



# **Advanced Unit 2 – Pre-Orders**

**ROSS Dispatch Training Student Workbook  
Release 2.16.12**

For ROSS Steady State  
Operations & Maintenance



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**OBJECTIVES**

Upon completion of this unit, the trainee will be able to:

1. Create and edit a Pre-Order.

**ADVANCED UNIT 2: PRE-ORDERS**

**2.1 Objectives**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	2.1 Objectives	<b>Refer to Slide ROSSD-SL-ADVANCED-02-01 (Pre-Orders).</b> <b>Refer to Slide ROSSD-SL-ADVANCED-02-02 (Objectives).</b>

**2.2 Overview**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	2.2 Overview	

**2.3 Pre-Orders Screen > Pre-Orders Panel**

☑	Topic	Notes
☐	2.3 Pre-Orders Screen > Pre-Orders Panel	<ul style="list-style-type: none"> <li>• Accessed by Resource menu.</li> <li>• Screen used to create Pre-Orders, which are pre-established groupings of catalog items and their quantities used for expedited resource ordering.</li> <li>• A Pre-Order is different from a configuration in that:                             <ul style="list-style-type: none"> <li>– It does not have a 'root' catalog item.</li> <li>– When ordered, it results in separate requests for each item (versus subordinate requests for a configuration).</li> </ul> </li> <li>• Pre-Orders display for selection on Pre-Orders tab of New Request screen.</li> <li>• Catalog drop-down list.</li> <li>• Radio buttons.</li> </ul>

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	2.3 Pre-Orders Screen > Pre-Orders Panel (continued)	<ul style="list-style-type: none"><li>• Grid columns.</li> <li>• New button and New Pre-Order dialog box.<ul style="list-style-type: none"><li>– Copy Pre-Order check box</li> <li>– Name.</li> <li>– Purpose.</li> <li>– Available Nationally check box.</li></ul></li> <li>• Edit button.</li> <li>• Delete button.</li></ul>

☑	Topic	Notes

**2.4 Pre-Orders Screen > Pre-Order Contents Tab**

☑	Topic	Notes
☐	2.4 Pre-Orders Screen > Pre-Order Contents Tab	<ul style="list-style-type: none"> <li>• Used to add/remove catalog items from selected Pre-Order.</li>   <li>• Alias catalog items can be added to a Pre-Order.</li>   <li>• All Items panel.                             <ul style="list-style-type: none"> <li>– Catalog tab – Can filter by catalog and category.</li>   <li>– Filter tab – Provides additional filter criteria.</li> </ul> </li>   <li>• Pre-Order Contents panel.                             <ul style="list-style-type: none"> <li>– Grid columns.</li>   <li>– Save button – Saves changes to Quantity.</li> </ul> </li> </ul>

☑	Topic	Notes

**2.5 Pre-Orders Screen > Pre-Order Organizations Tab**

☑	Topic	Notes
☐	2.5 Pre-Orders Screen > Pre-Order Organizations Tab	<ul style="list-style-type: none"> <li>• Only applicable to Pre-Orders that are <u>not</u> 'Available Nationally'.</li> <li>• Used to specify dispatches with access to selected Pre-Order.</li> <li>• Filter for Dispatch Organizations panel.                             <ul style="list-style-type: none"> <li>– Filter criteria.</li> <li>– Grid columns.</li> </ul> </li> <li>• Organizations with Access to Order panel.</li> </ul>

<input checked="" type="checkbox"/>	Topic	Notes
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**2.6 Objectives Review**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	2.6 Objectives Review	<b>Refer to Slide ROSSD-SL-ADVANCED-02-03 (Objectives Review).</b>

**2.7 Practice Session**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	2.7 Practice Session	