Pre-Orders - creating lists of needed resources

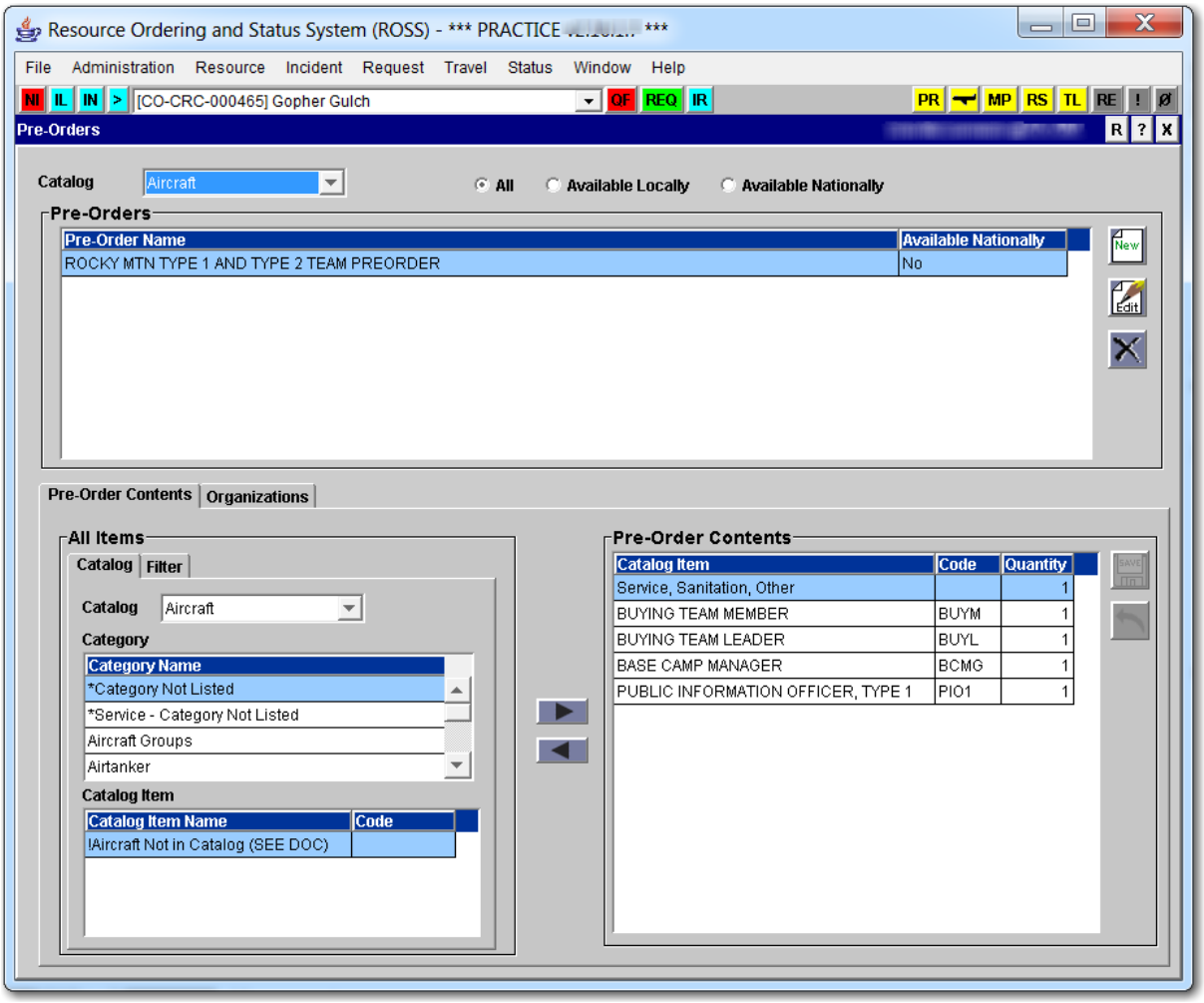
This guide explains how to create and manage pre-orders. Topics include:

- Working with Pre-Orders
- Exploring pre-orders in detail.

To access the Pre-Orders screen

- On the **Resource** menu, click **Pre-Orders**.

Pre-Orders screen



To create a pre-order

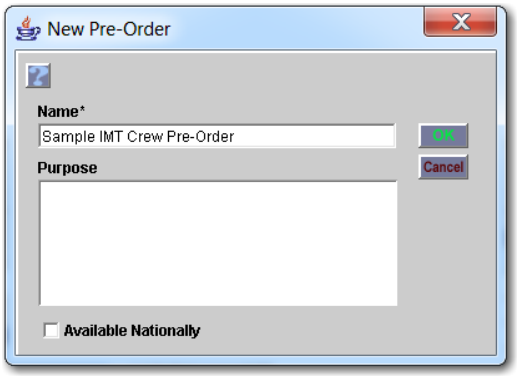
Pre-orders can not contain both NFES and non-NFES catalog items. You must create a separate pre-order for non-NFES catalog items.

1. On the **Pre-Orders** screen, click the **Catalog** drop-down arrow, select the **Catalog** of your choice, and then click the **New** button.
2. On the **New Pre-Order** dialog box in the **Name** text box, type the **Name of the New Pre-Order**.
3. In the **Purpose** text box, type a **Description** and/or **Purpose** of the new pre-order.
4. To make the Pre-Order available nationally, click the **Available Nationally** check box.

   Selecting the Available Nationally check box allows all dispatch offices in ROSS to access the pre-order! To allow only specific dispatch offices to use the pre-order see, "To allow access to the pre-order by another organization."

5. When finished completing the **New Pre-Order** dialog box, click **OK**.

The following graphic shows the New Pre-Order dialog box.



To filter for and then add a resource item to the pre-order using the Filter tab

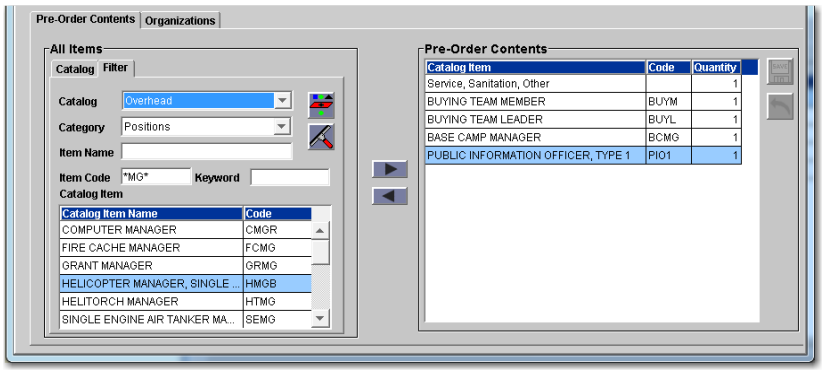
ROSS creates requests in sequential order based on the sequential order of those resource items added to the pre-order.

1. On the **Pre-Order Contents** tab under **All Items**, click the **Filter** tab.
2. Click the **Catalog** drop-down arrow, and then select the **Catalog** of your choice.
3. **Category**, click the **Category Name** of your choice, and then click the **Filter** button.

   To further narrow your search, you may also filter by Item Code and/or by Keyword.

4 Under **Catalog Item**, click the **Catalog Item Name** of your choice, and then click the **Add** button.

The following graphic shows the Filter tab under All Items. In this example, the Item Code is also added to the filter criteria.



To add resource items to the pre-order using the Catalog tab

ROSS creates requests in sequential order based on the sequential order of those resource items added to the pre-order.

1 On the **Pre-Orders** screen, click the **Pre-Order Name** of your choice.

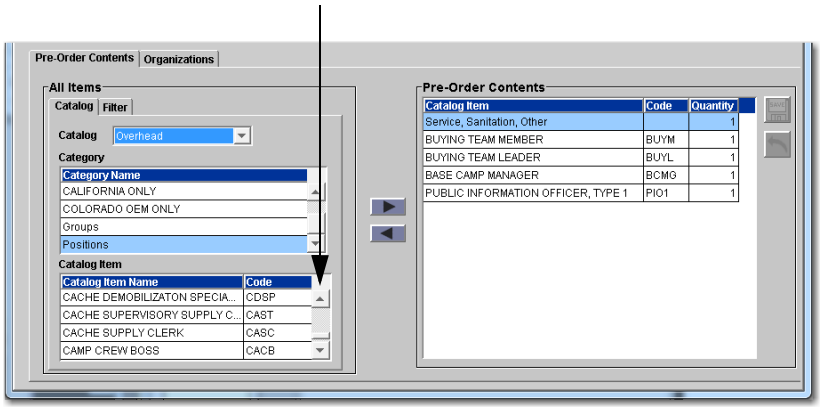
2 On the **Pre-Order Contents** tab under **All Items**, click the **Catalog** drop-down arrow, and then select the **Catalog** of your choice.

3 Under **Category**, click the **Category Name** of your choice

4 Under **Catalog Item**, scroll down and then click the **Catalog Item Name(s)** of your choice, and then click the **Add** button.

*Remember, to add more than one catalog item at a time, press and hold CTRL, click all **Catalog Item Names**, and then click the **Add** button.*

The following graphic shows the Catalog tab under All Items. The arrow points to the Catalog Item scroll bar.

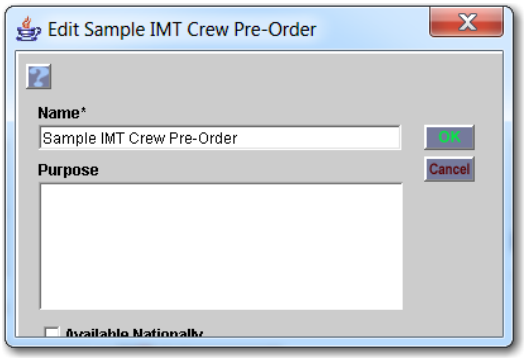


To Edit a Pre-Order

1 On the **Pre-Orders** screen, click the **Pre-Order Name** of your choice, and then click the **Edit** button.

2 On the **Edit [name of pre-order]** dialog box, modify the information as appropriate, and then click **OK**.

The following graphic shows the Edit [name of pre-order] dialog box.



To delete a pre-order

1 On the **Pre-Orders** screen, click the **Pre-Order Name** of your choice, and then click the **Delete** button.

2 On the **Confirm Deletion** dialog box, click **Yes** to confirm or click **No** to cancel.

To remove a resource item from the pre-order

1 On the **Pre-Orders** screen, click the **Pre-Order Name** of your choice.

2 On the **Pre-Order Contents** tab under **Pre-Order Contents**, click the **Catalog Item** of your choice, and then click the **Remove** button.

To change the quantity of a catalog item on a pre-order

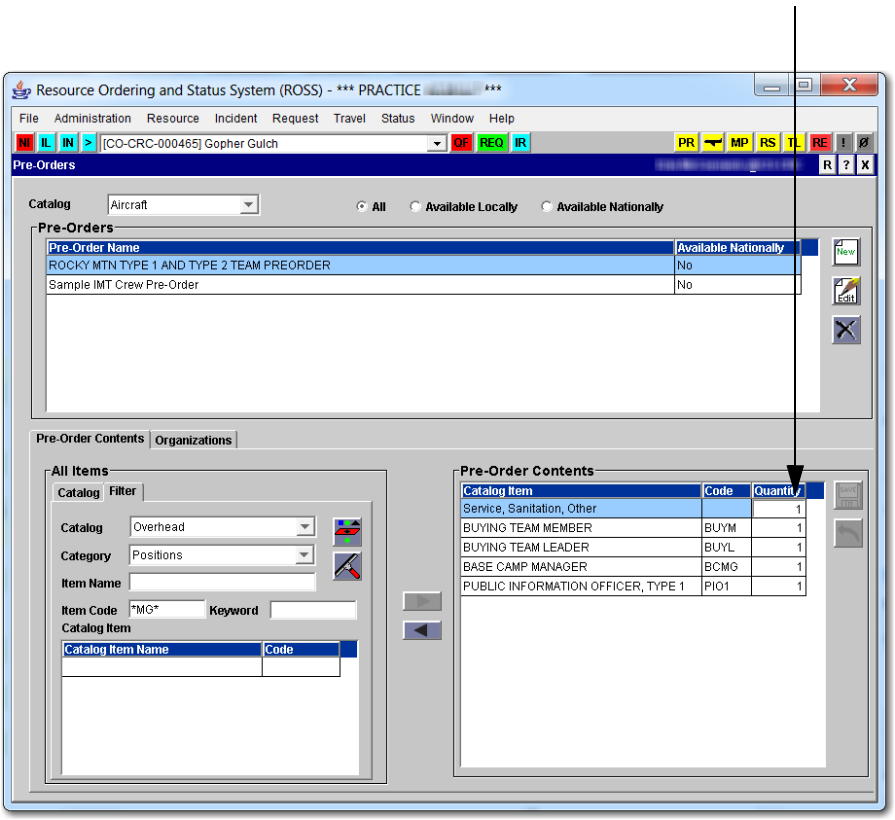
You may specify pre-order quantities up to 9999.

1 On the **Pre-Orders** screen, click the **Pre-Order Name** of your choice.

2 Under **Pre-Order Contents**, click the **Quantity** for the **Catalog Item** of your choice.

3 In the **Quantity** text box, type to replace the **Quantity**, and then click the **Save** button.

The following graphic shows the Pre-Order screen. The arrow points to the Quantity text box.

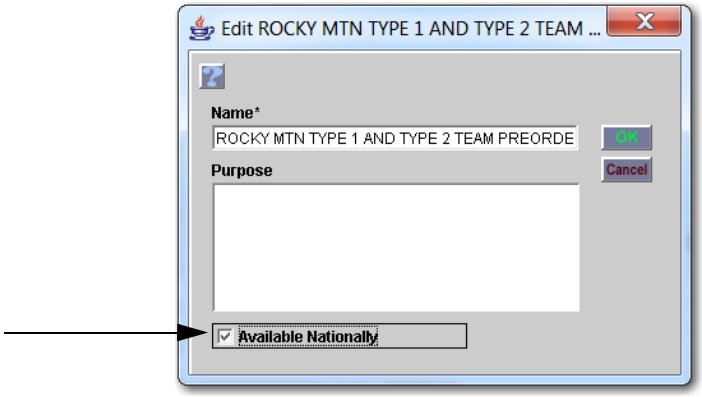


To change the availability of a pre-order

1 On the **Pre-Orders** screen, click the **Pre-Order Name** of your choice, and then click **Edit**.

2 On the **Edit [name of pre-order]** dialog box, click or click to clear the **Available Nationally** check box, and then click **OK**.

The following graphic shows the Edit [name of pre-order] dialog box. The arrow points to the Available Nationally check box.

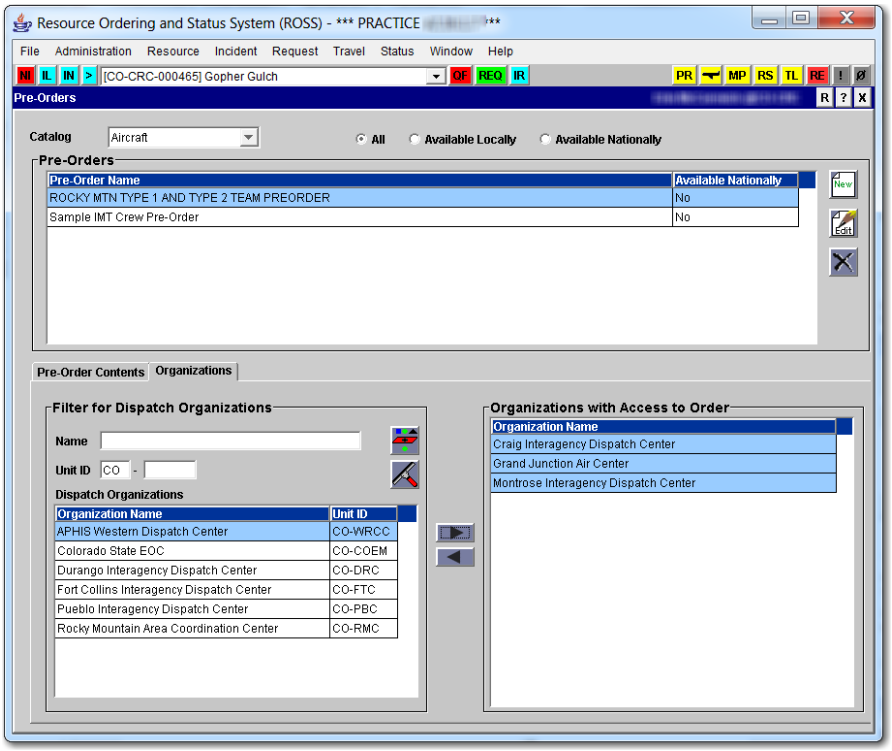


To allow access to an Available Locally pre-order by another organization

*Perform this task only if you want to designate access to an Available Locally pre-order to only a few dispatch offices. To allow access to the pre-order by all dispatch offices, click the **Available Nationally** check box.*

1. On the **Pre-Orders** screen, click the **Available Locally Pre-Order Name** of your choice, and then click the **Organizations** tab.
2. Under **Filter for Dispatch Organizations**, search for the **Name** and/or **Unit ID** of your choice.
3. Under **Dispatch Organizations**, click the **Organization Name(s)** of your choice, and then click the **Add** button.

The following graphic shows the Organization tab on the Pre-Orders screen.



To remove access to a pre-order by an organization

1. On the **Pre-Orders** screen, click the **Pre-Order Name** of your choice, and then click the **Organizations** tab.
2. Under **Organizations with Access to Order**, click the **Organization Name** of your choice, and then click the **Remove** button.

Exploring pre-orders in detail

A pre-order is a pre-established grouping of catalog items and their quantities needed for an incident. Typically, an incident team creates a pre-order so that those resources are ordered and arrive at the same time as the incident team. This allows the team to “hit the ground running.”

A pre-order is different from a configuration in the following ways:

- A Pre-Order does not have a “root” catalog item.
- A Pre-Order can also be created when a set group of resources are used frequently, such as for initial attack resources or aircraft resources. This is more efficient than creating individual requests for each resource.
- When ordered, separate requests are created for each catalog item. For configurations, subordinate requests are never created until the parent request is filled. Then the subordinate requests are visible, and filled, if needed.

The Pre-Orders screen displays two tabs:

- **Pre-Order Contents tab**. This tab allows you to add and/or remove catalog items from the pre-order.
- **Organizations tab**. This tab only applies to locally available pre-orders, and allows you to specify the organizations that have access to it.