ROSS Buying Team Procurement Tips

Description: This Tips and Ticks document describes how to manage Buying Team procurement actions in various scenarios as well as working with Buying Team list reports

Contents

Fill with Local Purchase

1. At the New Request window, create a NON-NFES Supplies request. ***Catalog*** *= Supply,* ***Category*** *= NON-NFES Supplies, Click Filter button* , ***Item Description*** *= 10 cases of water.*

2. Check the **Buying Team Request** box.

3. Click **add** button to create the request.

4. To go to the Pending Request screen. Click **Go To** button Go To and select **Pending Request**.

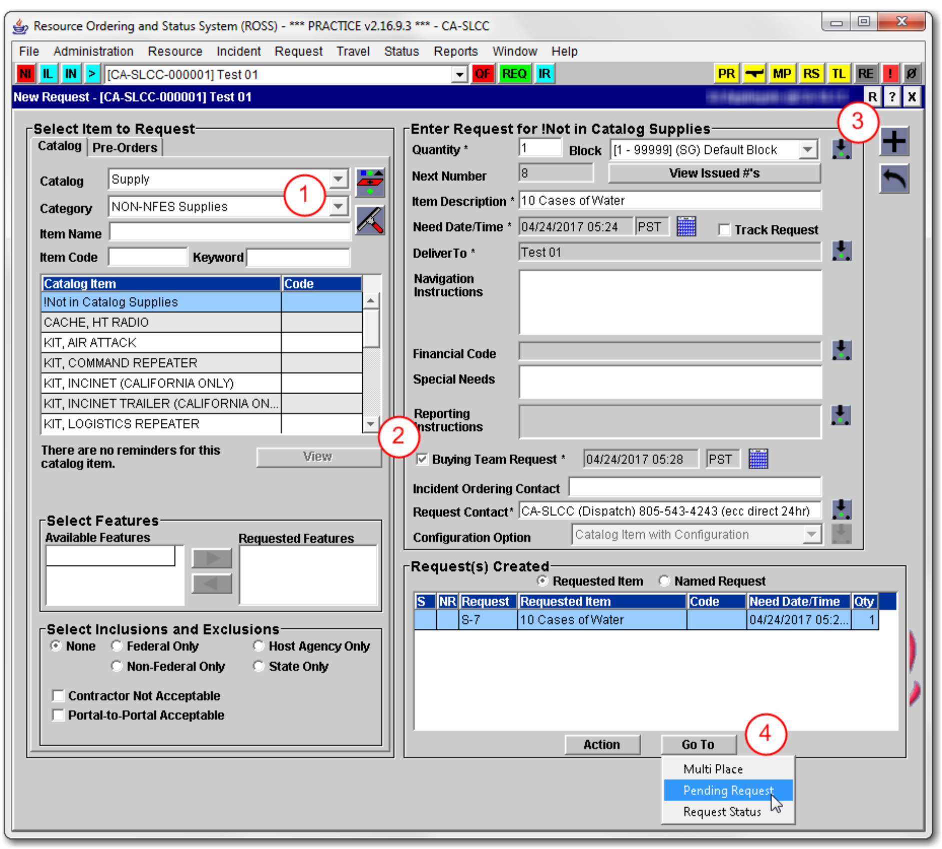

Figure 1 Creating a non-NFES request for a Buying Team at New Request window

5. Highlight your request.

6. Optional, click the **Next** button until you see the **Buying Team Request** column.

7. Click the **Action** button Action, and select **Fill with Local Purchase**.

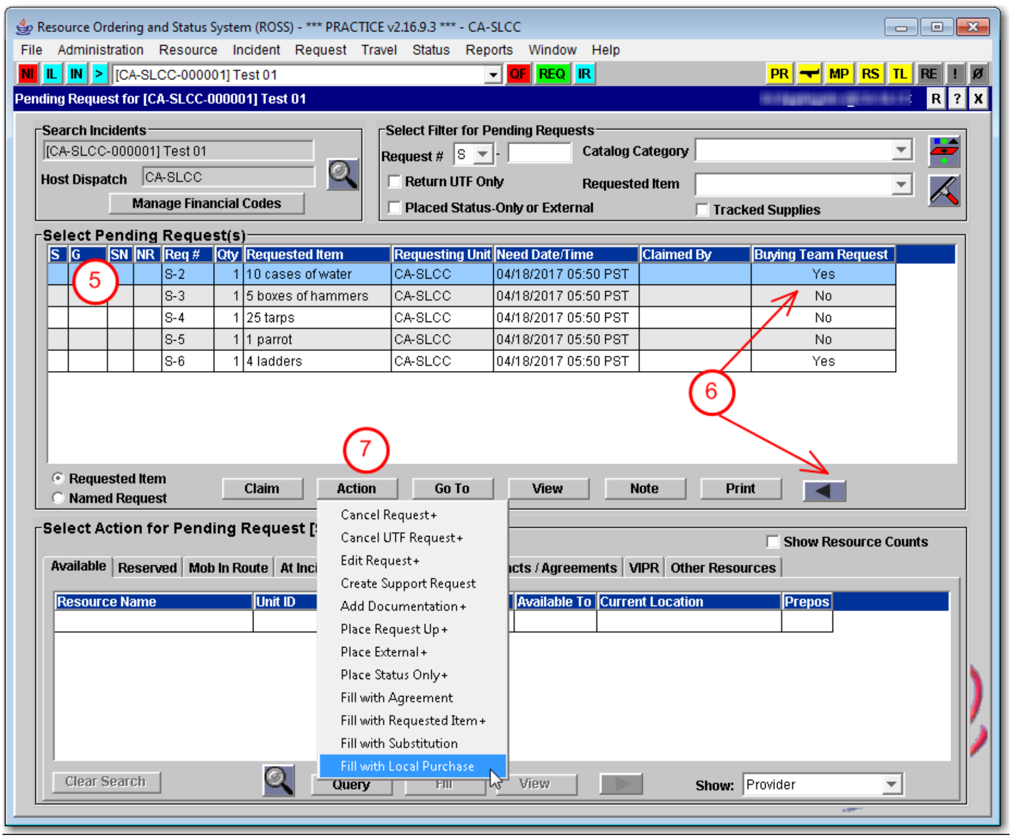

Figure 2 Edit Assignment option on the Request Status window

8. Fill out all pertinent fields. (*Follow your agency business practices when completing Vendor information on the Fill with Local Purchase dialog box).*

9. Optional; to add another vendor, click **New** button

10. When done, click **Save button**.

11. Click **OK** button . and the Fill Request travel window will open.

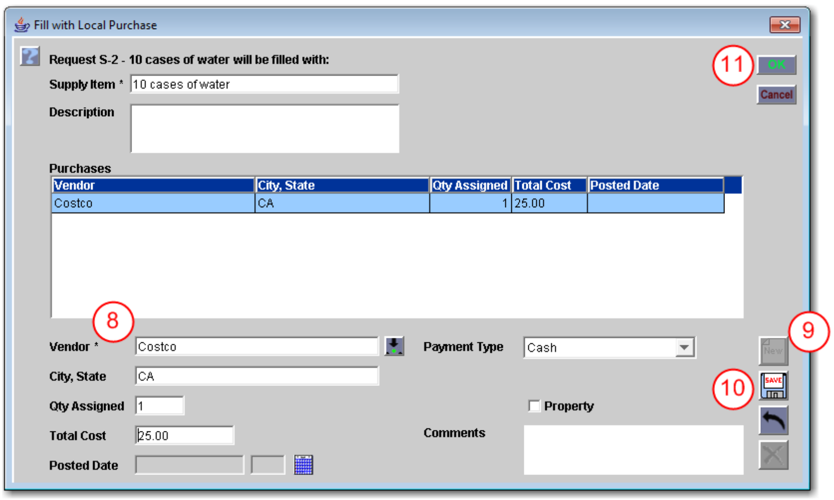

Figure 3, Complete dialog boxes on Fill with Local Purchase window.

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 Fill Request travel information as appropriate.

14. Click the **OK** button OK.

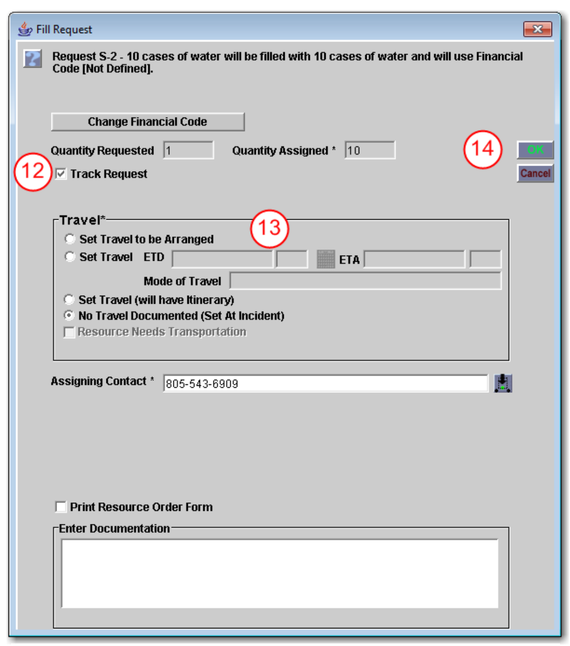

Figure 4, Fill Request travel dialog window

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.

15. Return to Request Status screen.
16. Filter for catalog of your choice.
17. **Highlight** Incident Name.
18. Click the **Print** button Print

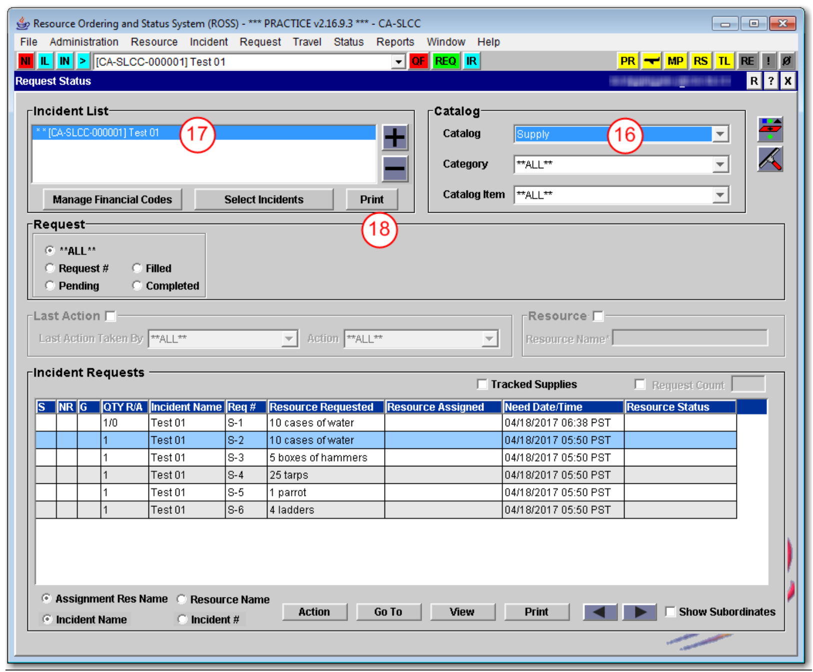

Figure 5, Printing the Buying Team List Report from the Request Status screen

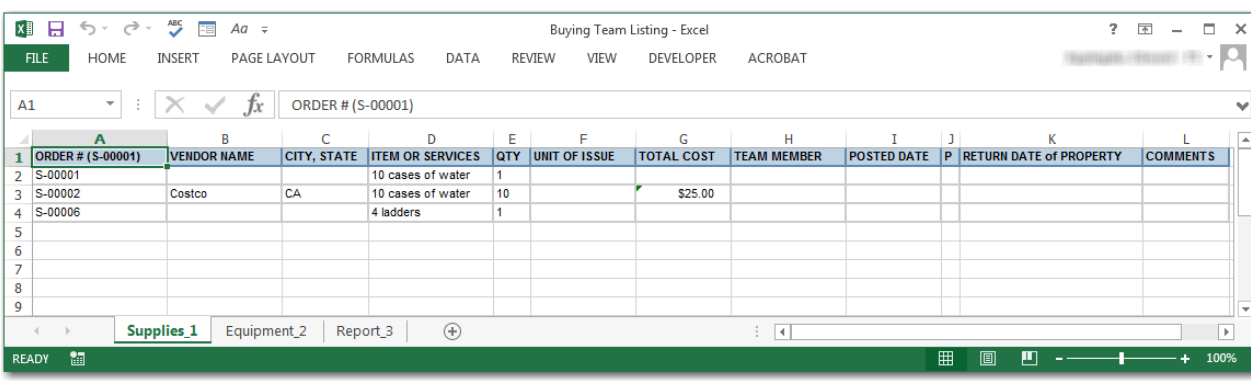

Figure 6, Buying Team List report.

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 creating the request, you can change an existing request to a Buying Team request at the Edit Request window. This will allow you to view Fill with Local Purchase or Fill with Agreement information later.

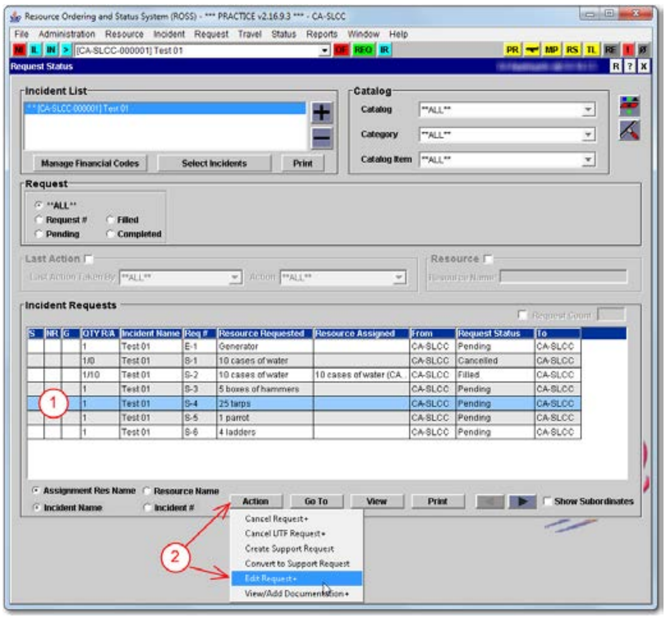

Figure 7; Change an existing request to a Buying Team Request.

1. On the Request Status screen, highlight the request.

2. Click the Action button Action, and select Edit Request.

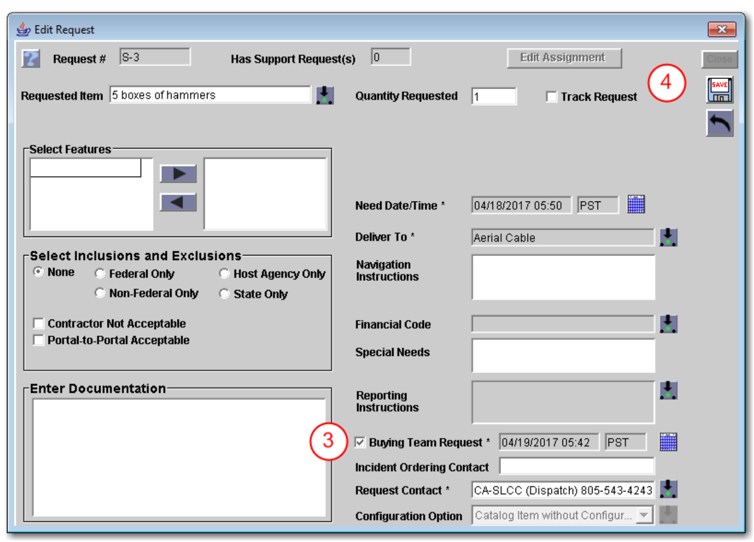

Figure 8, Selecting the Buying Team Request check box on the Edit Request dialog box.

3. On the Edit Request dialog box, click to check the **Buying Team Request** check box,

4. click the **Save button** Button, and then click the **Close button** Close.

Fill with Agreement

1. Create an equipment request on the New Request screen. *Be sure to check the **Buying Team Request** check box.*

2. Click the **Go To** button Go To and select **Pending Request**.

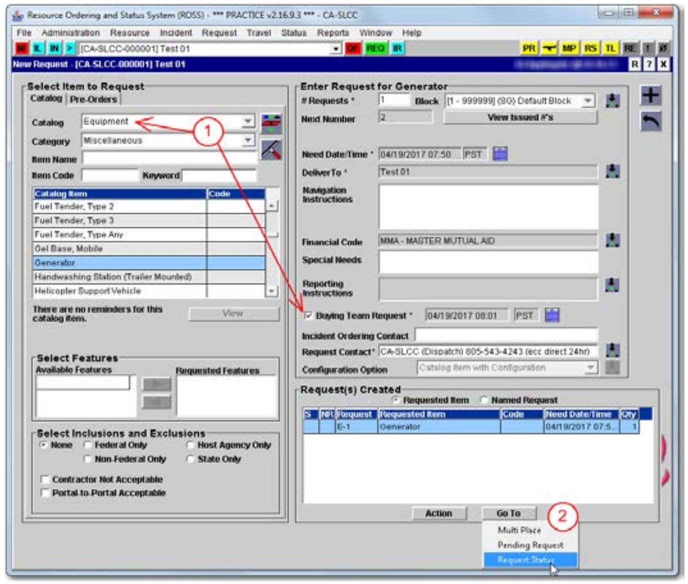

Figure 9, New Buying Team request.

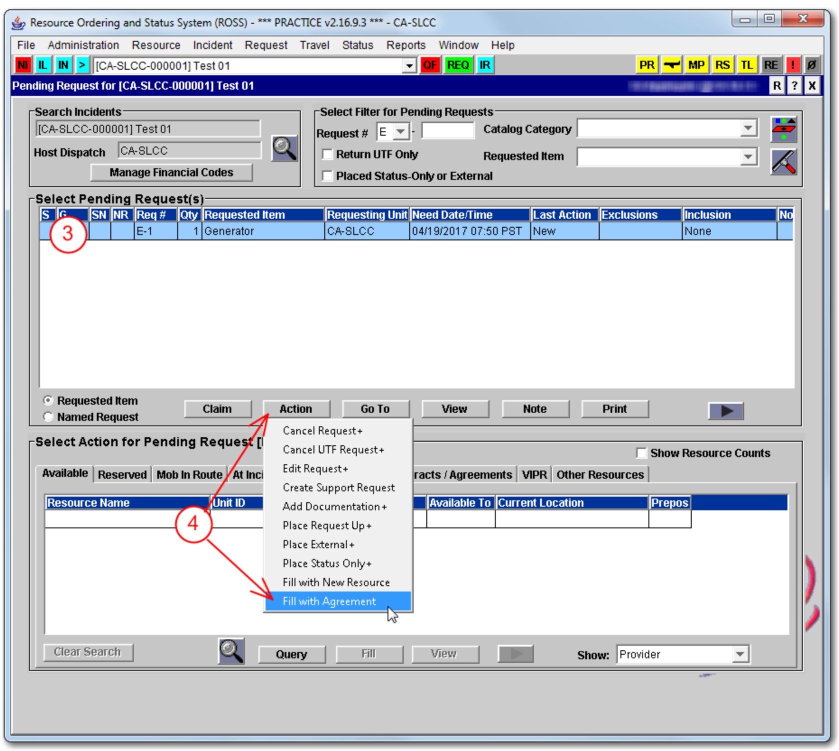

Figure 10, Fill with Agreement option on the Pending Request window

3. Highlight the request.

4. Click the **Action** button, Action and select **Fill with Agreement**.

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

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

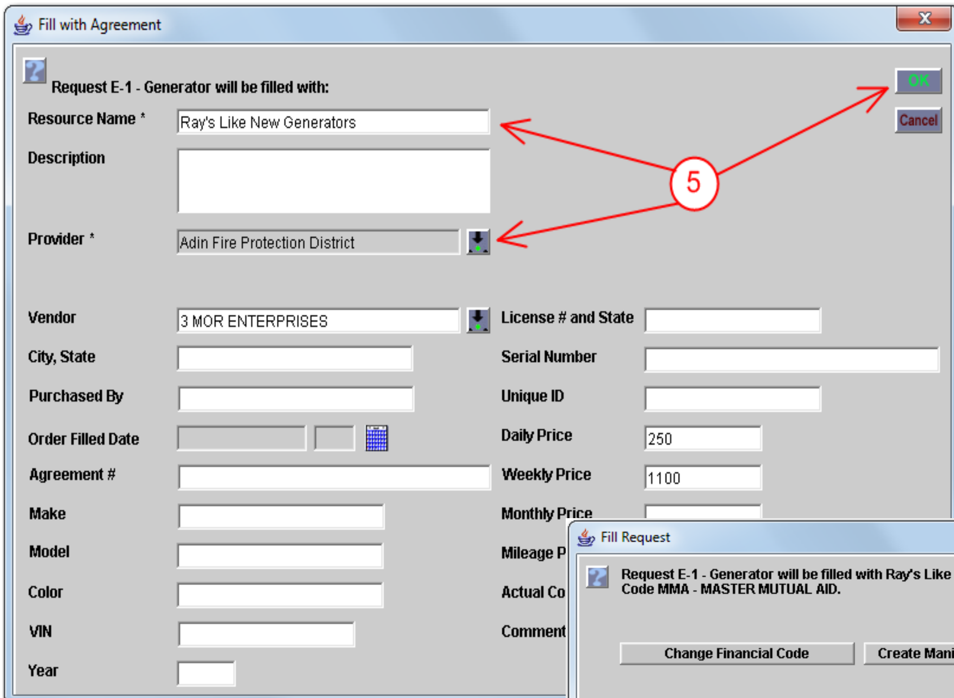

Figure 11, Fill with Agreement dialog window.

6. On the Fill Request dialog box, complete the **Travel** information and ckick the **OK** button

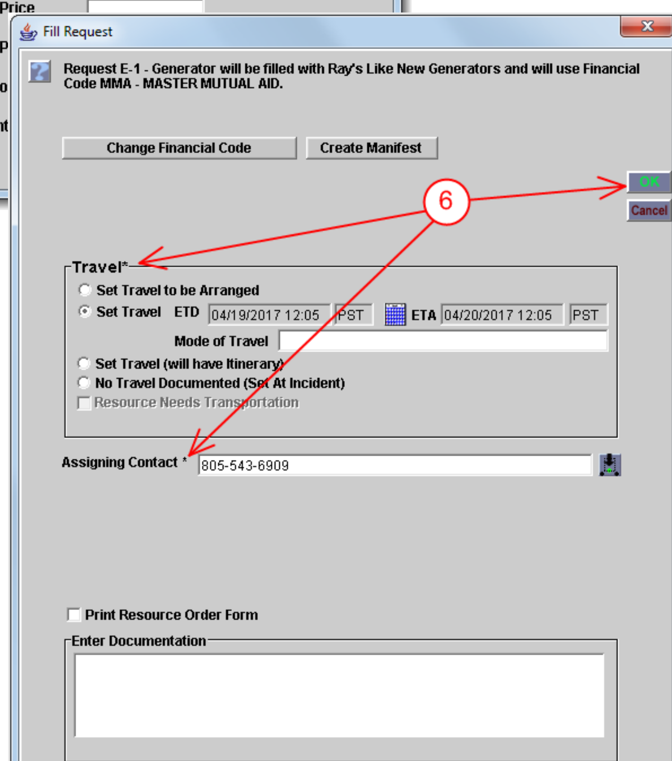

Figure 12, Fill Request Travel window.

7. At the Request Status screen set the **Catalog** to **Equipment or all**.

8. **Highlight** Incident Name.

9. Click the **Print** button Print

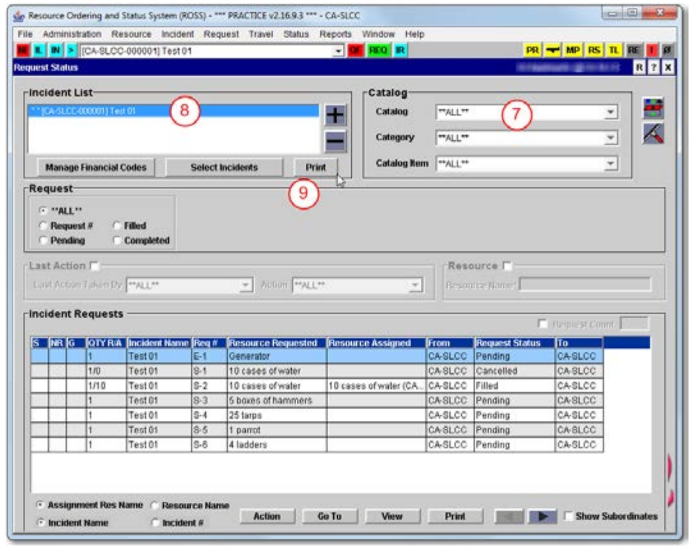

Figure 13, Print Buying Team Listing.

To view or edit the Assignment Resource

1. On the Request Status screen, **highlight** a *filled* request.

2. Click the **Action** button Action then click **Edit Assignment**.

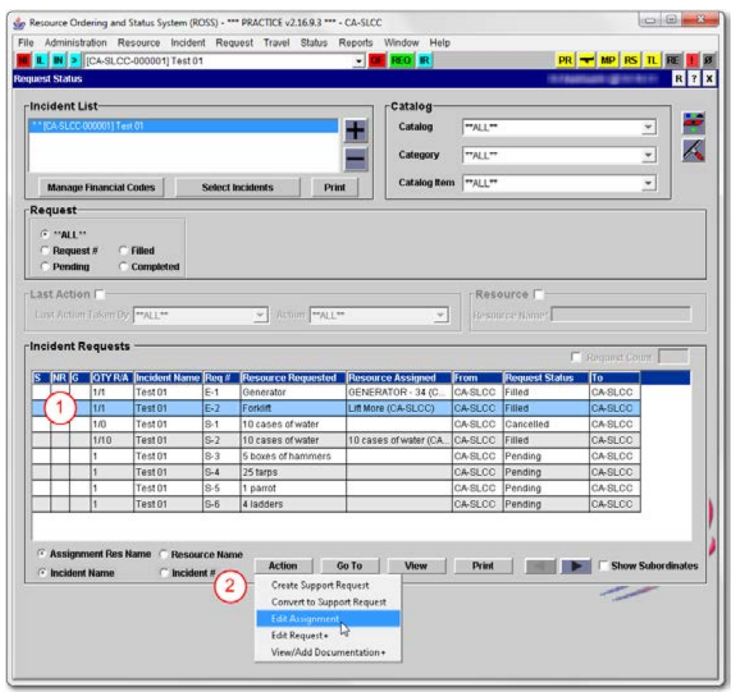

Figure 14, Edit Assignment option on the Request Status screen.

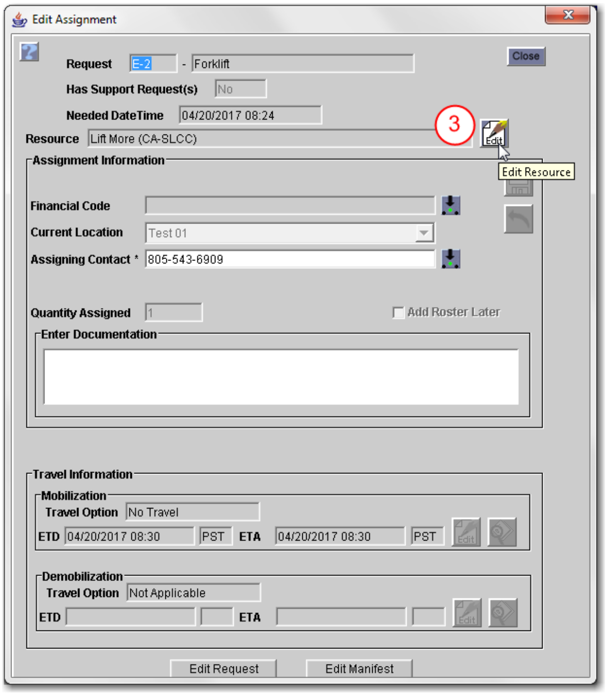

Figure 15, Edit Assignment window.

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

4. On the Edit Assignment Resource dialog box, view or edit the information as needed.

5. Click the **Save** , and then the **Close** buttons.

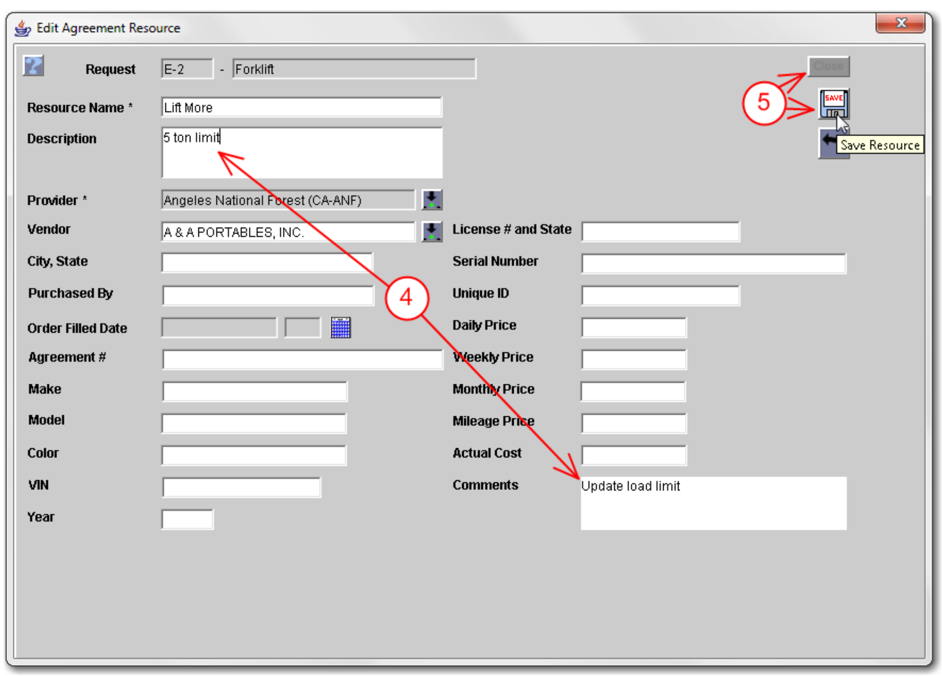

Figure 16, Edit or view window.

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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 vendor(s) and other fill information will show on this tab.

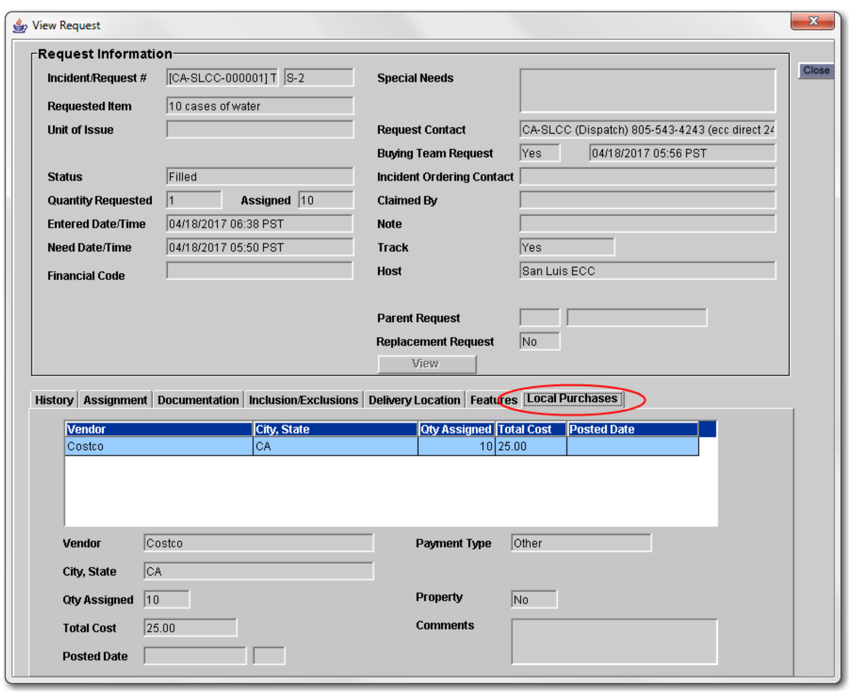

Figure 17, Local Purchase tab on View Request window.