OpenAir

ORACLE NETSUITE

Find Exactly the Right People for the Job with

Resource Demand Request (RDR)!

HOW DOES RESOURCE DEMAND REQUEST WORK?

- RDR enables you to find and assign resources with specific sets of skills to your projects.
- Create Resource Requests and Queues for resources with specific characteristics, such as language proficiency, product knowledge, or job roles.
- Book resources to projects from RDR, or download search results for later use.

WHAT CAN RESOURCE DEMAND REQUEST DO FOR ME?

- Help you quickly identify the right people for a project with requirement match ratings.
- Quickly book resources to projects.
- Save resource request profiles for later use and download searches for your resource management team.

Select desired resource and task → **Check resource utilization** → **Drag a new booking and edit booking details** → **Save and submit the booking!**

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Resource Demand Request Quick Reference

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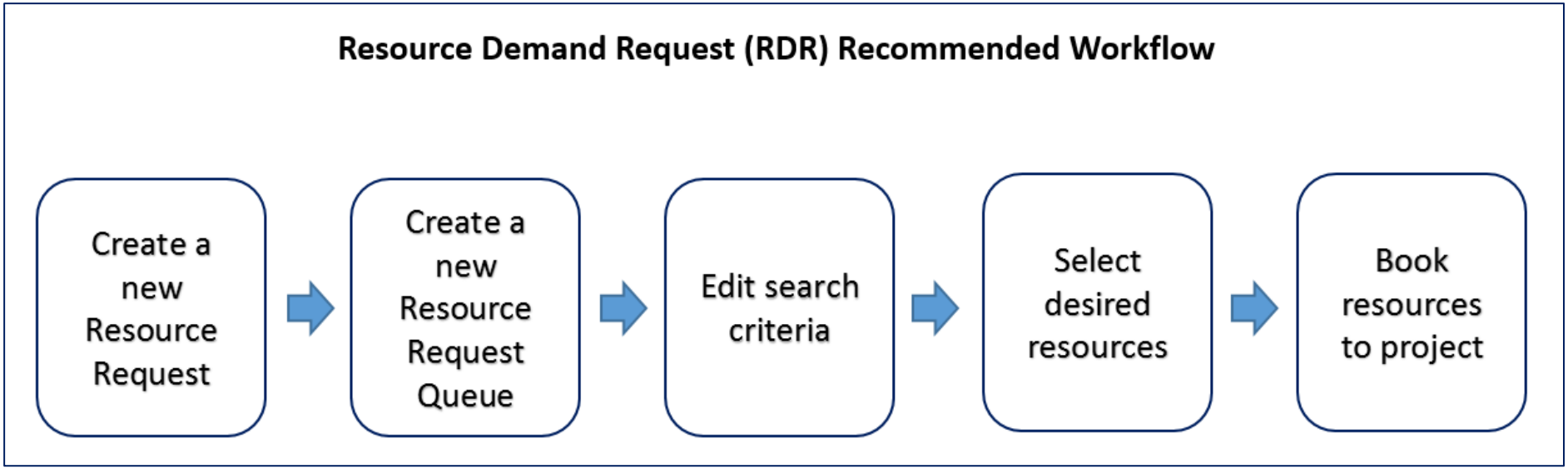
Resource Demand Request

The Resource Demand Request (RDR) tool enables you to find and assign resources with specific sets of skills to your projects. To use the feature, first create a Resource Request, which acts as a folder for individual Resource Request Queues. Resource Request Queues are searches for resources with specific characteristics, such as language proficiency, product knowledge, or job roles.

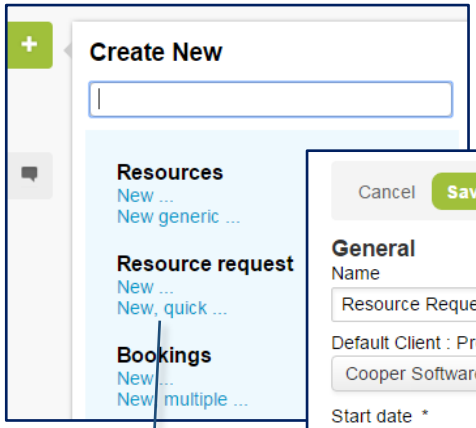
To enable this feature, contact OpenAir Support and ask them to enable the **Enable resource requests** switch.



Resource Demand Request Quick Reference

Create a New Resource Request

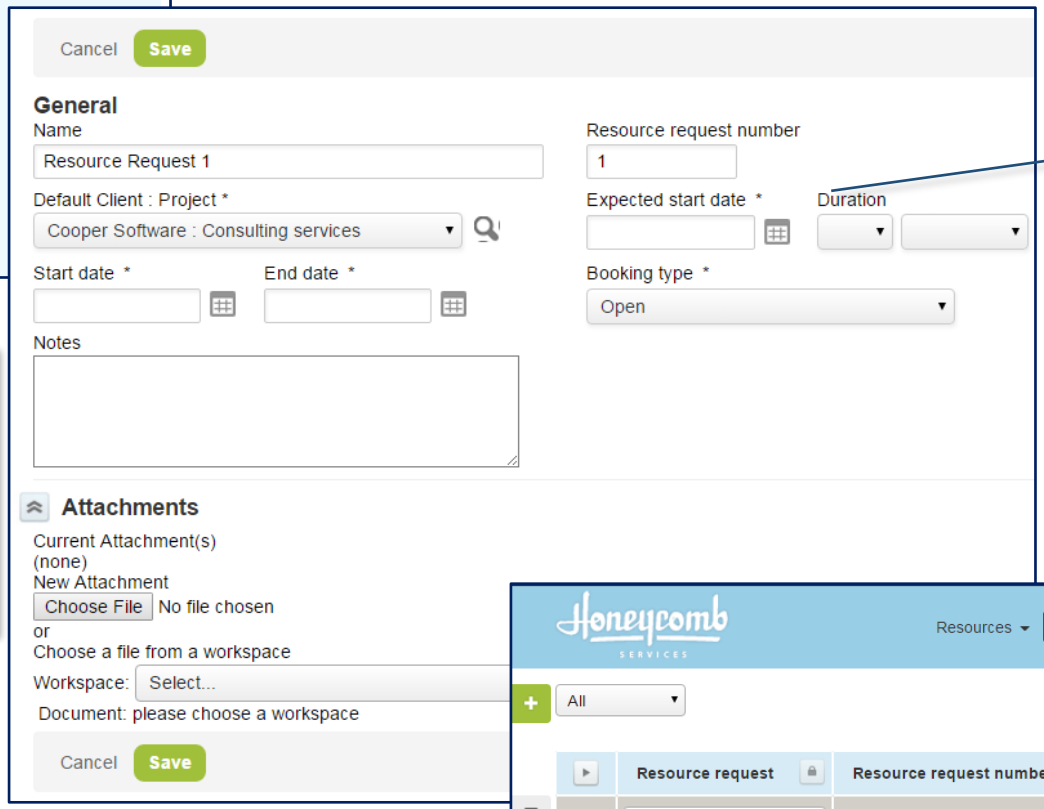
A Resource Request serves as a folder for Resource Request Queues, which are your detailed resource searches. Every Resource Request Queue needs to be in a Resource Request.



Click the **Create** button and select either:

Resource request (New ...) – opens a form to create only a Resource request.

Resource request (New, quick ...) – opens a form to create both a Resource request AND the first Resource request queue.



Enter the name for the Resource request, the default client and project to use for new Resource request queues, and the expected duration for bookings. Note that you can use either **Expected start date** with **Duration**, OR set a **Start** and **End date**.

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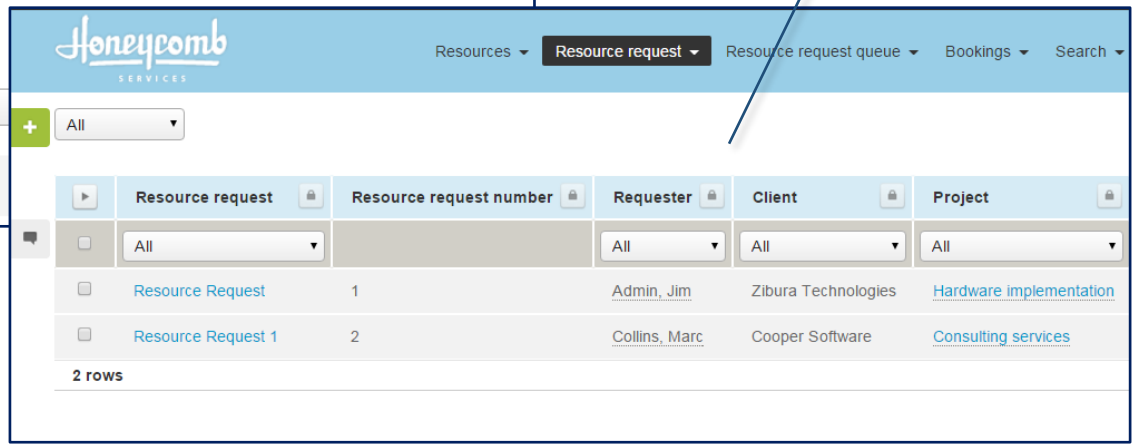

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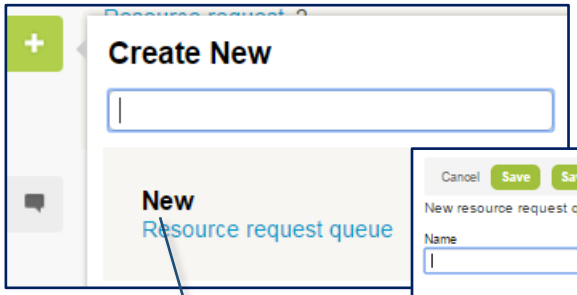
Resource Demand Request Quick Reference

Create a New Resource Request Queue

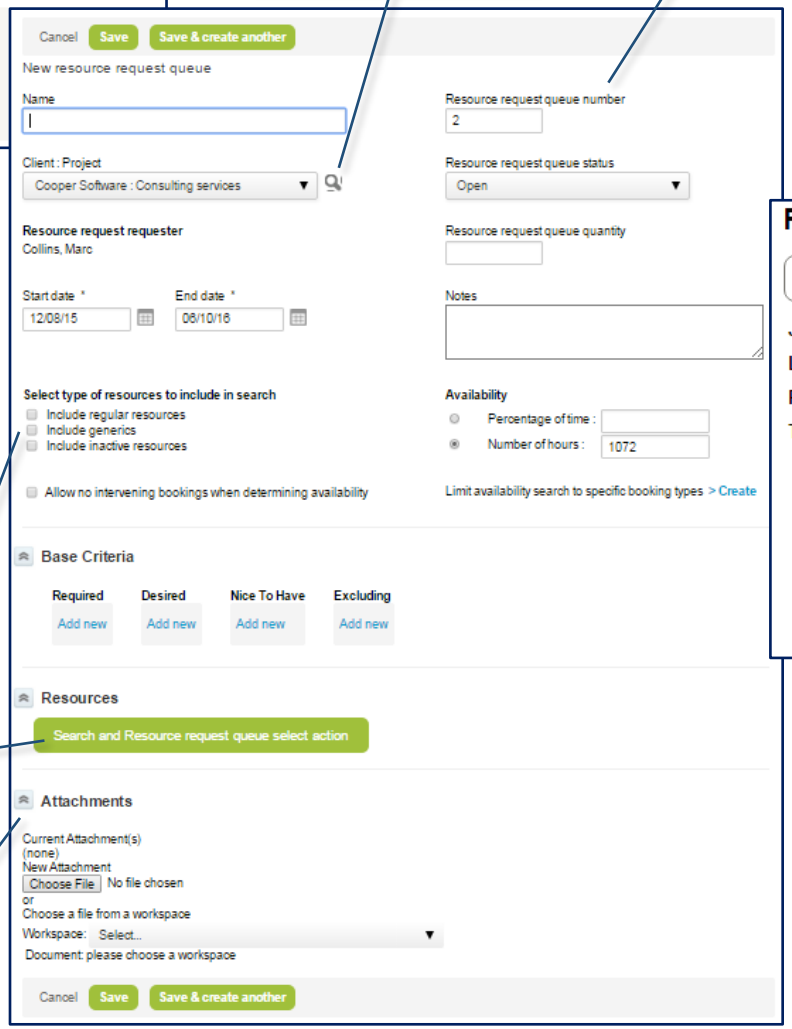
A Resource request queue is a search for a specific type of resource, for example, a search for 2 Spanish-speaking employees with CRM experience. Resource request queues are saved within Resource requests.



With a Resource request selected, click the **Create** button and click **Resource request queue.**

If the client and project you want aren't in the dropdown, you can click the **Find more...** icon to search for a client or project by name.

Name the Resource Request Queue, select a client and project, the number of resources you need, and the start and end dates for the booking.



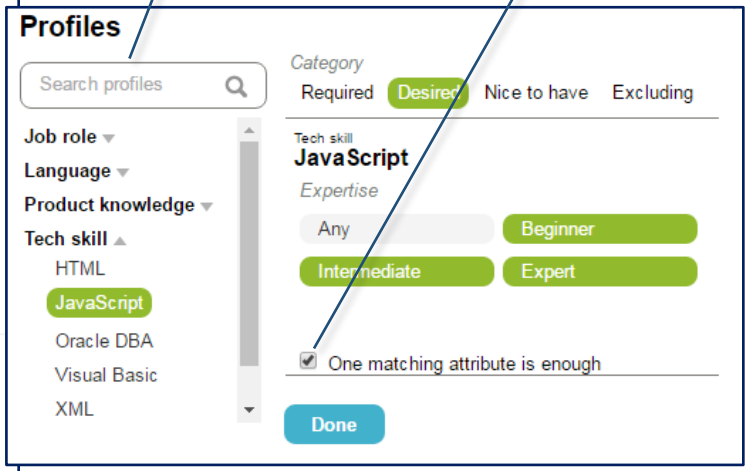
Note: Resource Request Queues can also be duplicated using bulk actions in a Resource Demand Request list.

Select the type of resources to include.

Once you've selected your desired search criteria, click the **Search and Resource request queue select action** to look for suitable candidates.

Add file such as résumés or statements of work here.

Select Required, Desired, or Nice to have job roles, skills, and preferences, or exclude characteristics you don't want in a resource.



Use the "One matching attribute is enough" checkbox to include resources who have any of the selected attributes, rather than all of the selected attributes. This feature is particularly useful when searching for employees with a minimum level of expertise or better.

When the "One matching attribute is enough" checkbox is selected, employees with only one matching attribute are treated as a 100% match.

To use this feature, first navigate to Administration > Application Settings > Resource Profiles. Clear the "Allow duplicates per resource" checkbox for each Profile type you would like to add a "One matching attribute is enough" checkbox to in Resource Request Queues.

Base Criteria Descriptions	
Required	A resource must have these features to be included in the request queue
Desired	A resource with these characteristics is ranked higher in the search results, but these characteristics aren't required to be included in the queue.
Nice to have	A resource with these characteristics is ranked lower than those with desired characteristics, but higher than a resource without them. These characteristics aren't required to be included in the queue.
Excluding	A resource with these characteristics will be excluded from the queue.

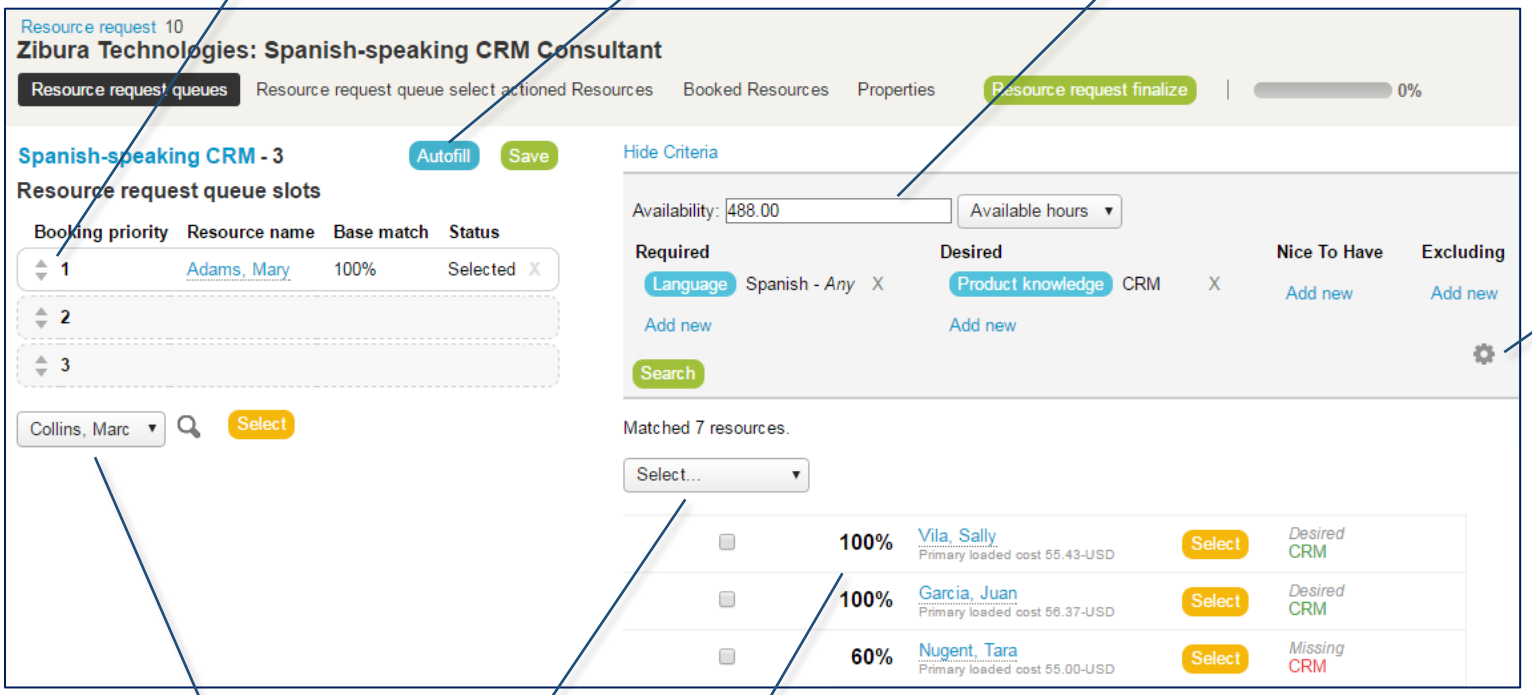
Edit Resource Request Queue Search Criteria and Select Resources

Click **Search and Resource request queue select action** on the previous page to open a form which allows you to select resources and tentatively book them.

You can replace the Booking Priority rating with a system which allows you to select your preferred candidates without prioritizing them in the Queue slots. To do this, contact OpenAir Support and ask them to enable the **Use recommendations instead of rankings for resource request queue prioritization** switch. Resources in the Queue slots which you would like to select can be marked with a star icon.

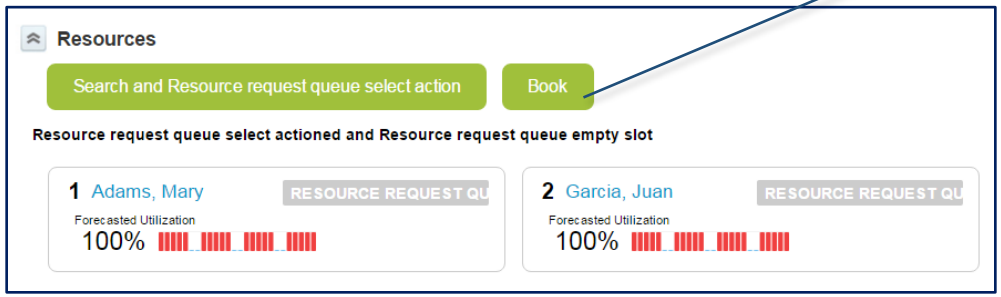
Click **Autofill** to automatically add resources to Resource request queue slots.

You can edit or refine your resource search criteria here. When you are ready to update the search, click **Search**.



Click the **Cog** icon to open a menu to customize employee details, select which search result columns to download, and download search results as CSV, HTML, or PDF files.

Click **Book** to tentatively book these resources to the project. A confirmation screen will ask you to confirm the bookings. Once confirmed, you can see these bookings by clicking **Booked Resources** at the top of the form.



Add specific resources directly to booking slots by selecting them in the dropdown list and clicking **Select**.

Select resources from the search results and click the dropdown list to add the resources to Resource Compare View.

A list of potential candidates and their suitability based on your search criteria appear here. Click **Select** to add them to a **Resource request queue slot**.

Delete a Resource Request or Resource Request Queue

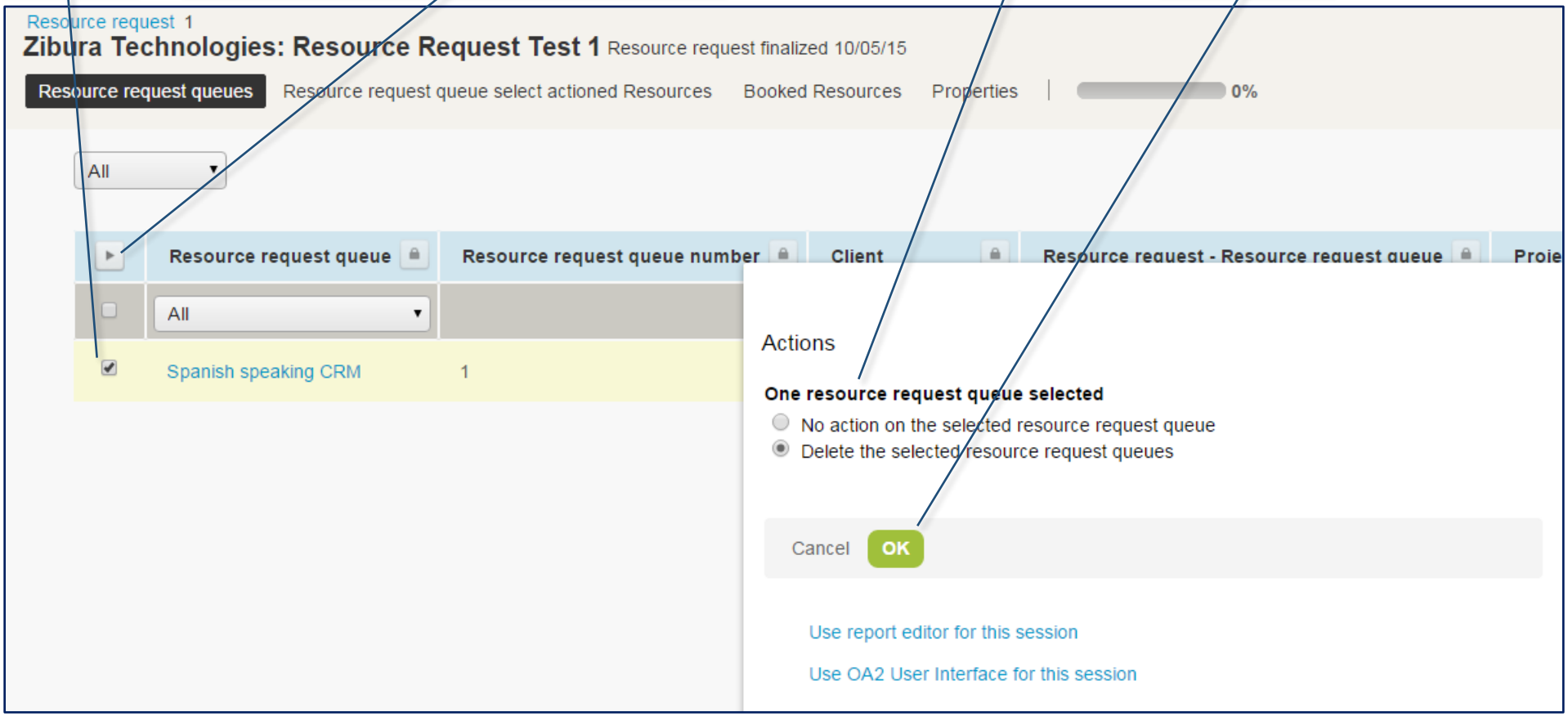
Click **Search and Resource request queue select action** on the previous page to open a form which allows you to select resources and tentatively book them.

Note: You cannot delete a Resource request which has any Resource request queues within it.

Select the Resource request or Resource request queue you would like to delete.

Click the **Run an action** icon to open a window with actions to perform on the selected request or queue.

Note: If the **Run an action** column isn't displayed, click the Cog icon, click Customize list view, click **Run an action** from the **Available** column in the List layout picker, and click **Add selected >**. Then click **OK**.

Select **Delete the selected resource requests** or **Delete the selected resource request queues**.

Click **OK**.