

2.16.4 Buying Team/Procurement Improvements

Fill with Local Purchase

1. Create a non-NFES request.
2. Check the Buying Team Request box.

Resource Ordering and Status System (ROSS) - *** PRACTICE v2.16.4.13 ***

File Administration Resource Incident Request Travel Status Window Help

[CA-KNF-003407] Wildland - test - Mary G

Select Item to Request

Catalog | Pre-Orders

Catalog: Supply

Category: NON-NFES Supplies

Item Name: []

Item Code: [] Keyword: []

Catalog Item	Code
!Not in Catalog Supplies	
CACHE, HT RADIO	
KIT, AIR ATTACK	
KIT, COMMAND REPEATER	
KIT, INCINET (CALIFORNIA ONLY)	
KIT, INCINET TRAILER (CALIFORNIA ON...	
KIT, LOGISTICS REPEATER	

There are no reminders for this catalog item. View

Select Features

Available Features: [] Requested Features: []

Select Inclusions and Exclusions

None Federal Only Host Agency Only
 Non-Federal Only State Only

Contractor Not Acceptable
 Portal-to-Portal Acceptable

Enter Request for !Not in Catalog Supplies

Quantity: 1 Block [1 - 99999] (SG) Default Block

Next Number: 7 View Issued #'s

Item Description: 10 cases of water

Need Date/Time: 07/23/2015 11:06 PST Track Request

Deliver To: Wildland - test - Mary G

Navigation Instructions: []

Financial Code: CFAA - CA FIRE ASSIST AGR

Special Needs: []

Reporting Instructions: []

Buying Team Request * 07/23/2015 13:26 PST

Incident Ordering Contact: []

Request Contact: CA-YICC (Dispatch) 530-842-3380 USFS

Configuration Option: Catalog Item with Configuration

Request(s) Created

Requested Item | Named Request

S	NR	Request	Requested Item	Code	Need Date/Time	Qty
	S-6		10 cases of water		07/23/2015 11:0...	10

Action Go To

Figure 1. Creating a non-NFES request for a Buying Team

3. Adjust the date and time to reflect when you will be giving the Buying Team that request.
4. Click + to create the request.
5. Go to the Pending Request screen.
6. Highlight S-6.
7. Click the Action button, and then click Fill with Local Purchase.
8. Click the arrow button until you see the Buying Team column.

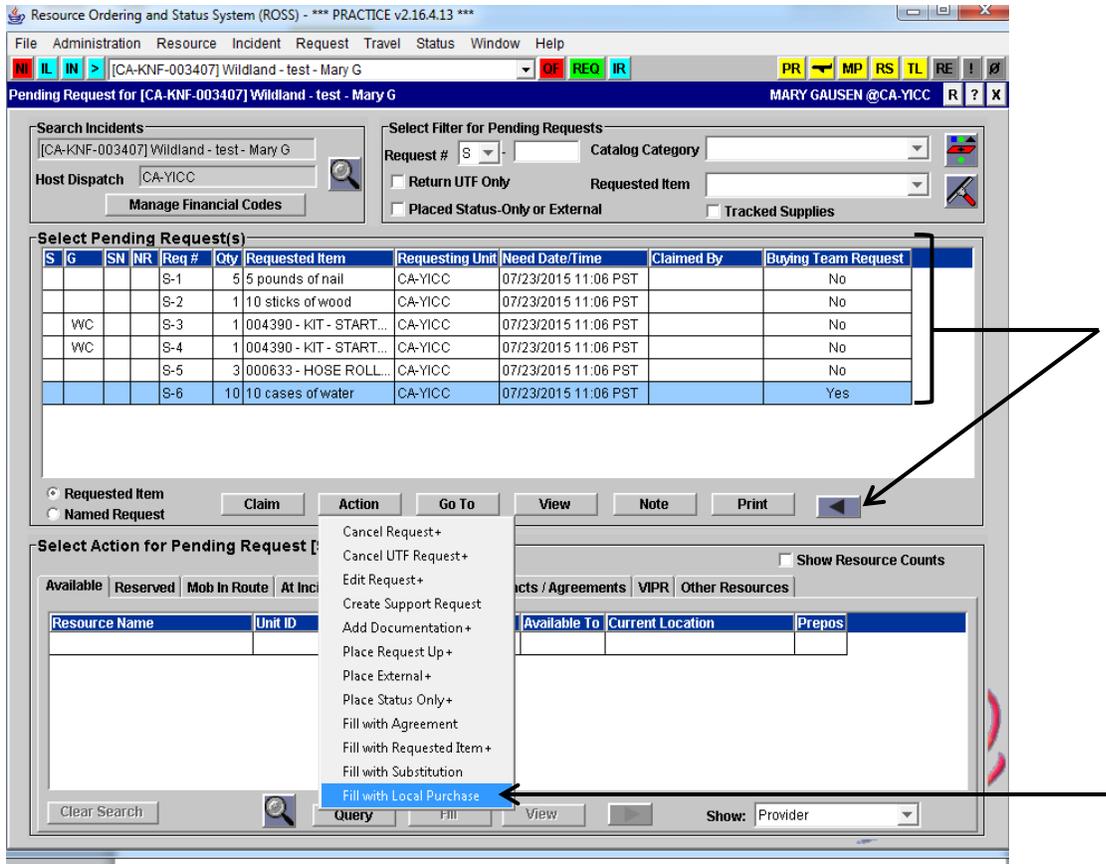


Figure 2. Edit Assignment option on the Request Status screen

9. Fill out all pertinent fields, and then click Save.
10. To add another vendor, click New.
11. When done, click Save, and then click OK.

Follow your agency business practices when completing Vendor information on the Fill with Local Purchase dialog box.

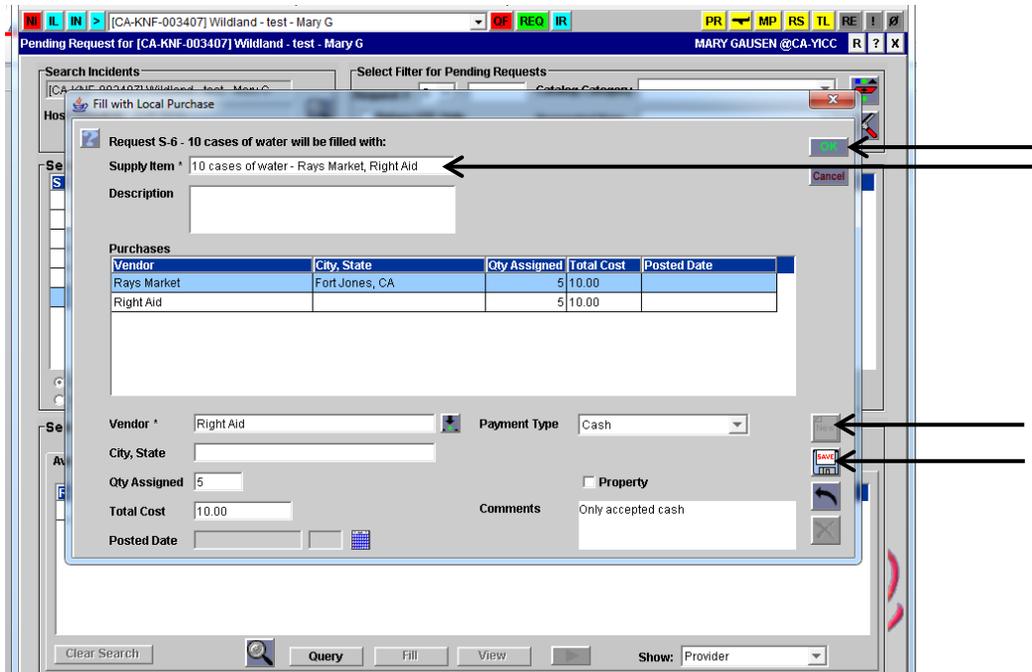


Figure 3. Completed Fill with Local Purchase dialog box

12. To set Travel, click the Track Request check box on the Fill Request dialog box.
13. On the Fill Request dialog box, complete the travel information as appropriate.

Request S-6 - 10 cases of water will be filled with 10 cases of water and will use Financial Code P5ER9I (0505).

Change Financial Code

Quantity Requested 10 Quantity Assigned * 10

Track Request If you want to set Travel, check the Track Request box.

Estimated Delivery Date 07/23/2015 14:40 PST

Travel

Set Travel to be Arranged

Set Travel ETD ETA

Mode of Travel

Set Travel (will have Itinerary)

No Travel Documented (Set At Incident)

Resource Needs Transportation

Assigning Contact *

Print Resource Order Form

Enter Documentation

Resource Counts

Figure 4. Selecting the Track Request check box

To download and print the Buying Team List Report

The Print button creates an Excel file of the Buying Team List Report, where you can manipulate the columns and rows to suit your reporting needs, save it to your computer, and print it at your convenience.

1. Return to Request Status screen.
2. Filter for catalog of your choice.
3. Highlight Incident Name, and then click the Print button.

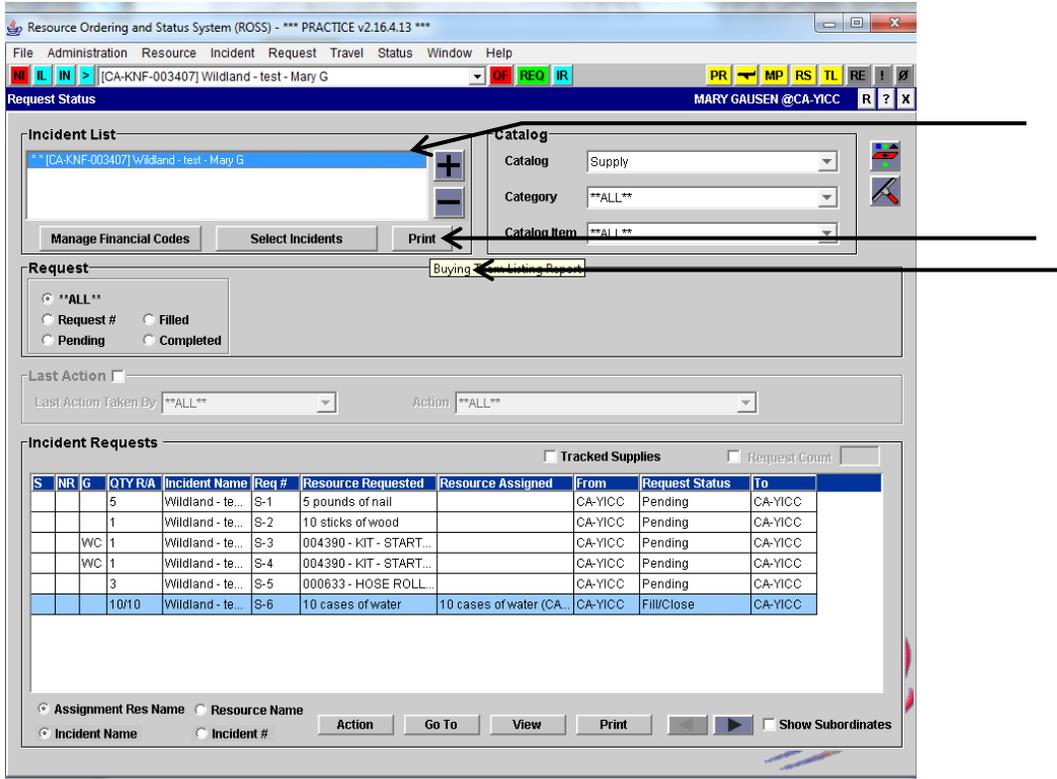


Figure 5. Printing the Buying Team List Report from the Request Status screen

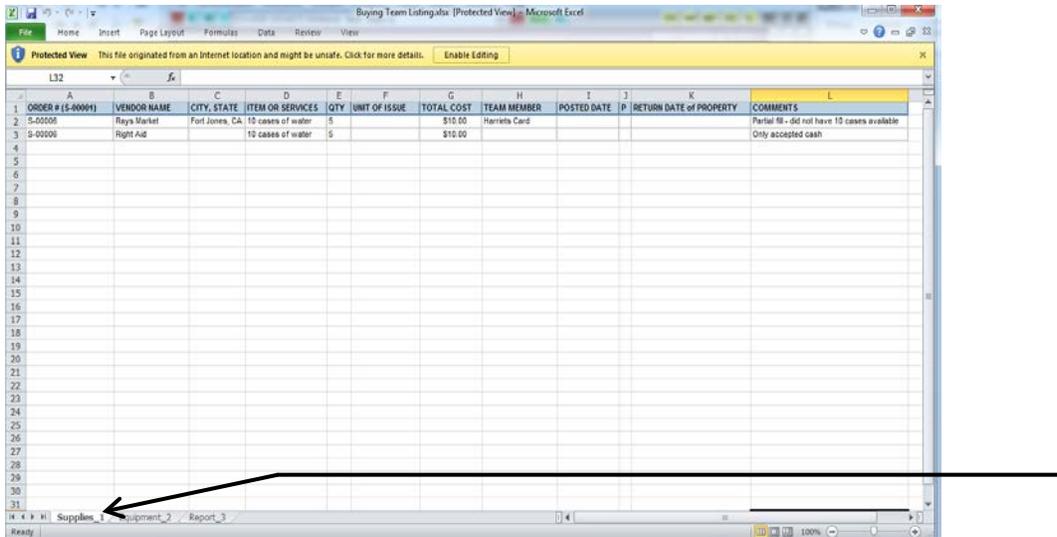


Figure 6. Buying Team List Report

Note the name on the tab. "Supplies" displays for Buying Team requests for Fill with Local Purchase resources, while "Equipment" displays for Buying Team requests for Fill with Agreement resources.

To change a request to a request for a Buying Team

If you did not check the Buying Team Request check box when the request was created, you can edit the request. This will allow you to view Fill with Local Purchase or Fill with Agreement information

1. On the Request Status screen, highlight the request.
2. Click the Action button, and then click Edit Request.

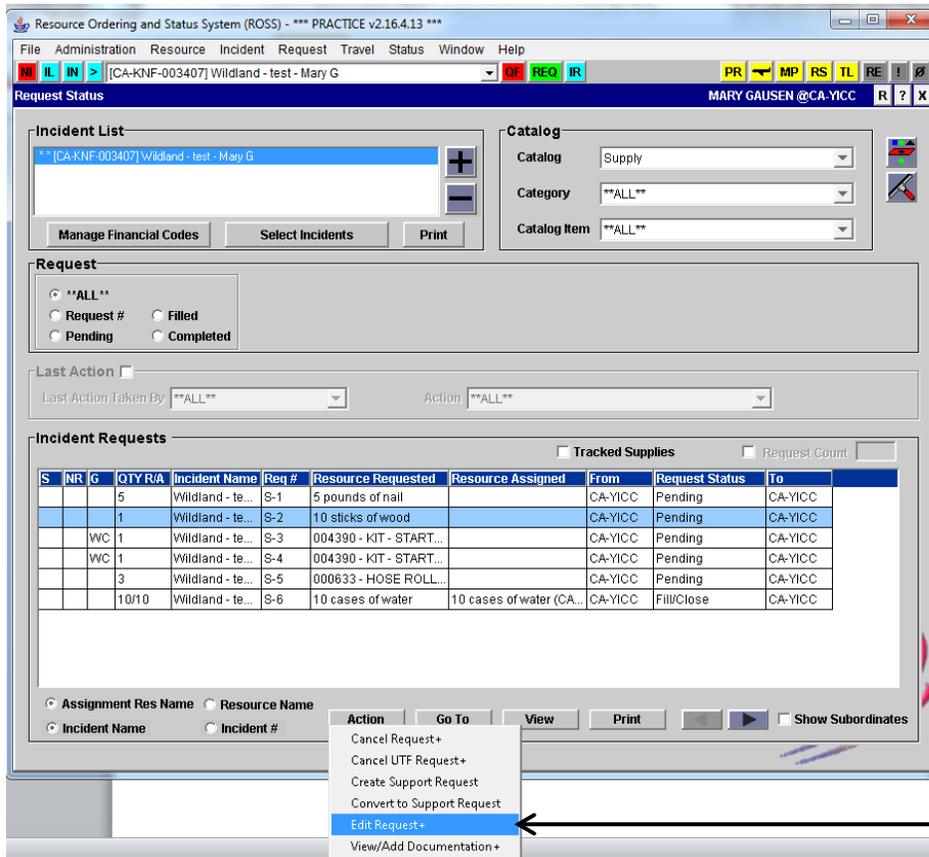


Figure 7. Changing an existing request to a request for a Buying Team

3. On the Edit Request dialog box, click to check the Buying Team Request check box, click Save, and then click Close.

Figure 8. Selecting the Buying Team Request check box on the Edit Request dialog box

Fill with Agreement

1. Create an equipment request on the New Request screen.

Be sure to check the Buying Team Request check box.

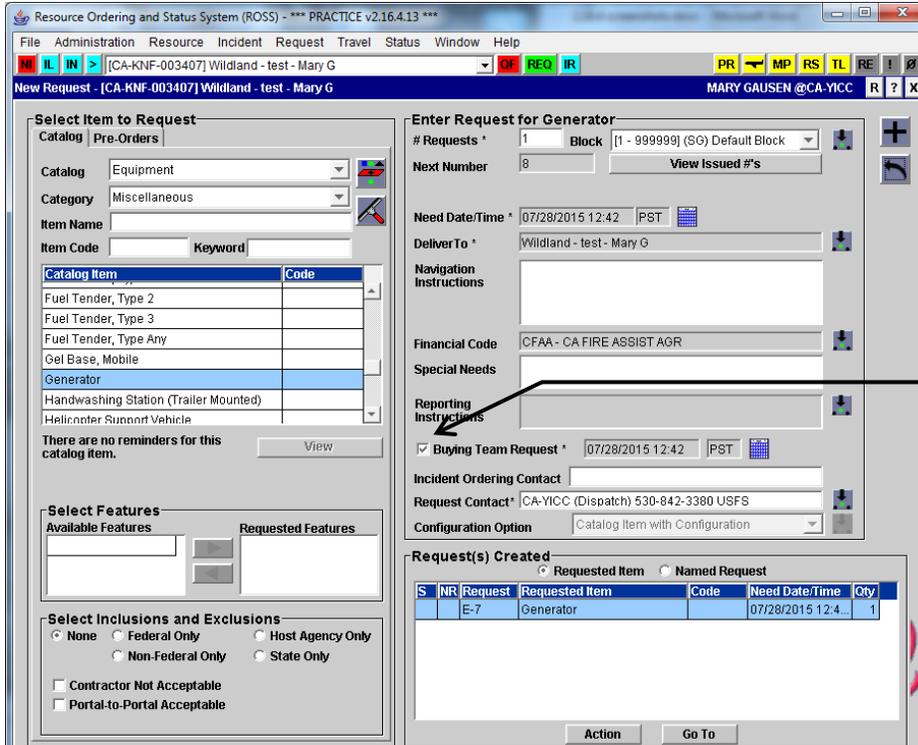


Figure 9. New Buying Team request

2. Go to the Pending Request screen and highlight the request.
3. Click the Action button, and then click Fill with Agreement.

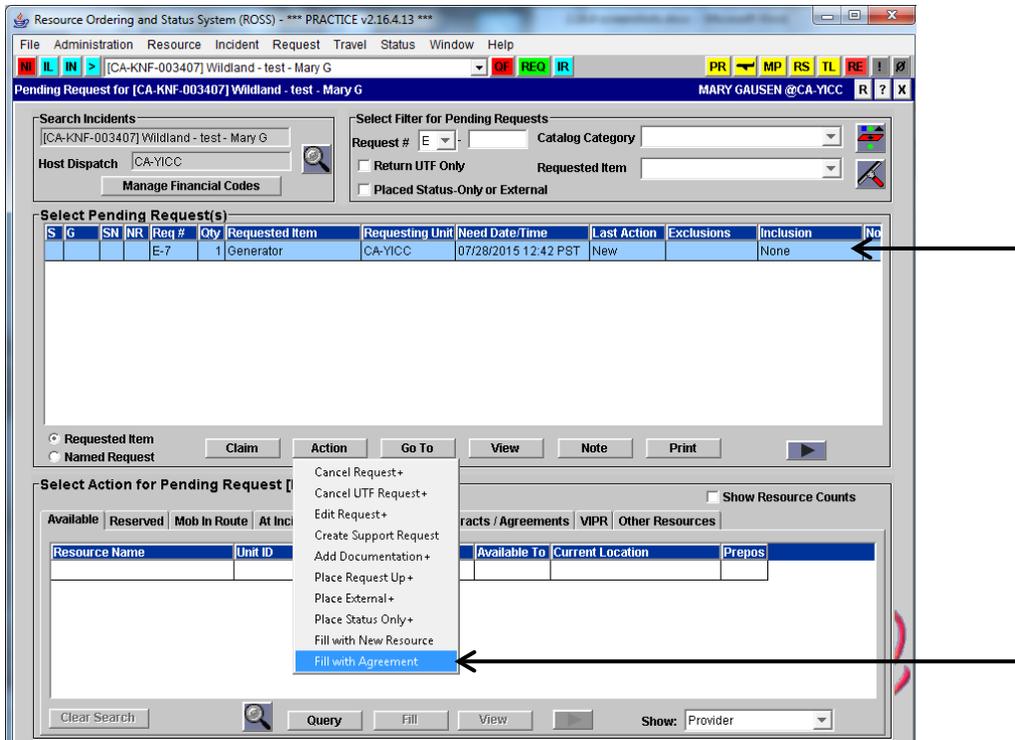


Figure 10. Fill with Agreement option on the Pending Request screen

4. On the Fill with Agreement dialog box, complete the Resource Name and Provider text boxes (required) and other fields, and then click OK.

Follow your agency business practices when completing Vendor information on the Fill with Agreement dialog box.

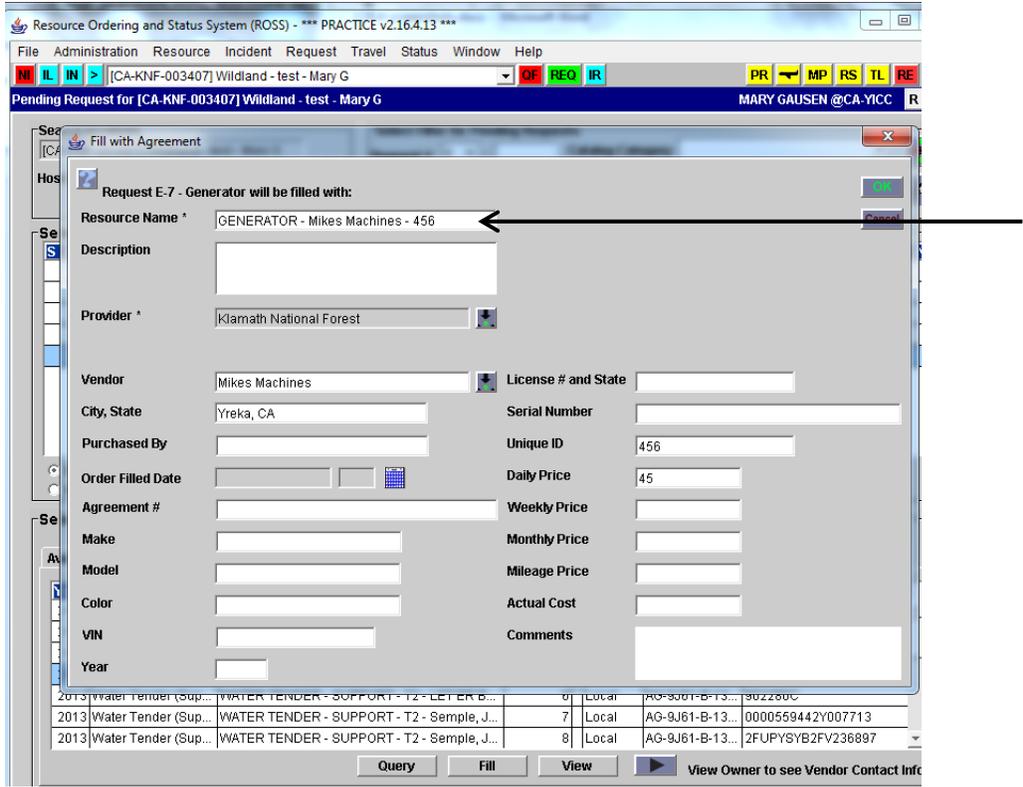


Figure 11. Fill with Agreement dialog box

- On the Fill Request dialog box, complete the travel information as appropriate.

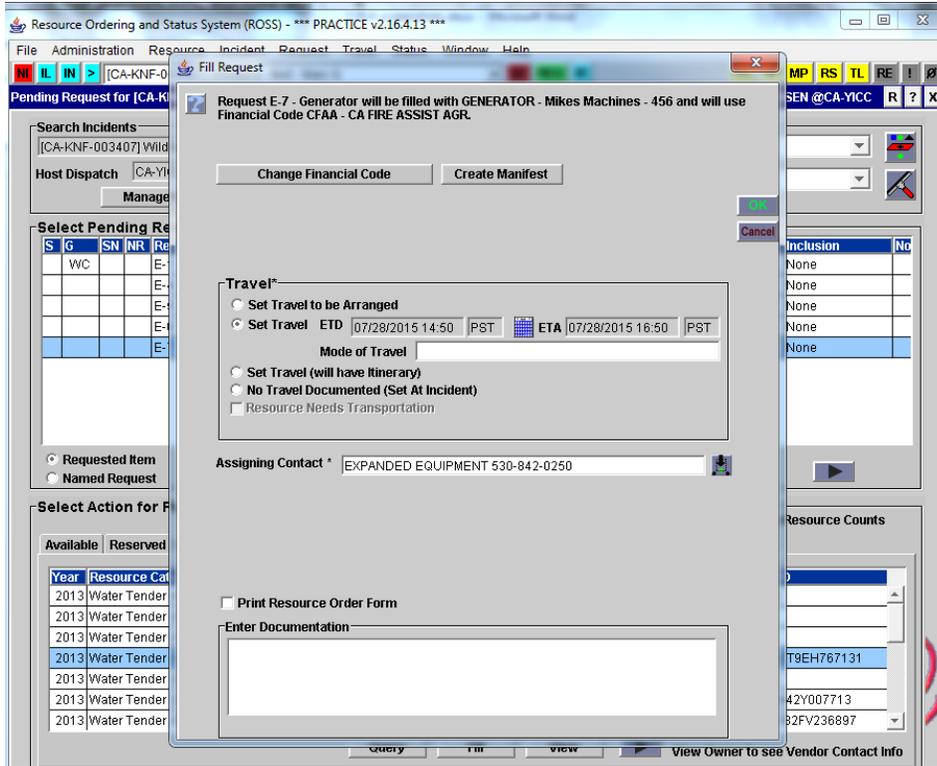


Figure 12. Completing the travel

6. [Download and print the Buying Team List Report](#)

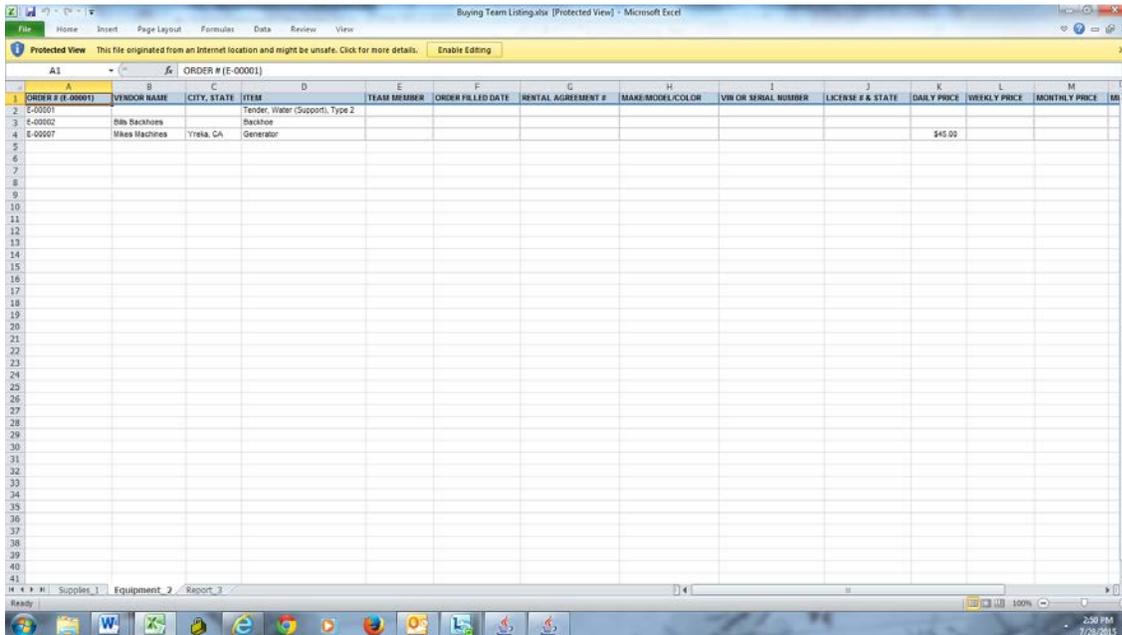


Figure 13. Sample Buying Team Listing for Equipment request

To view or edit the Assignment Resource

1. On the Request Status screen, highlight the request.
2. Click the Action button, and then click Edit Assignment.

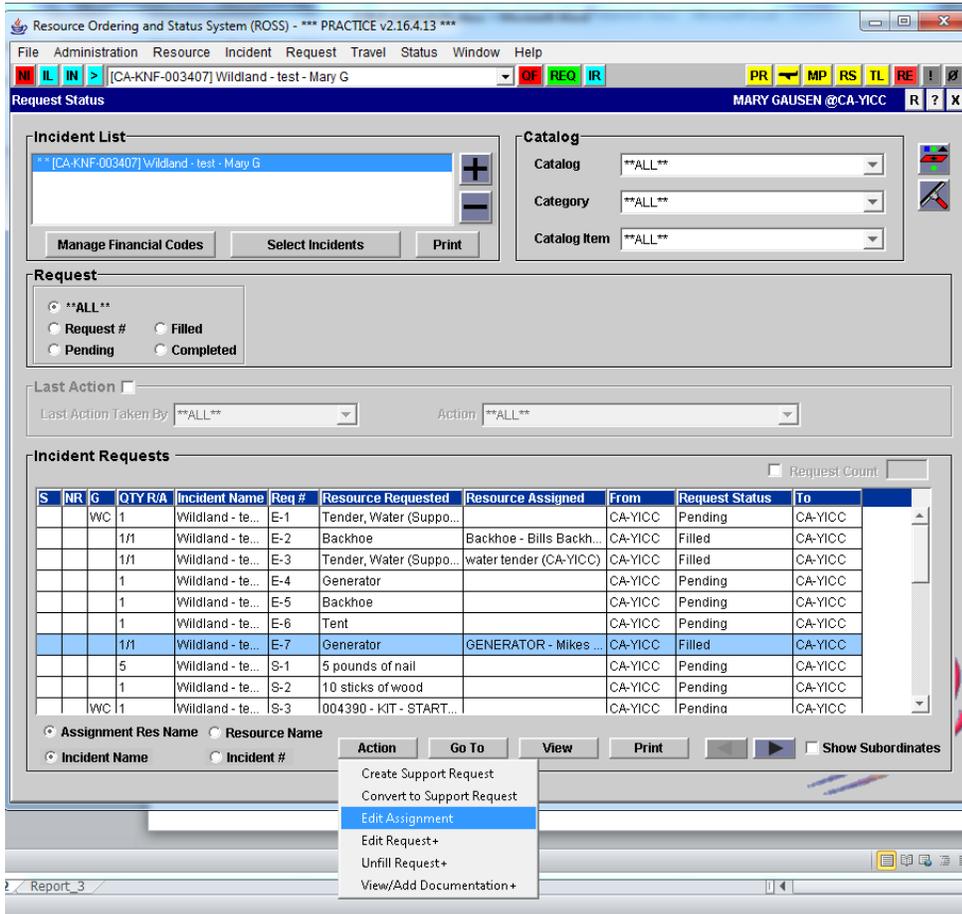


Figure 14. Edit Assignment option on the Request Status screen

3. On the Edit Assignment dialog box, click the Edit button.

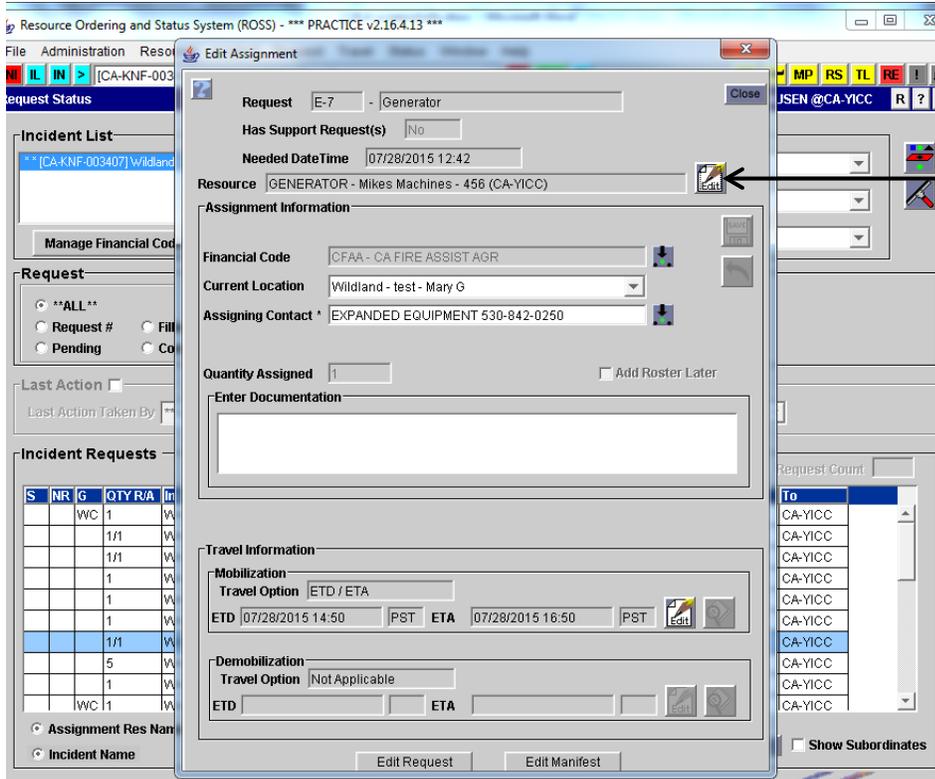


Figure 15. Editing the assignment resource

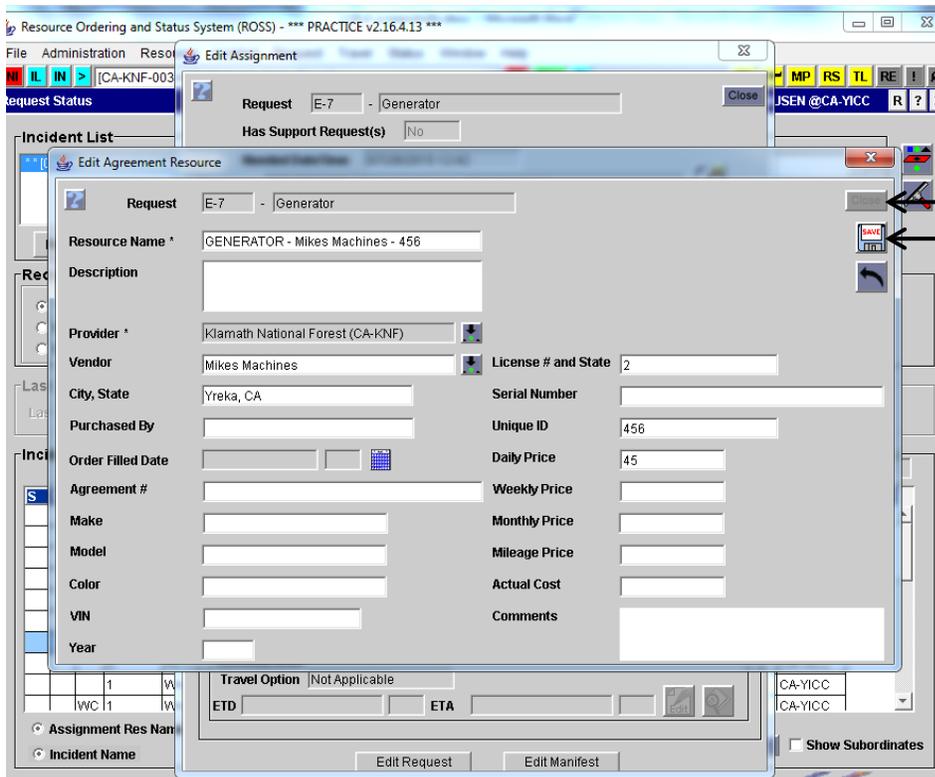


Figure 16. Viewing or changing the assignment resource

4. On the Edit Assignment Resource dialog box, view or edit the information as needed.
5. To save changes, click Save, and then click Close.

Key Points

- For the information to show up on the Resource Order Form, you must complete the vendor, unique ID, and any other relevant information to the Resource Name field for Fill with Agreement and in the Requested Item field for Fill with Local Purchase.
- Follow your agency business practices when completing vendor information. This functionality has not changed.
- When using the Fill with Agreement and you enter the VIN and Year of the piece of equipment that matches a VIPR resource, a warning will appear stating there is a match. It will not prevent you from filling that request.
- If you forgot to check the Buying Team Request check box or you want to remove it from the request, go to Edit Request and correct it there.
- The only way the request will show up on the Buying Team List Report is to be sure to check the Buying Team Request box.
- If you need to edit the information on a Fill with Agreement or Fill with Local Purchase request, go to Edit Assignment and click on the edit box.
- When viewing a request that was Fill with Local Purchase, there is a new tab called Local Purchase. The vendors and other fill information will show on this tab.

The screenshot shows the 'View Request' dialog box with the following fields:

Request Information

Incident/Request # [04-A11-000003] Mai [9-1] Special Needs []

Requested Item Cases of water

Unit of Issue [] Request Contact GV-4A1 (Dispatch) 720-123-4567

Status Filled Buying Team Request No

Quantity Requested 20 Assigned 15 Incident Ordering Contact []

Entered Date/Time 09/23/2015 17:16 EST Claimed By []

Need Date/Time 09/23/2015 14:15 EST Note []

Financial Code [] Track Yes

Host ProvHost GV4A11

Parent Request []

Replacement Request No

View []

Navigation Bar: History | Assignment | Documentation | Inclusion/Exclusions | Delivery Location | Features | **Local Purchases** ←

Vendor	City, State	Qty Assigned	Total Cost	Posted Date
Harrys H2O		10		
Willlys Water		5		

Vendor Harrys H2O Payment Type Cash

City, State []

Qty Assigned 10 Property No

Total Cost [] Comments []

Posted Date [] []

Figure 17. Local Purchase tab on the View Request dialog box