

ROSS TIPS

ROSS TIP: CNT-2004-1
Date: April 12, 2004
Subject: Useful Scenarios for Entering and Managing CWN Contracts

This ROSS Tip lays out the steps needed to address four scenarios that Users may encounter when dealing with **Call-When-Needed (CWN) Contracts** in ROSS. The scenarios are:

1. Two dispatch centers have **separate contracts** with the **same Vendor** for the **same Resource Item(s)**.
2. Two dispatch centers have **separate contracts** with the **same Vendor** for **unique Resource Item(s)**.
3. One dispatch center creates and maintains **one contract** and **other centers have authority to dispatch Resource Items** on this contract.
4. One dispatch center creates and maintains **one contract**. Some of the **Resource Items** on the Contract are **managed and dispatched by other centers**.

For all four scenarios we will begin by assuming that Dispatch Center #1 needs to associate a Vendor named 'Caterpillar Engines' to a CWN contract. **Dispatch Center #1** performs the following actions:

- On the **Organization screen** search and verify that this Vendor has not already been created in ROSS.
- Create the Vendor 'Caterpillar Engines'.
- On the **Resource Item screen** create and qualify the resources on their contract. On the Organization tab, pick Caterpillar Engines as the Resource Owner.
- On the **Contract screen**, create the CWN contract, pick the Vendor 'Caterpillar Engines' and add the Vendor's resources to the contract. To find and add resources click the **+** sign on the Resources tab, select the appropriate Catalog, leave the Resource Home Dispatch radio button set to their office and then click the Search button. Highlight the resulting resources on this contract and click the 'OK' button.

(Refer to the ROSS TIP titled "ROSS Contracts" for more detailed information on performing the above steps).

Scenario 1: Dispatch Center # 2 has a **separate contract** with Caterpillar Engines. Some (or all) of the resources on this contract are the **same resources** that were created by Dispatch Center #1 and added to their contract. *After coordinating with Dispatch Center #1*, **Dispatch Center #2** performs the following actions:

- **DO NOT** create a new Vendor. Remember, we already verified that a Vendor organization exists for Caterpillar Engines.
- On the **Resource Item screen**, create and qualify **only** the Caterpillar Engines **resources that are not on Dispatch Center #1's contract**. **DO NOT** create duplicate resource items at each office. On the Organization tab, pick 'Caterpillar Engines' as the Owner.
- On the **Contract screen**, create their CWN contract, pick 'Caterpillar Engines' as the Vendor and add only the resources that apply to their contract. **To find and add the resources that were created by Dispatch Center #1** click the **+** sign on the Resources tab, select the appropriate Catalog, click the 'Other

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Organizations' radio button, enter Dispatch Center #1's Unit ID and then click the Search button (fig. 1). Highlight only the resources that are on Dispatch Center #2's contract and click the 'OK' button.

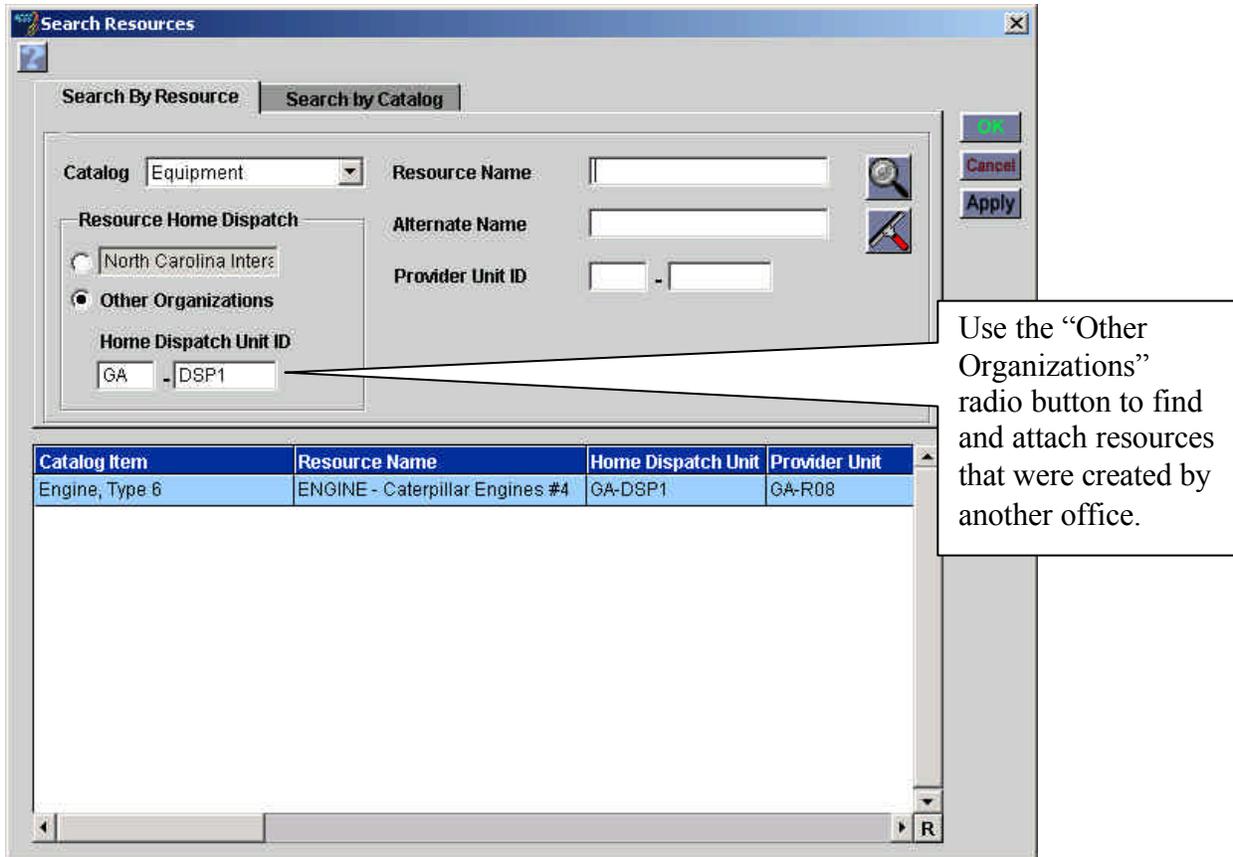


Figure. 1. Dispatch Center #2 searches for and adds resources created by Dispatch Center #1.

When Dispatch Center #2 needs to fill a request with a Caterpillar Engines resource, they will click the **All Resources radio button** on the CWN tab of the Pending Request screen. This will display all the qualified resources on Dispatch Center #2's contract regardless of which office created them (fig. 2).

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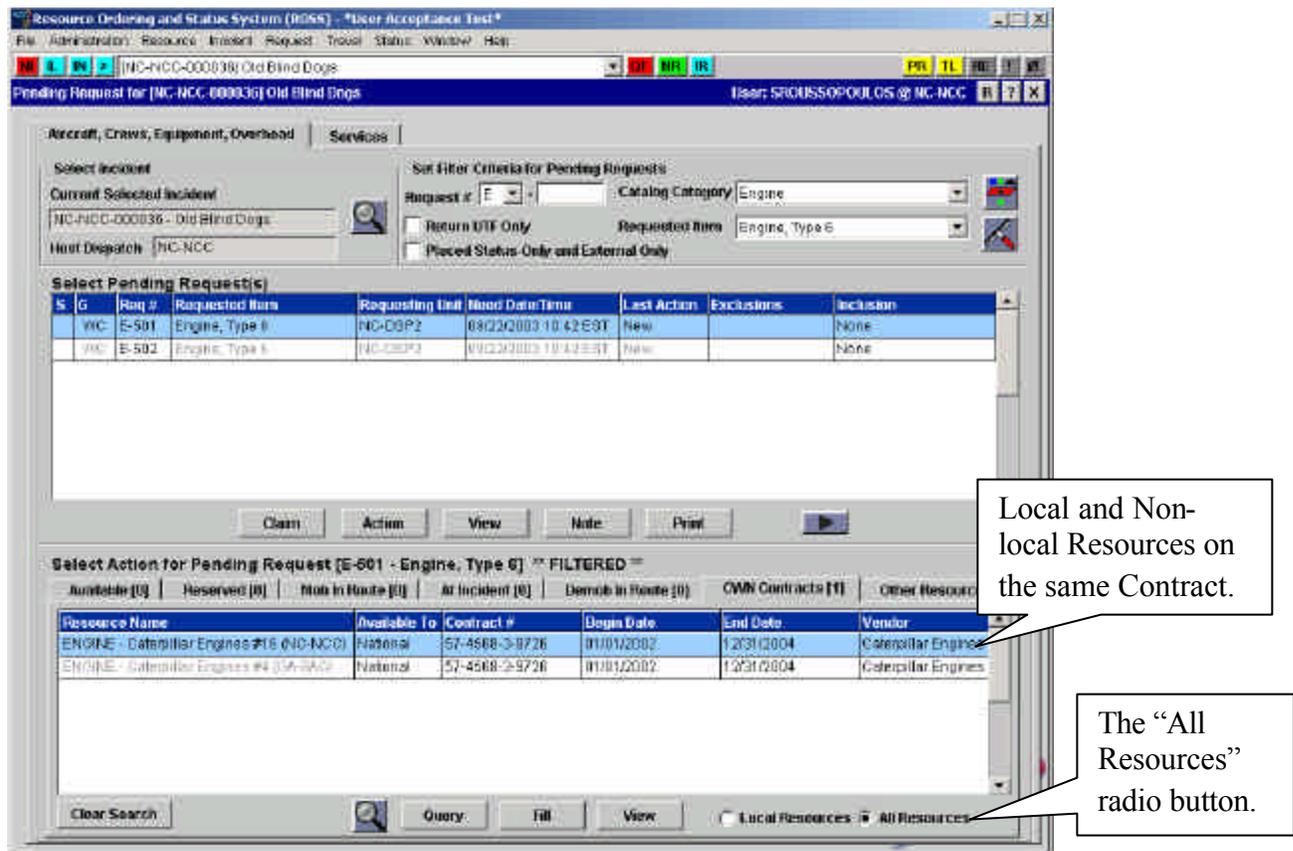


Figure 2. Use the All Resources radio button to include resources that were created by Dispatch Center #1.

Scenario 2: Dispatch Center # 2 has a **separate contract** with Caterpillar Engines. **None of the resources** on this contract **are the same** as those dispatched by Dispatch Center #1 (i.e., Center #1 did not create any of the resources that Center #2 dispatches). Dispatch Center #2 performs the following actions:

- On the **Resource Item screen**, create and qualify only the Caterpillar Engines resources on their contract. On the Organization tab, pick 'Caterpillar Engines' as the Owner.
- On the **Contract screen**, create their CWN contract and pick 'Caterpillar Engines' as the Vendor. Add only the Caterpillar Engines resources on their contract. To find and add resources click the + sign on the Resources tab, select the appropriate Catalog, leave the Resource Home Dispatch radio button set to their office and then click the Search button. Highlight the resulting resources on their contract and click the 'OK' button.

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When Dispatch Center #2 needs to fill requests for any of the Caterpillar Engines resources on their contract, they will click the '**Local Resources**' radio button on the CWN tab of their Pending Request screen (fig. 2).

Scenario 3: Dispatch Center #2 is authorized to use the CWN contract that Dispatch Center #1 created to dispatch and process payments for Caterpillar Engines resources. Dispatch Center #1 performs the following actions:

- On the **Contract screen**, add Dispatch Center #2 to the 'Organizations with Direct Access' area of the Contract screen for this contract (fig. 3).
- Notify Dispatch Center #2 that they now have access to the contract and its resources.

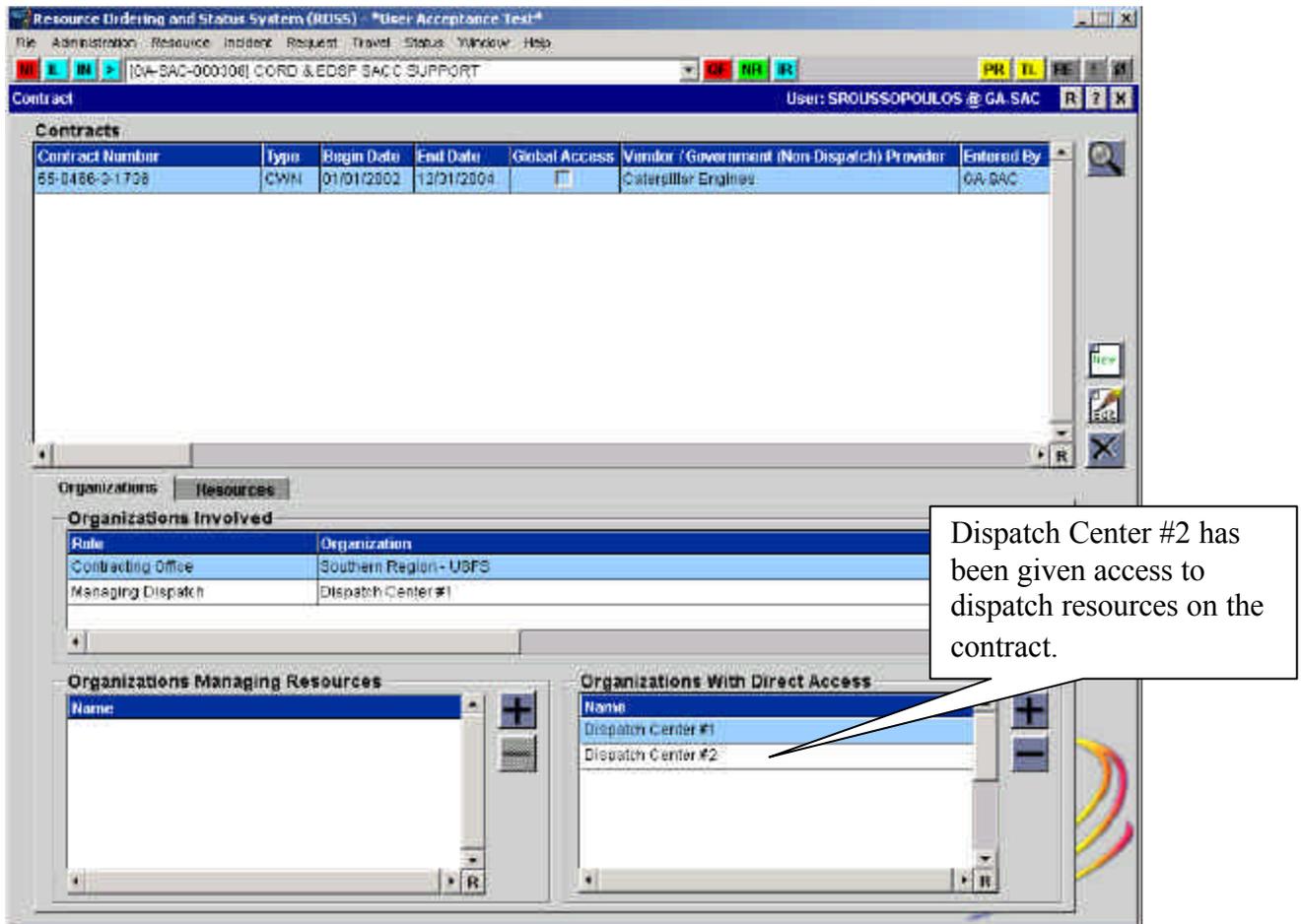


Figure 3. Dispatch Center #2 has been authorized to dispatch resources on a Contract that is managed by Dispatch Center #1.

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When **Dispatch Center #1** needs to fill a request with a Caterpillar Engines resource that is on the contract, they will **click the ‘Local Resources’ radio button** on the CWN tab of their Pending Request screen (fig. 2).

When **Dispatch Center #2** needs to fill requests with a Caterpillar Engines resource on the contract, they will **click the ‘All Resources’ radio button** on the CWN tab of their Pending Request screen (fig. 2)..

Scenario 4: Other centers manage and dispatch Resource Items that are **attached to Dispatch Center #1’s contract**. Dispatch Center #1 performs the following actions:

- On the **Contract screen**, add all of the centers that **manage** Caterpillar Engine resources on this contract to the **‘Organizations Managing Resources’** area of the screen¹ (fig. 4). Next, add all of the centers that have permission to dispatch Caterpillar Engine resources via this contract to the **‘Organizations with Direct Access’** area of the screen.

The other **Dispatch Centers that manage resources** on this contract must each perform the following actions:

- On the **Resource Item screen**, create and qualify only the resource items they manage. On the Organization tab, pick ‘Caterpillar Engines’ as the Owner.
- On the **Contract screen**, select the contract that Dispatch Center #1 created and add only the resource items managed by their center.

Each center may fill requests for the resources they manage by clicking on the ‘Local Resources’ radio button on the CWN tab of their Pending Request screen (fig. 2).

Centers that are authorized dispatch other resources on the contract may access them by clicking the ‘All Resources’ radio button on the CWN tab of their Pending Request screen (fig. 2).

IMPORTANT NOTE: Logically, a **resource cannot be both call-when-needed and exclusive use at the same time**. It follows that any resource having both Exclusive Use and CWN contracts must be carefully managed in ROSS. **The resource must be removed from all CWN contracts and attached to the Exclusive Use contract during its exclusive use period** (and vice versa). If this is not done, the resource will not be displayed correctly on the tabs of the Pending Request screen.

¹ ‘Organizations Managing Resources’ refers to dispatch centers that create and status one or more of the resources that are attached to the contract (i.e., the resource is on their Resource Item and Resource Status screens).

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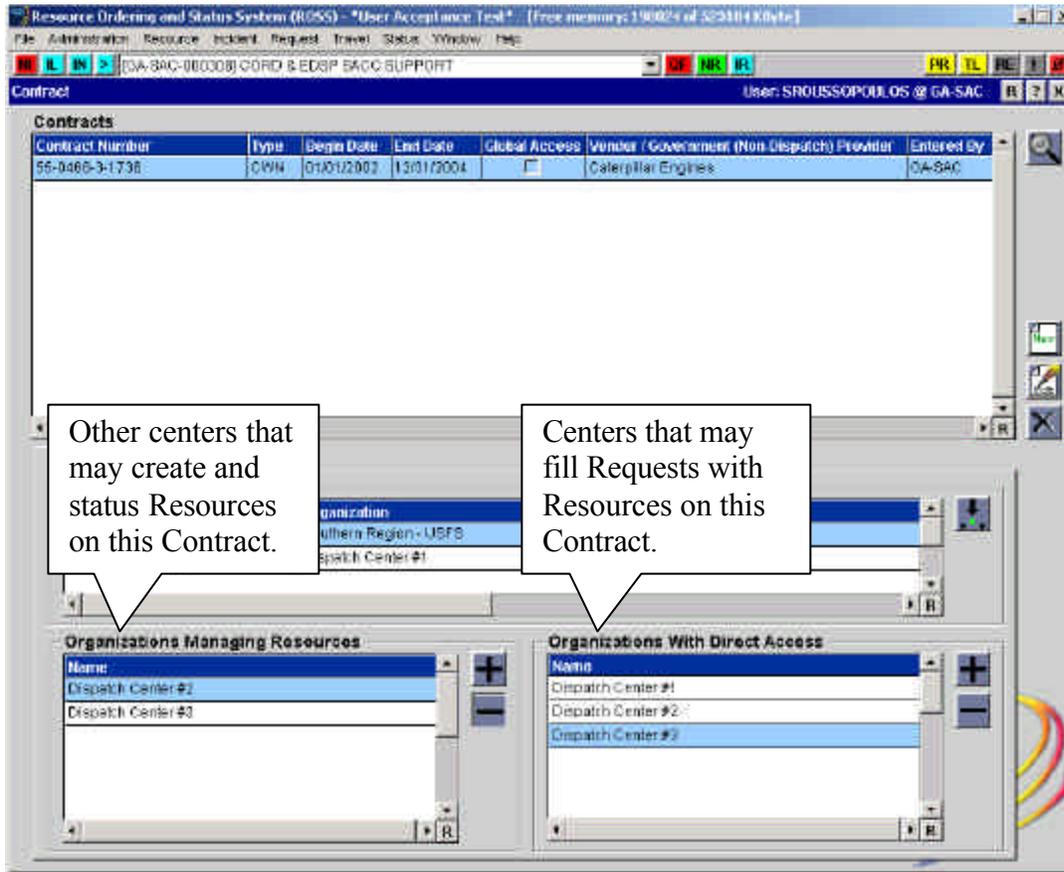


Figure 4. Designating offices that manage resources and/or have direct access to fill requests with resources on the contract.