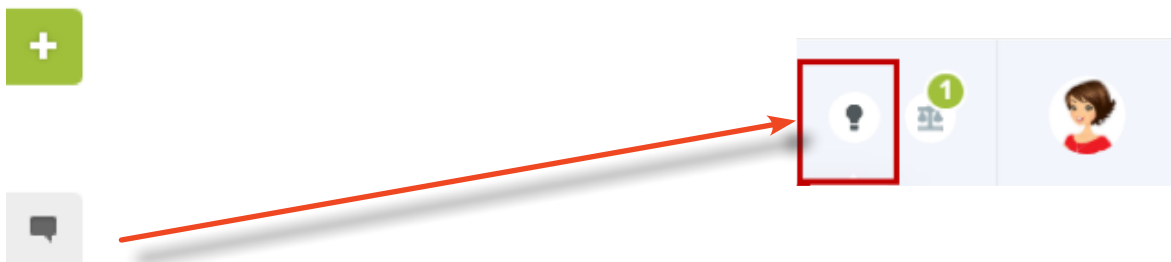
Resource Compare

Along with the relocated tips button, the resource compare icon, for those user roles which it is enabled, is now present at the top of the page. Selecting the resource compare button presents the option to enter the 'Compare View' where different resources can be selected.

User access center

The user access center now displays user initials or a photo rather than the full name. If a user has role permission to update their own photo, they can do so under the option **My profile**. Text size has a number conversion in UI4. All other menu options remain the same.
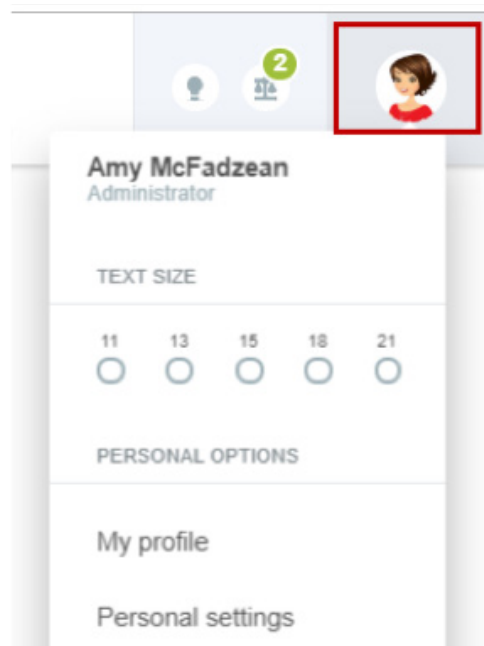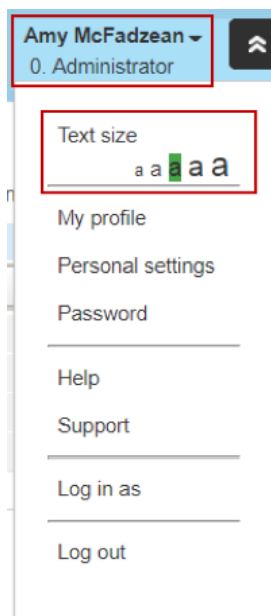
List Views

Overview

This feature allows for easy and streamlined setup of view configuration and sharing that configuration with users in the organization. This feature also enables the Create public list views user setting, which can allow users to create list view configurations which other users can see and utilize.

This save list view configuration is enabled by internal switch and replaces the ability to push out a saved list view to users. Once the internal switch is enabled, role permissions allow a user to create a public list view. It is recommended that a limited number of roles and users have the ability to create public list views.

With the new list view display, users:

- Can still lock columns and resize columns
- Utilize new sort controls
- Can still customize list views

Internal switch name: save list view configurations [if not already enabled, which has become a standard feature]

Control Console consolidates features

Feature Enhancement: Redesigned Record Headers

UI4 features redesigned record headers and in-record navigation relocated to the top bar.

The update affords more real estate with a new record header and responsive in record navigation menu relocated to the top bar. The redesigned record header is available on various entity forms throughout NetSuite OpenAir.


Depending on the record you are viewing it may include the following features:

- The record title and sub-title remind you which record you are viewing in the same way as in the old user interface. For example, if you are viewing a Project record, the title and sub-title will be the Project name and the Client name, respectively.

- The in-record navigation menu lets you navigate between the different views and tools available for the type of record you are viewing. The in-Record navigation menu is fully responsive and adapts well when viewing the record on tablets or small screens. If there is not sufficient space to display all menu options in the in-record navigation panel, click More to display a vertical continuation menu.

- Click the back arrow ← in the top left corner to go to the list view for items of the same type as the record you are currently viewing.

- The record information panel includes more information about the record you are viewing and quick navigation links to related assets. For example, if you are viewing a Project record, the information panel shows the project progress bar and project status and includes quick navigation links to any assets associated with the project. Such assets may include a Project Status Summary Report ⬈, a Workspace ⬛, or the Project Status News Feed 🔔, if they are configured for the project you are viewing.

Feature Enhancement: Gear Icon replacement

UI4 has replaced the gear icon, which formerly existed on the top right corner of list views, with a series of new icons.
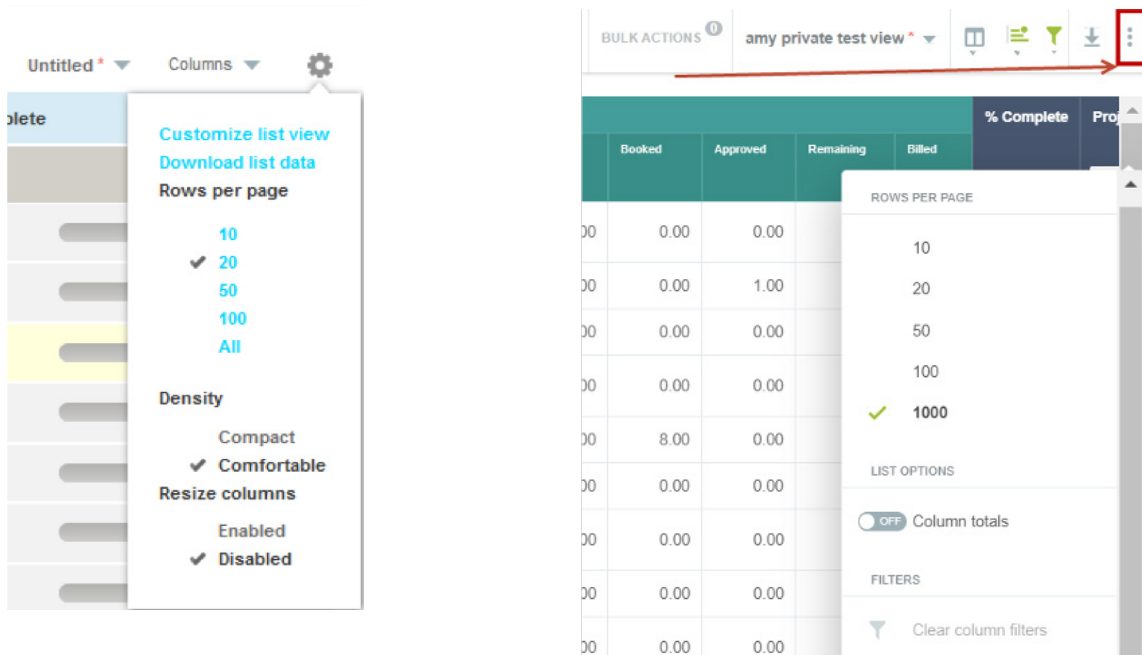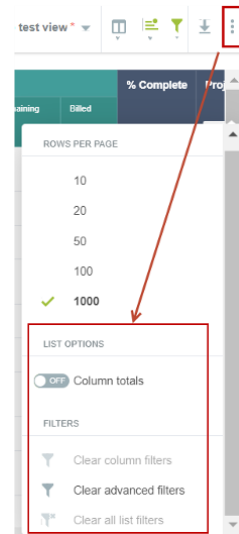

1. Customize list view has moved to its own icons, which includes the new list view feature.
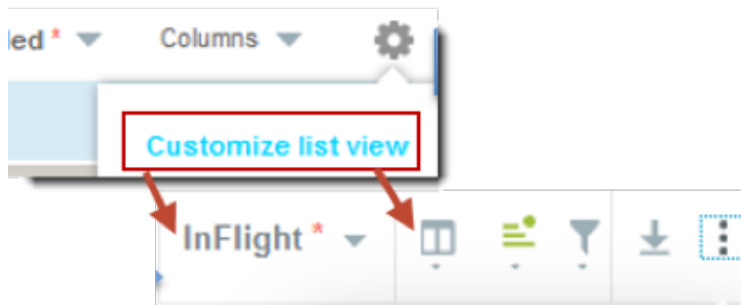
2. Download list data has moved to its own icon. The options to download in different formats show up in a pop out window.
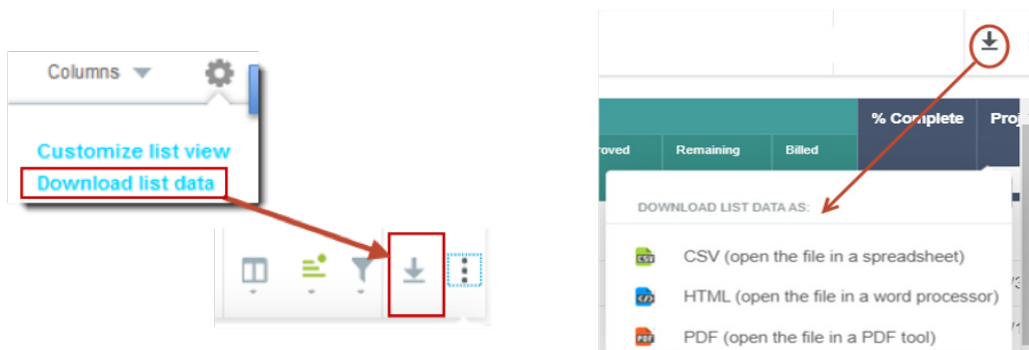
3. Density control removed & the switch removed to resize columns

4. New column total switch

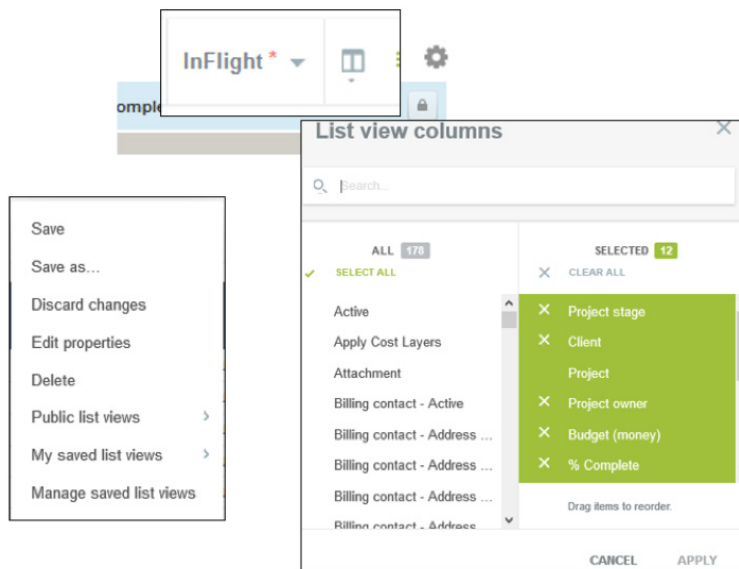5. New location for clearing column, advanced, all filters option

Column Resize

You can resize columns in the new user experience just as with UI3. Column width is saved when a column is resized. Resized UI3 columns are not supported.

Feature Enhancement: Managing List Views

To customize list views, a new icon, Column, is available alongside the manage list views icon.

Feature Enhancement: Column Sorting

Column sorting has a dedicated icon and can now sort up to 3 columns in ascending or descending order. The sort window can also be launched by typing "O", as a shortcut key has been added into UI4. The sort control is displayed in the column header and can be updated directly by selecting the overall sort icon.
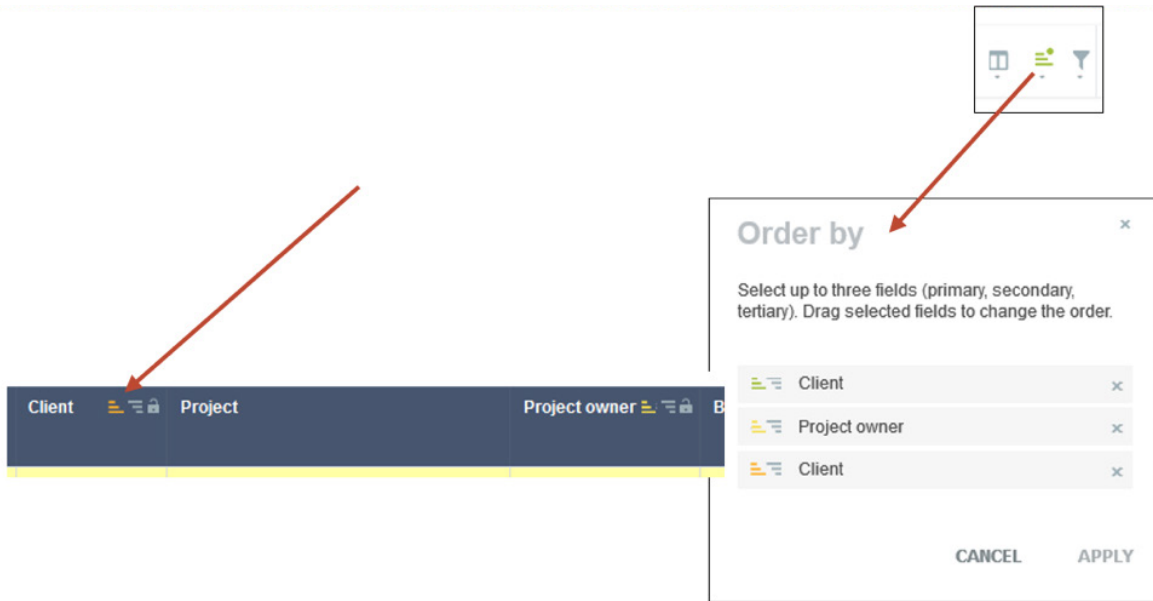
Feature Enhancement: Bulk Actions

The bulk action column in UI4 is locked for selection. The Column displays the number selected in the bulk action in addition to the highlighted rows. In addition to the click, a shortcut key was introduced and the bulk action menu can also be launched by typing "B" once the rows are selected.

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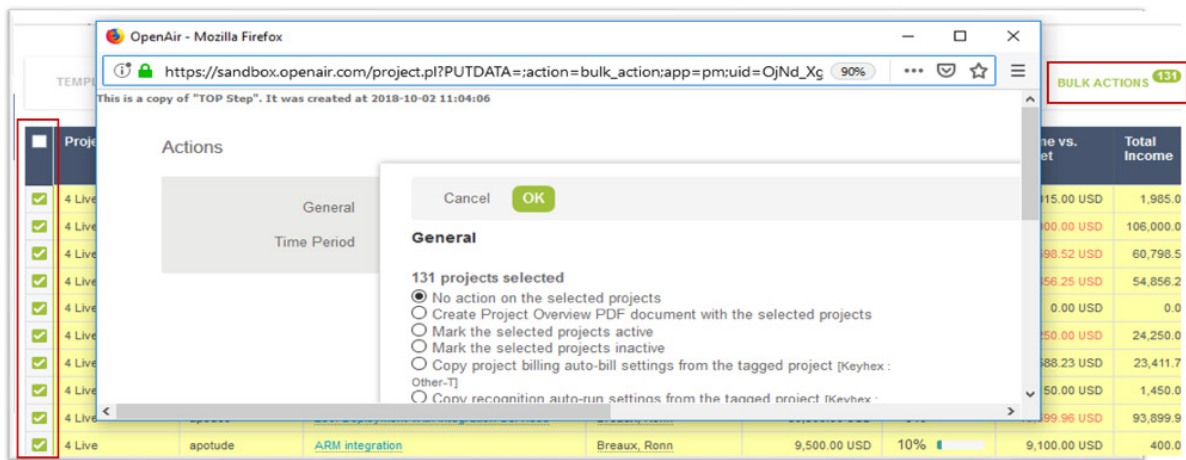
Lock Columns when scrolling in List Views and Reports

Column locking is available for all columns. You can set the lock to a new column by clicking another column locking icon; No need to disable the current locked column first.

Feature Enhancement: Advanced Data Filtering

Advanced filters are now launched via the shortcut key "F" or by clicking on the filter icon in the control center of the list view. Resetting the advanced filter to All will clear the UI4 filters; there is no longer an option to clear advanced filters via the tips menu..
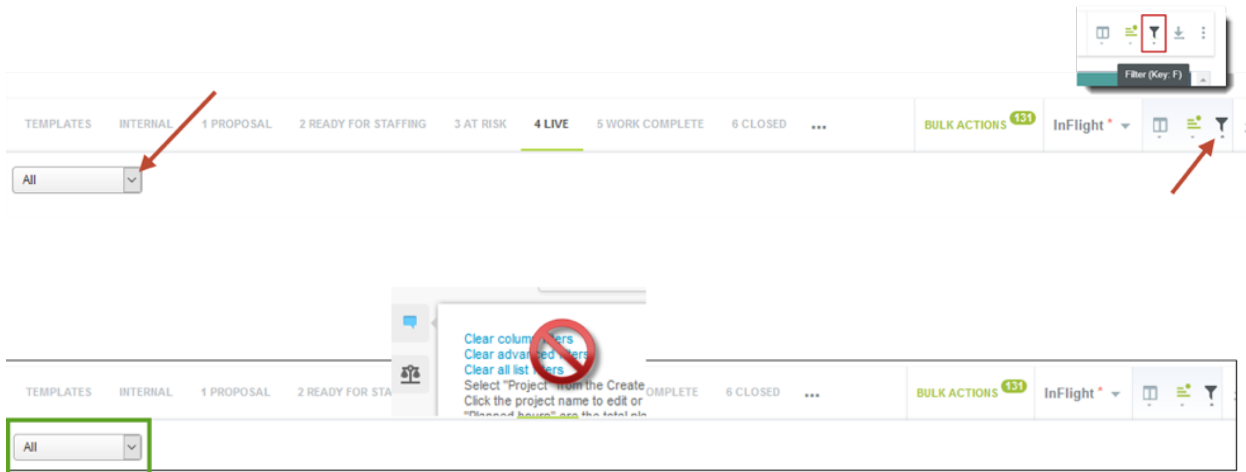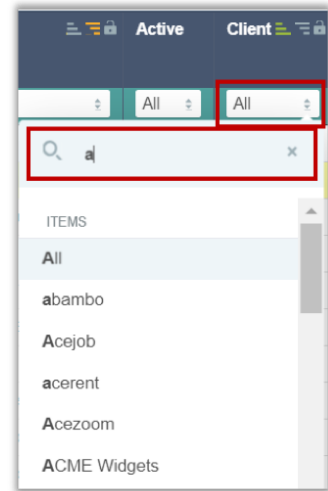

Feature Enhancement: Column Filters

Column filters remain in place. To clear all column filters at once, selecting the 3 dots, more options, icon, and Clear column filters will reset the list view columns.
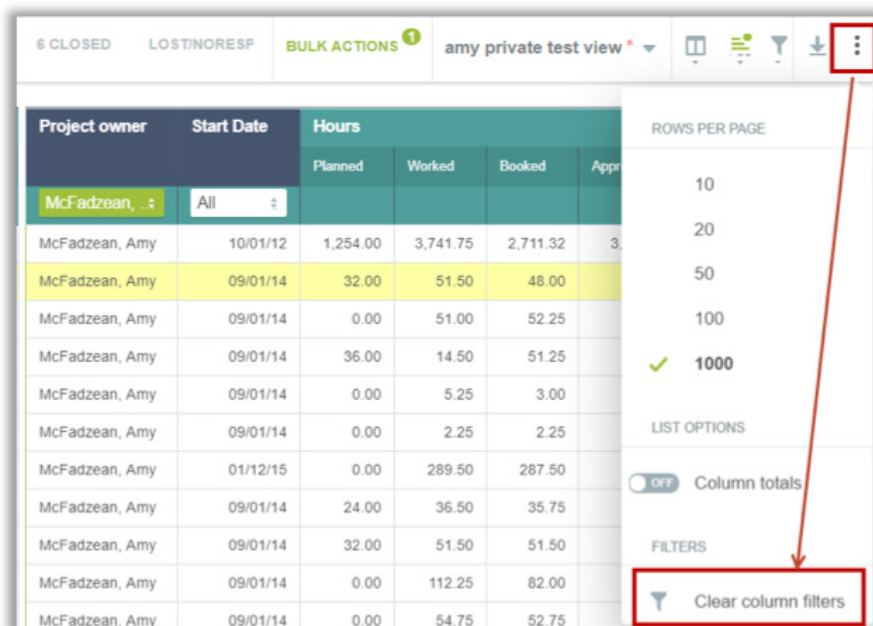
The redesigned user experience also features a search box at the top of the column filter dropdown which enables quicker selection from long lists of options.

Feature Enhancement: Inline Editing

Users who have access to modify a task will be able to modify details inline via the global task list view; this feature is only available in the global task list view and not the project-specific task list view. If a user double clicks on a field which is not available for editing, a message will display indicating that the field is not editable.

Feature Enhancement: Approvals

Where approvals are enabled for timesheets, expenses, and bookings, UI4 has split out the 'Waiting my approval' and 'All' links into two separate tabs.

'To Approve' tab

'Submitted' tab

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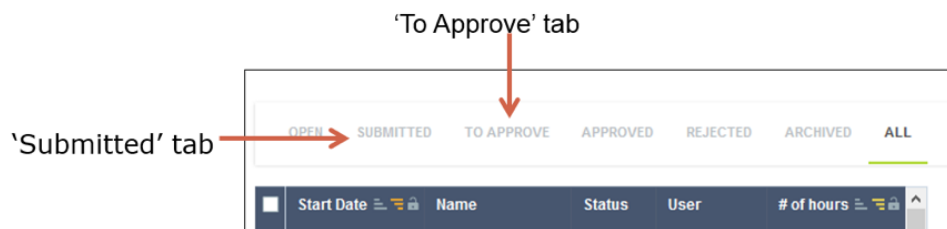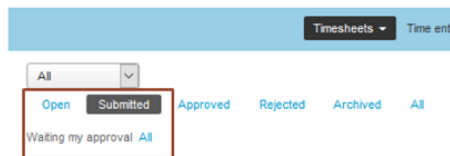
Feature Enhancement: Global Settings Screen Header and Overview Screen

Administration: Global Settings has a redesigned header screen with tab navigation and overview screens for each settings section. The tab navigation allows navigation from one screen to the other without going back to the main overview screen. The change allows administrators, and users who maintain different tables, quicker access to navigate through the available options.

Redesigned Global Settings Manu and Page:
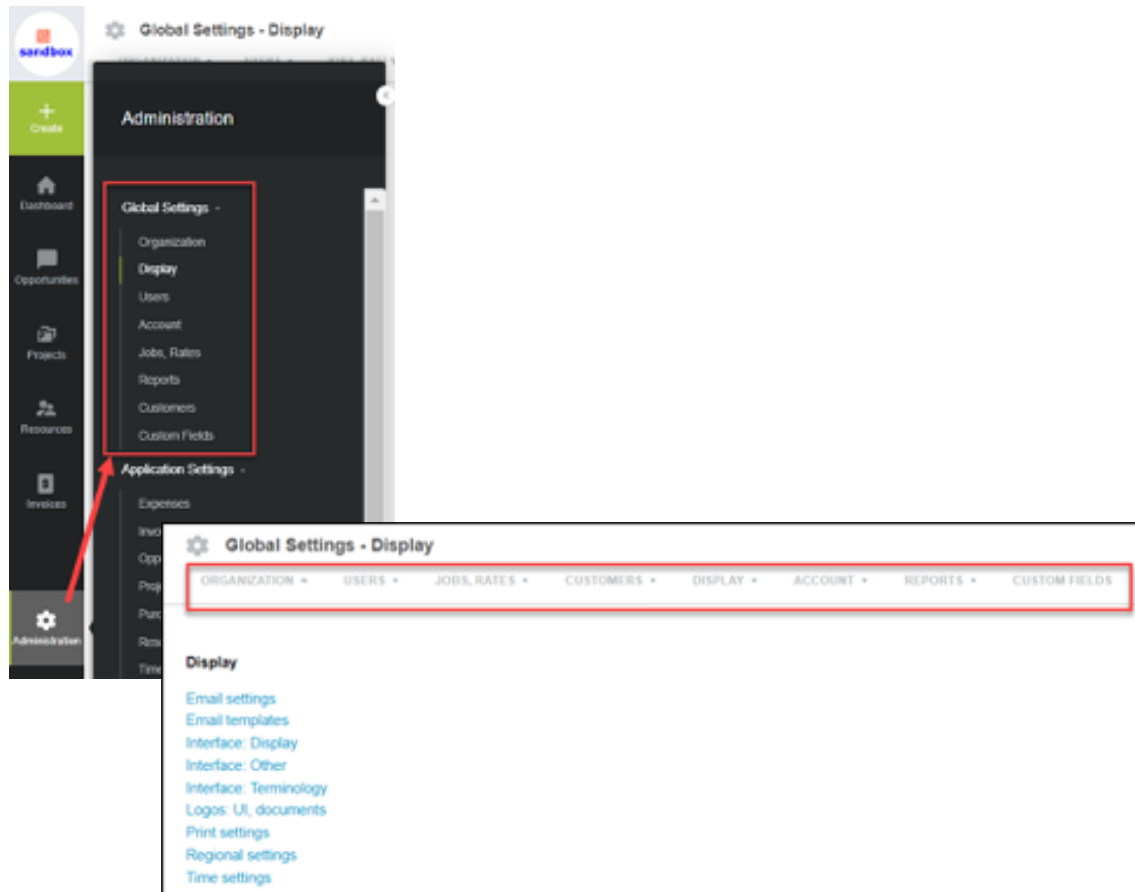
Settings menu from within the redesigned page:
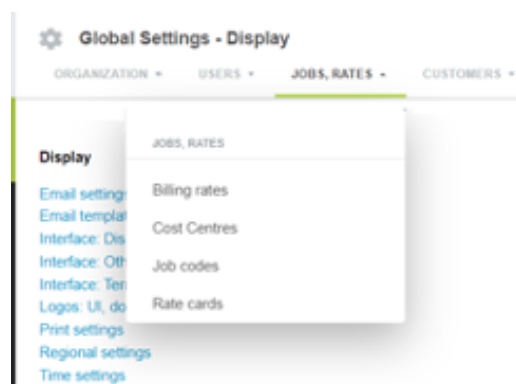
Custom List Views

List views were introduced as part of UI3, however there is an emphasis on these as the functionality allows for greater flexibility and ease on creating and sharing designated views with others. TOP Step recommends limiting the users or roles who can create public list views so as to maintain control over the data displayed in the views and to maintain as much consistency amongst user roles and data which is displayed as part of the available public list views.

How to save a list view

Once you have a list view that is customized to you and are ready to save it for future use, click the icon next to the **"Untitled"** list view name and click **Save as**.

This will prompt a new window for the new list view settings. To make the list publicly available, check the box Make this list view public. To set a view as the default view for users, check the box Use this list view as default for new users. If the 'set as default' box is checked, this will override any current list views that users may have already selected.

Your customized list view will now appear in the dropdown menu. If a list view has been modified or edited after it has been saved, the list view name will appear with a red asterisk.

List View for Projects * ▼

You can save the edits to the current list view, or save the edits as part of a new list view.

**To save modifications or edits to an existing list view:**

1. Go into the list view you would like to save the edits for.

2. Click the icon next to the currently opened list view and click Save.

To create a new list view from an existing one:

1. Go to the list view and add or modify filter data settings.

2. Click the icon next to the currently opened list view name and click Save as.
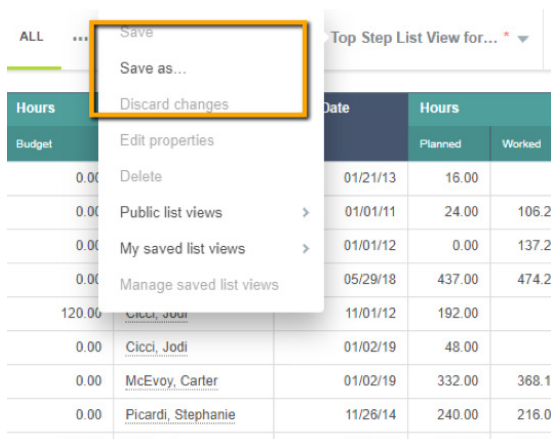
3. In the New list view settings window, enter a name for the list view in the **List View Name** field.
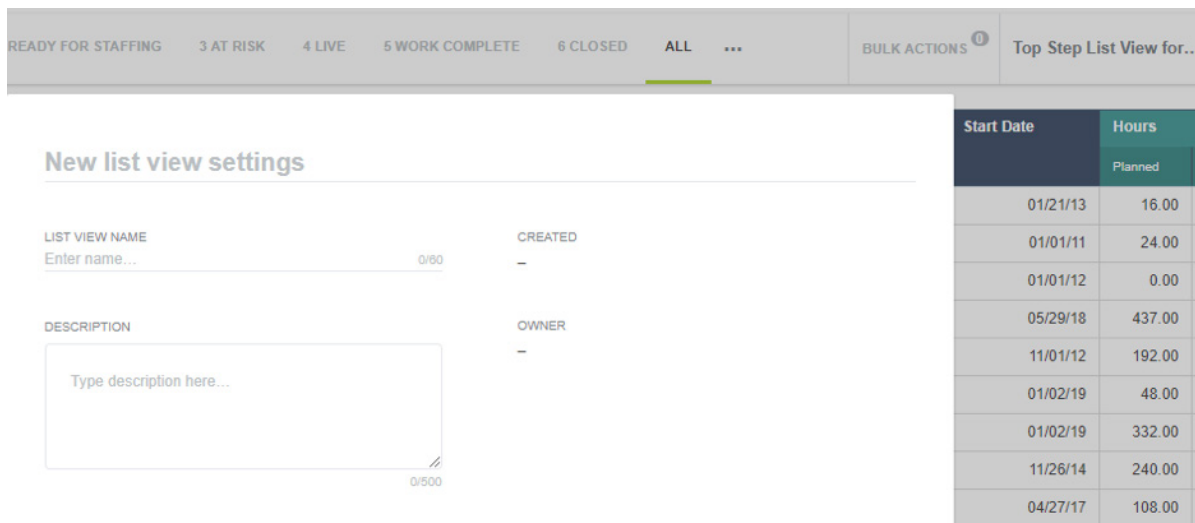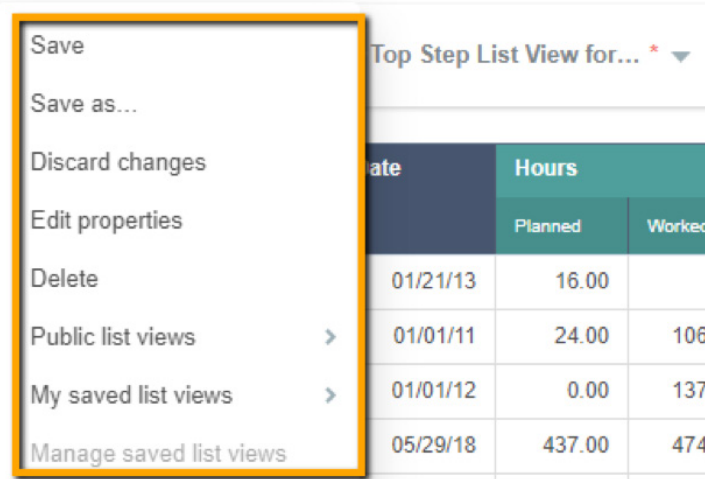

4. Click Save.

If you make any edits to a saved list view which you do not want and haven't saved, you can discard them now.

To discard unsaved changes to a list view:

1. Click the icon next to the list view name and click **Discard changes**.


To delete a saved list view:

1. Go to the list views and select the list view you wish to delete.

2. Click the icon next to the list view and click Delete.

To add a list view to your favorite list:

You can also set frequently used list views as favorites from the **My saved list views** dropdown list.

To select a favorite list view, point to the list view's name in the **My saved list views** dropdown list and click the star icon next to the name.
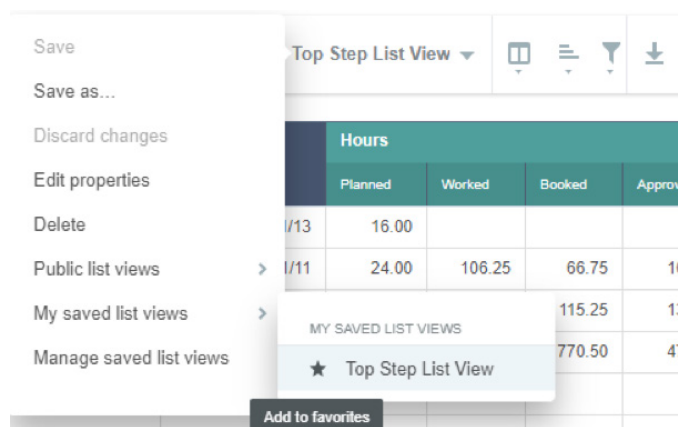
To remove a list view from your favorites, click the red star icon next to its name.
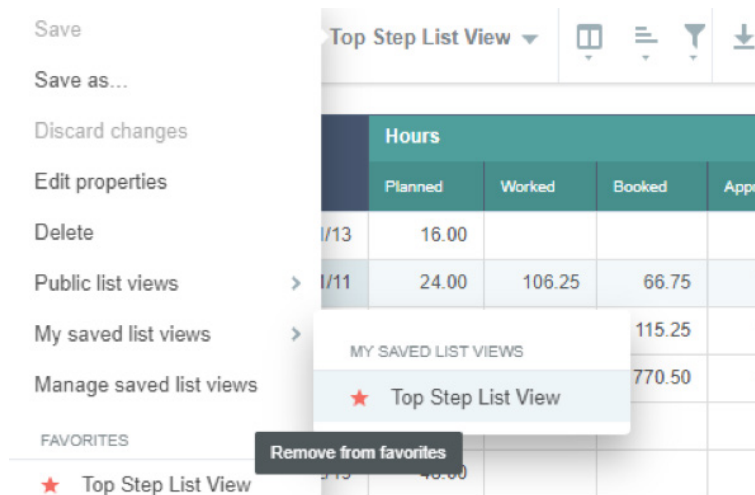
To Create a public list view:

1. Under the list view settings pop up, select the privacy option to make this list view public.
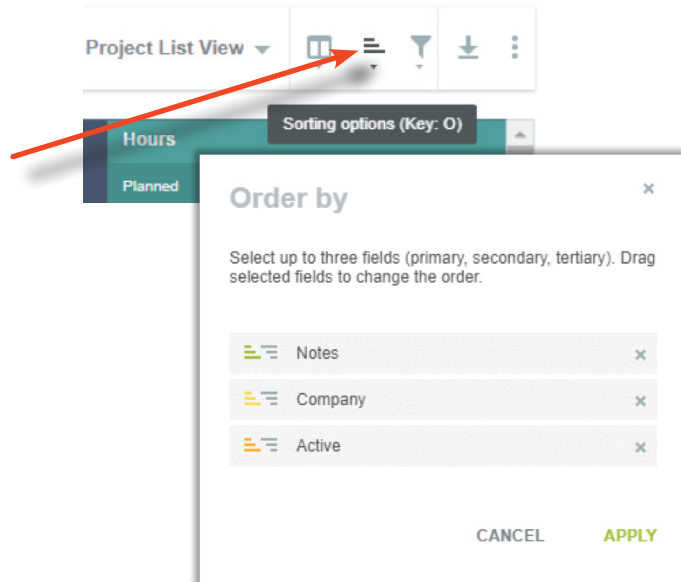

## Shortcut to open previously saved List Views

Press the L Key to open previously saved list views.

List View Sorting

The list view feature includes a list view sorting options on your display toolbar.

Once you select the sorting option an Order By window will pop up.

The Sort Ascending or Sort Descending icon next to a field will select the sort type. Click Apply to save the changes.
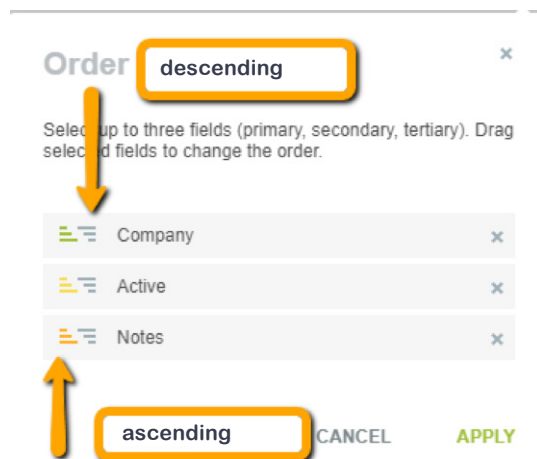
You can also sort by columns in the list view directly by pointing to the column title and clicking the Sort Ascending or Sort Descending icon.

- Once you have selected three sort fields, you will are unable to select another sort column until you have removed another field from the sort order.
- To deselect the field as the sort field, simply click the sort icon.
- The Reset to default icon removes all custom sorting and returns the list to the default sorting.
- The Sort ascending and Sort descending icons are color-coded: The primary sort field is green, the secondary sort field is yellow, and the tertiary sort field is orange.

Global List View Management

It is recommended that an administrator periodically review the saved list views for the organization. The option for viewing these is located in Administration > Global Settings > Organization > Saved list views.

Once selected, the option to run bulk actions on views is in the leftmost column as is visibility into all existing saved views, public or private.

List View Filters

Inline filter setting

The inline filter setting replaces the column header filters, as were present in UI3. Selecting the filter icon or pressing the F key on your keyboard will open the Filters menu. The Inline advanced filter setting comes standard with UI4.
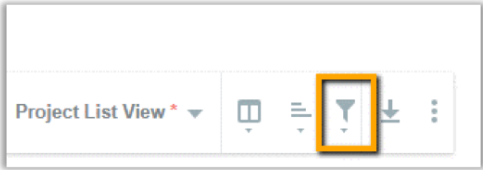
Advanced filters

The advanced filter remains the same, as in UI3, and remains located on the left side and above the list view on most pages; the default setting will display All or No Filter. Advanced filters are used as personal, saved filters across the OpenAir modules and list views.
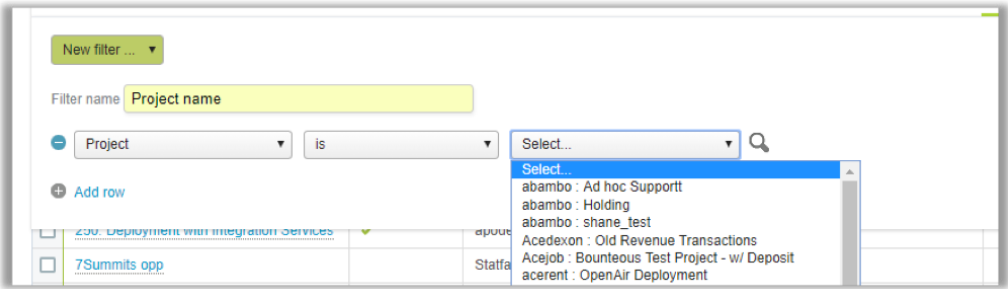
Project Center Outline View

Overview

The Project Center Outline View was added during the October 2019 release. When the Project Center feature is enabled, a separate tab is displayed from within the project. Additional functionality to enhance the project center outline view is being added during future releases; the premise of this feature is that it can act as a hub for both project and resource management, for that project, from a single location.

Once the feature is enabled, and the appropriate role permission granted, inline editing in list views is available, creation of phases, tasks, and milestones are possible without the need to open the respective form pages, tasks can be dragged between phases, and bookings for the project can be managed.

Additional information on how the Project Center Outline View can work for your organization is available for discussion through the Top Step team.

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.

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