



excellence in asset management



RAMM Contractor Best Practice

Release Version: 26th January 2012
RAMM Software Ltd
Auckland
NEW ZEALAND

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Document Release

To check that you are reading the most recent release of this document, please go to **RAMM Software Limited** web site (<http://www.ramm.co.nz>).

Please note that this document differs from most other **RAMM** user guides in that it will not be available in printed form. This is because it will be updated on a regular basis to take into account advances in recommended practice.

Instead, it will be available in XHTML and in PDF format from the **RAMM Software Limited** web site. It will also be available from time to time on CD.

| Author | Version | Release Date |
|-----------------|---|---------------------|
| Grant Mackenzie | Release version for distribution to users of RAMM Contractor . | 21st January 2009 |
| Grant Mackenzie | Updated version for change from CJN Technologies Ltd to RAMM Software Limited . No functional changes made. | 31st March 2011 |
| Grant Mackenzie | Changed title to RAMM Contractor Best Practice. CHM version. | 20th June, 2011 |
| Grant Mackenzie | Web Help version for web site | 26th January 2012 |

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Best Practice Introduction

Welcome to the *RAMM Contractor Best Practice* guide.

This guide contains recommendation for the most efficient and productive manner for Contractors and Network Owners to work together to manage their Road Network. It is divided into five sections.

- 1 An Introduction to Maintenance Programmes
- 2 Maintenance Programmes for Contractors
- 3 Maintenance Programmes for Network Owners
- 4 Handling Dayworks
- 5 Auditing the Contract.

There are also two appendices. These both contain flowcharts to help users remember how to perform simple daily activities. One is for **Pocket RAMM** and the second is for **RAMM Contractor**.

The **RAMM** suite of products including **RAMM Contractor** and **Pocket RAMM** has been designed as the fully integrated Roading Asset Management Maintenance solution. Contractors and the Network Owners should use best practice as outlined in this guide to assist them to achieve the highest level of control, certainty and efficiency.

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Best Practice Overview

This guide is divided into six sections including this introductory section. The sections are outlined below.

An Introduction to Maintenance Programmes

The Maintenance Programme is the Programme of works to maintain a Road Network within a particular period. This is sometimes referred to in the industry as the Forward Works Programme. [Forward Works Programme](#) has a specific, and different, meaning within **RAMM**. So the expression Maintenance Programme is used in this guide. The Network Owner normally engages a Contractor to identify all Network faults and Present a Maintenance Programme with an Estimated cost value.

See Introduction to Maintenance Programmes (on page 29).

Best Practice for Contractors and Maintenance Programmes

A Contractor needs certainty that they are going to have a defined Programme of maintenance work to perform each Programme period, a price agreed with the Network Owner prior to the commencement of the work and payment as per their contract with the Network Owner. Following the practices outlined in this *RAMM Contractor Best Practice* guide will assist both parties to achieve these goals.

See Contractors and Maintenance Programmes (on page 35).

Best Practice for Network Owners and Maintenance Programmes

A Network Owner needs certainty that they are going to have an agreed amount of Programmed work performed each Programme period, that the total of work done will be within budget and that it will be done at an agreed price as per their contract with the Contractor. Following the practices outlined in this *RAMM Contractor Best Practice* guide will assist both parties to achieve these goals.

See Network Owners and Maintenance Programmes (on page 101).

Best Practice for Dayworks

Dayworks are those tasks which a Network Owner has a Contractor perform, which are outside their agreed Maintenance Contract. These need to be handled outside the regular Maintenance Programme.

See Dayworks Best Practice (on page 135).

Best Practice for Auditing a Contract

Standard business practice is for the Network Owner or the Consultant to audit the work for which the Contractor has Claimed payment from the Network Owner. You can set up **RAMM Contractor** to assist in this process.

See Audit Best Practice (on page 149).

Contractors and Network Owners

The two parties to the Programmed Maintenance contract have very defined and separate roles.

Contractor

The Contractor identifies Faults and deficiencies in the Network. The Contractor then Estimates, schedules, completes and is paid for the maintenance work.

Network Owner

The Network Owner, or the Consultant, acting on behalf of the Network Owner, Approves, Holds or Rejects the Estimated Programme of works. They then audit the works once completed and pay for the maintenance work once done.

Introduction to RAMM

Road Assessment and Maintenance Management (**RAMM**) is software developed and supported by **RAMM Software Limited**. This software is used by Road Controlling Authorities (RCAs) to manage Road Inventory Assets and Condition for their Network.

RAMM is the complete package for Asset maintenance, valuation, assessment, Forward Work Planning as well as inventory-based Asset management. It also includes a range of report and analysis applications which complement the management functions.



excellence in asset management

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What is RAMM?

The **RAMM** (Road Assessment and Maintenance Management) software from **RAMM Software Limited** is a comprehensive suite of applications to maintain and manage Road Inventory and Condition data.



The name **RAMM** is used not only for a suite of Road Assessment and Maintenance Management applications but also for the central software application itself.

The RAMM Suite

The full **RAMM** suite includes **RAMM** (sometimes referred to as **RAMM** for Windows), **RAMM Contractor**, **Pocket RAMM**, **RAMM Manager**, **RAMM Network Manager**, **RAMM SQL**, **Hosting Administration**, **CAR Manager** and **RAMM GIS**.

When **RAMM** was introduced to the industry in the 1980s, it was a green screen application. Later a GUI (graphical user interface) was introduced. This is when it was sometimes called **RAMM** for Windows. As users came to expect more from **RAMM** other applications were added. **RAMM Manager**, **RAMM Network Manager** and **RAMM SQL** were added to facilitate Lookup, Staff Permissions, process, report and Network maintenance, database manipulation and data extraction. When Network Owners and Contractors needed a better system for contract management, **RAMM Contractor** and **Pocket RAMM** were introduced.

Recently the **CAR Manager** has been added to enable NZ Corridor Managers to manage access to their Network. **Hosting Administration** has been designed to give clients greater control over the users who access their Network data. It will be rolled out to our New Zealand clients in the near future. **RAMM GIS** enables easy viewing of **RAMM** data on a map without having to log in to **RAMM**.



Your RAMM Applications

The full **RAMM** suite includes the following applications. You can access each individual application only if you have the correct Staff Permissions.

RAMM (for Windows)

RAMM (for Windows) is the central application of the **RAMM** suite. You access your Inventory, Asset and Condition data for your Network from **RAMM**.

RAMM Manager

RAMM Manager is the module in the **RAMM** suite of products which you use to set up Lookups, to maintain Staff Permissions, to run processes such as Status Check, and to run reports.

RAMM Contractor

RAMM Contractor is the module of the **RAMM** suite of products which enables Contractors, Network Owners and Consultants to manage Road Asset Maintenance Contracts. In particular, it has been optimised to facilitate the Programming of Network maintenance and the Estimation and Claims process which is integral to Programmed Maintenance Contracts. It also includes the special features for the managing of Contracts for Signs, Street Lights and Traffic Signals maintenance.

Pocket RAMM

Pocket RAMM is the module of the **RAMM** suite of products which enables a user to run **RAMM** on a netbook, laptop, tablet or PDA, and to perform Contract, Inventory and Claim management while mobile, in the field. Virtually all of the everyday maintenance ability of **RAMM Contractor** is present in **Pocket RAMM**. Please note that the **Pocket RAMM** application has become so comprehensive that the use of PDAs with **Pocket RAMM** is no longer recommended. PDAs are no longer powerful enough to deliver a positive user experience.

RAMM SQL

RAMM SQL is the module of the **RAMM** suite of products which enables a power user to manipulate **RAMM** data using SQL (Structured Query Language). It is a very powerful tool and should be used only by advanced users who have a detailed knowledge of the **RAMM** database.

 **RAMM Network Manager**

RAMM Network Manager is the module in the **RAMM** suite of products which you use to manage the details of your Network and in particular, the Road centre lines. **RAMM Network Manager** is a powerful, flexible and comprehensive Road Network maintenance tool that helps you automate tasks and perform complex Network management actions. For example, you can reverse a Road with a single press of your mouse. When you apply this change **RAMM Network Manager** will update all relevant tables within the database. It also has a graphical display which displays current and historical views of the changes you are making.

**Hosting Administration**

The **Hosting Administration** is an online application which enables users to manage access to their Network. It enables Network Administrators to create logins for individual users and allows those individuals to maintain their own passwords. At the time of writing, Hosting Administration is available only to Western Australian LGAs who are clients of <arrb>.

**CAR Manager**

CAR Manager is the online application used by corridor managers to manage requests by utility operators, or their contractors, to access the Road corridor. Access to the corridor is required to make changes to electricity, gas, telecommunications, water, wastewater and postal infrastructure. At the time of writing, **CAR Manager** is available only to New Zealand RCAs who are clients of [RAMM Software Limited](#).



RAMM GIS is the **RAMM** Geospatial Information Service. Using it is a bit like flying over your network and viewing your **RAMM** data, but without ever leaving the office.



Your ability to view and access the complete suite of **RAMM** products will depend on your Staff Permissions. Best practice is to grant you permission to view and access only those applications which you need for your normal duties.

Your RAMM Database

All your Road Inventory and Condition information in **RAMM** is stored in a central database. Everything you do in **RAMM** is linked to it. All the actions you perform affect it.

How the Database Is Arranged

The information in the **RAMM** database is stored in tables. There are many of these, one for each aspect of the Road Network. Examples of **RAMM** tables are Surface Structure and Roughness. **RAMM** often combines information from different tables when you are working with it.

Each table holds its data in a combination of rows and columns. Each row in a table can also be called a record. It contains all the details for the particular aspect of the Road section - for example, the Start Displacement, Material, Construction Date and so on of a particular Road section. Each individual item of data is held in its own column.

These columns are related to the fields on **RAMM** screens. Information in a field on a **RAMM** screen resides in a table column. The column contains information about all the Roads, but pertaining only to one aspect of the Road - for example, just the Displacements for the various Roads and Road sections you are looking at.

| Road Asset: | Column (Field): | | | |
|--------------------------------|------------------------|---------------------------|------------------------|--------------------------|
| Surface Structure Table | Road Name | Start Displacement | Pavement Type | Construction Date |
| Row (Record): | Smith Street | 000m | Thin Surfaced Flexible | 17/03/2003 |
| | Jones Road | 100m | Concrete | 12/02/2000 |



Tip

You will see messages and warnings from time to time, some accompanied by detailed, database related information. It is always useful to either print or record this information somewhere and have it at hand when you call [RAMM Software Limited](#) for assistance. See Contact [RAMM Software Limited](#) (on page 26).

Your Other Software and RAMM

When you are working with [RAMM](#), you will use other software. The following list is not exhaustive. Also, you might not use some of the software listed.

Internet Browser

Your web or internet browser is the software application you use for accessing, presenting, and navigating information on the World Wide Web. You use it to access [RAMM](#) through the [RAMM Hosting Service](#). Common browsers are Internet Explorer, Firefox, Safari and Chrome. Best results for accessing [RAMM](#) through the [RAMM Hosting Service](#) have been achieved using Internet Explorer.

Citrix Client

The Citrix client is a third party, remote access application. It allows users to access [RAMM](#) remotely. It enables secure passing of data between a remote server and your local, or client pc or other device. Once the Citrix connection is established, you work with [RAMM](#) as if it were running on your local device.

Microsoft Excel and Others

You can export **RAMM** data in a format usable in Microsoft Excel, Access and other data manipulation and reporting software.

Windows Explorer

You use Windows Explorer (sometimes referred to as My Computer) to access files on your computer which you attach to records in **RAMM** on the Multimedia tab of the **RAMM** Detail screens. Similarly you can use the software to download and save **RAMM** multimedia files to your own hard drive.

dTIMS

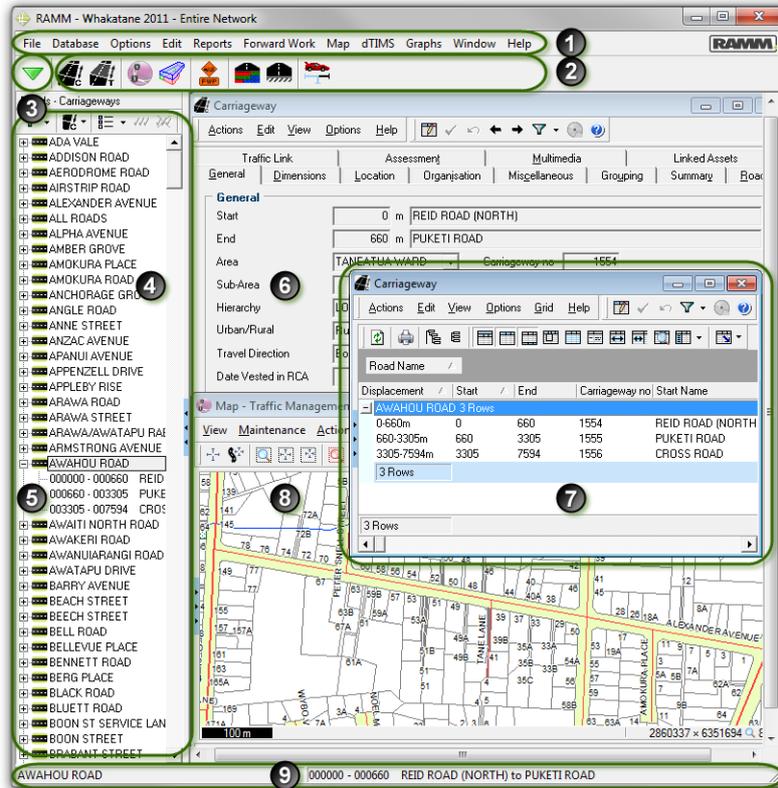
Deighton Total Infrastructure Management System (dTIMS) is a software tool used to model Pavement Deterioration. **RAMM** provides a method of extracting Treatment Length, Maintenance Cost and related data from the Road Network in a format that can be imported into dTIMS. You export information from **RAMM** for use in dTIMS, and then import the results of your analysis back into **RAMM**.

RAMM Web Service

A web service is software application supporting one software product to talk to another. You use the **RAMM** Web service to enable your CSRs (Customer Service Representatives) to use their customer service software to add a Job into **RAMM Contractor** for, say, a Street Light out, and to monitor the Job progress. Configuring access to the **RAMM Contractor** Web Service is the responsibility of the Network Owner.

The RAMM Main Screen

The **RAMM** main screen is your portal to your **RAMM** database. You should familiarise yourself with its main items.



| No | Item | Comments |
|----|---|--|
| 1 | Menu Bar | This contains the standard drop-down lists with which all Windows users will be familiar. |
| 2 | Tool bar | This is a repository for shortcuts to the screens you use most often. |
| 3 | Show toolbar menu (screen selection drop-down list) | You press this button for the drop-down list to access all the RAMM Inventory, Condition and other data screens. |
| 4 | Roads list panel | This panel lists all the Roads in your Network. You can Filter this list to include only the group of Roads you require. |
| 5 | Expanded tree | You press to expand the tree and reveal the Carrieway Sections for a Road. |

| | | |
|---|---------------|---|
| 6 | Detail screen | Detail screens display the details for one RAMM Inventory, Condition or other data record. You edit the item details at the Detail screen. |
| 7 | Grid screen | Grid screens display the details for one or more RAMM Inventory, Condition or other data records. You use Grid screens for reporting and other purposes. |
| 8 | Map | The Map in RAMM is a wonderful tool for visualising your Network and updating it. |
| 9 | Status bar | This is where you look to see useful information about what you are doing. |

RAMM Terminology

In **RAMM**, as with any software application, there are terms which have a meaning specific to the software. When you are working in **RAMM** you will encounter these terms. You should have an understanding of them before you do. Some of these terms are also used in the wider Road industry. The definitions below are specific to **RAMM**.

The following list is a minimum of the terms you need to understand before you start to work with **RAMM**. You can also look at the Glossary at the end of this guide for a more comprehensive list.

RCA

A Road Controlling Authority (RCA) is the organisation responsible for a particular Road Network. An example of an RCA could be the New Zealand Transport Agency (NZTA) or a TLA (Territorial Local Authority).

Network

A Network is a collection of Roads managed by a particular Road Controlling Authority (RCA). Each **RAMM** database usually contains all the information for one Network.

Road

For Local Authorities, a Road denotes a single named Road that is part of their Network. For State Highways, a Road is a segment of the State Highway. Roads may include associated Assets such as Pavement, Top Surface, and Shoulders. Assets such as Signs and Surface Water Channels are associated with a Road.

Carriageway

Roads in **RAMM** are divided into logical sections named Carriageways. These start and end at easily identifiable Locations such as Intersections and Bridges. You can define your Carriageway Sections to suit your own purposes. For instance you may define them to start and end when the number of Lanes in the Road changes or if the Road changes between Sealed and Unsealed sections. A Carriageway Section starts at one Displacement along the Road and ends at another Displacement. Carriageways define the lengths of Road against which other Assets can be referenced.

Displacement

Displacement is the distance along a Road measured from the start of the first Carriageway Section of the Road. It is stated in metres.

Location

Location refers to the collection of details used to position an Asset or Inventory item within a database. The most basic Location information is a combination of Road and Displacement. Location information can also include helpful notes such as nearby landmarks. Point Assets such as Signs have a Location field whose value is the Displacement of the Sign from the start of the Road.

Asset

An Asset is an item in a Network which has a value. It could be a physical component of a Road, such as its Surface. It could be something real such as a Bridge, a Footpath or a Street Light. Where no table exists in **RAMM** for one of your Asset Types, you set up a User Defined Table (UDT) to manage the Assets.

Nonasset

Nonassets are items for which screens exist in **RAMM** but which have no monetary value. They are generally something not physically present on the Road Network such as Roughness, Maintenance Cost and Crash. You can set up User Defined Tables (UDTs) to manage Nonassets which do not have their own screens in **RAMM**. Examples could be slips, hazards and certain Condition data.

Stock Asset

In **RAMM** the three Asset Types, Signs, Street Lights and Traffic Signals are referred to as Stock Asset Types. This is because, unlike the other Asset Types, when Signs, Street Lights and Traffic Signals Assets or components are replaced, a detailed record is kept of the replacements including the Replacement Reason. So you have an itemised list of the current and past Assets. You create Stock UDTs to manage those of your Assets (if any) which do not already exist in **RAMM** and for which you need to keep replacement records.

Network Inventory

Your Network Inventory is your **RAMM** database records including real items such as a Bridges and Footpaths as well as your Survey and other data such as Crashes and Bylaws. Your Condition data such as Roughness and your report data such as **RAMM** 3D do not form part of your Network Inventory.

Condition

The term Condition has two related meanings in **RAMM**. In **RAMM Assessment** the Condition of an Asset describes its fitness or readiness for use. Typical **RAMM** and NAMS Conditions are Excellent, Good, Average, Poor and Very Poor. Assessment Condition Weighting is used to determine Risk of Failure and the Consequences of Failure.

There are also Road Conditions which have their own **RAMM** screens. Roughness, High Speed Rutting and Skid Resistance are examples of **RAMM** items used to describe the Condition of your Roads.

You will be able to tell from the context in which it is used, which meaning of the term Condition is intended.

Assessment

An Assessment is the record of an inspection of an Asset. You use Assessments for a number of reasons including to record the Condition of an Asset or its associated Likelihood and Consequences of Failure (Risks). Rating and HSD are used to Assess Roads.

Rating

Rating is the process of recording the state of a Road by measuring the extent of the deterioration which has occurred. This includes factors such as the length of Cracking and Potholes. This is sometimes referred to as Condition Rating.

HSD

High Speed Data (HSD) is the collective name for particular properties and state of a Road as measured by specialised equipment mounted on a vehicle. The properties of the Road include its slope and curvature values. The state of the Road includes its Roughness and Skid Resistance values.

Treatment Length

A Treatment Length is a section of a Road with consistent performance and purpose. For example, it could have the same Top Surface material and Annual Average Daily Traffic (AADT) count along its length. A Treatment Length may have had similar Treatments applied along its length and is often different from its adjoining sections.

Treatment Lengths may coincide with Carriageway sections, but the same Carriageway section may have more than one Treatment Length. A Treatment Length may span more than one Carriageway section. Treatment Lengths will usually change over time, as conditions change.

Treatment Selection

A Treatment Selection is a recommended treatment for a Treatment Length to be carried out in the next twelve months. This recommendation can of course be No Treatment. Treatment Selections are generated in **RAMM** using the Treatment Selection Algorithm (TSA).

Log in to RAMM

You must log in to **RAMM** before you can use it.

You cannot log in to any of the **RAMM** applications unless you have a login name and a password. Once you have logged in you need appropriate Staff Permissions to carry out tasks related to your role.

Contact the Systems Administrator for the correct Staff Permissions to perform your normal tasks. See the Security chapter of the *Working with RAMM* guide.

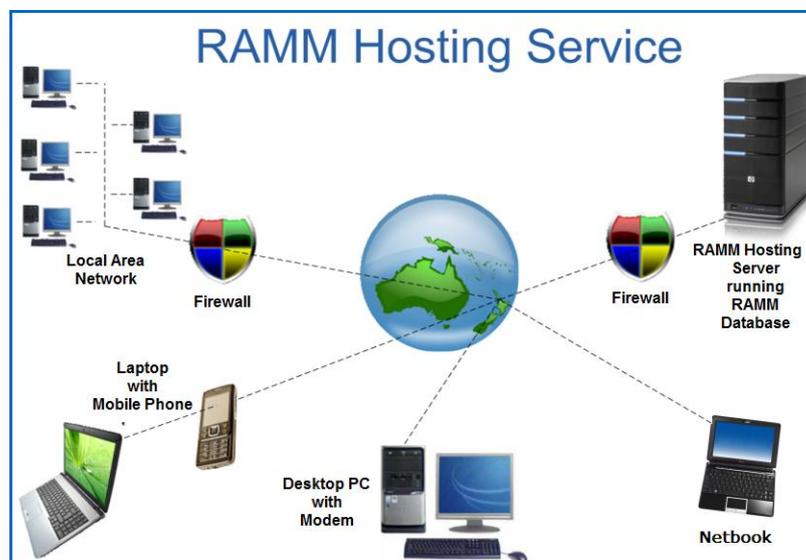
You log in to **RAMM** using the **RAMM** Hosting Service.

RAMM Hosting Service

The **RAMM Hosting Service** is a service run by **RAMM Software Limited**. It enables you to run **RAMM** across the Internet. It hosts your database and the software on a server at a centralised location. You use your standard internet browser to access the software and work with your data, so you do not need any specialised software. It is very secure.

You use the **RAMM Hosting Service** from anywhere with an internet connection.

The graphic below shows the the options to access **RAMM** using the **RAMM Hosting Service**.



Logging in to the RAMM Hosting Service

Introduction

You log in to the **RAMM Hosting Service** to access the **RAMM** applications.

Before you do this you need to have:

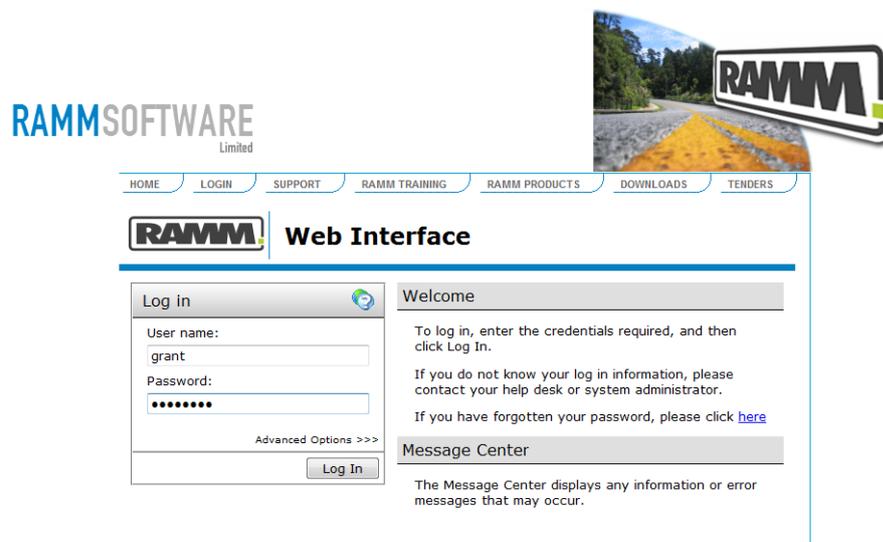
- been granted access with a username and password by **RAMM Software Limited**. To contact **RAMM Software Limited** for assistance, see Contact **RAMM Software Limited** (on page 26).

- Downloaded the MetaFrame Presentation Server Client for 32-bit Windows. You do this by clicking the link on the [RAMM Software Limited](#) website **Log in** page and following the instructions.
- opened your web browser such as Internet Explorer or Mozilla Firefox.

Menu Path

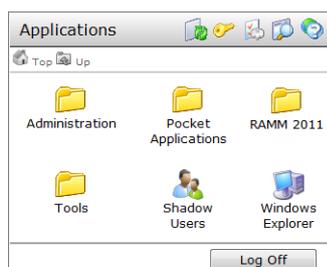
Follow the menu path [ramm.co.nz https://login.ramm.co.nz/](https://login.ramm.co.nz/) to open the **Log in** page.

► To Log in to the RAMM Hosting Service



To do this you follow these steps:

- 1 Type your username and password in the **User name:** and **Password:** fields.
- 2 Press **Log In**.
The **Applications** panel will open. What you see in the **Applications** panel will depend on your **Security Permissions**.



The icons you see in the **Applications** panel will depend on your **Staff Permissions**

- 3 Do you want to use **Pocket RAMM**?

| | |
|------------|---------------|
| Yes | go to step 4. |
| No | go to step 6. |

- 4 Press the Pocket Applications icon.
The **Pocket RAMM** applications will become available.
- 5 Go to step 7.
- 6 Press RAMM 2011.
The Applications panel will open. The software icons will be available.



Again, the icons you see in the Applications panel will depend on your **Staff Permissions**

- 7 Press the icon for the **RAMM** software you want to use.
The **RAMM** software application will open. If you have access to more than one database, a dialog will open so that you can choose the database which you require.



NOTE

If you use an older version of Mozilla Firefox as your internet browser, a **Warning** telling you that you do not have the MetaFrame Presentation Server Client for 32-bit Windows will display as in the **Log in** page screen shot above. Once you have downloaded the software you can ignore this warning.

RAMM Help Options

The time will come when you will want to know more about **RAMM** so that you can be both more proficient and efficient. Use the following options to upskill:

- use the Help from within the software. See Context-sensitive Help (on page 20).
- use internet-based Help. See **RAMM** Help on the Internet (on page 22).
- read the **RAMM** documentation. See **RAMM** Guides and Manuals (on page 23).
- discover the **RAMM** tables and columns. See **RAMM** Database Details (on page 25).
- talk to other **RAMM** users. See Help from Other Users (on page 24).
- seek professional help. See Contact **RAMM Software Limited** (on page 26).



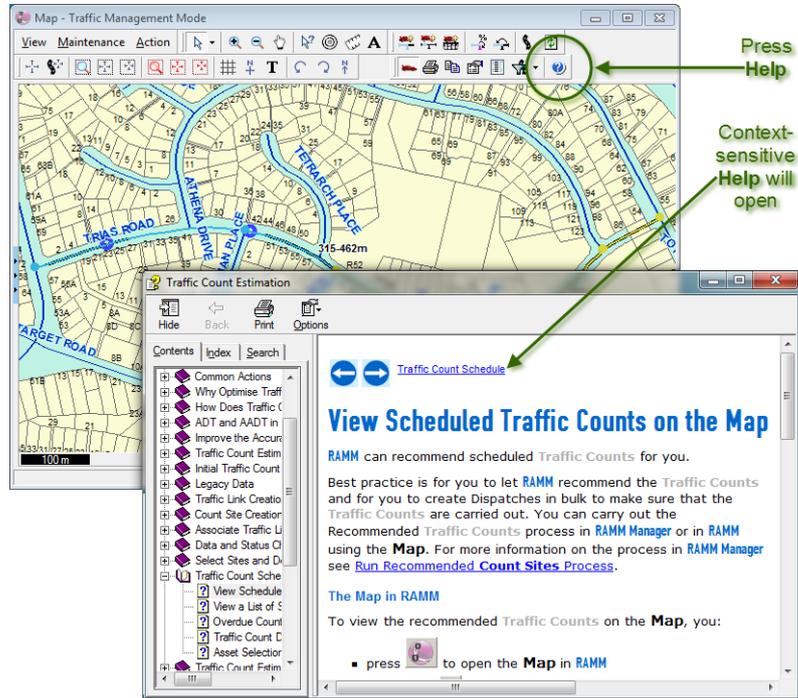
Context-sensitive Help

User assistance has been integrated into the **RAMM** applications.

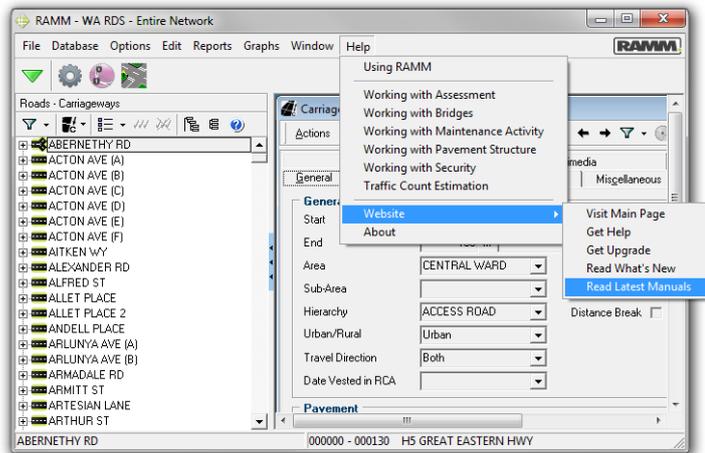
Most screens in **RAMM** have a Help  menu option. You press F1 on your keyboard or press Help  at the top of the screen to open the context-sensitive Help.

As you can see in the graphic below, when you press Help  at the top of the screen, one page in a .chm file will open. In this example information to enable you to view Scheduled Traffic Counts on the **Map** on **RAMM** is being offered.

If the information on the page does not solve your issues, you can navigate through the .chm file. Use the **Search** and **Index** to speedily locate the information you require.



If you still need further information you can follow the menu path Help > Website > Read Latest Manuals. This will take you to a list of the latest RAMM manuals and guides where you can search for answers.



RAMM Help on the Internet

The **RAMM** user guides and manuals are available from the [RAMM Software Limited](http://www.ramm.co.nz) web site (<http://www.ramm.co.nz>). They are generally available in both downloadable .pdf versions and in online Web Help versions.

Traffic Count Estimation Guide
 RAMM Traffic Count Estimation enables you to combine historical traffic information with intelligent Carriageway Section linking to produce a traffic counting and estimation programme which delivers the most Network coverage, the most accurate and up to date ADT Estimates for the minimum number of counts.

RAMM 2008 Best Practice Guide
 This guide is for Contractors and Network Owners who want to use RAMM Contractor and Pocket RAMM to manage the Roading Network in the most productive and efficient manner.

Best Practice for Assessment in Pocket RAMM
 You can now perform Assessments using from Pocket RAMM.
 Read this guide to see how.

Use this link to open a Web Help version of the manual

Web Help opens in your browser, is pretty and searchable, but prints only one page at a time

Use this link to download a .pdf file which is easily shared and printed

Web Help

The Web Help versions of the user guides and manuals are the primary versions you will want to use. They are available from the web site and so are available to you, so long as you have access to the internet.

The Web Help versions open in your internet browser and are very attractive. They are fully searchable. They have both a table of contents and an index for quick access to the information you want.

Their only disadvantages are that you can print only one page at a time and they are not available to you when the internet is not available.

PDFs

The .pdf versions of the user guides and manuals are useful mainly if you want to print complete documents or large portions of them.

Also, the .pdfs may be useful if you want to keep your own copy of the manual on your desktop or mobile device.

Google Search

If you type a question into the Google search, this will sometimes return the information you are after. This can be hit or miss.

RAMM Guides and Manuals

RAMM Software Limited offers useful guides and manuals to enable you to maximise the benefits to you of using RAMM.

Release Notes

Users who want to know what is in the latest version of RAMM should read:

- **What's New in RAMM 2011 (Web Help)**
This is a detailed description of the changes and improvements to the RAMM software suite in the 2011 release. In particular, it is the changes to Assets, Data, Finance, Patrols, Reports, Roads and Traffic Count Estimation, which are featured. The Web Help version of this document is fully detailed and fully searchable.

Basic Help

Users who are new to RAMM need to understand the RAMM basics to maximise their experience with the software. They should read the following RAMM primer as it includes very helpful introductory information:

- **Using RAMM**
This is a basic help guide introduction to RAMM. It covers the essentials, common tasks, procedures as well as Mapping and Decision Cube functions. There is a comprehensive explanation of the RAMM tool bar controls.

Advanced RAMM Functions

Users familiar with RAMM and ready for its more advanced functions should read:

- **Best Practice for Assessment in Pocket RAMM**
This guide shows how you can set up Assessments for Pocket RAMM and record your Assessments in the field. This guide is available online only.
- **Managing RAMM**
This advanced guide includes sections on Skid Resistance, Treatment Selection and Auditing Survey data. It has not been updated recently. This guide is available online only.
- **RAMM Assessment**
This guide is for those who manage and record Assessment Inspections of Network Assets, enter the results into RAMM and generate analyses of Condition and Risk.
- **RAMM Asset Valuation**
This advanced guide to the Asset Valuation process covers valuing a Road Network and calculating Replacement Costs.
- **RAMM Forward Work Programme**
This guide is for those who use RAMM Forward Work Programme (FWP) - also known as NOMAD. It is an advanced tool for forecasting and analysis.

- **Traffic Count Estimation**
This guide explains the set up and use of the **RAMM** Traffic Count Estimation System.
- **Working with RAMM**
This is an advanced help guide for power users of **RAMM**. Use this guide only if you have a good working knowledge of **RAMM**, its Assets, the database structure and key components such as Treatment Lengths. This guide covers: User Defined Assets, Surfaces, **RAMM SQL**, Bridges, Maintenance Activity, Pavement Structure, Pavement Strength and **RAMM** Security.

RAMM Contractor Guides

Those users who need to know how to use **RAMM Contractor** should read the following manuals:

- **RAMM Best Practice**
This guide gives step-by-step instructions on how to run a Programmed Maintenance Contract in **RAMM Contractor**. It is available as a .pdf or .xhtml file but not as a printed manual.
- **RAMM Contractor**
This guide is for those Road Maintenance Contractors and Network Owners who use **RAMM Contractor** software. It covers setting up Contracts, managing Dispatches, generating Claims for work done and reporting on Contract activities.

Printed Manuals

RAMM Software Limited is happy to provide you with printed manuals to which you can refer at your convenience.

There is a small charge for additional copies of the manuals. Printed manuals do not require access to a computer or the Internet and are ideal for browsing, reference or learning about something in depth.

There are a number of guides which are available to **RAMM** users. The following list includes those most used and gives a brief overview of what they cover. For a full list of available guides, see the **RAMM Software Limited** web site Documentation page (<http://www.cjntech.co.nz/index.php?section=55>).

Help from Other Users

Other users can be a mine of information.

If there are other users in your organisation, you should approach them if they perform the same tasks as you do or if they have been using **RAMM** for longer than you.

They probably know shortcuts, tips and tricks which they can teach you. Don't reinvent the wheel. Talk to someone who knows more than you.

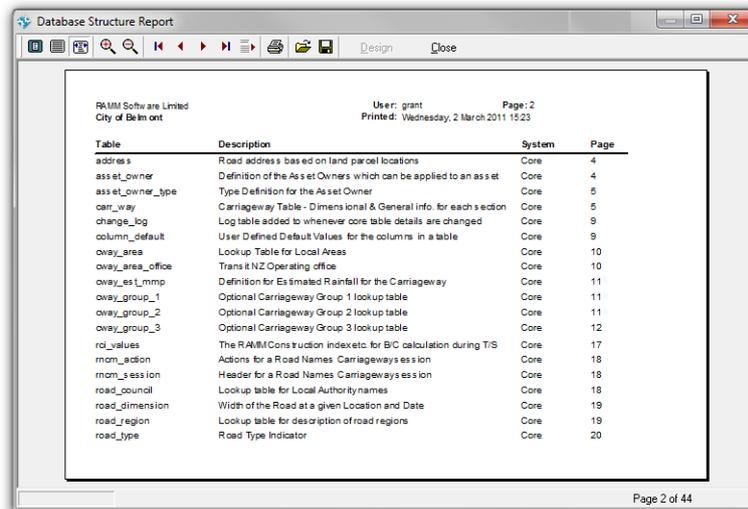


RAMM Database Details

When you begin to carry out more complex tasks, you will need to know where specific details are stored in the **RAMM** database. These details are available in the Database Structure report.

The Database Structure report is a listing of all tables and columns in the **RAMM** database. It is available from the **RAMM Manager** main menu. You follow the menu path Reports > Database Structure.

You then choose the tables you wish to view and then press Preview or Print to view or print the report.



RAMM Software Limited
City of Belmont

User: grant
Printed: Wednesday, 2 March 2011 15:23

Page: 2

| Table | Description | System | Page |
|------------------|---|--------|------|
| addresses | Road addresses based on land parcel locations | Core | 4 |
| asset_owner | Definition of the Asset Owners which can be applied to an asset | Core | 4 |
| asset_owner_type | Type Definition for the Asset Owner | Core | 5 |
| carrieway | Carrieway Table - Dimensional & General info. for each section | Core | 5 |
| change_log | Log table added to whenever core table details are changed | Core | 9 |
| column_default | User Defined Default Values for the columns in a table | Core | 9 |
| oway_area | Lookup Table for Local Areas | Core | 10 |
| oway_area_office | Transit NZ Operating office | Core | 10 |
| oway_est_mmp | Definition for Estimated Rainfall for the Carrieway | Core | 11 |
| oway_group_1 | Optional Carrieway Group 1 lookup table | Core | 11 |
| oway_group_2 | Optional Carrieway Group 2 lookup table | Core | 11 |
| oway_group_3 | Optional Carrieway Group 3 lookup table | Core | 12 |
| rdi_values | The RAMM Construction Index etc. for B/C calculation during T/S | Core | 17 |
| rdm_action | Actions for a Road Names Carrieway session | Core | 18 |
| rdm_session | Header for a Road Names Carrieway session | Core | 18 |
| road_council | Lookup table for Local Authority names | Core | 18 |
| road_dimension | Width of the Road at a given Location and Date | Core | 19 |
| road_region | Lookup table for description of road regions | Core | 19 |
| road_type | Road Type Indicator | Core | 20 |

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Contact RAMM Software Limited

Internet

This is the link to open the [RAMM Software Limited](http://www.ramm.co.nz) web site (<http://www.ramm.co.nz>).

Email

This is the link to send an email to [RAMM Support](mailto:support@ramm.co.nz) (<mailto:support@ramm.co.nz>).

This is the link to send an email to [RAMM Documentation](mailto:documentation@ramm.co.nz) (<mailto:documentation@ramm.co.nz>).

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Albany
Auckland
New Zealand

Comments and Suggestions

If you have any feedback about this document or about the software itself, please contact [RAMM Software Limited](#) at whichever address above is convenient to you. Your observations and suggestions are welcome. Your feedback is an important element in improving and updating the [RAMM](#) experience.



Introduction to Maintenance Programmes

The Maintenance Programme is the Programme of works to maintain a Road Network within a particular period. This is sometimes referred to in the industry as the Forward Works Programme. [Forward Works Programme](#) has a specific, and different, meaning within **RAMM**. So the expression Maintenance Programme is used in this guide. The Network Owner normally engages a Contractor to identify all Network faults and Present a Maintenance Programme with an Estimated cost value.

This section deals with a Maintenance Programme of works, rather than the Dayworks outside the agreed Maintenance Programme. For information on Dayworks see Dayworks Best Practice (on page 135).

Recommended Process

There are a number of systems which a Network Owner and a Contractor could set up and use **RAMM**, **RAMM Contractor** and **Pocket RAMM** to manage their Road Maintenance Contract. What follows in this section is the recommended process.

In This Chapter

| | |
|--|----|
| Combined Maintenance Programme Best Practice Process | 29 |
| Accept Hold and Reject..... | 32 |

Combined Maintenance Programme Best Practice Process

Network Owners and Contractors have their own requirements and responsibilities. These are outlined in their own sections below. See:

- Contractors and Maintenance Programmes (on page 35)

- Network Owners and Maintenance Programmes (on page 101).

However, so that both parties can see the entire process and the responsibilities of the other party, the two processes have been combined below.

Programme Period

For the purposes of this *RAMM Contractor Best Practice* guide, it has been assumed that the Network Owner and the Contractor have agreed that their Maintenance Programme will be monthly, starting on the first day of the month and ending on the last day of the month. Your situation may vary by starting and finishing on the 20th of the month or using a different period. In this situation, you should change the dates to suit your business practices.

It is also assumed that the Network Owner has a fixed budget for annual maintenance to their Road Network and that there is an agreement or contract to pay up to this amount to a Roading Maintenance Contractor.

Combined Maintenance Programme Process

Network Owners and Contractors will not all have exactly the same systems, but, in essence, the process is likely to be similar to the following:

- 1 The Contractor patrols the Road Network to locate faults. See *Cyclic Patrols* (on page 150).
- 2 The Contractor creates Dispatches for repair of the faults. These are known as **Jobs in Pocket RAMM**. They have an Estimate of the likely cost to repair the faults and are placed into the Maintenance Pool. See *Dispatches and Jobs* (on page 39).
- 3 The Contractor, on an agreed date during the Programme period, checks the Dispatches in the Maintenance Pool, selects those suitable for completion in the following Programme period and assigns them to that Programme period. See *Reviewing the Programme Estimates* (on page 54).
- 4 The Contractor, during the Programme period, then uses the Estimate Review Tool to present a group of Dispatches, which are Estimates only, to the Network Owner as a proposed Programme of works for the following Programme period. See *Presenting Estimates* (on page 57).
- 5 The Network Owner, on an agreed date during the Programme period, uses the Estimate Review Tool to check the proposed Programme of works from the Contractor. Estimate lines and totals are checked to be sure that they are within budget and within the agreed contract parameters. See *Reviewing Estimate line Totals* (on page 107).
- 6 The Network Owner, on an agreed date during the Programme period, uses the Estimate Review Tool to Accept, Hold or Reject the Estimate lines for the following month sent through by the Contractor. See *Reviewing Individual Estimate Lines* (on page 111).

- 7 The Contractor then uses the Estimate Review Tool at regular intervals prior to the end of the Programme period, to locate Estimate lines which the Network Owner has placed on Hold or Rejected. The Contractor addresses the problems with the **Held** Estimate lines and Presents them again before the start of the Programme period. See Addressing **Held** Estimate lines (on page 59).
- 8 The Network Owner uses the Estimate Review Tool at regular intervals during the Programme period, to Accept, Hold or Reject the revised Estimates sent through by the Contractor. See Reviewing **Held** Estimate Lines when Presented Again (on page 115).
- 9 The Contractor assigns the Accepted and Programmed Dispatches to the staff. This can be commenced on or before the start of the Programme period continued throughout the Programme period as appropriate. See Assigning Dispatches in Bulk (on page 66).
- 10 The Contractor and staff carry out the Jobs throughout the Programme period. When a Job is done they change the status of the Dispatch to **Complete**. The Estimate lines automatically copy over to become Claim lines. See Completing a Job with Estimate Lines (on page 69).
- 11 The Contractor, at regular intervals throughout the Programme period, opens the Claim Review Tool and reviews and Presents the Claim lines. See Reviewing and Presenting Claims (on page 74).
- 12 The Network Owner, at regular intervals throughout the Programme period, uses the Claim Review Tool to Accept, Hold or Reject the **Presented** Claim lines. All Claim lines which have not changed from **Accepted** Estimates can be Accepted without review. All other Claim lines will require review. See Reviewing Claim Lines (on page 122).
- 13 The Contractor then uses the Claim Review Tool to locate and review Claim lines which the Network Owner has placed on Hold or Rejected. The Contractor addresses the problem with the Claim lines and Presents them again. See Addressing **Held** Claims (on page 78).
- 14 The Network Owner uses the Claim Review Tool throughout the month, to review the revised and **Presented** Claim lines and to Accept, Hold or Reject them. See Reviewing **Held** Claim Lines when Presented Again (on page 126).
- 15 The Contractor Prepares the Claim Header at the end of the Claim period. This closes off the Claim Header and enables the Contractor to do a final review of the Claim lines for the Claim period. See Preparing the Claim (on page 85).
- 16 The Contractor defines as Disputed, the Claim lines which were not Accepted. These are dealt with through the agreed disputes procedures. See Addressing Disputed Claim Lines (on page 87).
- 17 The Contractor Presents the Claim Header to the Network Owner for payment. See Presenting the Claim (on page 91).
- 18 The Network Owner uses the Claim Review Tool to review the Claim lines in the **Presented** Claim Header and to Accept, Hold or Reject them. See Reviewing the **Presented** Claim Header (on page 130).
- 19 The Network Owner sends the **Accepted** Claim Header to the accounts department who pay the Contractor.
- 20 The Contractor closes the Claim. See Completing the Claim (on page 95).
- 21 The Contractor transfers the Maintenance Cost data into **RAMM**. See Sending Claim Information to **RAMM** Maintenance Costs (on page 98).

Accept Hold and Reject

When a Contractor has Presented Maintenance Programme Estimate lines or Claim lines to the Network Owner, they can Accept, Hold or Reject them.

Accept

By Accepting an Estimate line, the Network Owner has agreed that:

- the work should be done
- it should be done in a particular Programme period
- it should be done within the Estimated price.

By Accepting a Claim line the Network Owner has agreed that:

- the work has been carried out
- it has been performed in the Claim period
- subject to physical audit and quality assurance checking, it will be paid.

Hold

When an Estimate line has been placed on Hold there should be an explanatory note from the Network Owner who may have disputed:

- the price of the Estimate line
- the Programme period of the Estimate line
- the need for the Estimate line.

When a Claim line has been placed on Hold there should be an explanatory note from the Network Owner who may have disputed:

- the extra cost of the Claim lines
- the Claim period of the Job
- the lack of an Accepted Estimate line
- additional or unjustified Claim lines.

Reject

If the Network Owner does Reject an Estimate or Claim line it means that they do not want the work done and will never pay for it to be done.

Rejected Claim and Estimate lines are not usually deleted. The records are usually kept for information.

The Network Owner may want to consider very carefully whether they should Reject Estimate and Claim lines. It may be more sensible to place the lines on indefinite Hold.

Contractors and Maintenance Programmes

A Contractor needs certainty that they are going to have a defined Programme of maintenance work to perform each Programme period, a price agreed with the Network Owner prior to the commencement of the work and payment as per their contract with the Network Owner. Following the practices outlined in this *RAMM Contractor Best Practice* guide will assist both parties to achieve these goals.



This section outlines recommended process, overview information and procedures for a Contractor and staff. If you are a Network Owner, you should skip this section and go to your section below. See *Network Owners and Maintenance Programmes* (on page 101).

In This Chapter

| | |
|---|----|
| Maintenance Programme Process for Contractors | 35 |
| Programmed Maintenance..... | 37 |
| Estimate Presentation Best Practice | 49 |
| Claim Presentation Best Practice | 63 |

Maintenance Programme Process for Contractors

It is recommended that the Contractor take the following steps each Programme period to ensure a smooth working relationship with the Network Owner.

- 1 The Contractor patrols the Road Network to locate faults. See *Cyclic Patrols* (on page 150).

- 2 The Contractor creates Dispatches for repair of the faults. These are known as Jobs in **Pocket RAMM**. They have an Estimate of the likely cost to repair the faults and are placed into the Maintenance Pool. See Dispatches and Jobs (on page 39).
- 3 The Contractor, on an agreed date during the Programme period, checks the Dispatches in the Maintenance Pool, selects those suitable for completion in the following Programme period and assigns them to that Programme period. See Reviewing the Programme Estimates (on page 54).
- 4 The Contractor, during the Programme period, then uses the Estimate Review Tool to present a group of Dispatches, which are Estimates only, to the Network Owner as a proposed Programme of works for the following Programme period. See Presenting Estimates (on page 57).
- 5 The Contractor then uses the Estimate Review Tool at regular intervals prior to the end of the Programme period, to locate Estimate lines which the Network Owner has placed on Hold or Rejected. The Contractor addresses the problems with the Held Estimate lines and Presents them again before the start of the Programme period. See Addressing Held Estimate lines (on page 59).
- 6 The Contractor assigns the Accepted and Programmed Dispatches to the staff. This can be commenced on or before the start of the Programme period continued throughout the Programme period as appropriate. See Assigning Dispatches in Bulk (on page 66).
- 7 The Contractor and staff carry out the Jobs throughout the Programme period. When a Job is done they change the status of the Dispatch to **Complete**. The Estimate lines automatically copy over to become Claim lines. See Completing a Job with Estimate Lines (on page 69).
- 8 The Contractor, at regular intervals throughout the Programme period, opens the Claim Review Tool and reviews and Presents the Claim lines. See Reviewing and Presenting Claims (on page 74).
- 9 The Contractor then uses the Claim Review Tool to locate and review Claim lines which the Network Owner has placed on Hold or Rejected. The Contractor addresses the problem with the Claim lines and Presents them again. See Addressing Held Claims (on page 78).
- 10 The Contractor Prepares the Claim Header at the end of the Claim period. This closes off the Claim Header and enables the Contractor to do a final review of the Claim lines for the Claim period. See Preparing the Claim (on page 85).
- 11 The Contractor defines as Disputed, the Claim lines which were not Accepted. These are dealt with through the agreed disputes procedures. See Addressing Disputed Claim Lines (on page 87).
- 12 The Contractor Presents the Claim Header to the Network Owner for payment. See Presenting the Claim (on page 91).
- 13 The Contractor closes the Claim. See Completing the Claim (on page 95).
- 14 The Contractor transfers the Maintenance Cost data into **RAMM**. See Sending Claim Information to **RAMM** Maintenance Costs (on page 98).

Programmed Maintenance

Once you have set up your Contract in **RAMM Contractor** you need to set up your Maintenance Programme unless your Contract is for Traffic Signals maintenance or a similar situation where the same set of maintenance activities are regularly performed.

Items to be Set Up

The particular items which you must have set up to be able to follow recommended practice are:

- a catch-all Programme named **Maintenance Pool** to which all new Maintenance Programme Dispatches are placed at the time of creation
- a series of Programmes named after Programme period of the Maintenance Contract duration such as **Aug-08**, **Sept-08** and **Oct-08**.

On or before a regular date such as the 20th of each month, a senior Contractor staff member will reassign Dispatches from the **Maintenance Pool** into the appropriate Programme period. When the Dispatches are Completed they will become associated with the open Claim Header for the Claim period in which the Job is completed.

Maintenance Pool

You should set up a catch-all Programme named **Maintenance Pool** or similar. When Dispatches are created they can then be associated with the **Maintenance Pool** at the **Programming** section of the **General** tab on the **Dispatch** maintenance screen if they are going to be part of a Maintenance Programme under the Contract.



| Programming | |
|---------------|------------------|
| Programme | Maintenance Pool |
| Programme Cat | |

This enables you to readily distinguish between those Dispatches, such as Dayworks, which are not going to be Programmed ever and those Dispatches which are going to be part of the Maintenance Programme, but have yet to be Programmed.

Adding Programmes

Introduction

When you add a Dispatch, you have the option of associating it with a Programme. If the Dispatch is not for Dayworks, then recommended practice is to add it to a pool of Dispatches for reassignment later. This pool could be named **Maintenance Pool**.

The Dispatches are then already grouped when, on or before a regular date such as the 20th of each month, a senior staff member of the Contractor reviews the pooled Dispatches to decide into which Programme period they will be placed.

Before you do this you need to have:

- a copy of the contract to which to refer if necessary.

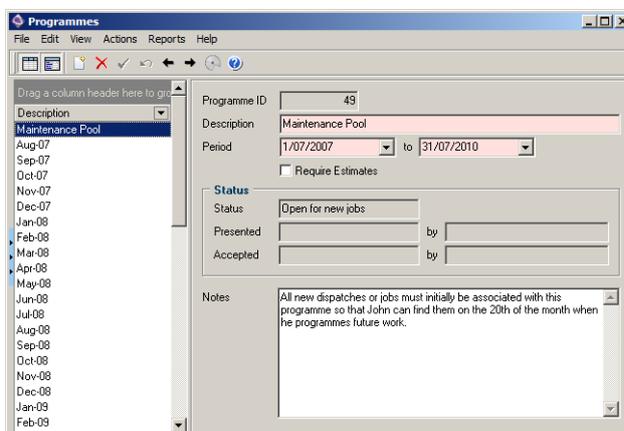
Menu Path

Follow the menu path **Actions > Programmes** to open the **Programmes** maintenance screen.

► To Add Programmes

To do this you follow these steps:

- 1 Press  or CTRL+N.
The fields in the right hand panel will become available.



- 2 Type **Maintenance Pool** in the Description field.

- 3 Select two dates from the **Period** and to drop-down calendars. For the **Maintenance Pool**, the first date should be the data entry date or earlier. The second date should be the end date of the contract or later. For the actual Programme periods, the dates should reflect the contract provisions.
- 4 Type in the **Notes** field, any notes that are useful for your business purposes. Notes which are added at the time of creation or editing can be very useful at a later date. Notes can help if you have forgotten why you did something or if another user needs to understand your reasoning and purpose.
- 5 Press .
The Programme is saved.
- 6 Repeat the procedure to define a Programme for each Programme period of the contract.

Dispatches and Jobs

A Dispatch is a defined activity generated from within **RAMM Contractor** so that Contractor field crew can repair a Network Fault. In **Pocket RAMM** it is referred to as a Job.

A Job is a defined activity generated from within **Pocket RAMM** so that Contractor field crew can repair a Network Fault. In **RAMM Contractor** it is referred to as a Dispatch.

RAMM Contractor or Pocket RAMM?

If you use **Pocket RAMM** then it is likely that most of maintenance activities required for Network Maintenance will be added as Jobs from within **Pocket RAMM**. See Adding a Maintenance Programme Job (on page 45).

If you do not use **Pocket RAMM**, then you will have to add Dispatches in **RAMM Contractor** to record the maintenance activities required for Network Maintenance. See Adding a Maintenance Programme Dispatch (on page 40).

Assign to Maintenance Pool

As the Contractor staff perform their Cyclic Patrols, they identify Faults and create Jobs in **Pocket RAMM** or Dispatches in **RAMM Contractor**. Recommended practice is that they Estimate the cost of the work at the time of data entry and associate the Dispatches and Jobs with the Maintenance Pool.

Adding a Maintenance Programme Dispatch

Introduction

A Dispatch is a defined activity generated from within **RAMM Contractor** so that Contractor field crew can repair a Network Fault. In **Pocket RAMM** it is referred to as a Job.

When you add a Dispatch which is to be part of a Maintenance Programme, it is recommended that you add it to the Maintenance Pool. Then, on the 20th of each month, or another date near the end of the Programme period, when the senior staff member of the Contractor reviews the new Dispatches to decide into which Period they will be Programmed, it is very convenient and efficient because the Dispatches are already grouped.

The two most important things to remember when entering a Dispatch are to:

- identify the Asset
- enter precise and helpful Location and dimension details for the maintenance crew.

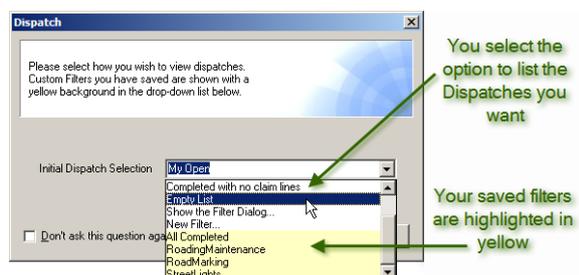
Before you do this you need to have:

- added the Maintenance Pool. You do this at the **Programme** screen. See Adding Programmes (on page 38).

Menu Path

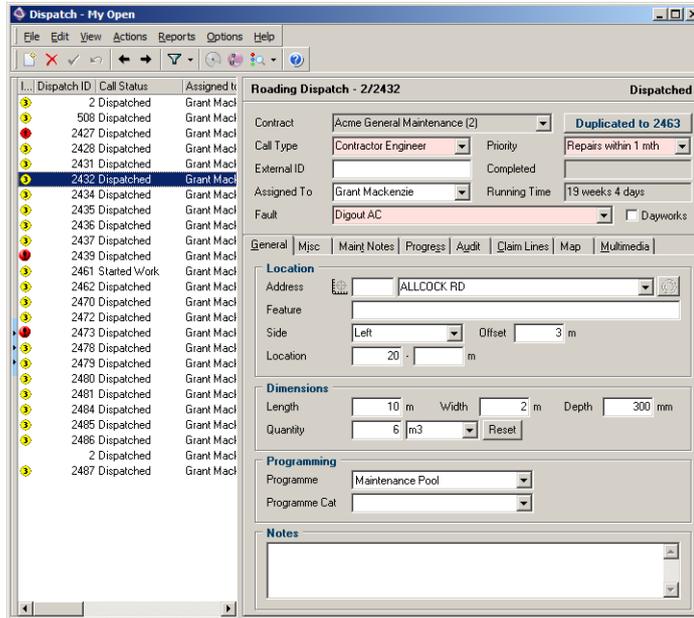
Follow the menu path Actions > Dispatch Entry or press  on the toolbar of the **RAMM Contractor** main screen to open the **Dispatch** filter screen.

▶ To Add a Maintenance Programme Dispatch

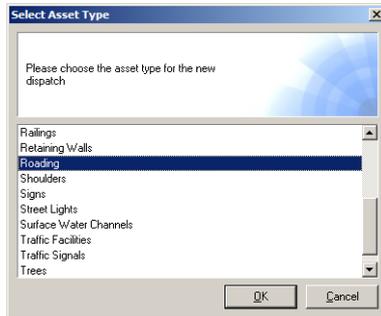


To do this you follow these steps:

- 1 Select the option which matches how you wish to view your Dispatches.
- 2 Press . The **Dispatch** maintenance screen will open.



- 3 Press  or CTRL+N.
The **Select Asset Type** dialog will open for you to choose the Asset type for the Dispatch.



- 4 Select the Asset Type.
- 5 Press .
The **Select Asset Type** dialog will close. A new Dispatch will appear in the List panel. The Dispatch status will be **Entered**. The date and time of entry will default on the Audit Info tab.

A new Dispatch is added to the list. Its ID is zero (0) until it is saved

The date and time default at the Audit tab. So does the source of the Dispatch.

The KPIs are defaulted if you have set them up

Assigned To: [Dropdown] Running Time: Immediate
 Fault: Digout AC [Dropdown] Dayworks:
 General | Misc | Maint Notes | Progress | Audit | Claim Lines | Map | Multimedia

Dispatch Dates
 Entered: 31/01/2008 14:10 in RAMM Contractor, Dispatch Entri
 Programmed: [Dropdown] by [Dropdown]
 Dispatched: [Dropdown]
 Time on Site: [Dropdown]
 Responded: [Dropdown] by [Dropdown] X
 Expected Complete: [Dropdown]
 Completed: [Dropdown] in [Dropdown]

Response Time
 KPI Target: 14 days
 KPI Actual: 0 days*
 Under by: 14 days -

- 6 The values in the fields in the upper section will have defaulted from the previous Dispatch. If these default values are not correct for this Dispatch, select the correct ones from the Contract, Call Type, Priority, Assigned to and Fault drop-down lists. If you select Other - free form from the Fault drop-down list you can type your own Fault description in the Fault field.



Using the Other - free form from the Fault drop-down list and typing your own Fault description in the Fault field is not recommended.

Free form Faults can not be used for Filtering or reports.

- 7 Type a useful value in the External ID field if you use external IDs such as Order Numbers or RFSs.

General | Misc | Maint Notes | Progress | Audit | Claim Lines | Map | Multimedia

Location
 Address: [Dropdown]
 Feature: [Dropdown]
 Side: Centre [Dropdown] Offset: [Text] m
 Location: [Text] m

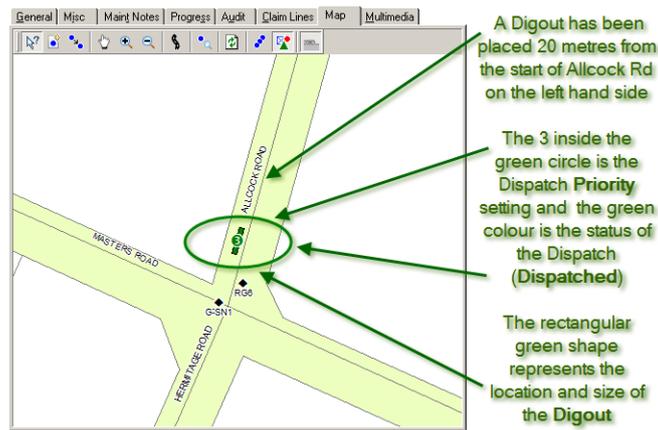
Dimensions
 Length: [Text] m Width: [Text] m Depth: [Text] mm
 Quantity: [Text] [Reset]

Programming
 Programme: [Dropdown]
 Programme Cat: [Dropdown]

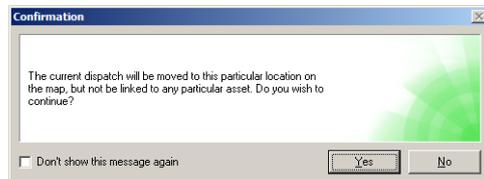
Notes
 [Text Area]

- 8 You should enter as much information as practical at the General tab. The more information you include, the easier it will be for your crew to locate and repair the Fault. The information you enter here also depends on how you identify features on your Network.
- 9 At least select the Road from the Address drop-down list.
- 10 Select Maintenance Pool from the Programme drop-down list.

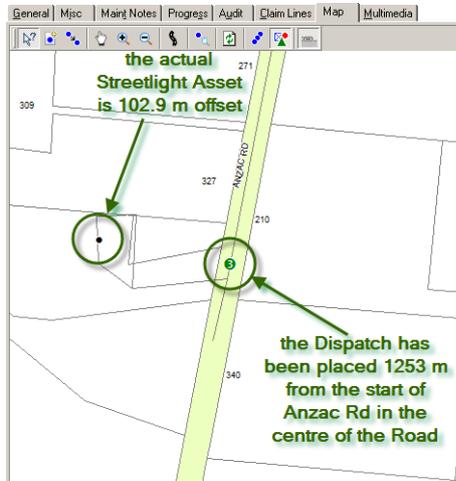
- 11 If you need to associate the Dispatch with an Asset on the **Map**, go to step 14. Otherwise, you have two options. If you wish to place the Dispatch near an Asset, go to step 12. If you just want to place the Dispatch on the Road, type in the first **Location** field, the reference point for the Dispatch. The Dispatch will now be placed on the Road you have selected at the Location you have typed on the side and at the offset you have defined, if any. In the graphic below, a Digout has been placed on the left hand side 20 metres from the start of Allcock Rd. Go to step 20.



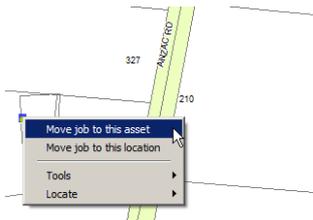
- 12 Press **Select Feature**  and place the mouse pointer over the Asset. Right-click and select **Move job to this location**. The following **Confirmation** dialog will open asking if you really want to proceed.



- 13 Press **Yes** . The dialog will close. With all the dialogs in this procedure, you have the option of selecting the **Don't show this message again** option. The Dispatch is now located adjacent to the Asset but not linked to it. Go to step 20.
- 14 If your Dispatch should be associated with an Asset, by this stage, the Dispatch will be located on the **Map** and the Asset should be nearby. In the example below, a **Streetlight Bulb** is to be replaced for the Asset 1253 metres along Anzac Rd. In this example, the Streetlight is well offset from the Road.



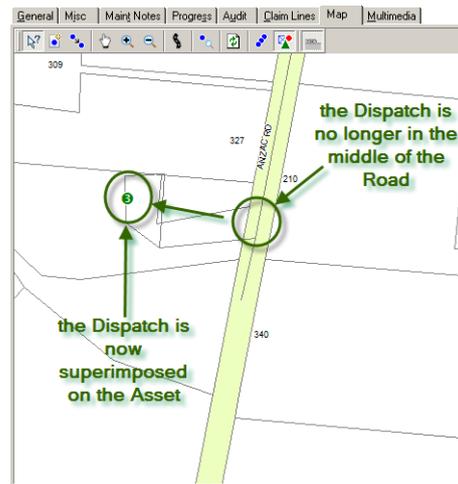
- 15 You now have two choices for associating the Asset with the Dispatch using the **Map**. You press **Select Feature**  and place the mouse pointer over the Asset, in this case, the Streetlight. Right-click and select **Move job to this Asset**.



- 16 A **Confirmation** dialog will open asking if you really want to do this.
- 17 Press .
- The Dispatch will shift to the position of its associated Asset. Go to step 20.
- 18 Otherwise, press **Move Dispatch**  and place the mouse pointer on top of the Asset, in this case, the Streetlight, and left-click. A dialog similar to the following will open.



- 19 Select the option for the Asset, in this case **Street Lights**, and press OK.
A **Confirmation** dialog will open asking if you really want to do this.
- 20 Press **Yes**.
The Dispatch will be positioned with its associated Asset. On the **General** tab and in the **List** panel, the appropriate fields and display will have been updated.



This method applies to all Asset Types.



- 1 Press .
The Dispatch will be saved.

Adding a Maintenance Programme Job

Introduction

A Job is a defined activity generated from within **Pocket RAMM** so that Contractor field crew can repair a Network Fault. In **RAMM Contractor** it is referred to as a Dispatch.

In **Pocket RAMM** you can add Jobs from the **Job** screen or from the **Map** screen. Recommended practice is to add Jobs from the **Map** screen.

When you add a Job which is to be part of a Maintenance Programme, it is recommended practice to add it to the Maintenance Pool. Then, on the 20th of each month, or another date near the end of the Programme period, when the senior staff member of the Contractor reviews the new Jobs to decide into which period they will be Programmed, it is very convenient and efficient because the Jobs are already grouped.

The two most important things to remember when entering a Job are to:

- identify the Asset
- enter precise and helpful Location details for the maintenance crew.

Before you do this you need to have:

- added the Maintenance Pool. You do this at the **Programme** screen in **RAMM Contractor**. See Adding Programmes (on page 38).
- logged in to **Pocket RAMM**
- located the Asset with which to associate the Job and be standing next to it with your PDA.

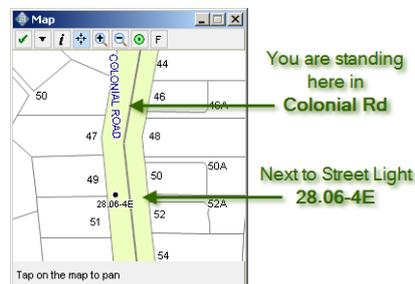
Menu Path

Tap  to open the **Map** screen.

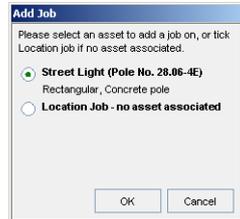
► To Add a Maintenance Programme Job from Pocket RAMM

To do this you follow these steps:

- 1 The **Map** screen will be open. It will show the Asset for the Job because you are standing next to it. In this case it is Streetlight 28.06-4E in Colonial Road.



- 2 Tap  and select Add Job.
- 3 Tap on the Asset. In this example Streetlight 28.06-4E has been tapped. The **Add Job** dialog will open. You will be offered the opportunity to add the Job to the Asset or to a Location with no relationship to the Asset. Unless the Job is a Roading Job such as a Pot hole, select the Asset option.



- 4 Tap .

The **Jobs** screen will open at the **Detail** tab. The details you see will depend on the Asset for which you are adding a Job.



- 5 Select the appropriate values from the **Call Type**, **Fault** and **Priority** drop-down lists. Select the appropriate values from any other relevant drop-down lists.

- 6 Select **Maintenance Pool** from the **Programme** drop-down list.

- 7 Tap the **Misc** and **Location** tabs and add values subject to your normal business practices.

- 8 Tap  to save the Job.

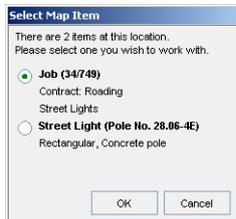
The Jobs screen will close and the **Map** screen will open. The Asset will be highlighted to show that there is an associated Job.



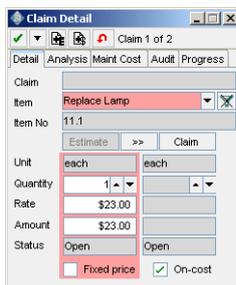
The Street Light 28.06-4E icon has changed to show that there is an associated Job

The Job number J749 is now associated with the Asset on the Map

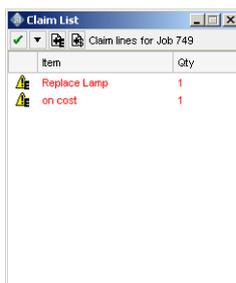
- 9 Tap on the Job. The **Select Map Item** dialog will open.



- 10 Select the option for the Job which you have just added.
- 11 Press . The **Job Detail** screen will reopen.
- 12 Tap to open the **Claim Line** screen.
- 13 Tap to open the **Claim Line** screen at the Details tab.



- 14 Add the Estimate line. On completion of the Job the Estimate line automatically copies over to become a Claim line.
- 15 Select the item for the Estimate line from the **Item** drop-down list. The finance fields in the lower section of the field should default.
- 16 Adjust the value in the **Quantity** field if required.
- 17 Tap the **Maint Cost** tab and make sure there are values in the **Cost Group**, **Activity** and **Fault** fields or you can not save the record.
- 18 Tap . The Estimate will be saved. The **Claim Line** screen will open at the Claim Line list panel. The Estimates associated with the Job will be listed.



- 19 If you need to add another line, go to step 12. Otherwise tap  three times to return to the **Pocket RAMM** grey screen. You have now added a Job which has been scheduled into the **Maintenance Pool** and can be allocated to a monthly Programme by the Contractor staff member who has responsibility for this.

Estimate Presentation Best Practice

The recommended practice for a Contractor dealing with Estimates is that during the Programme period, the Contractor or one of the senior staff members will open the **RAMM Contractor** Estimate Review Tool.

This person will check the Estimates and edit the Dispatches if necessary. While checking and editing they will add the Estimated Dispatches to the appropriate Programme Header. This will usually be the Programme period following.

Present in Bulk

Once the Contractor or one of the senior staff members is satisfied that they have the correct number and value of Estimate lines in the Programme for the following period, they can, with a click of their mouse, Present them all, to the Network Owner.

This is the proposed Programme of works for the following period.

Accept Hold Reject

The Network Owner can then Accept, Hold or Reject those Estimates.

When the Contractor opens the Estimate Review Tool they can immediately see the Accepted, Held and Rejected Estimates.

Address and Present Again

The Contractor then has the opportunity deal with the Rejected and Held Estimates.

Rejected Estimate lines can not be amended. They need to be replaced with a new Estimate line or abandoned.

Once the Held Estimate lines are addressed, taking into account the instructions from the Network Owner on how to amend the lines so that they are acceptable, the Contractor can then Present them again between 20th and the last day of the month so that they can still be included in the Maintenance Programme for the following period.

The Network Owner may still not Accept some or all of the Estimate lines Presented again.

So there may be more addressing and Presenting of the Estimate lines before the Programme for the following period is agreed.

Pending Estimate and Claim Lines

If a Contractor wants to withhold an Estimate or Claim line from being Presented, they can change the status to Pending by pressing the appropriate Pending button  or . This would be done when, for instance, the cost was unable to be charged to the Network Owner because necessary information, such as a third party invoice had not arrived. Pending lines can be Presented at a later stage.

Setting a line as Pending highlights the line and distinguishes between a line which the Contractor has withheld from being Presented from one which has been withheld from payment by the Network Owner and so has a status of Held.

The Network Owner can still see the line in the Claim and Estimate Review Tools but will know to ignore it.

Estimate Review Tool

You use the Estimate Review Tool to analyse and group Estimate lines. It also enables Contractors and Network Owners to handle Estimate lines in bulk.

The Contractor should use this Tool at all stages of the Estimation process.

Once the Contractor has checked the Estimate lines and associated them with the appropriate Programme of works, they can Present them to the Network Owner in bulk by right-clicking on the total and selecting the Present all Estimates option. This option is available only after double-clicking on the Total cell to open the **Dispatch** maintenance screen in order to deal with the Estimate lines.

Best Practice Not Followed

Each month, or other period as per the contract provisions, the Contractor staff who follow the recommended practice will have created a large number of Dispatches which could include open Estimate lines and have been assigned to the Maintenance Pool.

However, Dispatches or Jobs can be added by any user with sufficient Security Permissions. These users can be Contractor staff, Network Owner staff or Consultant staff. So as well as the Dispatches which have been added according to the recommended practice, there may well be others which have not.

Maximise Efficiency

You use the Estimate Review Tool to deal with all these Estimates in a coordinated fashion.

In the graphic below you can see that the Estimate Review Tool filters and groups Estimate lines.

It then Presents the totals in a readily understandable fashion.

| Estimate Status | Not Programmed | MaintenancePool | Aug-08 | Sep-08 | Oct-08 | Nov-08 | Dec-08 | Jan-09 |
|------------------------|----------------|-----------------|-----------------|--------|--------|--------|--------|--------|
| Open Estimates | \$2,271 | \$10,494 | | | | | | |
| Accepted | | | \$37,779 | | | | | |
| Held Estimates | | | \$77 | | | | | |
| Rejected Estimates | | | \$8,045 | | | | | |
| Total Estimates | \$2,271 | \$10,494 | \$45,900 | | | | | |

Open Estimates not in Maintenance Pool

You will notice in the graphic above that there are \$2,271 worth of Open Estimates in the Not Programmed group. If the recommended practice has been followed, these will be for Dayworks and so should not be in a Programme.

When the Contractor is reviewing these Estimate lines as part of Dayworks recommended practice, it may be discovered that these Dispatches or Jobs have been added by Contractor staff who did not follow the recommended practice or by Network Owner or Consultant staff who have not been trained. The Contractor will need to check and edit these carefully before placing them in the correct Programme and Presenting them.

The Contractor should also find the person who entered the Estimate lines and advise them of the recommended practice to avoid the situation in the future.

Open Estimates in the Maintenance Pool

In the graphic above in there are \$10,494 worth of Open Estimates in the Maintenance Pool. These will be dealt with and Presented to the client on or before a regular date such as the 20th of the month.

Accepted Estimates in August Programme

You will notice in the graphic above that there are \$37,770 worth of Accepted Estimates in the Aug-08 Programme. These need no further attention at this stage.

Held Estimates in August Programme

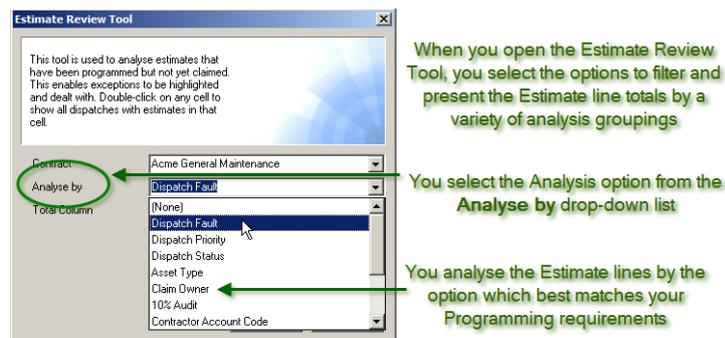
You will notice in the graphic above that there are \$77 worth of Held Estimates in the Aug-08 Programme. The Contractor needs to investigate and edit these Estimates before Presenting them again.

Rejected Estimates in August Programme

You will notice in the graphic above that there are \$8,045 worth of Rejected Estimates in the Aug-08 Programme. This is rather a lot really. The Contractor will need to deal with these records.

Estimate Review Tool – Analysis Groups

It is recommended that on or before a regular date such as the 20th of the month, the Contractor reviews the Maintenance Pool Dispatches. The Estimate Review Tool filters and groups the Dispatches to help with the Programming decisions.



Analysis Options

Every Contractor will Programme their work differently depending on their circumstances. For instance, they may make Programme choices to match staff numbers. Perhaps, the Network Owner wants to concentrate on broken kerb and channel or some other Fault for the Programme period. It may make sense to concentrate on Priority One Jobs.

The Estimate Review Tool can group Dispatches for Programming and review.

Analyse by Dispatch Fault

You would use the Estimate Review Tool to analyse Dispatches by Dispatch Fault if you need to target or focus on a particular Fault for the particular Programme period. You would do this if your priority for the Programme period were a particular Network Fault such as potholes or broken kerb and channel.

Analyse by Dispatch Priority

You would use the Estimate Review Tool to analyse your Dispatches by Dispatch Priority if you wanted to Programme the most urgent Dispatches first.

Analyse by Dispatch Status

You use the Estimate Review Tool to analyse your Dispatches by Dispatch Status to group them into Entered, Dispatched and Completed. You do this if Dispatched and Completed Dispatches are in the Maintenance Pool in error.

Analyse by Asset Type

A Contractor would use the Estimate Review Tool to analyse Dispatches by Asset Type if, for instance, they used a subcontractor to for all work related to Signs and wanted to check that there was enough work for the period.

Analyse by Claim Owner

You would use the Estimate Review Tool to analyse Dispatches by Claim Owner only in very specific circumstances. For instance, if you had a Street Lighting contract and you had to Claim from both a local authority and an electricity company depending on the work done to the Street Lights.

Analyse by Contract Dispatch Group

Contract Dispatch Groups are used to group Dispatches for analysis and reporting purposes for an individual Contract. You create them only if a standard **RAMM Contractor** function to group the Dispatches does not already exist. You would use the Estimate Review Tool to analyse your Dispatches by Dispatch Group for reasons related to the purpose of the Dispatch Group which you defined.

Analyse by Account Code

You would use the Estimate Review Tool to analyse your Dispatches by Account Codes to match Programme expenditure to budget requirements.

Analyse by Programme Header

You would use the Estimate Review Tool to analyse your Dispatches by Programme Header if you wanted to compare Programme periods.

Analyse by Programme Status

You would use the Estimate Review Tool to analyse your Dispatches by Programme Status to compare the Estimate totals by different Programme statuses.

Analyse by Programme Category

Programme Categories are a user-defined method of grouping Dispatches within a Programme. You would use the Estimate Review Tool to analyse your Dispatches by Programme Category for reasons related to the purpose of the Programme Categories which you defined. For instance, some users define Programme Categories as prioritisation codes different from the Dispatch Priority codes defined in the contract. These user-defined Programme Categories help the Contractor prioritise Programme Dispatches based on their own criteria.

Reviewing the Programme Estimates

Introduction

The recommended practice for a Contractor dealing with Estimates is that during the Programme period, the Contractor or one of the senior staff members will open the **RAMM Contractor** Estimate Review Tool.

This person will check the Estimates and edit the Dispatches if necessary. While checking and editing they will add the Estimated Dispatches to the appropriate Programme Header. This will usually be the Programme period following.

Before you do this you need to have:

- added the **Maintenance Pool** and the Programmes for each Programme period of the contract. You do this at the **Programme** screen. See Adding Programmes (on page 38).
- added Dispatches with Estimate lines if you use **RAMM Contractor**. You do this at the **Dispatch** screen. See Adding a Maintenance Programme Dispatch (on page 40).
- added Jobs with Estimate lines if you use **Pocket RAMM**. You do this at the **Jobs** screen. See Adding a Maintenance Programme Job (on page 45).

Menu Path

Follow the menu path Actions > Estimate Review Tool to open the **Estimate Review Tool** dialog.

► To Review the Programme Estimates

To do this you follow these steps:

- 1 Select your Contract from the Contract drop-down list.

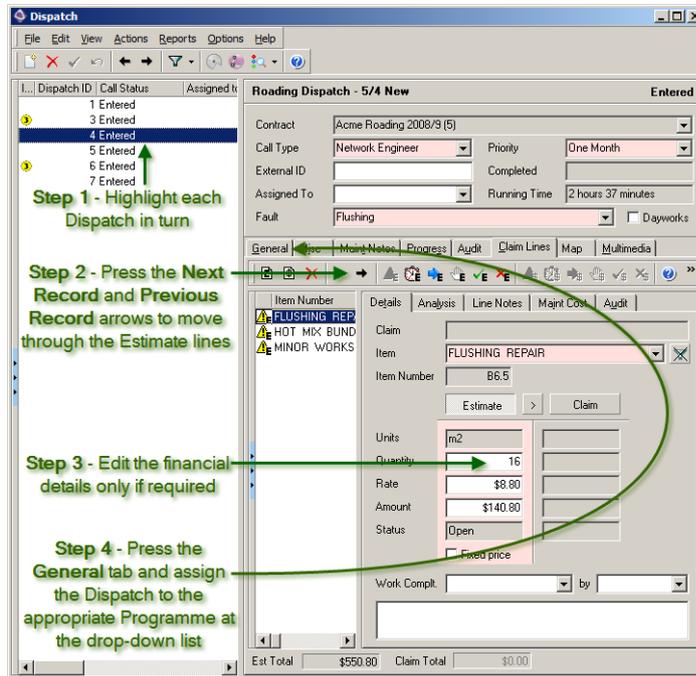


- 2 You now have the option to filter what you are going to see by analysis and Estimate parameters. See Estimate Review Tool - Analysis Groups (on page 52). Make your choices and press . The Estimate Review Tool will open.

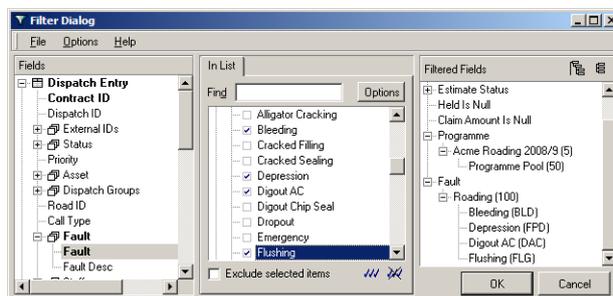
Typically, the Dayworks, if any, will be in the **Not Programmed** column and the Dispatches not yet in a Programme period will be in the **Maintenance Pool**. In the graphic below, the Estimate lines have been grouped by Dispatch Priority to enable the most pressing Dispatches to be Programmed first.

| Estimate Status | Total | Not Programmed | Maintenance Pool | July 2008 | August 2008 | September 2008 | October 2008 | November |
|--|--------------------|--------------------|-------------------|-----------|-------------|----------------|--------------|----------|
| Dispatch Priority: Immediate (2) | | | | | | | | |
| Open Estimates | \$1,665.80 | | \$1,665.80 | | | | | |
| Total Estimates | \$1,665.80 | | \$1,665.80 | | | | | |
| Dispatch Priority: One Month (4) | | | | | | | | |
| Open Estimates | \$9,600.90 | \$3,237.60 | \$6,363.30 | | | | | |
| Total Estimates | \$9,600.90 | \$3,237.60 | \$6,363.30 | | | | | |
| Dispatch Priority: One Week (3) | | | | | | | | |
| Open Estimates | \$9,290.00 | \$9,290.00 | | | | | | |
| Total Estimates | \$9,290.00 | \$9,290.00 | | | | | | |
| Dispatch Priority: When Budget Allows (5) | | | | | | | | |
| Open Estimates | \$1,386.65 | \$500.00 | \$886.65 | | | | | |
| Total Estimates | \$1,386.65 | \$500.00 | \$886.65 | | | | | |
| Total | | | | | | | | |
| Open Estimates | \$21,943.35 | \$14,693.40 | \$7,249.95 | | | | | |
| Total Estimates | \$21,943.35 | \$14,693.40 | \$7,249.95 | | | | | |

- 3 Double-click on the open Estimates in the **Not Programmed** column to open the **Dispatch** screen with the open Dispatches listed. Check the Dispatches. If there are any Dispatches which are there in error and should be Programmed, then edit, assign and Present them as below.
- 4 Double-click on the open Estimates in the **Maintenance Pool** column to open the **Dispatch** screen with the open Dispatches listed.



- 5 At this stage, you may want to further filter the Dispatches to refine the list to a more discrete set. If so go to step 6. Otherwise, go to step 8.
- 6 Press  to open the **Filter** dialog.



- 7 In the example above, the Dispatches which have been filtered by Priority using the Analyse By drop-down list on the **Estimate Review Tool** dialog, are going to be further filtered by Fault. Make your selections and press  to close the screen. See the Filters chapter of the *Using RAMM* guide for further information.
- 8 Highlight each Dispatch in turn and use the  and  buttons to move through the Estimate lines. Edit the financial information if required.
- 9 Press the **General** tab and assign the Dispatch to the appropriate Programme at the Programme drop-down list.

- 10 When you have finished checking, editing and Programming your Dispatches, close the **Dispatch** screen using your preferred method and you will be returned to the **Estimate Review Tool**.
- 11 If there is another Open Estimates grouping which you need to review and Programme, go to step 4. Otherwise go to step 12.
- 12 Close both **Estimate Review Tool** screens. You will be returned to the **RAMM Contractor** main screen.



The Maintenance Pool should only ever have a status of Open as it is a holding pen only.

Presenting Estimates

Introduction

The recommended practice for a Contractor dealing with Estimates is that once a month, near the 20th of the month or another agreed date, the Contractor or one of the senior staff members will use the **RAMM Contractor** Estimate Review Tool to review the Estimates and edit the Dispatches if necessary. They will assign the Estimate lines to the appropriate Programme Header. This will usually be the Programme period following.

When they have a Programme of work which reflects the priorities and budget limitations of the Network Owner, they Present the Estimate lines in bulk using the Estimate Review Tool.

Before you do this you need to have:

- reviewed and Programmed the Dispatches and checked the Estimate lines. You do this at the **Dispatch** screen and the Estimate Review Tool. See Reviewing the Programme Estimates (on page 54).

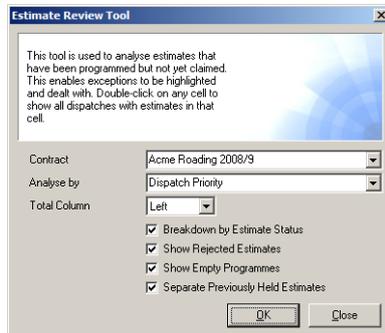
Menu Path

Follow the menu path Actions > Estimate Review Tool to open the **Estimate Review Tool** dialog.

► To Present Estimates

To do this you follow these steps:

- 1 Select your Contract from the **Contract** drop-down list.



- 2 You now have the option to filter what you are going to see by analysis and Estimate parameters. As you are going to Present the Estimate lines in bulk, you should not split them into groups. Make your choices and press to open the **Estimate Review Tool** screen. Typically, the Dayworks will be in the Not Programmed column, the Programmed Dispatches will be in their Programme period and those waiting to be Programmed will be in the Maintenance Pool as in the graphic below.

| Estimate Status | Total | Not Programmed | MaintenancePool | July 2008 | August 2008 | September 2008 | October 2008 | November |
|------------------------|--------------------|-------------------|-------------------|--------------------|-------------|----------------|--------------|----------|
| Open Estimates | \$21,943.35 | \$4,269.40 | \$5,449.15 | \$12,224.80 | | | | |
| Total Estimates | \$21,943.35 | \$4,269.40 | \$5,449.15 | \$12,224.80 | | | | |

This is the Estimate total

The Not Programmed Estimates are Dayworks and so will never be Programmed

The Maintenance Pool contains the Estimates which have not been selected for the July Programme

This total of the Programmed Estimates is going to be Presented as the proposed Programme of works for July

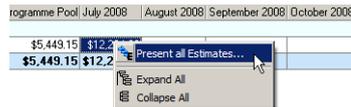
- 3 Double-click in the Open Estimates cell for the Programme period whose Estimates you want to Present.
The **Dispatch** maintenance screen will open with all the Dispatches for the Programmed Open Estimate lines listed.



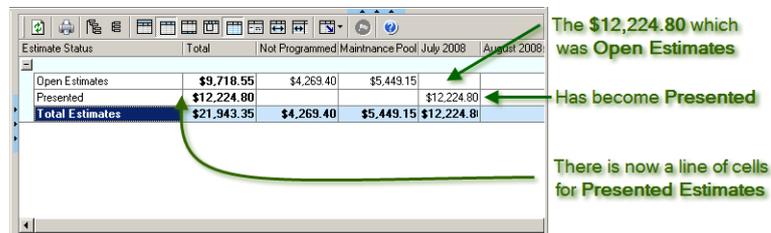
If you do not double-click in the cell to open the **Dispatch** maintenance screen, the Present all Estimates option will not be enabled.

- 4 Review and edit the Open Estimates if necessary.

- 5 Close the **Dispatch** maintenance screen.
You will be returned to the **Estimate Review Tool** screen.
- 6 Highlight the **Open Estimates** total in the Programme period, right-click and select **Present all Estimates...** to open a **Confirmation** dialog will open asking if you really want to Present all the Estimates.



- 7 Press to Present the Estimates in bulk.
The total which was in the **Open Estimates** line of the Programme period column will now appear in the **Presented** line in the Programme period which you have chosen.
The Estimates have now been Presented to the Network Owner for Acceptance.



- 8 Close both **Estimate Review Tool** screens.
You are returned to the **RAMM Contractor** main screen.



This applies only to Presented Estimate lines from Jobs and Dispatches which have not been Completed.

NOTE

Addressing Held Estimate Lines

Introduction

Recommended practice is that during the Programme period, the Contractor or one of the senior staff members has Presented the Estimate lines to the Network Owner using the **RAMM Contractor** Estimate Review Tool. The Network Owner can then access the Estimate lines and has the option to Accept, Reject or place the Presented Estimate lines on Hold.

Once the Network Owner has done this, the Contractor must then address the Held Estimate lines.

Before you do this you need to have:

- Presented the Programmed Estimate lines to the Network Owner. You do this using the Estimate Review Tool. See Presenting Estimates (on page 57).

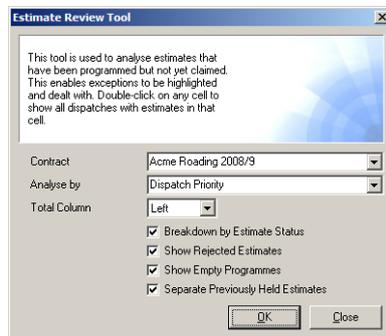
Menu Path

Follow the menu path Actions > Estimate Review Tool to open the **Estimate Review Tool** dialog.

► To Address Held Estimate lines

To do this you follow these steps:

- 1 Select your Contract from the Contract drop-down list and select the analysis and Estimate parameters so that the **Estimate Review Tool** screen will display the information you require.

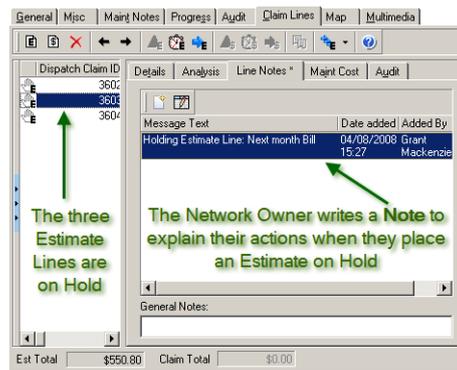


- 2 Press .

The **Estimate Review Tool** screen will open. Typically, most of the Estimate lines will have been Accepted by the Network Owner and the total will appear in the Accepted line of the Programme period. Those Claim lines which have been placed on Hold or Rejected will be in the Held Estimates and Rejected Estimates lines respectively.

| Estimate Status | Total | Not Programmed | Maintenance Pool | July 2008 | August 2008 | September 2008 | October 2008 | November |
|------------------------|--------------------|-------------------|-------------------|--------------------|-------------|----------------|--------------|----------|
| Open Estimates | \$9,474.65 | \$4,269.40 | \$5,205.25 | | | | | |
| Accepted | \$9,710.00 | | | \$9,710.00 | | | | |
| Held Estimates | \$2,508.70 | | | | \$2,508.70 | | | |
| Rejected Estimates | \$252.00 | | | | | \$252.00 | | |
| Total Estimates | \$21,693.35 | \$4,269.40 | \$5,205.25 | \$12,218.70 | | | | |

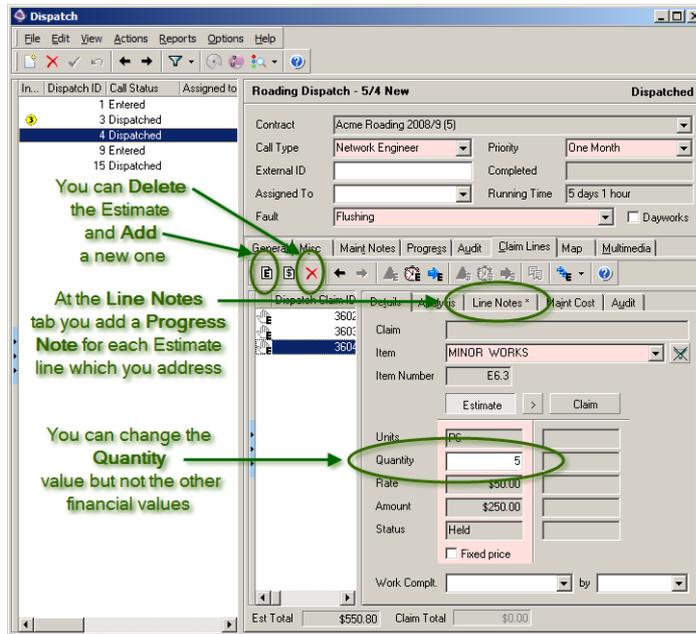
- 3 Double-click in the **Held Estimates** total for the Programme period, to open the **Dispatch** maintenance screen with the **Held Dispatches** listed.
- 4 Select the **Held Estimate** line you wish to address.
- 5 Press the **Line Notes** tab to view the note from the Network Owner explaining the reason for placing the Estimate line on Hold.



- 6 What you do next depends on the reason why the Estimate has been placed on Hold. In the example shown above, the Network Owner has asked the Contractor to place the Dispatch in the following Programme period. So the Dispatch is Programmed into the August 2008 period and its status is changed to **Open**.

Please note that you can:

- delete the Estimate line and replace it with another if required
- change the quantity but not the price.
- add a note to explain your changes or to reply to a Network Owner question.
- place **Rejected** Estimate lines into the **Not Programmed** column.



7 Do you want to address another Held Estimate line?

| | |
|------------|--------------------|
| Yes | then go to step 4. |
| No | then go to step 8. |

8 Close the **Dispatch** maintenance screen. You will be returned to the **Estimate Review Tool** screen. Some of the figures in the Programme period column will have changed. If you have deleted an Estimate line and replaced it with a new Estimate line, this will appear in the Open Estimates line. Generally, the addressed Estimates will be in the Previously Held Estimates row. The Held Estimates and Total Estimates totals will reflect the changes you have made. The Accepted Estimates total will be the same.

| Estimate Status | Total | Not Programmed Maintenance Pool July 2008 | August 2008 | September 2008 | October 2008 | November 2008 |
|---------------------------|--------------------|---|-------------------|-------------------|-------------------|---------------|
| Open Estimates | \$9,474.65 | \$4,269.40 | \$5,205.25 | | | |
| Accepted | \$9,710.00 | | \$9,710.00 | | | |
| Previously Held Estimates | \$2,508.70 | | \$250.00 | \$2,258.70 | | |
| Rejected Estimates | \$252.00 | \$252.00 | | | | |
| Total Estimates | \$21,693.35 | \$4,269.40 | \$5,205.25 | \$9,960.00 | \$2,258.70 | |

9 Highlight the Previously Held Estimates total for the Programme period. In the graphic above this is July 2008.

10 Right-click and select Present all Estimates... A **Confirmation** dialog will open asking if you really want to Present all the Estimates.

- 11 Press to Present the Estimates in bulk.
 The total which was in the **Previously Held Estimates** total for the Programme period column will not change. This is the total for the Network Owner to review. In the graphic below, the **Separate Previously Held Estimates** option has been turned off and the total for the Network Owner to review is in the **Presented** cell.

| Estimate Status | Total | Not Programmed | Maintenance Pool | July 2008 | August 2008 | September 2008 | October 2008 | November |
|------------------------|--------------------|-------------------|-------------------|-------------------|-------------------|----------------|--------------|----------|
| Open Estimates | \$11,733.35 | \$4,269.40 | \$5,205.25 | | \$2,258.70 | | | |
| Presented | \$250.00 | | | \$250.00 | | | | |
| Accepted | \$9,710.00 | | | \$9,710.00 | | | | |
| Rejected Estimates | \$252.00 | \$252.00 | | | | | | |
| Total Estimates | \$21,693.35 | \$4,269.40 | \$5,205.25 | \$9,960.00 | \$2,258.70 | | | |

- 12 The Estimates have now been Presented to the Network Owner for Acceptance. Close both **Estimate Review Tool** screens.
 You will be returned to the **RAMM Contractor** main screen.

Claim Presentation Best Practice

Recommended practice is that on the first of each Maintenance Contract period, the Contractor and Network Owner have already agreed the Programme for the period. The agreed works are the Accepted Estimates as shown in the Estimate Review Tool for the particular Maintenance Programme period. These are the Jobs which the Contractor and staff should perform this Claim period.



Please note that this section does not deal with Dayworks and other work not Programmed.

NOTE

Assign and Complete Jobs

From the first day of the Claim period and regularly throughout the Claim period, the Contractor will assign Jobs to his staff which they will perform and Complete.

Accepted Estimate line Becomes Claim Line

When a Job is Completed, the Estimate lines automatically become Claim lines. These default into an open Claim Header. The user completing the Claim has the option to choose the Claim Header if more than one is open. This is why recommended practice is to have only one Claim Header open at any one time. See Adding a Claim Header (on page 83).

Claim Line Review

Throughout the Claim period, the Contractor will use the Claim Review Tool to review the Claim lines. Where the Estimate differs and was changed as a result of extra work or materials required, the Contractor edits the Estimate lines and ensures that there is sufficient information contained in the Dispatch to justify the increase in price to the Network Owner.

These Estimate lines will automatically copy over to become Claim lines when the Dispatch is Completed. The original Estimate line amount will remain untouched.

Pending Claim and Estimate Lines

If a Contractor wants to withhold an Estimate or Claim line from being Presented, they can change the status to Pending by pressing the appropriate Pending button  or . This would be done when, for instance, the cost was unable to be charged to the Network Owner because necessary information, such as a third party invoice had not arrived. Pending lines can be Presented at a later stage.

Setting a line as Pending highlights the line and distinguishes between a line which the Contractor has withheld from being Presented from one which has been withheld from payment by the Network Owner and so has a status of Held.

The Network Owner can still see the line in the Claim and Estimate Review Tools but will know to ignore it.

Claim Line Presentation

When the Contractor has finished reviewing and editing the Claim Header, it is Presented to the Network Owner who will then review the Claim lines. They will either Accept, Reject or place them on Hold. If placed on Hold, the Network Owner must make a note for the Contractor explaining why the Claim line has been Held or leave a note giving instructions on how to amend the Claim line.

Unchanged Claim Lines Approved

If the Estimate line was accurate and remains unchanged when the user completes the Dispatch, it can be Accepted by the Network Owner without review. This is because the Network Owner has already approved the Estimate lines for the maintenance period.

Held Estimate Lines

Throughout the Claim period, the Contractor uses the Estimate Review Tool to review the Estimate lines. Where the Estimate line was Held, there is the option to review it based on the explanatory notes made by the Network Owner and to Present it again once any necessary changes have been made.

**NOTE**

Please note that it is recommended practice to make explanatory notes if there is a large difference between the Estimate and the Claim amount.

Held Claim Lines

Throughout the Claim period, the Contractor uses the Claim Review Tool to review the Claim lines. Where the Claim line was Held, there is the option to review it based on the explanatory notes made by the Network Owner Present it again once any necessary changes have been made.

Prepare Claim

At or near the time of maintenance period end, the Contractor will want to close off the Claim. This is done by Preparing the Claim Header. No further Claim lines can be added to the Claim Header after this action.

Disputed Claim Lines

The disputed Claim lines are then removed from the Claim. They are dealt with under a separate disputes procedure.

Present Claim

When the Claim includes only those Claim lines which the Network Owner has agreed to pay, the Contractor Presents the Claim. This total is what should be received from the Network Owner.

Claim Information to RAMM

Once the Contractor has been paid, they close the Claim and export the Claim information into **RAMM**. This updates the database to include all the Maintenance Cost data required by the Network Owner. This data is used for engineering analysis of the Network.

Jobs for the Programme Period

Recommended practice is that on or before the first day of the maintenance period, the Network Owner and the Contractor will have agreed a Programme of works for the period which:

- is within the budget of the Network Owner
- includes the type of Jobs the Network Owner requires completed during this period

- matches the available personnel and equipment of the Contractor.

The Contractor can then assign the Jobs and Dispatches to his staff. Whether this is done on a daily or monthly basis depends on the business practices of the Contractor.

Assigning Dispatches in Bulk

Introduction

You assign Jobs and Dispatches to individual staff or crew at the **Dispatch** screen. It is more efficient to do this in bulk.

What you do will depend on your own business practices. For instance, you may assign all Jobs in a particular area to individual staff or crew. You may assign all Dispatches of a particular type to individual staff or crew.

Before you do this you need to have:

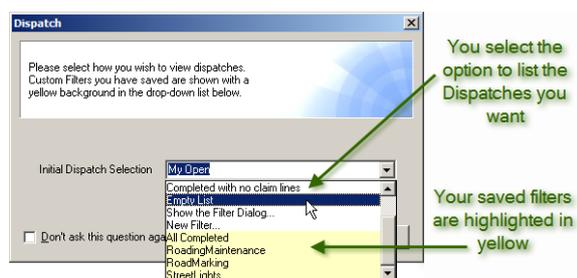
- an Accepted Programme of works for the period from the Network Owner. See Estimate Presentation Best Practice (on page 49).
- added the staff or crew in **RAMM Contractor**. See the Staff Permissions chapter of the *RAMM Contractor* guide.

Menu Path

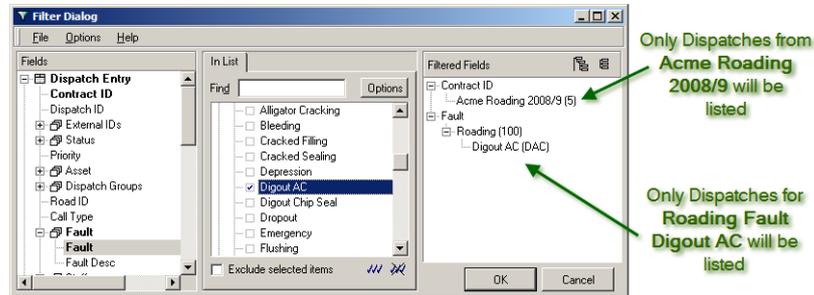
Follow the menu path Actions > Dispatch Entry or press  on the toolbar of the **RAMM Contractor** main screen to open the **Dispatch** filter screen.

► To Assign Dispatches in Bulk

To do this you follow these steps:



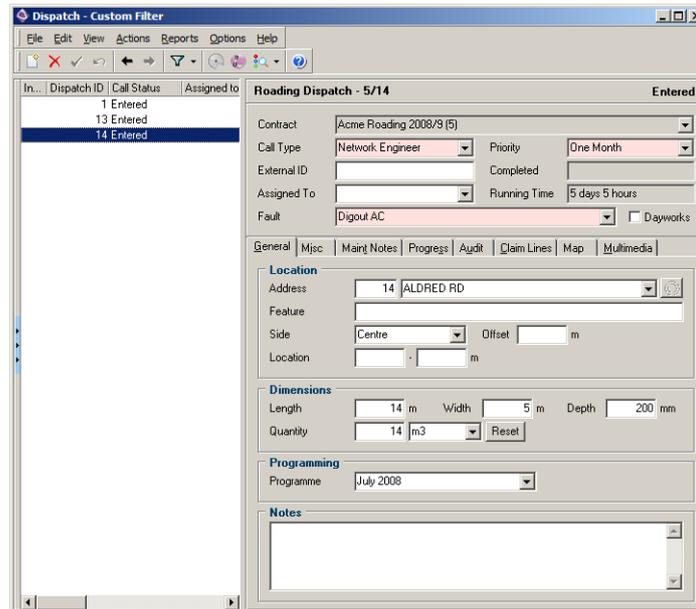
- 1 Select **Show the filter dialog** from the Initial Dispatch Selection drop-down list.
- 2 Press .
The **Filter Dialog** screen will open.



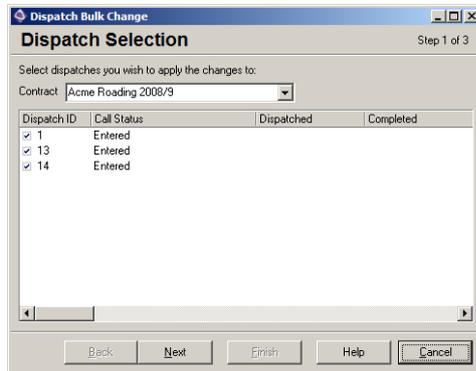
3 Select your filter parameters. In the graphic above the appropriate Contract has been selected and the Roding Fault Digout AC has been selected so that all the Digout AC Dispatches can be assigned to the same crew.

4 Press .

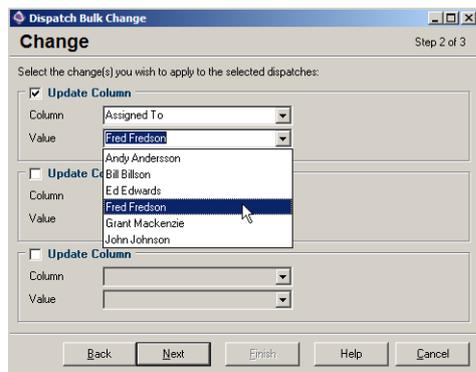
The **Dispatch** maintenance screen will open with the filtered Dispatches listed in the (unnamed) Dispatch List panel. In the example below, all Dispatches with Faults of Digout AC have been listed.



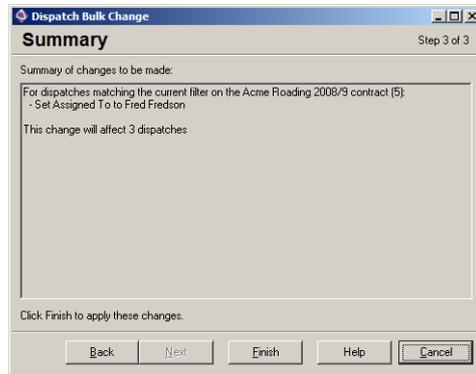
5 Follow the menu path Actions > Bulk Change to open the **Dispatch Bulk Change** screen.



- 6 Check that the correct Contract is selected at the Contract drop-down list.
- 7 Check that all the Dispatches you want to assign are selected.
- 8 Press .
The Change panel will open.



- 9 Select, from the Column check box, Assigned to.
- 10 Select, from the Value drop-down list, the individual staff or crew to whom you want to assign the Dispatches.
- 11 Press .
The Summary panel will open. The notes will summarise to whom the Dispatches are to be assigned and the number of Dispatches which will be affected if you carry on.



- 12 Press . The **Dispatch Bulk Change** screen will close and you will be returned to the **Dispatch** maintenance screen. All the newly-assigned Dispatches will be highlighted.

| Dispatch ID | Call Status | Assigned to |
|-------------|-------------|--------------|
| 1 | Dispatched | Fred Fredson |
| 12 | Dispatched | Fred Fredson |
| 13 | Dispatched | Fred Fredson |

- 13 Press . You changes will be saved.
- 14 If you want to assign more Dispatches in bulk, press to open the filter and go to step 2. Otherwise close the screen in the normal fashion to be returned to the **RAMM Contractor** main screen.

Completing a Job with Estimate Lines

Introduction

Individual staff will have Jobs assigned to them. When they have completed the Jobs, they need to set the status of the Job to **Complete**. This has the effect of closing off the Estimate lines and changing them into Claim lines. See Contractor Claim Lines Review (on page 74).

If an Estimate line was inadequate, you still **Complete** the Job as this makes the Estimate Lines into Claim lines. The Estimate lines will then become greyed out and unable to be entered or edited. This maintains the original approved Estimate value. New Claims can be adjusted as appropriate.

If the staff or crew have done work for which no Estimate line exists, a new Claim line should be added with no matching Estimate line. It is too late to have an Estimate approved when the work has already been done.

Before you do this you need to have:

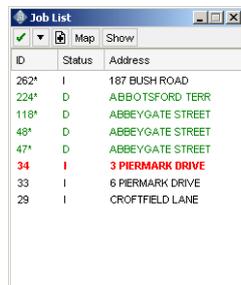
- been assigned the Job. You do this in bulk at the **Dispatch** screen. See Assigning Dispatches in Bulk (on page 66).
- finished the actual work required
- logged in to **Pocket RAMM**.

Menu Path

Tap  to open the **Jobs** screen with a list of the Jobs assigned to you.

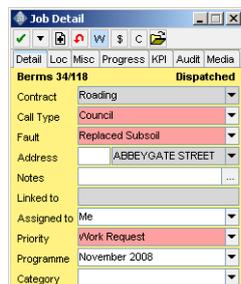
► To Complete a Job with Estimate Lines

To do this you follow these steps:



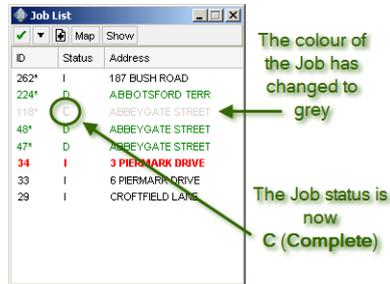
| ID | Status | Address |
|------|--------|------------------|
| 262* | I | 187 BUSH ROAD |
| 224* | D | ABBOTSFORD TERR |
| 118* | D | ABBEYGATE STREET |
| 48* | D | ABBEYGATE STREET |
| 47* | D | ABBEYGATE STREET |
| 34 | I | 3 PIERMARK DRIVE |
| 33 | I | 6 PIERMARK DRIVE |
| 29 | I | CROFTFIELD LANE |

- 1 Tap the Job you want to work on. This will open the **Detail** panel. Read all the Job information such as the notes and other information under the **Misc** tab.

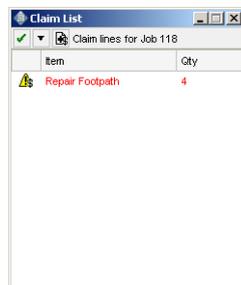


| Detail | Loc | Misc | Progress | KPI | Audit | Media |
|---------------------------------------|------------------|------|----------|-----|-------|-------|
| Berms 34/118 Dispatched | | | | | | |
| Contract | Roading | | | | | |
| Call Type | Council | | | | | |
| Fault | Replaced Subsoil | | | | | |
| Address | ABBEYGATE STREET | | | | | |
| Notes | | | | | | |
| Linked to | | | | | | |
| Assigned to | Me | | | | | |
| Priority | Work Request | | | | | |
| Programme | November 2008 | | | | | |
| Category | | | | | | |

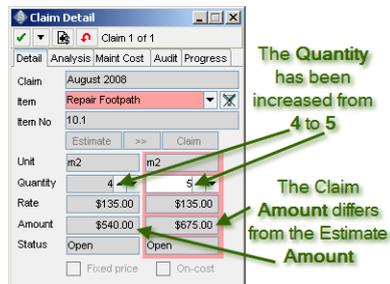
- 2 Tap  and select **Work** on Job. If this were an Asset Job you would press  instead.
- 3 Tap  to complete the Job. A **Confirm** dialog will open asking if you are sure you want to complete the Job.
- 4 Tap  to return to the **Jobs** list screen. Your Job will now display as complete. The Estimate lines will have been converted to Claim lines. If the Estimate lines were all accurate, go to step 11. If you need to alter or add a Claim line, go to step 4.



- 5 Tap the Job you have just finished. This will open the Detail panel.
- 6 Tap to open the **Claim Line** list screen. The lines which were Estimate lines now display as Claim lines. If you need to change a Claim line go to step 6. Otherwise go to step 9.



- 7 Tap on the Claim line which you need to change. This will open the Details tab.



- 8 Tap the up and down arrows to change the Quantity value. The Amount value will change.
- 9 Press to save your changes. You will be returned to the **Claim Line** list screen. If you need to change another Claim line, go to step 6. Otherwise, go to step 9.
- 10 If a new Claim line is required because of an unexpected activity, add the new Claim line now. Make sure that you add sufficient information in a note to explain the new Claim line or the increase in the Claim line amount. Adding a photo on the **Media** tab may be useful.
- 11 Tap twice to return to the **Jobs** list screen.
- 12 Select another Job and go to work on it.

Claim Review Tool

The Contractor uses the Claim Review Tool to review the Claim lines for Presentation. Where the Estimate lines were Accepted by the Network Owner and match the Claim lines, there is no need for review by either party.

In all other cases, the Network Owner may place the Claim lines on Hold or Reject them. The Contractor needs to review and justify the other Claim lines.

| Claim Status | Total | Estimates (Matching) | | | | Estimates (Not Matching) | | | |
|---------------------|------------------|----------------------|----------------|--------------|-----------------|----------------------------|------|--------------|----------------|
| | | No Estimates | Open | Presented | Accepted | Claimed Value | Open | Presented | Accepted |
| Open Claims | \$100,991 | \$6,267 | \$2,971 | \$295 | \$87,884 | | | \$620 | \$2,955 |
| | | | | | | | | \$310 | \$2,265 |
| | | | | | | | | \$310 | \$691 |
| Presented | \$105 | \$30 | | \$50 | \$26 | | | | |
| | | | | | | | | | |
| Accepted | \$25 | \$25 | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| Total Claims | \$101,121 | \$6,321 | \$2,971 | \$345 | \$87,909 | Claimed Value | | \$620 | \$2,955 |
| | | | | | | Estimated Value | | \$310 | \$2,265 |
| | | | | | | Over/Under Estimate | | \$310 | \$691 |

The Tool shows the totals for the Claim lines.

1

Open Claims

This figure is \$100,991 in the graphic above. It is the amount which the Contractor will want to Present to the Network Owner.

2

Open Claims with no Estimates

This figure is \$6,267 in the graphic above. It represents the Claim lines added when the Job was Completed, or which were added outside recommended practice.

The Contractor must review all these Claim lines.

- 3 Open Claims with Matching Estimates not yet Presented**

This figure is \$2,971 in the graphic above. It represents Claim lines which were added outside recommended practice.
The Contractor must review all these Claim lines.
- 4 Open Claims with Matching Estimates which Have Been Presented but not Accepted**

This figure is \$295 in the graphic above. It represents Claim lines which were added outside recommended practice.
The Contractor must review all these Claim lines.
- 5 Open Claims with Matching Estimates which Have Been Accepted**

The Contractor can Present these Claim lines without review.
- 6 Claims with Estimates which Have not Been Presented and Do not Match the Claim Lines**

This figure is \$0 in the graphic above. It represents Claim lines which were added outside recommended practice.
The Contractor must review all these Claim lines.
- 7 Claims with Estimates which Have Been Presented and Do not Match the Claim Lines**

This figure is \$620 in the graphic above. It represents Claim lines which were added outside recommended practice.
The Contractor must review all these Claim lines.
- 8 Claims with Estimates which Do not Match the Accepted Claim Lines**

This figure is \$2,955 in the graphic above. It represents Claim lines added using recommended practice but where the Estimate was not sufficient for the Job done.
The Contractor must review all these Claim lines.
- 9 Total Claims for the Programme Period**

This figure is \$101,121 in the graphic above. It represents the current maximum Claim for the Programme period.
- 10 Claims which Exceed the Estimates**

Unless the Contractor can justify these Claim lines, the Network Owner will place them on Hold or Reject them.

Contractor Claim Lines Review

If the Contractor and staff have followed recommended practice, there will be few Claim lines to review.

Where Claim lines have resulted from work done even though the Estimate lines were **Open** (not yet **Presented** to the Network Owner) or **Presented** (not yet **Accepted** by the Network Owner), there is no obligation on the Network Owner to pay these Claim lines as part of the agreed Programme of works.

The Contractor should speak to the staff responsible for these Claim lines and have them follow recommended practice in future.

Where Claim lines do not have matching Estimate lines, the Contractor needs to review the Claim lines to see why they do not match their Estimate. It is important that some justification exists, such as notes and photos. There is no obligation on the Network Owner to pay these Claim lines as part of the agreed Programme of works, unless full and reasonable notes to explain the increase are given.



Authorisation should be obtained prior to committing to increased levels of work which will result costs outside the budget of the Network Owner. This can be achieved by **Presenting** new Estimates with new costs for acceptance.

Reviewing and Presenting Claims

Introduction

Recommended practice is that the Contractor and Network Owner agree a Programme of works for each Programme period by a regular date such as the first of each month of the Maintenance Contract.

Then, during the Programme period, when Contractor staff **Complete** Programmed Jobs or Dispatches, the Estimate lines in the Job or Dispatch then become Claim lines and are ready to be reviewed. The Contractor regularly reviews these Claim lines using the **RAMM Contractor** Claim Review Tool. Claim lines which pass the review process can then be **Presented** to the Network Owner.



You should open the Claim Review Tool from the **Claim Maintenance** screen as it will then display only Claim line totals from the current Claim Header.

Before you do this you need to have:

- **Completed** Dispatches and Jobs to generate Programme period Claim lines. You do this at the **Jobs** screen in **Pocket RAMM**. See **Completing a Job with Estimate Lines** (on page 69). You can also do this at the **Dispatch** maintenance screen in **RAMM Contractor**.

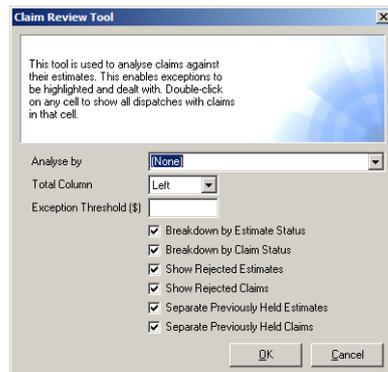
Menu Path

Follow the menu path **Actions > Claims > (select Contract) > (press OK) > Actions > Claim Review Tool** to open the Claim Review Tool dialog.

► To Review and Present Claims

To do this you follow these steps:

- 1 Select from the **Analyse by** drop-down list, the parameter by which you wish to filter the Claim line totals. If you wish to view all Claim line totals without filtering, accept the default (**None**).



- 2 The Claim line totals are on the left of the Claim Review Tool by default. This is usually the most convenient as the tool can be quite wide. It is recommended that you accept the default **Left** in the **Total Column** field.
- 3 The Estimate Review Tool highlights Estimates which differ from the Claim values. To ignore small differences, type, in the **Exception Threshold (\$)** field, the dollar value exception amount below which differences will be ignored. For instance, type **10.00** in the field for differences of \$10 or to be ignored.
- 4 You can now filter the display by Estimate status, Claim status, Rejection and Previously Held parameters. Make your selections and press **OK**.
The **Claim Review Tool** will open. If you and your staff have followed recommended practice, most Claim lines will be represented in the **Estimates (Matching) Accepted** column and require no review before Presentation. In the graphic below the total is **\$8,210.00**.

Claim Review Tool

Contract: Acme Roading 2008/9, Claim: July 2008

This tool shows all claims and their estimates (if there are any). Double-click in any cell with a dollar value and the Dispatch screen will open showing all dispatches with claims in the cell you double-clicked. At this point you can, depending on your permissions, change the status of claims and/or estimates, e.g. accept claims where estimates have already been accepted. When you exit the dispatch screen, this screen will refresh as some of the cell values may have changed depending on the actions you took in the Dispatch screen. Use the Print icon to print this report.

| Claim Status | Total | No Estimates | Estimates (Matching) | | | Estimates (Not Matching) | | |
|--------------|-------------|--------------|----------------------|------------|---------------------|--------------------------|------------|-----------|
| | | | Open | Presented | Accepted | Claimed Value | Open | Presented |
| Open Claims | \$16,497.40 | \$5,492.50 | \$120.00 | \$8,210.00 | Claimed Value | \$174.90 | \$2,500.00 | |
| Total Claims | \$16,497.40 | \$5,492.50 | \$120.00 | \$8,210.00 | Estimated Value | \$145.75 | \$1,750.00 | |
| | | | | | Over/Under Estimate | \$29.15 | \$750.00 | |

Claim line totals for this Claim Header period are displayed

These Claim lines need review as they have no corresponding Estimate lines

These Claim lines need review as best practice was not followed

These Claim lines may be Presented without review as best practice was followed

These Claim lines need review to discover why they do not match their corresponding Estimate lines

- Double-click in a cell where there is a Claim line total which needs review. This will open the **Dispatch** screen with the Claims which comprise the total listed. For the purposes of this procedure, the \$2,500.00 figure in the Accepted column of the Estimates (Not Matching) section is being checked.

Dispatch

Roading Dispatch - 5/14 Returned Complete

Contract: Acme Roading 2008/9 (5)

Call Type: Network Engineer Priority: One Month

External ID: Completed: 6/08/2008 4:20:00 p.m.

Assigned To: Grant Mackenzie Running Time: 5 days 6 hours

Fault: Digout AC Dayworks

General | Misc | Maint Notes | Progress | Audit | Claim Lines | Map | Multimedia

Dispatch Claim ID: 366: Claim July 2008 (1)

Item: DIGOUT

Item Number: B21

Units: m2

Quantity: 70

Rate: \$25.00

Amount: \$1,750.00

Status: Accepted

Work Compl: 6/08/2008 4:20:00 p.m. by Grant Mackenz

Est Total: \$1750.00 Claim Total: \$2920.00 This Claim (1): \$2920.00

Navigate through the Dispatches and Claim lines to find the discrepancies

Press the Line Notes tab to view the note explaining the reason for the increase in the size of the Claim over the Estimate

The size of the Digout has increased from 70 to 100 metres squared

A photo which shows the change in the Fault size has been added at the Multimedia tab

- 6 Highlight each Dispatch in turn. Use  and  to move through the Claim lines. Review the Claim lines to find those with discrepancies.
- 7 If you do not have sufficient information at this stage to justify Presenting a particular Claim line you could press Mark Claim as Pending . This identifies the Claim so that when you Present the Claim lines in bulk, this line is not Presented. Do not press  to Present any Claim lines as you are going to Present the Claim lines in bulk later.
- 8 When you have reviewed and dealt with all the Claim lines, close the **Dispatch** screen using your preferred method. You will be returned to the **Claim Review Tool** screen. The totals will refresh to reflect any changes you have made.
- 9 If you have to review more Claim lines, go to step 5. Otherwise go to step 10.
- 10 Double-click in the Open Claims total in the Accepted column of the Estimates (Matching) section.
The **Dispatch** maintenance screen will open.
- 11 Check that you really want to Present these Dispatch Claim lines.
- 12 Close the screen.
- 13 Right-click in the cell and press Present all Claims.
A **Confirmation** dialog will open asking if you really want to Present all the Claims.

| Estimates (Matching) | | | |
|----------------------|-----------|----------|---------------------|
| Open | Presented | Accepted | Claimed Value |
| | | | Estimated Value |
| | | | Over/Under Estimate |
| \$145.75 | \$120.00 | | |

- 14 Press .
The open Claim lines are Presented. The total which was in the Open Claims cell will now appear in the Presented line.
- 15 Do you want to Present more Claim lines in bulk?

| | |
|------------|---------------------|
| Yes | then go to step 16. |
| No | then go to step 18. |

- 16 Double-click in the cell with the Claim line total you wish to Present in bulk.
The **Dispatch** maintenance screen will open.
- 17 Go to step 11.
- 18 Close both **Claim Review Tool** screens.
You will be returned to the **RAMM Contractor** main screen.

Addressing Held Claims

Introduction

Recommended practice is that if the Network Owner does not want to Accept a Claim line they place it on Hold. If the Contractor wants to hold a Claim line back from Presentation they set the line to Pending. The Contractor then must address these Held and Pending Claim lines. You review the Held Claim lines, address whatever the problem was and then, take the Claim lines off Hold. You can then Present those which remain in the Programme for the period.

You can not Present Held Claim lines in bulk. If you are Presenting a Held Claim line for the second or subsequent time you must add a Line Note to explain why you are Re-presenting the Claim line.



Tip

You should open the Claim Review Tool from the **Claim Maintenance** screen as it will then display only Claim line totals from the current Claim Header.

Before you do this you need to have:

- Presented the Claim lines to the Network Owner. You do this in bulk using the Claim Review Tool. See Reviewing and Presenting Claims (on page 74).
- a copy of the contract to which to refer if necessary.

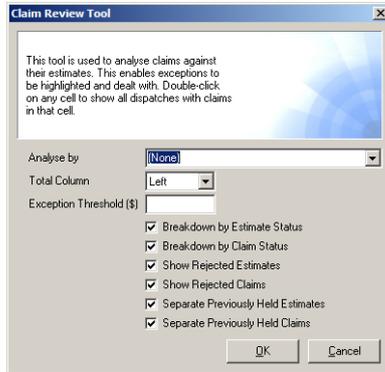
Menu Path

Follow the menu path Actions > Claims > (select Contract) > (press OK) > Actions > Claim Review Tool to open the Claim Review Tool dialog.

► To Address Held Claims

To do this you follow these steps:

- 1 Select from the **Analyse by** drop-down list, the parameter by which you wish to filter the Claim line totals. If you wish to view all Claim line totals without filtering, accept the default (**None**).

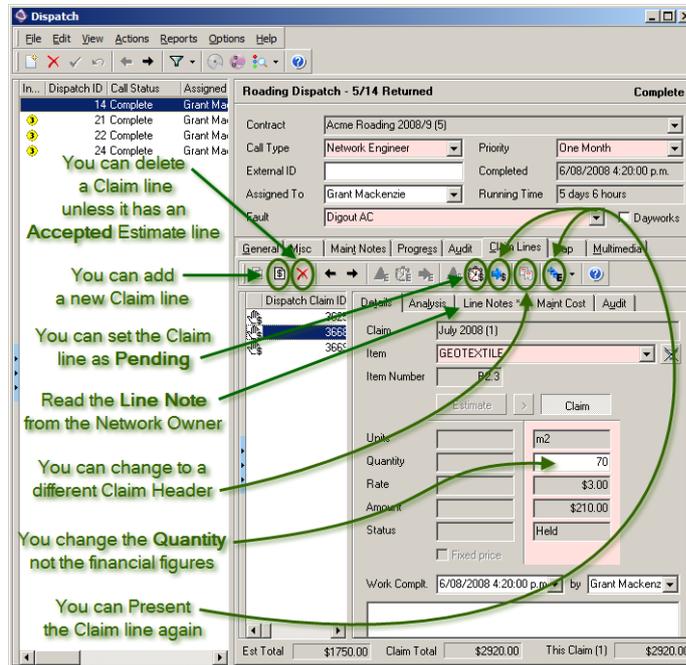


- 2 The Claim line totals are on the left of the Claim Review Tool by default. This is usually the most convenient as the tool can be quite wide. It is recommended that you accept the default **Left** in the **Total Column** field.
- 3 The Estimate Review Tool highlights Estimates which differ from the Claim values. To ignore small differences, type, in the **Exception Threshold (\$)** field, the dollar value exception amount below which differences will be ignored. For instance, type **10.00** in the field for differences of \$10 or to be ignored.
- 4 You can now filter the display by Estimate status, Claim status, Rejection and Previously Held parameters. Make your selections and press **OK**. The **Claim Review Tool** will open. The Held and Pending Claim lines will have their own rows of values. There are **\$4,210.00** of Held Claim lines to address in the graphic below.

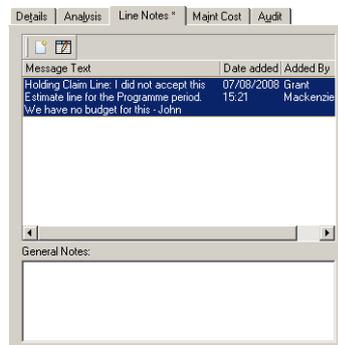
| Claim Status | Total | No Estimates | Estimates (Matching) | | | Claimed Value | Estimated Value | Over/Under Estimate |
|---------------------|--------------------|-------------------|----------------------|-----------|-------------------|---------------|-----------------|---------------------|
| | | | Open | Presented | Accepted | | | |
| Open Claims | \$145.75 | | \$145.75 | | | | | |
| Accepted | \$9,492.50 | \$1,282.50 | | | \$8,210.00 | | | |
| Held Claims | \$4,210.00 | | \$4,210.00 | | | | | |
| Total Claims | \$13,848.25 | \$5,492.50 | \$145.75 | | \$8,210.00 | | | |

Address the Held Claim lines total

- 5 Double-click in a cell where there is a **Held Claim** line total which needs review. This will open the **Dispatch** screen with the Dispatches which include the Claim lines which comprise the total listed. For the purposes of this procedure, the **\$4,210.00** figure in the **Total** column of the **Held Claims** row is being addressed.



- 6 Review the Claim lines to find those which are Held. To do this you highlight each Dispatch in turn and use ← and → to move through the Claim lines.
- 7 When you find a Held Claim line, press the Line Notes tab to view the note from the Network Owner explaining why the Claim line was placed on Hold.



- 8 Your actions now depend on the reason why the Claim line was placed on Hold. You can:
 - press  to delete the Claim line, unless there is an Accepted Estimate line
 - press  add a new Claim line to replace a deleted one
 - change the Quantity of the Claim line
 - add supporting evidence such as a photo or note

- 9 When you are satisfied that you have taken enough action for the Network Owner to Accept the Claim line, press  to Present it again
- 10 When you have reviewed and Presented all the Held Claim lines you are able to, close the **Dispatch** screen using your preferred method and you will be returned to the **Claim Review Tool** screen. The totals will refresh to reflect any changes you have made. The totals for the Held Claim lines will now be added to the totals in the Presented line.
- 11 Close both **Claim Review Tool** screens.
You will be returned to the **RAMM Contractor** main screen.

Claim Preparation

Throughout the Programme period, as Jobs and Dispatches are Completed, the resulting Claim lines are Presented by the Contractor to the Network Owner for Acceptance. The Network Owner may Accept, Hold or Reject Claim lines which are then reviewed and may be updated and Presented again by the Contractor.

This process can not go on forever or the Contractor will not be paid. The time comes when the Claim Header needs to be Prepared for Presentation to the Network Owner for payment.

You have the opportunity at this stage to add Lump Sums to the Claim Header. These are fixed amount items for works such as Patrols or Pothole Repairs which are performed on a regular basis. So they are often monthly charges. When a Contractor creates, Prepares or Presents a Claim Header, there is the option to create Lump Sum Claim lines for the Claim Period if this has not already been done. When you set up your Schedule Items, you may define them as Lump Sum items.

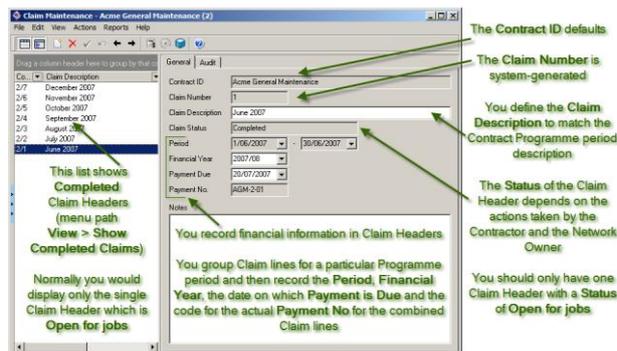
Add a Claim Header

You need to have at least one Claim Header open at all times. So before you Close Off the Claim to prepare it, you need to add a Claim Header for the next Programme period.

Claim Maintenance Screen

A Claim Header is a **RAMM Contractor** item used to group Claim lines for a fixed period within a Maintenance Contract. A Contractor uses the Claim Header to Claim payment from a Network Owner for work done in a defined Programme period. A Claim Header must exist for Claim lines to be entered during the Dispatch or Job Completion process.

You add and maintain Claim Headers at the **Claim Maintenance** screen. You Prepare, Present, Accept and Complete Claim Headers at this screen. You also transfer Maintenance Cost information to **RAMM** and generate Lump Sum Claim lines. You can also access a number of reports which are already filtered for the Claim Header you have highlighted.



Contract ID

This is the Description of the Contract with which the Claim Header is associated. If you have access to only one Contract this value will default. If you have access to more than one Contract the **Claims** dialog opens for you to select the Contract with which you want the Claim Header associated.

Claim Number and Description

The Claim Header Number is generated by **RAMM Contractor** and is the next available sequential integer.

You define the Claim Header Description. You define it to match the Contract Programme period description.

Claim Status

The Status of the Claim Header depends on the actions taken by the Contractor and the Network Owner. The statuses are:

- **Open for jobs**
If this is the only Contract Claim Header open then when any user completes a Contract Dispatch, it will be automatically assigned to this Claim Header. If there is more than one Claim Header open, the user will have to choose which Claim Header with which to associate the Dispatch before they can complete it.

- **Preparing for claiming**
No further Dispatches can be associated with this Claim Header. This is the status for a Claim Header when a Contract Manager has followed the menu path **Actions > Prepare Claim**. The Contract Manager places the Claim Header in this state in order to prepare it for presentation to the Network Owner.
- **Presented to the client**
No further Dispatches can be associated with this Claim Header. This is the status for a Claim Header when a Contract Manager has followed the menu path **Actions > Present Claim**. The Contract Manager places the Claim Header in this state in order to present it to the Network Owner. The Contract Manager performs this action only when the Claim Header has no associated Claim lines which do not have a status of **Presented**.
- **Completed**
No further Dispatches can be associated with this Claim Header. This is the status for a Claim Header when a Contract Manager has followed the menu path **Actions > Complete Claim**. The Contract Manager performs this action only when the Network Owner has paid the Claim in full.

Claim Period and Financial Year

The Claim Period is as defined in the Contract. The Financial Year is the Financial Year of the Contractor.

Claim Payment Due Date and Number

The Payment Due date can be selected from the drop-down calendar. It is for information only and does not serve any other purpose.

The Payment No. field is for the actual Payment Number for the payment from the Network Owner. The Claim Header should not be completed until the Claim has been paid in full and this value is available.

Adding a Claim Header

Introduction

You create a Claim Header to group Claim lines for a fixed period within a Maintenance Contract so that you can Claim payment from a Network Owner for work done in that Programme period.

When the Contractor staff finish a Job or Dispatch they will change the status to **Complete**. At this stage the Estimate lines in the Dispatch or Job become Claim lines. An open Claim Header must exist into which the Claim lines will be entered during the Dispatch completion process.

Recommended practice is that you have only one Claim Header open at any one time. If you have more than one Claim Header open, the user completing the Dispatch or Job must select the Claim Header for the Claim lines. They could choose the incorrect option.

So you should only add a Claim Header if one does not exist or if you are about to change the status of the one existing open Claim Header from **Open for jobs** to **Preparing for Claiming**. Any newly completed Dispatches will then default into the new open Claim Header.

Before you do this you need to have:

- a copy of the contract to which to refer if necessary.

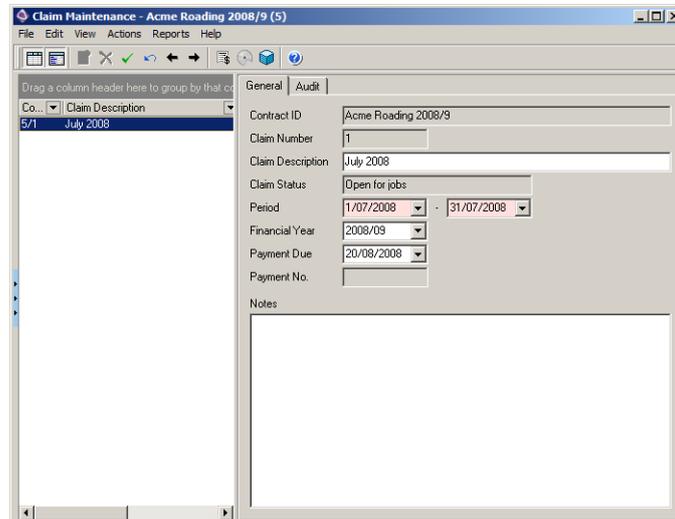
Menu Path

Follow the menu path **Actions > Claims** or press  to open the **Claim Maintenance** screen. If you have access to more than one Contract the **Claims** dialog will open and you select the Contract for the Claim Header.

▶ To Add a Claim Header

To do this you follow these steps:

- 1 Press  or CTRL+N.
The fields in the right hand panel will become available.
- 2 Type the name of the Claim Header in the **Claim Description** field. Normally this would be the Programme period and year of the Claim.
- 3 Select two dates from the two **Period** drop-down calendars. Normally these dates would be the first and last days of the Programme period to which the Claim Header relates.
- 4 Select the Claim Header financial year from the **Financial Year** drop-down list.
- 5 Select the date on which payment from the Network Owner is due. This is for your information only and serves no functional purpose in **RAMM Contractor**.
- 6 Press  to save the Claim Header.



- 7 Recommended practice is not to have more than one Claim Header Open for jobs at any one time. If you want to add another Claim Header then go to step 1. If not, close the screen in the normal fashion.

Preparing the Claim

Introduction

Towards the end of the Programme period, the Contractor needs to Close Off the Claim Header and ready it for Presentation. This is called Preparing the Claim.

Before you do this you need to have:

- a Claim Header with the status **Open for jobs**.
- **Presented** Claim lines to the Network Owner which have then been **Accepted** by the Network Owner. You do this using the Claim Review Tool. See **Reviewing and Presenting Claims** (on page 74).
- addressed the **Held** Claim lines. You do this using the Claim Review Tool. See **Addressing Held Claims** (on page 78).
- added a Claim Header for the following Programme period so that the Claim lines from newly **Completed** Jobs can be associated with it. You do this at the **Claim Maintenance** screen. See **Adding a Claim Header** (on page 83).

Menu Path

Follow the menu path **Actions > Claims** or press  to open the **Claim Maintenance** screen.

► To Prepare the Claim

To do this you follow these steps:

- 1 Select the Claim Header to highlight it. In the graphic below it is the July 2008 Claim Header.

| Co... | Claim Description |
|-------|-------------------|
| 5/2 | August 2008 |
| 5/1 | July 2008 |

General | Audit

Contract ID: Acme Roading 2008/9

Claim Number: 1

Claim Description: July 2008

Claim Status: Open for jobs

Period: 1/07/2008 - 31/08/2008

Financial Year: 2008/09

Payment Due: 20/08/2008

Payment No.:

Notes:

- 2 Follow the menu path **Actions > Prepare Claim**.
A **Confirmation** dialog will open advising that the Claim Header status will be **Preparing**.
- 3 Press **OK**.
The dialog will close. The **Lump Sum** screen will open. There will be a list of CSIs which were defined as **Lump Sum** when the CSIs were created.

If you wish to generate lump sum claim lines for this claim header now, please select them below, specify values for fields on the lump sum dispatch, and click OK; or alternatively click Skip to skip this process.

| Item Description | Item No. | Quantity |
|--|----------|----------|
| <input checked="" type="checkbox"/> INSPECTIONS (Cyclic) (Minimum Rate = \$2500.00) | A1 | 1 |
| <input checked="" type="checkbox"/> PROGRAMMING (Cyclic) (Minimum Rate = \$2000.00) | A2 | 1 |
| <input checked="" type="checkbox"/> REPORTS (Cyclic) (Minimum Rate = \$2500.00) | A3 | 1 |
| <input checked="" type="checkbox"/> QUALITY ASSURANCE (Cyclic) (Minimum Rate = \$200.00) | A4 | 1 |
| <input checked="" type="checkbox"/> CONTRACT MEETINGS (Cyclic) (Minimum Rate = \$500.00) | A5 | 1 |
| <input checked="" type="checkbox"/> RAMM UPDATES (Cyclic) (Minimum Rate = \$500.00) | A6 | 1 |
| <input checked="" type="checkbox"/> ENQUIRIES (Cyclic) (Minimum Rate = \$1000.00) | A7 | 1 |
| <input checked="" type="checkbox"/> HEALTH & SAFETY (Cyclic) (Minimum Rate = \$1000.00) | A8 | 1 |
| <input checked="" type="checkbox"/> TEMPORARY TRAFFIC MANAGEMENT (Cyclic) (Minimum Rate = \$1000.00) | A9 | 1 |
| <input checked="" type="checkbox"/> SEALED ROADS POTHOLES (Cyclic) (Minimum Rate = \$15.00) | B1 | 1 |
| <input checked="" type="checkbox"/> CHANNEL SWEEPING (Cyclic) (Minimum Rate = \$15.00) | C1 | 1 |

Mark claim lines as Presented

Asset Type: Roading

Priority: Cyclic Maintenance

Call Type:

Report Time:

OK Skip

4 Will you generate a Dispatch with Lump Sum Claim lines for this Claim Header?

| | |
|------------|---------------------|
| Yes | then go to step 5. |
| No | then go to step 10. |

- 5 Select the CSIs for which you want to generate Claim lines to be associated with this Claim Header.
- 6 Select the **Asset Type**, **Priority** and **Call Type** values for the Dispatch which will contain the Claim lines.
- 7 If you have created a Contract Dispatch Group, you will have the option to choose a value for this. In the example above, you would do this at the **Report Time** field.
- 8 Press .
The **Lump Sum** screen will close. A Dispatch containing the Claim lines you selected will be created and associated with the Claim Header. You will be returned to the **Claim Maintenance** screen where the value in the **Claim Status** field will be **Preparing for claiming**. No new Claim lines may now be added to the Claim Header.
- 9 Go to step 12.
- 10 Press .
The **Lump Sum** screen will close. You will be returned to the **Claim Maintenance** screen where the value in the **Claim Status** field will be **Preparing for claiming**. No new Claim lines may now be added to the Claim Header.
- 11 Follow the menu path **Actions > Claim Review Tool**.
The Claim Review Tool will open.
- 12 Perform a final Claim line review. See **Reviewing and Presenting Claims** (on page 74). Next you will address the disputed Claim lines so that the Claim Header will contain only those Claim lines which you believe the Network Owner will Accept for payment. See **Addressing Disputed Claim Lines** (on page 87).
- 13 Close the **Claim Maintenance** screen.
You will be returned to the **RAMM Contractor** main screen.

Addressing Disputed Claim Lines

Introduction

A Contractor Presents the Claim Header to the Network Owner for payment of the Claim. If there are disputed items in the Claim Header, the Network Owner is not usually under any obligation to pay until the disputes are resolved.

So recommended practice is to remove disputed Claim lines from the Claim Header and place them in another one. The Network Owner should then be able to Accept the Claim and not use the Hold and Reject options.

Before you do this you need to have:

- added a Claim Header for the following Programme period so that the Held Claim lines can be associated with it. You do this at the **Claim Maintenance** screen. See Adding a Claim Header (on page 83).
- prepared the Claim Header which you are going to **Present**. You do this at the **Claim Maintenance** screen. See Preparing the Claim (on page 85).
- a copy of the contract to which to refer if necessary

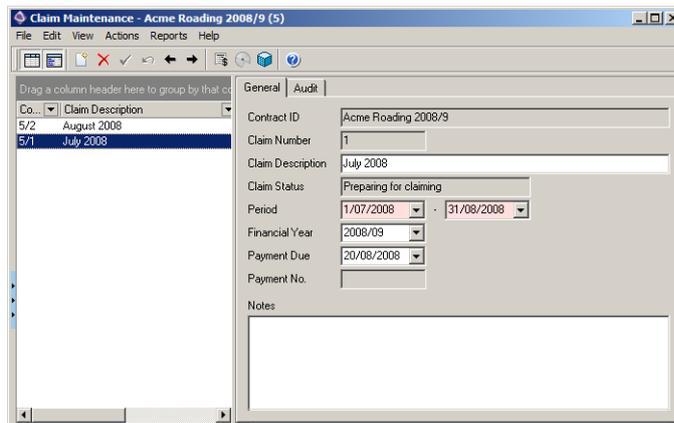
Menu Path

Follow the menu path Actions > Claims or press  to open the **Claim Maintenance** screen.

► To Address Disputed Claim Lines

To do this you follow these steps:

- 1 Select the Claim Header which you want to **Present**.

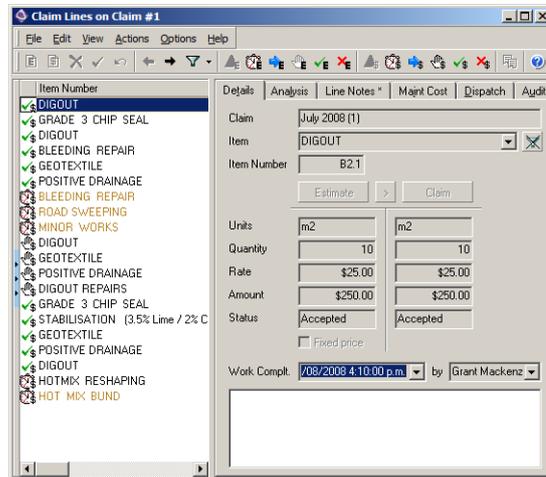


| Co. | Claim Description |
|-----|-------------------|
| 5/2 | August 2008 |
| 5/1 | July 2008 |

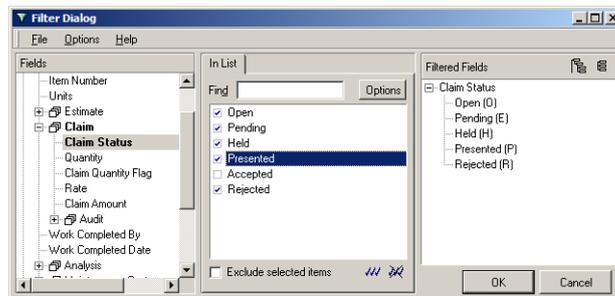
General | Audit

Contract ID: Acme Flooding 2008/9
Claim Number: 1
Claim Description: July 2008
Claim Status: Preparing for claiming
Period: 1/07/2008 - 31/08/2008
Financial Year: 2008/09
Payment Due: 20/08/2008
Payment No.:
Notes:

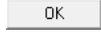
- 2 Press  or follow the menu path View > Claim Lines to open the **Claim Lines** list screen.



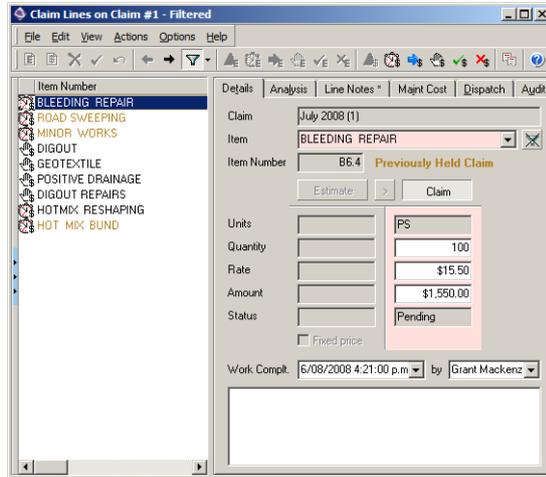
3 Press  to open the **Filter Dialog**.



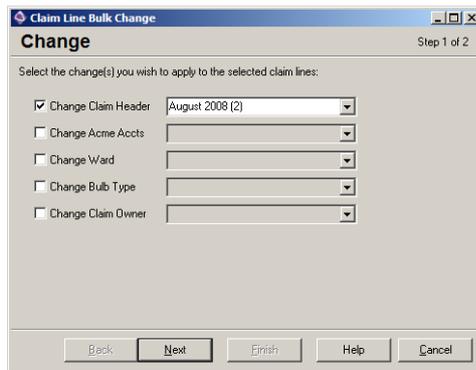
4 Under Claim Status select Open, Pending, Held, Presented and Rejected.

5 Press .

The **Filter Dialog will close** and you will be returned to the **Claim Lines** list screen. All the Claim lines except the Accepted Claim lines will be listed.



- 6 Follow the menu path **Actions > Bulk Change**.
The **Claim Line Bulk Change** screen will open at the **Change** panel.



- 7 Select the **Change Claim Header** check box.
The adjacent drop-down list will become available.
- 8 Select the Claim Header for next Programme period. In the graphic above this is **August 2008**.
- 9 Press **Next**.
- The **Claim Line Bulk Change** screen will open at the **Summary** panel. There will be a description of the changes you are about to make.
- 10 Are these the changes you want to make?

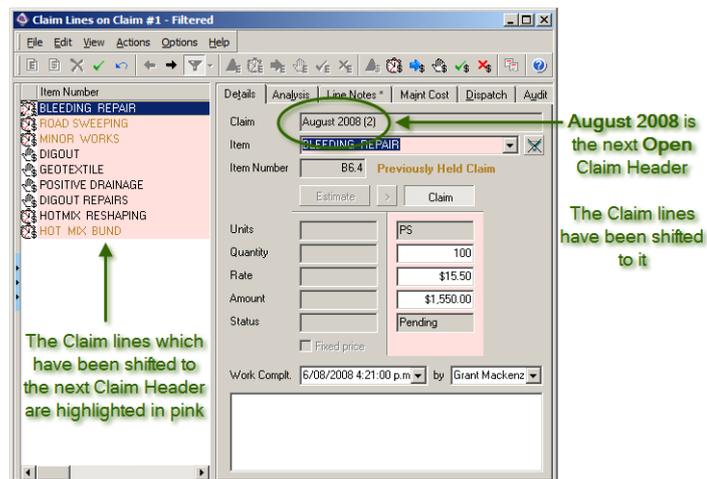
| | |
|------------|---------------------|
| Yes | then go to step 13. |
| No | then go to step 11. |

- 11 Press **Back**.
You will be returned to the **Change** panel.

12 Go to step 3 and correct the errors.

13 Press **Finish**.

The **Claim Line Bulk Change** screen will close and you will be returned to the Claim Lines list screen. The Claim lines will have been moved into the next Claim Header.



14 Press **✓**.

Your changes are saved.

15 Close the **Claim Lines** screen.

You will be returned to the **RAMM Contractor** main screen.

Presenting the Claim

Introduction

Once you have Prepared your Claim Header so that there are only Claim lines which the Network Owner has agreed to pay, and the Rejected Claim lines which remain and can be ignored, you can Present the Claim Header.

Before you do this you need to have:

- added a Claim Header for the following Claim period so that the Claim lines from newly Completed Jobs can be associated with it. You do this at the **Claim Maintenance** screen. See Adding a Claim Header (on page 83).
- addressed the disputed Claim lines. You do this at the **Claim Lines** list screen. See Addressing Disputed Claim Lines (on page 87).

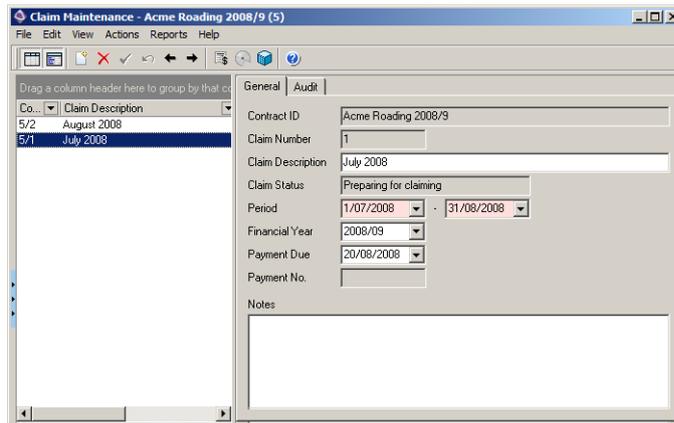
Menu Path

Follow the menu path **Actions > Claims** or press **\$** to open the **Claim Maintenance** screen.

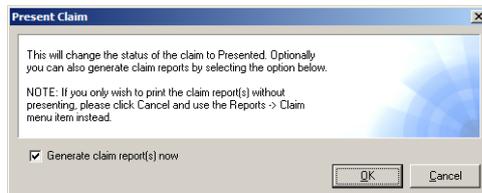
► To Present the Claim

To do this you follow these steps:

- 1 Select the Claim Header to highlight it. In the graphic below it is the July 2008 Claim Header.



- 2 Follow the menu path **Actions > Present Claim**. A **Confirmation** dialog will open advising you that the status of the Claim Header will be changed to **Presented**.



- 3 Select the **Generate Claim report(s) now** option so that the **Generate Analysis Codes** and **Generate Claim Details** reports will be available to you.
- 4 Press .

The dialog will close and if you have not previously Presented your Lump Sum Claim lines for the Claim period, the **Lump Sum** screen will open. If you have previously Presented your Lump Sum Claim lines, go to step 12. Otherwise, there will be a list of Contract Schedule Items which were defined as Lump Sum at the **Item Type** drop-down list on the **General** tab of the **Contract Schedule Items** maintenance screen when the CSIs were created.

If you wish to generate lump sum claim lines for this claim header now, please select them below, specify values for fields on the lump sum dispatch, and click OK, or alternatively click Skip to skip this process.

| Item Description | Item No. | Quantity |
|--|----------|----------|
| <input checked="" type="checkbox"/> INSPECTIONS (Cyclic) (Minimum Rate = \$2500.00) | A1 | 1 |
| <input checked="" type="checkbox"/> PROGRAMMING (Cyclic) (Minimum Rate = \$2000.00) | A2 | 1 |
| <input checked="" type="checkbox"/> REPORTS (Cyclic) (Minimum Rate = \$2500.00) | A3 | 1 |
| <input checked="" type="checkbox"/> QUALITY ASSURANCE (Cyclic) (Minimum Rate = \$200) | A4 | 1 |
| <input checked="" type="checkbox"/> CONTRACT MEETINGS (Cyclic) (Minimum Rate = \$50) | A5 | 1 |
| <input checked="" type="checkbox"/> RAMM UPDATES (Cyclic) (Minimum Rate = \$500.00) | A6 | 1 |
| <input checked="" type="checkbox"/> ENQUIRIES (Cyclic) (Minimum Rate = \$1000.00) | A7 | 1 |
| <input checked="" type="checkbox"/> HEALTH & SAFETY (Cyclic) (Minimum Rate = \$1000.00) | A8 | 1 |
| <input checked="" type="checkbox"/> TEMPORARY TRAFFIC MANAGEMENT (Cyclic) (Minimum Rate = \$1000.00) | A9 | 1 |
| <input checked="" type="checkbox"/> SEALED ROADS POTHOLES (Cyclic) (Minimum Rate = \$15.00) | B1 | 1 |
| <input checked="" type="checkbox"/> CHANNEL SWEEPING (Cyclic) (Minimum Rate = \$15.00) | C1 | 1 |

Mark claim lines as Presented

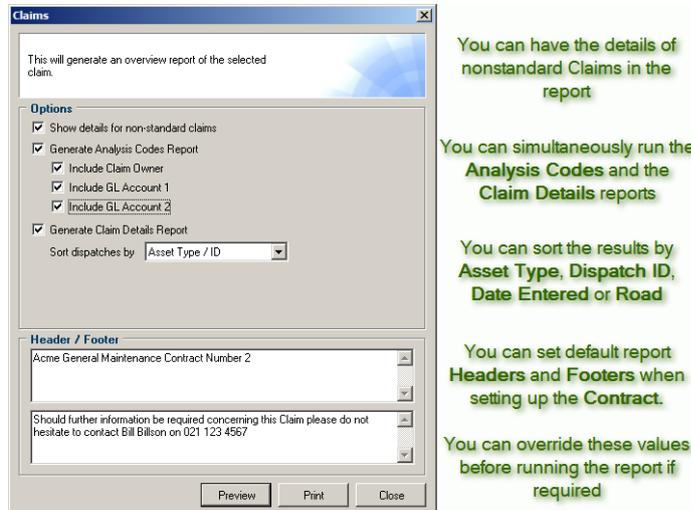
Asset Type: Flooding
Priority: Cyclic Maintenance
Call Type:
Report Time:

OK Skip

- 5 Do you want to generate a Dispatch with Lump Sum Claim lines for this Claim Header?

| | |
|------------|---------------------|
| Yes | then go to step 6. |
| No | then go to step 11. |

- 6 Select the CSIs for which you want to generate Claim lines to be associated with this Claim Header.
- 7 Select the **Asset Type**, **Priority** and **Call Type** values for the Dispatch which will contain the Claim lines.
- 8 If you have created a Contract Dispatch Group, you will have the option to choose a value for this Group. In the example above, The Dispatch Group has been named **Report Time** which gives its name to the **Report Time** field. Your field would be named after your Dispatch Group.
- 9 Press .
The **Lump Sum** screen will close. A Dispatch containing the Claim lines you selected will be created and associated with the Claim Header. The **Claims** report screen will open.
- 10 Go to step 12.
- 11 Press .
The **Lump Sum** screen will close. The **Claims** report selection screen will open.

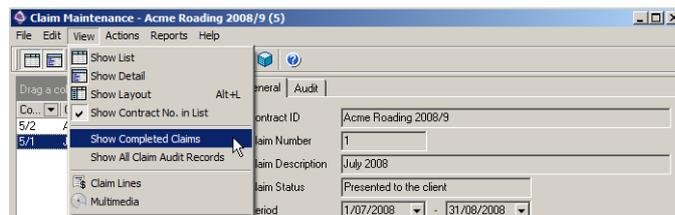


- 12 Select your options and press , or both depending on your requirements. The reports which you have selected will display, print or both.
- 13 Deal with the reports.
You will be returned to the **Claim Maintenance** screen. The status of the Claim Header will now be **Presented to the client**.
- 14 Close the **Claim Maintenance** screen
You will be returned to the **RAMM Contractor** main screen.

Claim Completion

Closing off the Claim Header is called Completing the Claim.

This prevents anyone from changing the status or amount of its Claim lines. So until payment has been made in full, the Claim Header should not be **Completed**. When the Claim Header has been **Completed**, it will no longer appear at the **Claim Maintenance** screen unless you have selected the Show Completed Claims menu option under **View**.



Maintenance Costs

Before you Complete the Claim, you must ensure that all the Claim lines, for which Maintenance Cost values are required, have the Maintenance Cost information. If you Complete the Claim prior to populating the Maintenance Cost fields it is very difficult to do this afterwards.

Completing the Claim

Introduction

When the Claim has been completely Accepted by the Network Owner, it should be paid as per the contract provisions. Once it has been paid in full, the Contractor should Complete the Claim Header. This closes it off.

Before you do this you need to have:

- Presented the Claim Header to the Network Owner. You do this at the **Claim Maintenance** screen. See Presenting the Claim (on page 91).
- been paid in full by the Network Owner.

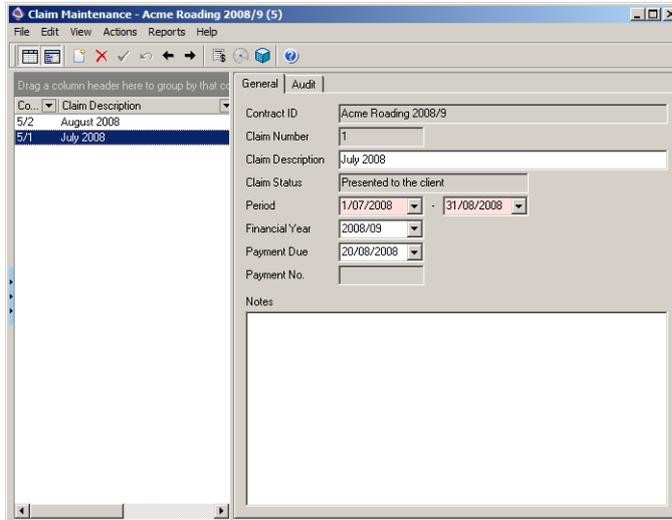
Menu Path

Follow the menu path Actions > Claims or press  to open the **Claim Maintenance** screen.

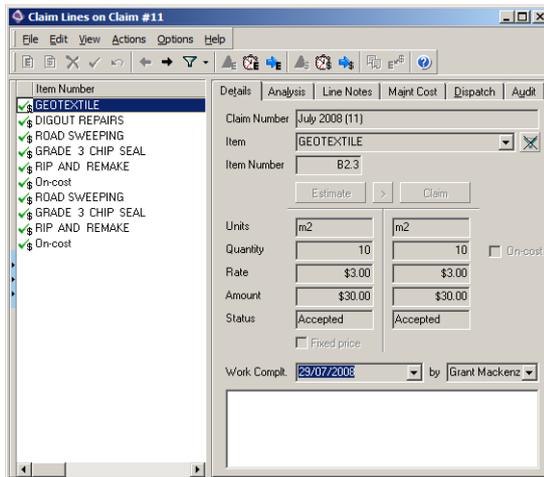
► To Complete the Claim

To do this you follow these steps:

- 1 Select the Claim Header. In the graphic below it is the July 2008 Claim Header.



- 2 Press . The **Claim Lines on Claim #** screen will open.



- 3 Follow the menu path Filter > Maintenance Cost Required.



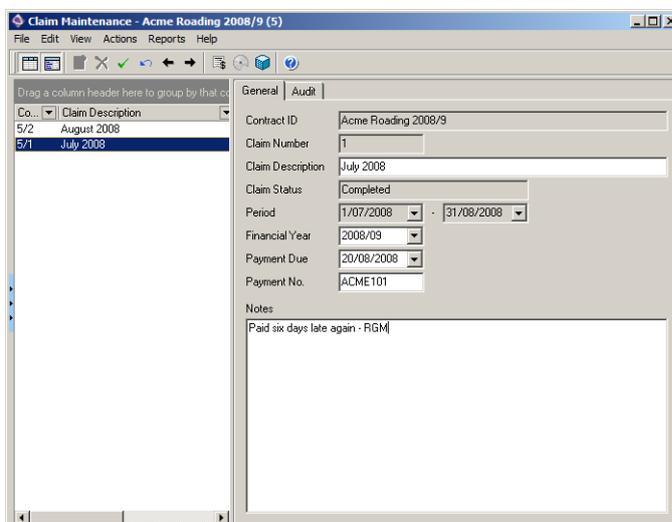
An **Information** screen will open telling you that all the Claim lines where the Maintenance Costs are Required but not present will be listed.



- 4 Press .
The **Information** screen will close and you will be returned to the **Claim Lines on Claim #** screen. Only Claim lines which require Maintenance Cost values will be listed.
- 5 Press the **Maint Cost** tab.
- 6 Complete the empty fields for each Claim line in turn.
- 7 Close the screen in the normal manner.
You will be returned to the **Claim Maintenance** screen.
- 8 Follow the menu path **Actions > Complete Claim**. A **Confirmation** dialog will open warning you of the consequences of permanently closing the Claim.



- 9 Press .
The dialog will close and you will be returned to the **Claim Maintenance** screen.
- 10 The **Payment No.** field will now be available. Type the payment code in the field.
- 11 Type any relevant information in the **Notes** field.



- 12 Press  to save your changes.
The Claim Header will disappear from the list unless you have selected the Show Completed Claims menu option under View.
- 13 Close the **Claim Maintenance** screen.
You will be returned to the **RAMM Contractor** main screen.

Claim Maintenance Cost Information

Once the Network Owner has approved the Claim and formally Accepted it, you will Complete the Claim and transfer the Claim lines to the **RAMM** Maintenance Cost system.

Transferring Maintenance Costs is done to fulfil specific reporting and analysis requirements of the Network Owner and is possible only for Claims that have been Presented and are Complete. You would do this only for Claims containing CSIs that have been set up for such a transfer in the **RAMM Contractor Schedule Items** screen.

Sending Claim Information to RAMM Maintenance Costs

Introduction

When the Claim has been paid in full and Completed, the Contractor should transfer the Claim Maintenance Cost information to the **RAMM** database.

Before you do this you need to have:

- been paid in full by the Network Owner
- Completed the Claim Header. You do this at the **Claim Maintenance** screen. See **Completing the Claim** (on page 95).
- selected the **Show Completed Claims** menu option under **View** or the **Completed Claim Header** will not appear in the list.

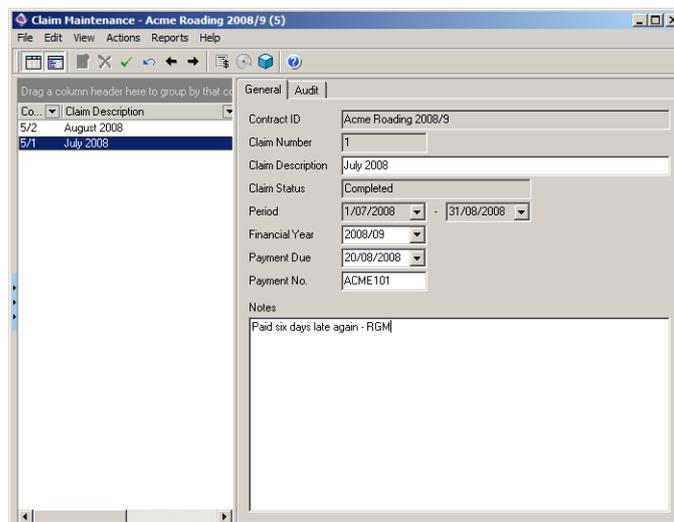
Menu Path

Follow the menu path **Actions > Claims** or press  to open the **Claim Maintenance** screen.

► To Send Claim Information to RAMM Maintenance Costs

To do this you follow these steps:

- 1 Select the Claim Header. In the graphic below it is October 2007.



- 2 Follow the menu path **Actions > Transfer to RAMM Maintenance Cost**. A **Confirmation** dialog will open asking if you really want to transfer the Claim information to **RAMM**.
 - 3 Press .
- The dialog will close and you will be returned to the **Claim Maintenance** screen.
- 4 Close the **Claim Maintenance** screen.
You will be returned to the **RAMM Contractor** main screen.

Network Owners and Maintenance Programmes

A Network Owner needs certainty that they are going to have an agreed amount of Programmed work performed each Programme period, that the total of work done will be within budget and that it will be done at an agreed price as per their contract with the Contractor. Following the practices outlined in this *RAMM Contractor Best Practice* guide will assist both parties to achieve these goals.



This section is for the Network Owner and staff. If you are a Contractor, you should skip this section and go to your section above. See *Contractors and Maintenance Programmes* (on page 35).

In This Chapter

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| Maintenance Programme Process for Network Owners..... | 101 |
| Estimate Review Best Practice | 102 |
| Claim Review Best Practice | 118 |

Maintenance Programme Process for Network Owners

It is recommended that the Network Owner take the following steps each Programme period. Following these steps should promote efficiency, accuracy and certainty in the working relationship with the Contractor.

- 1 The Network Owner, on an agreed date during the Programme period, uses the Estimate Review Tool to check the proposed Programme of works from the Contractor. Estimate lines and totals are checked to be sure that they are within budget and within the agreed contract parameters. See *Reviewing Estimate line Totals* (on page 107).

- 2 The Network Owner, on an agreed date during the Programme period, uses the Estimate Review Tool to Accept, Hold or Reject the Estimate lines for the following month sent through by the Contractor. See *Reviewing Individual Estimate Lines* (on page 111).
- 3 The Network Owner uses the Estimate Review Tool at regular intervals during the Programme period, to Accept, Hold or Reject the revised Estimates sent through by the Contractor. See *Reviewing Held Estimate Lines when Presented Again* (on page 115).
- 4 The Network Owner, at regular intervals throughout the Programme period, uses the Claim Review Tool to Accept, Hold or Reject the **Presented** Claim lines. All Claim lines which have not changed from **Accepted** Estimates can be Accepted without review. All other Claim lines will require review. See *Reviewing Claim Lines* (on page 122).
- 5 The Network Owner uses the Claim Review Tool throughout the month, to review the revised and **Presented** Claim lines and to Accept, Hold or Reject them. See *Reviewing Held Claim Lines when Presented Again* (on page 126).
- 6 The Network Owner uses the Claim Review Tool to review the Claim lines in the **Presented** Claim Header and to Accept, Hold or Reject them. See *Reviewing the Presented Claim Header* (on page 130).
- 7 The Network Owner sends the **Accepted** Claim Header to the accounts department who pay the Contractor.

Estimate Review Best Practice

It is recommended that a Network Owner dealing with Estimates reviews them each Programme period at a set time, such as on or after the 20th of the month. The Contractor should have Presented the Estimates for review by that date. The Network Owner uses the Estimate Review Tool to review the Estimate lines for the following Programme period, firstly placing on Hold the Estimate lines from Dispatches which are clearly outside the criteria for the Programme period and then reviewing the remaining Estimates line by line.

Estimate Review Tool

The Estimate Review Tool displays information such as the Programme period total and subtotals for different groups of Estimates. You can:

- instantly see the Estimated total of Programmed works for the Programme period. If this figure differs from your requirements you can then Hold Jobs to reduce the amount or ask the Contractor to Present more Estimates.
- view Estimates analysed by Asset type or view Estimates by Dispatch Fault, Priority and Status or by other parameters depending on your requirements. You can then decide quickly which Estimates fall within your plan and approve them in bulk.

For further details see *Estimate Review Tool* (on page 105) below.

Accept Hold Reject

The Network Owner can use the Estimate Review Tool to Accept, Hold or Reject the Estimates. It is suggested that you Hold or Reject each Estimate line individually but Accept Estimate lines in bulk.

Hold Reason Notes

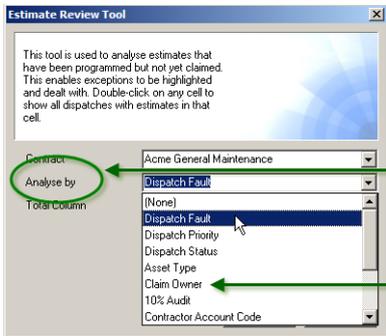
The Network Owner can add Line Notes which detail the reason why an Estimate line has been Held. They can also give the Contractor advice on how to address the Estimate line so that it can be Accepted in the next review.

Review Again

When the Network Owner opens the Estimate Review Tool they can immediately see the newly Presented Estimates. They then have the opportunity to review them between 20th and the last day of the month so that, if Accepted, the Estimates can still be included in the Maintenance Programme for the following period. The Network Owner may still not Accept some or all of the Estimates Presented again. So there may be more addressing and Presenting of the Estimates before the Programme for the following period is agreed.

Estimate Review Tool – Analysis Groups

It is recommended that on or before a regular date such as the 20th of the month, the Contractor reviews the Maintenance Pool Dispatches. The Estimate Review Tool filters and groups the Dispatches to help with the Programming decisions.



The screenshot shows the 'Estimate Review Tool' window. At the top, there is a text box explaining the tool's purpose: 'This tool is used to analyse estimates that have been programmed but not yet claimed. This enables exceptions to be highlighted and dealt with. Double-click on any cell to show all dispatches with estimates in that cell.' Below this, there are two dropdown menus. The first is labeled 'Contract' and is set to 'Acme General Maintenance'. The second is labeled 'Analyse by' and is set to 'Dispatch Fault'. A list of options is visible below the 'Analyse by' dropdown, including '(None)', 'Dispatch Fault', 'Dispatch Priority', 'Dispatch Status', 'Asset Type', 'Claim Owner', '10% Audit', and 'Contractor Account Code'. Green arrows point from the text annotations to the 'Analyse by' dropdown and the 'Dispatch Fault' option in the list.

When you open the Estimate Review Tool, you select the options to filter and present the Estimate line totals by a variety of analysis groupings

You select the Analysis option from the Analyse by drop-down list

You analyse the Estimate lines by the option which best matches your Programming requirements

Analysis Options

Every Contractor will Programme their work differently depending on their circumstances. For instance, they may make Programme choices to match staff numbers. Perhaps, the Network Owner wants to concentrate on broken kerb and channel or some other Fault for the Programme period. It may make sense to concentrate on Priority One Jobs.

The Estimate Review Tool can group Dispatches for Programming and review.

Analyse by Dispatch Fault

You would use the Estimate Review Tool to analyse Dispatches by Dispatch Fault if you need to target or focus on a particular Fault for the particular Programme period. You would do this if your priority for the Programme period were a particular Network Fault such as potholes or broken kerb and channel.

Analyse by Dispatch Priority

You would use the Estimate Review Tool to analyse your Dispatches by Dispatch Priority if you wanted to Programme the most urgent Dispatches first.

Analyse by Dispatch Status

You use the Estimate Review Tool to analyse your Dispatches by Dispatch Status to group them into Entered, Dispatched and Completed. You do this if Dispatched and Completed Dispatches are in the Maintenance Pool in error.

Analyse by Asset Type

A Contractor would use the Estimate Review Tool to analyse Dispatches by Asset Type if, for instance, they used a subcontractor to for all work related to Signs and wanted to check that there was enough work for the period.

Analyse by Claim Owner

You would use the Estimate Review Tool to analyse Dispatches by Claim Owner only in very specific circumstances. For instance, if you had a Street Lighting contract and you had to Claim from both a local authority and an electricity company depending on the work done to the Street Lights.

Analyse by Contract Dispatch Group

Contract Dispatch Groups are used to group Dispatches for analysis and reporting purposes for an individual Contract. You create them only if a standard **RAMM Contractor** function to group the Dispatches does not already exist. You would use the Estimate Review Tool to analyse your Dispatches by Dispatch Group for reasons related to the purpose of the Dispatch Group which you defined.

Analyse by Account Code

You would use the Estimate Review Tool to analyse your Dispatches by Account Codes to match Programme expenditure to budget requirements.

Analyse by Programme Header

You would use the Estimate Review Tool to analyse your Dispatches by Programme Header if you wanted to compare Programme periods.

Analyse by Programme Status

You would use the Estimate Review Tool to analyse your Dispatches by Programme Status to compare the Estimate totals by different Programme statuses.

Analyse by Programme Category

Programme Categories are a user-defined method of grouping Dispatches within a Programme. You would use the Estimate Review Tool to analyse your Dispatches by Programme Category for reasons related to the purpose of the Programme Categories which you defined. For instance, some users define Programme Categories as prioritisation codes different from the Dispatch Priority codes defined in the contract. These user-defined Programme Categories help the Contractor prioritise Programme Dispatches based on their own criteria.

Estimate Review Tool

The **RAMM Contractor** Estimate Review Tool enables a Network Owner to handle Estimate lines in bulk. All Estimates for a Programme period are available and grouped by criteria selected by the user. Once the Network Owner has reviewed the Estimates, they can, by right-clicking on the total and selecting the Accept all Estimates option, Accept in bulk all Presented Estimates which are not Open, Held or Rejected.

Maximise Efficiency

Dealing with Estimates in a coordinated fashion, prevents wastage of effort. In the graphic below you can see that the Estimate Review Tool filters and groups Estimates. It then displays the totals in a readily understandable fashion.

| Estimate Status | Total | Not Programmed | MaintenancePool | July 2008 | August 2008 | September 2008 | October 2008 | November |
|---------------------------|--------------------|-------------------|-------------------|-----------|--------------------|----------------|--------------|----------|
| Open Estimates | \$6,999.40 | \$4,269.40 | \$2,730.00 | | | | | |
| Presented | \$8,603.70 | | | | \$8,603.70 | | | |
| Held Estimates | \$1,192.75 | | | | \$1,192.75 | | | |
| Previously Held Estimates | \$2,258.70 | | | | \$2,258.70 | | | |
| Rejected Estimates | \$252.00 | \$252.00 | | | | | | |
| Total Estimates | \$19,054.55 | \$4,269.40 | \$2,730.00 | | \$12,055.15 | | | |

Open Estimates Not Programmed

You will notice in the graphic above that there are \$4,269.40 worth of Open Estimates which have not been Programmed. If the recommended practice has been followed, these Estimate lines will be from Dispatches or Jobs which are Dayworks and are not in the Maintenance Programme.

You can ignore these until you are ready to deal with Dayworks.

Open Estimates in the Maintenance Pool

There are \$2,730.00 of Open Estimates in the Maintenance Pool. These will be Programmed by the Contractor at a later date. You can ignore these until they are Programmed into the current period and Presented.

Open Estimates in the Programme Period August 2008

There are no Open Estimates in the Programme period of August 2008. Estimate lines appear in this cell after a Dispatch is Programmed for the period and before the Contractor Presents the Estimate lines. If there is a total in this cell, you can ignore it until the Estimate lines are Presented.

Presented Estimates in the Programme Period August 2008

You will notice in the graphic above that there are \$8,603.70 worth of Presented Estimates in the August 2008 Programme. You will need to review and Accept, Hold or Reject these Estimate lines.

Held Estimates in the Programme Period August 2008

You will notice in the graphic above that there are \$1,192.75 worth of Held Estimates in the August 2008 Programme. The Contractor needs to address these Estimates. The Network Owner does not need to review these until the Contractor has addressed them and Presented them again.

Previously Held Estimates in the Programme Period August 2008

You will notice in the graphic above that there are \$2,258.70 worth of Previously Held Estimates in the August 2008 Programme. You need to review these as they could have been Presented again after having been Held. They may also be Open Estimates. All you can say for sure before reviewing them is that you Held them at an earlier date. You should review the Estimate lines which have been Presented again and ignore those which are Open.

Accepted Estimates in the Programme Period August 2008

You will notice in the graphic above that there are no Accepted Estimates in the August 2008 Programme. Once you have Estimate lines in the Accepted row, they need no further attention as you have already Accepted them.

Rejected Estimates

You will notice in the graphic above that there are \$150 worth of Rejected Estimates in the Not Programmed column. The Contractor will need to deal with these records. These need no further attention by the Network Owner.

Reviewing Estimate Line Totals

Introduction

Before the commencement of the Programme period, it is recommended that the Contractor has Presented a Programme of works to the Network Owner for consideration and approval. Prior to the commencement of the Programme period, the Network Owner uses the Estimate Review Tool to decide which Dispatches to Accept for the Programme period.

It is recommended that the Network Owner to use the Estimate Review Tool to group the Estimate line totals in a manner to help them decide which Dispatches are obviously outside the criteria for inclusion in the Programme period and to deal with them first.

For instance, you may want your Contractor to concentrate on one or two particular Faults this coming period such as Potholes and Digouts. In that situation you would choose to analyse the Claim lines by Dispatch Fault and check that sufficient of these are being scheduled. You can then immediately identify those Dispatches with other Faults.

If you wanted the Contractor to concentrate on the most pressing problems only, then you would analyse the Claim lines by Dispatch Priority and place on Hold those of the lowest Priority.

Before you do this you need to have:

- set and agreed with the Contractor, your budget and priorities for the Programme period.

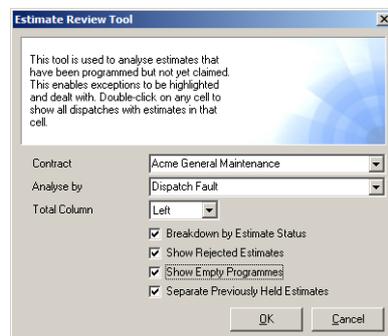
Menu Path

Follow the menu path Actions > Estimate Review Tool to open the **Estimate Review Tool** dialog.

► To Review Estimate Line Totals

To do this you follow these steps:

- 1 Select your Contract from the Contract drop-down list.



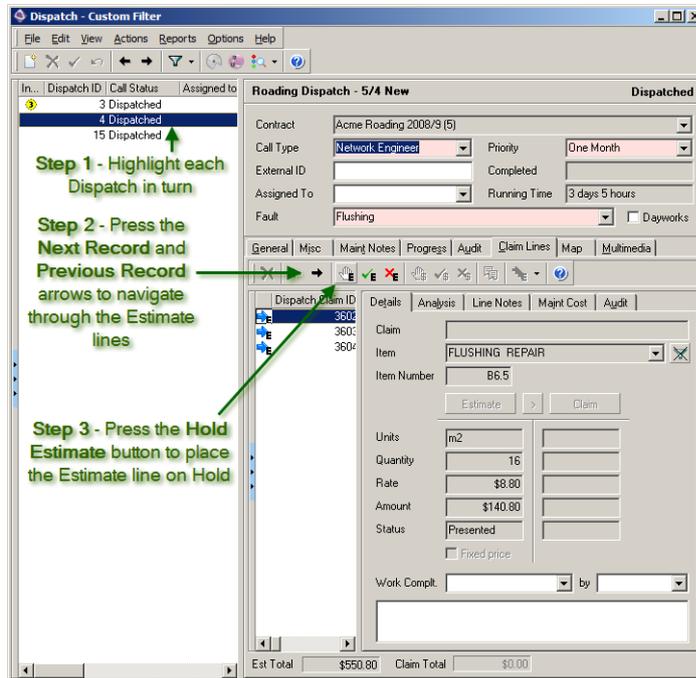
- 2 You now have the option to filter what you are going to see by analysis and Estimate parameters. For this procedure, Dispatch Fault has been selected. Make your choices and press to open the **Estimate Review Tool** screen. Typically, the Dayworks will be in the Not Programmed column, the Dispatches which are not in the Programme period will be in the Maintenance Pool and the Maintenance Programme Estimate lines waiting to be reviewed will be in the Programme period Presented cell. In the graphic below they are in July 2008. They are grouped by Dispatch Fault.

Estimate Review Tool
Contract: Acme Roading 2008/9. Analyse by: Dispatch Fault

This tool shows all estimates which have been programmed but not yet claimed (if there are any). Double-click in any cell with a dollar value and the Dispatch screen will open showing all dispatches with estimates in the cell you double-clicked. At this point you can, depending on your permissions, change the status of estimates, adjust values, etc. When you exit the dispatch screen, this screen will refresh as some of the cell values may have changed depending on the actions you took in the Dispatch screen. Use the Print icon to print this report.

| Estimate Status | Total | Not Programmed | Maintenance Pool | July 2008 | August 2008 | September 2008 | October 2008 | Nov |
|---|-------------------|----------------|------------------|-----------------|-------------------|-------------------|--------------|-----|
| Dispatch Fault: Aggregate loss - Roading (AGL) | | | | | | | | |
| Open Estimates | \$973.60 | | | \$973.60 | | | | |
| Total Estimates | \$973.60 | | | \$973.60 | | | | |
| Dispatch Fault: Bleeding - Roading (BLD) | | | | | | | | |
| Presented | \$1,000.00 | | | | | \$1,000.00 | | |
| Total Estimates | \$1,000.00 | | | | | \$1,000.00 | | |
| Dispatch Fault: Digout AC - Roading (DAC) | | | | | | | | |
| Presented | \$2,250.00 | | | | \$2,250.00 | | | |
| Total Estimates | \$2,250.00 | | | | \$2,250.00 | | | |

- 3 At this stage, your next step will depend on your own circumstances. For this procedure, it has been assumed that the monthly budget is \$10,000 and Digouts and Polished Surfaces are the priority. The total of the Estimate lines Presented for the period is over \$12,000. So more than \$2,000 of work needs to be placed on Hold. So look for a group of Estimates for Faults whose repair you do not want in the Programme for next period.
- 4 Double-click in the cell of the Presented Estimates total which you want to place on Hold. The **Dispatch** maintenance screen will open with the Dispatches listed. In the graphic below, the Network Owner has decided that the Flushing Dispatches will not be included in the Programme and so is placing them on Hold.



- Step 1 - Highlight each Dispatch in turn
- Step 2 - Press the Next Record and Previous Record arrows to navigate through the Estimate lines
- Step 3 - Press the Hold Estimate button to place the Estimate line on Hold

- 5 Select, in the (unnamed) Dispatch List panel, the Dispatch whose Estimate lines are to be placed on Hold.
- 6 Press  to place the selected Estimate line in the (unnamed) Claim Lines list panel, on Hold.
The **Holding Estimate Line** dialog will open.

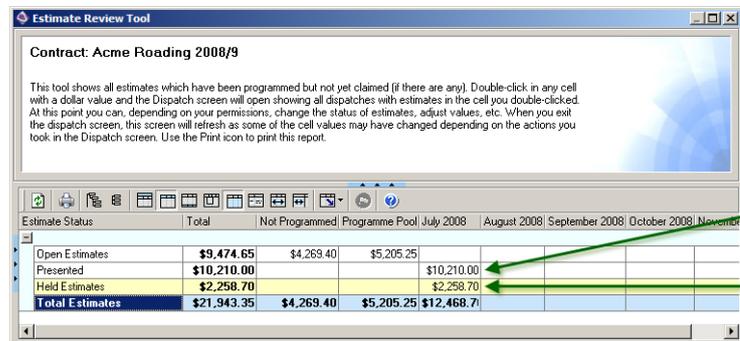


- 7 Type, in the Note field, the reason why you are placing the Estimate line on Hold and any other information useful to the Contractor.
- 8 Press .
The **Holding Estimate Line** dialog will close and you will be returned to the **Dispatch** maintenance screen.

- 9 Use  and  to move through the Estimate lines and place them all on Hold. Each time you place a line on Hold, the **Holding Estimate Line** dialog will open and the last note you made will have defaulted. You accept this or change it as appropriate and close the dialog.
- 10 Press  to save your changes.
- 11 Do you want to place on Hold, Estimate lines from another Dispatch?

| | |
|------------|---------------------|
| Yes | then go to step 5. |
| No | then go to step 12. |

- 12 Close the **Dispatch** maintenance screen using your preferred method. You will be returned to the Estimate Review Tool. The Estimate lines total for the Dispatches which you Held will change to reflect the changes you have made.



The Presented total has reduced by the amount of the Held Estimates total

| Estimate Status | Total | Not Programmed | Programme Pool | July 2008 | August 2008 | September 2008 | October 2008 | November |
|------------------------|--------------------|-------------------|-------------------|--------------------|-------------|----------------|--------------|----------|
| Open Estimates | \$9,474.65 | \$4,269.40 | \$5,205.25 | | | | | |
| Presented | \$10,210.00 | | | \$10,210.00 | | | | |
| Held Estimates | \$2,258.70 | | | | \$2,258.70 | | | |
| Total Estimates | \$21,943.35 | \$4,269.40 | \$5,205.25 | \$12,468.71 | | | | |

- 13 You now need to review the individual Estimate lines. Go to Reviewing Individual Estimate Lines (on page 111).

Reviewing Individual Estimate Lines

Introduction

It is recommended that a Network Owner dealing with Estimates reviews them each Programme period at a set time, such as on or after the 20th of the month. The Contractor should have Presented the Estimates for review by that date. The Network Owner uses the Estimate Review Tool to review the Estimate lines for the following Programme period, firstly placing on Hold the Estimate lines from Dispatches which are clearly outside the criteria for the Programme period and then reviewing the remaining Estimates line by line.

Before you do this you need to have:

- reviewed the Estimate line totals. You do this using the Estimate Review Tool. See Reviewing Estimate line Totals (on page 107).

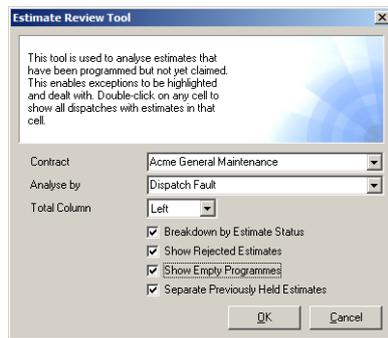
Menu Path

Follow the menu path Actions > Estimate Review Tool to open the **Estimate Review Tool** dialog.

► To Review Individual Estimate lines

To do this you follow these steps:

- 1 Select your Contract from the Contract drop-down list.

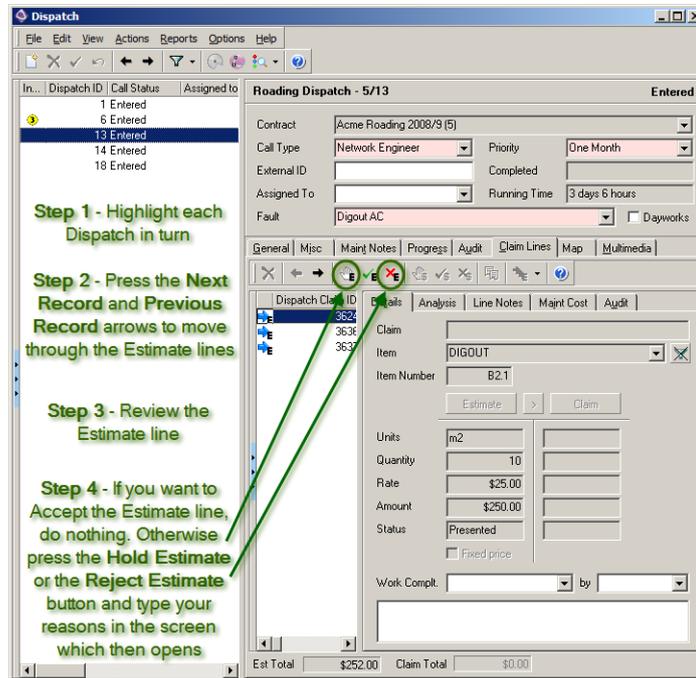


- 2 You now have the option to filter what you are going to see by analysis and Estimate parameters. For this procedure, Dispatch Fault has been selected.

Make your choices and press to open the **Estimate Review Tool** screen. Typically, the Dayworks will be in the **Not Programmed** column, the Dispatches which are not in the Programme period will be in the **Maintenance Pool** and the Maintenance Programme Estimate lines waiting to be reviewed will be in the Programme period **Presented** cell. In the graphic below they are in July 2008.

| Estimate Status | Total | Not Programmed | Maintenance Pool | July 2008 | August 2008 | September 2008 | October 2008 | November |
|------------------------|--------------------|-------------------|-------------------|--------------------|-------------|----------------|--------------|----------|
| Open Estimates | \$9,474.65 | \$4,269.40 | \$5,205.25 | | | | | |
| Presented | \$10,210.00 | | | \$10,210.00 | | | | |
| Held Estimates | \$2,258.70 | | | \$2,258.70 | | | | |
| Total Estimates | \$21,943.35 | \$4,269.40 | \$5,205.25 | \$12,468.71 | | | | |

- 3 Double-click on the **Presented** Estimates in the Programme period column. In the graphic above, this is the July 2008 column. This will open the **Dispatch** screen with the **Presented** Dispatches listed.



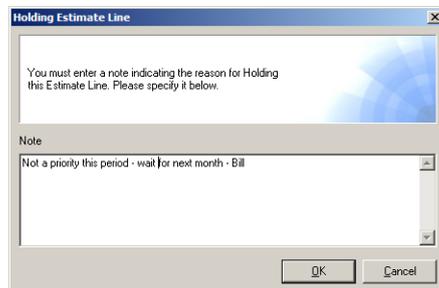
Step 1 - Highlight each Dispatch in turn

Step 2 - Press the Next Record and Previous Record arrows to move through the Estimate lines

Step 3 - Review the Estimate line

Step 4 - If you want to Accept the Estimate line, do nothing. Otherwise press the Hold Estimate or the Reject Estimate button and type your reasons in the screen which then opens

- Review the Estimate lines. To do this you highlight each Dispatch in turn and use and to move through the Estimate lines. Do not press to Accept the legitimate Estimate lines as you are going to save time and Accept them all in bulk later.
- To place a selected Estimate line on Hold press . To Reject a selected Estimate line press . The **Holding Estimate Line** dialog will open.



- Type the reason for Holding the Estimate in the **Note** field.
- Press . The **Holding Estimate Line** dialog will close and you will be returned to the **Dispatch** maintenance screen.

- 8 When you have reviewed all the Estimate lines and Held or Rejected the ones you do not want to Accept, close the **Dispatch** screen using your preferred method and you will be returned to the **Estimate Review Tool** screen. The total of the Estimate lines which you Held or Rejected will be in the Held Estimates and Rejected Estimates lines respectively. The total in the Presented cell will have reduced by those amounts.

Estimate Review Tool
Contract: Acme Roading 2008/9

This tool shows all estimates which have been programmed but not yet claimed (if there are any). Double-click in any cell with a dollar value and the Dispatch screen will open showing all dispatches with estimates in the cell you double-clicked. At this point you can, depending on your permissions, change the status of estimates, adjust values, etc. When you exit the dispatch screen, this screen will refresh as some of the cell values may have changed depending on the actions you took in the Dispatch screen. Use the Print icon to print this report.

⚠ There are rejected Estimates in this report

| Estimate Status | Total | Not Programmed | Maintenance Pool | July 2008 | August 2008 | September 2008 | October 2008 | November 2008 |
|------------------------|--------------------|-------------------|-------------------|--------------------|-------------|----------------|--------------|---------------|
| Open Estimates | \$9,474.65 | \$4,269.40 | \$5,205.25 | | | | | |
| Presented | \$9,710.00 | | | \$9,710.00 | | | | |
| Held Estimates | \$2,508.70 | | | | | \$2,508.70 | | |
| Rejected Estimates | \$252.00 | | | | | \$252.00 | | |
| Total Estimates | \$21,693.35 | \$4,269.40 | \$5,205.25 | \$12,218.70 | | | | |

- 9 Highlight the Presented total in the Programme period, right-click and select **Accept all Estimates...** A **Confirmation** dialog will open asking if you really want to Accept all the Estimates.

| Estimate Status | Total | Not Programmed | Maintenance Pool | July 2008 | August 2008 | September 2008 | October 2008 | November 2008 |
|------------------------|--------------------|-------------------|-------------------|--------------------|-------------|----------------|--------------|---------------|
| Open Estimates | \$9,474.65 | \$4,269.40 | \$5,205.25 | | | | | |
| Presented | \$9,710.00 | | | \$9,710.00 | | | | |
| Held Estimates | \$2,508.70 | | | | | \$2,508.70 | | |
| Rejected Estimates | \$252.00 | | | | | \$252.00 | | |
| Total Estimates | \$21,693.35 | \$4,269.40 | \$5,205.25 | \$12,218.70 | | | | |

- 10 Press to Accept in bulk, the Presented Estimate lines which have not been Rejected or Held. The total which was in the Presented line of the Programme period column will now appear in the Accepted line in the Programme period which you have chosen.

| Estimate Status | Total | Not Programmed | Maintenance Pool | July 2008 | August 2008 | September 2008 | October 2008 | November 2008 |
|------------------------|--------------------|-------------------|-------------------|--------------------|-------------|----------------|--------------|---------------|
| Open Estimates | \$9,474.65 | \$4,269.40 | \$5,205.25 | | | | | |
| Accepted | \$9,710.00 | | | \$9,710.00 | | | | |
| Held Estimates | \$2,508.70 | | | | | \$2,508.70 | | |
| Rejected Estimates | \$252.00 | | | | | \$252.00 | | |
| Total Estimates | \$21,693.35 | \$4,269.40 | \$5,205.25 | \$12,218.70 | | | | |

As there are no longer any Open Estimates for July 2008, they have all been dealt with

A new Accepted row has appeared along with the Rejected and Held totals

- 11 The Estimates have now been Accepted, Held or Rejected. Close both **Estimate Review Tool** screens in the normal manner. You are returned to the **RAMM Contractor** main screen.

Reviewing Held Estimate Lines when Presented Again

Introduction

The recommended practice for a Network Owner dealing with Estimate lines is to review them in bulk each month, on or after the 20th of the month. When you have previously Held Estimate lines, the Contractor addresses them. Estimate lines, once the problems have been addressed, are then Presented again. You as the Network Owner need to deal with these before the start of the Programme period.

Before you do this you need to have:

- Reviewed and Held Estimate lines. You do this using the Estimate Review Tool. See Reviewing Estimate Line Totals (on page 107) and Reviewing Individual Estimate Lines (on page 111).

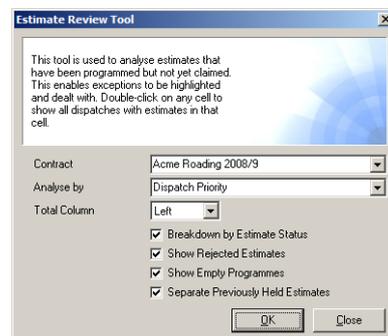
Menu Path

Follow the menu path Actions > Estimate Review Tool to open the **Estimate Review Tool** dialog.

► To Review Held Estimate Lines when Presented Again

To do this you follow these steps:

- 1 Select your contract from the Contract drop-down list.
- 2 Select the Separate Previously Held Estimates option.



- 3 You now have the option to filter what you are going to see by analysis and Estimate parameters. Make your choices and press to open the **Estimate Review Tool** screen.

The Maintenance Programme Estimate lines with which you need to deal will be in the Programme period column. In the graphic below they are in July 2008. Newly Presented Estimates will be in the Presented cell. Estimate lines which have been Presented again will be in the Previously Held Estimates cell. In the graphic below there are only the latter.

Contract: Acme Roading 2008/9

This tool shows all estimates which have been programmed but not yet claimed (if there are any). Double-click in any cell with a dollar value and the Dispatch screen will open showing all dispatches with estimates in the cell you double-clicked. At this point you can, depending on your permissions, change the status of estimates, adjust values, etc. When you exit the dispatch screen, this screen will refresh as some of the cell values may have changed depending on the actions you took in the Dispatch screen. Use the Print icon to print this report.

| Estimate Status | Total | Not Programmed | Maintenance Pool | July 2008 | August 2008 | September 2008 | October 2008 | November |
|---------------------------|--------------------|-------------------|-------------------|-------------------|-------------------|----------------|--------------|----------|
| Open Estimates | \$9,474.65 | \$4,269.40 | \$5,205.25 | | | | | |
| Accepted | \$9,710.00 | | \$9,710.00 | | | | | |
| Previously Held Estimates | \$2,508.70 | | \$250.00 | \$2,258.70 | | | | |
| Total Estimates | \$21,693.35 | \$4,269.40 | \$5,205.25 | \$9,960.00 | \$2,258.70 | | | |

- 4 Double-click in the cell with the Presented Estimates for the Programme period. This could be on the Presented row or as in the graphic above, on the Previously Held Estimates row. In the graphic above, the total is in the July 2008 column. The Dispatch maintenance screen with the Presented Dispatches listed.
- 5 Select the Presented Estimate line you wish to review.
- 6 Press the Line Notes tab to view the note from the Contractor explaining the reason for Presenting the Estimate line again after it had been placed on Hold.

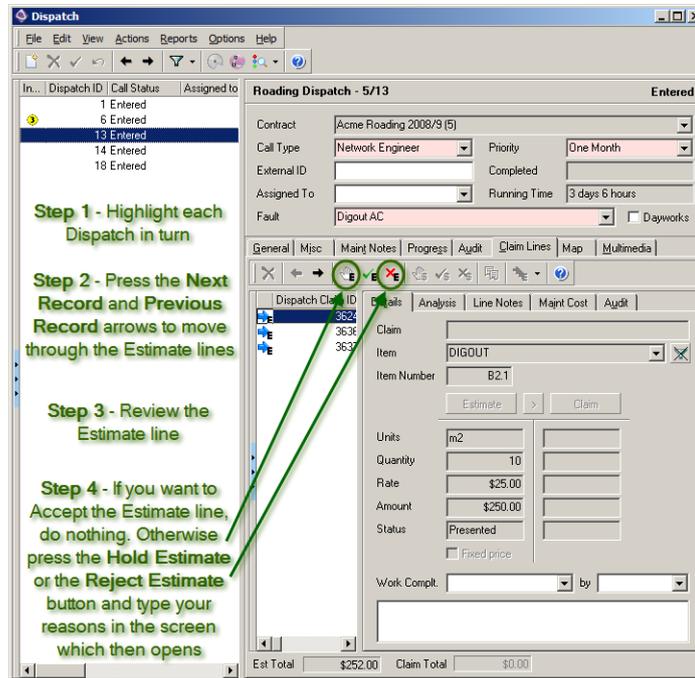
Dispatch Claim ID: 3600

| Message Text | Date added | Added By |
|---|-------------------------|-----------------|
| Holding Estimate Line: phone me about this one - Bill | 4/08/2008 4:48:00 p.m. | Grant Mackenzie |
| Re-presenting Estimate Line: Changes made as requested. Presented again | 6/08/2008 11:03:00 a.m. | Bill Billson |

General Notes:

Est Total: \$250.00 Claim Total: \$0.00

- 7 Press the Details tab to view the financial details and any other tabs which are relevant to the Estimate.



- 8 Review the Estimate lines. To do this you highlight each Dispatch in turn and use and to move through the Estimate lines. You only need to review the lines with the Presented icon. Do not press to Accept the legitimate Estimate lines as you are going to save time and Accept them all in bulk later.
- 9 To place a selected Estimate line on Hold press .
- 10 To Reject a selected Estimate line press .
- 11 When you have reviewed all the Estimate lines and Held or Rejected the ones you do not want to approve, close the **Dispatch** screen using your preferred method. You will be returned to the **Estimate Review Tool** screen.
- 12 Close the **Estimate Review Tool** screen. You will be returned to the **Estimate Review Tool** dialog.
- 13 Clear the Separate Previously Held Estimates option.
- 14 Press . The **Estimate Review Tool** screen will open. The **Presented** Estimates will now be grouped for you to Accept in bulk.
- 15 Double-click in the **Presented** cell for the Programme period to open the **Dispatch** maintenance screen and then close the screen.

| Estimate Status | Total | Not Programmed | Maintenance Pool | July 2008 | August 2008 | September 2008 | October 2008 | November |
|------------------------|--------------------|-------------------|-------------------|-------------------|-------------------|----------------|--------------|----------|
| Open Estimates | \$11,733.35 | \$4,269.40 | \$5,205.25 | | \$2,258.70 | | | |
| Presented | \$250.00 | | | \$250.00 | | | | |
| Accepted | \$9,710.00 | | | | \$9,710.00 | | | |
| Total Estimates | \$21,693.35 | \$4,269.40 | \$5,205.25 | \$9,960.00 | \$2,258.70 | | | |

- 16 Right-click in the **Presented** cell and select **Accept all Estimates...**
A **Confirmation** dialog will open asking if you really want to Accept all the Estimates.
- 17 Press to Accept in bulk, the Presented Estimate lines which have not been Rejected or Held. The total which was in the Presented line of the Programme period column will now appear in the Accepted line in the Programme period which you have chosen.

| Estimate Status | Total | Not Programmed | Maintenance Pool | July 2008 | August 2008 | September 2008 | October 2008 | November |
|------------------------|--------------------|-------------------|-------------------|-------------------|-------------------|----------------|--------------|----------|
| Open Estimates | \$11,733.35 | \$4,269.40 | \$5,205.25 | | \$2,258.70 | | | |
| Accepted | \$9,960.00 | | | | \$9,960.00 | | | |
| Total Estimates | \$21,693.35 | \$4,269.40 | \$5,205.25 | \$9,960.00 | \$2,258.70 | | | |

- 18 The addressed Estimates have now been approved, Held or Rejected. Close both **Estimate Review Tool** screens using . You will be returned to the **RAMM Contractor** main screen.

Claim Review Best Practice

The recommended practice is that on the first of each month of the Maintenance Contract, or whenever each Programme period starts, the Contractor and the Network Owner have agreed on the Programme for the month. The agreed works will be represented by the Accepted Estimate lines as shown in the Estimate Review Tool.

These are the Jobs which the Contractor and his staff will perform this Programme period.

Accepted Estimate Becomes Claim

When the Contractor completes a Job which includes Estimate lines, they become Claim lines.

Unchanged Claims Approved

If the Estimate line was accurate and remains unchanged when the user completes the Dispatch, it can be Accepted by the Network Owner without review. This is because the Network Owner has already approved the Job, the price and the period of performance when the Estimate line was approved.

Changed Estimates Reviewed

Where the Estimate line proved to be inaccurate and was changed as a result of extra work or materials required, the Claim Review Tool will alert the Network Owner to this. The Network Owner will then review the changed Estimate lines and either Accept, Reject or Hold them.

Open and Presented Claim Lines

A Network Owner does not have to deal with open Claim lines until they are Presented by the Contractor.

Claim Review Tool

The **RAMM Contractor** Claim Review Tool enables a Network Owner to see at a glance, the Claim lines for a Programme period. It also enables the handling of Claim lines in bulk. Use of this Tool maximises efficiency when dealing with Claim lines.



You should open the Claim Review Tool from the **Claim Maintenance** screen as it will then display only Claim line totals from the current Claim Header.

Best Practice Followed

If the recommended practice has been followed by both the Contractor and the Network Owner, most Claim lines will match the approved Estimate lines. So the Network Owner will have little to do.

There will always be discrepancies. The crew might arrive to do a Job whose Fault has become worse since it was first Estimated. The Contractor staff will then have to either change an Estimate line quantity or add a Claim line with no Estimate to account for the situation.

It is these lines which are outside the agreed Programme of works, with which the Network Owner needs to deal. The Contractor should have added Line Notes to the Claim lines to explain why they are outside the agreed Programme of works.

Estimate lines Become Claim Lines

Then when the Programme work is done and the Contractor Completes the Job, the Estimate lines automatically become Claim lines which, unless the Estimate was changed, do not need to be reviewed again, just Accepted and paid.

Maximise Efficiency

The Claim Review Tool can be used to group Claim lines by a variety of analysis parameters. This enables a Network Owner to deal with groups of Claim lines in a coordinated fashion.

In the graphic below you can see that the Estimate Review Tool filters and groups Claim lines. It then displays the totals in a readily understandable fashion.

| Claim Status | Total | No Estimates | Estimates (Matching) | Estimates (Not Matching) | | |
|--|--------------------|-------------------|----------------------|----------------------------|-------------------|---------------------|
| | | | | Claimed Value | Estimated Value | Over/Under Estimate |
| Contract: Acme Roothing 2008/9, Claim: August 2008 | | | | | | |
| This tool shows all claims and their estimates (if there are any). Double-click in any cell with a dollar value and the Dispatch screen will open showing all dispatches with claims in the cell you double-clicked. At this point you can, depending on your permissions, change the status of claims and/or estimates, e.g. accept claims where estimates have already been accepted. When you exit the dispatch screen, this screen will refresh as some of the cell values may have changed depending on the actions you took in the Dispatch screen. Use the Print icon to print this report. | | | | | | |
| Pending Claims | \$145.75 | | \$145.75 | Claimed Value | | |
| | | | | Estimated Value | | |
| | | | | Over/Under Estimate | | |
| Presented | \$4,413.50 | \$1,579.50 | \$2,534.00 | Claimed Value | | |
| | | | | Estimated Value | | |
| | | | | Over/Under Estimate | | |
| Held Claims | \$1,897.20 | \$1,897.20 | \$200.00 | Claimed Value | | |
| | | | | Estimated Value | | |
| | | | | Over/Under Estimate | | |
| Previously Held Claims | \$2,020.00 | \$2,020.00 | \$100.00 | Claimed Value | | |
| | | | | Estimated Value | | |
| | | | | Over/Under Estimate | | |
| Open Claims | \$4,563.90 | \$2,303.10 | \$550.80 | Claimed Value | \$1,710.00 | |
| | | | | Estimated Value | \$1,430.00 | |
| | | | | Over/Under Estimate | \$280.00 | |
| Total Claims | \$13,040.35 | \$7,799.80 | \$3,530.55 | Claimed Value | \$1,710.00 | |
| | | | | Estimated Value | \$1,430.00 | |
| | | | | Over/Under Estimate | \$280.00 | |

You can see:

- 1 The Contract and the Claim Header**
In the graphic above these are Acme Roothing 2008/9 and August 2008
- 2 Pending Claims**
These are Claims the Contractor has held back pending further information.
The Network Owner can ignore these Claim lines until they are Presented.

3**Presented Claims**

There are \$4,413.50 of **Presented Claims**. These represent the Claim lines from Jobs which have been Completed and Presented. As you can see by looking along the row into the **No Estimates** and the **Estimates (Matching)** sections, some of the Presented Claims had no Estimates and so will require review.

The Network Owner can Accept the **Estimates (Matching)** section **Presented Claims** without review.

4**Held Claims**

These are the \$1,897.20 of Claims which have been Held.

The Network Owner can ignore these Claim lines until they are addressed by the Contractor and Presented again.

5**Previously Held Claims**

These are \$2020.00 of Claims previously Held then addressed by the Contractor.

The Network Owner must review these as they may be **Open** or **Presented**.

6**Open Claims**

These are the \$4,563.90 worth of **Open Claims**. These are the Claim lines from Jobs which have been Completed but not yet Presented.

The Network Owner need not take any action until the Claim lines are Presented.

7**Presented Claims with No Estimates**

These are the \$1,579.50 worth of **Presented Claims with No Estimates**. These are Claim lines from Jobs which have been Completed but not did not go through the recommended practice **Estimate Presentation and Acceptance** process.

The Network Owner needs to review these Claim lines. If there is insufficient justification for the Jobs the Claim lines should be placed on Hold.

8**Previously Held Claims with No Estimates**

These are \$2020.00 of Claims previously Held then addressed by the Contractor.

The Network Owner must review these as, not only did they not go through the recommended practice **Estimate Presentation and Acceptance** process, but also they may be **Open** or **Presented**.

9**Presented Claims with Matching Estimates**

These are the \$2,534.00 of Claim lines where recommended practice has been followed.

The Network Owner can Accept these Claims in Bulk without review.

10**Previously Held Claims with Matching Estimates**

These are \$100.00 of Claims previously Held then addressed by the Contractor.

The Network Owner must review these as, even though they went through the recommended practice Estimate Presentation and Acceptance process, they may be Open or Presented.

11**Estimates (Matching) and Estimates (Not Matching)**

These are the columns which differentiate between the Claim lines based on matching Estimate lines - where recommended practice was followed - and those Claim lines which do not match their Estimate lines. This shows that recommended practice was not followed.

The Network Owner needs to carefully review Claim lines where recommended practice was not followed.

12**Open Claims with Estimates (Not Matching)**

There are \$1,710.00 of Claim lines which are \$280.00 more than their Estimate lines. When these are Presented, the Network Owner will need to carefully review them to check if the increase in price is justified.

The Network Owner does not need to take any action until the Claim lines are Presented.

Reviewing Claim Lines

Introduction

The recommended practice is that on the first of each month of the Maintenance Contract, the Contractor and the Network Owner have agreed on the Programme of works for the Programme period. When the Contractor staff have finished a Job or Dispatch, they Complete it in **Pocket RAMM** or in **RAMM Contractor**. The Estimate lines in the Job or Dispatch, then become Claim lines. The Contractor reviews and Presents the Claim lines for the Programme period.

As the period progresses, the Network Owner needs to regularly open the Claim Review Tool to review Claim lines which have been newly Presented.

**Tip**

You should open the Claim Review Tool from the **Claim Maintenance** screen as it will then display only Claim line totals from the current Claim Header.

The Network Owner has the options of Accepting, Holding or Rejecting the Presented Claim lines.

Before you do this you need to have:

- agreed with the Contractor the Programme of works for the period.

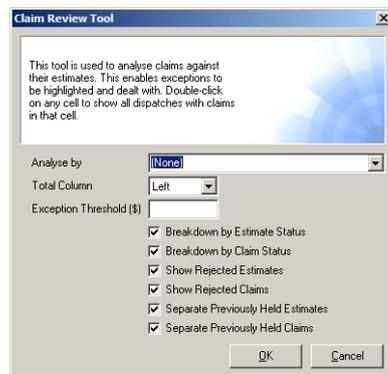
Menu Path

Follow the menu path Actions > Claims > (select Contract) > (press OK) > Actions > Claim Review Tool to open the **Claim Review Tool** dialog.

► To Review Claim Lines

To do this you follow these steps:

- 1 Select from the **Analyse by** drop-down list, the parameter by which you wish to filter the Claim line totals. If you wish to view all Claim line totals without filtering, accept the default (**None**).



- 2 The Claim line totals are on the left of the Claim Review Tool by default. This is usually the most convenient as the tool can be quite wide. It is recommended that you accept the default **Left** in the **Total Column** field.
- 3 The Estimate Review Tool highlights Estimates which differ from the Claim values. To ignore small differences, type, in the **Exception Threshold (\$)** field, the dollar value exception amount below which differences will be ignored. For instance, type **10.00** in the field for differences of \$10 or to be ignored.
- 4 You can now filter the display by Estimate status, Claim status, Rejection and Previously Held parameters. Make your selections and press . The **Claim Review Tool** will open. If recommended practice has been followed, most Presented Claim lines will be represented in the **Estimates (Matching) Accepted** column and require no review before Presentation. In the graphic below the total is **\$8,210.00**.

Claim Review Tool

Contract: Acme Roading 2008/9, Claim: July 2008

This tool shows all claims and their estimates (if there are any). Double-click in any cell with a dollar value and the Dispatch screen will open showing all dispatches with claims in the cell you double-clicked. At this point you can, depending on your permissions, change the status of claims and/or estimates, e.g. accept claims where estimates have already been accepted. When you exit the dispatch screen, this screen will refresh as some of the cell values may have changed depending on the actions you took in the Dispatch screen. Use the Print icon to print this report.

You do not need to review this Open total as it has not been Presented

Claim line totals for this Claim Header period are displayed

| Claim Status | Total | Estimates (Matching) | | | Estimates (Not Matching) | | | | |
|---------------------|--------------------|----------------------|-----------------|-----------------|---------------------------|---------------|------|-----------|-------------------|
| | | No Estimates | Open | Presented | Accepted | Claimed Value | Open | Presented | Accepted |
| Open Claims | \$145.75 | | \$145.75 | | | | | | |
| Presented | \$16,322.50 | \$5,492.50 | \$120.00 | \$8,210.00 | | | | | \$2,500.00 |
| Total Claims | \$16,468.25 | \$5,492.50 | \$145.75 | \$120.00 | \$8,210.00 | | | | \$2,500.00 |
| | | | | | Claimed Value | | | | \$1,750.00 |
| | | | | | Estimated Value | | | | \$750.00 |
| | | | | | Over/Under Esti... | | | | |

These Claim lines need review as they have no corresponding Estimate lines

These Claim lines need review as best practice was not followed - the Estimate lines were never Accepted

These Claim lines can be Accepted without review as best practice was followed

These Claim lines need review as they do not match the Estimate lines

- Double-click in a cell where there is a Presented Claim line total which needs review. This will open the Dispatch screen with the Claims which comprise the total listed. For the purposes of this procedure, the \$2,500 figure in the Accepted column of the Estimates (Not Matching) section is being checked.

Dispatch

Roading Dispatch - 5/14 Returned Complete

Contract: Acme Roading 2008/9 (5)

Call Type: Network Engineer Priority: One Month

External ID: Completed: 06/08/2008 16:20

Assigned To: Grant Mackenzie Running Time: 5 days 6 hours

Fault: Digout AC Dayworks

General | Misc | Maint Notes | Progress | Audit | Claim Lines | Map | Multimedia

Dispatch Claim ID: 362, 366, 366

Item: DIGOUT

Item Number: B2.1

Units: m2

Quantity: 70

Rate: \$25.00

Amount: \$1,750.00

Status: Accepted

Work Compl: 6/08/2008 4:20:00 p.m. by Grant Mackenz

Est Total: \$1750.00 Claim Total: \$2920.00 This Claim (1): \$2920.00

Highlight each Dispatch in turn

Press the Next Record and Previous Record arrows to move through the Claim lines

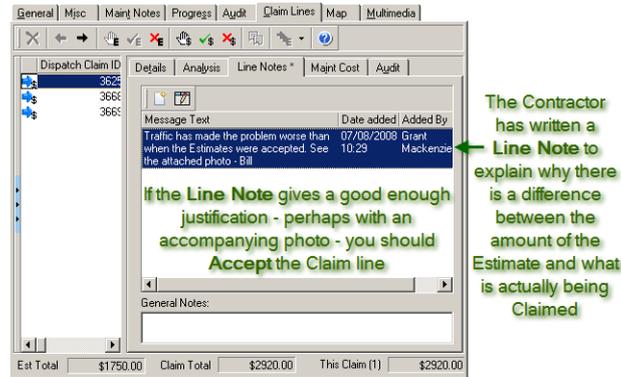
You can Hold or Reject the Claim line but do not Accept it as you will Accept the Claim lines in bulk later

If you Hold or Reject a Claim line you add a Note to explain your actions

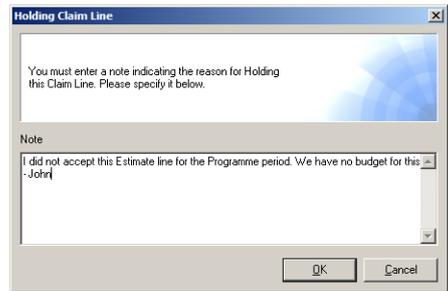
You can not change the financial information as only the Contractor can do that

Check the Line Notes and Multimedia tabs for relevant information

- Review the Claim lines to find those with discrepancies. Highlight each Dispatch in turn and use  and  to move through the Claim lines. You should check the Line Notes tab and the Multimedia tab for useful information.



- If you can not justify Accepting a particular Claim line you should place it on Hold. Then, when you Accept the Claim lines in bulk, this line will not be Accepted. Do not press . You are going to Accept the Claim lines in bulk later. Press  to place a selected Claim line on Hold. The **Holding Claim Line** dialog will open.



- Type a helpful note in the Note field.
- Press . The **Holding Claim Line** dialog will close and you will be returned to the **Dispatch** maintenance screen.
- When you have reviewed and dealt with all the Claim lines, close the **Dispatch** screen using your preferred method and you will be returned to the **Claim Review Tool** screen. The totals will refresh to reflect changes you have made.
- Do you want to review another total?

| | |
|------------|---------------------|
| Yes | then go to step 5. |
| No | then go to step 12. |

- 12 Double-click in the **Presented Total** cell.
The **Dispatch** maintenance screen will open with the Dispatches to be Accepted listed.
- 13 Make a final check that you really do want to Accept these Claim lines.
- 14 Close the **Dispatch** maintenance screen to return to the Claim Review Tool.
- 15 Right-click in the cell and select **Accept all Claims...**
A **Confirmation** dialog will open asking if you really want to Accept all the Claims.

| | | |
|---------------------|---------------|------------|
| Presented | \$1,200.50 | \$1,200.50 |
| Held Claims | \$4.2 | |
| Total Claims | \$13.8 | |

- 16 Press to Accept in bulk, the Presented Claim lines which have not been Rejected or Held.
The total which was in the Presented Claims cell will now appear in the Accepted line.

| Claim Status | Total | Estimates (Matching) | | | Estimates (Not Matching) | | | | |
|---------------------|--------------------|----------------------|-----------------|-----------|--------------------------|------------------------|------|-----------|----------|
| | | No Estimates | Open | Presented | Accepted | Claimed Value | Open | Presented | Accepted |
| Open Claims | \$145.75 | | \$145.75 | | | Claimed Value | | | |
| | | | | | | Estimated Value | | | |
| | | | | | | Over/Under Estima | | | |
| Accepted | \$9,492.50 | \$1,282.50 | | | \$8,210.00 | Claimed Value | | | |
| | | | | | | Estimated Value | | | |
| | | | | | | Over/Under Estima | | | |
| Held Claims | \$4,210.00 | \$4,210.00 | | | | Claimed Value | | | |
| | | | | | | Estimated Value | | | |
| | | | | | | Over/Under Estima | | | |
| Total Claims | \$13,848.25 | \$5,492.50 | \$145.75 | | \$8,210.00 | Claimed Value | | | |
| | | | | | | Estimated Value | | | |
| | | | | | | Over/Under Esti | | | |

- 17 Close both **Claim Review Tool** screens.
You will be returned to the **RAMM Contractor** main screen.

Held Claims

Industry practice has been to Hold Claim lines rather than to Reject them. So Rejected Claim lines have not featured in this Best Practice guide.

Reviewing Held Claim Lines when Presented Again

Introduction

As the Programme period progresses, the Network Owner should regularly review Held Claim lines addressed by the Contractor and newly Presented. The Network Owner can Accept, Hold or Reject the newly Presented Claim lines.



You should open the Claim Review Tool from the **Claim Maintenance** screen as it will then display only Claim line totals from the current Claim Header.

Before you do this you need to have:

- agreed with the Contractor the Programme of works for the period
- a copy of the contract to which to refer if necessary.

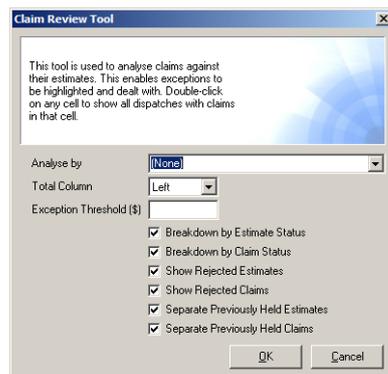
Menu Path

Follow the menu path Actions > Claims > (select Contract) > (press OK) > Actions > Claim Review Tool to open the **Claim Review Tool** dialog.

► To Review Held Claim Lines when Presented Again

To do this you follow these steps:

- 1 Select from the **Analyse by** drop-down list, the parameter to filter the Claim line totals or accept the default (**None**) to view all Claim line totals unfiltered.



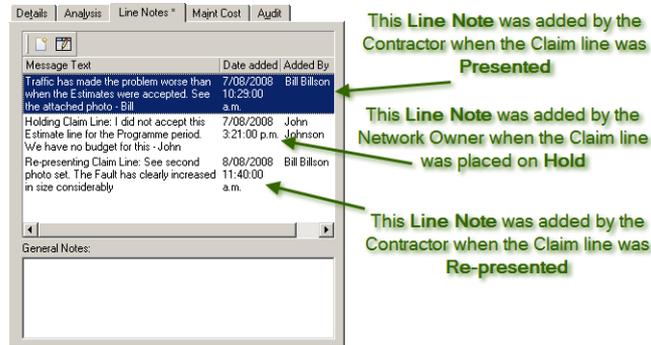
- 2 The Claim line totals are on the left of the Claim Review Tool by default. This is usually the most convenient as the tool can be quite wide. It is recommended that you accept the default **Left** in the **Total Column** field.
- 3 The Estimate Review Tool highlights Estimates which differ from the Claim values. To ignore small differences, type, in the **Exception Threshold (\$)** field, the dollar value exception amount below which differences will be ignored. For instance, type **10.00** in the field for differences of \$10 or to be ignored.
- 4 You can now filter the display by Estimate status, Claim status, Rejection and Previously Held parameters. Make your selections and press **OK**. The **Claim Review Tool** will open. The totals for the **Held** Claims addressed by the Contractor will now be in the **Presented** row, not the **Held** row. You need to review these Claim lines. In the graphic below this figure is \$2,920.00.

| Claim Status | Total | No Estimates | Estimates (Matching) | | | Estimates (Not Matching) | | | Claimed Value | Estimated Value | Over/Under Estimate |
|---------------------|--------------------|-------------------|----------------------|-----------|-----------------|--------------------------|-----------|----------|-------------------|-------------------|---------------------|
| | | | Open | Presented | Accepted | Open | Presented | Accepted | | | |
| Presented | \$2,920.00 | | | \$420.00 | | | | | \$2,500.00 | \$1,750.00 | \$750.00 |
| Accepted | \$3,492.50 | \$1,282.50 | | | \$8,210.00 | | | | | | |
| Held Claims | \$1,890.00 | \$1,890.00 | | | | | | | | | |
| Pending Claims | \$2,165.75 | \$1,900.00 | | | \$265.75 | | | | | | |
| Total Claims | \$16,468.25 | \$5,492.50 | | | \$265.75 | \$8,210.00 | | | \$2,500.00 | \$1,750.00 | \$750.00 |

- 5 Double-click in a cell where there is a Presented Claim line total which needs review. This will open the Dispatch screen with the Claims which comprise the total listed. For the purposes of this procedure, the \$2,500 figure in the Accepted column of the Estimates (Not Matching) section is being reviewed.
- 6 Review the Presented Claim lines to find those with discrepancies. To do this you highlight each Dispatch in turn and use ← and → to move through the Claim lines. You should check the Line Notes tab and the Multimedia tab for useful information.

| Dispatch Claim ID | Claim | Item | Item Number | Units | Quantity | Rate | Amount | Status |
|-------------------|--------------|--------|-------------|-------|----------|---------|------------|-----------|
| 366 | July 2008(1) | DIGOUT | B2 | m2 | 70 | \$25.00 | \$1,750.00 | Accepted |
| 366 | | | | m2 | 100 | \$25.00 | \$2,500.00 | Presented |

- 7 Press the Line Notes tab to view the reason why the Contractor has Re-presented the Claim lines.



- 8 If the changes or explanation of the Contractor are satisfactory and you are now able to Accept the Claim line, do not press as you are going to Accept the Claim lines in bulk later. If you do not have sufficient information at this stage to justify Accepting a particular Claim line you should place it on Hold so that when you Accept the Claim lines in bulk, this line is not Accepted.
- 9 To place a selected Claim line on Hold press . The **Holding Claim Line** dialog will open.
- 10 Type a helpful note in the Note field.
- 11 Press . The **Holding Claim Line** dialog will close and you will be returned to the **Dispatch** maintenance screen.
- 12 Close the **Dispatch** maintenance screen. You will be returned to the Estimate Review Tool.
- 13 Do you want to review another total?

| | |
|------------|---------------------|
| Yes | then go to step 5. |
| No | then go to step 14. |

- 14 Double-click in the **Presented Total** cell. The **Dispatch** maintenance screen will open with the Dispatches to be Accepted listed.
- 15 Make a final check that you really do want to Accept these Claim lines.
- 16 Close the **Dispatch** maintenance screen. You will be returned to the Claim Review Tool.
- 17 Right-click in the cell and select **Accept all Claims...** A **Confirmation** dialog will open asking if you really want to Accept all the Claims.
- 18 Press to Accept in bulk, the **Presented** Claim lines which have not been Rejected or Held. The total which was in the **Presented Claims** cell will now appear in the **Accepted** line.

| Claim Review Tool | | | | | |
|---------------------|--------------------|-------------------|--------------------|----------------------------|-------------------|
| Claim Status | Total | No Estimates | Estimates (Matc... | Estimates (Not Matching) | |
| | | | | Claimed Value | |
| | | | | Estimated Value | |
| | | | | Over/Under Estimate | |
| Accepted | \$12,412.50 | \$1,702.50 | \$8,210.00 | Claimed Value | \$2,500.00 |
| | | | | Estimated Value | \$1,750.00 |
| | | | | Over/Under Estimate | \$750.00 |
| Held Claims | \$1,890.00 | \$1,890.00 | | Claimed Value | |
| | | | | Estimated Value | |
| | | | | Over/Under Estimate | |
| Pending Claims | \$2,165.75 | \$1,900.00 | \$265.75 | Claimed Value | |
| | | | | Estimated Value | |
| | | | | Over/Under Estimate | |
| Total Claims | \$16,468.25 | \$5,492.50 | \$8,475.75 | Claimed Value | \$2,500.00 |
| | | | | Estimated Value | \$1,750.00 |
| | | | | Over/Under Estimate | \$750.00 |

- 19 Close both **Claim Review Tool** screens.
You will be returned to the **RAMM Contractor** main screen.

Presented Claim Header

When a Contractor has Prepared the Claim Header it is then Presented to the Network Owner for payment. Disputed Claim lines should have been removed from the Claim Header before it is Presented.

If the recommended practice has been followed, the Network Owner should be able to Accept the Claim and not use the Hold and Reject options.

Reviewing the Presented Claim Header

Introduction

By the time the Claim Header is Presented by the Contractor, all disputed Claim lines should have been dealt with. Only Accepted or Presented Claim lines should be Present in the Claim Header.

The Network Owner has the options of Accepting, Holding or Rejecting the Presented Claim lines. Lump Sum Contract payments may appear as Presented Claim lines, with no matching Estimate lines of course.



Tip

You should open the Claim Review Tool from the **Claim Maintenance** screen as it will then display only Claim line totals from the current Claim Header.

Before you do this you need to have:

- finished Claim line review for the Programme of works for the Programme period.

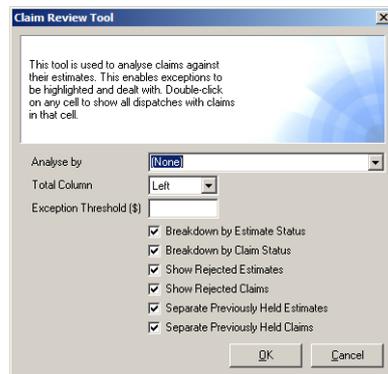
Menu Path

Follow the menu path Actions > Claims > (select Contract) > (press OK) > (select Claim Header) > Actions > Claim Review Tool to open the **Claim Review Tool** dialog.

► To Review the Presented Claim Header

To do this you follow these steps:

- 1 Select from the **Analyse by** drop-down list, the parameter to filter the Claim line totals or accept the default (**None**) to view all Claim line totals unfiltered.



- 2 The Claim line totals are on the left of the Claim Review Tool by default. This is usually the most convenient as the tool can be quite wide. It is recommended that you accept the default **Left** in the **Total Column** field.
- 3 The Estimate Review Tool highlights Estimates which differ from the Claim values. To ignore small differences, type, in the **Exception Threshold (\$)** field, the dollar value exception amount below which differences will be ignored. For instance, type **10.00** in the field for differences of \$10 or to be ignored.
- 4 You can now filter the display by Estimate status, Claim status, Rejection and Previously Held parameters. Make your selections and press **OK**. The **Claim Review Tool** will open. If you and the Contractor have followed recommended practice, there will be no **Open** or **Held** Claim lines. The only **Presented** Claim lines will be the monthly **Lump Sum** payments.

| Claim Status | Total | Estimates (Matching) | | | | Estimates (Not Matching) | | | |
|---------------------|--------------------|----------------------|------|-------------------|----------------------|--------------------------|---------------------------|-----------|----------|
| | | No Estimates | Open | Presented | Accepted | Claimed Value | Open | Presented | Accepted |
| Accepted | \$12,412.50 | \$1,702.50 | | \$8,210.00 | | \$2,500.00 | | | |
| Presented | \$17,079.75 | \$17,079.75 | | | | \$750.00 | | | |
| Total Claims | \$29,492.25 | \$18,782.25 | | \$8,210.00 | | \$2,500.00 | | | |
| | | | | | Claimed Value | Estimated Value | Over/Under Esti... | | |
| | | | | | | | | | |

You Accepted these Claim lines earlier so no action is required for them

These Presented Claim lines should be the monthly Lump Sum payments and can be Accepted in bulk

The Lump Sum payments have no corresponding Estimate lines as their price is fixed

These Estimates did not match but you have already checked and Accepted them

- 5 Double-click in the Presented Total cell to open the **Dispatch** screen with all the monthly Lump Sum Claim lines listed under a single Dispatch.

Dispatch

Roading Dispatch - 5/26 Complete

Contract: Acme Roading 2008/9 (5)

Call Type: Programme Priority: When Budget Allows

External ID: Completed: 11/08/2008 3:16:00 p.m.

Assigned To: Running Time: Immediate

Fault: Lump Sum

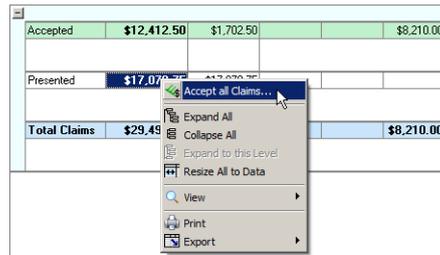
General Misc Maint Notes Progress Audit Claim Lines Map Multimedia

| Dispatch ... | Item Number | Details | Analysis | Line Notes | Majnt Cost | Audit |
|--------------|----------------|---|----------|------------|------------|-------|
| 3710 | EMERGENCY | Claim: July 2008 (1) | | | | |
| 3711 | ROUTINE BRID | Item: EMERGENCY CALLOUT SERVICE (Cycli) | | | | |
| 3712 | ROUTINE MAIN | Item Number: E5.1 | | | | |
| 3713 | UNSEALED ROZ | Units: month | | | | |
| 3714 | MAINTENANCE | Quantity: 1 | | | | |
| 3715 | CATCHPT GRA | Rate: \$1,500.00 | | | | |
| 3716 | CHANNEL SWEL | Amount: \$1,500.00 | | | | |
| 3717 | SEALED ROAD | Status: Presented | | | | |
| 3718 | TEMPORARY TI | Fixed price: <input type="checkbox"/> | | | | |
| 3719 | HEALTH & SAFE | Work Complt: 11/08/2008 3:16:00 p.m. by | | | | |
| 3720 | ENQUIRIES (Cyx | | | | | |
| 3721 | RAMM UPDATE | | | | | |
| 3722 | CONTRACT MEI | | | | | |
| 3723 | QUALITY ASSUI | | | | | |
| 3724 | REPORTS (Cycli | | | | | |
| 3725 | PROGRAMMING | | | | | |
| 3726 | INSPECTIONS (| | | | | |

Est Total: \$0.00 Claim Total: \$17079.75 This Claim (1): \$17079.75

- 6 Review the Claim lines to check for discrepancies. To do this you use and to move through the Claim lines. If a Lump Sum amount is incorrect, you should place it on Hold so that when you Accept the Claim lines in bulk, this line is not Accepted. To place a selected Claim line on Hold press . Do not press as you are going to Accept the Claim lines in bulk later.

- 7 When you have reviewed and dealt with all the Claim lines, close the **Dispatch** screen using your preferred method and you will be returned to the **Claim Review Tool** screen. The totals will refresh to reflect any changes you have made. In the example shown, there is no change as no lines were placed on **Hold**.
- 8 Highlight the **Presented Claims** total.



- 9 Right-click and select **Accept all Claims...**
A **Confirmation** dialog will open asking if you really want to Accept all the Claim lines.
- 10 Press .
The **Presented** Claim lines will be Accepted in bulk. The **Presented Claims** total will now appear in the **Accepted** line.

The screenshot shows the 'Claim Review Tool' interface with a detailed table. The table is divided into 'Estimates (Matching)' and 'Estimates (Not Matching)'. The 'Accepted' row now includes a 'Claimed Value' of \$8,210.00 and an 'Estimated Value' of \$1,750.00, with an 'Over/Under Estima...' of \$2,500.00.

| Claim Status | Total | Estimates (Matching) | | | Estimates (Not Matching) | | | |
|---------------------|--------------------|----------------------|------|-----------|--------------------------|---------------|------|-------------------|
| | | No Estimates | Open | Presented | Accepted | Claimed Value | Open | Presented |
| Accepted | \$29,492.25 | \$18,782.25 | | | \$8,210.00 | | | \$2,500.00 |
| | | | | | | | | \$1,750.00 |
| | | | | | | | | \$750.00 |
| Total Claims | \$29,492.25 | \$18,782.25 | | | \$8,210.00 | | | \$2,500.00 |
| | | | | | | | | \$1,750.00 |
| | | | | | | | | \$750.00 |

- 11 Close both **Claim Review Tool** screens.
You will be returned to the **RAMM Contractor** main screen.
- 12 Print off your preferred Claim report. Send it to the accounts department with instruction to pay the Claim as per the terms of the contract.

Dayworks Best Practice

Dayworks are those tasks which a Network Owner has a Contractor perform, which are outside their agreed Maintenance Contract. These need to be handled outside the regular Maintenance Programme.

Sometimes it will be the Contractor who discovers the requirement for Dayworks. Other times it will be the Network Owner.

As Dayworks are outside the Maintenance Programme, the Network Owner and the Contractor will not be looking out for Dayworks Dispatches. So when the Contractor adds a Dayworks Dispatch, they need to contact the Network Owner to advise them to review the Estimate lines. Similarly, if the Network Owner discovers the need for Dayworks, they need to advise the Contractor to create the Dispatch and to let them know when it is ready.

When the Job is Completed, the Claim will be paid subject to the normal audit processes.

In This Chapter

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| Dayworks - Contractor | 135 |
| Dayworks - Network Owner..... | 144 |

Dayworks – Contractor

This section describes how a Contractor should Estimate Dayworks, for a Network Owner using **Pocket RAMM** and **RAMM Contractor**.

Estimation Process

There is a recommended process for a Contractor to follow when estimating Dayworks . See Dayworks Estimation Process for the Contractor (on page 136).

Add Dayworks Estimates

When you add a Job in **Pocket RAMM** you have the option to designate it as Dayworks. If you do not assign it to a Programme, it will appear in the left hand Not Programmed column in the **Estimate Review Tool** screen. See Adding a Dayworks Estimate Job (on page 137).

Dayworks Filter

The Estimate Review Tool does not specifically group Dayworks Estimate lines. As they are not assigned to a Programme, they will appear by default in the left hand Not Programmed column in the **Estimate Review Tool** screen. However, Programme Jobs where the recommended practice has not been followed will also appear in the left hand column if they have been assigned to neither the Maintenance Pool nor to a Programme period.

So you should create a filter in **RAMM Contractor** to enable you to access these. See Setting Up the Dayworks Filter (on page 140).

Approved Dayworks Filter

When the Network Owner has approved the Dayworks Estimate lines, you will want to set up a filter to enable you to group and access these. See Setting Up the Approved Dayworks Filter (on page 142).

Once the Estimated have been approved, you can perform the work.

Dayworks Estimation Process for the Contractor

The following is the recommended process for Dayworks Estimation.

- 1 A Dayworks Estimate is to be submitted by the Contractor, when needed or when requested by the Network Owner.
- 2 The Contractor should inform the Network Owner by email or telephone that an Estimate has been submitted.
- 3 The Network Owner should process the Estimate as soon as possible so that the Contractor can plan for the work and start the Dayworks on schedule.
- 4 The Network Owner should inform the Contractor by email or telephone that the Estimate has been Accepted, or Rejected.
- 5 The Contractor should check for the Dayworks Accepted by the Network Owner and schedule the physical work.

- 6 The Contractor should check for the **Rejected** or **Held** Dayworks, address them and Present them again if appropriate.

Adding a Dayworks Estimate Job

Introduction

The Contractor is responsible for adding Dayworks Jobs with Estimate lines. A Dayworks Estimate should be submitted by the Contractor, when it is needed or when it has been requested by the Network Owner.

The recommended practice is to add Jobs from the **Map** screen, not the **Jobs** screen.

Before you do this you need to have:

- set CSIs available to be used for Dayworks. See the CSIs chapter of the *RAMM Contractor* guide.
- an agreed Dayworks Estimation process
- found the Asset or location with which to associate the Job and be standing next to it with your PDA.

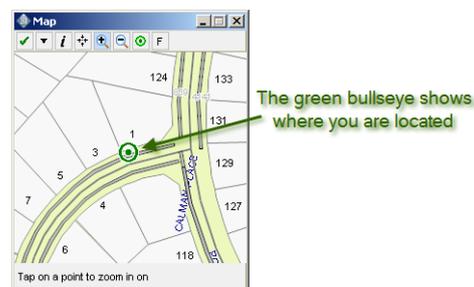
Menu Path

Tap  to open the **Map** screen.

► To Add a Job as a Dayworks Estimate

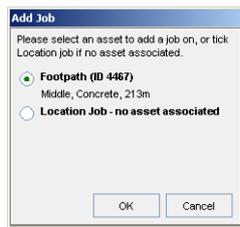
To do this you follow these steps:

- 1 The **Map** screen will be open. It will show the Asset or location for the Job because you are standing next to it. In the graphic below you are on the footpath in Calman Place.

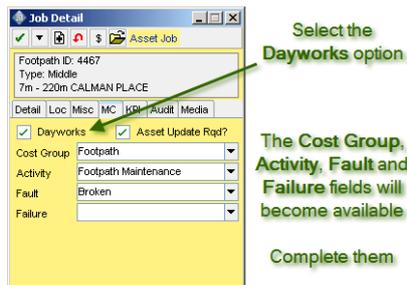


- 2 Tap  and select Add Job.

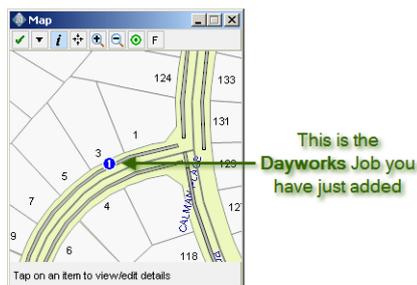
- 3 Tap on the Asset or the location. In this example the Footpath (ID 4467) has been tapped.
The **Add Job** dialog will open. You will be offered the opportunity to add the Job to the Asset or to a Location with no relationship to the Asset. Unless the Job is a Roothing Job such as a Pothole, select the Asset option.



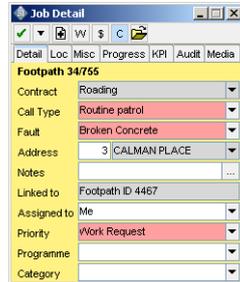
- 4 Press .
The Job Detail screen will open.
- 5 Add the Contract, Call Type, Fault and other details as per a standard Job.
- 6 Press the MC tab.
The **Job Details** screen will open at the Maintenance Costs panel.
- 7 Select the Dayworks Job option.
The Cost Group, Activity, Fault and Failure fields will become available.



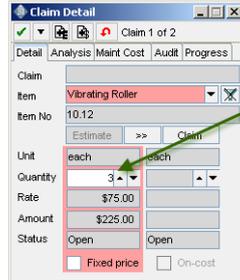
- 8 If the Job is a Roothing Job, fill in all Dimensions fields on the Loc tab.
- 9 Tap .
The **Map** screen will open. There will be an icon for the Job you have just entered.



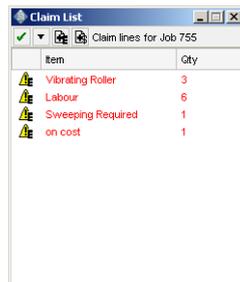
- 10 Tap the Job icon.
The **Job Detail** screen will open.



- 11 Tap and take photographs of the Job as visual proof of the costs on the Claim lines you will enter below.
- 12 Tap .
You will be returned to the **Jobs** detail screen.
- 13 Tap .
The **Claim List** screen will open.
- 14 Tap .
The **Detail** tab of the **Claim List** screen will open.
- 15 Select the Schedule Item from the **Item** drop-down list.
- 16 Set the **Quantity** field to the correct value.



- 17 Press the **Maint Cost** tab and complete the **Cost Group**, **Activity**, **Fault** and **Failure** fields
- 18 Tap .
The Estimate line is saved. You will be returned to the **Claim List** screen, where you will see the Schedule Items you have added in the list.



- 19 Do you need to add another Estimate line?

| | |
|------------|---------------------|
| Yes | then go to step 13. |
| No | then go to step 20. |

20 Tap twice.

You will be returned to the **Pocket RAMM Online** or grey screen. The Job has now been successfully entered as a Dayworks Estimate.

Setting Up the Dayworks Filter

Introduction

When Dispatches with Dayworks Estimate lines have been added in **Pocket RAMM** or **RAMM Contractor**, you are able to view and manage them in **RAMM Contractor**. The Estimate Review Tool does not group Dayworks. So you need to set up a filter to deal with Dayworks efficiently.

You do this by setting up a filter to:

- view the Dayworks Estimate Dispatches in **RAMM Contractor**.

Before you do this you need to have:

- added the Dayworks Estimates. You do this in **Pocket RAMM**. See Adding a Dayworks Estimate Job (on page 137).

Menu Path

Follow the menu path Actions > Dispatch Entry or press  to open the **Dispatch** selection dialog.

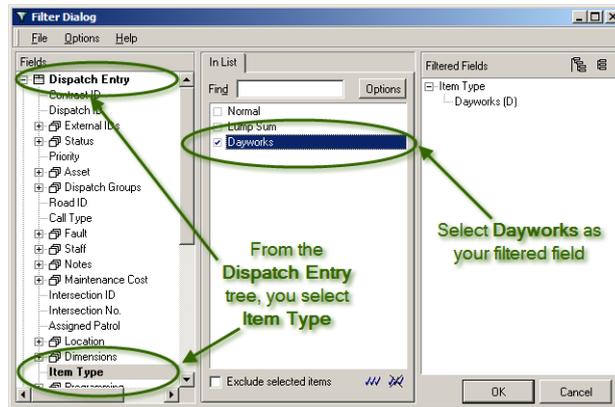
► Setting Up the Dayworks Filter

To do this you follow these steps:

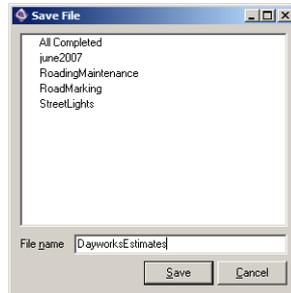
- 1 Select **Show the Filter Dialog** from the Initial Dispatch Selection drop-down list.



- 2 Press .
The **Filter Dialog** will open.
- 3 Press adjacent to Dispatch Entry in the Fields panel.
The Dispatch Entry tree will expand.
- 4 Select Item Type from the Dispatch Entry tree in the Fields panel.
The options Normal, Lump Sum and Dayworks will become available at the In List tab.



- 5 At the In List tab on the unnamed Filter Criteria panel, select Dayworks.
- 6 Follow the menu path File > Save As.
The **Save File** dialog will open.



- 7 Type Dayworks Estimates or a name you prefer, in the File name field.
- 8 Press .
Your changes are saved, the **Save File** dialog will close and you will be returned to the **Filter Dialog**.
- 9 Press .
The **Filter Dialog** will close and the **Dispatch** maintenance screen will open with the Dayworks Dispatches listed in the (unnamed) Dispatch List panel.
- 10 Close the screen in your preferred manner.
You will be returned to the **RAMM Contractor** main screen. Next time you open the **Dispatch** selection dialog, the saved filter Dayworks Estimates or a name you prefer, will be available from the Initial Dispatch Selection drop-down list.

Setting Up the Approved Dayworks Filter

Introduction

When the Network Owner has Accepted Dayworks Estimates, you will want to assign the Jobs to your Dayworks field crews. The Estimate Review Tool does not group Dayworks Estimate lines. So you need to set up a filter to deal with Accepted Dayworks Estimates efficiently.

Before you do this you need to have:

- set up your Dayworks filter. You do this at the **Filter Dialog**. See Setting Up the Dayworks Filter (on page 140).

Menu Path

Follow the menu path Actions > Dispatch Entry or press  to open the **Dispatch** selection dialog.

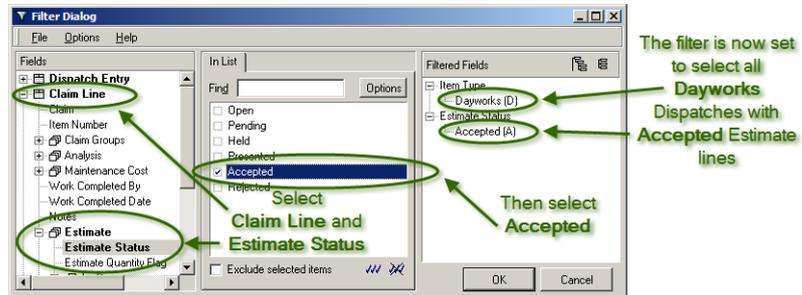
► Setting Up the Approved Dayworks Filter

To do this you follow these steps:

- 1 Select your Dayworks filter from the Initial Dispatch Selection drop-down list.



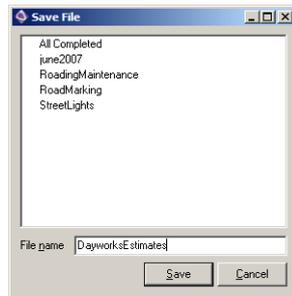
- 2 Press . The **Filter Dialog** will close and the **Dispatch** maintenance screen will open with the Dayworks Dispatches listed in the (unnamed) Dispatch List panel.
- 3 Press . The **Filter Dialog** will open with the settings from your Dayworks filter.
- 4 Select Claim Line > Estimate > Estimate Status in the Fields panel. The Estimate status options will become available at the In List tab on the unnamed Filter Criteria panel.
- 5 At the In List tab on the unnamed Filter Criteria panel, select Accepted.



 If you are managing more than one Asset type, you may wish to further refine the Programme selections by selecting Asset Type and adding Asset criteria to the filtered fields.

NOTE

- 6 Follow the menu path File > Save As. The **Save File** dialog will open.



- 7 Type Dayworks Accepted Estimates or a similar name, in the File name field.
- 8 Press **Save**.
Your changes are saved, the **Save File** dialog will close and you will be returned to the **Filter Dialog**.
- 9 Press **OK**.
The **Filter Dialog** will close and the **Dispatch** maintenance screen will open with the Dayworks Dispatches with Accepted Estimates listed in the (unnamed) Dispatch List panel.
- 10 Assign the Dispatches to the person responsible for overseeing the Dayworks.
- 11 Close the **Dispatch** maintenance screen in your preferred manner.
You will be returned to the **RAMM Contractor** main screen. Next time you open the **Dispatch** selection dialog, the saved filter Dayworks Accepted Estimates will be available from the Initial Dispatch Selection drop-down list.

Dayworks – Network Owner

This section describes how a Network Owner should set up a filter to deal with Presented Dayworks Estimate lines using **RAMM Contractor**.

Review Process

There is a recommended practice process for a Network Owner to follow when reviewing Dayworks Estimates. See Dayworks Review Process for the Network Owner (on page 144).

Add Dayworks Estimates

When you add a Job in **Pocket RAMM** you have the option to designate it as Dayworks. If you do not assign it to a Programme, it will appear in the left hand Not Programmed column in the **Estimate Review Tool** screen. See Adding a Dayworks Estimate Job (on page 137).

Dayworks Filter for Review and Approval

The Estimate Review Tool does not specifically group Dayworks Estimate lines. As they are not assigned to a Programme, they will appear by default in the left hand Not Programmed column in the **Estimate Review Tool** screen. However, Programme Jobs where the recommended practice has not been followed will also appear in the Not Programmed column if they have been assigned to neither the Maintenance Pool nor to a Programme period.

So you should create a filter in **RAMM Contractor** to enable you to access and review these Dayworks Estimate lines. See Setting Up a Dayworks Filter for Approvals (on page 145).

Dayworks Review Process for the Network Owner

The following is the recommended process for Dayworks review.

- 1 Where the Network Owner is the source of the Dayworks request, they should advise the Contractor of the need for the Dayworks Job and ask them to send in an Estimate.
- 2 A Dayworks Dispatch or Job with Estimate lines is to be submitted by the Contractor, when needed or when requested by the Network Owner.
- 3 The Contractor should inform the Network Owner by email or telephone that an Estimate has been submitted.
- 4 The Network Owner should process the Estimate as soon as possible so that the Contractor can plan for the work and start the Dayworks on schedule.

- 5 The Network Owner should inform the Contractor by email or telephone that the Estimate has been Accepted, or Rejected.
- 6 The Contractor should check for the Dayworks Accepted by the Network Owner and schedule the physical work.
- 7 The Contractor should check for the Dayworks Rejected or placed on Hold by the Network Owner, address them and Present them again if appropriate.
- 8 The Network Owner then audits the Dayworks and if satisfactory, pays for the work.

Setting Up a Dayworks Filter for Approvals

Introduction

Once the Contractor has notified the Network Owner by email or telephone that a Dayworks Estimate is pending Approval, the Network Owner needs to review and, if appropriate, approve the Dayworks Estimate lines prior to the Contractor commencing the work.

You simplify the activity by setting up a filter to group the Dayworks Estimate lines for review in **RAMM Contractor**.

Before you do this you need to have:

- launched **RAMM Contractor**.

Menu Path

Follow the menu path Actions > Dispatch Entry or press  to open the **Dispatch** selection dialog.

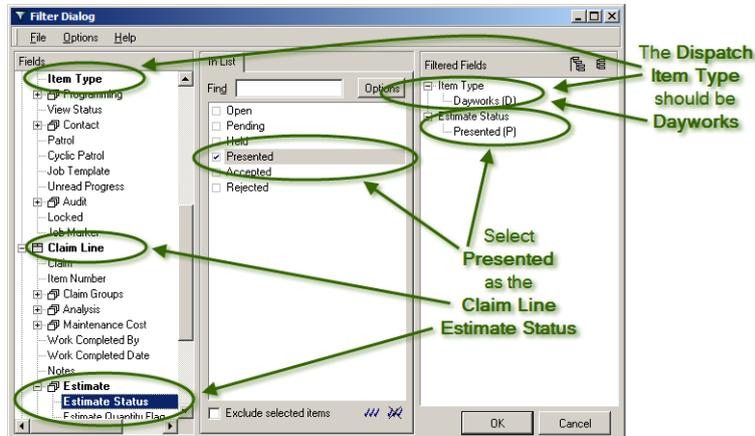
► Setting Up a Dayworks Filter for Approvals

To do this you follow these steps:

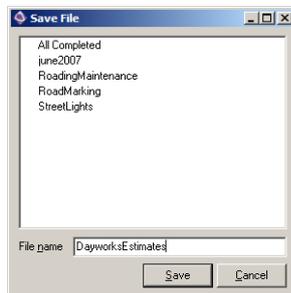
- 1 Select Show the Filter Dialog from the Initial Dispatch Selection drop-down list.



- 2 Press .
The **Filter Dialog** will open.



- 3 Press **[+]** adjacent to Dispatch Entry in the Fields panel.
The Dispatch Entry tree will expand.
- 4 Select Item Type from the Dispatch Entry tree in the Fields panel.
The options Normal, Lump Sum and Dayworks will become available at the In List tab.
- 5 At the In List tab on the unnamed Filter Criteria panel, select Dayworks.
- 6 Press **[+]** adjacent to Claim Line.
The Claim Line tree will expand.
- 7 Press **[+]** adjacent to Estimate.
The Estimate tree will expand.
- 8 Select Estimate Status in the Fields panel.
The Estimate status options will become available at the In List tab on the unnamed Filter Criteria panel.
- 9 At the In List tab on the unnamed Filter Criteria panel, select Accepted.
- 10 Follow the menu path File > Save As.
The **Save File** dialog will open.



- 11 Type Presented Dayworks Estimates or a name you prefer, in the File name field.
- 12 Press **[Save]**.
Your changes are saved, the **Save File** dialog will close and you will be returned to the **Filter Dialog**.

- 13 Press . The **Filter Dialog** will close and the **Dispatch** maintenance screen will open with the Dayworks Dispatches with **Presented** Estimate lines listed in the (unnamed) **Dispatch List** panel.
- 14 Review the Estimate lines. You open each Dispatch in turn and deal with each Estimate line individually.
- 15 Close the screen in your preferred manner. You will be returned to the **RAMM Contractor** main screen. Next time you open the **Dispatch** selection dialog, the saved filter **Presented Dayworks Estimates**, or a name you prefer, will be available from the **Initial Dispatch Selection** drop-down list.

Audit Best Practice

Standard business practice is for the Network Owner or the Consultant to audit the work for which the Contractor has Claimed payment from the Network Owner. You can set up **RAMM Contractor** to assist in this process.

You may have devised your own audit methods. It is likely that it will involve:

- regular Patrols, both to check and report on the state of the Network. In **RAMM Contractor** these are referred to as Cyclic Patrols. These are performed by the Contractor to monitor and report on the condition of the Road Network. They are done to the specification of the Network Owner. Those on patrol identify potholes, detritus and other Faults.
- regular checking on the integrity of the **RAMM** database. This is critical to the management of Network Assets. You could use a 10% Network Audit to achieve this. Its purpose is to ascertain whether, when a Contractor has completed a Job, the **RAMM** database Assets are represented correctly and any changes accurately made.
- verifying that the Contractor is correctly identifying and repairing Network Faults. This is crucial for contracts that have a large percentage of Lump Sum Claims. The process to achieve this is known as an Independent Network Audit in **RAMM Contractor**. You set up a specific Audit Contract and apply Independent Network Auditing to specific sections of Carriageway or Roads that you know the Contractor is scheduled to be working on. It enables you to compare Faults identified by you, with the work completed by the Contractor.

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| Cyclic Patrols | 150 |
| 10% Network Audit..... | 158 |

Cyclic Patrols

A Road Network will wear out over time. Events such as high traffic usage, motor vehicle accidents and extreme weather can damage a Road Network. It is important that somebody identifies Road Network Faults before they worsen so that their repair can be Programmed. The Network Owner needs to be advised of the Faults.

It is important that this is not a random process. It needs to be properly planned so that the entire Network is checked and that this is done in an efficient manner. This Road Network checking is done through a system of Cyclic Patrols.

Cyclic Patrols are performed by the Contractor to monitor and report on the condition of the Road Network. They are done to the specification of the Network Owner. Those on Patrol identify potholes, detritus and other Faults.

They are generally Lump Sum items in a contract. So the Network Owner will want to be able to audit that the Cyclic Patrols are actually being performed to the required standard. Similarly, the Contractor will also want to know that his crew whose Job it is to perform these Cyclic Patrols are actually doing this.

You set up **RAMM Contractor** to enable both parties to audit this process.

Cyclic Patrols and the Roads Travelled Report

Generally Cyclic Patrols are Lump Sum budget items. It is important that both Contractor and Network Owner are satisfied that Cyclic Patrols are being performed in a timely and cost effective manner with adequate Network coverage.

Roads Travelled Report

Both Contractor and Network Owner can view Patrol movements on a **Map** and generate the related Roads Travelled report. This report shows the following information about the Cyclic Patrol:

- which crew members performed the Patrol
- which Roads were covered
- how many times a Dispatch or Job has been worked on
- how long each Job has taken.

The Contractor benefits from being able to see both current and historical movements of a Patrol crew. The Network Owner has the certainty that the money is properly spent.

Viewing Patrol Records

Introduction

Cyclic Patrols are performed by the Contractor to monitor and report on the condition of the Road Network. The Network Owner will want to be assured that the Patrols are taking place. Both the Contractor and the Network Owner can view the Roads Travelled report to check on staff movements.

Before you do this you need to have:

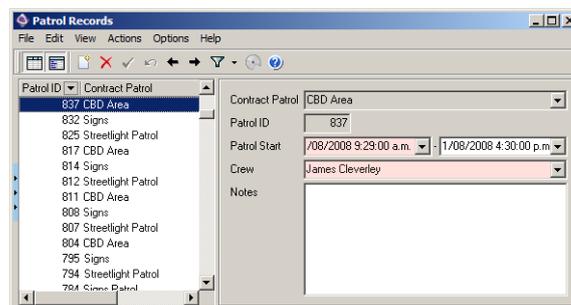
- instructed the Cyclic Patrol crew to activate **Pocket RAMM** and the GPS tool and to perform the Cyclic Patrols.

Menu Path

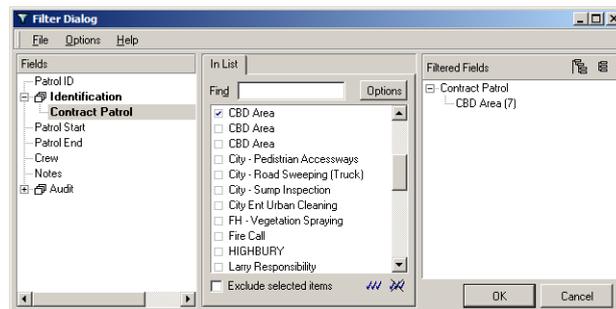
Follow the menu path Actions > Patrol Records to open the **Patrol Records** screen. It is filtered by default to Patrols within the last month.

► To View Patrol Records

To do this you follow these steps:



- 1 If you wish to view all records for a given Patrol, follow the menu path Options > Edit Filter or press CTRL+F or press  to open the **Filter Dialog**.



- 2 Select **Identification** in the **Fields** panel, and then select the Patrol you wish to view in the **Filter Criteria** panel.
- 3 Press .
The **Filter Dialog** will close and you will be returned to the **Patrol Records** screen with the records for the selected Patrol listed.
- 4 You now have the following options.

| If you want to | then |
|---------------------------------|--|
| run the Patrol report | see Patrol Report (on page 152). |
| show the Patrol on a Map | see Show Patrol on Map (on page 153). |
| run the Roads Travelled report | see Roads Travelled Report (on page 154). |
| close the screen | go to step 5. |

- 5 Close the screen in the normal manner.
You will be returned to the **RAMM Contractor** main screen.

Patrol Report

The Patrol report is a listing of Patrols by Contract.

You would use this report to list all Cyclic Patrols performed within a set time period or for a particular Contract or both. To determine which Patrols are to be listed in the report, you filter the reports in the Patrol Records screen. The records available in the screen at the time of producing the report will be the ones listed in the report. If you need to know more about using Filters, see the Filters chapter of the *Using RAMM* guide.

The records are grouped by Contract. You have the option to have the Patrol list for each Contract start on a new page. A Network Owner would use this report to see that the Cyclic Patrols are actually being done as per the Contract provisions. From the Patrol Records screen you follow the menu path **Actions > Patrol Report**.

| CJN Technologies Limited | | User: Grant Mackenzie | | Page: 12 | | |
|--|----------------------------|--------------------------------------|------------|-----------------|--------------|-------------|
| Hill Valley Regional Council | | Printed: Tuesday, 1 April 2008 14:45 | | | | |
| Patrol Report | | | | | | |
| Patrol ID | Contract Patrol | Start Time | End Time | Crew Name | Notes | Dis patches |
| Contract: Street Light 2006 -2008 #.2926 | | | | | | |
| 604 | Monthly Streetlight Patrol | 31/07/2007 | 09/08/2007 | James Cleverley | Aug2007 | 50 |
| 599 | Monthly Streetlight Patrol | 25/07/2007 | | James Cleverley | square db | 7 |
| 591 | Monthly Streetlight Patrol | 23/07/2007 | 26/07/2007 | James Cleverley | Test | 0 |
| 549 | Monthly Streetlight Patrol | 02/07/2007 | 23/07/2007 | James Cleverley | July 2007 | 71 |
| 535 | Monthly Streetlight Patrol | 05/06/2007 | 11/06/2007 | James Cleverley | June 2007 | 55 |
| 532 | Monthly Streetlight Patrol | 07/05/2007 | 15/05/2007 | James Cleverley | May 2007 | 69 |
| 529 | Monthly Streetlight Patrol | 02/04/2007 | 12/04/2007 | James Cleverley | April patrol | 68 |
| —RAMM Contractor 2008/Build 23.0008— | | | | | | |
| End of Report —Source: (fPatrolRpt)— | | | | | | |

Show Patrol on Map

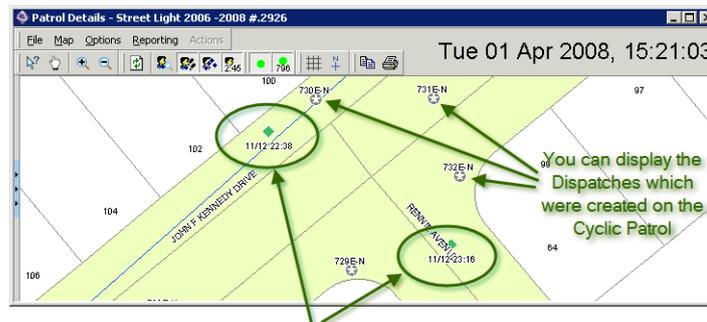
You can use the **Map** to view Cyclic Patrols and create reports. You create reports on the work of the Patrol being viewed from the **Map** screen itself. Both Contract and Network Owner would want to view Patrol movements on a **Map**. The Contractor would benefit from being able to see both current and historical movements of a Patrol crew. The Network Owner would have the certainty that their money is properly spent.

Display the Patrol on the Map

To show a Patrol on the **Map**, you follow the menu path Actions > Patrol Records to open the **Patrol Records** screen. You set the filter to bring up a list containing the Patrol(s) you want to view on the **Map**. If you need helpful information on using Filters, see the Filter chapter of the *Using RAMM* guide. Select the Patrol you want to view on the **Map** and follow the menu path Actions > Show Patrol on Map.



The **Map** will open. What you see will depend on your **Map** settings.



The places are shown where the GPS positions of the Patrol crew member were taken during the Cyclic Patrol. These are time stamped



NOTE You can use the Show Patrol on Map and Roads Travelled Report options only if the Patrol crew members use **Pocket RAMM** and you access **RAMM Contractor** using the **RAMM** Hosting Service.

Roads Travelled Report

Both Contractor and Network Owner can view Patrol movements on a **Map** and generate the related Roads Travelled report. This report shows the following information about the Cyclic Patrol:

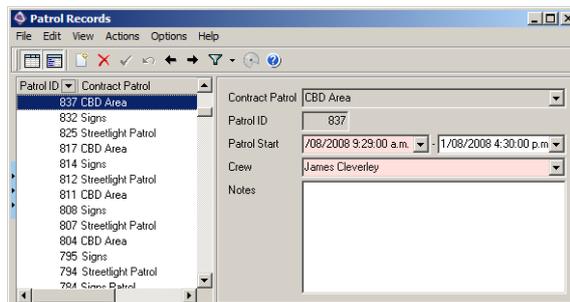
- which crew members performed the Patrol
- which Roads were covered
- how many times a Dispatch or Job has been worked on
- how long each Job has taken.

The Contractor benefits from being able to see both current and historical movements of a Patrol crew. The Network Owner has the certainty that the money is properly spent.

Run the Report

You follow the menu path Actions > Patrol Records to open the **Patrol Records** screen. Initially, there will be no Patrols listed.

You configure a filter to list the Patrols for which you want to run the report. See the Filter chapter of the *Working with RAMM* guide. If you select Clear Filter at the Filter button  all completed Patrols from all Contracts for which you have the appropriate Staff Permissions will be listed in the (unnamed) Contract Patrol list panel.



Select the Patrol for the report and follow the menu path Actions > Roads Travelled Report. The **Roads Travelled Report** screen will open at the Report Selection tab.

Select the Crew Members

If there is more than one crew member listed you can select one or more for which to run the report.



You can use the Show Patrol on Map and Roads Travelled Report options only if the Patrol crew members use **Pocket RAMM** and you access **RAMM Contractor** using the **RAMM** Hosting Service.

Select the Time Period

You may be running the report well after the Patrol has been completed. If so, the From field will display the date and time when the Patrol actually started but the to field will have the current date which will not be useful.

You use the blue highlighted links to the left of the fields to select the start and end time and dates of the report. For instance, as you can see in the graphic above, the + 12 hours option has been pressed and the value in the to field is twelve hours later than the value in the From field on the morning of the following day.

Options

If you press the Options tab you can configure the report to:

- be printed or to appear in a standard **RAMM** grid
- include Dispatches not associated with the travel path
- list the Roads travelled in sequential or alphabetical order.

It is recommended that you select the Include Dispatches not associated with travel path option. Otherwise, if your Patrol crew have added a Dispatch on a Road which was not recorded, perhaps because they were in an area with poor broadband reception, the Dispatch will not appear in the report.

CJN Technologies Limited
Hill Valley Regional Council

User: Grant Mackenzie Page:1 of 1
Printed: Tuesday, 15 April 2008 11:16

Roads Travelled Report

Grant Mackenzie - 07/08/2007 15:53 to 08/08/2007 03:53, sorted in sequential order

| Road Name | Length | Displacement | Time period | Dispatch Job | Asset Type | Fault Type | Status | Origin |
|------------------------------|--------|--------------|--------------------|--------------|------------|-----------------|------------|--------|
| Tuesday 07 Aug 2007 | | | | | | | | |
| Crew Member: Grant Mackenzie | | | | | | | | |
| RAINFORTH ST (499) | 349 | 10 - | 97 15:53 - 15:54 | | | | | |
| MARGARET ST (368) | 415 | 113 - | 113 15:54 - 15:55 | | | | | |
| KARINA TCE (316) | 380 | 0 - | 228 15:55 - 15:59 | | | | | |
| UPPER MAIN ST (976) | 211 | 195 - | 195 15:59 - 16:00 | | | | | |
| BRISTOL CRES (79) | 211 | 81 - | 81 16:00 - 16:01 | | | | | |
| CLYDE CRES (137) | 937 | 123 - | 753 16:01 - 16:03 | | | | | |
| ELLIOT ST (196) | 99 | 21 - | 21 16:03 - 16:04 | | | | | |
| ANDREW AVE (25) | 597 | 384 - | 523 16:04 - 16:07 | | | | | |
| HULME ST (286) | 380 | 9 - | 9 16:07 - 16:11 | 7367 | Signs | rea upgrade | Dispatched | Added |
| RANGIORA AVE (505) | 1254 | 279 - | 927 16:14 - 16:16 | 7368 | Signs | Vandalism | Dispatched | Added |
| RANGIORA AVE (505) | 1254 | 270 - | 279 16:28 - 16:30 | 7369 | Signs | broken concrete | Dispatched | Added |
| RUAHINE ST (532) | 3794 | 1398 - | 1498 16:30 - 16:31 | | | | | |
| MAIN EAST S (812) | 2224 | 738 - | 903 16:32 - 16:35 | | | | | |
| RUAHINE ST (532) | 3794 | 116 - | 1422 16:35 - 16:39 | | | | | |
| TREMAINE AVE (613) | 6504 | 5303 - | 5303 16:39 - 16:40 | | | | | |
| VOGEL ST (630) | 1633 | 14 - | 14 16:40 - 16:41 | | | | | |
| HUMBER ST (287) | 336 | 160 - | 160 16:41 - 16:42 | | | | | |
| SKOGLAND PARK (7069) | 167 | 0 - | 0 16:42 - 16:43 | | | | | |
| TREMAINE AVE (613) | 6504 | 5303 - | 5303 16:43 - 16:44 | | | | | |

The Roads travelled are listed sequentially or alphabetically

The staff member(s) who performed the Patrol is (are) identified

Dispatches created during the Patrol are listed

Viewing the Roads Travelled Report

Introduction

Cyclic Patrols are performed by the Contractor to monitor and report on the condition of the Road Network. They are done to the specification of the Network Owner who will want to be assured that the patrols are taking place. Both the Contractor and the Network Owner can view the Roads Travelled report to check on staff movements.

Before you do this you need to have:

- instructed the Cyclic Patrol crew to activate **Pocket RAMM** and the GPS tool and to perform the Cyclic Patrol. If they have not used **Pocket RAMM** and the GPS tool the report will not be available.
- the View patrols on the map Staff Permission selected
- access to **RAMM Contractor** using the **RAMM Hosting Service**.

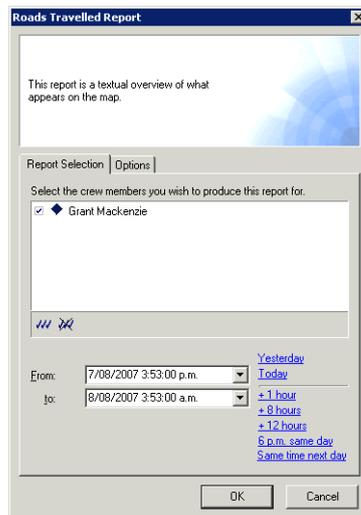
Menu Path

Follow the menu path Actions > Patrol Records to open the **Patrol Records** screen. It is filtered by default to Patrols within the last month.

► Viewing the Roads Travelled Report

To do this you follow these steps:

- 1 Select a patrol.
- 2 Press . The **Map** screen will open. The location points for the selected Patrol will display. The report lists the Roads travelled by a given PDA device using **Pocket RAMM** and thereby, the user of the device.
- 3 Select Reporting > Roads Travelled Report. An initial dialog will allow you to:
 - select a crew member
 - configure a time period
 - set an order for the report.
- 4 Select whether to order the list Roads by time **Sequential order**, or an alphabetical list of Roads **Road name order**.



- 5 Make your selection.
- 6 Press . The report will open.

CJN Technologies Limited
Hill Valley Regional Council

User: Grant Mackenzie Page:1 of 1
Printed: Tuesday, 15 April 2008 11:16

Roads Travelled Report

Grant Mackenzie - 07/08/2007 15:53 to 08/08/2007 03:53, sorted in sequential order

| Road Name | Length | Displacement | Time period | Dispatch Job | Asset Type | Fault Type | Status | Origin |
|------------------------------|--------|--------------|--------------------|--------------|------------|-----------------|------------|--------|
| Crew Member: Grant Mackenzie | | | | | | | | |
| Tuesday 07 Aug 2007 | | | | | | | | |
| RAINFORTH ST (499) | 349 | 10 - | 07 15:53 - 15:54 | | | | | |
| MARGARET ST (388) | 435 | 113 - | 113 15:54 - 15:55 | | | | | |
| KARINA TCE (316) | 380 | 0 - | 228 15:55 - 15:59 | | | | | |
| UPPER MAIN ST (976) | 211 | 195 - | 195 15:59 - 16:00 | | | | | |
| BRISTOL CRES (79) | 211 | 81 - | 81 16:00 - 16:01 | | | | | |
| CLYDE CRES (137) | 937 | 123 - | 763 16:01 - 16:03 | | | | | |
| ELLIOT ST (196) | 99 | 21 - | 21 16:03 - 16:04 | | | | | |
| ANDREW AVE (25) | 597 | 364 - | 523 16:04 - 16:07 | | | | | |
| HULME ST (296) | 300 | 9 - | 9 16:07 - 16:08 | 7367 | Signs | req upgrade | Dispatched | Added |
| RANGIORA AVE (505) | 1254 | 279 - | 927 16:14 - 16:18 | 7368 | Signs | Vandalism | Dispatched | Added |
| RANGIORA AVE (505) | 1254 | 270 - | 279 16:28 - 16:30 | 7369 | Signs | broken concrete | Dispatched | Added |
| RUAHINE ST (532) | 3794 | 1388 - | 1486 16:30 - 16:33 | | | | | |
| MAIN EAST S (812) | 4224 | 488 - | 903 16:32 - 16:35 | | | | | |
| RUAHINE ST (532) | 3704 | 116 - | 1422 16:35 - 16:39 | | | | | |
| TREMAINE AVE (613) | 6504 | 5303 - | 5303 16:39 - 16:40 | | | | | |
| VOGEL ST (630) | 1633 | 14 - | 14 16:40 - 16:41 | | | | | |
| HUMBER ST (287) | 338 | 160 - | 160 16:41 - 16:42 | | | | | |
| SKOGLAND PARK (7069) | 167 | 0 - | 0 16:42 - 16:43 | | | | | |
| TREMAINE AVE (613) | 6504 | 5303 - | 5303 16:43 - 16:44 | | | | | |

The Roads travelled are listed sequentially or alphabetically

The staff member(s) who performed the Patrol is (are) identified

Dispatches created during the Patrol are listed

7 You can now save, export or print the report.

8 Press

The report will close and you will be returned to the **RAMM Contractor** main screen.

10% Network Audit

This section describes the recommended practice for performing a 10% Network Audit of field crew work by a Contract Manager, supervisor, Network Owner or Consultant.

Database Integrity Audit

The integrity of the **RAMM** database is critical to the management of Network Assets. The purpose of a 10% Network Audit is to be sure that when a Contractor has completed a Job, the **RAMM** database Assets are represented correctly and any changes accurately made.

Pocket RAMM

You use **Pocket RAMM** as the Network auditing tool. You check whether Asset information has been correctly recorded and updated. This is done when the field crew have completed a certain number of Jobs for an agreed period. A month is a typical time frame. The audit is not required for all Jobs completed by the field crew. A representative sample of 10% of the completed Jobs is sufficient.

Reports

You can then define your own reports to show the results of the audit. You can then generate the reports and use them to improve standards if required.

Not Audit of Job

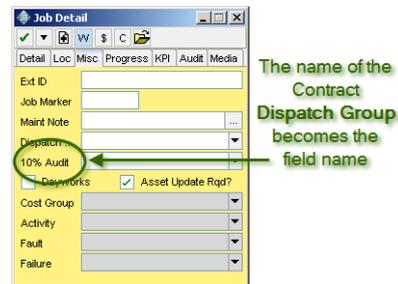
A 10% Network Audit is also used to determine whether the Contractor has repaired a Fault properly and whether the price was fair.

10% Network Audit Set Up

In order to perform a random audit of 10% of the Jobs completed, you need to have a parameter with which you can group those Dispatches you wish to audit. The most obvious way to do this is to use a Dispatch Group.

Dispatch Group Name

The name of the Dispatch Group should be chosen carefully as it needs to reflect your actual audit practices. The other requirement for the name is that it is short as it will be the field name on the Misc tab in **Pocket RAMM**. That is why the recommended practice is to name it 10% Audit.



Designate Dispatches To Be Audited

Once you have created your Dispatch Group you add descriptions to group the Dispatches. The first grouping you need to add is the To Be Audited group.

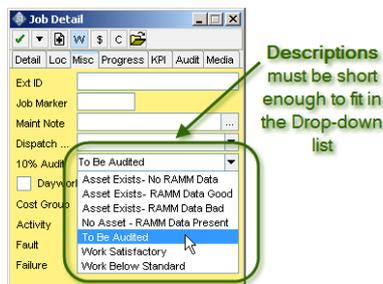
When you have selected the random 10% of completed Jobs which you wish to audit, you would assign a Dispatch Group description of To Be Audited. The audit staff will then be in no doubt about whether or not the Dispatch is to be audited.

Add Short Descriptions

As well as the To Be Audited description, you need to add others to describe the state of the **RAMM** Asset data related to the Job. When the audit staff select one of your user-defined descriptions, this has the two benefits. Firstly, it assigns a Dispatch parameter which can be used for your audit reports. Secondly, as this description replaces the To Be Audited description, it shows that the Dispatch no longer needs to be audited.

Recommended practice is to use the names below or other short descriptions which match your business practices. They need to be short as they will be options in a **Pocket RAMM** drop-down list.

- Asset Exists - RAMM Data Correct
- Asset Exists - RAMM Data Wrong
- Asset Exists - No RAMM Data
- No Asset - RAMM Data Present.



Adding an Audit Dispatch Group

Introduction

You need to have a parameter by which you can identify those Jobs which you are going to audit. You then need to be able to see which of those Jobs has been audited and those which have not. You do this by setting up a Dispatch Group and defining individual descriptions to match your business practices.

Contract Dispatch Groups are used to group Dispatches for analysis and reporting purposes for an individual Contract. You create them only if a standard **RAMM Contractor** function to group the Dispatches does not already exist.

The person using **Pocket RAMM** to perform the audit uses the preset descriptions to describe whether or not the **RAMM** data in the database is correct and to identify the problem, if any.

Before you do this you need to have:

- decided on the descriptions which match your business practices. Examples are suggested below. See 10% Network Audit Set Up (on page 159).

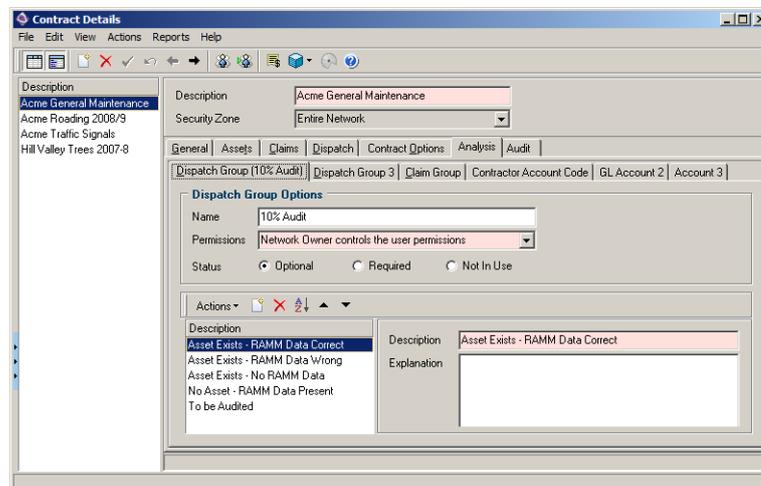
Menu Path

Follow the menu path Maintenance > Contract Details > (press Analysis tab) to open the **Contract Details** screen at the Analysis tab.

► Adding an Audit Dispatch Group

To do this you follow these steps:

- 1 Press the Dispatch Group tab.



- 2 Add and save a new Dispatch Group record in the standard **RAMM** fashion. Name it 10% Audit or another very short name which matches your business practices. It need to be short as it will be a field name in **Pocket RAMM**.
- 3 Add and save the following description records in the standard **RAMM** fashion. Use the names below or other short descriptions which match your business practices. They need to be short as they will be options in a **Pocket RAMM** drop-down list.
 - Asset Exists - RAMM Data Correct
 - Asset Exists - RAMM Data Wrong
 - Asset Exists - No RAMM Data
 - No Asset - RAMM Data Present
 - To be Audited.
- 4 Close the screen in your preferred fashion. You will be returned to the **RAMM Contractor** main screen.

Completed Dispatch Audit Selection

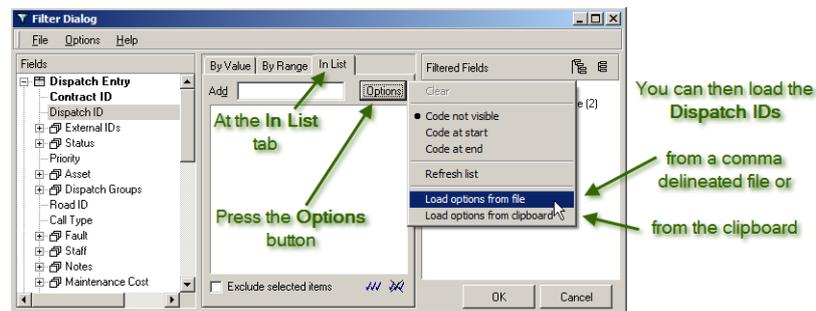
The recommended practice is to select a completely random grouping of 10% of completed Dispatches and to audit them. There is no method within **RAMM** of grouping Dispatches at random. So to have truly random grouping you would need to do this outside **RAMM**.

Export to Excel

One method to achieve this would be to filter Dispatches completed in a Programme period and export the data to a spreadsheet such as Excel. Once in the external spreadsheet, the data can be stripped to include only the Dispatch IDs. A random 10% selection is then saved in a comma delineated text file or saved to the clipboard.

Load Options from File or Clipboard

You then open the **Filter Dialog** from the **Dispatch** maintenance screen and select your Contract as the first filter parameter. You then select the Dispatch ID as the second parameter. If you press the In List tab, you can press the Options button and use Load options from file or Load options from clipboard to import the text file containing the random Dispatch IDs. These become your filter grouping.



Other Options

Instead of selecting a truly random group, you may prefer to audit a number of Dispatches in the same area, of the highest value, completed by a particular crew or related to a specific Asset type.

Defining and Assigning Dispatches for Audit

Introduction

When the Dispatches for the Programme period have been Completed, the recommended practice is to do a data audit. This is referred to as a 10% Audit in **RAMM Contractor**.

You first select the group of Dispatches to be audited. Then you define them to show that they require auditing. You then assign the Dispatches to the person or crew who are to perform the audit.

Before you do this you need to have:

- set up the Audit Dispatch Group. You do this at the Dispatch Group tab on the Analysis tab of the **Contract Details** screen. See Adding an Audit Dispatch Group (on page 160).
- selected the group of Dispatches to be audited. See Completed Dispatch Audit Selection (on page 162).

Menu Path

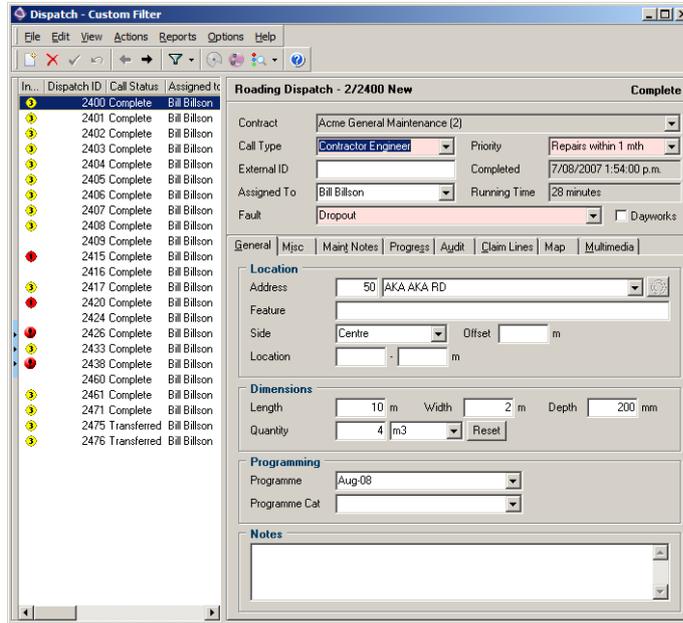
Follow the menu path Actions > Dispatch Entry or press  on the toolbar of the **RAMM Contractor** main screen to open the **Dispatch** filter screen.

► To Define and Assign Dispatches for Audit

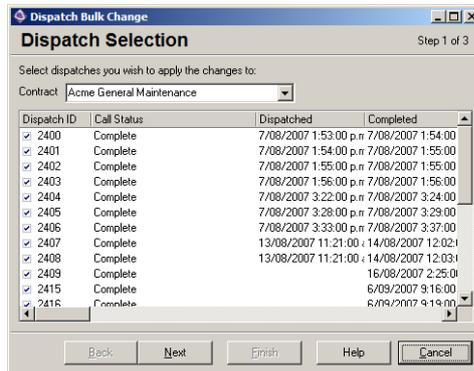
To do this you follow these steps:



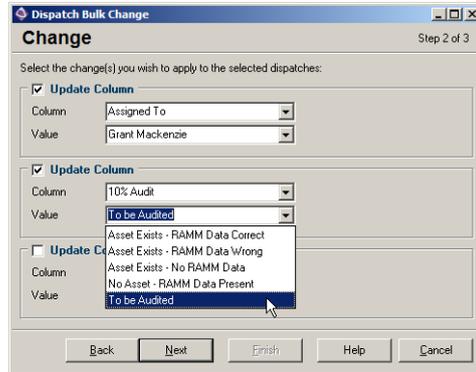
- 1 Select the option which selects only the Dispatches to be audited. If you do not have a predefined filter to do this, select **Show the Filter Dialog** and configure one.
- 2 Press . The **Dispatch** maintenance screen will open with the group of Dispatches to be audited, listed in the (unnamed) Dispatch List panel.



- 3 Follow the menu path Actions > Bulk Change.
The **Dispatch Bulk Change** screen will open at the Dispatch Selection panel.

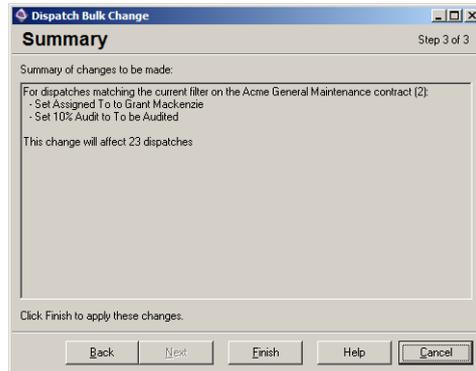


- 4 Select your contract from the Contract drop-down list.
- 5 The Dispatches which were listed in the (unnamed) Dispatch List panel, will be listed and selected by default in the Dispatch Selection panel. If your original selection of Dispatches to be audited was correct, you can accept the default Selected Dispatches. If not, clear the check boxes adjacent to the Dispatches you do not want to audit.
- 6 Press **Next**.
The Change panel will open.



- 7 Select, from the Column drop-down list, the Assign to option.
- 8 Select, from the Value drop-down list, the name of the person or crew who are to perform the audit.
- 9 Select the next Update Column check box.
The Column and Value drop-down lists will become available.
- 10 Select, from the Column drop-down list, the Set 10% Audit option.
- 11 Select, from the Value drop-down list, To be Audited.
- 12 Press .

The Summary panel will open. This will list the actions which you have just done and show the number of Dispatches which will be affected if you continue.



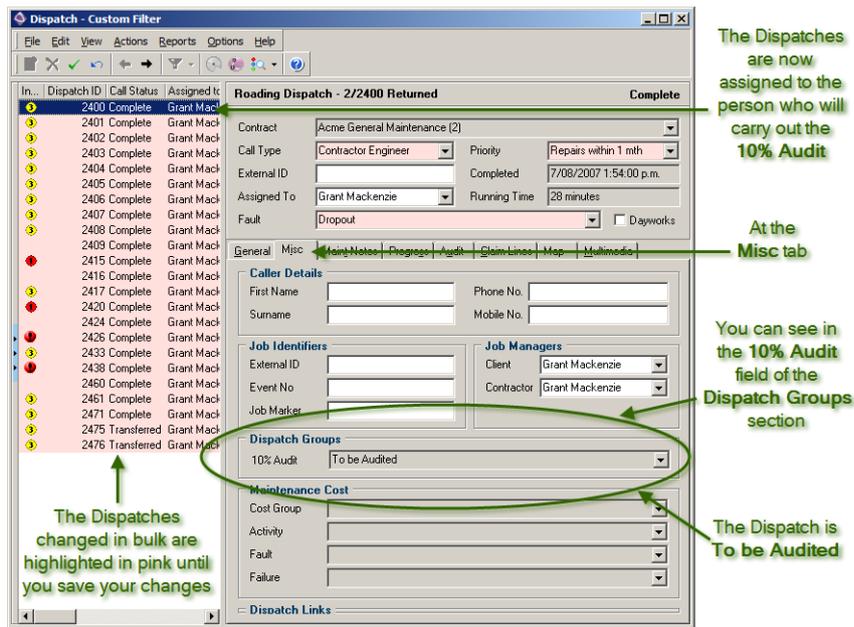
- 13 Are the details correct?

| | |
|------------|---------------------|
| Yes | then go to step 16. |
| No | then go to step 14. |

- 14 Press until you reach the Dispatch Selection panel.
- 15 Go to step 5.

16 Press

The **Dispatch Bulk Change** screen will close. You will be returned to the **Dispatch** maintenance screen. The affected Dispatches will be highlighted in the List panel of the **Dispatch** screen. The changes you have made will display.



17 Press

Your changes will be saved. The Dispatches listed will lose their highlight.

18 Close the **Dispatch** screen in your preferred manner.

You will be returned to the **RAMM Contractor** main screen.

19 Contact the person or crew who are going to perform the 10% Audit and advise them that they have been assigned Dispatches to audit.

10% Network Auditing in Pocket RAMM

Introduction

A 10% Network Audit is used to ensure the integrity of the data in the **RAMM** database. You use **Pocket RAMM** to perform a Network data audit. You perform a 10% Network Audit to be sure that when a Contractor has Completed a Job, the **RAMM** database Assets have been represented correctly and any changes have been accurately made.

Before you do this you need to have:

- defined and assigned the 10% Audit Dispatches. You do this at the **Dispatch** maintenance screen. See Defining and Assigning Dispatches for Audit (on page 163).
- logged in to **Pocket RAMM**.

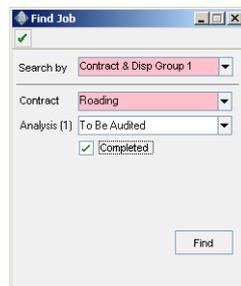
Menu Path

Tap  to open the **Job List** screen.

► 10% Network Auditing in Pocket RAMM

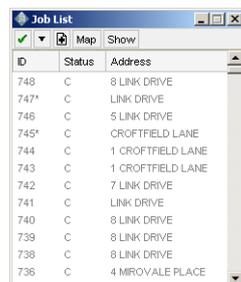
To do this you follow these steps:

- 1 Follow the menu path Show > Find.
The Search panel will open.



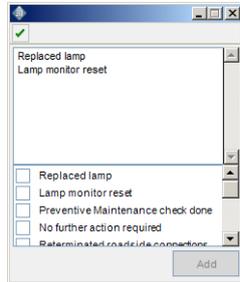
- 2 Select Contract & Dispatch Group at the Search by drop-down list.
- 3 Select your Contract at the Contract drop-down list.
- 4 Select To be Audited at the Analysis drop-down list.
- 5 Select the Completed check box.
- 6 Tap .

You will be returned to the **Job List** screen with all the Jobs for audit listed.

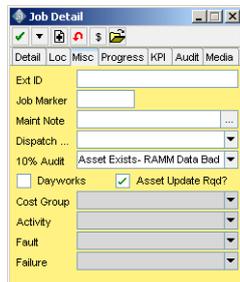


| ID | Status | Address |
|------|--------|-------------------|
| 748 | C | 8 LINK DRIVE |
| 747* | C | LINK DRIVE |
| 746 | C | 5 LINK DRIVE |
| 745* | C | CROFTFIELD LANE |
| 744 | C | 1 CROFTFIELD LANE |
| 743 | C | 1 CROFTFIELD LANE |
| 742 | C | 7 LINK DRIVE |
| 741 | C | LINK DRIVE |
| 740 | C | 8 LINK DRIVE |
| 739 | C | 8 LINK DRIVE |
| 738 | C | 8 LINK DRIVE |
| 736 | C | 4 MIROVALE PLACE |

- 7 Tap the Job you want to audit.
The **Details** tab for the Job will open.
- 8 Use **Pocket RAMM** to perform physical checks on the Jobs.
- 9 As you inspect the Job, you can insert Maintenance Notes if appropriate. You do this at the (unnamed) **Maintenance Note** screen.



- 10 When you have finished inspecting the Asset and **RAMM** data, select the appropriate audit description from the 10% Audit drop-down list.



- 11 Press .
Your changes will be saved and you will be returned to the **Jobs** list screen.
- 12 Do you have another Job to audit?

| | |
|------------|---------------------|
| Yes | then go to step 7. |
| No | then go to step 14. |

- 13 Press .
You will be returned to the **Pocket RAMM Online** or grey screen.

Reporting on the 10% Network Audit

Introduction

When the 10% Audit has been completed, you use **RAMM Contractor** filtering to group and view the Dispatches. You then use **RAMM Contractor** reports to view and manage the results of the audit. You do this by setting up a filter to list the audited Dispatches and then report on the grouped Dispatches.

Before you do this you need to have:

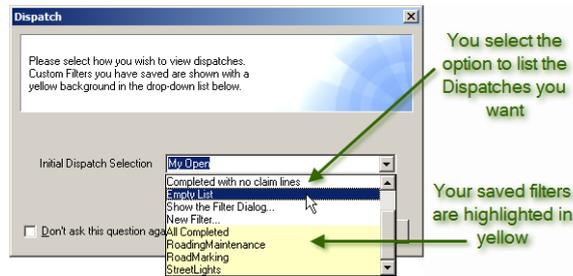
- audited the Dispatches. You do this in **Pocket RAMM**. See 10% Network Auditing in Pocket RAMM (on page 166).

Menu Path

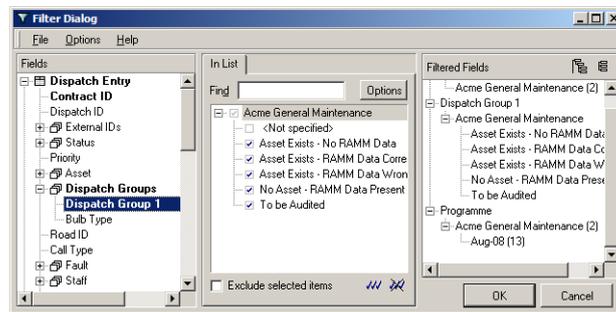
Follow the menu path Actions > Dispatch Entry or press  to open the **Dispatch** selection dialog.

▶ Reporting on the 10% Network Audit

To do this you follow these steps:



- 1 Select, from the Initial Dispatch Selection drop-down list, the Show the Filter Dialog option.
- 2 Press . The **Filter Dialog** will open.
- 3 Select your Contract and Dispatch Group values and Programme.



- 4 Press . The **Filter Dialog** will close and you will be returned to the **Dispatch** maintenance screen. All the audited Dispatches for the Programme period will be listed in the (unnamed) Dispatch List panel.
- 5 You can now generate a report to record the results of your audit. Under the **Reports** menu option there are a variety of alternatives. The option which is best for you will depend on your circumstances. Below is the Dispatch Analysis report.

| Dispatch Group 1 | Administration | Berms | Roading | Street Lights | Total |
|----------------------------------|----------------|-------|---------|---------------|-------|
| Asset Exists - No RAMM Data | | | | 3.00 | 3.00 |
| Asset Exists - RAMM Data Correct | 1.00 | | 7.00 | 2.00 | 10.00 |
| Asset Exists - RAMM Data Wrong | | | 5.00 | | 5.00 |
| No Asset - RAMM Data Present | | | 3.00 | | 3.00 |
| To be Audited | | 2.00 | | | 2.00 |

- 6 You can print out the report data and save it to a file so that you can use the results later.
- 7 Close the screens in your preferred manner.
You will be returned to the **RAMM Contractor** main screen.



If you want more information on Dispatch reports, see the Dispatch Reports section of the Dispatch chapter of the *RAMM Contractor* guide.

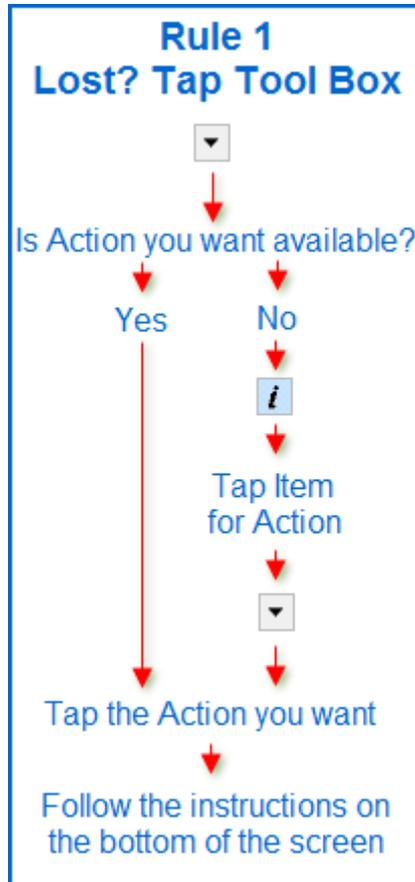
If you want more information on reporting and the Decision cube, see the Getting Information Out of **RAMM** chapter of the *Using RAMM* guide.

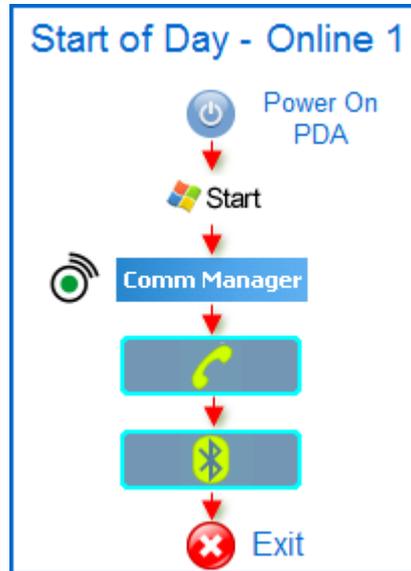
Appendix One

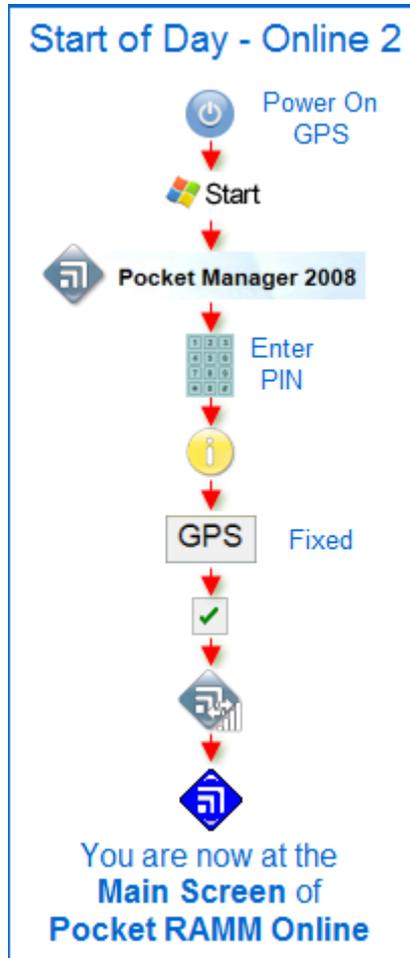
Pocket RAMM Flowcharts

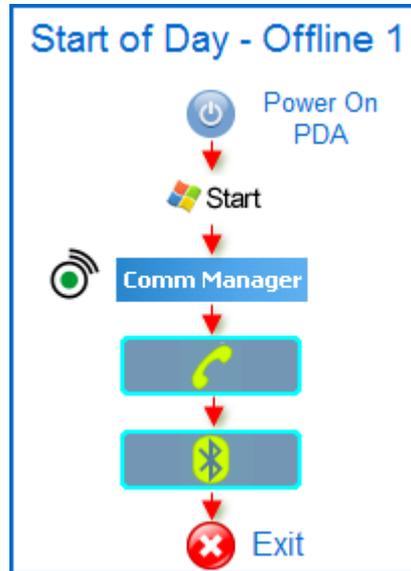
There are fifteen **Pocket RAMM** flowcharts which are used as reminders how to perform simple functions. They are:

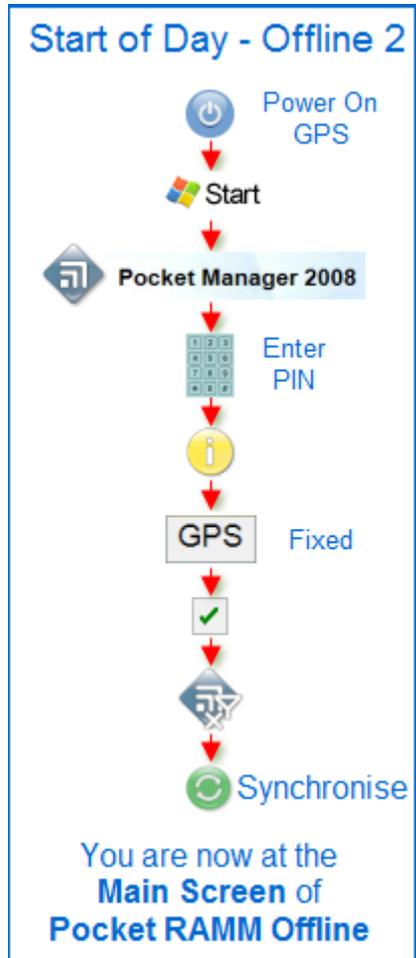
- Flowchart - Rule 1 - Lost - Tap Tool Box (on page 172)
- Flowchart - Online Start of the Day - Step 1 (on page 173)
- Flowchart - Online Start of the Day - Step 2 (on page 174)
- Flowchart - Offline Start of the Day - Step 1 (on page 175)
- Flowchart - Offline Start of the Day - Step 2 (on page 176)
- Flowchart - Online End of the Day - Step 1 (on page 177)
- Flowchart - Online End of the Day - Step 2 (on page 178)
- Flowchart - Offline End of the Day - Step 1 (on page 179)
- Flowchart - Offline End of the Day - Step 2 (on page 180)
- Flowchart - Add Job (on page 181)
- Flowchart - Show Assets (on page 182)
- Flowchart - Duplicate Assets (on page 183)
- Flowchart - Move Asset (on page 184)
- Flowchart - Delete Asset (on page 185)
- Flowchart - Complete Job (on page 186).

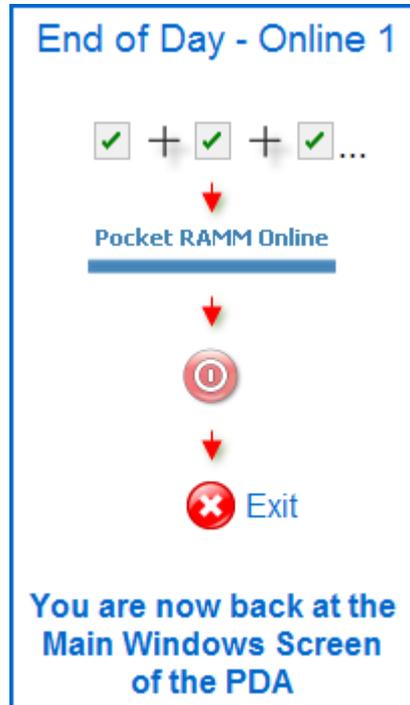


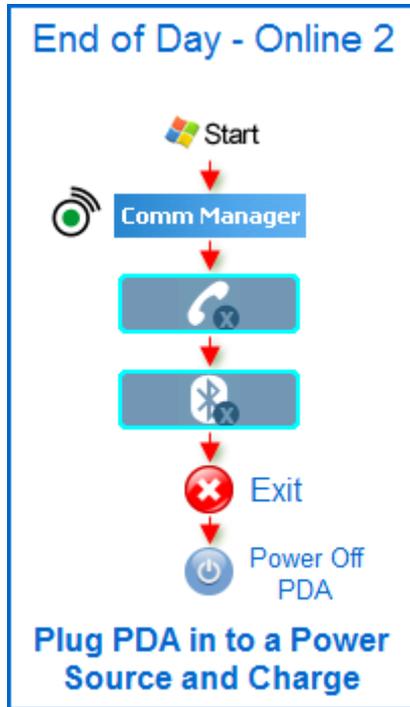


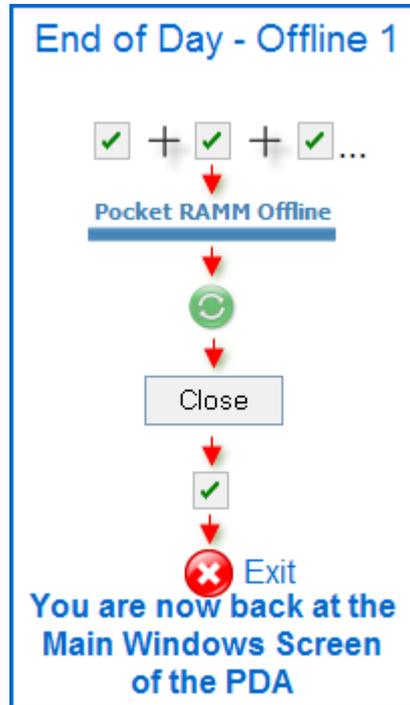


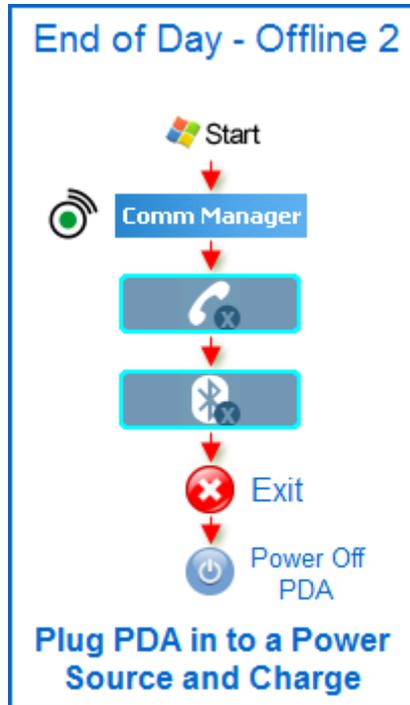


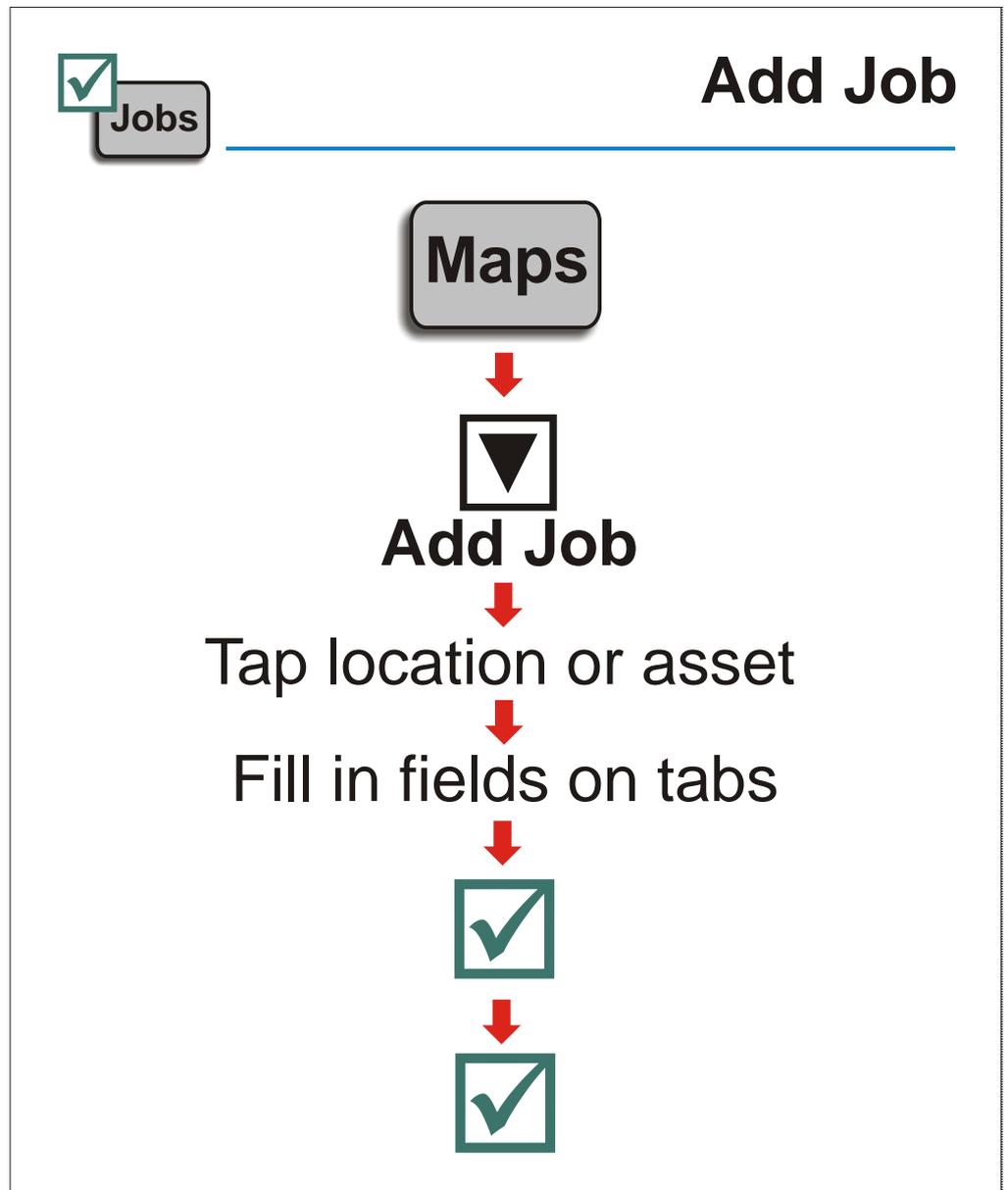


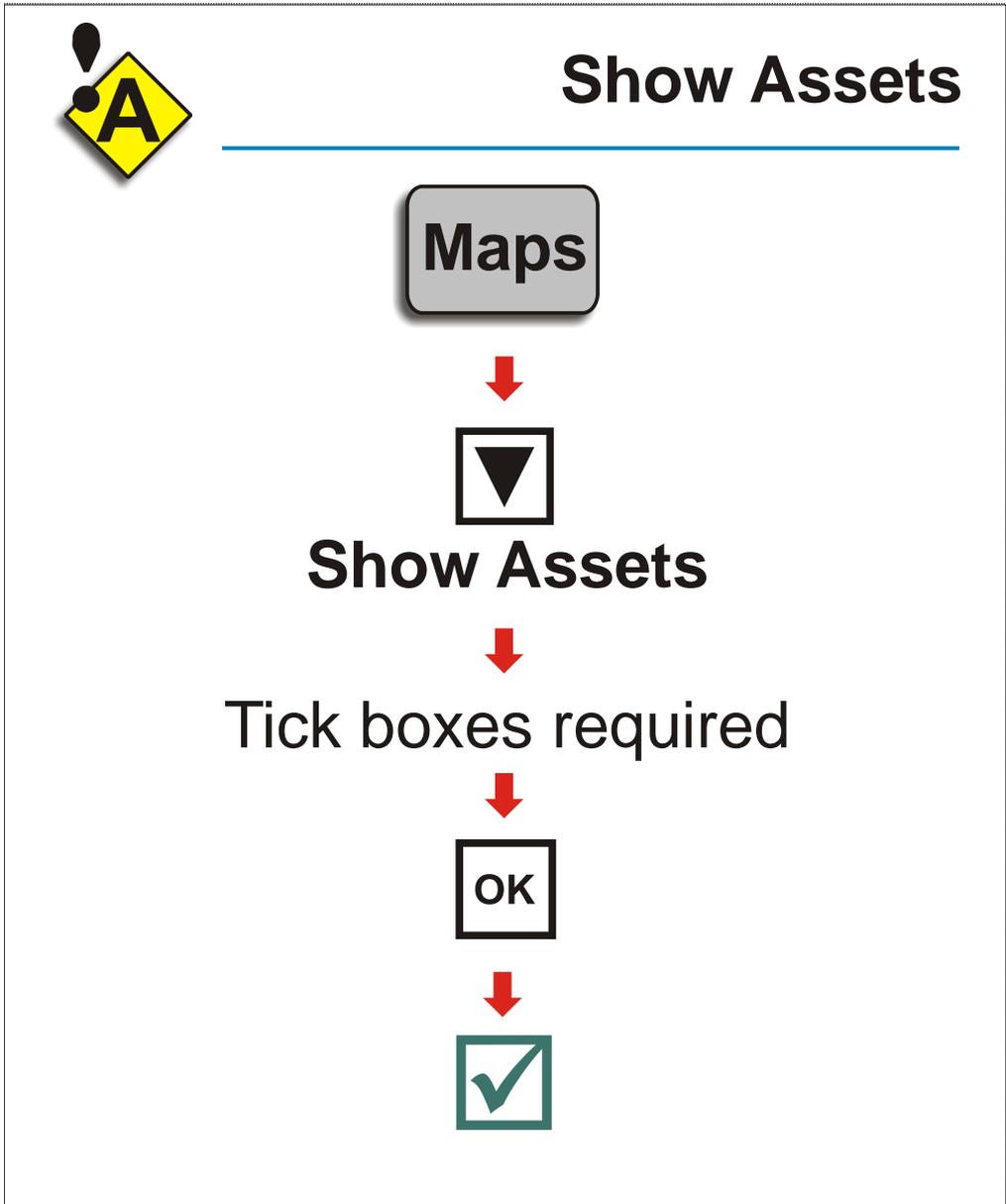














Duplicate Assets

Maps



Duplicate Asset



Tap asset to duplicate

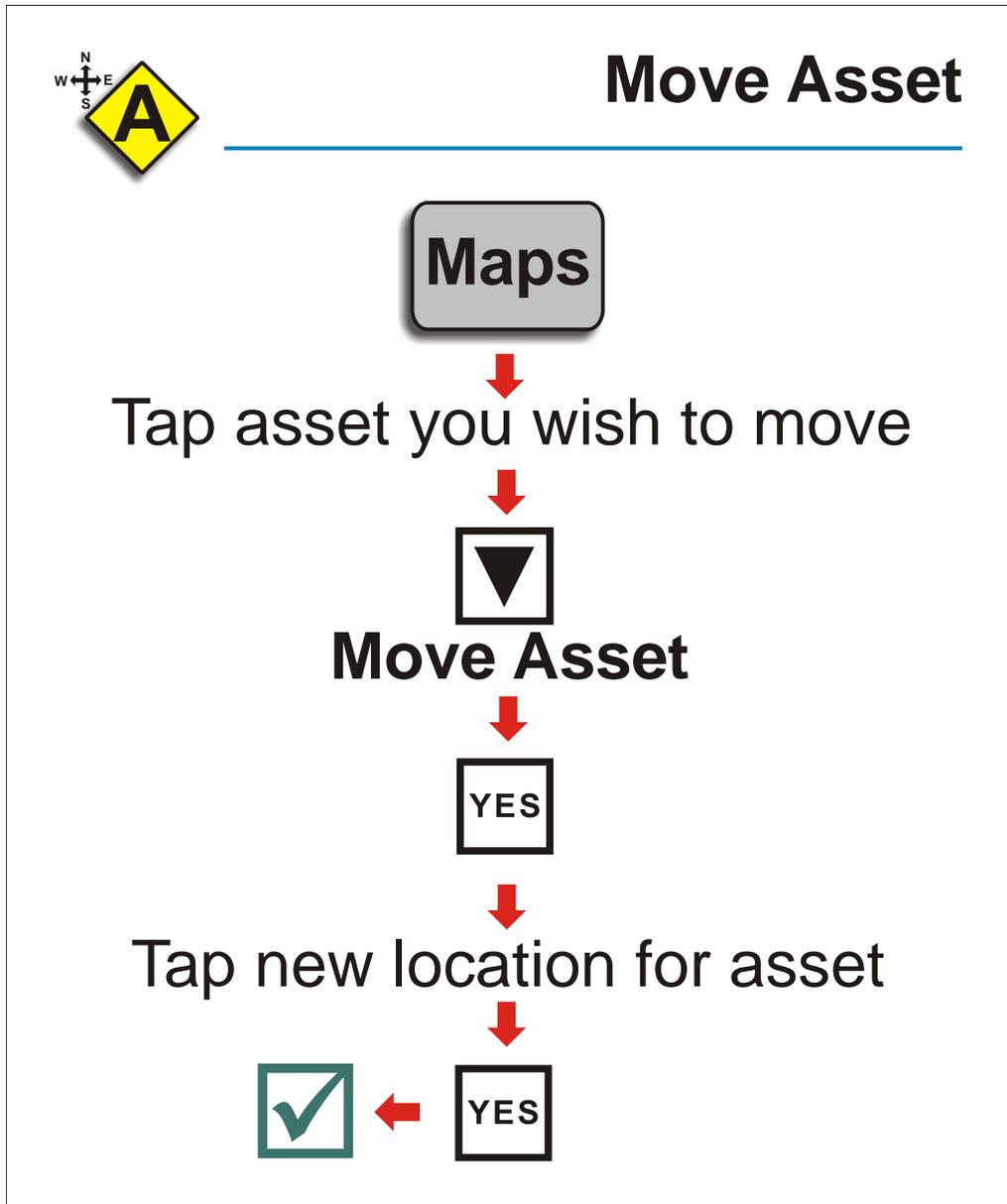


Tap location to place new asset



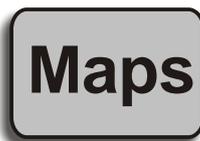
Fill in all fields on all tabs







Delete Assets

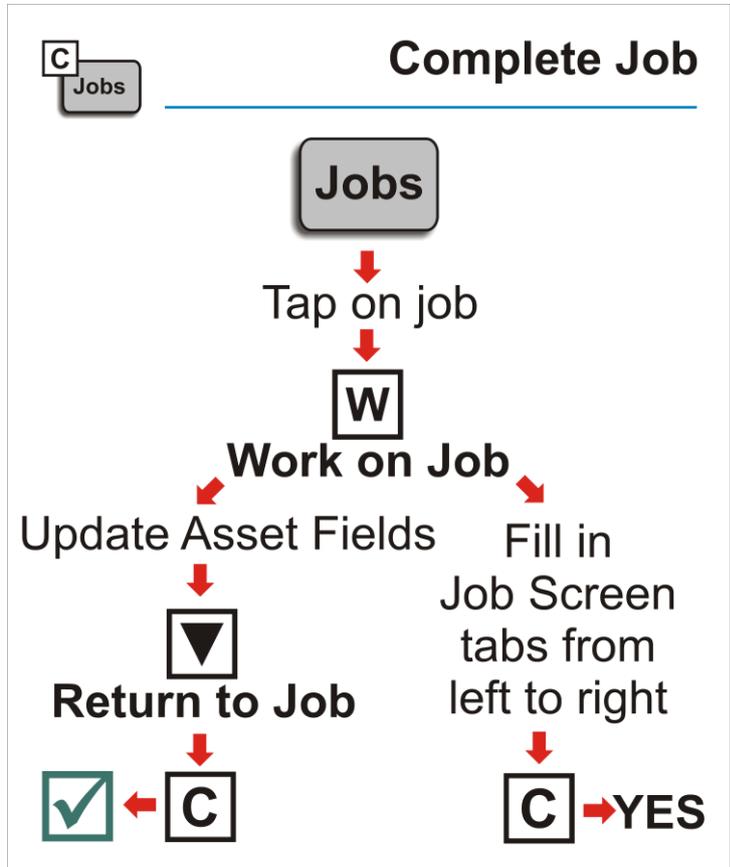


Tap asset you wish to delete



Delete Assets





Appendix Two

RAMM Contractor Flowcharts

There are nine **RAMM Contractor** flowcharts which are used as reminders how to perform simple functions. They are:

- Flowchart - Logging In (on page 188)
- Flowchart - Daily Routine (on page 189)
- Flowchart - Daily Audit Routine (on page 190)
- Flowchart - Adding a Dispatch (on page 191)
- Flowchart - Adding Multimedia (on page 192)
- Flowchart - Pending Lines (on page 193)
- Flowchart - Disputed Claims (on page 194)
- Flowchart - End of Claim Period (on page 195)
- Flowchart - Completing a Claim Header (on page 196).

Logging In to RAMM

 Launch Internet Explorer and open www.cjntech.co.nz

Press 

Type 

If you do not see the icon for the programme you want press **Up** until you see **RAMM 2008**


RAMM 2008

Press  to see  Or the icon for your programme

Press  + select a database if offered 

Select the **Process Flow Chart** you wish to use next

Make sure you are logged into the correct Database

RAMM Contractor Daily Routine



Select the current **Claim Header**



Actions > Claim Review Tool



At the **Claim Review Tool** dialog box set **Analyse by** to **None** and **Exception Threshold (\$)** to **0**



Go to the **Open Claims \$** cell and double click



Go through each **Job Dispatch** and its Claim lines.
Based on their **Maintenance Notes**, either present them or add Claim lines



If it is an Asset Job, press **CTRL+R** to check that the Asset has been updated



If the Claim Lines are fine, present them



Individually

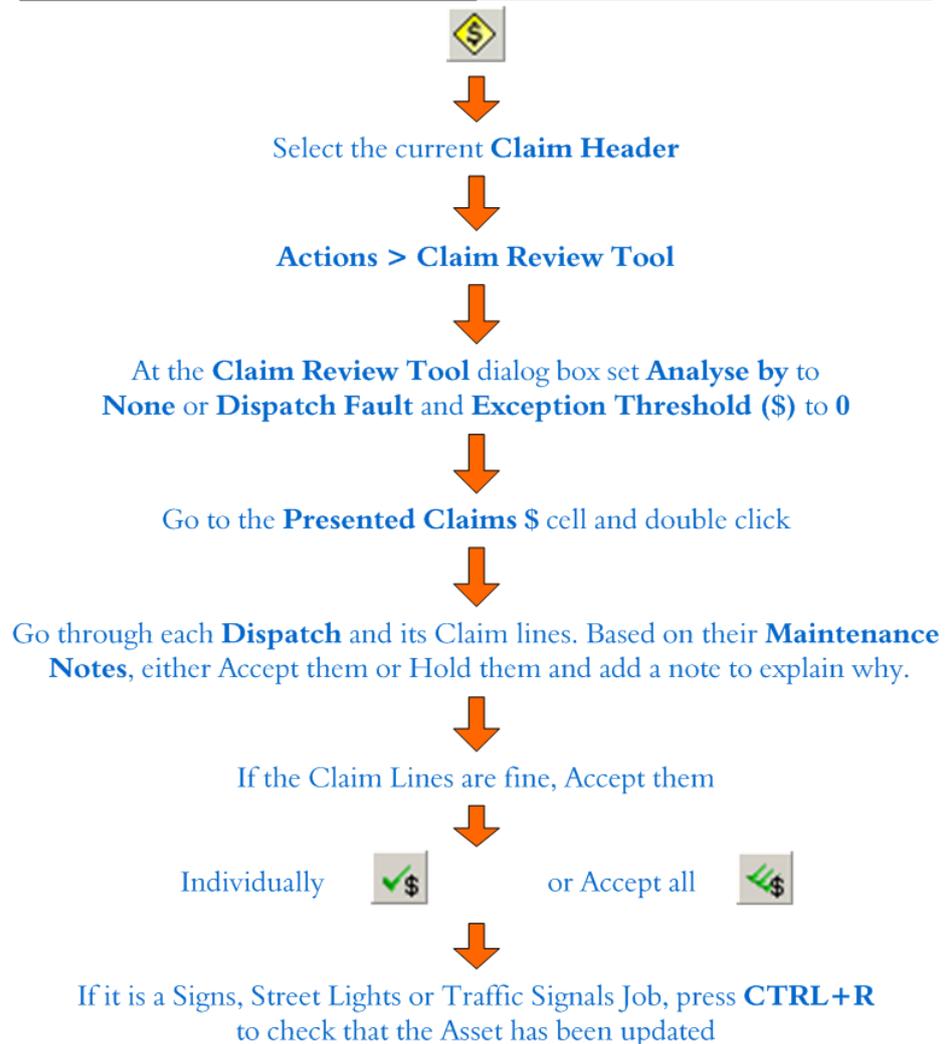


or present all



RAMM Contractor Daily Routine

RAMM Contractor Daily Audit Routine



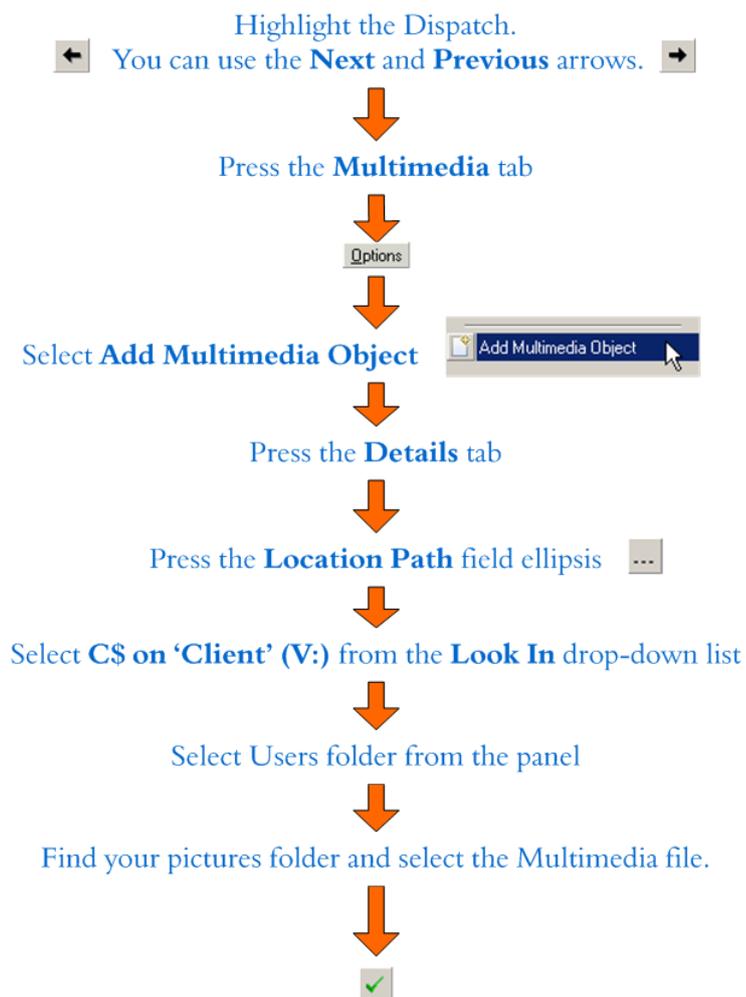
RAMM Contractor Daily Audit Routine

RAMM Contractor Adding a Dispatch



RAMM Contractor Adding a Dispatch

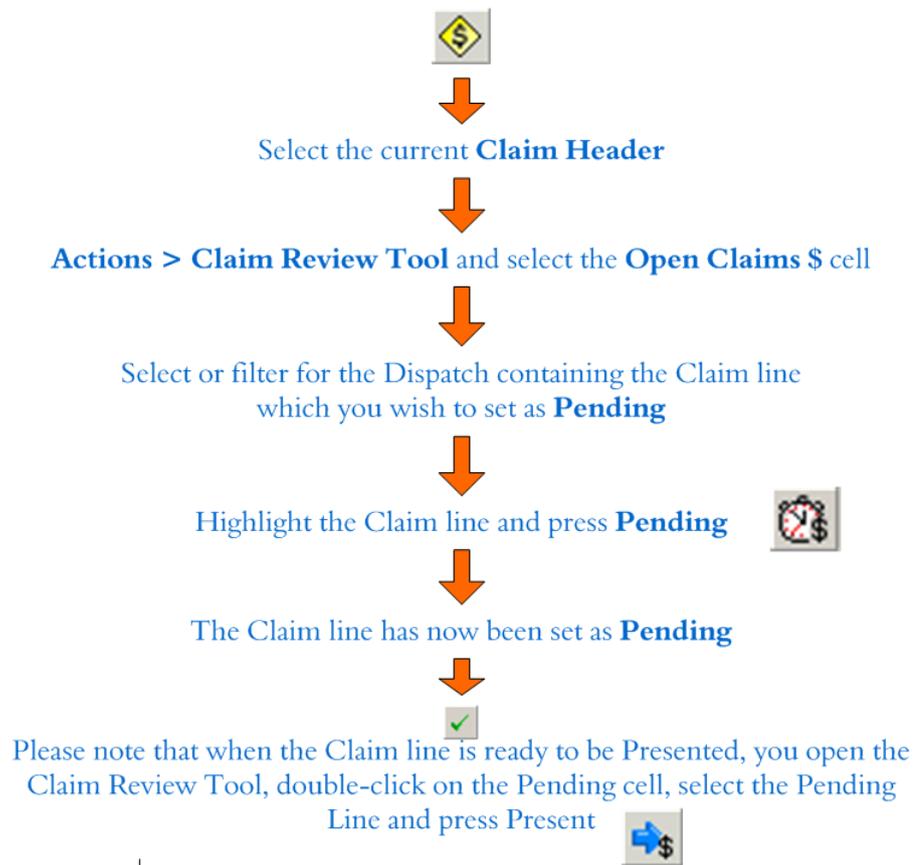
RAMM Contractor Adding Multimedia



RAMM Contractor Adding Multimedia

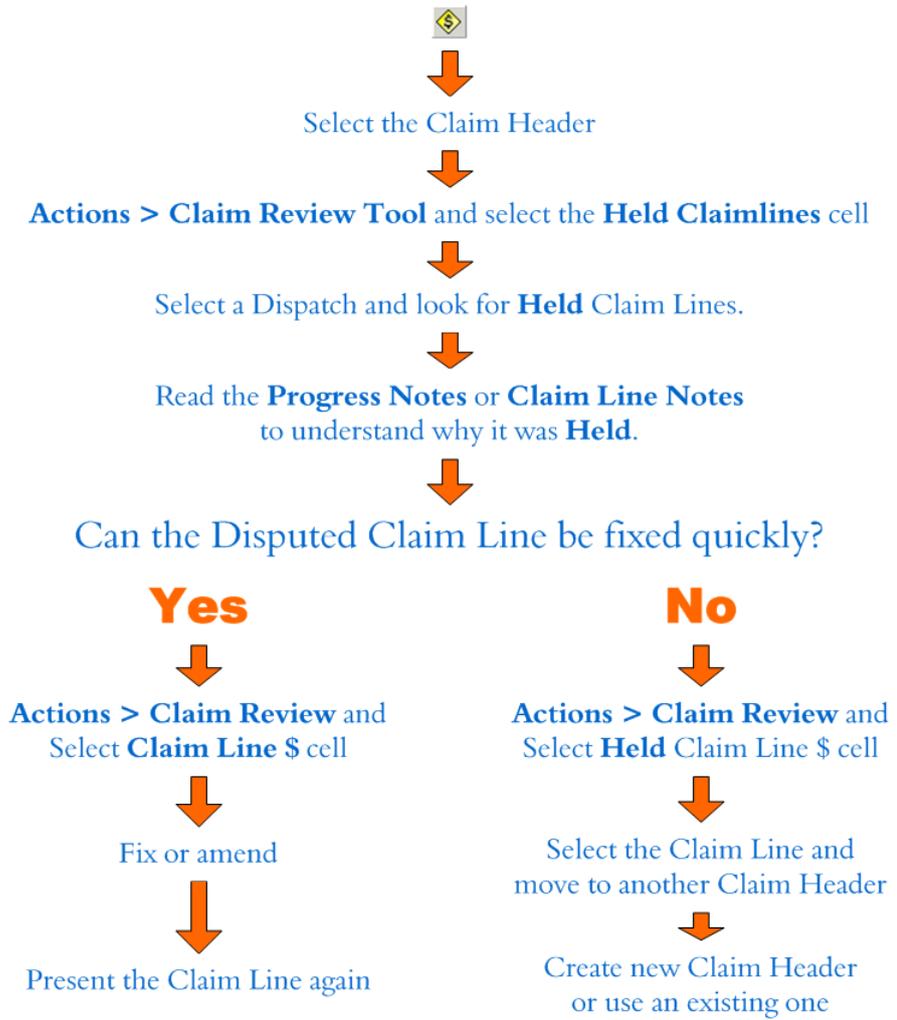
RAMM Contractor Set a Line as Pending

You would perform this procedure when you are unable to charge the cost to the client because you need more information such as when waiting on a third party invoice



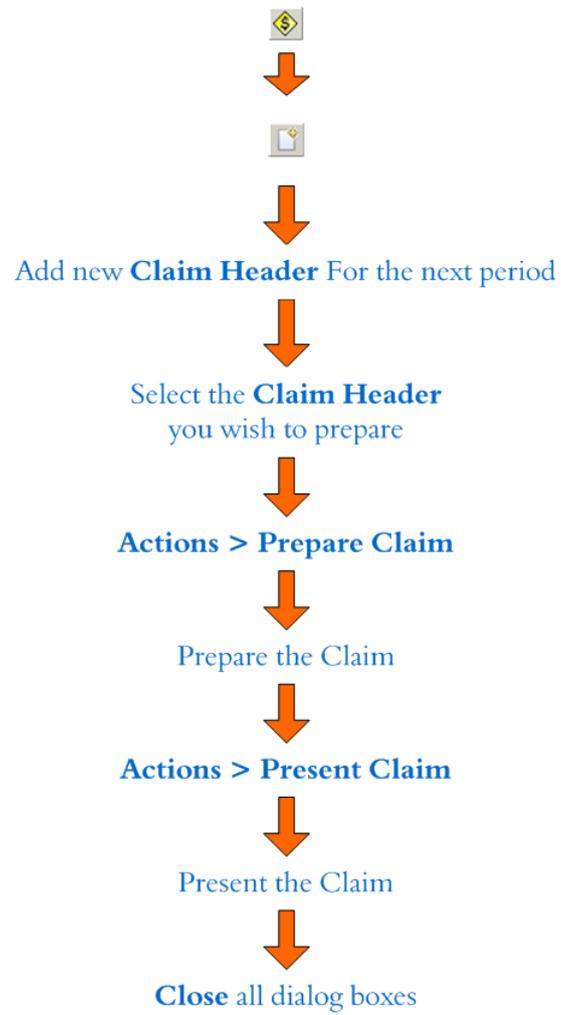
RAMM Contractor Set a Line as Pending

RAMM Contractor Disputed Claim Line

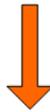


RAMM Contractor Disputed Claim Lines

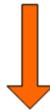
RAMM Contractor Start and End of Claim Period



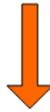
RAMM Contractor Completing Claim Header



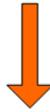
Select the **Claim Header**
you wish to complete



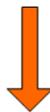
Actions > Complete Claim



Add Payment No



Yes



**Actions >
Transfer to
RAMM Maintenance Cost**

RAMM Contractor Completing Claim Header

Glossary

Account Code

Account codes are **RAMM Contractor** items. They are used for Claim data analysis and reporting. You can set up three Account code lists and define individual codes to match your general ledger codes. You can then export Claim information into your accounting package.

Activity

An Activity code is a **RAMM Contractor** item which represents the activity carried out under the Contract to maintain the Network. Activity codes assist the Network Owner with Network maintenance planning. They are the Maintenance Cost data which is gathered in **RAMM Contractor** to be transferred to **RAMM** Maintenance Costs to show what was done to maintain the Network. Activities are associated with Fault Categories, CSIs or both. For each Activity, you can associate quantity conversion figures which are used to calculate adjusted quantities for Maintenance Costs.

Asset

An Asset is an item in a Network which has a value. It could be a physical component of a Road, such as its Surface. It could be something real such as a Bridge, a Footpath or a

Street Light. Where no table exists in **RAMM** for one of your Asset Types, you set up a User Defined Table (UDT) to manage the Assets.

Asset Type

An Asset is something real which exists in your Network such as a suspension bridge, an oak tree or a neon street light. You group these Assets by Asset Type such as Bridges, Footpaths and Street Lights. It is likely that all the Asset Types you require will exist by default in **RAMM**. If not, you define a UDT to accommodate the Asset Type.

Audit

Audit records are sequential dated information lines which detail changes to Dispatches, Claim lines, Estimate lines, Claim Headers and to the Contract itself. They become an Audit trail. You use this to find out who took certain actions and when they occurred. You decide which Audit records to keep when you are setting up a Contract. Audit records can not be created retroactively.

Carriageway

Roads in **RAMM** are divided into logical sections named Carriageways. These start and end at easily identifiable Locations such as Intersections and Bridges. You can define your Carriageway Sections to suit your own purposes. For instance you may define them to start and end when the number of Lanes in the Road changes or if the Road

changes between Sealed and Unsealed sections.

Claim Header

A Claim Header is a **RAMM Contractor** item used to group Claim lines for a fixed period within a Maintenance Contract. A Contractor uses the Claim Header to Claim payment from a Network Owner for work done in a defined Programme period. A Claim Header must exist for Claim lines to be entered during the Dispatch or Job Completion process.

Claim Line

A Claim line is a record of the maintenance work done on a particular Dispatch or Job. It includes the costs, the crew member name, the Maintenance Costs and other relevant information.

Each Claim line is for an individual CSI. Claim lines are added to Dispatches. A Claim line must always be linked to a Claim Header.

Claim Review Tool

The **RAMM Contractor** Claim Review Tool is a tool to analyse and group Claim lines. It enables a Contractor and a Network Owner to Present, Accept, Hold and Reject Claim lines in bulk. The Contractor and Network Owner should use this Tool at all stages of the Claims process.

Contract

The contract is the document which defines the responsibilities of the Contractor to maintain the Assets of the Network Owner. It specifies the performance standards as well as the remuneration.

Throughout this guide, the actual legal written agreement between the Network Owner and the Contractor is referred to as the *contract* and lower case is used. The item created in **RAMM Contractor** to mirror the original document is referred to as the *Contract* and is capitalised as are all items specific to **RAMM Contractor**.

Contract Item Activities

An Activity code is a **RAMM Contractor** item which represents the activity carried out under the Contract to maintain the Network. Activity codes assist the Network Owner with Network maintenance planning. They are the Maintenance Cost data which is gathered in **RAMM Contractor** to be transferred to **RAMM** Maintenance Costs to show what was done to maintain the Network. Activities are associated with Fault Categories, CSIs or both. For each Activity, you can associate quantity conversion figures which are used to calculate adjusted quantities for Maintenance Costs.

Contract Manager

When a Contract is first set up in **RAMM Contractor**, two users are identified as the Contract Managers.

These users, one for the Contractor and one for the Network Owner, define Staff Permissions to limit and control the actions of the users who run their Contracts. Opening the Contract formalises the restrictions which exclude each of the two Contract Managers from the Contract areas which are the prerogative of the other Contract Manager.

Contractor

The Contractor is the person or organisation which, has won a contract to maintain the Road Assets of a Network Owner. The Contractor Estimates, Programmes, Completes and is paid for Programmed maintenance work on a Road Network.

CSI Headers

CSI (Contract Schedule Item) Headers are **RAMM Contractor** items used by Network Owners to group CSIs. For instance, **Pavement Maintenance** could be a CSI Header under which Potholes, Digouts, Deformation Treatments, and Depression Treatments were grouped.

CSI Headers are used to categorise activities and analyse costs and associated activities over a period of years. They can be used over several contracts at once.

Normally, the Network Owner will set up or select CSIs and limit the available CSI Headers to those relevant only to the Contract. When a CSI Header is added, it becomes

available to all Contracts in the database.

CSIs

A Contract Schedule Item (CSI) is a **RAMM Contractor** item which specifies the charges for a particular maintenance Activity under the Contract. You create them to accurately reflect the contract provisions and use them in the Estimation and Claims process.

It is most important that you create your CSIs to exactly match your actual Contract provisions. For instance, the CSI Item Numbers and Descriptions should exactly match the Contract codes and descriptions. Otherwise reporting and analysis will be impaired.

Cyclic Patrol

These are performed by the Contractor to monitor and report on the condition of the Road Network. They are done to the specification of the Network Owner. Those on patrol identify potholes, detritus and other Faults.

Database

This is a structured collection of data that is stored in a computer so that an application can consult it to answer queries. In **RAMM**, this is a particular Road Network. It is possible that you will use more than one **RAMM** database, especially if you work with more than one Road Controlling Authority.

Decision Cube

This is a context-sensitive **RAMM** pivot table that allows you to view your data in various ways. It also enables you to create reports.

Dispatch

A Dispatch is a defined activity generated from within **RAMM Contractor** so that Contractor field crew can repair a Network Fault. In **Pocket RAMM** it is referred to as a Job.

Dispatch Groups

Dispatch Groups are used to categorise Dispatches. There are Contract Dispatch Groups and Asset Type Dispatch Groups.

Contract Dispatch Groups are used to group Dispatches for analysis and reporting purposes for an individual Contract. You create them only if a standard **RAMM Contractor** function to group the Dispatches does not already exist.

Asset Type Dispatch Groups are used to group Dispatches for a particular Asset Type. They are generally Network Owner options as they are Contract-independent and can be used for a series of Contracts regardless of the Contractor.

Estimate line

An Estimate line is an indication of the cost of maintenance work to be done for a particular Dispatch or

Job. It includes the costs, the Maintenance Costs and other relevant information.

Once this is Accepted by the Network Owner, the Contractor can perform the Job. Each aspect of the Job is entered into **Pocket RAMM** or **RAMM Contractor** as a separately Estimated item or Estimate line.

Each Estimate line is for an individual CSI. Estimate lines are added to Dispatches.

Estimate Review Tool

The **RAMM Contractor** Estimate Review Tool is a tool to analyse and group Estimate lines. It enables a Contractor and a Network Owner to Present, Accept, Hold and Reject Estimate lines in bulk. The Contractor and Network Owner should use this Tool at all stages of the Estimation process.

External ID

An External ID is a reference from an external source. You record this when adding a Dispatch. It is the form of identification used by the person or organisation which reported the Fault. You type the External ID details into the fields on the Misc tab of the **Dispatch** maintenance screen for those Dispatches where you may want to refer to the records of an external organisation, or where they may need to enquire into your records.

Fault

A Fault code is a **RAMM Contractor** item which identifies the weakness or defect in the Network Inventory item which gave rise to the need for maintenance. Fault codes assist the Network Owner with Network maintenance planning. They show what was repaired when the Activities were undertaken. Fault code data is gathered and grouped in **RAMM Contractor** to be transferred to **RAMM Maintenance Costs**. Fault codes are associated with CSIs, Dispatch Fault Categories or both. The actual Fault giving rise to the Dispatch (as opposed to the Maintenance Cost Fault) is referred to as a Fault Category.

Fault Category

A Fault Category code is a **RAMM Contractor** item which is used in Dispatches to be a description of the weakness or defect in the Asset which gave rise to the need for maintenance. It describes an actual Fault or problem which has occurred on the Road Network, or some work that needs to be done. This could be Flickering Lamp or Light Out for a Street Light contract, for example.

Every Dispatch must have an associated Fault Category.

The Fault Category code used in Dispatches is different from the Fault code used in Maintenance Costs.

Filter (Database Filter, Grid Filter)

Filters are the screens which you use to sort the data in Detail or Grid screens according to selected criteria. You use these to streamline the information you see in **RAMM** such as in the Roads list panel.

Job

A Job is a defined activity generated from within **Pocket RAMM** so that Contractor field crew can repair a Network Fault. In **RAMM Contractor** it is referred to as a Dispatch.

KPI

Key Performance Indicators (KPIs) are metrics used to help the Contractor and Network Owner define and measure progress toward organisational goals.

The Network Owner may have included KPIs in the provisions of the contract. If so, Response Time parameters can be set up so that Contractor performance can be measured against preset standards.

On the Audit tab of the **Dispatch** screen there is a Response Time section. If you enable Response Times and set up Targets, every Dispatch will have Response Time information stored against it. This information can be viewed at the Response Time section of the screen.

Location

Location refers to the collection of details used to position an Asset or

Inventory item within a database. The most basic Location information is a combination of Road and Displacement. Location information can also include helpful notes such as nearby landmarks. Point Assets such as Signs have a Location field whose value is the Displacement of the Sign from the start of the Road.

Location Job (Location Dispatch)

Jobs (or dispatches) that are not associated with an asset.

Lookup

A Lookup is a set of column values which is selectable from a drop-down list in **RAMM** screens. Lookups are defined either by **RAMM Software Limited** or by the user. For example, in **RAMM Contractor** you may enter a Lookup record on the Priority tab of the **Contract** Detail screen. This record then becomes one of the items you can select in the drop-down list for the Priority field of the **Dispatch** maintenance screen.

Lump Sum Item

These are fixed amount items for works such as Patrols or Pothole Repairs which are performed on a regular basis. So they are often monthly charges. When a Contractor creates, Prepares or Presents a Claim Header, there is the option to create Lump Sum Claim lines for the Claim Period if this has not already been done. When you set up your Schedule

Items, you may define them as Lump Sum items.

Maintenance Cost

See Maintenance Activity

Maintenance Programme

This is the Programme of works to maintain a Road Network. The Network Owner normally engages a Contractor to locate and repair Network Faults. The Contractor gives regular Programme Estimates for the Network Owner to Approve prior to performing the maintenance work in the Programme period for which payment is Claimed.

Network

A Network is a collection of Roads managed by a particular Road Controlling Authority (RCA). Each **RAMM** database usually contains all the information for one Network.

Network Management Consultant

This is the person or group that represents the Network Owner in dealings with the Contractor if the Network Owner prefers a third party to be responsible for a Network Management Area.

Network Owner

This is the Organisation that controls the Road Network. They devise and let the Maintenance Contract. They Approve, Hold or Reject the Estimated Programme of Road Maintenance works, audit the works

once Completed and pay for the work once done.

Offline

Pocket RAMM users will sometimes work Offline. This is where they work without being connected to the mobile broadband network.

Users work Offline when they are not in a mobile broadband coverage area. They might also do this when they are in an area of weak network coverage and are constantly being disconnected, or when the network speed is slow because of network reception problems.

On-cost

A Contractor and a Network Owner may agree that the Contractor can charge the Network Owner a specified amount or percentage over and above the actual cost of purchase for Contract Schedule Items (CSIs). For example they may agree that the Contractor may charge the actual cost of replacement Signs plus ten percent for transport and administration. This extra charge is referred to as On-cost in **RAMM** and **Pocket RAMM**.

Patrol

A Patrol is a scheduled traverse of a specific geographical area of the Network. The Contractor performs Patrols at the direction of the Network Owner. The Contractor monitors and reports on the condition of the Road Network and

associated Assets. There are also Road Sweeping and Drain Inspection Patrols.

Patrol Header

Patrol Headers are **RAMM Contractor** items to group Patrols. Their descriptions should match the actual Lump Sum item descriptions in the contract with the Network Owner. Then when **Pocket RAMM** users add Jobs, they can be associated with a particular Patrol as defined in the contract.

You set up Patrol Headers to enable the Network Owner and the Contractor to audit the Patrol process.

PDA

The Personal Digital Assistant (PDA) was the electronic handheld device on which **Pocket RAMM** used to run before **Pocket RAMM** became too feature-rich for its limitations. Older versions of **Pocket RAMM** may still run on PDAs.

Pocket RAMM

Pocket RAMM is the module of the **RAMM** suite of products which enables a user to run **RAMM** on a netbook, laptop, tablet or PDA, and to perform Contract, Inventory and Claim management while mobile, in the field. Virtually all of the everyday maintenance ability of **RAMM Contractor** is present in **Pocket RAMM**. Please note that the **Pocket RAMM** application has become so

comprehensive that the use of PDAs with **Pocket RAMM** is no longer recommended. PDAs are no longer powerful enough to deliver a positive user experience.

Priority

Priority codes are **RAMM Contractor** items associated with Dispatches. Priority codes help **RAMM Contractor** Staff who Programme and assign Dispatches and **Pocket RAMM** users who self-assign Jobs to tell which should be performed first. You can also use Priority codes to ensure emergencies stand out from all other Dispatches regardless of Priority. Each Dispatch or Job must have an associated Priority code.

Programme

A maintenance Programme is the agreed maintenance works to be carried out by a Contractor during the Programme period. This is usually one month.

Progress Note

A Progress Note is a record of a change which has occurred to a Dispatch. These are manually entered by a user. You would do this to record long term work progress on a particular Dispatch. You would use them for complex situations where, for example, you are unable to progress with the Dispatch because you are waiting for supplies.

These notes are added in the normal manner and are not Audit records which are automatically generated

by **RAMM Contractor** if the Contract has been set up for this.

RAMM

Road Assessment and Maintenance Management (**RAMM**) is software developed and supported by **RAMM Software Limited**. This software is used by Road Controlling Authorities (RCAs) to manage Road Inventory Assets and Condition for their Network.

RAMM Contractor

RAMM Contractor is the module of the **RAMM** suite of products which enables Contractors, Network Owners and Consultants to manage Road Asset Maintenance Contracts. In particular, it has been optimised to facilitate the Programming of Network maintenance and the Estimation and Claims process which is integral to Programmed Maintenance Contracts. It also includes the special features for the managing of Contracts for Signs, Street Lights and Traffic Signals maintenance.

RAMM Hosting Service

The **RAMM Hosting Service** is a service run by **RAMM Software Limited**. It enables you to run **RAMM** across the Internet. It hosts your database and the software on a server at a centralised location. You use your standard internet browser to access the software and work with your

data, so you do not need any specialised software. It is very secure.

RAMM Software Ltd

This is the company which specialises in the development of software for the roading industry. Its core product, **RAMM** (Road Assessment and Maintenance Management) has been the benchmark in road asset management software in New Zealand for over 20 years. **RAMM** is now a suite of software products including **RAMM Contractor**, **Pocket RAMM**, **RAMM SQL**, **RAMM Manager**, **RAMM Network Manager** and the **RAMM CAR Manager**.

Response Time

The Contractor and the Network Owner both have an interest in the time it takes from when a Dispatch is added to **RAMM Contractor** to when it is Assigned and Completed. If the contract with the Network Owner requires performance to certain Response Times, these are set up in the Contract.

This enables Contractor performance to be measured against preset standards.

On the Audit tab of the **Dispatch** screen there is a Response Time section. If you enable Response Times and set up Targets, every Dispatch will have Response Time information stored against it. This information can be viewed at the Response Time section of the screen.

Schedule Items

A Contract Schedule Item (CSI) is a **RAMM Contractor** item which specifies the charges for a particular maintenance Activity under the Contract. You create them to accurately reflect the contract provisions and use them in the Estimation and Claims process.

It is most important that you create your CSIs to exactly match your actual Contract provisions. For instance, the CSI Item Numbers and Descriptions should exactly match the Contract codes and descriptions. Otherwise reporting and analysis will be impaired.

Staff Permissions

Staff Permissions are access rights granted to specific users and groups of users. They are authorisations for users to view or maintain specific aspects of **RAMM**. You set Staff Permissions for users, firstly, to manage their access to **RAMM** and, secondly, once they have accessed **RAMM**, to limit their actions to those which they need in order to perform their normal work activities.

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