Connect OpenAir to Outlook

Microsoft Outlook is the market leader for managing company's emails and calendars. Integrating OpenAir to Outlook will allow your PSA to use the email and calendar features to send emails and update calendars.

What Data Is Exchanged?

Connecting OpenAir to Outlook email server allows for completely customizable email alerts with OpenAir content. Examples we have worked on include:

- Email timesheet statuses with more details across a group of users
- Emailing customers with key project data on a recurring basis
- Emailing project managers when updates are required on their projects
- Project stage emails with additional details
- Approval emails with additional details.
- Connecting OpenAir with Outlook calendar allows schedule events in OpenAir to show on employee calendars.

This integration can be bi-directional so updates in Outlook or OpenAir update each other. The most common use case is resource schedules in OpenAir updating Outlook calendars.
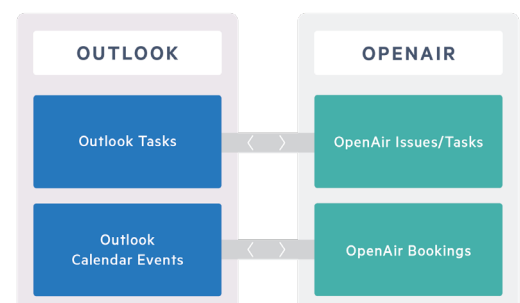
Common Questions

We want to set up calendar items with specific reminder notification times, is this possible?

Yes — calendar items can be set up with or without reminder notifications and they can be customized to specific times or intervals.

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

OUTLOOK		OPENAIR
Outlook Tasks	⟨ ⟩	OpenAir Issues/Tasks
Outlook Calendar Events	⟨ ⟩	OpenAir Bookings

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.

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