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 cannot 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.