

RAMM Contractor

Release Version: 30th September 2011
RAMM Software Ltd
Auckland
NEW ZEALAND

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Document Release

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Author	Version	Release Date
Grant Mackenzie	First Edition release for RAMM 2008.	1st July 2008
Grant Mackenzie	Second Edition release for WALGA.	28th March 2011
Grant Mackenzie	Third Edition. This includes RAMM Patrol, Maintenance Costs, On-cost and Cost Escalation updates.	30th September, 2011

**NOTE**

Please note that not all of the enhancements that have been made to **RAMM Contractor** for **RAMM 2011** are reflected in this manual.

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Introduction to RAMM Contractor

RAMM Contractor is one of the suite of **RAMM** products created and maintained by **RAMM Software Limited**.

It is designed to enable 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.

This guide shows you how to set up a Contract in **RAMM Contractor** which matches the provisions of the contract between a Contractor and a Network Owner. It also introduces the screens and reports you will use to run the Contract.

Once you have set up the Contract in **RAMM Contractor** and made yourself familiar with the screens and reports, you should read the *RAMM Contractor Best Practice* guide. This guide demonstrates clearly how a Contractor and a Network Owner can both use **RAMM Contractor** to their mutual advantage.

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Audience

This **RAMM Contractor** guide is for Contractors, Network Owners, Consultants and their staff who set up and manage Contracts for Road Asset Maintenance.

As it is the Contractor generally who actually sets up the Contract in **RAMM Contractor** it is to the Contractor that this guide is mostly addressed. However, the information herein is of interest and use to all parties to a contract.

The guide contains:

- a full description of how to set up a Contract in **RAMM Contractor**
- a brief description of how to create Dispatches, Programmes, Estimates and Claims
- a full description of a selection of useful reports.

Set Up and Manage the Contract

Those **RAMM Contractor** users who play no part in the setting up of a Contract will still find it useful to read this guide to see how all the constituent components of a Contract fit together in **RAMM Contractor** and how to adjust them if necessary.



NOTE

Each of the parties to the Contract needs to access the database. This is best achieved by using the **RAMM** Hosting Service.

It is assumed that the readers of this manual are using the **RAMM** Hosting Service. If you are not using this service, then you may find your results differ from those described here.

If this occurs, Contact RAMM Software Limited (on page 26).

Related Guides

There are several guides related to **RAMM Contractor** which you should consider reading.

RAMM Best Practice 2008

This guide is where you will find how Contractors and Network Owners can manage their Road Network Maintenance Programme, Dayworks and audit requirements in the most efficient and productive manner. **RAMM**, **RAMM Contractor** and **Pocket RAMM** have been designed as the fully integrated Road Asset Management Maintenance solution. Contractors and the Network Owners who use best practice as outlined in this guide will achieve the highest level of control, certainty and efficiency.

Street Lights, Signs and Traffic Signals

These three Asset Types are fundamentally different from all the other **RAMM** Asset Types and so have their own guides. So whereas, you use the *RAMM Contractor* guide to set up and run a Contract for their maintenance, if you want to know how to set up and maintain the Assets themselves, you need to read the guides specific to these Asset Types.

At the time of writing the *Traffic Signals* guide is available but the *RAMM Signs* guide and the *RAMM Street Lights* guide have not been written.

For a list of **RAMM** guides see **RAMM** Guides and Manuals (on page 23).

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



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

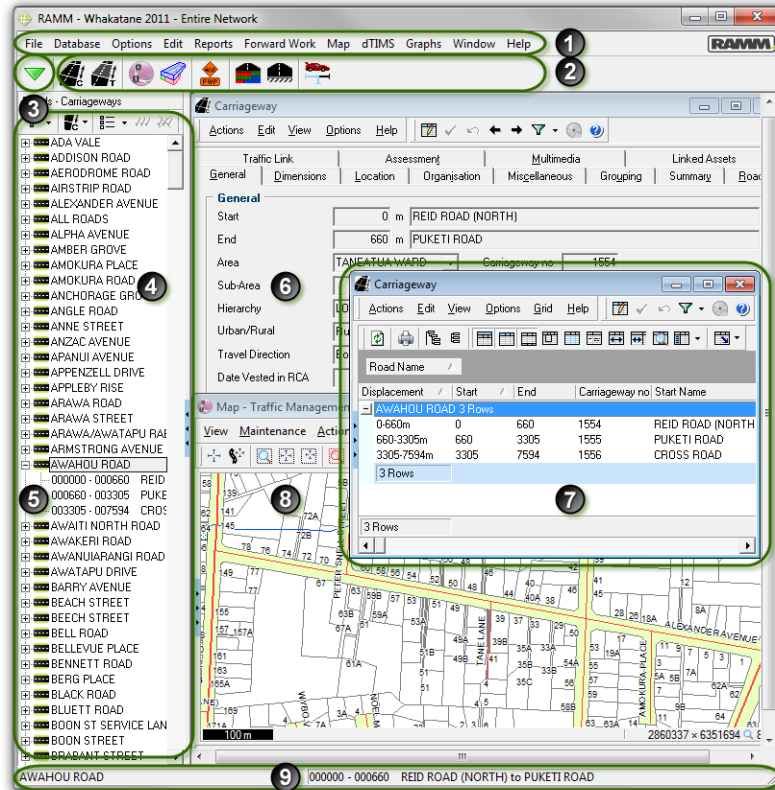
Deighton Total Infrastructure Management System (dTIMS) is a software tool used to model Pavement Deterioration. **RAMM** provides a method of extracting Treatment Length, Maintenance Cost and related data from the Road Network in a format that can be imported into dTIMS. You export information from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

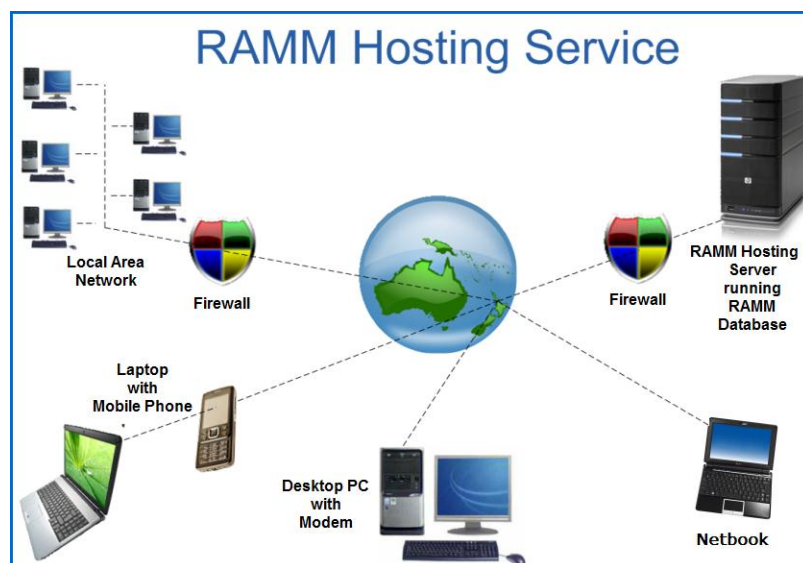
You log in to **RAMM** using the **RAMM Hosting Service**.

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:

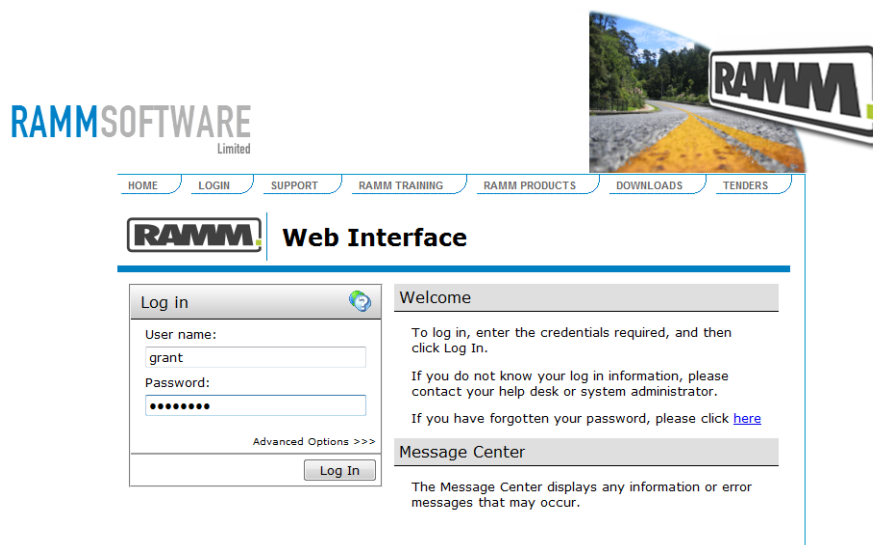
- been granted access with a username and password by **RAMM Software Limited**. To contact **RAMM Software Limited** for assistance, see Contact **RAMM Software Limited** (on page 26).

- 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

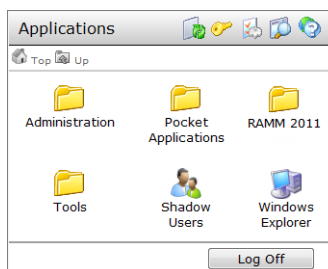
Follow the menu path [ramm.co.nz https://login.ramm.co.nz/](https://login.ramm.co.nz/) to open the **Log in** page.

► 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**.

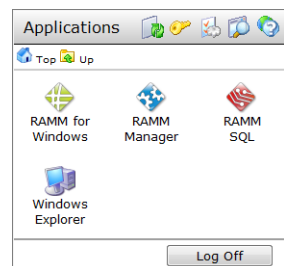


The icons you see in the **Applications** panel will depend on your **Staff Permissions**

- 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.

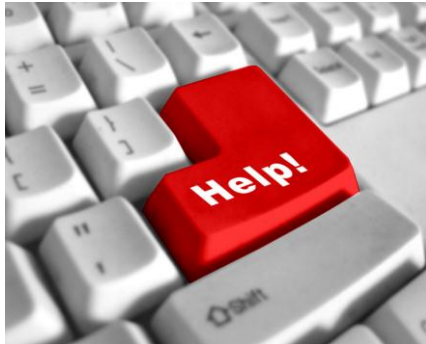


If you use an older version of Mozilla Firefox as your internet browser, a **Warning** telling you that you do not have the MetaFrame Presentation Server Client for 32-bit Windows will display as in the **Log in** page screen shot above. Once you have downloaded the software you can ignore this warning.

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).



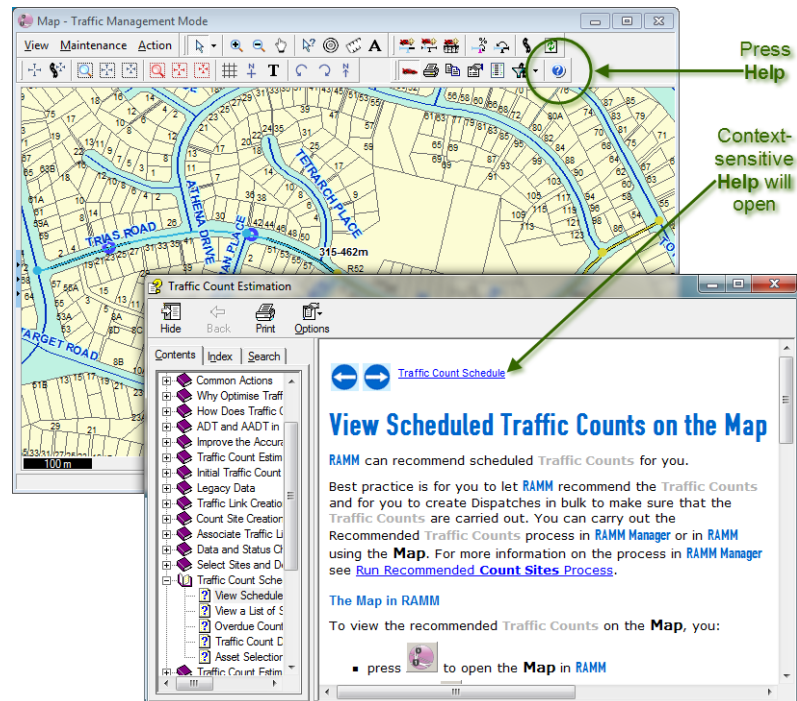
Context-sensitive Help

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

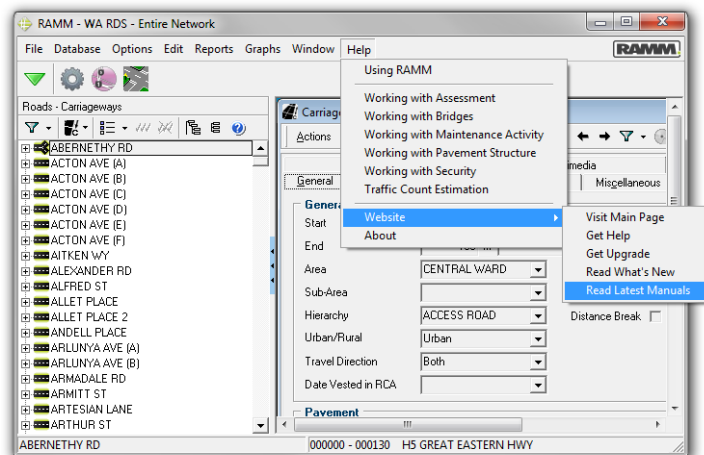
Most screens in **RAMM** have a Help  menu option. You press F1 on your keyboard or press Help  at the top of the screen to open the context-sensitive Help.

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 Rooding 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.

Table	Description	System	Page
address	Road address 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
carriway	Carriageway 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 Carriageway	Core	11
oway_group_1	Optional Carriageway Group 1 lookup table	Core	11
oway_group_2	Optional Carriageway Group 2 lookup table	Core	11
oway_group_3	Optional Carriageway Group 3 lookup table	Core	12
rdi_values	The RAMM Construction Index etc. for B/C calculation during T/S	Core	17
rom_action	Actions for a Road Names Carriageway session	Core	18
rom_session	Header for a Road Names Carriageway 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

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>).

Phone

+ 64 9 475 0500

0800 256 832 from within New Zealand only

1800 196 213 from within Australia only

Fax

+ 64 9 475 0501

Postal Address

PO Box 302 278
North Harbour
Auckland 0751
New Zealand

Physical Address

102 Rosedale Road
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 Contracts

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.

You set up a Contract in **RAMM Contractor** to mirror the contract signed by the two parties. You then use **RAMM Contractor** to manage the running of the Maintenance Contract.



NOTE

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**. The expression *Maintenance Contract* is always capitalised as it is a proper noun.

In This Chapter

Contract Set Up	30
Contract Set Up Process	30

Contract Set Up

The database for the Contract is the property of the Network Owner.

Once [RAMM Software Limited](#) have received authorisation from the Network Owner that the Contractor is to be granted access to the relevant database, the [RAMM Software Limited](#) staff can do the required set up to allow the Contractor to add the Contract in [RAMM Contractor](#). The level of access will depend on the role of the Contractor. [RAMM Software Limited](#) will limit access as per the specifications of the Network Owner.

The Contract Manager is normally the person who adds the Contract in [RAMM Contractor](#). [RAMM Software Limited](#) staff need to add the Contract Manager to the database with the relevant permissions, username and password. Similarly, the Contractor staff need to be added with usernames and passwords. Usually these staff will be added with **View Only Staff Permissions**. The Contract Manager then assigns them the correct level of access during the process of adding the Contract.

So before adding a Contract, the Contractor needs to advise [RAMM Software Limited](#) of the names of the staff members who will need access to **Pocket RAMM** and to [RAMM Contractor](#).



Most Contracts in [RAMM Contractor](#) are set up with the assistance of [RAMM Software Limited](#) staff. When required, [RAMM Software Limited](#) sets up the Contract to the specifications of the Contractor and charges fees for this service.

The Contractor sets up a Contract in [RAMM Contractor](#) to reflect the actual contract signed with the Network Owner. You do this using the [RAMM Hosting Service](#).

Contract Set Up Process

This is the sequential list of steps to follow when you set up a Contract in [RAMM Contractor](#). Some, such as step four, are mandatory and must be carried out regardless of the Contract type. Others, such as step five, will almost never have to be carried out. Whether or not you need to carry out a particular step will either be indicated in the information accompanying the step or determined by the provisions of the contract with the Network Owner.

You follow the steps in the order as below. This is to make sure that all the prerequisites for each individual procedure have been carried out before you attempt it.

Follow these steps to set up a Contract.

Step	Action	Comments
1	Win the contract.	The Contractor who wins the contract will need a copy of the contract to which to refer when adding the Contract to RAMM Contractor .
2	The Network Owner and the Contractor need to send relevant staff details to RAMM Software Limited .	<p>The Network Owner needs to authorise RAMM Software Limited to give the Contractor access to the relevant database Security Zones.</p> <p>The Network Owner or the Contractor need to give RAMM Software Limited the names of the Contractor staff so they can be set up with usernames, passwords and View Only access for the RAMM Hosting Service.</p> <p>In particular, the name of the Contract Manager must be given so that this person can have the appropriate Staff Permissions.</p>
3	Log in to RAMM Contractor using the RAMM Hosting Service .	<p>The Contract Manager will have the Staff Permissions to add a Contract in RAMM Contractor. They can also assign the correct Staff Permissions to each individual staff member.</p> <p>You do this using an internet browser. See Logging in to the RAMM Hosting Service (on page 17).</p>
4	Define the Contract name and select the Security Zone.	<p>The name of the Contract in RAMM Contractor should match the actual name of the contract with the Network Owner.</p> <p>You do this at the Contract Details screen. See Adding Initial Contract Details (on page 45).</p>
5	You may have to add Organisation codes if you are not using the RAMM Hosting Service .	<p>Organisations in RAMM Contractor are the parties to the Contract such as the Network Owner, the Contractor and Subcontractors. You use Organisation codes when adding initial Contract details, adding staff and granting Staff Permissions.</p> <p>You add Organisation codes at the Organisation Code maintenance screen. See Adding an Organisation Code (on page 42).</p>

Step	Action	Comments
6	Define the initial Contract details.	<p>When you add a Contract in RAMM Contractor you define it to mirror the actual Maintenance Contract you have with the Network Owner. So the name and other details of the Maintenance Contract should be the same as in the Contract in RAMM Contractor.</p> <p>You define the initial Contract details at the General tab on the Contract Details screen. See Adding Initial Contract Details (on page 45).</p>
7	Select the Contract Asset Types.	<p>You can not save a RAMM Contractor Contract unless you have selected at least one Asset Type. You can select more than one if required.</p> <p>You do this at the Add Asset Types dialog. See Selecting Contract Asset Types (on page 53).</p>
8	Add CSI Headers (Contract Schedule Item Headers).	<p>A Network Owner may use CSI Headers to group Contract Schedule Items for analysis and reporting purposes. A Contractor would add CSI Headers under the direction of the Network Owner. The Network Owner performs this procedure.</p> <p>You add CSI Headers at the CSI Headers maintenance screen. See Adding CSI Headers (on page 59).</p>
9	Select relevant CSI Headers.	<p>A Network Owner may use CSI Headers to group Schedule Items for analysis and reporting purposes. Normally, the Network Owner would select the CSI Headers appropriate to the Contract. A Contract Manager might select the CSI Headers for the Contract, but only under the instruction of the Network Owner.</p> <p>You select CSI Headers at the Activities tab on the Claims tab of the Contract Details maintenance screen. See Selecting CSI Headers (on page 60).</p>
10	Manage Maintenance Costs. You do this with the Network Owner Maintenance Cost specialist Asset Management Team.	<p>Maintenance Costs are used by the Network Owner to analyse the Network. They are also used in the export to dTIMS for pavement deterioration modelling. In particular, Cost Group, Activity and Fault values are used for this purpose.</p> <p>The Maintenance Cost codes and lookups are likely to already exist in the database when a Contract is added. If not, the Network Owner will usually add</p>

Step	Action	Comments
		<p>them. If the Contractor adds them it would be under the direction of the Network Owner.</p> <p>See Introduction to Maintenance Costs (on page 64).</p>
11	Add Asset Type Dispatch Groups.	<p>Asset Type Groups are user-configurable groups which you set up so that you can analyse Dispatches or Claim Lines for the same Asset Type. 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.</p> <p>You do this at the Dispatch Group (Asset Type) screen. See Adding a Dispatch Group (on page 92).</p>
12	Add Asset Type Claim Groups.	<p>Asset Type Claim Groups are used to group Claim lines 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.</p> <p>You do this at the Claim Group (Asset Type) screen. See Adding a Claim Group (on page 95).</p>
13	Add Dispatch Call Types.	<p>You create Call Types to identify the source of Fault reports. This can assist with Dispatch priority. It also enables analysis of Fault reporting. Call Types are specific to each Asset Type as the range of sources of Fault reports is likely to vary by Asset Type.</p> <p>You add Dispatch Call Types at the Call Types maintenance screen. See Adding Dispatch Call Types (on page 102).</p>
14	Add Event codes.	<p>An Event code is a RAMM Contractor item. You create and use them to make tracking Dispatch progress standard and readily understandable. Event codes can be an internal user-defined set to ensure consistency and comprehensibility or may be specified in the contract with the Network Owner. You can filter by Event code.</p> <p>You add Event codes at the Event Codes maintenance screen. See Adding Progress Note Event Codes (on page 106).</p>
15	Define Dispatch Fault	You create Fault Categories so the reason for a

Step	Action	Comments
	Categories.	<p>Dispatch is clear. Dispatches are created so that Faults can be repaired. So before you can create a Dispatch, you must have created the appropriate Fault Category.</p> <p>You add Dispatch Fault Categories at the Fault Categories maintenance screen. See Defining Dispatch Fault Categories (on page 109).</p>
16	Add staff to the Contract.	<p>You manage access to RAMM Contractor by setting Staff Permissions. You do this to limit the actions of users to those areas of RAMM Contractor to which they need access in order to be able to perform their normal work tasks.</p> <p>You do this at the Staff Permissions maintenance screen. See Adding Staff to a Contract (on page 118).</p>
17	Assign users to Security Groups.	<p>Assigning a user to a Security Group sets the database access level for the user. Security Groups are preset and you can not change them.</p> <p>You do this at the Staff Permissions maintenance screen. See Assigning a User to a Security Group (on page 122).</p>
18	Set Custom Security Permissions for users.	<p>Assigning a user to a Security Group sets the database access level for the user. You can modify Permissions for individual users if required once the user has been assigned to a Group.</p> <p>You do this at the Staff Permissions maintenance screen. See Setting Custom Security Permissions (on page 125).</p>
19	Copy Staff Permissions from one user to others.	<p>Most of your staff are likely to need one of a small number of standard Permission sets which you create. You set up one user with the correct customised Permission set and then drag and drop the Permission set onto the name or Permission set of all the users who need it.</p> <p>You do this at the Staff Permissions maintenance screen. See Copying Staff Permissions (on page 127).</p>
20	Add Contract Dispatch Groups.	<p>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.</p>

Step	Action	Comments
		You add Dispatch Groups at the Analysis tab on the Contract Details screen. See Adding Dispatch Groups (on page 138).
21	Add Contract Claim Groups.	<p>Contract Claim Groups are used to group Claims for analysis and reporting purposes for an individual Contract. You create them only if a standard RAMM Contractor function to group the Claim lines does not already exist.</p> <p>You add Claim Groups at the Analysis tab on the Contract Details screen. See Adding Claim Groups (on page 142).</p>
22	Add Account codes	<p>Claim lines can be associated with general ledger account codes for financial analysis and reporting purposes. You add Account codes in RAMM Contractor and associate Contract CSIs with them. Once Claims have been accepted, the financial information at Claim line level can then be exported into an external accounting application. Both the Contractor and Network Owner can do this.</p> <p>You add Account codes at the Analysis tab on the Contract Details screen. See Adding Account Codes (on page 144).</p>
23	Add Dispatch Priority codes.	<p>You add Priority codes to associate them with Dispatches and Jobs. Staff who programme and assign Dispatches can then tell which should be performed first. You can also use Priority codes to ensure emergencies stand out from all other Dispatches regardless of Priority.</p> <p>You add Dispatch Priority codes at the Priority tab on the Dispatch tab on the Contract Details screen. See Adding Priority Codes (on page 149).</p>
24	Add Maintenance Note Actions.	<p>Best practice, when staff have finished performing a Job, is to list the tasks undertaken to fix the Fault. You create Maintenance Note Actions so that Pocket RAMM users can easily enter notes describing what they actually did to Complete the Job.</p> <p>You add Maintenance Note Actions at the Maintenance Note Actions tab on the Dispatch tab on the Contract Details screen. See Adding Maintenance Note Actions (on page 151).</p>

Step	Action	Comments
25	Set up Contract Patrols.	<p>Patrols in RAMM Contractor and Pocket RAMM have been optimised so that Patrol operators can use touch screen devices. This means that they can add Dispatches at the press of a button. They can shift jobs on the Pocket RAMM map with their index finger. They can become remarkably efficient once set up is complete.</p> <p>You set up Contract Patrols at the Contract Patrols tab on the Contract Details screen. See Contract Patrol Set Up Process (on page 156).</p>
26	Set Dispatch options.	<p>When you set up a Contract in RAMM Contractor the Dispatch options you choose will depend on the nature of the Contract you have with the Network Owner and also on your use of Pocket RAMM. You set Dispatch options for Progress Notes, Dispatch Status, Dayworks, Maintenance Costs association and Dispatch Completion to match your contract provisions and your business processes.</p> <p>You set Dispatch options at the Dispatch tab the Contract Options tab on on the Contract Details screen. See Setting Dispatch Options (on page 179).</p>
27	Enable Programming.	<p>If you are required by your contract, to present a Programme of works to the Network Owner, you need to enable Programming. If you have a contract which is for regular standard operations such as a Traffic Light Maintenance Contract, you would not need to enable Programming as your duties are the same every month. So you would set Programming to Not in use.</p> <p>You enable Dispatch Programming at the Dispatch tab the Contract Options tab on on the Contract Details screen. See Enabling Programming (on page 184).</p>
28	Set Response Time options.	<p>The Contractor and the Network Owner both have an interest in the time it takes from when a Dispatch is added to RAMM Contractor or to Pocket RAMM to when it is Assigned to and Completed. If the contract with the Network Owner requires you to perform to certain Response Times, you can set these up in the Contract.</p> <p>You set Response Time options at the Response Time</p>

Step	Action	Comments
		tab the Contract Options tab on on the Contract Details screen. See Setting Response Time Options (on page 190).
29	Enable Auto Claiming and Estimating.	<p>You enable Auto Claiming in Pocket RAMM, RAMM Contractor or both to have Schedule Items added or offered to the user when a Dispatch is completed.</p> <p>You enable Auto Claiming and Estimating at the Dispatch tab the Auto Claims tab on on the Contract Details screen. See Enabling Auto Claiming and Estimating (on page 194).</p>
30	Set Permission Control.	<p>The Claim Owner, Maintenance Cost, Claim Group 2 and Dispatch Groups 2 and 4 values apply to all Contracts of the relevant Asset Type. You need to define who controls Staff Permissions for these five critical fields or panels. Once set, these controls can be changed only by the Network Owner.</p> <p>You set Permission Control at the Dispatch tab the Permission Control tab on on the Contract Details screen. See Setting Permission Control (on page 198).</p>
31	Set Audit Record options.	<p>RAMM Contractor can keep a variety of audit records. These are for changes to Dispatches, Claim and Estimate lines, Claim Headers and to the Contract itself. You select the actual audit records you want to keep for a Contract. You should make this selection when setting up the Contract as RAMM Contractor can not create audit records retroactively.</p> <p>You set Audit Record options at the Auditing Tab tab on the Contract Option on on the Contract Details screen. See Setting Audit Record Options (on page 202).</p>
32	Set default values for fields.	<p>You can set fields in RAMM Contractor to have default values. These are defaults for tables and related columns. You can do this for just one user or for all users in a Contract. This can be useful when completing the various fields in the Dispatch Entry and other screens.</p> <p>You do this at the Column Default Values screen. See</p>

Step	Action	Comments
		Setting a Default Value for a Field (on page 206).
33	Manage Offline Synchronisation for Pocket RAMM users.	<p>Pocket RAMM users will sometimes work offline. This is where they work without being connected to the broadband network. You speed up the resulting synchronisation process for Offline Pocket RAMM users by limiting the data synchronised to defined Table Groups.</p> <p>You do this at the Add Synchronisation for User screen. See Managing Offline Synchronisation for Pocket RAMM Users (see "Managing Offline Synchronisation" on page 209).</p>
34	Set Signs, Street Lights and Traffic Signals options.	There are a number of options related only to Signs, Street Lights and Traffic Signals. See Introduction to the Stock Asset Type Options (on page 212).
35	Set Claim options.	<p>You need to set up Claim lines to correspond to the provisions of the contract with the Network Owner. In particular, whether On-cost should be enabled and also whether Maintenance Cost values should be required on the Claim line if they are required on the Schedule Item. You can set up default Headers and Footers for the Claim reports as well.</p> <p>You do this at the Claim Options tab on the Claims tab of the Contract Details screen. See Introduction to Claim Options (on page 224).</p>
36	Add CSIs.	<p>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.</p> <p>You do this at the General tab of the Contract Schedule Items maintenance screen. See Adding CSIs (on page 238).</p>
37	Associate Maintenance Cost Items with the CSIs.	<p>You set up Maintenance Cost items and associate them with CSIs (Contract Schedule Items). When the resulting Claim Line data is transferred to RAMM, the Network Owner uses the data for Maintenance Costs comparison purposes.</p> <p>You do this at the Maintenance Cost tab of the</p>

Step	Action	Comments
		Schedule Items maintenance screen. See Associating Maintenance Cost Items (on page 242).
38	Define Asset Related Charges for Auto Claiming.	<p>You set up Auto Claiming to automate the process of generating Claim and Estimate lines when a Job or Dispatch is Completed. You can define Asset Related Charges for only Signs, Street Lights and Traffic Signals.</p> <p>You do this at the Automatic Claims tab of the Contract Schedule Items screen. See Defining Asset Related Charges (on page 264).</p>
39	Defining Asset-related Charge Overrides.	<p>You use Asset Related Charge Overrides when you need to substitute one Claim line in place of a number of Claim lines.</p> <p>You do this at the Automatic Claims tab of the Contract Schedule Items screen. See Defining an Asset Related Charge Override (on page 266).</p>
40	Set up Auto Claiming for CSIs.	<p>Auto Claiming for all Assets other than Signs, Street Lights and Traffic Signals, is set up using the Auto Claiming Wizard.</p> <p>See Using the Auto Claiming Wizard (on page 271).</p>
41	Set up Cost Escalation.	<p>Cost Escalation is a Contract provision to allow groups of Contract costs to be increased during the term of the Contract. The escalation is by an agreed percentage and frequency. It commences from an agreed Initiation Date. The rate of Cost Escalation may vary by item. Contract items subject to the same Cost Escalation imperatives are grouped under the same Cost Escalation Category.</p> <p>You set up Cost Escalation before you open the Contract.</p> <p>See Introduction to Cost Escalation Set Up (on page 276).</p>
42	Open the Contract.	<p>When you have defined all the Contract details you can open the Contract. This makes the Contract available for use. At this stage, all the Permissions which you have defined for the staff will come in to effect. They can log in to the Contract using the RAMM Hosting Service and perform the duties for which they have Permission.</p>

Step	Action	Comments
		You do this at the Contract Details screen. See Opening the Contract (on page 288).
43	Get to work	Once you have made yourself familiar with the screens in RAMM Contractor you should read the <i>RAMM Contractor Best Practice</i> guide to find out how to manage the Contract.

Initial Contract Details

The first actions you take when you add a Contract in **RAMM Contractor** are to define the most basic Contract details. You must:

- name the Contract
- choose the Security Zone for the Contract
- define the **Start** and **End** dates for the Contract
- define the Network Owner and contact
- define the Contract Manager for the Network Owner and for the Contractor.

It is also possible that you might have to add Organisation codes. You would have to do this only if you do not use the **RAMM Hosting Service**.



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Organisation Codes.....	42
Adding an Organisation Code	42
Introduction to Initial Contract Details	43
Adding Initial Contract Details	45

Organisation Codes

Organisations in **RAMM Contractor** are the parties to the Contract. They are the Network Owner, the Contractor and any Subcontractors.


Normally these Organisations will already exist in the Database and will have been added by **RAMM Software Limited**. However, the situation may arise where an Organisation does not exist. In this case you need to add them. This would only arise if you were not on the **RAMM Hosting Service**.

Initial Contract Details

The Organisations must exist in **RAMM Contractor** for you to be able to add the initial Contract details. See Adding Initial Contract Details (on page 45).

Staff Permissions

When you are adding staff and granting Staff Permissions, you must associate the staff with an Organisation. See Adding Staff to a Contract (on page 118).



You would only add Organisation codes if you were not on the **RAMM Hosting Service**. **RAMM Software Limited** staff add Organisation codes for users on the **RAMM Hosting Service**.

Adding an Organisation Code

Introduction

Organisations in **RAMM Contractor** are the parties to the Contract such as the Network Owner, the Contractor and Subcontractors. You use Organisation codes when adding initial Contract details, adding staff and granting Staff Permissions.

Every staff member must belong to an Organisation. Staff members are grouped by Organisation code at the **Staff Permissions** screen.

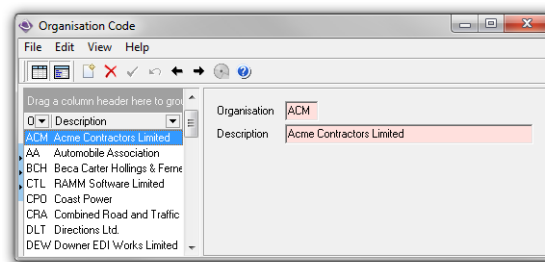
Before you do this you need to have:

- launched **RAMM Contractor**.



Menu Path

Follow the menu path Maintenance > Organisation to open the **Organisation Code** maintenance screen.

► To Add Organisation Codes



To do this you follow these steps:

- 1 Press CTRL+N or  to add a new record.
- 2 Type the unique code for the Organisation in the Organisation field. This may be up to three alphanumeric characters in length.
- 3 Type in the Description field, the actual name of the Organisation or the name by which they are known, if different.
- 4 Press  to save the record.
- 5 To add another Organisation code, go to step 1. Otherwise, go to step 6.
- 6 Close the screen to be returned to the **RAMM Contractor** main screen.

Introduction to Initial Contract Details

When you first begin to set up a Contract in **RAMM Contractor** you must name the Contract, associate it with a Security Zone, define the period during which the Contract is to be active and designate the main players such as the Contract Manager for the Contractor and the contacts for all parties to the Contract.

Contract Name

When you set up a Contract in **RAMM Contractor**, best practice is to give it the actual name of the legal contract document on which it is based. Then, if you have more than one Contract in **RAMM Contractor** you will be in no doubt which contract you are dealing with.

Security Zones

A Security Zone is a portion of the Network defined as a collection of Roads.

Security Zones enable a Network Owner to divide the Road Network into Network Management Areas.

A Network Owner would do this if there were two or more Maintenance Contractors working within a Local Authority Network. Each Maintenance Contractor would have responsibility for one part of the Network.

So the Network would be divided into at least two Security Zones. Each Maintenance Contractor would have database access to and see information related only to the portion of the Network which was in its respective Security Zone.

When Security Zones were introduced, some standard definitions were automatically put in to **RAMM** Databases. In the case of a Local Authority Database, one Security Zone called Entire Network, was automatically placed into the database. In the case of a State Highway Database, in addition to the Entire Network, Security Zones were created for each **RAMM** Region, Network Management Area and for each Contract Area within the NMA.

Where a Network has not been divided into a number of Security Zones, the Security Zone which contains every Road in the Network is the only one available. This is called the **Entire Network**.

If you need to know more about Security Zones see the Security chapter of the *Working with RAMM* guide.

Start and End Dates

You should define the Start and End dates to reflect the actual wording of the Contract.

Consultants

Some Network Owners outsource the running of the Maintenance Contract to Consultants.

You need to specify in the Contract the name of the Organisation and should also define the person managing the Maintenance Contract and the person whom to contact if different.

Contract Manager

The Contractor and the Network Owner, or their Consultant, will each have designated a person to be in charge of the Maintenance Contract on their behalf and to specify the Staff Permissions. In **RAMM Contractor** these people are referred to as the Contract Managers.

Those named in the Contract Manager fields on the General tab of the Contract Details screen are the only two users who can Lock or Unlock Dispatches. See Lock Dispatch (on page 348).

Organisations

Normally both the Network Owner and the Contractor Organisations will exist in the database. Certainly, the Network Owner will have been added by [RAMM Software Limited](#). If the Contractor has not been added, then the person adding the Contract will need to add the Organisation before adding the Contract.

You add Organisation codes at the **Organisation Code** maintenance screen. See Adding an Organisation Code (on page 42).

Adding Initial Contract Details

When you add a Contract in [RAMM Contractor](#) you define it to mirror the actual Maintenance Contract you have with the Network Owner. So the name and other details of the Maintenance Contract should be the same as in the Contract in [RAMM Contractor](#).

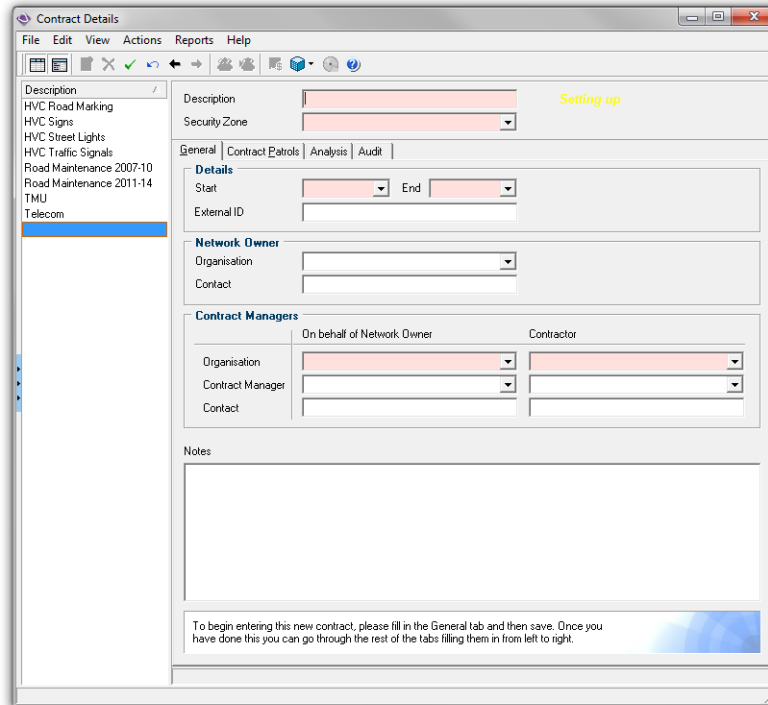
Before you do this you need to have:

- logged in to [RAMM Contractor](#) using the [RAMM Hosting Service](#). You do this using your preferred web browser. See Logging in to the [RAMM Hosting Service](#) (on page 17).
- created the Security Zone for the Contract. You do this in [RAMM Manager](#). See the Security chapter of the *Working with RAMM* guide.
- a copy of the contract to which to refer if necessary.

Menu Path

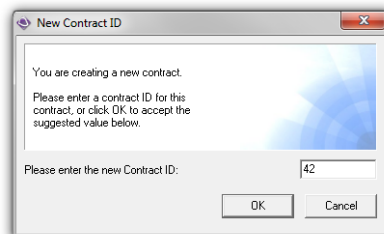
Follow the menu path Maintenance > Contract Details to open the **Contract Details** screen.


► To Add Initial Contract Details



To do this you follow these steps:

- 1 Press CTRL+N or  to add a new record. The **New Contract ID** dialog will open.



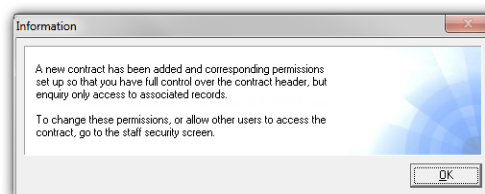
- 2 The value in the **Please enter the new contract ID:** field will be the next available consecutive Contract number. Press  to accept this value and close the dialog.
- 3 Type in the **Description** field, the actual name of the Maintenance Contract.
- 4 Select, from the **Security Zone** drop-down list the area to which the Maintenance Contract relates.



When the Network Owner authorised RAMM Software Limited to grant you access to their database, they will have specified which Security Zone you can access to fulfil the Contract requirements. This should be available to you at the Security Zone drop-down list. If not, Contact RAMM Software Limited (on page 26).

- 5 In the **Details** section, select from the **Start** and **End** drop-down calendars, the start and end dates of the Maintenance Contract.
- 6 If the Network Owner or the Consultant refers to the contract by their own unique code, type it in the **External ID** field.
- 7 In the **Network Owner** section, if the Network Owner uses a Consultant to manage the Maintenance Contract, select the Network Owner from the **Organisation** drop-down list and type the name of their contact person in the **Contact** field. Otherwise, go to step 8.
- 8 In the **Contract Managers** section, select the names of the **Organisations** and the **Contract Managers** from their respective drop-down lists. If the person to contact differs from the Contract Manager, type their name in the **Contact** field.
- 9 Type any relevant notes in the **Notes** field. 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.

- 10 Press to save the initial Contract details.
An **Information** screen will open.



- 11 Read the message and press to save the record and open the **Add Asset Types** screen.
12 Go to Introduction to Asset Types and User Defined Tables (UDTs) (on page 52).



It is very important that you save the record before attempting to complete the Analysis tab or any other task. This formalises the restrictions which exclude each of the two Contract Managers from the Contract areas which are the prerogative of the other Contract Manager.

Contract Asset Types

Most Contracts are for the maintenance of one Network Asset Type. A good example of this is Street Lights. Other examples could be Traffic Signals or Culverts.

If you set up separate Contracts for different Asset Types this gives you greater control over budgets, programming and the Claims process.

You can set up a Contract for the standard **RAMM** Asset Types. If the Asset Type does not yet exist in **RAMM** you can create a User Defined Table (UDT) for it. See the User Defined Table chapter of the *Working with RAMM* guide.

In This Chapter

Introduction to Asset Types and User Defined Tables (UDTs)	52
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Introduction to Asset Types and User Defined Tables (UDTs)

RAMM Contractor Contracts are for the maintenance of Network Assets. **RAMM** has a number of standard Asset Types which can be used as the basis for a Contract. You can set up a Contract for the maintenance of one or more of the following:

- Administration
- Berms
- Bridges
- Carriageways
- Crossings
- Drainage (including Culverts)
- Features
- Footpath
- Islands
- Loading Count
- Markings
- Miscellaneous Structures
- Pavement
- Pavement Test Pit
- Railings
- Rating Scaled
- Retaining Walls
- Roading
- Shoulders
- Signs
- Speed
- Street Lights
- Surface Water Channels
- Top Surface
- Traffic Count
- Traffic Facilities
- Traffic Signals
- Treatment Length
- Treatment Selection
- Tree.

User Defined Tables

Most likely, the Asset Types to be maintained under the Contract will exist by default in **RAMM**. If not, you can add your own User Defined Table (UDT) for the Asset.

This is a **RAMM** database table created by a **RAMM** user. It is used to hold data related to an Asset or Nonasset which does not have its own default **RAMM** table. UDTs are created and maintained in **RAMM Manager** and are available in **RAMM** and **Pocket RAMM** by default. They can be defined to be available in other **RAMM** modules if appropriate.

See the User Defined Tables chapter of the *Working with RAMM* guide.

Selecting Contract Asset Types

Introduction

You can not save a **RAMM Contractor** Contract unless you have selected at least one Asset Type. You can select more than one if required.

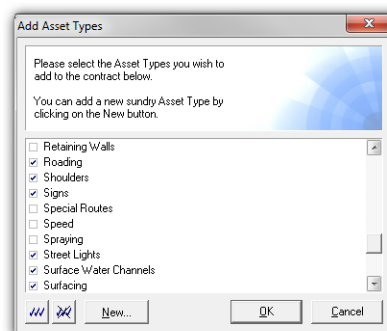
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- added the User Defined Table if the Contract is for the maintenance of an Asset Type which is not one of the standard **RAMM** Asset Types. You do this in **RAMM Manager**. See the User Defined Tables chapter of the *Working with RAMM* guide.




Menu Path

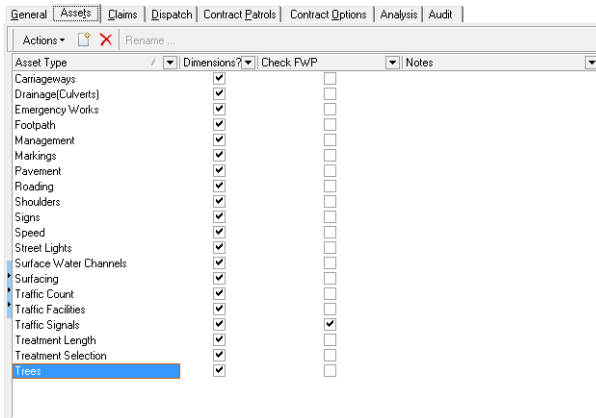
Follow the menu path (add initial Contract details) > (press Save Record) to open the **Add Asset Types** screen.

► To Select Contract Asset Types





To do this you follow these steps:

- 1 Select the check boxes adjacent to the Contract Asset Types which you want to include.
- 2 If you want to select all Asset Types, press . If you want to clear all the check boxes and start again, press .
- 3 When you have selected your Asset Types, press  to close the screen. You will be returned to the **Contract Details** screen at the **Assets** tab. The selected Asset Types will be displayed.



Asset Type	Dimensions?	Check FWP	Notes
Carriageways	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Drainage(Culverts)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Emergency Works	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Footpath	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Markings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Pavement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Roading	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Shoulders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Signs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Speed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Street Lights	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Surface Water Channels	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Surfacing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Traffic Count	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Traffic Facilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Traffic Signals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Treatment Length	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Treatment Selection	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Trees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

- 4 If you have selected an Asset Type in error you can delete it by selecting it and pressing . If there is an Asset Type which still needs to be selected you can press  to open the **Add Asset Type** screen again and select the Asset Type.
- 5 Go to Introduction to CSI Headers (on page 56).

CSI (Contract Schedule Item) Headers

CSI Headers are used by Network Owners to group Schedule Items. They can then categorise the activities and analyse costs and associated activities over a period of years and even over several contracts at once.

Normally, the Network Owner will set up or select CSIs.

In This Chapter

Introduction to CSI Headers	56
CSI Headers and Spreadsheets	57
CSI Headers and Contract Schedule Items	57
Adding CSI Headers	59
Selecting CSI Headers	60

Introduction to CSI Headers

When a CSI Header is added, it becomes available to all Contracts in the database. You add them at the **CSI Header** maintenance screen. See Adding CSI Headers (on page 59).

When you are setting up a Contract in **RAMM Contractor**, you limit the available CSI Headers to only those relevant to the Contract.

You select the relevant CSI Headers to be used in a Contract at the CSI Headers tab on the Claims tab of the **Contract Details** screen.

See Selecting CSI Headers (on page 60).

The Network Owner Has Control

Standard practice is that the Network Owner controls CSI Headers. They would set up a standard set that all Contractors are obliged to use.

The Contract Manager would not usually have permission to maintain CSI Headers.

You would contact the Network Owner with queries concerning CSI Headers.

Set Up Claims Activities at Any Time

CSI Headers do not have to be set up at the commencement of the Contract. A Network Owner can associate a Claims Activity with a CSI Headers at any time at the (Schedule Item) **Maintenance** screen.

See Associating Maintenance Cost Items (on page 242).

CSI Header Example One

For example, the Schedule Items for erecting a Street Light pole may include several kinds of pole at different rates such as Wooden Pole, \$500, Aluminium Pole \$700 and Steel Pole at \$350. If the Network Owner wanted to know how many poles have been added to the Network in the last ten years, irrespective of pole type, the three Schedule Items could be grouped and analysed using a CSI Header named New Pole.

CSI Header Example Two

Pavement Maintenance could be a CSI Header under which Potholes, Digouts, Deformation Treatments, and Depression Treatments were grouped.

CSI Headers and Spreadsheets

Prior to **RAMM Contractor**, many users specified Contract Schedule Items on a spreadsheet. So that you can be sure what is meant by CSI Header and Contract Schedule Item, an explanatory graphic is displayed below.

Item no	Item no. descr	Qty	Unit	agreed_rate	Budget
1	Preliminary & General				
1.1	Establishment	1	LS	300.00	300.00
1.3.1	Preparation	1	LS	300.00	300.00
1.3.2	Management	36	mt	20.00	720.00
1.4	Inspections	3	ea	100.00	300.00
2	Pavement				
2.1	Drivout	1	m2	2500.00	75000.00
2.3.1	Positive Drainage	1	m	15.00	4500.00
2.3.2	Geotexture	1	m2	3.00	300.00
2.4	Stabilisation	1	m2	11.50	172500.00

Spreadsheet Column Headings

In RAMM Contractor, the headings under which the Contract Schedule Items are grouped are called **CSI Headers**

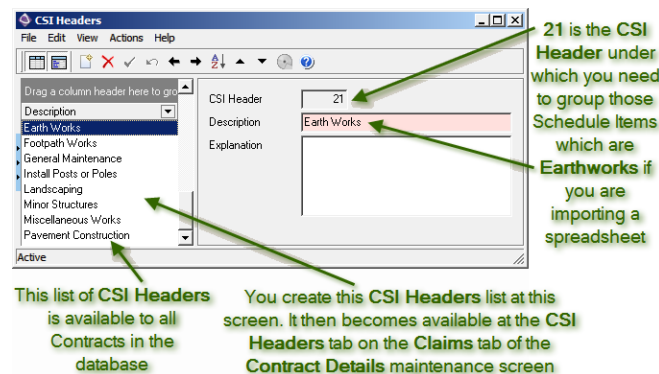
The spreadsheet lines with the item number, description, quantity, unit and financial information are called **Contract Schedule Items**

CSI Headers and Contract Schedule Items

CSI Headers for All Contracts in the Database

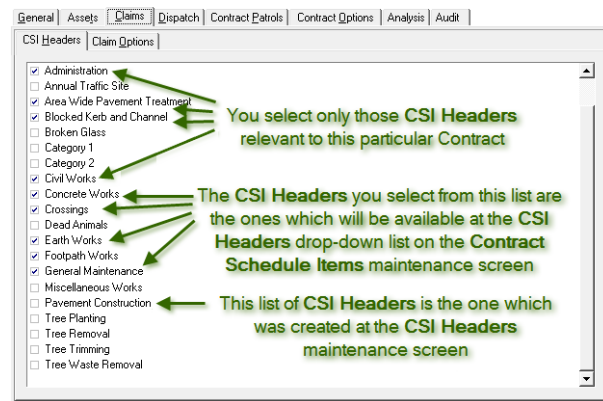
A Network Owner may use CSI Headers to group Schedule Items for analysis and reporting purposes. You add CSI Headers at the **CSI Headers** maintenance screen. See Adding CSI Headers (on page 59).

If importing a spreadsheet of Contract Schedule Items, you add the CSI Headers beforehand. You then group the Contract Schedule Items using the CSI Header number to link them. This number is 21 in the graphic below.



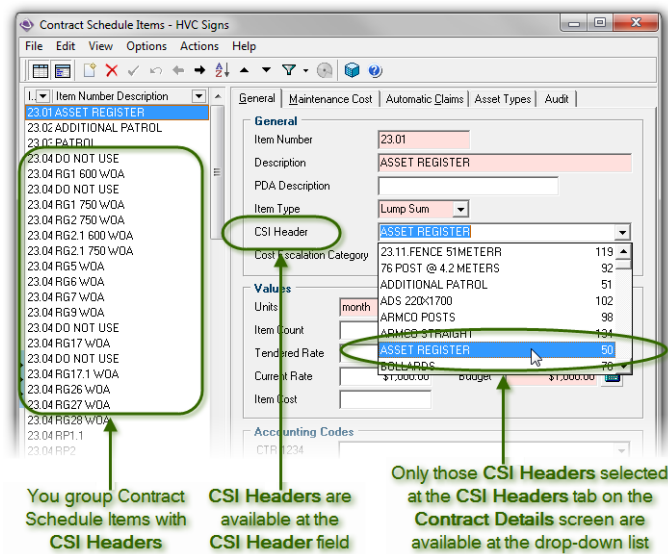
CSI Headers for a Particular Contract

When creating a Contract in **RAMM Contractor** you should limit available CSI Headers to those relevant to the particular Contract. You select CSI Headers for a Contract at the CSI Headers tab on the Claims tab of the **Contract Details** screen.



CSI Headers to Group Contract Schedule Items

When adding Contract Schedule Items you can group them by CSI Header. You do this at the CSI Header field on the **Contract Schedule Item** maintenance screen. Only those CSI Headers selected at the CSI Headers tab on the Claims tab of the **Contract Details** screen will be available from the CSI Headers drop-down list.



Adding CSI Headers

Introduction

A Network Owner may use CSI Headers to group Contract Schedule Items for analysis and reporting purposes. A Contractor would add CSI Headers under the direction of the Network Owner. The Network Owner performs this procedure.

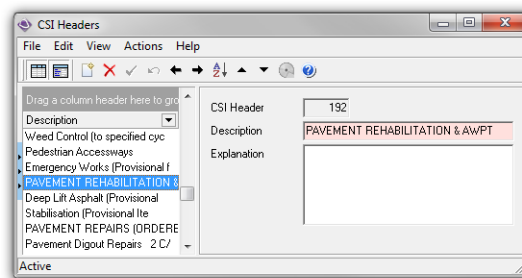
Before you do this you need to have:

- launched **RAMM Contractor**
- a copy of the contract to which to refer if necessary.



Menu Path

Follow the menu path Maintenance > CSI Headers to open the **CSI Headers** maintenance screen.

► To Add CSI Headers



To do this you follow these steps:

- 1 Press CTRL+N or  to add a new record.
The CSI Header number will default.
- 2 Type, in the **Description** fields the name for this CSI Header.
- 3 Type a useful explanation of the purpose of this item in the **Explanation** field.
- 4 Press  to save the record.
- 5 If you want to add another CSI Header, go to step 1. Otherwise, go to step 6.
- 6 Close the screen in the normal manner to be returned to the **RAMM Contractor** main screen.

Selecting CSI Headers

Introduction

A Network Owner may use CSI Headers to group Schedule Items for analysis and reporting purposes. Normally, the Network Owner would select the CSI Headers appropriate to the Contract. A Contract Manager might select the CSI Headers for the Contract, but only under the instruction of the Network Owner.

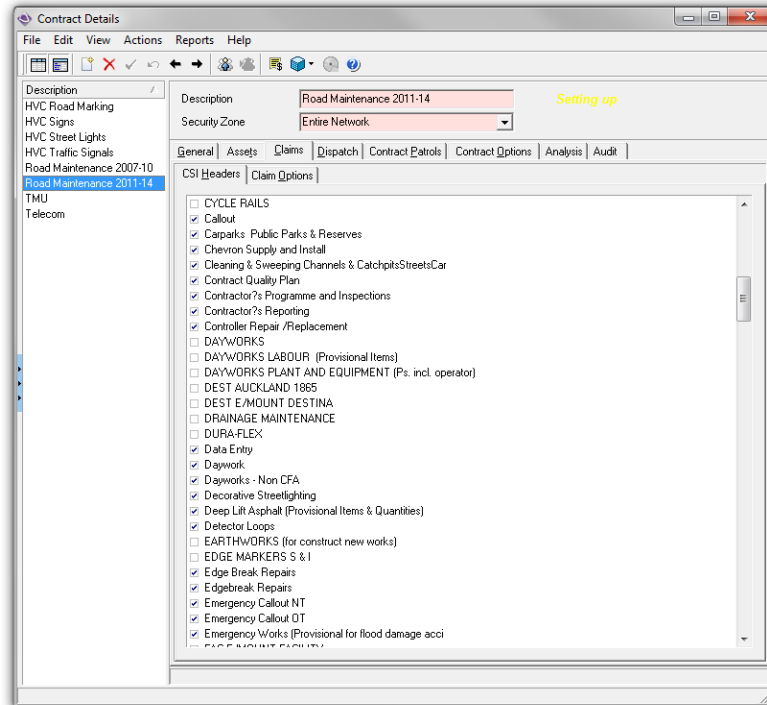
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- selected the Asset Types for the Contract. You do this at the **Add Asset Types** dialog. See Selecting Contract Asset Types (on page 53).


Menu Path

Follow the menu path (add initial Contract details) > (select Asset Types) > (press Claims) > (press CSI Headers) to open the **Contract Details** screen at the CSI Headers tab.

► To Select CSI Headers



To do this you follow these steps:

- 1 Select the CSI Headers which are appropriate to the Contract.
- 2 Press  or CTRL+S to save your changes.
- 3 If there is a problem, contact the Network Owner with any queries.
- 4 Go to Introduction to Maintenance Costs (on page 64).

Maintenance Costs

Maintenance Costs is the measure of the actions taken to maintain the Network inventory. Maintenance Costs is often referred to as Maintenance Activity.

Network Owners use Maintenance Activity to compare Network Maintenance by year. The items for comparison vary depending on the business practices of the Network Owner. Some compare only the Maintenance Activities performed each year. Others are interested only in the cost comparison. Many wish to compare both. Maintenance Costs can also be used in the export to dTIMS for pavement deterioration modelling.

You will want to set up Maintenance Costs to match your business practices.

When you are setting up a Contract it is very likely that the Maintenance Cost codes and lookups will already exist in the database. If not, the Network Owner will usually add them. If the Contractor adds them it would be under the direction of the Network Owner. The Contractor normally adds the Maintenance Activity data.

On each Dispatch there is the option to select a Cost Group, Activity, Fault and Failure to assist the Network Owner with Network maintenance planning. You should either set up your CSIs (Contract Schedule Items) so that the Maintenance Costs default for each Claim Line, or set up your Fault Categories so that Maintenance Costs default for each Dispatch. This saves time and increases accuracy.

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Introduction to Maintenance Costs

Maintenance Costs are used to record and analyse either Network Maintenance:

- Costs
- Activities
- or both Costs and Activities.

You set up Maintenance Costs in **RAMM Contractor** to match your business practices. You define overall Contract parameters and then set up your Maintenance Costs lookups which you then associate with Fault Categories, CSIs (Contract Schedule Items) or both. When you have collected your Maintenance Activity data, you Transfer it to **RAMM** Maintenance Costs. You can then view Maintenance Costs in **RAMM**. You can also export your data to dTIMS for deterioration modelling.

Maintenance Costs Contract Parameters

You set three Contract parameters. Your choices will reflect your business practices:

- **Maintenance Cost List**
You determine whether **RAMM Contractor** will extract Maintenance Costs data at Dispatch level, CSI level or both. See Maintenance Cost List (on page 225).
- **Maintenance Cost Values Required**
You determine whether the transfer of Maintenance Costs values will be prevented, optional or mandatory. See Maintenance Cost Values Required (on page 226).
- **Use Default Rates**
You have four options when defining the data which will actually be Transferred to **RAMM** Maintenance Costs. One of them is to use Default Rates. See Use Default Rates (on page 227).

Maintenance Costs Conversion Options

When you have collected your Maintenance Activity data, you Transfer it to **RAMM** Maintenance Costs.

There are four conversion options. You need to be sure that you are setting up your Maintenance Costs lookups, and in particular, your Activities, so that the data Transferred to **RAMM** Maintenance Costs matches your requirements and your business practices.

See Maintenance Costs Conversion Options (on page 66).

Maintenance Activity Lookups

You add your Maintenance Costs Lookups before you can add your CSIs. There are four **RAMM Contractor** lookups for Maintenance Costs. They are:

- **Cost Group**
These are the general areas in which Maintenance Costs arise. Examples could be Bridge Maintenance, Street Lighting and Surfacing. See Cost Groups (on page 78).
- **Activity**
These are what was done to maintain the Network. Examples are Guardrail and Barrier Maintenance, Lamp Replacement and Fill Cracks. See Activities (on page 79).
- **Fault**
These are what was repaired when the Activities were undertaken. Examples are Concrete Cracking, Flickering Light and Depression. See Faults (on page 80).
- **Failure**
These are the cause of the Faults which were repaired. Examples are Surface Water, Subsidence and Unknown. See Failures (on page 80).



Failure is not commonly used and may be removed in a future version of **RAMM Contractor**.

Maintenance Costs and Dispatches

The Contractor is usually responsible for the Maintenance Costs data. They do this by associating Maintenance Costs values with Dispatches.

Some operators assign Maintenance Costs values to the Dispatch as a whole. They do this by associating them with the Dispatch **Fault Category**. Others prefer the more granular approach of associating them with each individual Claim line. They do this by associating them with individual CSIs (Contract Schedule Items). It is also possible to use a combination of the two.

See Maintenance Costs and Dispatches (on page 81).

Transfer Maintenance Costs

Once the Network Owner has approved the Claim and formally accepted it, you will complete the Claim and transfer it 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.

See the Maintenance Costs chapter in the *Working with RAMM* guide.

Maintenance Costs in RAMM

You can view Maintenance Costs in the standard **RAMM** Grid and Detail screens.

See Viewing Maintenance Activity Details (on page 86).

Maintenance Costs Conversion Options

There are four conversion options when Transferring your Maintenance Costs transactions into **RAMM** Maintenance Costs.

Transaction Transfer with no Conversions

The first option is to do nothing. You define no Default Conversion Rates or Factors for Maintenance Activities.



This is not the recommended procedure for Maintenance Activity comparisons.

Then when the costs of Network Asset Maintenance transactions are Transferred into **RAMM** Maintenance Cost, the actual costs only will be Transferred. The RCI (Road Construction Index) will be applied to adjust these records to account for cost inflation when you are viewing Maintenance Costs.

You would only use this option if your data were so sound as not to need qualification and you were most interested in comparing actual costs incurred (adjusted to account for inflation) rather than Activities performed. See Convert Transactions Using RCI Only (on page 67).

This is not industry standard operating procedure.



The (RCI) is a value that is used to factor Maintenance Activity values to a certain date. You use this to compensate for cost inflation so that when you are comparing Maintenance Activity cost prices the comparison is more meaningful.

Other Transfer Options

Alternatively, you set up a system of **Default Conversions** for Maintenance Cost Activities if:

- you want to make meaningful transaction cost comparisons when a variety of **Units of Measure (UoMs)** has been used for the same **Activity**.
So you need to set and apply different **Default Conversion Rates** to make comparisons meaningful between, for instance, Digouts measured in m² and those measured in m³. See **Adjust for Varying Units of Measure** (on page 69).
- the **Contracts** have no specified rates, or rates vary so widely between **Contracts** as to make straight cost comparisons meaningless.
So you set **Default Conversion Rates** for each **Activity UoM**. You can do this either because the cost of the **Activities** is irrelevant and you wish to compare only **Activities** carried out, or you can do it because you want to compare costs but need to define a best guess value for those.
See **Set Default Rates** (on page 70).
- you wish to convert all transactions to the industry standard m2 **Unit of Measure** and use this for comparison purposes.
You can use this option to compare transaction costs or **Activities** carried out.
See **Convert to m2 for Comparison** (on page 75).

Convert Transactions Using RCI Only

If you wish to Transfer or import raw Maintenance Costs transaction data only, you will not need to use **Default Conversion Rates** or **Default Conversion Factors**. All conversions will then be managed using the RCI process. See **RCI** (on page 520).

Activity Set Up

When you add your Maintenance Costs **Activities** at the **Activity** screen you need add only the **Activity code**, the **Description** and an **Explanation** if required. You have no need to select a **Default Rate Date** nor any other options.

1 You complete only the **Activity, Description and Explanation** fields

2 If you have no need for **Default Conversion Rates and Default Conversion Factors**

3 When no **Default Rate Date** has been selected

4 The **Quantity Conversion** panel remains blank and unable to be entered or edited

Contract Set Up

If you do not use default rates, then when setting up your Contracts you need to clear the Use default rates when transferring claims to Maintenance Cost option.

Clear this option to use actual transaction costs

RCI Factor

You then use the RCI to convert the values being compared so that cost inflation is taken into account. You update the RCI in **RAMM Manager** and then use **RAMM Manager** to apply the RCI to your Maintenance Costs values. See the Maintenance Costs chapter of the *Working with RAMM* guide.



Default Conversion Rates and Default Conversion Factors are meaningless unless associated with a date at which they are valid. Therefore the Quantity Conversion panel is not available unless a Default Rate Date has been selected at the Default Rate Date drop-down list.

Adjust for Varying Units of Measure

It is not uncommon across Contracts that a number of different Units of Measure (UoMs) have been used for Claim transactions for the same Activity. This makes unadjusted cost comparisons misleading. For example, an Activity may have been Claimed using m, m2 and m3. If your current standard were to measure this Activity in m3, you would need to define Default Conversion Rates so that the m and m2 rates were equivalent to the m3 rate. You do this at the **Activity** screen.

Activity Screen

You set Default Conversion Rates for your Maintenance Cost Activities at the **Activity** screen. You define Default Conversion Rates at the General tab.

General Tab

At the General tab of the **Activity** screen, you define Default Conversion Rates for each Unit of Measure used in Claim transactions for the Activity. This is the value which will be used when transferring Maintenance Costs from **RAMM Contractor**. It is also used when importing Maintenance Costs from an external source.

Default Rate Date

These Default Conversion Rates must be valid at a certain date. Otherwise they will be meaningless. See Default Rate Date and the RCI (on page 73). You select this date at the Default Rate Date drop-down list.



Default Conversion Rates and Default Conversion Factors are meaningless unless associated with a date at which they are valid. Therefore the Quantity Conversion panel is not available unless a Default Rate Date has been selected at the Default Rate Date drop-down list.

Selecting a date at the Default Rate Date drop-down list makes available the Qty Conversion panel on the General tab of the **Activity** screen.

Qty Conversion Panel

You define Default Conversion Rates at the Qty Conversion panel. First you define the Unit of Measure which has been used in the Claim transaction. Then you define the Default Conversion Rate for it which was valid at the Default Rate Date.

The screenshot shows the 'Qty Conversion' panel. At the top, there is a 'Default Rate Date' dropdown set to '1/06/2010'. Below it is a warning message: 'Please make sure that all Rates below are valid for the Default Rate Date above.' The main section is titled 'Qty Conversion' and contains a table with columns 'Activity UoM', 'Rate', and 'Notes'. The table lists three items: 'm3' with a rate of '\$100.00', 'm2' with a rate of '\$200.00', and 'm' with a rate of '\$300.00'. Annotations with numbered circles point to specific elements: 1 points to the 'Default Rate Date' dropdown, 2 points to the 'Qty Conversion' title, and 3 points to the 'Rate' column.

1 Select a Default Date

2 To make the Qty Conversion panel available...

3 Rate fields display unless Convert to m2 has been selected



If you need the Rate fields when the Factor fields are displaying instead, the Convert to m2 option has been selected at the Convert to m2 tab. Clear this option to display the Rate fields.

Contract Set Up

If you use Default Conversion Rates or Default Conversion Factors, then when setting up your Contracts you select Use default rates when transferring claims to Maintenance Cost.

The screenshot shows the 'Contract Set Up' panel, specifically the 'General' tab. It has several sections: 'General', 'Assets', 'Claims', 'Dispatch', 'Contract Patrols', 'Contract Options', 'Analysis', and 'Audit'. The 'General' section includes 'Days til Payment' (a text field), 'Maintenance Cost List' (a dropdown set to 'Both'), and three checkboxes: 'Require Maintenance Cost values on Claim Line if required on schedule item' (checked), 'Use default rates when transferring claims to Maintenance Cost' (checked), and 'Enable On-cost' (checked). An annotation with a green arrow points to the 'Use default rates when transferring claims to Maintenance Cost' checkbox.

Select this option to use Default Conversion Rates or Factors

Set Default Rates

You should use Default Conversion Rates when Transferring Claim transaction costs to **RAMM** Maintenance Costs or importing the transaction costs from an external program if:

- your Contracts have no specified rates, such as in PSMC, Hybrid or Alliance type contracts or
- the rates vary so widely between Contracts as to make straight cost comparisons meaningless.

You then compare the Activities only, or if you compare costs, you understand that these are not the actual costs.

Activity Screen

You set Default Conversion Rates for Maintenance Cost Activities at the **Activity** screen.

General Tab

At the General tab of the **Activity** screen, you define Default Conversion Rates for each Unit of Measure used in Claim transactions for the Activity. This is the value which will be used when transferring Maintenance Costs from **RAMM Contractor**. It is also used when importing Maintenance Costs from an external source.

Default Rate Date

These Default Conversion Rates must be valid at a certain date. Otherwise they will be meaningless. See Default Rate Date and the RCI (on page 73).

You select this date at the Default Rate Date drop-down list.



Default Rate Date
 Default Rate Date 1/06/2010
 Please make sure that all Rates below are valid for the Default Rate Date above.



Default Conversion Rates and Default Conversion Factors are meaningless unless associated with a date at which they are valid. Therefore the Quantity Conversion panel is not available unless a Default Rate Date has been selected at the Default Rate Date drop-down list.

Selecting a date at the Default Rate Date drop-down list makes available the Qty Conversion panel on the General tab of the **Activity** screen.

Qty Conversion Panel

You define Default Conversion Rates at the Qty Conversion panel. First you define the Unit of Measure which has been used in the Claim transaction. Then you define the Default Conversion Rate for it which was valid at the Default Rate Date.

Default Rate Date
 Default Rate Date: 1/06/2010
 Please make sure that all Rates below are valid for the Default Rate Date above.

Annotations:

- 1 Select a Default Date
- 2 To make the Qty Conversion panel available...
- 3 Rate fields display unless Convert to m2 has been selected

Activity UoM	Rate	Notes
m3	\$100.00	
m2	\$200.00	
m	\$300.00	



If you need the Rate fields when the Factor fields are displaying instead, the Convert to m2 option has been selected at the Convert to m2 tab.

Clear this option to display the Rate fields.

Contract Set Up

If you use Default Conversion Rates or Default Conversion Factors, then when setting up your Contracts you select Use default rates when transferring claims to Maintenance Cost.

Contract Set Up
 General | Assets | Claims | Dispatch | Contract Patrols | Contract Options | Analysis | Audit

Claim Options

General

Days til Payment: [] days

Maintenance Cost List: Both

☒ Require Maintenance Cost values on Claim Line if required on schedule item

☒ Use default rates when transferring claims to Maintenance Cost

Tick this and the actual costs of each claim line will not be transferred to the Maintenance Costs system. Default rates within Maintenance Cost will be used instead.

☒ Enable On-cost

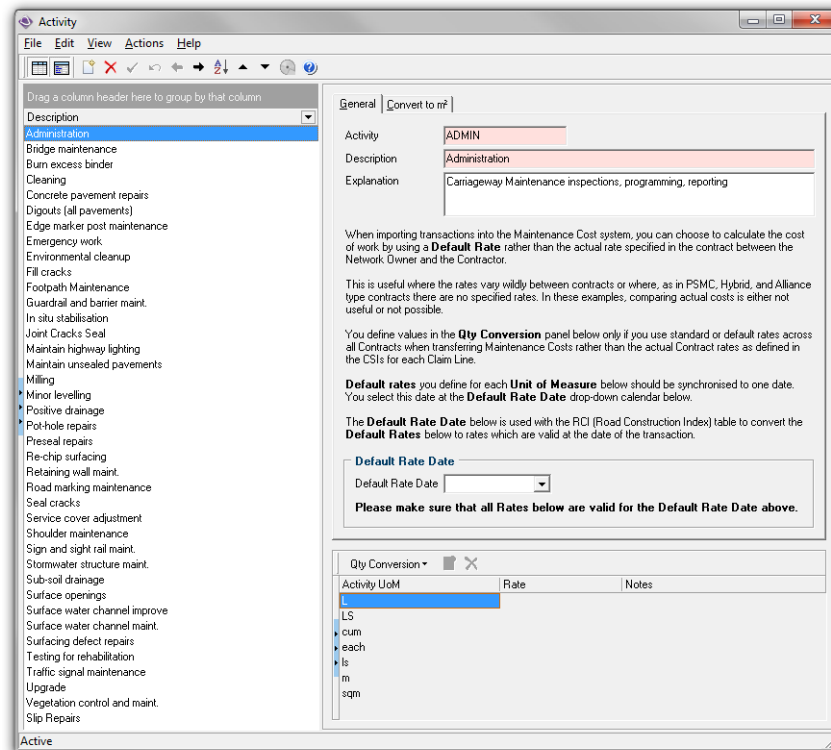
Annotation: Select this option to use Default Conversion Rates or Factors

Mandatory Default Rate Date

Default Rates are used in combination with the RCI (Road Construction Index) table to convert the Contract Rate to one calculated at the same day as the transaction. For the calculation to be meaningful, the Default Rate needs to be linked to a Default Rate Date.



Default Conversion Rates and Default Conversion Factors are meaningless unless associated with a date at which they are valid. Therefore the Quantity Conversion panel is not available unless a Default Rate Date has been selected at the Default Rate Date drop-down list.



Default Rate Date and the RCI

When you set the Default Conversion Rate for Maintenance Cost Activities, you need to define the Default Rate Date.

You do this so that when **RAMM** is calculating Maintenance Costs for comparison purposes, it knows from which date to apply the Road Construction Index (RCI) to adjust the Maintenance Cost values.

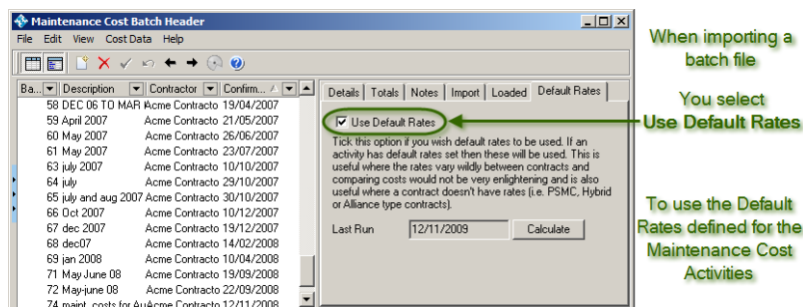
To learn more about the RCI, its maintenance and its application, see the Maintenance Activity chapter of the *Working with RAMM* guide.

Default Rates in Batch Headers

If you are importing your Maintenance Costs from a source other than **RAMM Contractor**, such as a spreadsheet, you can specify that the Default Rates for Activities should be used.

You select the Use Default Rates option on the Default Rates tab of the **Maintenance Cost Batch Header** screen in **RAMM Manager** when you perform the import

Then the Default Conversion Rate you defined at the Convert to m2 tab of the **Activity** screen or the individual Default Conversion Rates you defined in the Qty Conversion panel (if any) will then be used.



Conversion Factors

If a Network Owner has no requirement for the actual rates paid for each Activity, they use a Default Rate instead. See Set Default Rates (on page 70).

Rates Set Up

You can set up **RAMM Contractor** to use Maintenance Costs at Dispatch level, Contract Schedule Item (CSI) level or both.

When using Dispatch level, you set the Maintenance Cost Rates by Fault Category. When using CSI level, you set the Maintenance Cost Rates for each CSI. So Maintenance Cost value record will exist for each Claim line.

Default Options

Users have the option of defining:

- nothing, in which case the actual transaction costs will be transferred to Maintenance Costs
- a variety of individual **Default Rates** for each individual **Unit of Measure** in which case the actual Maintenance Cost rates will be adjusted to account for different Units of Measure or
- one **Default Rate** for all **Units of Measure** with a **m2 Conversion Factor** so that the prices are either meaningfully comparable, if the the Default Rate is accurate, or irrelevant if comparison of Activities carried out is the required comparison set.

Convert to m2 for Comparison

The industry standard is to compare Maintenance Costs in m2.

Use m2 to Compare Work Carried Out

If you want to compare work carried out rather than transaction costs, you convert all Claim transactions to use the m2 Unit of Measure (UoM). You then set a m2 Default Rate which will apply to all transactions. Next you Transfer the Claim transactions into **RAMM** Maintenance Costs.

Then, in **RAMM** Maintenance Costs, you compare the m2 amounts. These are the work carried out and are the basis for your comparisons.

Use m2 to Compare Transaction Costs

If you want to compare m2 transaction costs, you convert all Claim transactions to use the m2 Unit of Measure (UoM). You then set an accurate m2 Default Rate which will apply to all transactions and Transfer the Claim transactions into **RAMM** Maintenance Costs.

Then, in **RAMM** Maintenance Costs, you compare the dollar amounts. These are the adjusted cost of work carried out and are the basis for your comparisons.

Convert to m2

To compare Maintenance Costs in m2 you must first select the Convert to m2 option. You do this at the Convert to m2 tab of the **Activity** screen.

General | Convert to m2

You select the **Convert to m2** option below if you want this **Activity** code to use **m²** as a standard **Unit of Measure** when comparing **Activity** Maintenance Costs

☒ Convert to m2

Default Rate: \$100.00

All transactions for which the **Unit of Measure** has a **Factor** defined below will have their quantities converted to **m²** by that **Conversion Factor**. Transactions in **Units of Measure** for which no **Conversion Factor** has been defined will not be converted to **m²**.

Units of Measure which have not been defined below will be automatically added by RAMM when used in transactions. No **Factor** value will be added. You should check here regularly to define **Conversion Factors** for **Units of Measure** added automatically by RAMM.

Select **Convert to m2**

Type the **Default Rate**

Go to the **General** tab and select a **Default Rate Date**

Activity Screen

You can access this screen from:

- **RAMM** at the **Maintenance Cost** screen by following the menu path Actions > Maintain Lookups > Activity
- **RAMM Contractor** using the menu path Maintenance > Costs > Activity
- **RAMM Manager** using the menu path Maintenance > Lookups > Maintenance Cost > Activity.

Default Rate for the Activity

You then define the Default Rate for the Activity at the Default Rate field on the Convert to m2 tab.



The Default Rate field does not become available until the Convert to m2 option has been selected.

This is the value which will be adjusted by the Road Construction Index (RCI). See RCI (on page 520). You must select a Default Rate Date for this to be meaningful. You must also select a Default Rate Date for the Qty Conversion panel to become available.

Default Rate Date

The Default Rate Date drop-down calendar is on the General tab.

You select a Default Rate Date for the Default Rate so that when **RAMM** is calculating Maintenance Costs for comparison purposes, it knows the date from which to apply the Road Construction Index (RCI) to adjust the Maintenance Cost values.

Selecting a date at the Default Rate Date drop-down calendar on the General tab makes the the Qty Conversion panel available.

You then define Default Conversion Factors to make all relevant UoMs equivalent to m2.



Only those Claim transactions using Units of Measure for which a Conversion Factor has been defined are Transferred to **RAMM** Maintenance Costs.

Define Conversion Factors

You define the values which will convert, say, an Activity transaction measured in m to one measured in m2. The equivalence of m and m2 transactions will vary. You must rely on your own judgement when calculating the appropriate Factor.

When Claim transactions are transferred to **RAMM** Maintenance Costs or imported from an external program, for each Activity transaction, **RAMM** multiplies the original UoM amounts by the Factor you specified for each Activity and Unit of Measure in the **Activity** lookup screen. This converts the amounts to a m2 amount for comparison.

The dollar amounts are replaced with the **Default Rate** for m2. These values are multiplied by the RCI relating to the **Default Rate Date**.

This ensures that the Maintenance Cost comparisons are meaningful - that apples are being compared with apples so to speak.

Unknown Unit of Measure

If, during the import of the Maintenance Costs file or the transfer of Maintenance Costs from **RAMM Contractor**, a Unit of Measure is used for which there is no Factor for conversion to m2, **RAMM** creates one with a Null Factor. You can see examples of this in the graphic below.

You should set appropriate Factors for these Units of Measure.

Select **Convert to m2**

RAMM uses the **Factors** you set to convert all Maintenance Cost transactions to **m2 Units of Measure**

During Maintenance Costs transaction transfer or file import if there is no **Factor** defined for a **UoM** used **RAMM** adds a **Null Factor** and a **Note**

You should set **Factors** for these **UoMs**

Qty Conversion	Factor	Notes
m2	1	
sqm	1	
tonnes	5.6667	
m	1	
km	1	Automatically added by RAMM



The factor should be zero (0) if the Unit of Measure cannot be converted.

For instance Each can not be converted into m2. Original and adjusted amounts are both stored for each record.

Maintenance Activity Lookups

When you are working with Maintenance Activity, there are some Lookup values you will maintain. Lookup screens are all quite standard in their behaviour. For general details about working with standard screens, read the *Using RAMM* guide. Any special considerations are listed below.



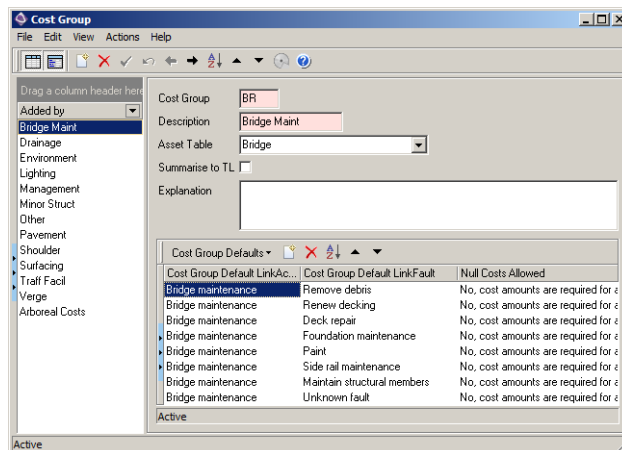
You will need to have the correct Security Permissions before you can perform this procedure. See your Systems Administrator for assistance if required.

To open the Lookup screens:

- In **RAMM**, go to the menu at the top of the **Maintenance Costs** Detail or Grid screen and follow the menu path **Actions > Maintain Lookup > [Lookup Name]**.
- In **RAMM Manager**, follow the menu path **Maintenance > Lookups > Maintenance Costs > [Lookup Name]**.
- In **RAMM Contractor**, follow the menu path **Maintenance > Costs > [Lookup Name]**.

Cost Groups

A Cost Group is a **RAMM Contractor** item used to group linked remedial Activities and Faults. Cost Groups assist the Network Owner with Network maintenance planning. They group Maintenance Costs data in **RAMM Contractor** to be transferred to **RAMM**. Cost Groups are associated with CSIs, Fault Categories or both.



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.

Activity

File Edit View Actions Help

Drag a column header here to group by that column

Description

- Administration
- Bridge maintenance
- Burn excess binder
- Cleaning
- Concrete pavement repairs
- Digouts (all pavements)
- Edge marker post maintenance
- Emergency work
- Environmental cleanup
- Fill cracks
- Footpath Maintenance
- Guardrail and barrier maint.
- In situ stabilisation
- Joint Cracks Seal
- Maintain highway lighting
- Maintain unsealed pavements
- Milling
- Minor levelling
- Positive drainage
- Pot-hole repairs
- Preset repairs
- Re-chip surfacing
- Retaining wall maint.
- Road marking maintenance
- Seal cracks
- Service cover adjustment
- Shoulder maintenance
- Sign and sight rail maint.
- Stormwater structure maint.
- Sub-soil drainage
- Surface openings
- Surface water channel improve
- Surface water channel maint.
- Surfacing defect repairs
- Testing for rehabilitation
- Traffic signal maintenance
- Upgrade
- Vegetation control and maint.

General | Convert to m²

Activity: ADMIN

Description: Administration

Explanation: Carriageway Maintenance inspections, programming, reporting

When importing transactions into the Maintenance Cost system, you can choose to calculate the cost of work by using a **Default Rate** rather than the actual rate specified in the contract between the Network Owner and the Contractor.

This is useful where the rates vary wildly between contracts or where, as in PSMC, Hybrid, and Alliance type contracts there are no specified rates. In these examples, comparing actual costs is either not useful or not possible.

You define values in the **Qty Conversion** panel below only if you use standard or default rates across all Contracts when transferring Maintenance Costs rather than the actual Contract rates as defined in the CSIs for each Claim Line.

Default rates you define for each **Unit of Measure** below should be synchronised to one date. You select this date at the **Default Rate Date** drop-down calendar below.

The **Default Rate Date** below is used with the RCI (Road Construction Index) table to convert the **Default Rates** below to rates which are valid at the date of the transaction.

Default Rate Date

Default Rate Date: 11/04/2011

Please make sure that all Rates below are valid for the Default Rate Date above.

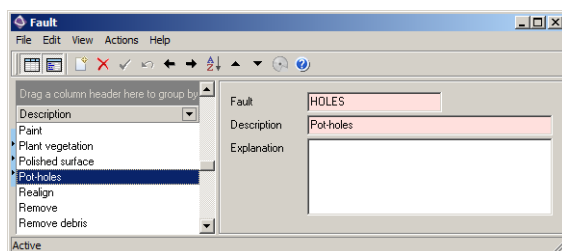
Qty Conversion

Activity UoM	Factor	Notes
LS	1	
cum	1	
each	1	
ls	1	
m	1	
sqm	1	

Active

Faults

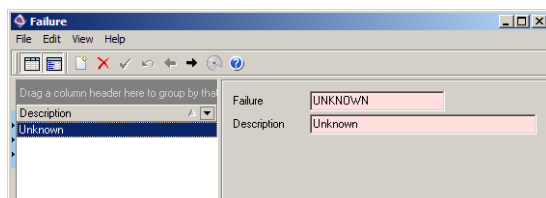
A Fault code is a **RAMM Contractor** item which identifies the weakness or defect in the Network Inventory item which gave rise to the need for maintenance. Fault codes assist the Network Owner with Network maintenance planning. They show what was repaired when the Activities were undertaken. Fault 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.



Failures

Maintenance Cost Failure categories are the causes of the Faults which were repaired. Examples are Surface Water, Subsidence and Unknown. These are exported to dTIMS. For details about working with dTIMS, see the *RAMM Forward Work Programme 2008* guide. The initial default Failure category is Unknown.

Please note that Failure in Maintenance Costs differs from Failure in **RAMM Assessment** where Inspectors Assess the Likelihood of Failure and the Consequences of that Failure. In **RAMM Assessment** the Failure of an Asset occurs when the Asset no longer functions or performs as expected.



NOTE

Failure is not commonly used and may be removed in a future version of **RAMM Contractor**.

Maintenance Costs and Dispatches

Maintenance Costs data are associated with Dispatches. You need to ensure that the Maintenance Costs values to be transferred to **RAMM** Maintenance Costs reflect your Maintenance Costs data association set up. You do this at the Maintenance Cost List drop-down list on the Claim Options tab of the Claims tab of the **Contract Details** screen. You can select:

- **Dispatch**
You would do this if you assign Maintenance Costs values to the Dispatch as a whole. You do this by associating them with the Dispatch Fault Category. See Associate Maintenance Cost Values with Dispatches (on page 82).
- **Schedule Items**
You would do this if you use the more granular approach of associating Maintenance Costs values with each individual Claim line. You do this by associating them with individual CSIs (Contract Schedule Items). See Associate Maintenance Costs Values with Claim Lines (on page 83).
- **Both**
You would do this if you use a combination of the above two options. For instance many operators associate Dayworks Dispatch Maintenance Costs values to the Fault Category, and therefore to the Dispatch as a whole, but associate Programmed Dispatch Maintenance Costs values to the CSIs and so to individual Claim lines.

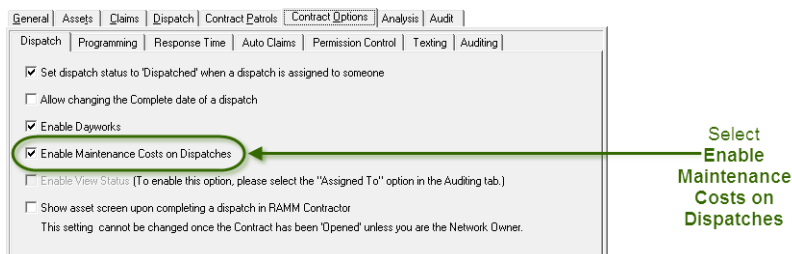
Whichever option you choose, you need to set up the Maintenance Cost List value correctly. See Maintenance Cost List (on page 225).

The screenshot shows the 'Claim Options' tab with the 'Maintenance Cost List' dropdown menu open. The options are 'Schedule Item', 'Dispatch', and 'Both'. A green circle highlights the 'Schedule Item' option, and a green arrow points from a text box to it.

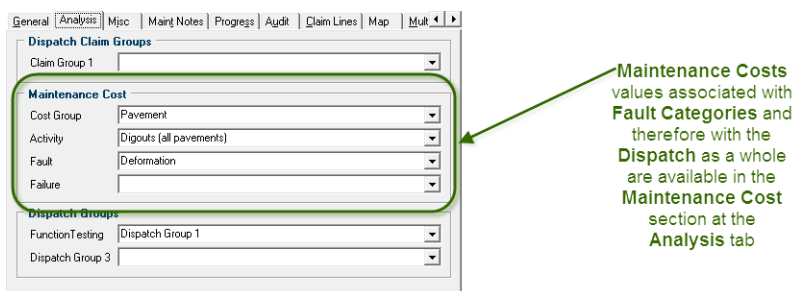
Select the Maintenance Cost List option which matches your business practices

Enable Maintenance Costs on Dispatches

If you are going to use either the first or the third option above, you need to enable Maintenance Costs on Dispatches. You do this by selecting the Enable Maintenance Costs on Dispatches option at the Dispatch tab on the Contract Options tab of the **Contract Details** screen. See Setting Dispatch Options (on page 179).



This makes the Maintenance Costs fields available in the Maintenance Cost section on the Analysis tab of the **Dispatch** maintenance screen.



Whichever option you use, you should set the Maintenance Costs values to default. This will increase efficiency and decrease errors.

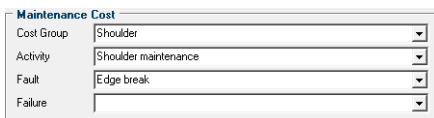
Associate Maintenance Cost Values with Dispatches

The Network Owner accounts for Network expenditure with Maintenance Costs. However, it is the Contractor who normally adds the Maintenance Activity data.

Associate Maintenance Costs at Dispatch Level

If your standard procedure is to define Maintenance Costs at Dispatch level, you do this at the Cost Group, Activity, Fault and Failure fields in the Maintenance Cost section on the Analysis tab of the **Dispatch** screen. This is useful mostly when you select the Dayworks option.

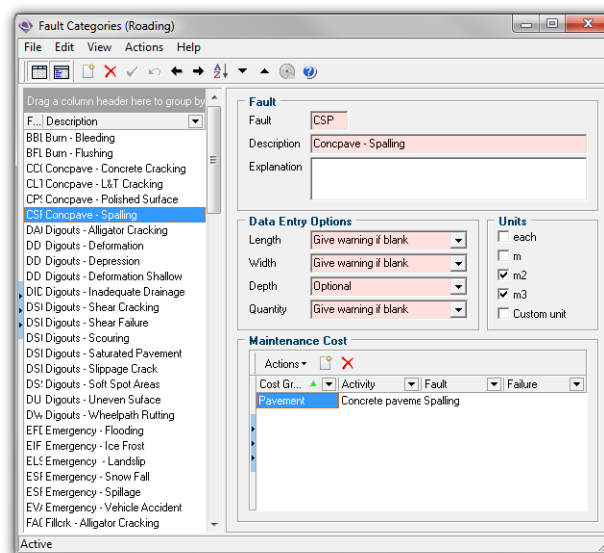
See Update Dayworks Maintenance Cost (on page 347).



Default Values for Each Fault Category

You and your operators will be more efficient and make fewer mistakes if you set up the Maintenance Costs values to default for each Dispatch. You do this by associating Cost Group, Activity, Fault and Failure values with Fault Category Codes.

See Dispatch Fault Categories (on page 107).

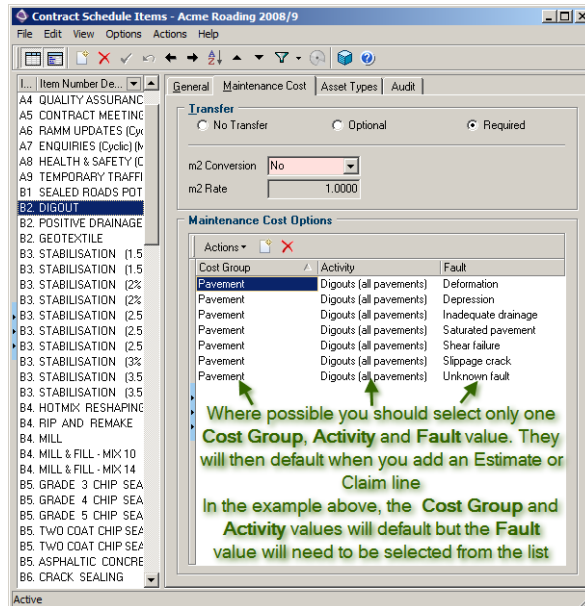


Failure is not commonly used and may be removed in a future version of **RAMM Contractor**.

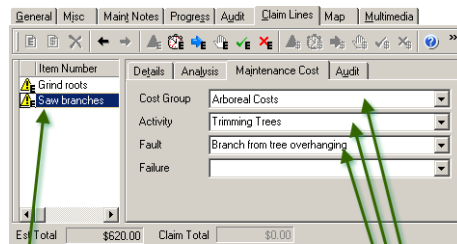
Associate Maintenance Costs Values with Claim Lines

Best practice is to associate Maintenance Costs values with each individual Claim line for each Dispatch. You can achieve this by associating Cost Group, Activity, Fault and Failure values with each CSI (Contract Schedule Item). You do this at the Maintenance Cost Options panel on the Maintenance Cost tab of **Contract Schedule Items** screen.

See Associating Maintenance Cost Items (on page 242).



This has the benefit that the Maintenance Costs values will default at the Maintenance Cost tab on the Claim Lines tab of the **Dispatch** maintenance screen.



Manual Selection

You can manually associate Maintenance Costs values with each individual Claim line for each Dispatch. You associate Maintenance Cost items to identify the spending area (Cost Group), the work that was done (Activity), the damage or weakness which made the work required (Fault) and event which led to the damage (Failure).

You select the Cost Group, Activity, Fault and Failure values at the Maintenance Cost tab on the Claim Lines tab of the **Dispatch** screen. You do this for each individual Claim Line. Mostly, it will be compulsory to select the data from the drop-down lists because it is a Contract provision that this must be done for each Dispatch.

Maintenance Costs in RAMM

Maintenance Costs are the expenses incurred in maintaining Network Assets. Claim transactions are Transferred to **RAMM** Maintenance Costs from **RAMM Contractor** Claims or are imported into **RAMM** Maintenance Costs from an external programme.

RAMM Maintenance Costs

You use **RAMM** the **Maintenance Cost** screen to view Maintenance Activity costs over time.

Fin Yr	Cost Group	Activity	Cost Amt	RCI Amt	Source Quantity	Adj Qty	Units	Length
2009/10	Admin	Administration	\$0.00	\$0.00	1.0000	1.0000	each	0.0
2009/10	Drainage	Stormwater structure maint.	\$228.36	\$170.31	1.0000		ea	0.0
2009/10	Drainage	Stormwater structure maint.	\$461.69	\$359.23	1.0000		ea	0.0
2009/10	Footpath	Footpath Maintenance	\$307.20	\$229.11	2.4000		m2	0.0
2009/10	Footpath	Footpath Maintenance	\$307.20	\$229.11	2.4000		m2	0.0
2009/10	Footpath	Footpath Maintenance	\$302.90	\$225.90	2.4000		m	0.0
2009/10	Footpath	Footpath Maintenance	\$307.20	\$229.11	2.4000		m2	0.0
2002/03	Pavement	Pot-hole repairs	\$38.56	\$37.96	1.0000			100.0
2002/03	Traffic Facil	Sign and sight rail maint.	\$1.00	\$0.99	1.0000			10.0
2002/03	Verge	Vegetation control and maint.	\$1.00	\$0.99	1.0000			10.0
2002/03	Environment	Emergency work	\$369.48	\$358.69	369.4800			11018.0

Claim Transaction Conversion

Users have differing comparison requirements which depend on their individual circumstances. So they configure the Claim transaction Transfer settings to ensure that the Maintenance Costs comparison set created, is the one which is most meaningful to them.

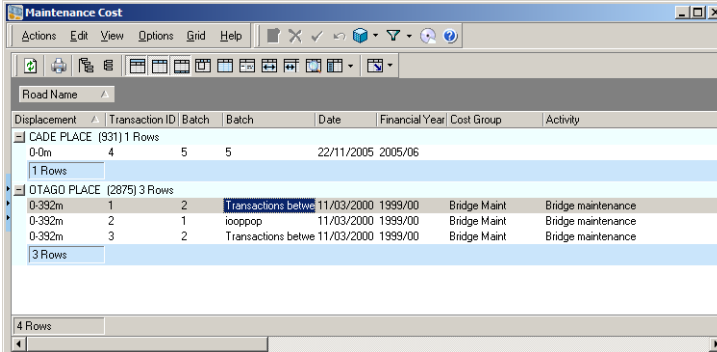
This is achieved by using Maintenance Costs Activity Default Conversion Rates or Default Conversion Factors to apply to the Maintenance Costs transactions during the Transfer or import process.

Viewing Maintenance Activity Details

When you are working with Maintenance Activity, you can view Maintenance Activity details in the standard **RAMM** Grid and Detail screens. You can also view the Batch Header of the batch which contains the Maintenance Activity details. You launch **RAMM Manager** to maintain Maintenance Activity details. You can view Maintenance Activity details in **RAMM**.

► To View Maintenance Activity Details

- 1 Press  to open the **Maintenance Cost** Grid screen.



Displacement	Transaction ID	Batch	Batch	Date	Financial Year	Cost Group	Activity
CADE PLACE (931) 1 Rows							
0.0m	4	5	5	22/11/2005	2005/06		
1 Rows							
OTAGO PLACE (2875) 3 Rows							
0-392m	1	2	Transactions betwe	11/03/2000	1999/00	Bridge Maint	Bridge maintenance
0-392m	2	1	iooppop	11/03/2000	1999/00	Bridge Maint	Bridge maintenance
0-392m	3	2	Transactions betwe	11/03/2000	1999/00	Bridge Maint	Bridge maintenance
3 Rows							
4 Rows							

- 2 For any particular record in the grid, you can open a Detail screen by either double-clicking in the row or by following the menu path **View > Detail**.

Maintenance Cost

Actions Edit View Options Help

← → ↕ ?

General

Multimedia

Amount

Cost Amount\$2,984.00

Source Quantity44444.0000 m

Date11/03/2000

Adjusted Quantity44444.0000

Financial Year1999/00

Cost Amount PCI\$3,217.88 as at 31/03/2002

Maintenance Performed

Cost GroupBridge Maint

ActivityBridge maintenance

FaultUnknown fault

Failure

Map Coordinates

Easting2999999.0000

Northing2888888.0000

Location

Displacement0 - 392 m

Work PositionBoth sides

Miscellaneous

Batch2

Transaction ID1

External ID

Asset1

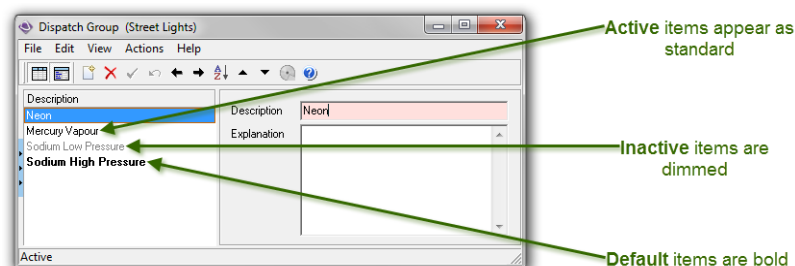
Analysis CodeBridge History

Asset Type Groups

Asset Type Groups are user-configurable groups which you set up so that you can analyse Dispatches or Claim Lines for the same Asset Type.

Once these Groups are set up and being used you can filter and report in the usual manner. See the Filtering chapter of the *Using RAMM* guide.

If you want to group Dispatches or Claim Lines by the Contract rather than by Asset Type, you use Contract Dispatch and Claims Groups. See Dispatch Group (on page 137) and Claim Group (on page 140).



In This Chapter

Introduction to Asset Type Groups	90
Dispatch Groups for Asset Types	91
Adding a Dispatch Group	92
Claim Groups for Asset Types.....	94
Adding a Claim Group.....	95

Introduction to Asset Type Groups

Asset Type Groups are user-configurable groups which you set up so that you can analyse Dispatches or Claim Lines for the same Asset Type.

You can create two kinds of Asset Type Groups:

- Asset Type Dispatch Group
- Asset Type Claim Group.

Group Set Up

You set up Dispatch and Claim Groups in the standard **RAMM** manner. You may set up only one Dispatch or Claim Group for each Asset Type.

You can set the Group to be:

- **Optional**
The drop-down list, which will be named with the Group name, will appear on the Dispatch or Claim Line and will be optional.
- **Required**
The drop-down list, which will be named with the Group name, will appear on the Dispatch or Claim Line and will be mandatory. You will not be able to save the record unless a value has been selected.
- **Not in use**
The drop-down list will not appear on the Dispatch or Claim Line and will not be available.

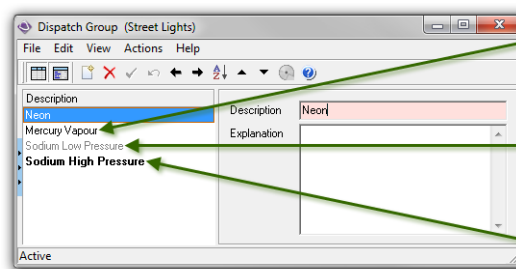
Item Description Set Up

You add Description items in the normal **RAMM** manner. You then have the option to set them as:

- **Active**
These items will be available from the Group drop-down list. You do this by selecting the Description and following the menu path **Actions > Active** to add a tick.
- **Inactive**
These items will not be available from the Group drop-down list. You do this by selecting the Description and following the menu path **Actions > Active** to remove the tick.
- **Default**
These items will be the default value in the Group drop-down list. You do this by selecting the Description and following the menu path **Actions > Default**.



If you want the Default value to appear in the drop-down list you must set it as Active as well as Default.



Active items appear as standard

Inactive items are dimmed

Default items are bold



The most reliable and convenient method of setting Default values is at the **Column Default Values** screen. You select Dispatch Group 2 under the Dispatch Entry table. See Setting a Default Value for a Field (on page 206).

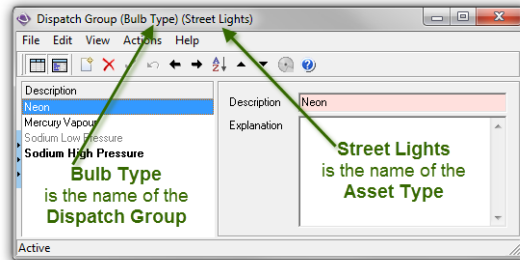
Analysis

When you have set up your Groups and associated the Dispatches and Claims, you can then filter and report on the Dispatches and Claims in the normal **RAMM** manner. See the Filtering chapter of the *Using RAMM* guide.

Dispatch Groups for Asset Types

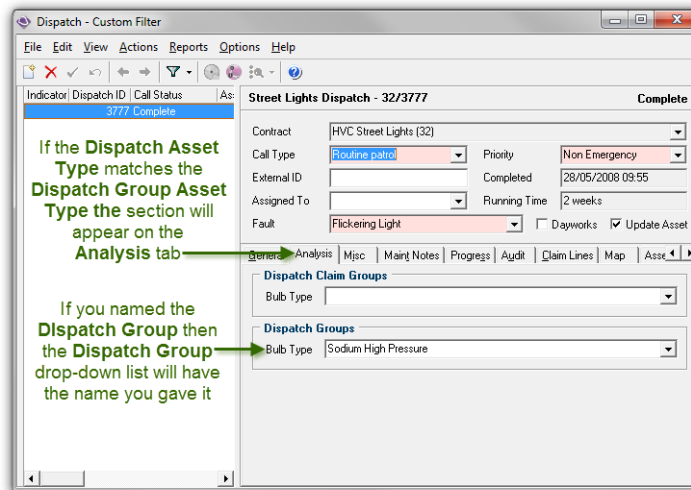
Asset Type Dispatch Groups are used to group Dispatches for a particular Asset Type. They are generally Network Owner options as they are Contract-independent and can be used for a series of Contracts regardless of the Contractor.

The **Dispatch Group** maintenance screen has the name of the Asset Type in the Title Bar. After you have named the Dispatch Group, that name will appear too.



Dispatch Screen

When adding Dispatches with an Asset Type matching that of the Dispatch Group, a Dispatch Groups section will appear at the Misc tab of the **Dispatch** maintenance screen. If the Dispatch Group was set as Required at the **Dispatch Group** dialog, then you must select a value before the record can be saved.



Adding a Dispatch Group

Introduction

Asset Type Groups are user-configurable groups which you set up so that you can analyse Dispatches or Claim Lines for the same Asset Type.

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.

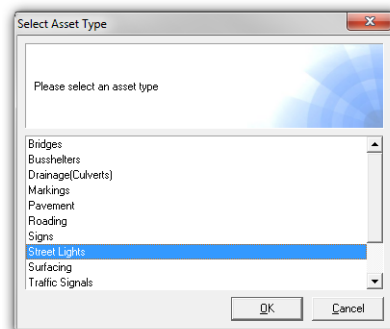
Before you do this you need to have:

- added the initial Contract details. You do this at the General tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a logical Dispatch Group naming, ranking and default value system which matches your business practices.

Menu Path

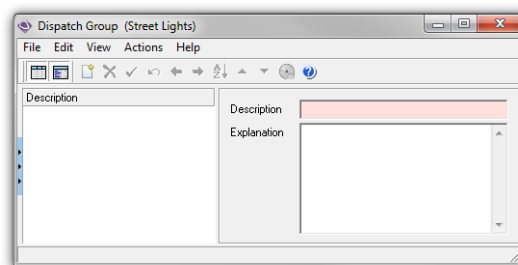
Follow the menu path Maintenance > Asset Type Groups > Dispatches to open the **Select Asset Type** dialog with a list of available Asset Types.

► To Add a Dispatch Group

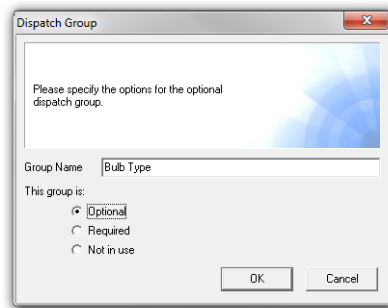




To do this you follow these steps:

- 1 Select the Asset Type.
- 2 Press .
The dialog will close and the **Dispatch Group (Asset Type)** screen will open.



- 3 Follow the menu path **Actions > Modify Group Details**.
The **Dispatch Group** dialog will open.

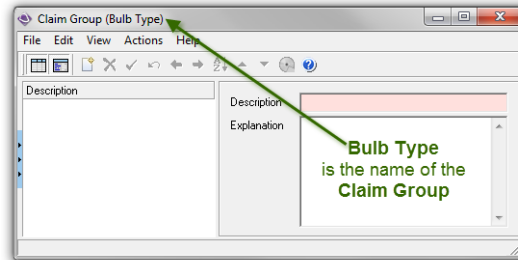


- 4 Type the name of the Dispatch Group in the Group Name field.
- 5 Select whether the Group will be **Optional**, **Required** or **Not in use**.
- 6 Press .
The dialog will close and you will be returned to the **Dispatch Group (Asset Type)** screen.
- 7 Press CTRL+N or  to add a new record.
- 8 Type in the **Description** field the descriptive value which you want to appear in the **Dispatch Group** drop-down list in **RAMM Contractor** and in **Pocket RAMM**. Make this as short as possible.
- 9 Type useful explanatory notes in the **Explanation** field. 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.
- 10 Press  to save the record.
- 11 If you want to add another code, go to step 7. Otherwise, go to step 12.
- 12 Close the screen in the normal manner to be returned to the **RAMM Contractor** main screen.

Claim Groups for Asset Types

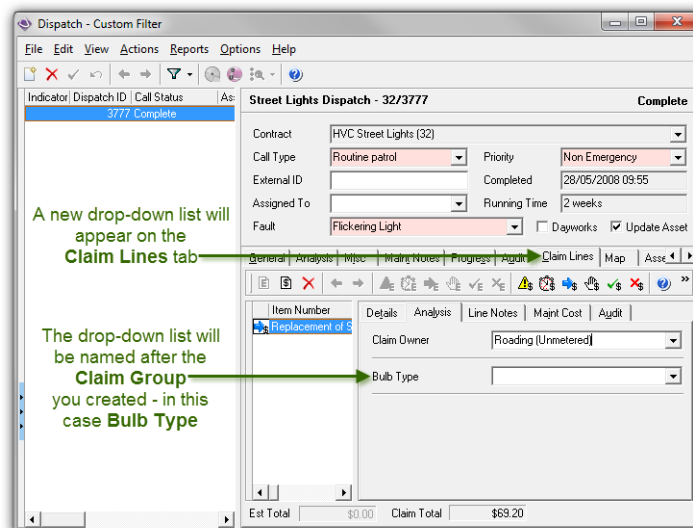
Asset Type Claim Groups are used to group Claim lines for a particular Asset Type. They are generally Network Owner options as they are Contract-independent and can be used for a series of Contracts regardless of the Contractor.

The **Claim Group** maintenance screen has the name of the Asset Type in the Title Bar. After you have named the Claim Group, that name will replace the name of the Asset Type.



Dispatch Screen

When adding Dispatches with an Asset Type matching that of the Claim Group, a new drop-down list will appear at the Claim Lines tab of the **Dispatch** maintenance screen. If you have set the Claim Group as Required at the **Claim Group** dialog, then you will need to select a value before the Claim Line record can be saved.



Adding a Claim Group

Introduction

Asset Type Groups are user-configurable groups which you set up so that you can analyse Dispatches or Claim Lines for the same Asset Type.

Asset Type Claim Groups are used to group Claim lines 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.

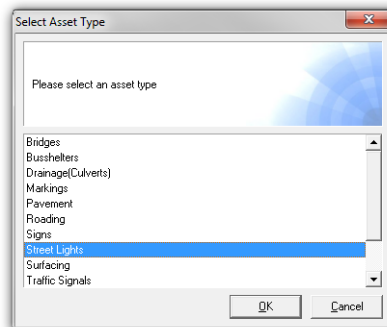
Before you do this you need to have:

- added the initial Contract details. You do this at the General tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a logical Claim Group naming, ranking and default value system which matches your business practices.

Menu Path

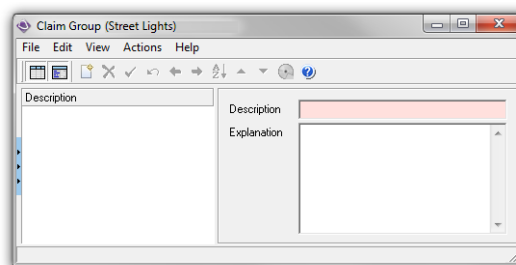
Follow the menu path Maintenance > Asset Type Groups > Claims to open the **Select Asset Type** dialog with a list of available Asset Types.

► Adding a Claim Group

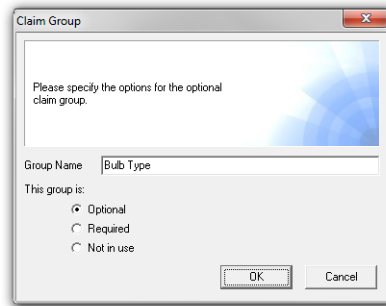


To do this you follow these steps:

- 1 Select the Asset Type.
- 2 Press .
The dialog will close and the **Claim Group (Asset Type)** screen will open.



- 3 Follow the menu path Actions > Modify Group Details.
The **Claim Group** dialog will open.



- 4 Type the name of the Claim Group in the Group Name field.
- 5 Select whether the Group will be Optional, Required or Not in use.
- 6 Press . The dialog will close and you will be returned to the **Claim Group (Asset Type)** screen.
- 7 Press CTRL+N or to add a new record.
- 8 Type in the **Description** field the descriptive value which you want to appear in the **Claim Group** drop-down list in **RAMM Contractor** and in **Pocket RAMM**. Make this as short as possible.
- 9 Type useful explanatory notes in the **Explanation** field. 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.
- 10 Press to save the record.
- 11 If you want to add another code, go to step 7. Otherwise, go to step 12.
- 12 Close the screen in the normal manner to be returned to the **RAMM Contractor** main screen.

Dispatch Parameters

All Dispatches require a **Call Type** code and a **Fault Category**. So you create them to match your business practices. If you want to add **Progress Notes** you will also need to define **Event Codes**.

Every Dispatch must have an associated **Call Type** code. **Call Types** are important as they allow a **Contract Manager** to see immediately the source of a Dispatch. You can analyse **Call Types** to show how **Faults** are reported.

You create **Fault Categories** so the reason for a Dispatch is clear. Dispatches are created so that **Faults** can be repaired. So before you can create a Dispatch, you must have created the appropriate **Fault Category**.

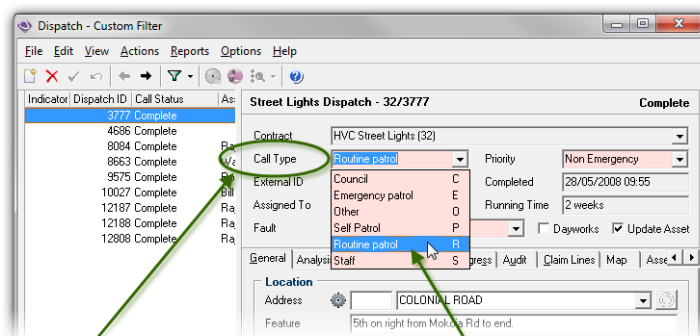
Event Codes are used in **Progress Notes** to create an audit trail of changes made to a Dispatch. The **Event Codes** may be specified by the **Network Owner** to make tracking Dispatch progress standard and readily understandable.

In This Chapter

Dispatch Call Types	100
Adding Dispatch Call Types	102
Event Codes	103
Adding Progress Note Event Codes	106
Dispatch Fault Categories	107
Defining Dispatch Fault Categories.....	109

Dispatch Call Types

Every Dispatch must have an associated Call Type code. You add these at the **Call Types** maintenance screen. See Adding Dispatch Call Types (on page 102).



Call Type codes you define become available from the Call Type drop-down list on the Dispatch maintenance screen

Call Type Purpose

Call Types allow a Contract Manager to see immediately the source of a Dispatch. A Dispatch, for instance, sourced from a Network Engineer, is likely to be more accurate and reliable than one from a member of the public who might not correctly identify the Fault. So the Contract Manager may want to check the Fault prior to sending a maintenance crew to repair it.

Call Types can also help prioritise Dispatches. You would want to deal with Dispatches with a Call Type of Emergency Patrol before those of Routine Patrol.

Call Type Analysis

You analyse Call Types to show how Faults are reported. You could analyse Call Types to find out whether calls from the public are increasing or decreasing.

Call Types Are Asset Type Specific

You define a Call Type set for each Asset Type in the Contract because the source of calls varies dependent upon the Asset Type. For instance, if you have a Signs Contract you may only receive calls from your Patrols and from council staff.

Default Call Types

When you first set up a Contract in **RAMM Contractor** there are default Call Type codes for only the three Asset Types. These are Signs, Street Lights and Traffic Signals. The default values are:

- C (Council)
- E (Emergency Patrol)
- O (Other)
- P (Public Call)
- R (Routine Patrol)
- S (Staff)

Caller, Patrol and Other

In the Dispatch Entry Detail Panel section of the **Call Types** maintenance screen, you can select the set of fields to appear in the Caller Details section on the Misc tab of the **Dispatch** maintenance screen when operators are adding Dispatches. These options enable operators to identify individuals, Patrols or companies.

Dispatch Entry Detail Panel

☒ Caller ☐ Patrol ☐ Other

EXAMPLE : Caller details

First Name: Joe Phone no.: 123-454321

Surname: Bloggs

Caller

If you accept the default Caller option in the Dispatch Entry Detail Panel section, the Caller Details section will display on the Misc tab of the **Dispatch** maintenance screen when operators adding Dispatches select the particular Call Type.

Caller Details

First Name: Grant Phone No.: 09 123 4567

Surname: Mackenzie Mobile No.: 021 098 765

Patrol

If you select the Patrol option in the Dispatch Entry Detail Panel section, the Patrol Details section will display on the Misc tab of the **Dispatch** maintenance screen when operators adding Dispatches select the particular Call Type.

Patrol Details

Patrol: Milford Monthly Urban

Period: 01/07/2008 12:00 pm to 01/07/2008 11:59 pm

Other

If you select the **Other** option in the Dispatch Entry Detail Panel section, the Reported By section will display on the Misc tab of the **Dispatch** maintenance screen when operators adding Dispatches select the particular Call Type.

Reported By	
Company	RAMM Software Ltd
Phone No.	09 415 3744
Contact	Grant Mackenzie
Mobile No.	021 123 4567

Adding Dispatch Call Types

Introduction

You create **Call Types** to identify the source of Fault reports. This can assist with Dispatch priority. It also enables analysis of Fault reporting. **Call Types** are specific to each Asset Type as the range of sources of Fault reports is likely to vary by Asset Type.

Signs, Street Lights and Traffic Signals have a default set of **Call Types**.

Before you do this you need to have:



- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a logical **Call Type** naming system which matches the contract provisions
- a copy of the contract to which to refer if necessary.

Menu Path

Follow the menu path Maintenance > Dispatch > Call Types > (select Asset Type) > (press OK) to open the **Call Types** maintenance screen for the Asset Type selected.

► To Add Dispatch Call Types

To do this you follow these steps:

- 1 Press CTRL+N or  to add a new record.
- 2 Type in the **Call Type** and **Description** fields the descriptive values which you want to appear in the **Call Type** drop-down list on the **Dispatch** maintenance screen. These may have to match the contract provisions. The **Call Type** field value may only be one alphanumeric character. The **Description** may contain up to thirty alphanumeric characters.
- 3 Select the **Dispatch Entry Detail Panel** option. See **Dispatch Call Types** (on page 100) for details.
- 4 Press  to save the record.
- 5 If you want to add another **Call Type** code for this Asset Type, go to step 1. Otherwise, go to step 6.
- 6 Close the screen in the normal manner to return to the **RAMM Contractor** main screen.

Event Codes

You use **Event Codes** in **Progress Notes** to create a manual audit trail of changes made to a **Dispatch**. These are recorded at the **Progress** tab on the **Dispatch** maintenance screen.

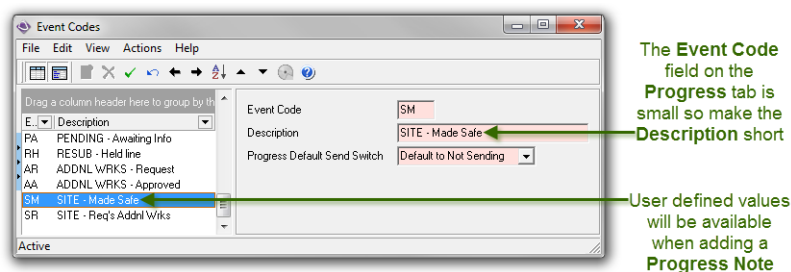
Manual Progress Note Event Codes

You can add **Progress Notes** without using an **Event** code. This is not recommended. Even though you can filter on both the user-defined **Event** codes and the **Message Text**, there is no guarantee that the users will have been consistent in their wording.

You should define an agreed set of **Event** codes if you intend adding manual **Progress Notes**.

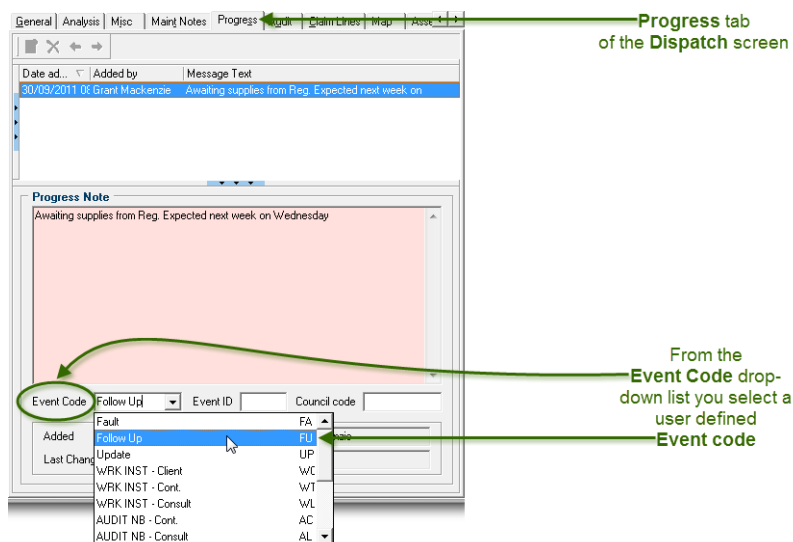
An example could be the **Event Code** AS to indicate that you are **Awaiting Stock** and therefore cannot proceed with the **Job** until they arrive.

Both the Contractor and the Network Owner can view and add Progress Notes and Event codes. You add user-defined Event codes at the **Event Codes** screen. See Adding Progress Note Event Codes (on page 106).



Event Code Drop-down List

The Event code descriptions which you define will be available at the Event Code drop-down list at the Progress tab of the **Dispatch** maintenance screen when you are adding manual Progress Notes. So you need to make them short as the field display is quite small. Only the user-defined set will be available. The standard set of default **RAMM Contractor** Event code values is not available at the drop-down list.

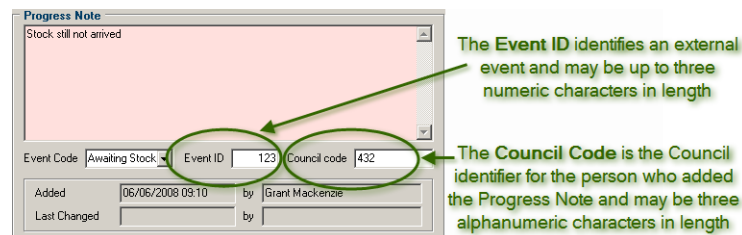


You can not use the default Event code set to add your own manual Progress Notes. Their functions have been replaced by the system Audit functions. See Auditing (on page 200).

Event ID and Council Code

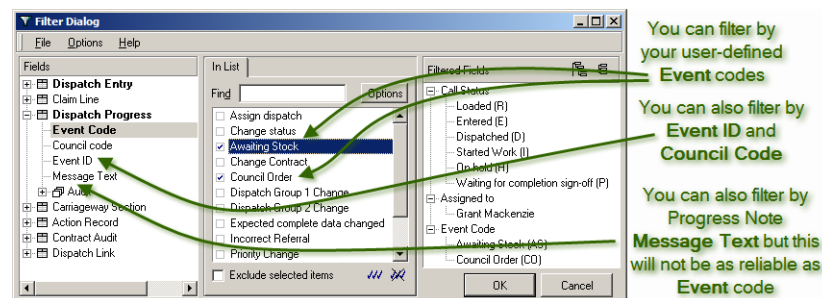
You can add a number to identify a specific external event. The number may be up to three numeric characters in length. You do this at the Event ID field.

You can add a code so that the Network Owner can identify the person who added the Progress Note. The code may be up to three alphanumeric characters in length. You do this at the Council code field.



Filter by Event Code

If you need to report on or check Dispatch progress you can filter by Event code, Council code, Event ID and by the text of the Progress Note.



Progress Default Send Switch

In earlier versions of **RAMM Contractor** it was possible to have system-generated emails sent on the creation of a manual Progress Note. This was governed by the Progress Default Send Switch setting in the Event code. This no longer functions and should be ignored.



You should leave the Progress Default Send Switch option set to Don't Send.

Adding Progress Note Event Codes

Introduction

An Event code is a **RAMM Contractor** item. You create and use them to make tracking Dispatch progress standard and readily understandable. Event codes can be an internal user-defined set to ensure consistency and comprehensibility or may be specified in the contract with the Network Owner. You can filter by Event code.

You can add only Event codes which are used in manual Progress Notes. You can not use system Event codes in manual Progress Notes.

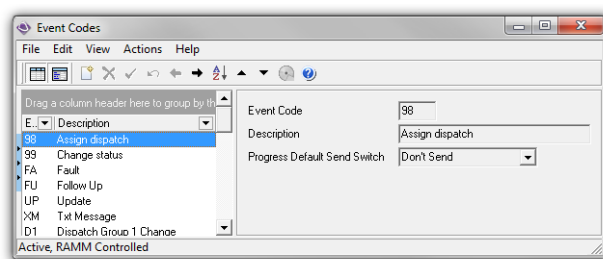
Before you do this you need to have:

- added the initial Contract details. You do this at the General tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a logical Event code naming system which matches the contract provisions and your business practices
- a copy of the contract to which to refer if necessary.


Menu Path


Follow the menu path Maintenance > Dispatch > Event Codes to open the **Event Codes** maintenance screen. The default system Event codes will be greyed out and unable to be entered or edited.

► To Add Progress Note Event Codes



To do this you follow these steps:

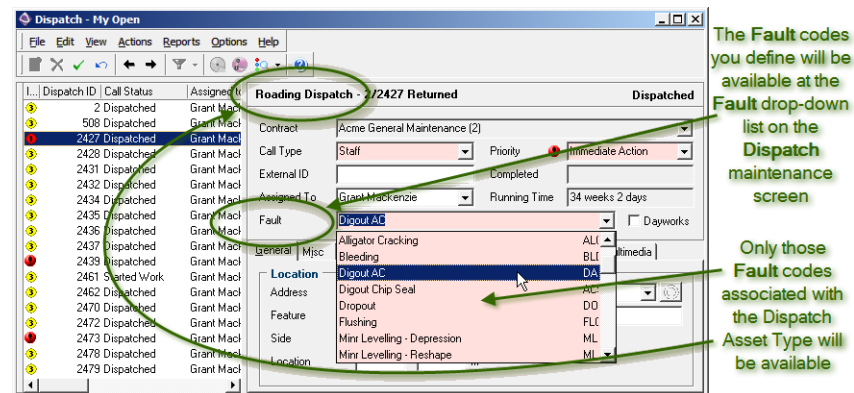
- 1 Press CTRL+N or  to add a new record.
- 2 Type the Event code in the Event Code field. This value may be up to two alphanumeric characters long.
- 3 Type in the Description field value which you want to appear in the Event Code drop-down list on the Progress tab of the **Dispatch** maintenance screen. These may have to match the contract provisions. Make the description brief.
- 4 Set the Progress Default Send Switch to Don't Send, or Default to Not Sending.

- 5 Press  to save the record.
- 6 If you want to add another Event code, go to step 1. Otherwise, go to step 7
- 7 Close the screen in the normal manner to be returned to the **RAMM Contractor** main screen.

Dispatch Fault Categories

Every Dispatch must have an associated Fault Category.

You define these at the **Fault Categories** maintenance screen. See Defining Dispatch Fault Categories (on page 109).



Fault

Fault Categories describe 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.

Asset Type Link

Before you can add a Fault Category, you must choose an Asset Type.

The Fault Category code then becomes available at the Fault drop-down list on the **Dispatch** maintenance screen only if:

- you selected its associated Asset Type when adding the Dispatch
- the Contract for which you are adding a Dispatch is for only that Asset Type in which case the Asset Type will default.

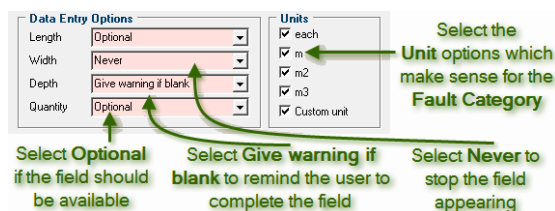
Default Fault Categories

When you first set up a Contract in **RAMM Contractor** there will be at least one default Fault Category code for each Asset Type. This is the OTH Other - free format Fault Category. This is the one used when the Fault for the Dispatch does not have an existing matching Fault Category code.

If there has been a Contract for set up previously in the database you are using, then the Fault Categories set up for the Asset Types in that Contract will be available when setting up the new Contract.

Data Entry Options

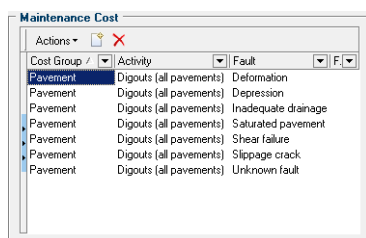
For each Fault Category, you have the option to define whether the user should add the dimensions of the Fault to the Dispatch. When you add a Dispatch and select a value from the Fault drop-down list, a Dimensions section will become available on the General tab if you have selected Optional or Give warning if blank at the upper three Data Entry Options fields on the **Fault Categories** maintenance screen.



Maintenance Cost Options

If you associate Maintenance Costs values with the Dispatch as a whole, rather than by individual Claim line, then you would associate Maintenance Costs values with Fault Categories. This may be most useful when the Contract allows for Dayworks.

You can set default Maintenance Cost values for the Fault Category. In the graphic below, the Cost Group and Activity values are the same and so will default for Dayworks Dispatches for the Fault Category. The user then has the Fault values from which to choose.



Defining Dispatch Fault Categories

Introduction

You create **Fault Categories** so the reason for a Dispatch is clear. Dispatches are created so that **Faults** can be repaired. So before you can create a Dispatch, you must have created the appropriate **Fault Category**.

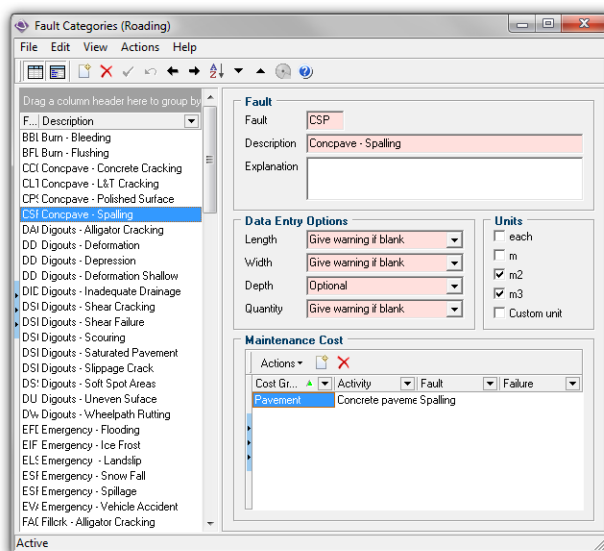
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- added your **Cost Groups**. You do this at the **Maintenance Cost** tab of the **Contract Schedule Item** screen. See Cost Groups (on page 78).
- Added your **Activity** codes. You do this at the **Activity** maintenance screen. See Activities (on page 79).
- Added your **Fault** codes. You do this at the **Fault** maintenance screen. See Faults (on page 80).
- a logical **Fault Category** naming system which matches the contract provisions and your business practices
- a copy of the contract to which to refer if necessary.

Menu Path



Follow the menu path Maintenance > Dispatch > Fault Category > (select Asset Type) > (press OK) to open the **Fault Categories** maintenance screen for the Asset Type selected.

► To Define Dispatch Fault Categories



To do this you follow these steps:

- 1 Press CTRL+N or . A new record opens.
- 2 Type in the **Fault** and **Description** fields the code and the descriptive values which you want to appear in the **Fault** drop-down list on the **Dispatch** maintenance screen. These may have to match the contract provisions. The **Fault** field value may be up to three alphanumeric characters in length.
- 3 You now set the **Data Entry Options**. You select the appropriate values from the **Length**, **Width**, **Depth** and **Quantity** drop-down lists. This determines which fields will be available in the **Dimensions** section of the **General** tab of the **Dispatch** maintenance screen. See the **Data Entry** section of **Dispatch Fault Categories** (on page 107). For instance, if the **Fault Category** were **Digout**, all the fields would be used. If the **Fault Category** were **Vehicle Accident** for a **Signs Contract** then only the **Quantity** field would be required.
- 4 You now select or clear the options in the **Units** section. You select the appropriate values to determine which measurement units will be available from the unnamed **Units** drop-down list in the **Dimensions** section of the **General** tab of the **Dispatch** maintenance screen. See the **Data Entry** section of **Dispatch Fault Categories** (on page 107). For instance, if the **Fault Category** were **Digout**, all the options would be selected. If the **Fault Category** were **Vehicle Accident** for a **Signs Contract** then only the **Each** and perhaps the **Custom Unit** options would be selected.
- 5 In the **Maintenance Cost** section press to add a new record.
- 6 Select the **Cost Group**, **Activity** and **Fault** values at the drop-down lists which appear in the panel.
- 7 Press to save the record.

- 8 If you want to add another **Maintenance Cost** set, go to step 5, otherwise, go to step 9.
- 9 Use the  and  arrows to rank the **Fault Categories** so that the ones used most are at the top of the list.
- 10 If you want to add another **Fault Category** code for this Asset Type, go to step 1. Otherwise, close the screen in the normal manner.

**NOTE**

Failure is not commonly used and may be removed in a future version of **RAMM Contractor**.

Staff Permissions

You manage access to **RAMM Contractor** by setting Staff Permissions. You do this to limit the actions of users to those areas of **RAMM Contractor** to which they need access in order to be able to perform their normal work tasks.

For **RAMM** modules other than **RAMM Contractor**, Staff Permissions are normally created and maintained in **RAMM Manager**. You can do this for **RAMM Contractor** as well but this is not recommended.

The Staff Permissions in **RAMM Contractor** are created on a Contract by Contract basis. So when you give a staff member rights and privileges, they apply only to the particular Contract you have open. If you have a number of Contracts and a staff member with the same duties in both is a simple matter to copy the Staff Permissions from one Contract to the other. See Copying Staff Permissions from Another Contract (on page 129).

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RAMM Contractor Security Overview

RAMM Contractor enables you manage user access and permissions by a combination of Security Zones, global security parameters, preset Security Groups and individual Security Profiles.

Security Zones

The Security Zone for a Contract limits all Contract users to a preset group of Roads.

See Security Zones and **RAMM Contractor** (on page 114).

Global Security Parameters

The Global Security switch is an efficient method of granting preset levels of database access.

See Global Security Switch (on page 115).

Preset Security Groups

Security Groups are an efficient method of granting preset levels of access for Contractor and Network Owner staff in standard roles.

See Assigning a User to a Security Group (on page 122).

Individual Security Profiles

Where the Global and preset Security Groups do not match the Staff Permission Set required for a particular staff member, you define an individual Security Profile for the user.

See Setting Custom Security Permissions (on page 125).

Security Zones and RAMM Contractor

The Network Owner sets up Security Zones in the database before the Contract is set up. To find out more about setting up Security Zones see the Security chapter of the *Working with RAMM* guide.

Divide the Network into Contract Areas

Security Zones are used to divide the Road Network into Network Management Areas. These Zones are then used to manage access to sections of the Road Network in the **RAMM** Database.

Within **RAMM Contractor**, it is possible, for instance, to have two or more Maintenance Contractors working within a Local Authority Network each with responsibility for part of the Network.

Security Zones are very flexible and can be defined to divide up the Road Network into portions by any criteria. So you can define the Security Zones so that the Contractors can access Network details relevant only to their own Contract not any Network details relevant to the other Contracts.

A Collection of Roads

At its basic level, a Security Zone is a portion of the Network defined as a collection of Roads. You can choose to select all the Roads in a geographical area and call them a Security Zone. Alternatively, you could pick a group of Roads with a common characteristic such as **Unsealed**, wherever they may occur within the Network and call it another Security Zone.

Entire Network

When Security Zones were introduced, some standard definitions were automatically put in to the **RAMM** Database. In the case of a Local Authority Database, one Security Zone called Entire Network, was automatically placed into the database. In the case of a State Highway Database, in addition to the Entire Network, Security Zones were created for each **RAMM** Region, Network Management Area and for each Contract Area within the NMA.

You would only grant a Contractor access to the Entire Network if the Contract requires this.

Global Security Switch

The Global Security switch is an efficient method of granting preset levels of database access.

RAMM Security uses a Global Switch. This sits on top of the individual switches and allows you to set a specific range of values across all the individual switches in one go. This switch has five settings:

- No Access
- View Only

- Contractor
- Full Control
- Custom Settings.



If you use this Global Setting to set a user to View Only it means that all the individual permission switches for that user are set to View Only. Setting No Access has the effect of denying a user any access at all to the **RAMM** Database. Contractor enables the use of preset **RAMM Contractor** Roles. Full Control gives the user just that - permission to access anything and to run any process. Using Custom Settings gives you access to the individual permission switches so you can personally tailor the Permissions for a user.

Staff Permissions Process

When setting up a Contract, the Contract Managers for the Contractor and the Network Owner each add their respective staff to the Contract and set their Staff Permissions.

Generally, the Contract Manager for the Contractor adds him or herself and the Contract Manager for the Network Owner at the **Contract Managers** section on the General tab of the **Contract Details** screen.

The Contractor Contract Manager adds all the Contractor staff and sets their Staff Permissions before opening the Contract.

When the Contract is opened, the person named in the Contract Manager On behalf of Network Owner field in the Contract Managers section on the General tab of the **Contract Details** screen becomes enabled and has Permission to add staff and associate them with the Network Owner Security Groups. The Contract Manager for the Network Owner then adds all the Network Owner staff and sets their Staff Permissions.

Step	Action	Comments
1	The Contractor and the Network Owner send staff list to RAMM Software Limited .	If these staff members have not been enabled on the RAMM Hosting Service , they will not be able to access the database. See Contract Set Up (on page 30).
2	The Contractor Contract Manager adds all Contractor staff to the Contract.	You do this at the Select User to Add screen. See Adding Staff to a Contract (on page 118).

Step	Action	Comments
3	The Contractor Contract Manager assigns one staff member to each Security Group.	You do this at the Staff Permissions maintenance screen. You set up only one staff member per group because you are going to copy the Permissions for the other staff at the same level. See Assigning a User to a Security Group (on page 122).
4	The Contractor Contract Manager sets custom Security Permissions for one staff member at each Security Group level.	You do this at the Details tab of the Staff Permissions maintenance screen. If you set up the custom Staff permissions for one member of a Security Group, you can drag and drop the Permission set onto other users at the same level. See Setting Custom Security Permissions (on page 125).
5	The Contractor Contract Manager drags and drops the appropriate custom Staff Permissions on to each user.	You do this at the Users panel of the Staff Permissions maintenance screen. See Copying Staff Permissions (on page 127).
6	Alternatively, the Contractor Contract Manager sets custom Security Permissions for all staff members at each Security Group level in turn.	You do this at the Alternate View of the Staff Permissions maintenance screen. This screen enables you to select Permissions and grant access to users in bulk. See Using the Alternate View (on page 131).
7	The Network Owner Contract Manager carries out steps two to six.	The most appropriate person to add Network Owner staff and to set their Staff Permissions is the Contract Manager. See Adding Staff to a Contract (on page 118).

Contract Staff

The Network Owner and the Contractor will both have staff who need to be given access to the database.

Normally the Contract Managers will each do this for their own staff.

The Contract Managers are the persons named at the **Contract Managers** section on the **General** tab of the **Contract Details** screen.

Contract Managers		
	On behalf of Network Owner	Contractor
Organisation	Hill Valley District Council	Acme Contractors Ltd.
Contract Manager	John Johnson	Bill Bilson
Contact		

The Contract Managers for the Network Owner and the Contractor control Contract Permissions for their own staff

Give a List to RAMM Software Ltd

When you are adding a staff member to the Contract their name will appear in the Name field on the **Select a User to Add** screen. This will occur only if you have sent a list of the staff to [RAMM Software Limited](#).

This list needs to include:

- the name of the user such as John Jones
- a contact number for the user such as their mobile phone number or their direct dial
- their user or login name such as johnj



NOTE

RAMM Software Limited staff will set up access to the database for the users and will allocate them a password which they may change.

When you have set their Staff Permissions, users can log in to the database with the level of access which you have set.

Adding Staff to a Contract

Introduction

You manage access to **RAMM Contractor** by setting Staff Permissions. You do this to limit the actions of users to those areas of **RAMM Contractor** to which they need access in order to be able to perform their normal work tasks.

When someone needs access to your **RAMM** Database, you will need to create a Security record for them.




NOTE

You will need to have the correct Security Permissions before you can perform this procedure. See your Systems Administrator for assistance if required.

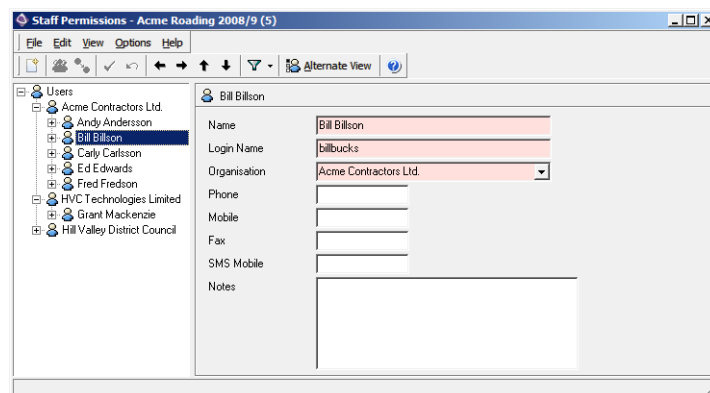
Before you do this you need to have:

- given the list of staff members to [RAMM Software Limited](#) so that they can set them up on the database.
- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- the correct Security Permissions.


Menu Path

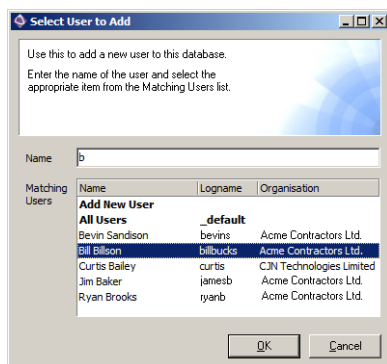
Follow the menu path (add initial Contract details) > (press Staff Permissions ) to open the **Staff Permissions** maintenance screen. It will be named using the actual Contract description.

► To Add Staff to a Contract



To do this you follow these steps:

- 1 Press Add New Record .
The **Select User to Add** screen opens.
- 2 Highlight Add New User in the **Matching Users** section
- 3 Start typing the name of the user in the **Name** field. When you start typing, you will see a list of all the people who are users of the [RAMM Hosting Service](#) whose names match the initial letters you have typed. As you type, the list will progressively grow smaller as **RAMM** performs a match against the name you are typing. When you see the name you want, select it. If you have **RAMM** installed locally, you will need to type the name of the person in full.



- 4 Press .

The screen closes and you are returned to the **Staff Permissions** screen. The staff member has been added and appears in the list under your organisation. The known details for the staff member will have defaulted into the relevant fields.

- 5 You should now type in the following user details if the fields are blank:

- **Name**
This value should have defaulted. It is the full name of the person.
- **Login Name**
This value should have defaulted. It is the name the person uses to log in to your **RAMM** database. This must be completed accurately for your Security to work properly. An incorrectly typed login name may result in the person having no access to the Database.
- **Organisation**
This value should have defaulted. It is the name of the Organisation to which the person belongs. Once you have selected the value from the drop-down list the person will be listed under the name of the Organisation on the left hand side of the screen. You must complete this mandatory field.
- **Phone**
The land line telephone number of the person
- **Mobile**
The mobile phone number of the person
- **Fax**
The fax number of the person
- **SMS Mobile**
The mobile phone number of the person on which they receive SMS text messages.
- **[Notes]**. Free-format notes about this user.

- 6 Press ☒ to save the record.

- 7 If you want to add another staff member then go to step 2. If not, go to step 8.

- 8 You now need to set Staff Permission access levels. Go to Assigning a User to a Security Group (on page 122).



When you add staff using **RAMM Manager** you must specify the Security Zone to which they will have access. In **RAMM Contractor**, the Contract is already limited to a Security Zone so the staff member is automatically limited to this one.

Security Groups

Security Groups are an efficient method of granting preset levels of access for Contractor and Network Owner staff in standard roles.

Preset Security Groups

There is a range of preset Security Groups in **RAMM Contractor** for Contractors and Network Owners.

The Network Owner Security Groups are:

- Contract Manager
- Operations Administrator
- Field Auditor.

The Contractor Security Groups are:

- Contract Manager
- Operations Administrator
- Field Supervisor
- Field Crew.

You use these to set access levels for your staff. Then when you add a user to the database you can choose a Security Group for that person rather than set up individual Permissions.

For instance, the field crew **Pocket RAMM** users who carry out Dispatches under the Contract are likely to all need the same Permission set. It is far more efficient to assign the Security Group **Field Crew** to these users than to create a Permission set for each user when added.



You cannot edit the standard Security Groups. You can associate a user with a standard Security Group, then customise their Staff Permissions and then drag and drop the Permission set onto other users. See Setting Custom Security Permissions (on page 125). See Copying Staff Permissions (on page 127).

Assigning a User to a Security Group

Introduction

Assigning a user to a Security Group sets the database access level for the user. Security Groups are preset and you can not change them.




You will need to have the correct Security Permissions before you can perform this procedure. See your Systems Administrator for assistance if required.

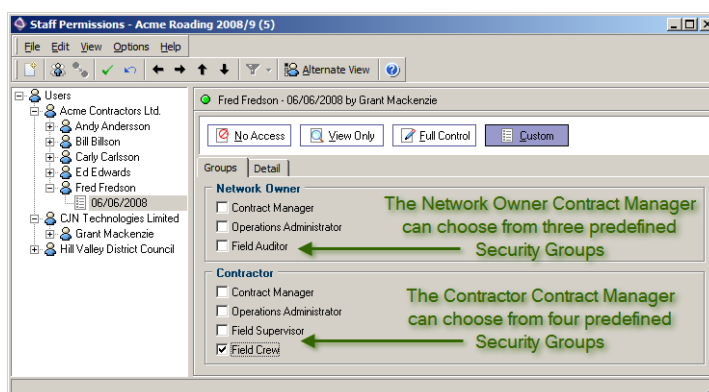
Before you do this you need to have:

- launched **RAMM Contractor**
- added the user. You do this at the **Select a User to Add** screen. See Adding Staff to a Contract (on page 118).


Menu Path


Follow the menu path Maintenance > Contract Details > (press Staff Permissions ) to open the **Staff Permissions** maintenance screen. It will be named using the actual Contract description.

► To Assign a User to a Security Group



To do this you follow these steps:

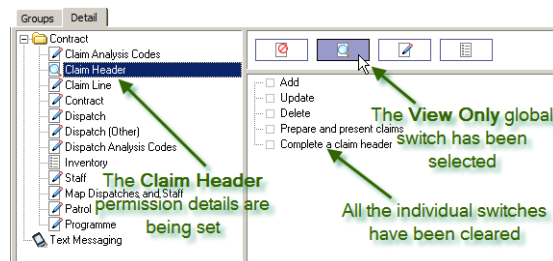
- 1 A dated RAMM Permissions Profile will be available beneath the name of the new user. If you can not see it then press the adjacent Plus button  and the tree will open revealing the dated Profile record.
- 2 Select the check box for the Security Group for the user. In the example above, **Field Crew** has been selected for field worker Fred Fredson.

- 3 Save your changes by pressing **Save Record**  or CTRL+S.
- 4 You can see the actual permissions granted by pressing the **Detail** tab and navigating through the list.
- 5 If you want to customise the Staff Permissions for this user then see Setting Custom Security Permissions (on page 125). Otherwise close the screen in the usual manner.

Custom Security Permissions

Where the Global and preset Security Groups do not match the Staff Permission Set required for a particular staff member, you define an individual Security Profile for the user.

To do this you use a range of switches covering different aspects of the data and **RAMM Contractor** functions. Each of these switches, such as the one used to enable a user to maintain Claim Headers, has a hierarchical series of preset levels defined. For instance, this allows you to give a user view-only access so they can see but not touch, or to give them view and update access. The latter case would allow a user to make changes to the Contract Headers.

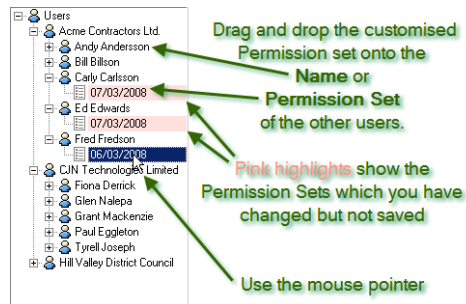


Options to Grant Permissions in Bulk

If a particular staff member has a unique role, you will have to create an individual Permission set for that person. However, most of your staff are more likely to need one of a small number of standard Permission sets which you create. Setting Staff Permissions individually for a large team of users would be time consuming and the possibility for error would be high. There are two ways to grant identical Staff Permissions in bulk.

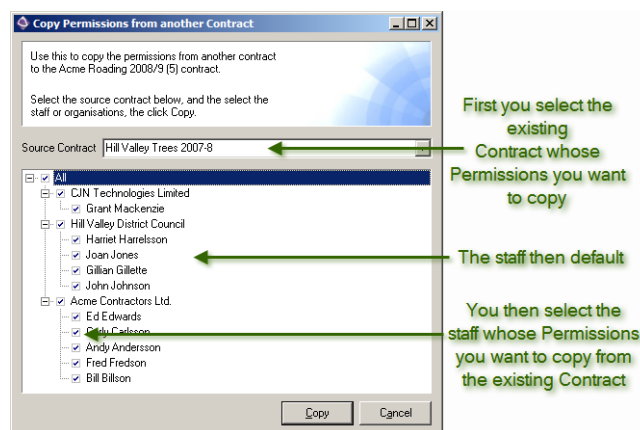
Drag and Drop

You can set up one user with a customised Permission set and then drag and drop the Permission set onto the name or Permission set of all the users who need it.



Copy Permissions from Another Contract

The fastest way to grant your staff Contract Permissions is to copy the Permissions from an existing Contract. This works only if the Staff have already been granted the correct Permissions in an existing Contract to which you have access.



Use the Alternate View


You may find it convenient to use the **Alternate View** of the **Staff Permissions** screen. As you can see in the graphic below, the names of the staff are listed in the (unnamed) **Staff** panel on the right. You select the check box for each user to whom you want to grant Permissions.

Users who have Full Control for the User Permission Group are greyed out and unable to be edited. They have all the Permissions and do not need any more.

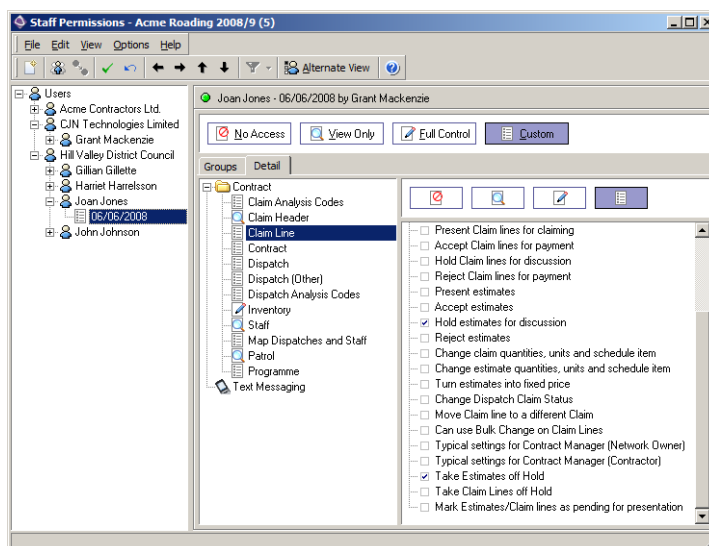
You select the User Permissions Group from which you want to grant Permissions from the (unnamed) User Permissions Group drop-down list. The Permissions tree then becomes available in the panel below.

- associated the user with a standard Permission Group. You do this at the **Staff Permissions** screen. See Assigning a User to a Security Group (on page 122).



Menu Path

Follow the menu path Maintenance > Contract Details > (press Staff Permissions ) to open the **Staff Permissions** maintenance screen.

► To Set Custom Security Permissions



To do this you follow these steps:

- 1 Highlight the user in the (unnamed) Users list panel.
- 2 Press the Plus button  adjacent to the name of the person on the left hand side of the screen. When the tree opens, select the RAMM Permissions Record from beneath the user.
- 3 Press the Detail tab.
- 4 Press the icon for the Permissions you want to grant.
The Permissions tree will appear in the (unnamed) Permissions list panel.
- 5 Select or clear the relevant Permissions for this user. In the example above, the icons for Hold estimates for discussion and Take Estimates off Hold have been selected.
- 6 If you want to grant Permissions from another group, go to step 4. Otherwise go to step 7.
- 7 Save your changes by pressing Save Record  or CTRL+S.
A new Profile record with the data entry date is created beneath the name of the user.



When you make changes to user Permissions, **RAMM** tells the Informix database to align its internal permissions (Connect, Resource, DBA) accordingly. This happens automatically when you close the **Staff Permissions** screen after making changes. If you want to manually grant or revoke permissions, you go to the menu at the top of the **Staff Permissions** screen and choose **File > Grant/Revoke**.

This special control commits the changes you make to a Permissions record to a database, allowing you to continue working with the **Staff Permissions** screen.

Copying Staff Permissions

Introduction


Most of your staff are likely to need one of a small number of standard Permission sets which you create. You set up one user with the correct customised Permission set and then drag and drop the Permission set onto the name or Permission set of all the users who need it.

Setting Staff Permissions individually for a large team of users would be time consuming and the possibility for error would be high. You can use drag and drop to optimise this process.

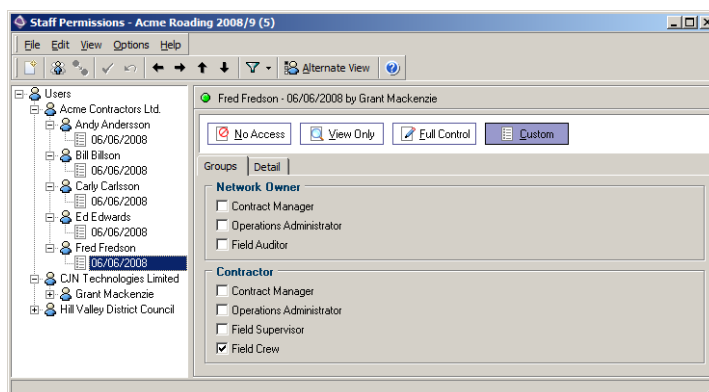
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- added the users. You do this at the **Select a User to Add** screen. See Adding Staff to a Contract (on page 118).
- granted the user the custom Permission set. You do this at the **Staff Permissions** screen. See Setting Custom Security Permissions (on page 125).


Menu Path

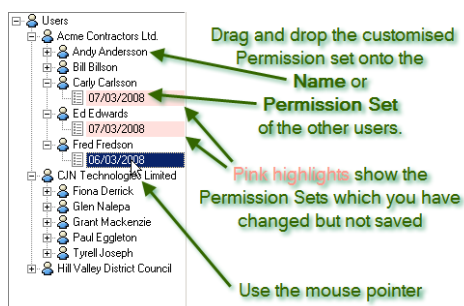
Follow the menu path **Maintenance > Contract Details > (press Staff Permissions **) to open the **Staff Permissions** maintenance screen. It will be named using the actual Contract description.


► To Copy Staff Permissions



To do this you follow these steps:

- 1 Highlight, in the (unnamed) Users list panel, the user whose Permission set you want to copy to other users.
- 2 Press the Plus button  adjacent to the name of the person on the left hand side of the screen. When the tree opens, select the RAMM Permissions Record from beneath the user.



- 3 Drag and drop the Permission set of the user on to the name or permission set of the user to whom you want to grant Permissions identical to the initially highlighted user. The Permission record of the changed user will be highlighted in pink.
- 4 If you want to do this for another user, go to step 3. Otherwise go to step 5.
- 5 Save your changes by pressing **Save Record**  or CTRL+S. A new Profile record with the data entry date is created beneath the names of the users.



When you make changes to user Permissions, **RAMM** tells the Informix database to align its internal permissions (Connect, Resource, DBA) accordingly. This happens automatically when you close the **Staff Permissions** screen after making changes. If you

want to manually grant or revoke permissions, you go to the menu at the top of the **Staff Permissions** screen and choose **File > Grant/Revoke**.

This special control commits the changes you make to a Permissions record to a database, allowing you to continue working with the **Staff Permissions** screen.

Copying Staff Permissions from Another Contract

Introduction

The fastest way to grant your staff Contract Permissions is to copy the Permissions from an existing Contract. This works only if the Staff have already been granted the correct Permissions in an existing Contract to which you have access.

Setting Staff Permissions individually for a large team of users would be time consuming and the possibility for error would be high. You can copy the Permissions from an existing Contract to optimise this process.

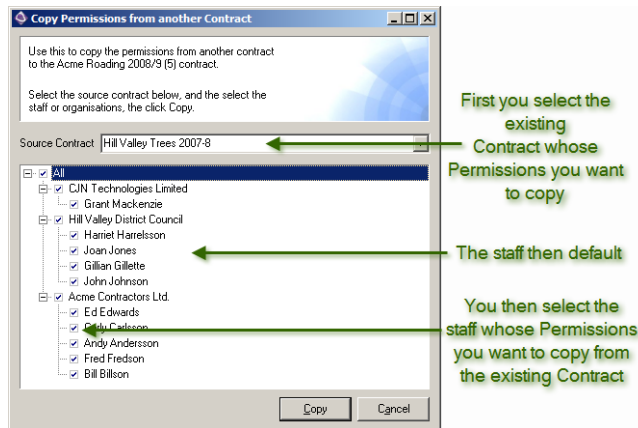
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- added the users. You do this at the **Select a User to Add** screen. See Adding Staff to a Contract (on page 118).

Menu Path

Follow the menu path **Maintenance > Contract Details > (press  Copy Permissions from another Contract)** to open the **Copy Permissions from another Contract** screen.

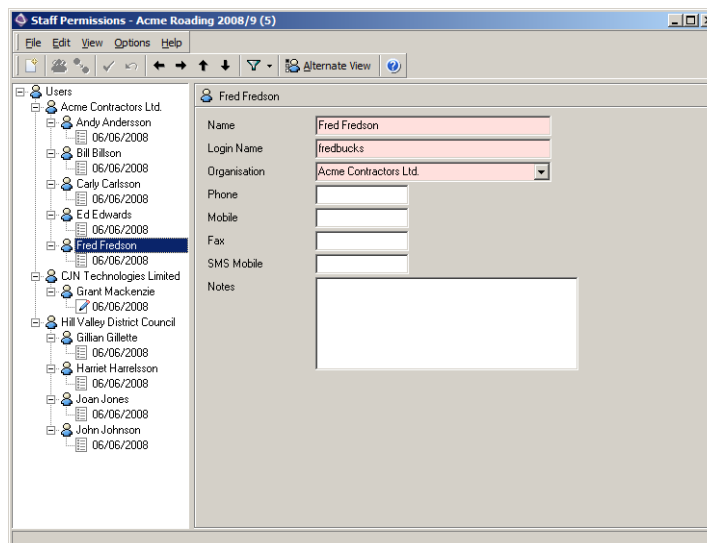
► To Copy Staff Permissions



To do this you follow these steps:

- 1 Select, from the **Source Contract** drop-down list the existing Contract whose Staff Permissions you wish to copy.
The staff names will default into the (unnamed) **Staff** list panel.
- 2 Select the check boxes adjacent to the names of the staff whose Staff Permissions you wish to be copied.
- 3 Press **Copy**.

The **Copy Permissions from another Contract** screen will close. The **Staff Permissions** screen will open with the Staff Permissions copied to the staff whom you selected.



- 4 You now have the option to customise the Staff Permissions to suit the new Contract. See Custom Security Permissions (on page 123).
- 5 Close the screen in the standard manner.



When you make changes to user Permissions, **RAMM** tells the Informix database to align its internal permissions (Connect, Resource, DBA) accordingly. This happens automatically when you close the **Staff Permissions** screen after making changes. If you want to manually grant or revoke permissions, you go to the menu at the top of the **Staff Permissions** screen and choose **File > Grant/Revoke**.

This special control commits the changes you make to a Permissions record to a database, allowing you to continue working with the **Staff Permissions** screen.

Using the Alternate View

Introduction

You may find it convenient to use the **Alternate View** of the **Staff Permissions** screen. As you can see in the graphic below, the names of the staff are listed in the (unnamed) **Staff** panel on the right. You select the check box for each user to whom you want to grant Permissions.

Users who have **Full Control** for the User Permission Group are greyed out and unable to be edited. They have all the Permissions and do not need any more.



You select the User Permissions Group from which you want to grant Permissions from the (unnamed) **User Permissions Group** drop-down list. The Permissions tree then becomes available in the panel below.

When you want to see which users have which Permissions you can use the **Alternative View** of the Security Profiles. You can also use this screen to manage Profiles for individual users if you prefer.

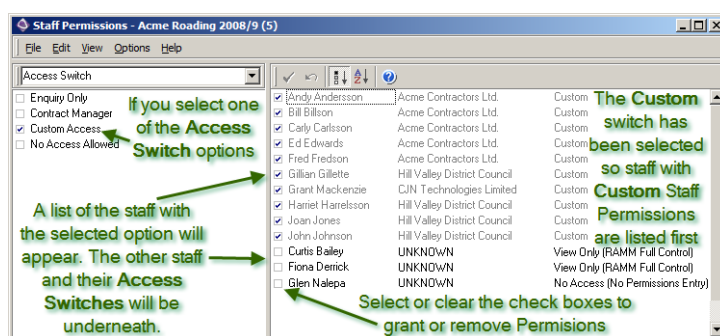
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- added the users. You do this at the **Select a User to Add** screen. See Adding Staff to a Contract (on page 118).



Menu Path

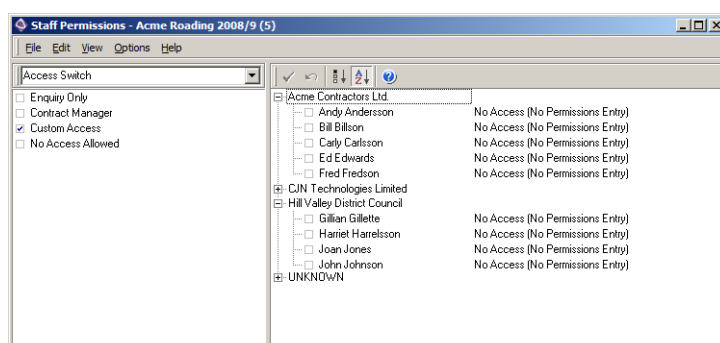
Follow the menu path Maintenance > Contract Details > (select Contract) > (press  Staff Permissions) > (press  Alternate View) Alternate View) to open the **Staff Permissions** maintenance screen in **Alternate View** mode. It will be named using the actual Contract description.

► To Use the Alternate View

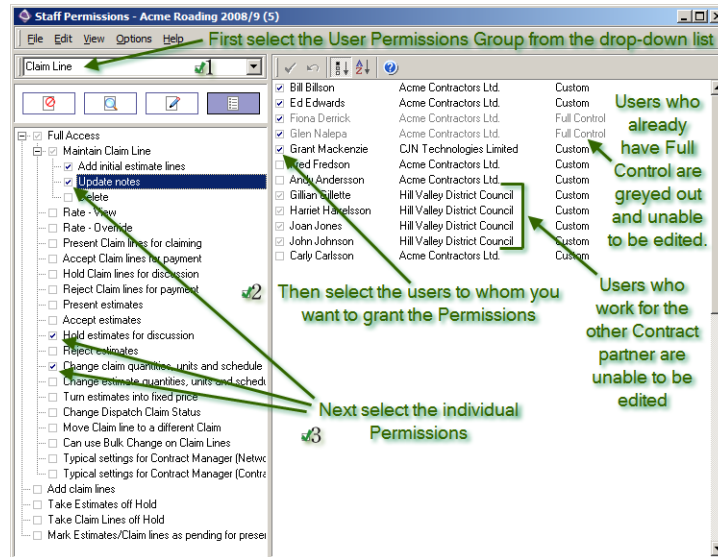



To do this you follow these steps:

- 1 The screen will open with the default value Access Switch in the (unnamed) User Permissions Group drop-down list. By default, the Sort by Check State button  will be pressed so the users will be listed by whether or not their check boxes have been selected. Press the Sort by Organisation and User button  if you want to change the display in the (unnamed) Users panel on the right hand side so that users are grouped by Organisation as in the graphic below.



- 2 You can use this screen setting to quickly grant Enquiry Only, Contract Manager, Custom Access and No Access Allowed Permissions to many users.
- 3 Select, in the in the (unnamed) User Permissions Group drop-down list, the name of the Permission set you want to grant or revoke. In the graphic below, Claim Line has been selected.



- 4 Select, in the (unnamed) Users panel on the right hand side, all the users to whom you want to grant identical access rights. In this case it is to Claim Lines.
- 5 Select the individual Staff Permissions.
- 6 Save your changes by pressing **Save Record**  or CTRL+S.
- 7 If you want to grant or revoke more permissions, go to step 3. Otherwise, close the screen in the normal way.

Analysis

The Contractor and the Network Owner will both want to analyse aspects of the Contract.

You use a combination of Dispatch Groups, Claim Groups, Contractor Account codes and Network Owner Account codes for financial and other analysis.

When you add Dispatch Groups, Claim Groups, Contractor Account codes and Network Owner Account codes, you define who has control of the Staff Permissions for the analysis tools depending on whether they are for the use of the Contractor or the Network Owner.

If you want to analyse by Asset Type you do this using Asset Type groups. See Introduction to Asset Type Groups (on page 90).

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Introduction to Analysis Tools

There are four analysis tools which you can set up for a Contract. You use them to group Dispatches or Claim lines and to assign Account codes with Claim lines for exporting to an external accounting package.

Dispatch Groups and Claim Groups

These are user-defined Contract analysis options. They are used for one specific Contract and, unlike Asset Type Groups, are not available to be used for a series of Contracts.

Contractor and Network Owner Account Codes

If you want to export Claim line financial data from **RAMM Contractor** to an external accounting package, you can set up all your relevant Account codes. You then associate them with Schedule Items. When a user selects a Schedule Item when adding a Claim line, the correct Account code is automatically defaulted.

Permissions

When you add a Dispatch Group, a Claim Group, a Contractor or Network Owner Account code, you must define who has control over the Staff Permissions for the resulting field parameters. The three Permission options are:

- Network Owner controls the user permissions
- Contractor controls the user permissions
- Both can control the user permissions.

The option you select will depend on the contract specifications. If the contract is silent, the Permissions should reflect who benefits from the use of the Dispatch Group, Claim Group, Contractor or Network Owner Account code.



Please note that you are not defining who has the right to change values in these fields. You are defining who controls the Staff Permissions. These are found in the **Detail** tab of the **Staff Permissions** screen.

Status

You can set a Dispatch Group, a Claim Group, a Contractor or Network Owner Account code field as mandatory or as optional. When you no longer require it, you can disable it.

Dispatch Group

A Network Owner owns the database containing all the Asset data. It is likely that they will have many Contracts for maintenance of the Assets represented in the database. They will want to analyse and report on Dispatches. Sometimes, they will want to group and analyse all Dispatches throughout each Contract against the database. Sometimes a Network Owner or a Contractor will want to group Dispatches from one particular Contract only.

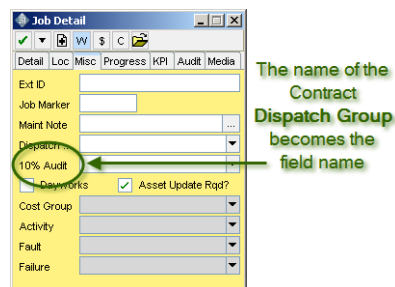
Group Dispatches for One Contract Only

You set up Contract Dispatch Groups to analyse Dispatch data for a specific Contract. You use them for analysis and reporting purposes.

For instance, if you needed perform a 10% audit of the Road Network, you could set up a Dispatch Group named 10% Audit.

Dispatch Group Name

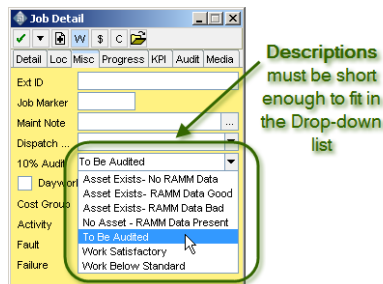
The name of the Dispatch Group should be chosen carefully as it needs to reflect your actual business practices. The other requirement for the name is that it is short as it will be the field name on the Misc tab in **Pocket RAMM**. So 10% Audit is quite a good example.



Add Short Descriptions

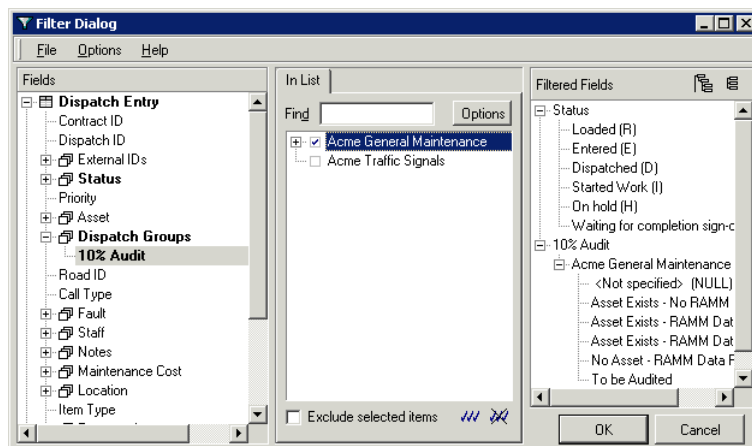
When you have saved the Dispatch Group name you add the descriptions. These become the options to select from the Dispatch Group drop-down list which will now have the name of the actual Dispatch Group. In this case it is 10% Audit.

Best practice is to use short descriptions which match your business practices. They need to be short as they will be options in a **Pocket RAMM** drop-down list.



Filter Dialog

As you can see in the graphic below, Dispatch Groups have their own section at the **Filter Dialog**. The Dispatch Group 10% Audit is shown.



Group Dispatches and Claims from all Contracts

If a Network Owner requires grouping of Dispatches or Claims over several Contracts, then Asset Type Dispatch Groups are used. See Introduction to Asset Type Groups (on page 90).

Adding Dispatch Groups

Introduction

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 set up Dispatch Groups and define individual descriptions to match your business practices.

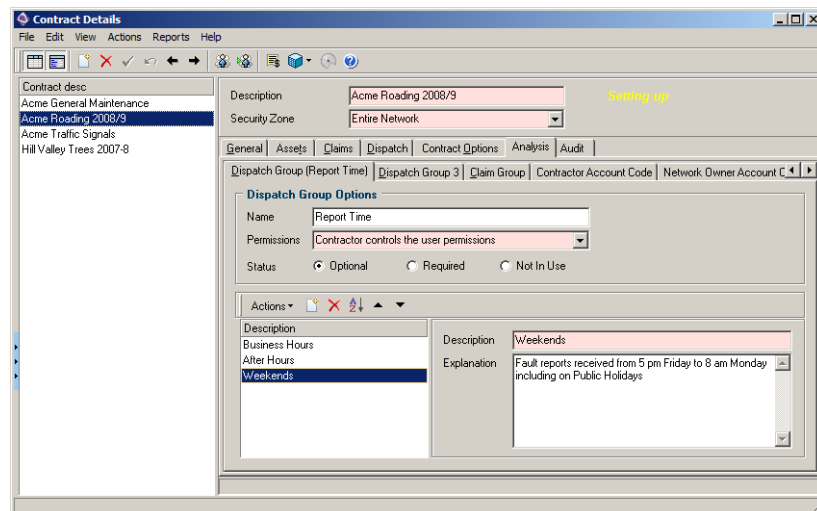
Before you do this you need to have:

- added the initial Contract details. You do this at the General tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a Dispatch Groups naming convention which matches your business practices
- a copy of the contract to which to refer if necessary.



Menu Path


- Follow the menu path (add initial Contract details) > (press Analysis) > (press Dispatch Group) to open the **Contract Details** screen at the Dispatch Group tab.

► To Add Dispatch Groups



To do this you follow these steps:

- 1 Type the name of the Dispatch Group in the **Name** field. Make this short as it becomes a field name in **Pocket RAMM**.
- 2 Select, from the **Permissions** drop-down list, the option which reflects which party or parties to the Contract should control the Dispatch Group Staff Permissions.
- 3 Select the appropriate **Status** option.
- 4 Press  to save the record and to make the **Description** section available.
- 5 Press CTRL+N or  to add a new **Description** record.
- 6 Type in the **Description** field the value which you want to appear in the Dispatch Group drop-down list in **RAMM Contractor** and in **Pocket RAMM**. Make this as short as possible.

- 7 Type useful explanatory notes in the **Explanation** field. 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.
- 8 Press  to save the record.
- 9 If you want to add another **Description** code, go to step 5. Otherwise, go to Adding Claim Groups (on page 142).

Claim Group

A Network Owner owns the database containing all the Asset data. It is likely that they will have many Contracts for maintenance of the Assets represented in the database. They will want to analyse and report on Claims. Sometimes, they will want to group and analyse all Claims throughout each Contract against the database. Sometimes a Network Owner or a Contractor will want to group Claims from one particular Contract only.

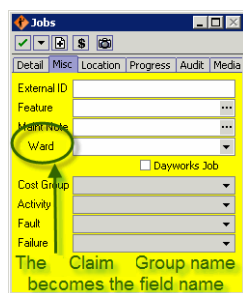
Group Claims for One Contract Only

You set up Contract Claim Groups to analyse Claim data for a specific Contract. You use them for analysis and reporting purposes.

For instance, if you were a council and needed to analyse Contract Claims by geographical area, you could set up a Claim Group named **Ward**.

Claim Group Name

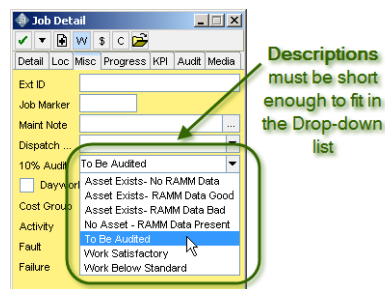
The name of the Claim Group should be chosen carefully as it needs to reflect your actual business practices. The other requirement for the name is that it is short as it will be the field name on the **Misc** tab in **Pocket RAMM**. So **Ward** is quite a good example.



Add Short Descriptions

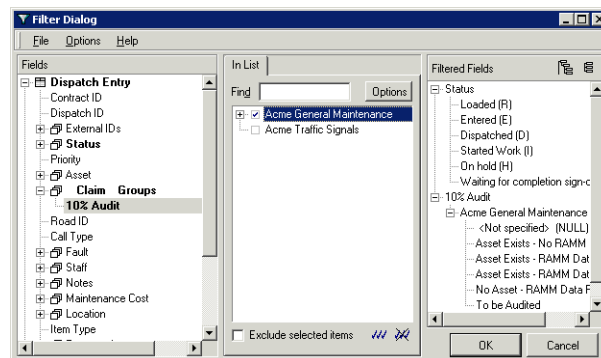
When you have saved the Claim Group name you add the descriptions. These become the options to select from the Claim Group drop-down list which will now have the name of the actual Claim Group. In the graphic below it is 10% Audit.

Best practice is to use short descriptions which match your business practices. They need to be short as they will be options in a **Pocket RAMM** drop-down list.



Filter Dialog

As you can see in the graphic below, Claim Groups have their own section at the **Filter Dialog**. The Claim Group 10% Audit is shown.



Group Claims and Claims from all Contracts

If a Network Owner requires grouping of Claims or Claims over several Contract, then Asset Type Claim Groups are used. See Introduction to Asset Type Groups (on page 90).

Adding Claim Groups

Introduction

Contract Claim Groups are used to group Claims for analysis and reporting purposes for an individual Contract. You create them only if a standard **RAMM Contractor** function to group the Claim lines does not already exist.

You set up Claim Groups and define individual descriptions to match your business practices.

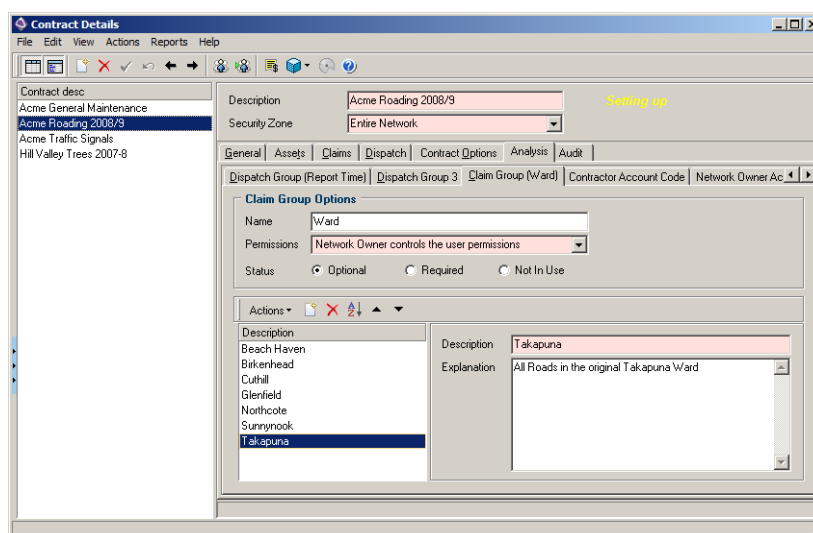
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a Claim Groups naming convention which matches your business practices
- a copy of the contract to which to refer if necessary.




Menu Path

- Follow the menu path (add initial Contract details) > (press Analysis) > (press Claim Group) to open the **Contract Details** screen at the Claim Group tab.

► To Add Claim Groups



To do this you follow these steps:

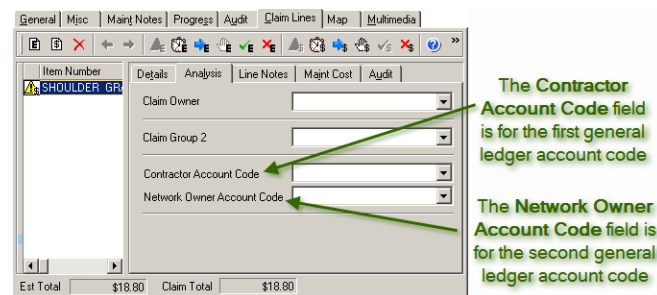
- 1 Type the name of the Claim Group in the **Name** field. Make this short as it becomes a field name in **Pocket RAMM**.
- 2 Select, from the **Permissions** drop-down list, the option which reflects which party or parties to the Contract should control the Claim Group Staff Permissions.
- 3 Select the appropriate **Status** option.
- 4 Press  to save the record and to make the **Description** section available.
- 5 Press **CTRL+N** or  to add a new **Description** record.
- 6 Type in the **Description** field the value which you want to appear in the Claim Group drop-down list in **RAMM Contractor** and in **Pocket RAMM**. Make this as short as possible.
- 7 Type useful explanatory notes in the **Explanation** field. 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.
- 8 Press  to save the record.
- 9 If you want to add another **Description** code, go to step 5. Otherwise, go to Adding Account Codes (on page 144).

Contractor and Network Owner Account Codes

Claim lines can be associated with general ledger account codes for financial analysis and reporting purposes. You add Account codes in **RAMM Contractor** and associate Contract CSIs with them. Once Claims have been accepted, the financial information at Claim line level can then be exported into an external accounting application. Both the Contractor and Network Owner can do this.

Account Codes One and Two

The Contractor Account Code and Network Owner Account Code fields on the Claim Lines Analysis tab of the **Dispatch** screen have been given names of convenience. In reality, they can be used for any general ledger account codes.



Adding Account Codes

Introduction

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.

The Contractor Account Code and Network Owner Account Code fields can be used for any general ledger account codes. The names of the fields will change to whatever value you place in the Name field.

The procedure for adding Contractor Account codes and Network Owner Account codes is the same.

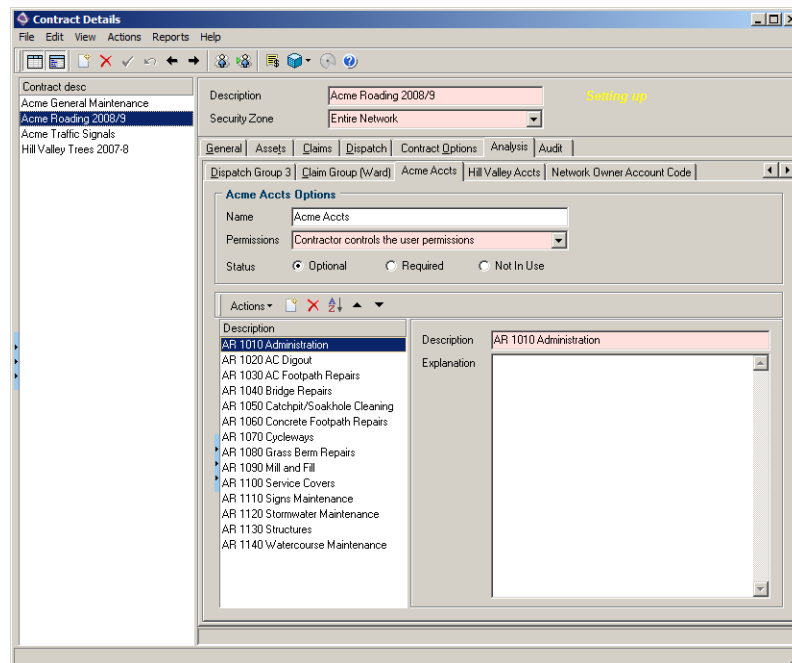
Before you do this you need to have:

- added the initial Contract details. You do this at the General tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a list general ledger account codes which match your business practices
- a copy of the contract to which to refer if necessary.

Menu Path

- Follow the menu path (add initial Contract details) > (press Analysis) > (press Contract Account Code) to open the **Contract Details** screen at the Contractor Account Code tab.

► To Add Account Codes



To do this you follow these steps:

- 1 Type the name of the general ledger account code group in the **Name** field. Make this short as it becomes a field name in **Pocket RAMM**.
- 2 Select, from the **Permissions** drop-down list, the option which reflects which party or parties to the Contract should control the account code Staff Permissions.
- 3 Select the appropriate **Status** option.
- 4 Press to save the record and to make the **Description** section available.
- 5 Press CTRL+N or to add a new **Account Description** record.
- 6 Type in the **Description** field the value which you want to appear in the **Contractor Account Code** drop-down list in **RAMM Contractor** and in **Pocket RAMM**. Make this as short as possible.
- 7 Type useful explanatory notes in the **Explanation** field. 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.
- 8 Press to save the record.
- 9 If you want to add another **Account Description** code, go to step 5. Otherwise, go to **Adding Priority Codes** (on page 149).

More Dispatch Parameters

A Dispatch is a defined piece of work for a Contractor to perform to maintain a Network. In **Pocket RAMM** it is referred to as a Job.

Dispatch Priority codes assist those who assign Dispatches and Maintenance Note Actions help those who carry them out. So you create Priority codes and Maintenance Note Actions to match your business practices. If the Contract involves the use of Patrols, you will want to add Patrol Headers.

You define Priority codes so staff who programme and assign Dispatches can tell which should be performed first. See Adding Priority Codes (on page 149).

When staff have completed a Job, they should list the actions taken to fix the fault. You define Maintenance Note Actions so that the staff can select, from a list, the actions taken to fix the fault. This makes their task easier and more consistent. See Adding Maintenance Note Actions (on page 151).

You set up Patrol Headers to enable both parties to audit the Patrol process. Contractor staff Patrol the Network to monitor and report on the condition of the Road Network and associated Assets. The Network Owner and the Contractor will want to check that the Cyclic Patrols are being performed to the required standard. See Adding Patrol Headers.

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Priority

Each Dispatch or Job must have an associated Priority code. You define these Priority options when you set up the Contract so that those staff who programme and assign them can tell which Dispatches should be performed first. Priorities can also help **Pocket RAMM** users who self-assign Jobs to make decisions for which Job to do next. You can also use Priority codes to ensure emergencies stand out from all other Dispatches regardless of Priority.

Priority Levels

The order in which the Priorities appear in the Description list panel on the Priority tab, is the order in which they will appear by default in **Pocket RAMM** Job list and in the **Claims** maintenance screen. This list order prevails over the Priority number assigned at the Priority field and the value assigned at the Map Symbol No field.

Priority and Map Symbol Numbers

The number you assign each Priority at the Priority field must be unique. No two Priorities can be added with the same value in the Priority field.

The **Map** symbol and numbers are more flexible. The value you select from the Map Symbol No drop-down list is the one which will appear on the **Map** in **RAMM Contractor** and in **Pocket RAMM**. You have ten different Priority numbers as well a Star symbol from which to choose.



Your staff may find it simpler if you limit your Priority numbers appearing on the **Map** to 1 to 3 and use the Star for all other Priorities.

Urgent Dispatches

If you select the Urgent check box, this defines the Dispatch Priority level as Urgent. A red symbol appears in **RAMM Contractor**. Jobs will be red in **Pocket RAMM**.

Print Priority on Dispatches

You can choose whether or not the Priority level will be printed on the relevant Dispatch by selecting or clearing the Print on Dispatch check box. You should select this check box for at least your most urgent Priorities.

Adding Priority Codes

Introduction

You add Priority codes to associate them with Dispatches and Jobs. Staff who programme and assign Dispatches can then tell which should be performed first. You can also use Priority codes to ensure emergencies stand out from all other Dispatches regardless of Priority.

Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a logical Priority naming and ranking system which matches your business practices.

Menu Path

Follow the menu path (add initial Contract details) > (press Dispatch) > (press Priority) to open the **Contract Details** screen at the Priority tab.



► To Add Priority Codes

The screenshot shows the 'Contract Details' window with the 'Priority' tab selected. The 'Description' field is set to 'Acme Roading 2008/9' and the 'Security Zone' is 'Entire Network'. The 'Priority' list on the left includes 'Emergency', 'Immediate', 'One Week', 'One Month', 'When Budget Allows', 'Cyclic Maintenance', and 'Minor Repairs'. The 'Emergency' priority is selected, and its details are shown on the right: 'Priority' is 1, 'Urgent' is checked, 'Description' is 'Emergency', 'Map Symbol No.' is 1, 'Print on Dispatch' is checked, and the 'Explanation' is 'Use this Priority for the highest level of Dispatch. Jobs with this Priority must be performed as soon as possible, whatever the time of day or night'.

Annotations on the screenshot:

- Select the Urgent check box to make Jobs of this Priority appear Red** (points to the 'Urgent' checkbox).
- Select the Print on Dispatch check box for a least your most urgent Priority codes** (points to the 'Print on Dispatch' checkbox).
- The list order in this panel determines the order of Dispatches in RAMM Contractor and Jobs in Pocket RAMM** (points to the 'Priority' list).
- Make this description short** (points to the 'Description' field).
- It will appear at the Priority drop-down list on the Dispatch screen in RAMM Contractor and the Jobs screen in Pocket RAMM** (points to the 'Description' field).

To do this you follow these steps:

- 1 Press CTRL+N or  to add a new record.
- 2 Type in the **Priority** field, the unique number for this record.
- 3 If you want Jobs associated with this **Priority** to appear in red in **Pocket RAMM**, select the **Urgent** check box. Otherwise, leave it cleared.
- 4 Type in the **Description** field the descriptive value which you want to appear in the **Priority** drop-down list in **RAMM Contractor** and in **Pocket RAMM**. Make this as short as possible.
- 5 Select from the **Map Symbol No** drop-down list the number or symbol which you want to appear on the **Map** to identify the Dispatch or Job.
- 6 Select the **Print on Dispatch** check box if you want the **Priority** to be automatically printed on the Job Sheet if the Dispatch is printed. You should select this check box for at least your most urgent **Priorities**.
- 7 Type useful explanatory notes for this **Priority** in the **Explanation** field. 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.
- 8 Press  to save the record.
- 9 If you want to add another **Priority** code, go to step 1. Otherwise, go to Adding Maintenance Note Actions (on page 151).

Maintenance Note Actions

Best practice, when staff have completed a Job, is to list the tasks undertaken to fix the fault. You add **Maintenance Note Actions** to make this simple and consistent.

Pocket RAMM

Maintenance Note Actions are particularly useful in **Pocket RAMM**. It is much easier for an operator to select a few check boxes than to type free form notes. So time spent setting them up is saved over the period of the Contract.

The order in which the **Maintenance Note Actions** appear in the List panel is the order in which they will be available in **Pocket RAMM**. So you should load the most used ones at the top of the list for each group

Asset Type and Fault

You may restrict a **Maintenance Note Action** to a Fault or an Asset Type. The Asset Types with which you will be able to associate **Maintenance Note Actions** are those which you chose at the **Add Asset Type** screen. See **Selecting Contract Asset Types** (on page 53). The Faults with which you will be able to associate **Maintenance Note Actions** are those which you chose at the **Contract Details** screen at the **Maintenance Note Actions** tab. See **Adding Maintenance Note Actions** (on page 151).

Reports

You can not report on Maintenance Note Actions directly. You can, however, choose to include them with the other Dispatch Notes in the Dispatch Summary Report. You enable this by selecting the Include Dispatch Notes check box on the **Print Dispatches** dialog when printing the report.

Multiple Entries

It is not possible to add one record and to use it with multiple Asset Types or Faults. If you have a large number of Maintenance Note Actions to add, there is an alternative to typing them all in.



If you have the records available in a spreadsheet, it may be possible for RAMM Software Limited to import the information for you for a fee. Please feel free to discuss this in person. Contact RAMM Software Limited (on page 26).

Adding Maintenance Note Actions

Introduction

Best practice, when staff have finished performing a Job, is to list the tasks undertaken to fix the Fault. You create Maintenance Note Actions so that **Pocket RAMM** users can easily enter notes describing what they actually did to Complete the Job.

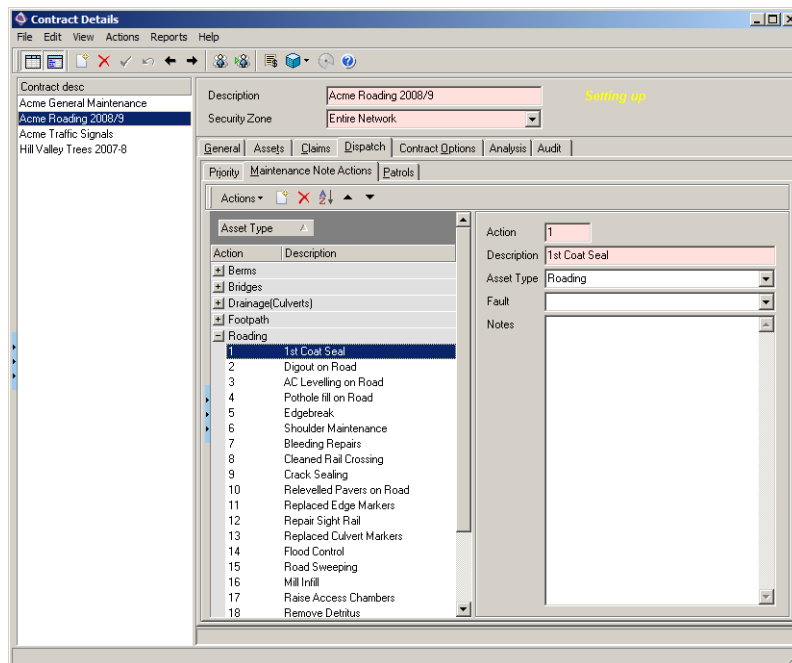
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a logical Maintenance Note Action naming and ranking system which matches your business practices.





Menu Path

Follow the menu path (add initial Contract details) > (press Dispatch) > (press Maintenance Note Actions) to open the **Contract Details** screen at the Maintenance Note Actions tab.

► To Add Maintenance Note Actions



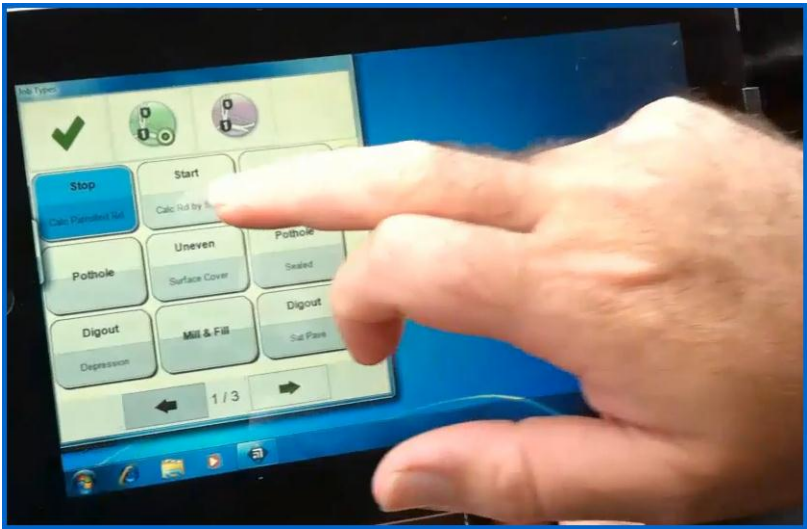
To do this you follow these steps:

- 1 Press CTRL+N or  to add a new record.
- 2 Type in the Action field, the unique number for this record.
- 3 Type in the Description field the descriptive value which you want to appear in **RAMM Contractor** and in **Pocket RAMM**. Make this as short as possible.
- 4 Select from the Asset Type drop-down list the Asset Type for this Maintenance Note Action.
- 5 If you want to restrict this Maintenance Note Action to a particular Fault, select it from the Fault drop-down list. If not, leave the field blank.
- 6 Type useful explanatory notes for this Maintenance Note Action in the Notes field. 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.
- 7 Press  to save the record.
- 8 If you want to add another Maintenance Note Action, go to step 1.
- 9 Use the  and  arrows to rank the Maintenance Note Actions so that the ones used most are at the top of the list.
- 10 Go to Adding Patrol Headers.

Contract Patrols

Patrols in **RAMM Contractor** and **Pocket RAMM** have been optimised so that Patrol operators can use touch screen devices. This means that they can add Dispatches at the press of a button. They can shift jobs on the **Pocket RAMM** map with their index finger. They can become remarkably efficient once set up is complete.

You may prefer to watch the series of videos on the [RAMM Software Limited](http://www.ramm.co.nz) web site (<http://www.ramm.co.nz>) which demonstrate how you can use **RAMM** Patrol and how you can set it up than to read about the set up in this chapter.



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Introduction to Contract Patrols

Patrols are generally Lump Sum items in a Contract and are defined in the Contract. So you set up Contract Patrols in **RAMM Contractor** to match the terms of the Contract.

Save Paperwork

RAMM Contract Patrol has been optimised to save operators from excessive paperwork when they are performing Patrols and to make the administration simple.



Press Buttons on Patrol

You set up **RAMM** Contract Patrol so that operators press buttons to start and end the Patrol, to add Jobs when on Patrol and to show that they have visited a particular Patrol Location. See Contract Patrol Set Up Process (on page 156).

If the display is a touchscreen Netbook device or similar, you can set the buttons to display in the full screen or grouped by a number of screens as below. The screen displayed is the second of the three screens with Patrol buttons.



Reports

There are many Contract Patrol reports which you can use, depending on what you want to know about the Patrol. You set up Contract Patrol so that the Reports will contain the information you require. The report below is the **Full Cyclic Patrols Details** which lists the Roads actually Patrolled and the Dispatches added on the Patrol.

Full Cyclic Patrol Details

This report shows all of the Actual Patrolled Road records along with any Dispatch IDs that were added when the Road was being Patrolled.

Drag a column header and drop it here to group by that column

Cyclic Patrol	Staff No	Activity	Time Start	Date-Time End	Road ID	Start	End	Len
29/07/2011-28/08/2011	Grant Mackenzie	Travel	2/08/2011 1:36:00 p.m.	2/08/2011 1:37:00 p.m.	ROSEDALE ROAD	1118	1384	266
29/07/2011-28/08/2011	Grant Mackenzie	Travel	2/08/2011 1:37:00 p.m.	2/08/2011 1:38:00 p.m.	TRITON DRIVE	14	637	623
29/07/2011-28/08/2011	Grant Mackenzie	Travel	2/08/2011 1:38:00 p.m.	2/08/2011 1:39:00 p.m.	ARRENWAY DRIVE	783	1032	249
29/07/2011-28/08/2011	Grant Mackenzie	Travel	2/08/2011 1:48:00 p.m.	2/08/2011 1:48:00 p.m.	ARRENWAY DRIVE	794	1007	213
29/07/2011-28/08/2011	Grant Mackenzie	Travel	2/08/2011 1:48:00 p.m.	2/08/2011 1:49:00 p.m.	TRITON DRIVE	6	635	629
29/07/2011-28/08/2011	Grant Mackenzie	Travel	2/08/2011 1:49:00 p.m.	2/08/2011 1:50:00 p.m.	ROSEDALE ROAD	1119	1409	290

There are many other Patrol reports. For instance the Patrolled Roads report can list either the Roads which have been Patrolled or those Roads which remain Unpatrolled.

You can also see on the **Map** which Roads remain Unpatrolled.

Contract Patrol Set Up Process

You set up Contract Patrols so that the Patrol operator can enter information in **Pocket RAMM** with as little effort as possible while carrying out the Patrol.



There is a logical set up order. For instance, You should not create Patrol templates, before you have set up the Activities which will become buttons in **Pocket RAMM**.

Step	Action	Comments
1	Set up Patrol Dispatch Templates.	<p>You create Patrol Dispatch Templates so that Patrol operators can add predefined Jobs in Pocket RAMM which they may then self-assign, if appropriate, or leave for others to perform. An example of this could be a Drain Inspection performed as part of a Patrol.</p> <p>You do this at the Patrol Dispatches tab on the Contract Patrols tab of the Contract Details screen.</p> <p>See Patrol Dispatches (on page 159).</p>
2	Set up Patrol Site Dispatch Templates.	<p>You create Site Dispatch Templates for tasks which a Patrol operator will perform at the same Location or on the same Asset each time they perform the Patrol. You use Site Dispatch Templates to have Dispatches plotted on the Pocket RAMM map negating the requirement for buttons.</p> <p>You do this at the Site Dispatches tab on the Contract Patrols tab of the Contract Details screen.</p>

		See Site Dispatches (on page 160).
3	Set up Contract Patrol Activities.	<p>You add a Contract Patrol Activity for each Patrol task button or Job button you want to be available in Pocket RAMM to the Patrol operator. You can associate each Contract Patrol Activity with any number of Patrol templates.</p> <p>You do this at the Activities tab on the Contract Patrols tab of the Contract Details screen.</p> <p>See Activities (on page 161).</p>
4	Set up Contract Patrol Templates.	<p>You set up a Contract Patrol Template for each Patrol defined in the Contract. These then become the templates for your regular scheduled Patrols.</p> <p>You do this at the Patrols tab on the Contract Patrols tab of the Contract Details screen.</p> <p>See Contract Patrol Templates (on page 166).</p>
5	Associate Contract Patrol Activities with a Contract Patrol Template.	<p>The Patrol operator will be expected to perform certain tasks while on Patrol. The Patrol operator may also need to add Jobs while on Patrol. You associate, with the Contract Patrol Template, those Contract Patrol Activities which represent these tasks and Jobs. These then become the buttons which are available in Pocket RAMM for that particular Patrol.</p> <p>You do this at the Activities tab in the (unnamed) Patrols Details panel on the Patrols tab on the Contract Patrols tab of the Contract Details screen.</p> <p>See Patrol Activities (on page 168).</p>
6	Define a Road set for the Patrol and associate it with the Contract Patrol Template.	<p>If the maintenance Contract lists a set of Roads to be Patrolled on a regular basis, you restrict the RAMM Contractor Patrol template to that particular set of Roads. You define the Road set and then associate it with the Patrol template. Then, when the operator is using Pocket RAMM for the Patrol, the Roads yet to be Patrolled are highlighted on the Map in Pocket RAMM.</p> <p>You do this at the Roads tab on the Patrols tab on the Contract Patrols tab of the Contract Details screen.</p> <p>See Patrol Roads (on page 170).</p>
7	Associate Site Dispatch Templates with the Contract	You associate Site Dispatch Templates with a Contract Patrol Template for tasks which the Patrol operator

	Patrol Template.	<p>performs at the same Location or on the same Asset on a regular basis. Then, when the operator starts the Patrol, there will be Dispatches to be performed already on the Pocket RAMM map.</p> <p>You do this at the Site Dispatch Templates tab on the Patrols tab on the Contract Patrols tab of the Contract Details screen.</p> <p>See Site Dispatch Templates for Patrols (on page 171).</p>
8	Specify which operators are to perform the Patrols.	<p>Once you have created your Patrol templates, you specify which Patrol operators are to perform the actual Patrols. You do this by associating Patrol Staff with Patrol templates. Then, when the operator logs in to Pocket RAMM, they will be offered only Patrols which you have determined they may perform.</p> <p>You do this at the Patrol Staff tab on the Patrols tab on the Contract Patrols tab of the Contract Details screen.</p> <p>See Patrol Staff (on page 173).</p>

Dispatch Templates

Dispatch Templates are used in **RAMM** Contract Patrols to enable a Patrol user to add a Dispatch in **Pocket RAMM** with the least possible effort and opportunity for error. The Fault Category, Description, Asset Type, Call Type and other mandatory data are defined in the template. So the **Pocket RAMM** user need only press a **Pocket RAMM** button to add a Job with all the relevant details defaulted.

General Patrol Dispatches and Site-specific Dispatches

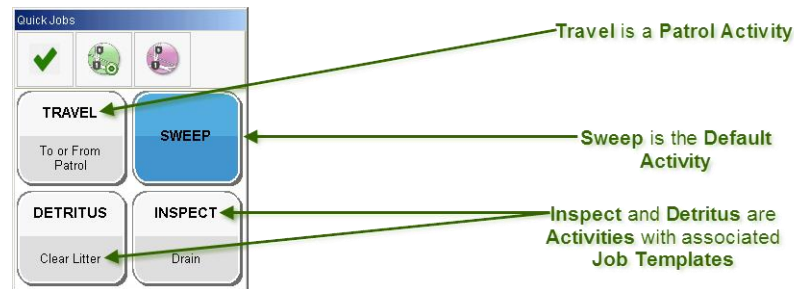
There are two types of Dispatch or Job Templates which you can set up. Patrol operators who perform the same task in a variety of Locations need Patrol Dispatches. Patrol operators who perform the same task at a particular Location may need Site Dispatches.

General Patrol Dispatch Templates

You define Patrol Dispatches for situations where Patrol operators perform regular tasks and a record must be kept for each time the task is performed. See Patrol Dispatches (on page 159).

Site-specific Patrol Dispatch Templates

You define Site Dispatches for situations where Patrol operators perform tasks which are regular, scheduled and at the same Location each time. A record is kept for each time the task is performed. See Site Dispatches (on page 160).



Patrol Dispatches

You create Patrol Dispatch Templates so that Patrol operators can add predefined Jobs in **Pocket RAMM** which they may then self-assign, if appropriate, or leave for others to perform. An example of this could be a Drain Inspection performed as part of a Patrol.

The operator would add the Dispatch and then start working on it.

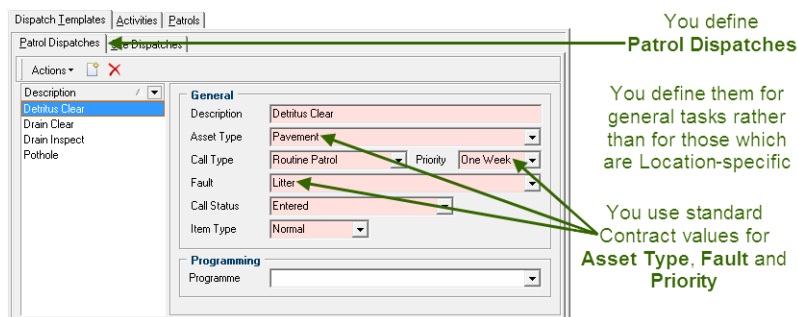
If the operator were empowered to add Pothole Dispatches, they could do so at the touch of a button. Someone else would be assigned the Dispatch.

Patrol Dispatches are for tasks which are regular tasks but are not always at the same Location. Location-dependent Dispatches are **Site Dispatches**. See Site Dispatches (on page 160).

Standard Contract Dispatch Values

When setting up Patrol Dispatch Templates you use the standard Asset Type, Call Type, Priority, Fault Category and Call Status values which have been defined for the Contract.

There is no need for Location information to be defined for Patrol Dispatches. The Location and Time Stamp details are added when the Dispatch is added and the Patrol operator starts to work on the Job.



Associated Activities

Patrol Dispatch Templates are associated with Contract Patrol Activities. This is so that a **Pocket RAMM** button for the Activity will be created. When the Patrol operator presses the **Pocket RAMM** button, a Dispatch based on the Dispatch Template will be created but with Location and time information automatically added by **Pocket RAMM**.

Programme and Dispatch Groups

You have the option to assign the Dispatch to a Programme of Works. This is most likely to be useful where you use Programming as a bucket system where all newly-created Dispatches are placed in a hold-all Programme, such as Future Dispatches. These are then checked, grouped and assigned so that they can be performed in the most efficient manner.

You can also associate the template with Dispatch Groups if you use them.

Site Dispatches

You create Site Dispatch Templates for tasks which a Patrol operator will perform at the same Location or on the same Asset each time they perform the Patrol. You use Site Dispatch Templates to have Dispatches plotted on the **Pocket RAMM** map negating the requirement for buttons.

You would create one Site Dispatch Template for each Culvert which was contractually defined as needing an inspection each period. Then, as the Patrol operator performed the Patrol associated with the Site Dispatch, the Site Dispatch specific to the Asset would appear plotted on the **Map**.

Site Dispatch Templates are for tasks which are regular and Location-dependent. Dispatches which are for tasks which are regular tasks but are not always at the same Location are Patrol Dispatches. See Patrol Dispatches (on page 159).

Standard Contract Dispatch Values

You use the standard Asset Type, Call Type, Priority, Fault and Call Status values which have been defined for the Contract. You can also associate the Site Dispatch Template with a specific Asset and a Road ID.

Dispatch Templates | Activities | Patrols

Patrol Dispatches | Site Dispatches

General

Description: Catchpit - Piermark Drive

Asset Type: Drainage(Culverts)

Call Type: Routine Patrol

Priority: Programmed Maint

Fault: SWStruct - Clean Culvert

Call Status: Entered

Item Type: Normal

Asset

Likely ID: Culvert Number

Value: 349

Location

Road ID: PIERMARK DRIVE

Side: Left

Location: 339 m

Programming

Programme:

Annotations:

- You define Site Dispatches (points to the Site Dispatches tab)
- You use standard Contract values for Asset Type, Fault and Priority (points to Asset Type, Fault, and Priority fields)
- You define Site Dispatch Templates for tasks specific to a Location or Asset (points to the Asset and Location sections)
- You associate the Site Dispatch Template with a specific Asset and Road ID (points to the Likely ID and Road ID fields)

Associated Activities

You can associate Site Dispatch Templates with Contract Patrol Activities. This is so that a **Pocket RAMM** button for the Activity will be created. When the Patrol operator presses the **Pocket RAMM** button, a Dispatch based on the Dispatch Template will be created at the Location of the operator, not the site of the specific Asset or Location.

So you might feel that there is no purpose to associating Site Dispatch Templates with Contract Patrol Activities.

Programmes and Dispatch Groups

You have the option of assigning the Site Dispatch Template to a Programme. You would only do this if the task for the Site Template were a part of Programmed Maintenance.

You can also associate Site Dispatch Templates with Dispatch Groups if you use them.

Activities

Activities are the tasks or duties which an operator performs on Patrol.

For example, a worker might first drive the Patrol vehicle to the start of the Patrol, then sweep the Roads, inspect the Drains and clear them as required. So a means of entering these four tasks or duties into **Pocket RAMM** is required.

Activities Become Pocket RAMM Buttons

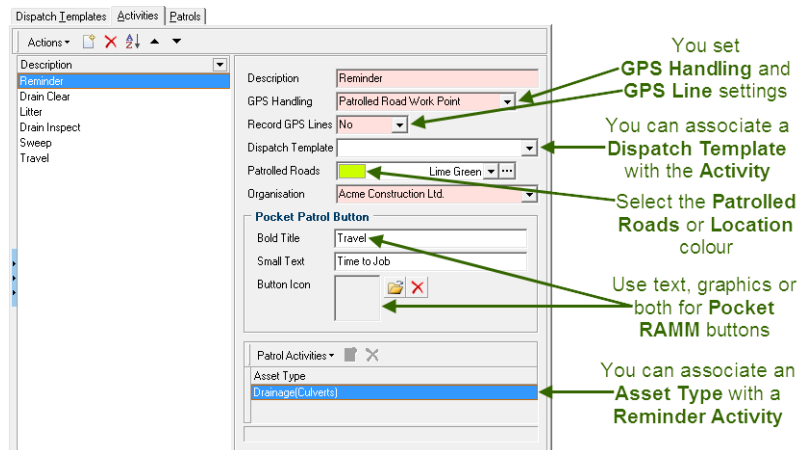
You add a Contract Patrol Activity for each Patrol task button or Job button you want to be available in **Pocket RAMM** to the Patrol operator. You can associate each Contract Patrol Activity with any number of Patrol templates.

You do this by creating Contract Patrol Activities in **RAMM Contractor**.



Add Contract Patrol Activities

You add Contract Patrol Activities at the Activities tab on the Contract Patrols tab of the **Contract Details** screen. You can do this when setting up the Contract or at a later date.



GPS Handling

You have a number of options for the handling of the recording of GPS coordinates. For some Activities, such as travelling to the start of the Patrol, the recording of GPS coordinates is most likely not required. For Activities, such as Sweeping, recording both sides of the Road are most likely required. For Activities such as Grading, the number of times travelled up and down the same Road is likely required. For Location Activities, such as Culvert inspection and clearance, only the Location, and perhaps the Asset ID, is likely required.

You select appropriate option from the GPS Handling drop-down list. See GPS Handling and Line Recording (on page 164).

Record GPS Lines

When **RAMM** is interpreting received GPS data it calculates the distance that the Patrol is from the Centre Line of a known Road. You have the option to decide whether **RAMM** will keep GPS Location records if the Patrol moves further away from the Centre Line than a predetermined distance. Normally you would not be interested and would set the Record GPS Lines drop-down list to No. An example where you would want to set this option to Yes is for a Litter Contract where the Patrol must go a distance from the Centre Line, such as on to a beach, to clear Litter.

Dispatch Template

If the Activity you add is to enable a Patrol worker to add a Dispatch, such as for a Pothole repair, you associate the Activity with a Dispatch Template. You set up Dispatch Templates at the Dispatch Templates tab. See Dispatch Templates (on page 158).

If the Activity is one such as Sweeping, this does not require a Dispatch. So no Dispatch Template is selected at the Dispatch Template drop-down list.

Colour of Patrolled Roads and Locations

You define a particular colour for the Roads or Locations which are Patrolled during the period when the button for an Activity has been pressed. They will appear in this colour in the **Pocket RAMM Map** to the Patrol operator.

You use this so that the operator can readily see which Patrol Roads have been traversed.

If the Activity is for a Location, you select the colour at the Patrolled Roads colour-picker, which will be used to mark the Location on the **Pocket RAMM Map**.

Pocket Patrol Buttons


Pocket RAMM Patrol buttons are set up at the Pocket Patrol Button section of the Activities tab.

The **Bold Title** becomes the primary tag for the button. So you should make this as short and descriptive as possible. It displays in the upper half of the button.

The **Small Text** is the subsidiary or explanatory text which appears beneath the **Bold Title** or the **Button Icon**. You should use a **Small Text** value only if the **Bold Title** or the **Button Icon** do not make the purpose of the Activity button clear enough.

The **Button Icon** is a graphical representation of the Activity. You can use your own icons for this so long as they are Bitmap files. **Pocket RAMM** resizes the Bitmaps to fit on the buttons. If you use a **Button Icon**, this replaces any **Bold Title** value.



When a **Pocket RAMM** Patrol operator presses , the device screen opens with buttons for each of the Activities to be performed on the Patrol.

Patrol Activity Asset Types

If you select the GPS Handling option No Patrolled Road, Location Visit Only the Patrol Activities Asset Types panel will become available.

You define an Asset Type to associate with a Reminder Activity button so that when the operator presses the Reminder button **Pocket RAMM** will look in the area for Assets of the Asset Types specified and offer the operator a selection of Assets with which to associate the Reminder.

The Reminder number will appear on the **Pocket RAMM Map** in the colour you select at the Patrolled Roads colour-picker.

GPS Handling and Line Recording

You select from the GPS Handling drop-down list the most appropriate option for the recording of GPS information. The options are:

- **Calculate Patrolled Roads**
You use this setting for the standard situation where the Roads travelled during the Patrol are recorded in **RAMM**. You would use this for a Street Lights Patrol where the worker is checking for inoperative Street Lights and the Network Owner wishes to see which Roads the Patrol actually covered.
- **Calculate Patrolled Roads by Side**
You use this setting for the situation where the Network Owner needs to see if the Patrol covered both sides of a Road. An example of this is a Road Sweeping Contract where both sides of the Road require sweeping and the Network Owner wants to see if both sides of the Road were actually swept.
- **Calculate Grading**
You use this setting for Contracts where the Patrol worker is required to Patrol the same Road more than once. An example of this is a Grading Contract where the Patrol worker is contractually obliged to grade the same Road several times and the Network Owner wants to be able to see how many passes a Grader driver actually made.
- **Patrolled Road Work Point**
You use this setting for Contracts where there is a need to analyse the position of regular tasks. An example could be a Litter Removal Contract where the Network Owner needs to be able to view the Roads Travelled and also needs to be able to analyse where the Litter is being picked up so that patterns can be discovered and analysed.
- **No Patrolled Road, Dispatch Only**
You use this setting for Activities such as creating a Dispatch. An example of this is a Patrol worker who has Road Sweeping as the primary Patrol role but has authority to add Pothole Dispatches. Sweeping would be added as an ordinary Activity. Pothole would be added as an Activity with no Patrolled Road information kept but associated with a Job Template for a Pothole Dispatch.
- **No Patrolled Road, No GPS**
You use this setting for Activities where neither the Patrolled Roads nor the GPS information is required to be collected. An example of this is if there were an Activity such as Meal Break defined. The Network Owner would have no interest in where a Patrol worker might go in a meal break. A Contractor would have an interest in when meal breaks were taken and how long they lasted. Activities with this setting do not record times or positions. So the Contractor would have to infer the break period from the times of the end of the previous Activity and the start of the next.
- **No Patrolled Road, Location Visit Only**
You use this setting for creating a Reminder Activity (button). An example of the need for Reminders occurs when the Patrol operator has a set Patrol which involves checking that a particular Drain is clear. If, when the Operator passes the Drain, it is obscured by a vehicle, the operator would press Reminder. When you set up an Activity with this GPS Handling setting you can associate it with an Asset Type. If you do this, then when the operator presses the Reminder button, **Pocket RAMM** will look for Assets in the area and offer the operator a selection of Assets with which to associate the Reminder. **Pocket RAMM** uses sequential numbers to mark the spot for Reminders. So if you visit the same Location more than once, the **Pocket RAMM Map** will display the number of times you have pressed the Reminder button. The number will appear in the colour you select at the Patrolled Roads colour-picker.

- **No Patrolled Road, Asset Only**

You use this setting to mark on the **Map** the Location of an Asset. For instance you could use it to show the Location of each litter bin you emptied during a Patrol.



You can define a Contract Patrol Activity as the Patrol Default only if its GPS Handling has been set to calculate the Patrolled Roads.

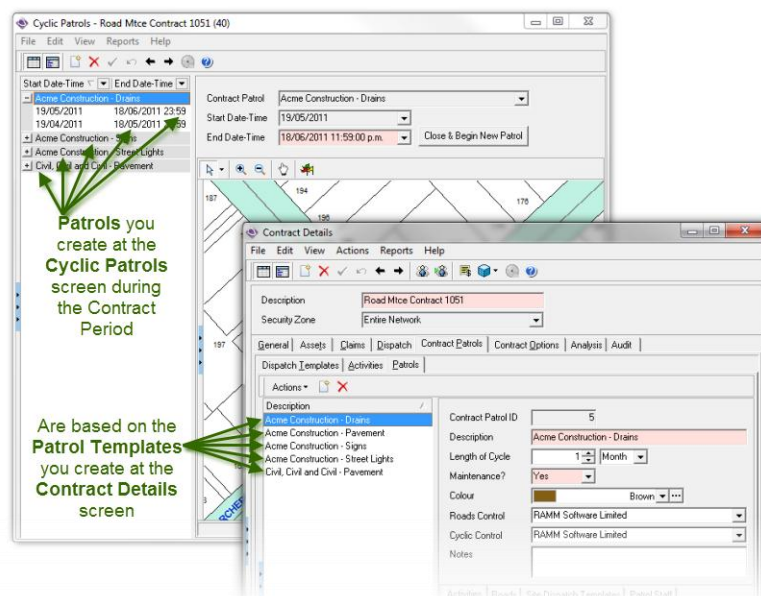
Contract Patrol Templates

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.

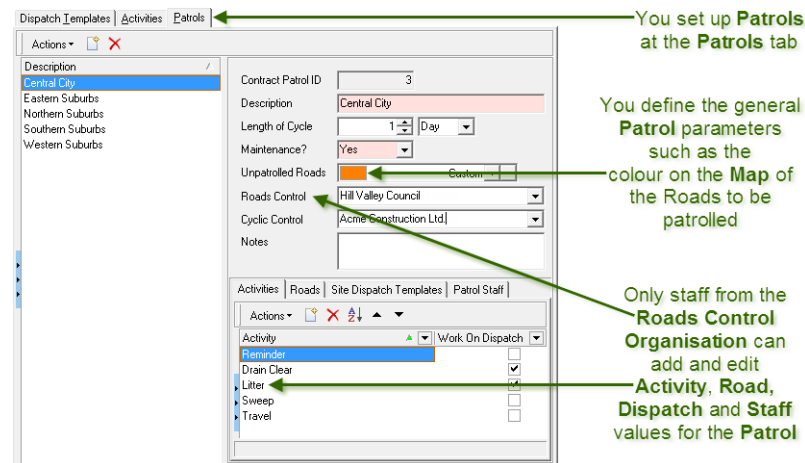
Contract Patrols

You set up Contract Patrol Templates in **RAMM Contractor** at the Patrols tab on the Contract Patrols tab of the **Contract Details** screen.

You use these as templates for Patrol records in **RAMM Contractor**.



They determine which buttons will be available to the operator, the Road set to be Patrolled, any Site Dispatches for the operator and the personnel able to perform the Patrol.



Contract Patrol ID, Description, Length of Cycle and Maintenance

The Contract Patrol ID is the **RAMM Contractor**-generated identification number for the Contract Patrol. It is unable to be entered or edited.

The Description is your user-defined identification of the Contract Patrol. It is for your information only and is editable.

The Length of Cycle defines how often the Contract Patrol must be undertaken. Possible values range from 1 Day to multiple years between Patrols. You use this value at the **Cyclic Patrols** screen in **RAMM Contractor**. When defining Cyclic Patrols in advance, the Start Date-Time will default based on to the Length of Cycle which you have set.

You specify whether or not the Contract Patrol is a Maintenance Patrol. This is for your information only and serves no functional purpose in **RAMM Contractor**. Maintenance Patrols are considered to be Patrols where the operator carries out Dispatches.

Unpatrolled Roads

Patrol operators need to be able to see clearly on the **Map** in **Pocket RAMM** those Roads in the Patrol set which they have yet to Patrol.

You select a colour at the Unpatrolled Roads colour-picker to differentiate Roads which need to be Patrolled from those that do not.

Roads Control

You select from the Roads Control drop-down list the Organisation which controls the Contract Patrols. This would normally be the Network Owner or its Consultant.

Only staff from the Organisation selected who have the appropriate Staff Permissions can add or edit Activities, Roads, Site Dispatch Templates and Patrol Staff values in the lower (unnamed) Patrols Details panel.

The fields on these tabs do not become available until a value has been selected at the Roads Control drop-down list and the user is from the selected Organisation and has the appropriate Staff Permissions.

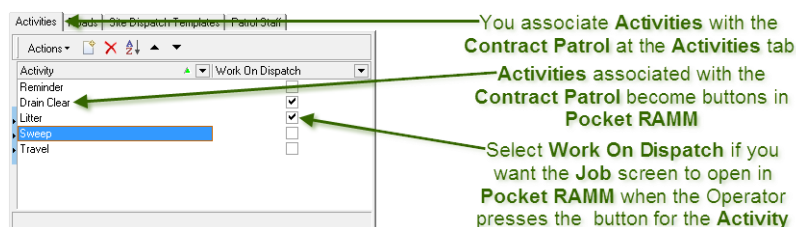
Cyclic Control

You select from the Cyclic Control drop-down list the Organisation which may create the Cyclic Patrols using this Patrols template. This would normally be the Contractor or its subcontractor.

Patrol Activities

Patrol operators have a fixed set of duties to perform while on Patrol. In **RAMM Contractor** you define these duties or tasks as Contract Patrol Activities. See Activities (on page 161).

You associate these Contract Patrol Activities with Contract Patrols at the Activities tab in the (unnamed) Patrols Details panel on the Patrols tab on the Contract Patrols tab of the **Contract Details** screen.



Task Buttons

The Patrol operator will be expected to perform certain tasks while on Patrol. The Patrol operator may also need to add Jobs while on Patrol. You associate, with the Contract Patrol Template, those Contract Patrol Activities which represent these tasks and Jobs. These then become the buttons which are available in **Pocket RAMM** for that particular Patrol.

In the example below, the six Activities associated with the Contract Patrol Template have become **Pocket RAMM** buttons.

Work on Dispatch

Patrol operators may be required to create Dispatches and add details to them. They may also be required to create Dispatches for others to perform. For a Sweeping Patrol an example of the former could be Clear Detritus, and an example of the latter could be Pothole.

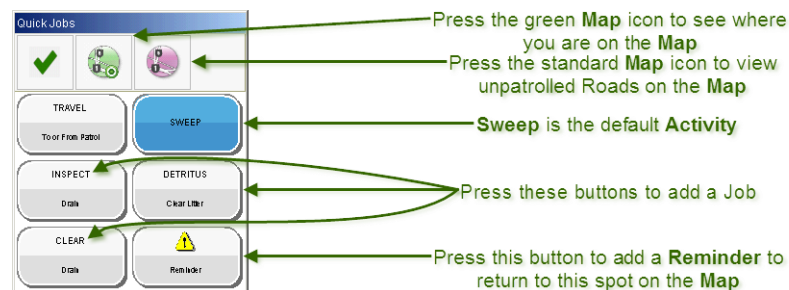
When an Activity with an associated Dispatch Template is added to a Contract Patrol, if the task is one which the operator might be intended to perform, you would select the Work on Dispatch option so that when the Dispatch is added by the operator, the **Pocket RAMM Job** screen will open so that the operator can work on the Job.

Where the task is not to be performed by the operator, you clear the Work on Dispatch option. The Job is then created and saved automatically without the **Job** screen opening for the operator to work on its details.

Default Activity

You have the option to set one of the Activities as the default. Then when the operator logs in to **Pocket RAMM** and taps the Patrol to start it, the default Activity will be highlighted and running. In the example below, the Sweep Patrol has started.

So you should designate an Activity as the default only if the operator is going to perform the task as soon as they log into the Patrol.



NOTE

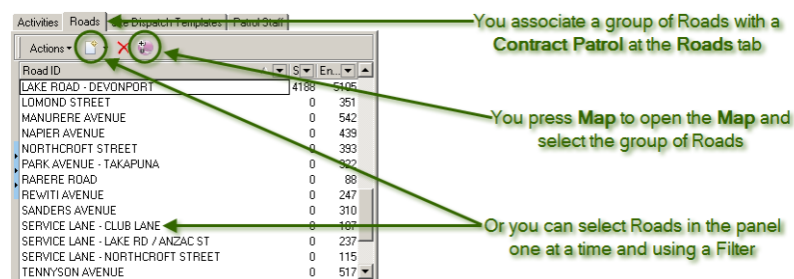
You can define a Contract Patrol Activity as the Patrol Default only if its GPS Handling has been set to calculate the Patrolled Roads.


Patrol Roads

If the maintenance Contract lists a set of Roads to be Patrolled on a regular basis, you restrict the **RAMM Contractor** Patrol template to that particular set of Roads. You define the Road set and then associate it with the Patrol template. Then, when the operator is using **Pocket RAMM** for the Patrol, the Roads yet to be Patrolled are highlighted on the **Map** in **Pocket RAMM**. You do this at the Roads tab on the Patrols tab on the Contract Patrols tab of the **Contract Details** screen.

Use the Map or Select Roads in the Panel

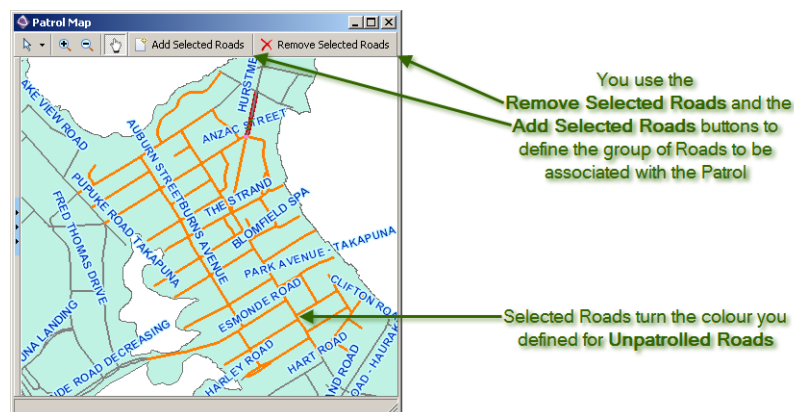
You can use the standard method of selecting Roads from the Road ID drop-down list or using a Filter to define the group of Roads to be associated with a Patrol.



You can press  to open the **Map** and select the Roads. There are two buttons you use to select the group of Roads for the Patrol:

- Add Selected Roads
- Remove Selected Roads.

The Roads you select are readily identified as they change colour to the one you chose for unpatrolled Roads. In the graphic below this is tan.



Patrol Roads and Site Dispatches

Normally, if you were associating Site Dispatch Templates with a Contract Patrol Template, you would include, in the Patrol Road list, the Road on which the Site Dispatch Template is Located. This is not mandatory.



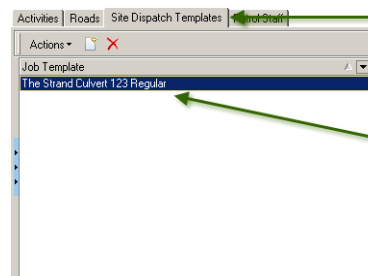
If a Site Dispatch Template has been associated with a Contract Dispatch Template and you remove the Road on which it is Located from the Patrol Road list, the Site Dispatch Template will be disassociated from the Patrol.

Site Dispatch Templates for Patrols

You associate Site Dispatch Templates with a Contract Patrol Template for tasks which the Patrol operator performs at the same Location or on the same Asset on a regular basis. Then, when the operator starts the Patrol, there will be Dispatches to be performed already on the **Pocket RAMM** map.

An example is Culvert inspections which are performed each week or each month on the same Assets.

You associate the Site Dispatch Templates with the Patrol at the Site Dispatch Templates tab on the Patrols tab on the Contract Patrols tab of the **Contract Details** screen.

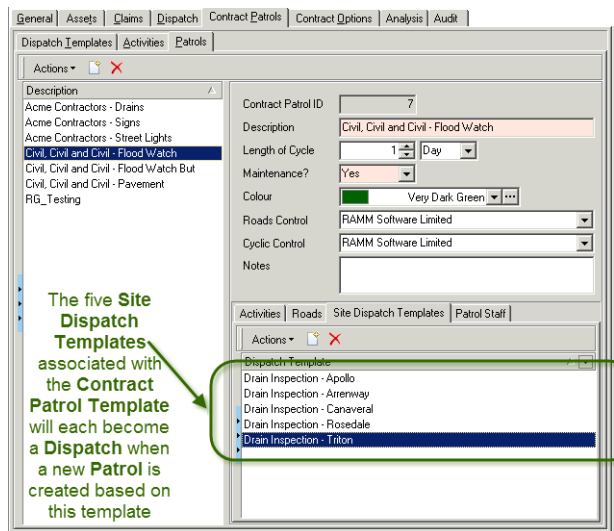


You associate Site Dispatch Templates with a Patrol at the Site Dispatch Template tab

Best practice is to ensure that the Roads on which the Site Dispatch Templates are Located have been selected in the Roads list for the Patrol

Site Dispatch Templates Become Dispatches on the Map

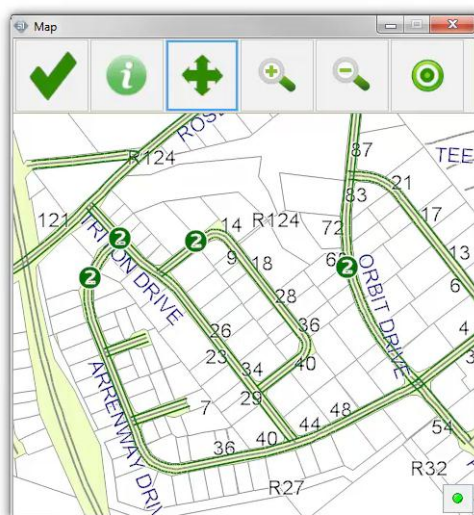
Site Dispatch Templates you associate with a Contract Patrol Template become Dispatches when a Patrol is created based on the Contract Patrol Template.



The Patrol Operator Sees the Default Dispatches

Patrol Operators may add Dispatches when they perform a Patrol. You associate Site Dispatch Templates with a Contract Patrol Template if you want particular Dispatches to be already waiting for a Patrol Operator when they open the Patrol.

The Patrol operator then sees plainly that there are a number of tasks they are expected to perform. The graphic below shows four of the Dispatches in the above graphic associated with the Civil, Civil and Civil - Flood Watch Contract Patrol Template. The Rosedale Road Dispatch is off the map screen.



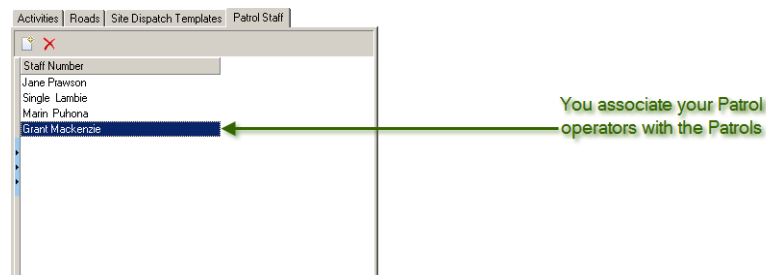


If a Site Dispatch Template has been associated with a Contract Dispatch Template and you remove the Road on which it is Located from the Patrol Road list, the Site Dispatch Template will be disassociated from the Patrol.

Patrol Staff

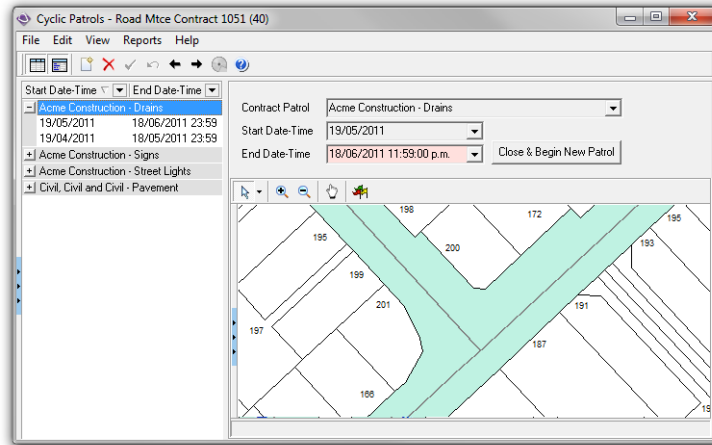
Once you have created your Patrol templates, you specify which Patrol operators are to perform the actual Patrols. You do this by associating Patrol Staff with Patrol templates. Then, when the operator logs in to **Pocket RAMM**, they will be offered only Patrols which you have determined they may perform.

You do this at the Patrol Staff tab on the Patrols tab on the Contract Patrols tab of the **Contract Details** screen.



Create Patrols

You then create the actual Patrol records in **RAMM Contractor** at the **Cyclic Patrols** screen.



Patrols in Pocket RAMM

Then when the Patrol operator presses the Patrol button in **Pocket RAMM** only those Patrols which they have been associated with will appear at the **Patrol List** screen for them to perform.



← The Patrols for the operator are listed in date order

Contract Options

When you set up a Contract in **RAMM Contractor** you want it to match your actual contract provisions and business practices. You use Contract Options to define Audit, Auto Claiming, Dispatch, Permission Control, Programming and Response Time parameters.

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Introduction to Contract Options

You use Contract Options to refine the Contract in **RAMM Contractor** so that it most closely matches the contract with the Network Owner as well as your business practices.

Dispatch

You have five Dispatch options. They relate to the nature of the Contract you have with the Network Owner and depend on your use of **Pocket RAMM**.

See Setting Dispatch Options (on page 179).

Programming

If you are required by your Contract, to present a Programme of works to the Network Owner, you can do this only if you enable Programming. If you enable Programming, you then have the option to further categorise or prioritise Dispatches within or across Programmes. You can achieve this using Programme Categories.

See Enabling Programming (on page 184).

Response Time

Both the Contractor and the Network Owner have an interest in the time it takes from when a Dispatch is added to **RAMM Contractor** to the time when it is assigned and completed. You can set up a Contract so that Response Times of individual Dispatches can be recorded and average Response Times calculated.

See Setting Response Time Options (on page 190).

Auto Claims

When setting up a Contract you can enable Auto Claiming in **RAMM Contractor** and also in **Pocket RAMM**. Auto Claiming includes Auto Estimation. Auto Claiming can save an operator work and enhance accuracy in estimation and claiming.

See Enabling Auto Claiming and Estimating (on page 194).

Permission Control

There are four critical fields or panels for which you define who has control of the Staff Permissions.

See Setting Permission Control (on page 198).

Texting

At the Contracts Options Texting tab, there is an Email Address field. This currently is for information only and serves no functional purpose in **RAMM Contractor**.

Auditing

RAMM Contractor can keep a variety of audit records. These are for changes to Dispatches, Claim and Estimate lines, Claim Headers and to the Contract itself. You select the actual audit records you want to keep for a Contract. You should make this selection when setting up the Contract as **RAMM Contractor** can not create audit records retroactively.

See Setting Audit Record Options (on page 202).

Dispatch

You have six Dispatch options. Whether or not you select these options will depend on the nature of your organisation and the Contract you have with the Network Owner. In particular, it will depend on your use of **Pocket RAMM**.

General | Assets | Claims | Dispatch | Contract Patrols | Contract Options | Analysis | Audit

Dispatch | Programming | Response Time | Auto Claims | Permission Control | Texting | Auditing

- ☒ Set dispatch status to 'Dispatched' when a dispatch is assigned to someone
- ☒ Allow changing the Complete date of a dispatch
- ☒ Enable Dayworks
- ☒ Enable Maintenance Costs on Dispatches
- ☒ Enable View Status
- ☒ Show asset screen upon completing a dispatch in RAMM Contractor

This setting cannot be changed once the Contract has been 'Opened' unless you are the Network Owner.

Dispatched Status

You have the option to set Dispatch status to Dispatched once it is assigned. Normally you would select this option.

The only circumstances under which you would leave this option cleared would be if you ran a manual, paper system. Then you would want the Dispatch status to be Dispatched once it has been printed.

Date when Dispatch is Set to Complete

You have the option to allow the date on which a Dispatch was set to Completed to be altered.

The only circumstances under which you would enable this option would be if you ran a manual, paper system. Then you would want the flexibility to **Complete** Dispatches within **RAMM Contractor** on a date other than that on which it was actually Completed.

See Complete the Dispatch (on page 343).

Dayworks

You have the option to enable Dayworks. You would do this if the Contract with the Network Owner allows for Dayworks. See the Dayworks chapter of the *RAMM Contractor Best Practice* guide.


Maintenance Costs on Dispatches

Some operators assign Maintenance Costs values to the Dispatch as a whole. They do this by associating them with the Dispatch Fault Category. Others prefer the more granular approach of associating them with each individual Claim line. They do this by associating them with individual CSIs (Contract Schedule Items). It is also possible to use a combination of the two.

See Maintenance Costs and Dispatches (on page 81).

You select the **Enable Maintenance Costs on Dispatches** option if it suits your business practices to associate Maintenance Costs with the Dispatch Fault Category, and therefore with the Dispatch as a whole.

Enable View Status

You have the option to enable View Status. You select this option to add the **Change View Status**  button to the toolbar on the **Dispatch** maintenance screen and a **View Status** column to the (unnamed) Dispatch List panel on the same screen.

If a Dispatch is assigned to a user, and they already have a number of Dispatches assigned to them, it may not be immediately obvious when they look at the list of their assigned Dispatches that a new Dispatch has appeared. In this case you **Enable View Status** and set the **View Status** column to be visible in the (unnamed) Dispatch List panel of the **Dispatch** maintenance screen.

You can not select this option unless you have selected the **Assigned To** option at the Auditing tab.

See Setting Audit Record Options (on page 202).

Show Asset Screen on Dispatch Completion

You have the option to have the Asset screen open automatically when a Dispatch has been completed in **RAMM Contractor**. Normally you would leave this option cleared.

You would select this option only if you have a Contract for the maintenance of Streetlights, Signs or Traffic Signals. This option has no effect on other Asset Types. You would also select this option only if you do not use **Pocket RAMM** but complete your Dispatches in **RAMM Contractor**.

Once the Contract has been opened, only the Network Owner can change this setting.

Setting Dispatch Options

Introduction

When you set up a Contract in **RAMM Contractor** the Dispatch options you choose will depend on the nature of the Contract you have with the Network Owner and also on your use of **Pocket RAMM**. You set Dispatch options for Progress Notes, Dispatch Status, Dayworks, Maintenance Costs association and Dispatch Completion to match your contract provisions and your business processes.

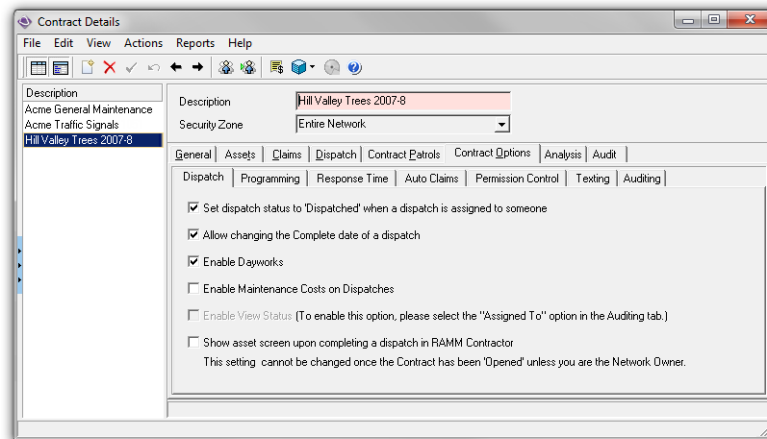
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- selected the **Assigned To** option at the **Auditing** tab of the **Contract Options** tab of the **Contract Details** screen if you intend to enable **View Status**. See Setting Audit Record Options (on page 202).
- a copy of the contract to which to refer if necessary.

Menu Path

Follow the menu path (add initial Contract details) > (press Contract Options) > (press Dispatch) to open the **Contract Details** screen at the Dispatch tab.

► To Set Dispatch Options



To do this you follow these steps:

1 When do you want the Dispatch status set to Dispatched?

If	then
you do not use Pocket RAMM and want the status changed to Dispatched only when the Dispatch is printed	clear the Set dispatch status to 'Dispatched' when a dispatch is assigned to someone option.
you use Pocket RAMM and want the status changed to Dispatched only when the Dispatch is assigned	select the Set dispatch status to 'Dispatched' when a dispatch is assigned to someone option.

2 When do you want the Dispatch status set to Completed?

If	then
you do not use Pocket RAMM and your administrative staff set Dispatches to Completed after the work has actually been completed	select the Allow changing the Complete date of a dispatch option.
you use Pocket RAMM and you want the Dispatch status set to Completed once the operator sets it as Completed	clear the Allow changing the Complete date of a dispatch option.

3 Does your Contract allow for Dayworks?

If	then
your contract with the Network Owner allows for Dayworks	select the Enable Dayworks option.
your contract with the Network Owner does not allow for Dayworks	clear the Enable Dayworks option.

- 4 Do you associate Maintenance Costs values with the Dispatch Fault Category, Claim lines or both?

If	then
you associate Maintenance Costs values with the Dispatch Fault Category	select the Enable Maintenance Costs on Dispatches option.
you associate Maintenance Costs values with the Dispatch Claim lines only	clear the Enable Maintenance Costs on Dispatches option.
you associate Maintenance Costs values with both the Dispatch Fault Category and the Claim lines	select the Enable Maintenance Costs on Dispatches option.

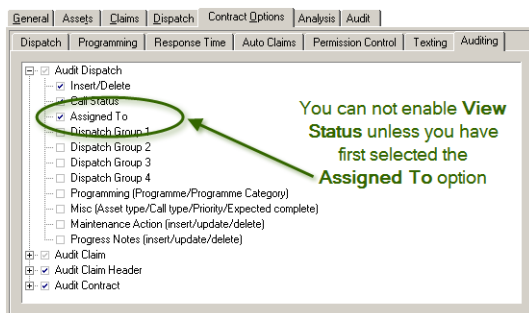
- 5 Do you want the View Status column to be visible in the (unnamed) Dispatch List panel of the **Dispatch** maintenance screen. This will make it more obvious to a **RAMM Contractor** user, when they look at the list of their assigned Dispatches, that a new Dispatch has appeared.

Yes	go to step 6.
No	go to step 12.

- 6 Is the Enable View Status option available?

Yes	go to step 11.
No	go to step 7.

- 7 Press the Auditing tab on the Contract Options tab.
 8 Press **⌘** to open the Audit Dispatch tree.
 9 Select the Assigned To option.
 The Enable View Status option will become available on the Dispatch tab.



- 10 Press the Dispatch tab on the Contract Options tab.
- 11 Select Enable View Status.
- 12 Do you use **Pocket RAMM** for the Completion of Signs, Street Lights and Traffic Signals Dispatches?

If	then
you Complete your Signs, Street Lights and Traffic Signals Dispatches in Pocket RAMM	clear the Show Asset screen upon completing a dispatch in RAMM Contractor option.
you Complete your Signs, Street Lights and Traffic Signals Dispatches in RAMM Contractor	select the Show Asset screen upon completing a dispatch in RAMM Contractor option.
this is not a Contract for the maintenance of Street Lights, Signs or Traffic Signals	clear the Show Asset screen upon completing a dispatch in RAMM Contractor option.

- 13 Press Your changes will be saved.
- 14 Go to Enabling Programming (on page 184).

Programming

If you are required by your contract, to present a Programme of works to the Network Owner, you can do this only if you enable Programming. If you have a contract which is for regular standard operations such as a Traffic Light Maintenance Contract, you would not need to enable Programming as your duties are the same every month.

Optional, Mandatory or Not in Use

You set Programming to be **Optional** or **Required** when a user is adding a Dispatch. See the *RAMM Contractor Best Practice* guide to understand the pivotal role Programming plays in Best Practice.

To turn off Programming you set it to **Not in use**.

You add Programmes at the **Programmes** maintenance screen.

See Adding Programmes (on page 387).

Programme Categories

If you enable Programming, you then have the option to further categorise or prioritise Dispatches within or across Programmes. You can achieve this using Programme Categories. These are user-defined.

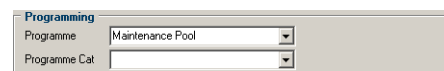
An example of a Contractor using Programme Categories could be for defining their own areas of operation. The Network Owner may have defined the Security Zone for the Contract but the Contractor requires smaller areas for grouping Dispatches. In this case the Contractor could define as many Programme Categories as required to group Dispatches into discrete areas of operation.

Many users do not set Programme Categories unless it is a contract requirement.

Dispatch Screen

If you have enabled and set up Programming and Programme Categories, then when you add or edit a Dispatch, you have the option to assign it to a particular Programme and a predefined Contract Programme Category. You do this at the Programming section on the **Dispatch** screen General tab.

Dispatch Screen Programming Section



The screenshot shows a software interface titled "Programming". It contains two dropdown menus. The first menu, labeled "Programme", has "Maintenance Pool" selected. The second menu, labeled "Programme Cat", is currently empty.

Enabling Programming

Introduction

If you are required by your contract, to present a Programme of works to the Network Owner, you need to enable Programming. If you have a contract which is for regular standard operations such as a Traffic Light Maintenance Contract, you would not need to enable Programming as your duties are the same every month. So you would set Programming to **Not in use**.

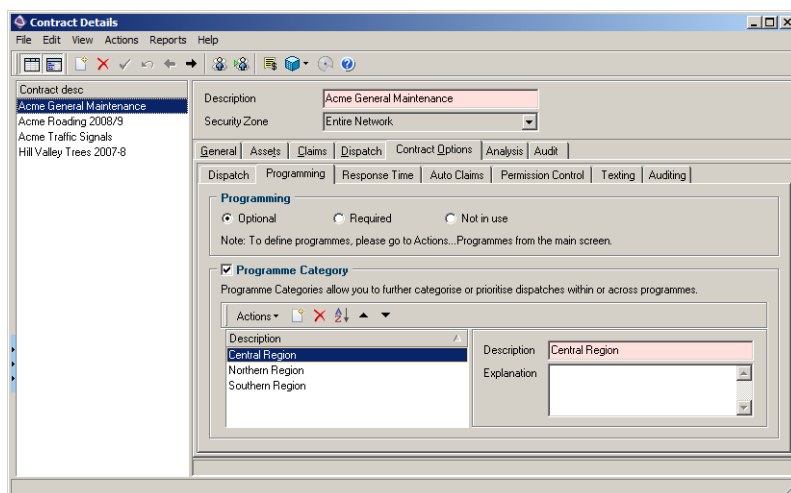
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a copy of the contract to which to refer if necessary.


Menu Path





Follow the menu path (add initial Contract details) > (press Contract Options) > (press Programming) to open the **Contract Details** screen at the Programming tab.

► To Enable Programming



To do this you follow these steps:

- 1 If your contract does not require you to present a Programme of works to the Network Owner at regular intervals, go to step 2. Otherwise go to step 5.
- 2 In the **Programming** section, select the **Not in use** option.
- 3 Press  to save your changes.

- 4 Go to step 14.
- 5 In the **Programming** section, select **Optional** or **Required**. See **Programming** (on page 182).
- 6 Press  to save your changes.
- 7 If your contract requires you to categorise or prioritise Dispatches using Programme Categories, or if you have your own reasons for adding Programme Categories, go to step 8. Otherwise go to step 14.
- 8 Select the **Programme Category** option and press  to save your changes. This will make the lower **Programme Category** maintenance section available.
- 9 Press CTRL+N or  to add a new Programme Category record.
- 10 Type in the **Description** field the descriptive value which you want to appear in the **Programme Category** drop-down list in **RAMM Contractor** and in **Pocket RAMM**. Make this as short as possible.
- 11 Type useful explanatory notes for this Programme Category in the **Explanation** field. 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.
- 12 Press  to save the record.
- 13 If you want to add another Programme Category, go to step 9. Otherwise, go to step 14.
- 14 Go to **Setting Response Time Options** (on page 190).

Response Time

Both the Contractor and the Network Owner have an interest in the time it takes from when a Dispatch is added to **RAMM Contractor** to the time when it is assigned and completed. You can set up a Contract so that Response Times of individual Dispatches can be recorded and average Response Times calculated.

Contract Provisions

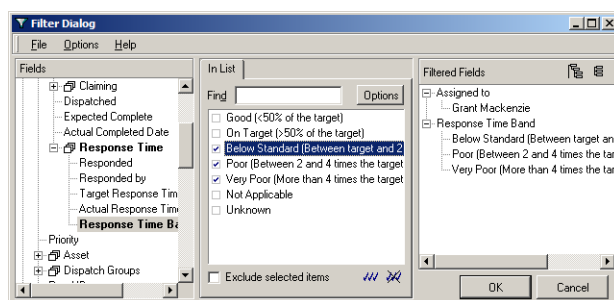
The Network Owner may have included Key Performance Indicators (KPIs) in the provisions of the contract. If so, you can set up Response Time parameters so that your performance can be measured against preset standards.

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.

Response Time	
KPI Target	14 days
KPI Actual	4 days*
Under by	10 days - Good (<50% of the target)

Reports

The Dispatch Analysis report and the Dispatch Grid report can both be used as analysis tools for Response Times. See Dispatch Analysis Report (on page 357). See Dispatch Report (on page 359). You can also use the Filter to analyse Response Times. The Response Time Band information is particularly useful. Follow the menu path Dispatch Entry > Status > Response Time > Response Time Band.



Calculations

If you are going to measure Response Times you first need to set the datum points from which your Response Times will be calculated.

Start Date

The start date for the Response Times will depend on whether or not you use a Call Centre as a source of Dispatches. If you use a Call Centre you will want to measure Response Times using:

- the date on which the call centre received the call, or if that does not exist, the date on which the Dispatch was entered.

If you do not use a Call Centre you will use as a start date:

- the date on which the Dispatch was entered.

End Date

You can measure the end of the Response Time as either:

- the date on which the Dispatch was completed or
- the date on which there was a response to the Dispatch.

If you select the **Completed date** option from the **End using** drop-down list then, when the Dispatch is completed, the date and time will default into the **Completed** field at the **Audit** tab of the **Dispatch** maintenance screen. This date will be unable to be entered or edited.

If you select the **Responded date** option at the **End using** drop-down list then, you have more flexibility. Firstly, the Staff Permissions for the end date value may be set to enable editing or not. Then you have three choices for your preferred end date option at the **Settings** tab.

Recalculate Targets

There is a **Recalculate targets** button which you can press to have the Response Time parameters applied to existing Dispatches.

Settings

Completed Date and Time

If you set the value in the **End using** drop-down list at the **Calculations** tab to **Completed date**, you do not need to take any actions at the **Settings** tab.

You can select any of the options that you wish and the appropriate values will default into the **Dispatched**, **Time on Site** and **Completed** fields at the **Audit** tab on the **Dispatch** maintenance screen.

These values will be available for reference and reporting but will not be used in Response Time calculations.

The screenshot shows a software interface with three tabs: 'Calculations', 'Settings', and 'Targets'. The 'Settings' tab is active. It contains a checkbox labeled 'Calculate Response times on dispatches' which is checked. Below this are two dropdown menus: 'Start using' and 'End using'. The 'Start using' dropdown is set to 'Entered date from the dispatch' and the 'End using' dropdown is set to 'Completed date'. At the bottom of the settings area is a button labeled 'Re-calculate targets'.

Responded Date and Time

If you set the value in the **End using** drop-down list at the **Calculations** tab to **Responded date**, then you need to set which of the actions will be used for Response Time calculations.

The contract between the Network Owner and the Contractor should specify which parameter is to be used.

The options are to set the **Responded** field to the value when:

- Dispatched
- On Site
- Completed.

Select Multiple Options

You can select more than one setting. In this case the earliest of the times will be the one used for Response Time calculations.

The other values will be available for reference and reporting but will not be used in Response Time calculations.

Set Weekend Response Times

You have the option to have weekends excluded or included in Response times. If you select the Include Weekends option at the Set weekend response times drop-down list, then weekend hours will be included in Response time calculations. If you select Exclude Weekends, they will not. You also have the option to choose Exclude Except Urgent in which case the weekend hours will be included only for Dispatches with Priority codes defined as Urgent. See Adding Priority Codes (on page 149).

The weekend is defined as the forty eight hours from midnight Friday to midnight Sunday.

Date and Time Fields on Dispatch Screen

Targets

The targets for Response Times will usually vary depending on the nature of the maintenance Contract and Asset which is the subject of the Dispatch.

If the Network Owner is concerned mostly with the Response Time between when a Dispatch was created and when it was Dispatched, then the targets are likely to be simple. If the Network Owner prefers to calculate the Response Time from the time when the Contractor arrived on site or when the Dispatch was completed, a more complex mix of targets will be required. For instance, it would be unrealistic to expect the same Response Time for Dispatches in the country as those in the city. So you may need to use Carriageway information as a target parameter.

Carriageway Criteria

The Network Owner may expect you to deal with Faults in high traffic density areas more promptly than Faults in low traffic density areas. In this and other situations, the targets need to be set dependent on Carriageway criteria. You use:

- Hierarchy
- Pavement Use
- Pavement Type
- Carriageway Area
- Road Group
- Lighting Category
- Maintenance Group
- Carriageway Groups 1-5 (these are user-defined) .

If you select a Carriageway Criteria other than Not Applicable, the Carriageway Value drop-down list becomes available.

Target Combinations

You set Response Times, in hours, by any combination of:

- Asset Type
- Fault
- Priority or
- Call Type
- Carriageway Value.

All Other Jobs

When you save your changes to enable calculating Response Times, **RAMM Contractor** automatically creates a catch-all Target with a Response Time of fourteen days.

Setting Response Time Options

Introduction

The Contractor and the Network Owner both have an interest in the time it takes from when a Dispatch is added to **RAMM Contractor** or to **Pocket RAMM** to when it is Assigned to and Completed. If the contract with the Network Owner requires you to perform to certain Response Times, you can set these up in the Contract.

The Contractor and the Network Owner can then both monitor progress. You enable Response Time calculations on Dispatches, set the start and end parameters and then create the Targets. The Response Times of individual Dispatches can be recorded and average Response Times calculated.

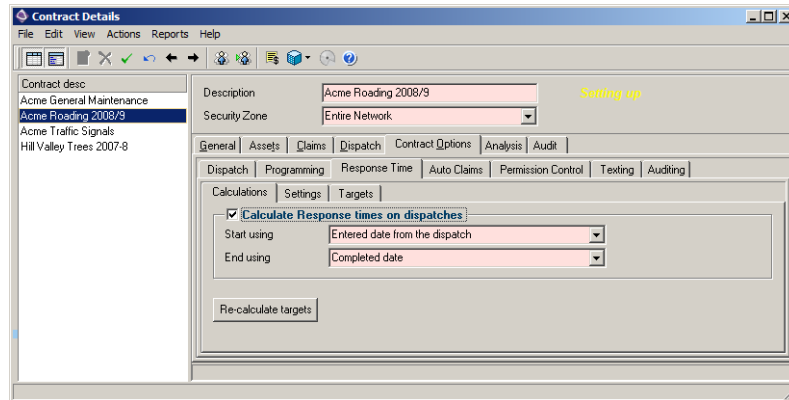
Before you do this you need to have:

- added the initial Contract details. You do this at the General tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- selected Asset Types for the Contract. You do this at the **Add Asset Types** screen. See Selecting Contract Asset Types (on page 53).
- defined your **Call Types**. You do this at the **Call Types** maintenance screen. See Adding Dispatch Call Types (on page 102).
- defined **Fault Categories** for the Asset Types. You do this at the **Fault Categories** maintenance screen. See Defining Dispatch Fault Categories (on page 109).
- defined Priority codes. You do this at the Priority tab on the **Contract Details** screen. See Adding Priority Codes (on page 149).
- a copy of the Contract to which to refer if necessary.

Menu Path

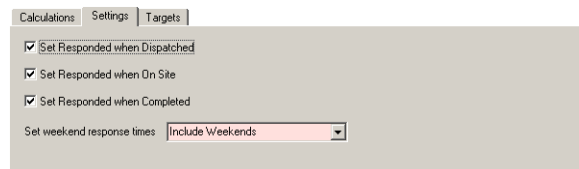
Follow the menu path (add initial Contract details) > (press Contract Options) > (press Response Time) > (press Calculations) to open the **Contract Details** screen at the Calculations tab.

► To Set Response Time Options




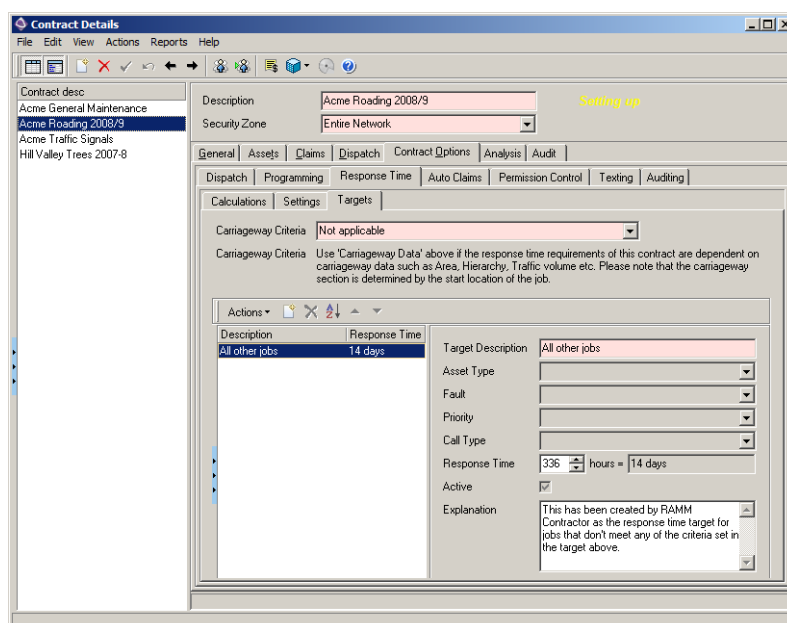
To do this you follow these steps:

- 1 Select the **Calculate Response times on dispatches** check box.
Response Times will be enabled. The Start using and the End using drop-down lists will become available.
- 2 If you use a Call Centre for Dispatch creation, select **Call Centre Entered date** then the **dispatch entered date** from the Start using drop-down list. Otherwise select **Entered date from the dispatch**.
- 3 If your contract requires you to use the date and time at which a Dispatch was Completed for Response Times, select the **Completed date** from the End using drop-down list. Otherwise, select **Responded date**.
- 4 Press .
Your changes will be saved. This action creates a catch-all Target. You can see an example of this catch-all Target in the graphic beneath step 11 below.
- 5 Press the **Settings** tab.





- 6 You have three options. If you select more than one, the earliest of the times will be used for **Response Time** calculations. The other values will be available for reference and reporting but will not be used in **Response Time** calculations. Select the **Set Responded when Dispatched** check box if you want the time and date to default into the Dispatched field on the Audit tab of the **Dispatch** maintenance screen when the Job is dispatched.
- 7 Select the **Set Responded when On Site** check box if you want the time and date to default into the Time on Site field on the Audit tab of the **Dispatch** maintenance screen when the person to whom the Job has been Assigned to is On Site.


- 8 Select the **Set Responded when Completed** check box if you want the time and date to default into the **Completed** field on the **Audit** tab of the **Dispatch** maintenance screen when the Job is set to **Complete**.
- 9 Select, from the **Set weekend response times** drop-down list, whether weekends will be included in **Targets**. See **Settings** (on page 187).
- 10 Press .
Your changes will be saved.
- 11 Press the **Targets** tab to open the panel.



- 12 Are the **Response Time** requirements of the contract dependent on **Carriageway** classification criteria?

Yes	then go to step 13.
No	then go to step 15.

- 13 Select, from the **Carriageway Criteria** drop-down list, the value which matches the contract requirements.
- 14 Press .
Your changes will be saved. The **Carriageway Value** field will appear.
- 15 Press **CTRL+N** or  to add a new **Target** record.
- 16 Type in the **Target Description** field the descriptive value for this **Target**. This description does not appear on any screen.
- 17 Select from the **Asset Type**, **Fault**, **Priority**, **Call Type** and **Carriageway Value** drop-down lists, the combination of parameters for this **Target** as defined in the contract.

- 18 Type in the **Response Time** field, the maximum number of **Response Time** hours as specified in the contract.
- 19 Type useful explanatory notes for this Target in the **Explanation** field.
- 20 Press .
Your changes will be saved.
- 21 Do you want to add another Target?

Yes	then go to step 15.
No	then go to step 22.

- 22 Close the screen in the normal manner.

Auto Claims

When setting up a Contract you can enable Auto Claiming in **RAMM Contractor** and also in **Pocket RAMM**. Auto Claiming includes Auto Estimation. Auto Claiming can save an operator work and enhance accuracy in estimation and claiming.

RAMM Contractor and Pocket RAMM

When enabling Auto Claims, you can enable it in **Pocket RAMM**, **RAMM Contractor** or both. If you are going to enable Auto Claims you would normally enable it in both. However, if the operators in the office using **RAMM Contractor** want flexibility in Estimates and Claims, you could enable only **Pocket RAMM**.

Automatic Estimation

Best practice for Programme Dispatches is that they are created with Estimate lines rather than Claim lines. For Automatic Estimation you enable Auto Claiming and then before completing a Dispatch, you follow the menu path **Actions > Automatic Estimation** at the **Dispatch** maintenance screen.

Schedule Items

The Contract Manager sets up Automatic Claims to define whether a Schedule Item should be added or offered to the user when a Dispatch is completed. This can be based on Priority, Fault and the Asset Type alone, or any combination of the three.

Once this mechanism is set up it produces a much smaller selection of Schedule Items for users completing Jobs in the field. This will be more manageable.

Auto Claims and Signs, Street Lights and Traffic Signals

Best practice for Programme Dispatches is not to use Auto Claims except for Contracts for Signs, Street Lights and Traffic Signals. For these Contracts, approval of individual Estimate lines prior to claiming is not standard practice.



If the Contract is already Open when you are setting up Automatic Claiming you should not enable the Contract Auto Claims Options until you have completed set up. Otherwise your changes will be live as soon as you press the Save button.

Enabling Auto Claiming and Estimating

Introduction

You enable Auto Claiming in **Pocket RAMM**, **RAMM Contractor** or both to have Schedule Items added or offered to the user when a Dispatch is completed.

When setting up a Contract you can enable Auto Claiming in **RAMM Contractor** and also in **Pocket RAMM**. Auto Claiming includes Auto Estimation. Auto Claiming can save an operator work and enhance accuracy in estimation and claiming.

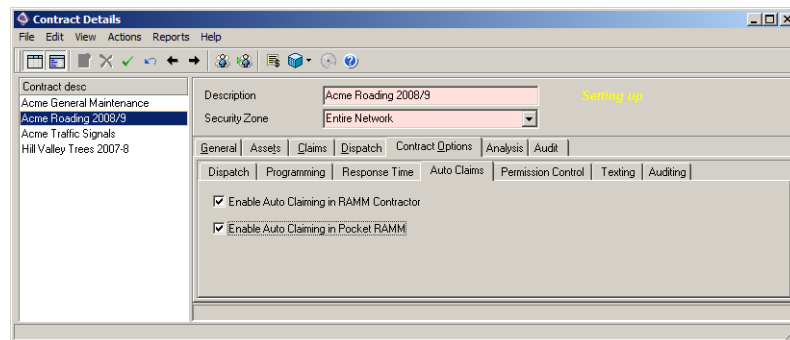
Before you do this you need to have:

- added the initial Contract details. You do this at the General tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).


Menu Path

Follow the menu path (add initial Contract details) > (press Contract Options) > (press Auto Claims) to open the **Contract Details** screen at the Auto Claims tab.

► To Enable Auto Claiming and Estimating



To do this you follow these steps:

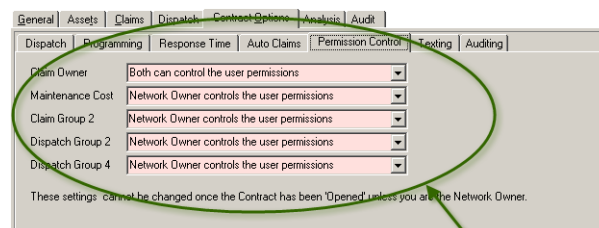
- 1 Select the Enable Auto Claiming in RAMM Contractor option unless your office staff who use **RAMM Contractor** do not require it.
- 2 Select the Enable Auto Claiming in Pocket RAMM option.
- 3 Press  to save your changes.
- 4 Go to Setting Permission Control (on page 198).

Permission Control

The Claim Owner, Maintenance Cost, Claim Group 2 and Dispatch Groups 2 and 4 values apply to all Contracts of the relevant Asset Type. You need to define who controls Staff Permissions for these five critical fields or panels. Once set, these controls can be changed only by the Network Owner.

The three Permission options are:

- Network Owner controls the user permissions
- Contractor controls the user permissions
- Both can control the user permissions.



The characteristic which separates these groupings and values is that they apply across all Contracts for the appropriate Asset Type, unlike the groupings and values at the Analysis tab which apply only to the Contract being defined.



Please note that you are not defining who has the right to change values in these fields. You are defining who controls the Staff Permissions. These are found in the Detail tab of the **Staff Permissions** screen.

Claim Owner

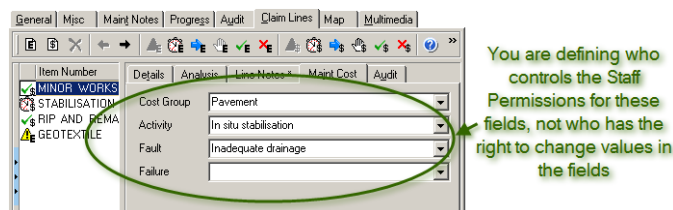
When you add an Estimate or Claim line, the Owner field in **Pocket RAMM** and the Claim Owner field on the Analysis tab may have a value to show who owns the Asset which has given rise to the Job. This is usually a default value.



The Contract with the Network Owner may specify which party or parties to the Contract are to have the right to grant a user permission to change this value. If so, you need to set the matching value at the Claim Owner drop-down list.

Maintenance Cost

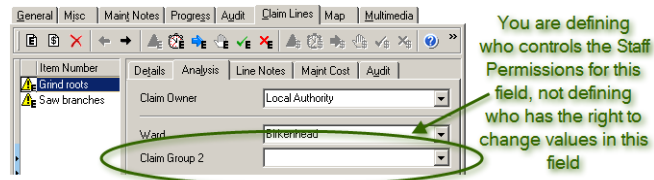
There are four fields on the Maintenance Cost panel of the Claim Lines tab on the **Dispatch** maintenance screen and in **Pocket RAMM**.



The Contract with the Network Owner may specify which party or parties to the Contract are to have the right to grant a user permission to change these values. If so, you need to set the matching value at the Maintenance Cost drop-down list.

Claim Group 2

When you add an Estimate or Claim line in **Pocket RAMM**, the Group 2 field on the Analysis tab may have a value to show to which Claim Group the Dispatch costs belong. If so, unlike the graphic above where the field is named Group 2, it will have the name you gave it at the Claim Group tab on the **Contract Details** screen. See Adding Claim Groups (on page 142).

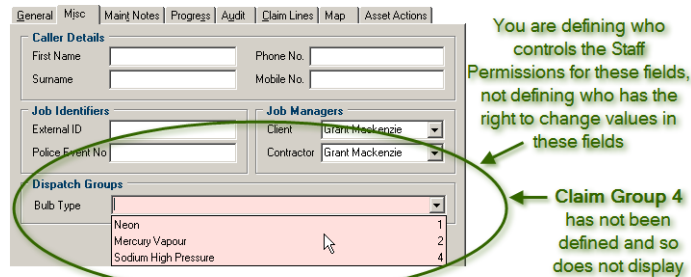


The Contract with the Network Owner may specify which party or parties to the Contract are to have the right to grant a user permission to change this value. If so, you need to set the matching value at the Claim Group 2 drop-down list.

Dispatch Groups 2 and 4

When you add a Job in **Pocket RAMM** or a Dispatch in **RAMM Contractor**, the Dispatch Group 2 and 4 fields on the Misc tab may display. If so, they will not have the names Dispatch Group 2 and Dispatch Group 4, they will have the names you gave them at the **Dispatch Group (Asset Type)** screen. See Adding a Dispatch Group (on page 92).

In the graphic below it is named Bulb Type.



The Contract with the Network Owner may specify which party or parties to the Contract are to have the right to grant a user permission to change this value. If so, you need to set the matching value at the Dispatch Group 2 drop-down list.



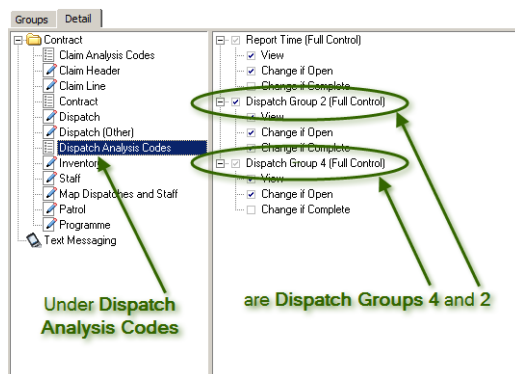
Once the Contract has been opened, only the Network Owner can change these settings.

NOTE

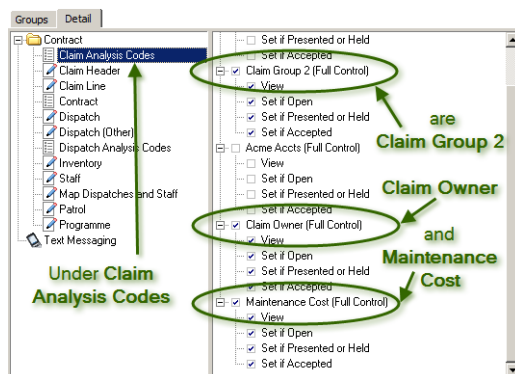
Staff Permissions

The Staff Permissions to which you are defining control are available at the Detail tab of the **Staff Permissions** screen.

The Permissions for the fields which display on the Misc tab of the **Dispatch** screen are found under Dispatch Analysis Codes.



The Permissions for the fields which display on the Analysis tab of the Claim Lines tab of the **Dispatch** screen are found under Claim Analysis Codes.



Setting Permission Control

Introduction

The Claim Owner, Maintenance Cost, Claim Group 2 and Dispatch Groups 2 and 4 values apply to all Contracts of the relevant Asset Type. You need to define who controls Staff Permissions for these five critical fields or panels. Once set, these controls can be changed only by the Network Owner.

Before you do this you need to have:

- added the initial Contract details. You do this at the General tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).

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

Menu Path

Follow the menu path (add initial Contract details) > (press Contract Options) > (press Permission Control) to open the **Contract Details** screen at the Permission Control tab.

► To Set Permission Control

The screenshot shows the 'Contract Details' window with the 'Permission Control' tab selected. The left pane lists contracts, with 'Acme Roading 2008/9' highlighted. The main pane shows the following settings:

Field	Value
Claim Owner	Both can control the user permissions
Maintenance Cost	Network Owner controls the user permissions
Claim Group 2	Network Owner controls the user permissions
Dispatch Group 2	Network Owner controls the user permissions
Dispatch Group 4	Network Owner controls the user permissions

Below the fields, a note states: 'These settings cannot be changed once the Contract has been 'Opened' unless you are the Network Owner.'

To do this you follow these steps:

- 1 Consult the contract to see if there are requirements to control Staff Permissions on the Claim Owner, Claim Group 2, Dispatch Group 2 and Dispatch Group 4 fields and the Maintenance Cost Group panel.
- 2 Set the above fields so that they match the contract provisions. If the contract does not prescribe the settings then use the ones in the graphic above.
- 3 Press to save your changes.
- 4 Go to Setting a Default Value for a Field (on page 206).



Please note that you are not defining who has the right to change values in these fields. You are defining who controls the Staff Permissions. These are found in the Detail tab of the **Staff Permissions** screen.

Texting

At the Contracts Options Texting tab, there is an Email Address field. This currently is for information only and serves no functional purpose in **RAMM Contractor**.

Auditing

RAMM Contractor can keep a variety of audit records. These are for changes to Dispatches, Claim and Estimate lines, Claim Headers and to the Contract itself. You select the actual audit records you want to keep for a Contract. You should make this selection when setting up the Contract as **RAMM Contractor** can not create audit records retroactively.

As you carry out your Contract you will want to keep audit records. If you have a small team and few users have permissions to make changes, then you will not need to keep a large audit trail. However, if there are a large number of users making changes you will want to keep full audit records so that you have an audit trail when things go wrong.

Audit Dispatch

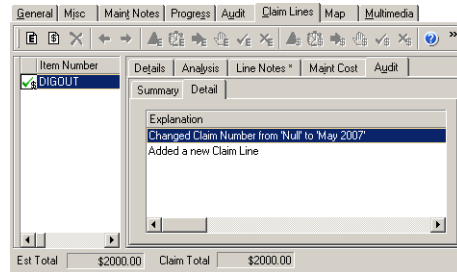
When setting up a Contract you have the option to have all changes to a Dispatch recorded as Audit records. Normally you would want to select this option as this creates an audit trail. If you do not use **Pocket RAMM** but use a paper or manual system to enter Dispatches you may not want to select this option. Similarly, if you are a small one person operation there may be no need.

If you choose to have **RAMM Contractor** keep audit records for Dispatches they will display at the Detail tab of the Audit tab on the **Dispatch** maintenance screen.

Explanation	Date added	Added by	Change Source
Changed Council code from " " to "AAA"	06/06/2008 09:34	Grant Mackenzie	RAMM Cont
Changed Event ID from " " to "123"	06/06/2008 09:34	Grant Mackenzie	RAMM Cont
Changed Date Sent from "6/06/2008 9:" to "6/06/2008 09:34"	06/06/2008 09:34	Grant Mackenzie	RAMM Cont
Changed Event Code from "Null" to "Cov"	06/06/2008 09:34	Grant Mackenzie	RAMM Cont
Added a new Dispatch Progress	06/06/2008 09:11	Grant Mackenzie	RAMM Cont
Added a new Dispatch Progress	06/06/2008 09:10	Grant Mackenzie	RAMM Cont
Added a new Dispatch Progress	06/06/2008 09:09	Grant Mackenzie	RAMM Cont
Changed Priority from "When Budget All" to "04/06/2008 12:33"	04/06/2008 12:33	Grant Mackenzie	RAMM Cont
Changed Call Status from "No Action Rv" to "23/05/2008 15:54"	23/05/2008 15:54	Grant Mackenzie	RAMM Cont
Changed Call Status from "Entered" to "1" 23/05/2008 15:53	23/05/2008 15:53	Grant Mackenzie	RAMM Cont
Changed Call Status from "Dispatched" to "1" 23/05/2008 15:51	23/05/2008 15:51	Grant Mackenzie	RAMM Cont
Changed Call Status from "No Action Rv" to "23/05/2008 15:51"	23/05/2008 15:51	Grant Mackenzie	RAMM Cont
Changed Call Status from "Entered" to "1" 23/05/2008 15:50	23/05/2008 15:50	Grant Mackenzie	RAMM Cont
Changed Call Status from "Dispatched" to "1" 23/05/2008 15:50	23/05/2008 15:50	Grant Mackenzie	RAMM Cont
Added a new Dispatch Entry	09/10/2007 12:02	Grant Mackenzie	RAMM Cont
Added a new Dispatch Entry	09/10/2007 12:02	Grant Mackenzie	RAMM Cont

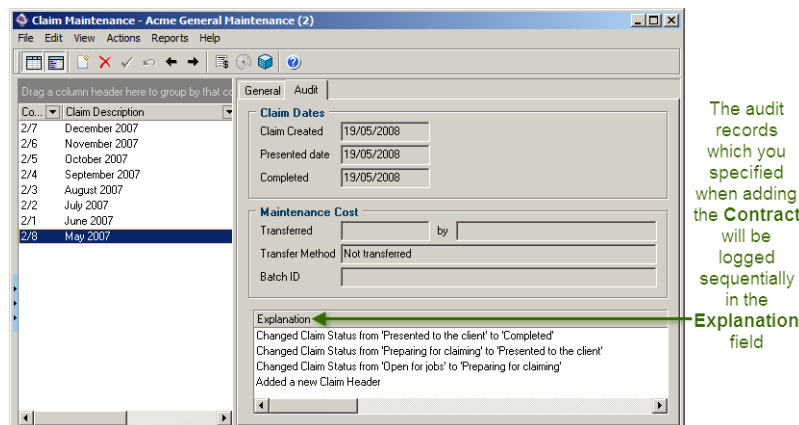
Audit Claim

If you choose to have **RAMM Contractor** keep audit records for Claim and Estimate lines they will display at the Detail tab of the Audit tab at the Claim Lines tab on the **Dispatch** maintenance screen.



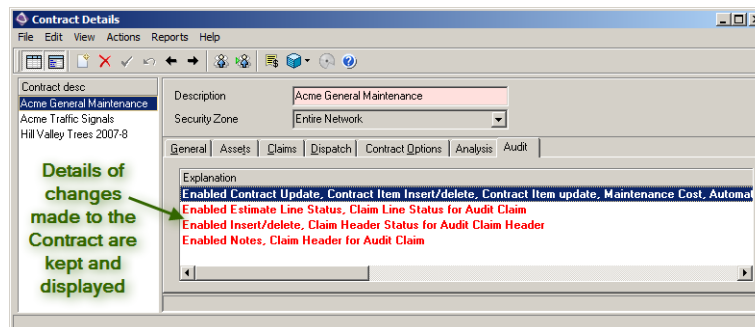
Audit Claim Header

If you choose to have **RAMM Contractor** keep audit records for Claim Headers they will display at the Audit tab of the **Claim Maintenance** screen.



Audit Contract

If you choose to have **RAMM Contractor** keep audit records for Contract they will display at the Audit tab of the **Contract Details** maintenance screen.



Setting Audit Record Options

Introduction

You can set **RAMM Contractor** to keep an audit trail of changes to Dispatches, Claim and Estimate lines, Claim Headers and to the Contract itself. You should make the Audit record decisions when setting up the Contract so that records are kept from the start. **RAMM Contractor** will only keep records from the time you tell it to do so. **RAMM Contractor** can not create audit records for actions which have already occurred.

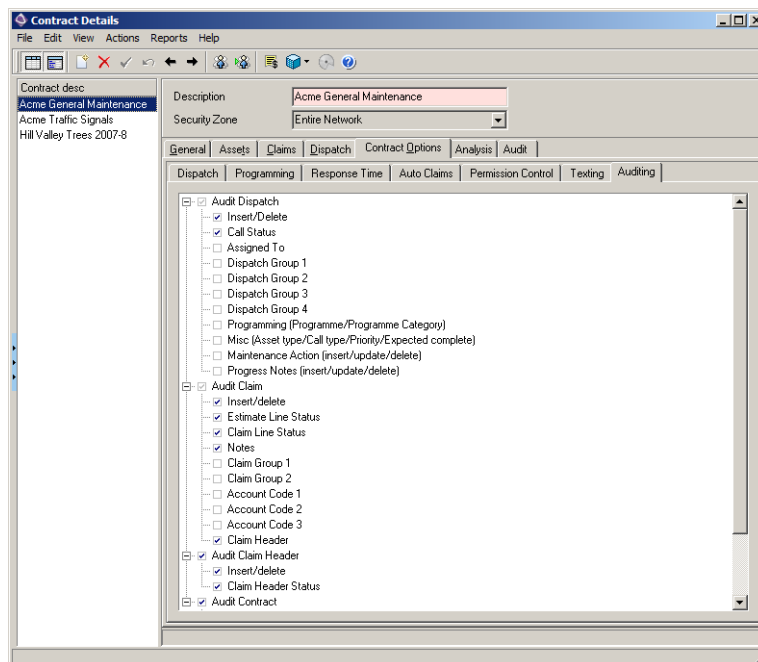
Before you do this you need to have:

- added the initial Contract details. You do this at the General tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a copy of the contract to which to refer if necessary.



Menu Path

Follow the menu path (add initial Contract details) > (press Contract Options) > (press Auditing) to open the **Contract Details** screen at the Auditing tab.

► To Set Audit Record Options



To do this you follow these steps:

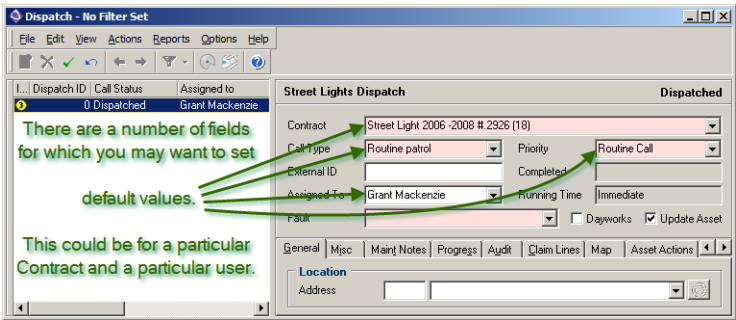
- 1 Press  to open the tree under the heading whose audit record details you wish to set.
- 2 Select the required options.
- 3 If you want to set options for another group, go to step 1. Otherwise go to step 4.
- 4 Press  to save your changes.

General Contract Parameters

You may need to set field defaults and manage Offline synchronisation for **Pocket RAMM** users.

You can set fields in **RAMM Contractor** to have default values. These are defaults for tables and related columns. You can do this for just one user or for all users in a Contract. This can be useful when completing the various fields in the **Dispatch Entry** and other screens.

Pocket RAMM users often work Offline, unconnected to the broadband network. They enter their work and then synchronise with the database. You make the synchronisation process as short and efficient as possible for individual users. You limit the data exchanged to that which is relevant to the particular user. For instance, Street Lights operators do not need Footpath data updated.



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Default Values

You can set fields in **RAMM Contractor** to have default values.

You do this at the **Column Default Values** screen. You set defaults for a number of tables and related columns in **RAMM Contractor**. It can be useful when completing the various fields in the **Dispatch Entry** and other screens.

Single Asset Contracts

If you have a single Asset Contract such as for Signs or Street Lights, you may want to set the Call Type, Contract, Priority and other fields to default to particular values.

You can do this for just one user or for all users in a Contract.



Remember, if you do not restrict the application of the Defaults to a particular user they will apply to all users. This may create more problems than it solves.

Setting a Default Value for a Field

Introduction

You can set fields in **RAMM Contractor** to have default values. These are defaults for tables and related columns. You can do this for just one user or for all users in a Contract. This can be useful when completing the various fields in the **Dispatch Entry** and other screens.

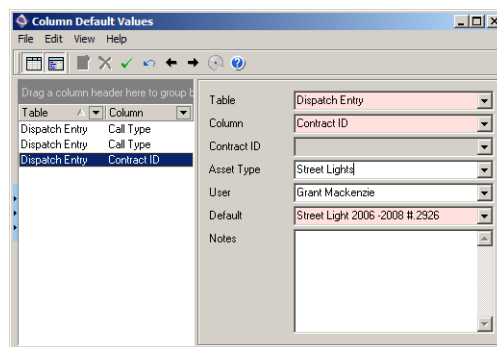
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- added the users and granted Staff Permissions. You do this at the **Staff Permissions** maintenance screen. See Adding Staff to a Contract (on page 118).



Menu Path

Follow the menu path Maintenance > Default Values to open the **Column Default Values** screen.

► To Set a Default Value for a Field



To do this you follow these steps:

- 1 Press CTRL+N or  to add a new record.
- 2 Select, from the **Table** drop-down list, the **RAMM** table which contains the column for the field value. The list is not in alphabetical order.
- 3 Select, from the **Column** drop-down list, the column which contains the default value.
- 4 If you want to restrict the default value to a particular Contract, select it from the **Contract** drop-down list.
- 5 If you want to restrict the default value to a particular Asset Type, select it from the **Asset Type** drop-down list.
- 6 If you want to restrict the default value to a particular user, select the user from the **User** drop-down list.
- 7 Select the default value from the **Default** drop-down list.
- 8 Type useful explanatory notes in the **Notes** field. 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.
- 9 Press  to save the record.
- 10 If you want to set another default value, go to step 1. Otherwise, go to step 11.
- 11 Close the screen in the normal manner to be returned to the **RAMM Contractor** main screen.

Offline Synchronisation

Pocket RAMM users will sometimes work offline. This is where they work without being connected to the 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.

Users do their work and then synchronise at a time of their choosing.

It is this synchronisation process which you manage for individual users.

Manage Offline Synchronisation

When users synchronise their PDAs, one way to make the process as short and efficient as possible is to limit the data exchanged to only that which is relevant to the particular user.

For instance, if the user deals only with Street Lights, they do not need to update information related to Footpaths.

So you use the **Add Synchronisation for User** screen to limit data exchange for a user when synchronising.

Core Data

Whatever data is exchanged at the time of synchronisation, there is a group of Core data which must always be updated. This is data such as Roads and Staff Permissions. The Core Table Group is the default. Every user will have the Core Table Group selected. This option is not available to deselect.



Offline synchronisation management is not available unless you are logged in to the **RAMM** Hosting Service. If you have a stand-alone version of **RAMM Contractor** then this option will not be available.

Managing Offline Synchronisation

Introduction

Pocket RAMM users will sometimes work offline. This is where they work without being connected to the broadband network. You speed up the resulting synchronisation process for Offline **Pocket RAMM** users by limiting the data synchronised to defined Table Groups.

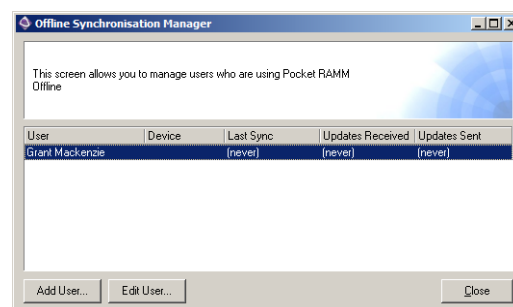
Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- added the users and granted Staff Permissions. You do this at the **Staff Permissions** maintenance screen. See Adding Staff to a Contract (on page 118).
- logged in to the **RAMM Hosting Service**. Offline synchronisation management is not available to those on stand-alone versions of **RAMM Contractor**. See Logging in to the **RAMM** Hosting Service (on page 17).

Menu Path

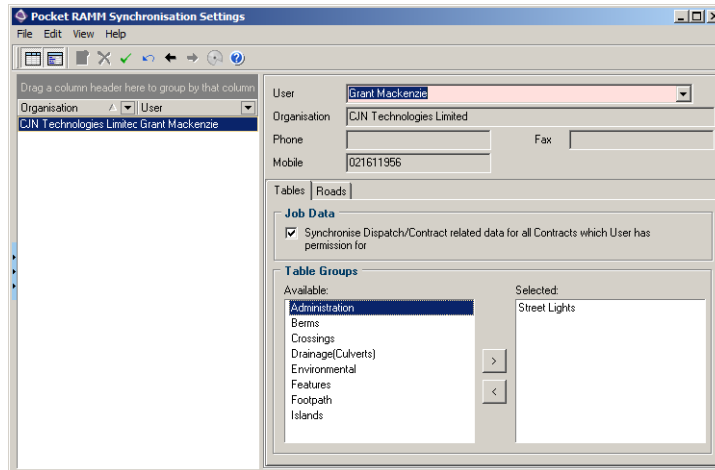
Follow the menu path Maintenance > Pocket RAMM Synchronisation Settings to open the **Offline Synchronisation Manager** screen.

► Managing Offline Synchronisation for Pocket RAMM Users



To do this you follow these steps:




- 1 Press **Add User...** to add synchronisation for a user. The **Add Synchronisation for User** screen will open.

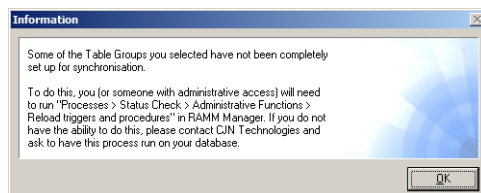


- 2 Select, from the Available panel, the Table Groups to synchronise.



You can select multiple adjacent Table Groups by highlighting the first one, holding down the ALT key and then selecting the last Table Group. You can select multiple Table Groups which are not contiguous by holding down the CTRL key and selecting them in turn.

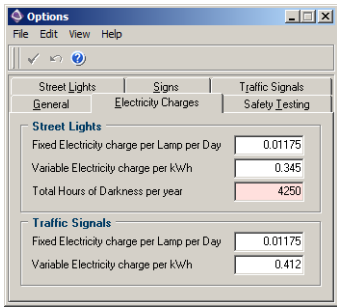
- 3 Press  to shift the selected Table Groups from the Available panel to the Selected panel.
- 4 If you have moved Table Groups from the Available panel to the Selected panel in error, select them and press  to shift them back.
- 5 Press . The **Add Synchronisation for User** screen will close and you will be returned to the **Offline Synchronisation Manager** screen.
- 6 It is possible the following screen will have opened instead. If so, you will need to run the Status Check outlined.



- 7 To add synchronisation for another user, go to step 1. Otherwise, go to step 8.
- 8 Close the screen in the normal manner to return to the **RAMM Contractor** screen.

Signs, Street Lights and Traffic Signals Options

There are a number of options which relate only to Signs, Street Lights and Traffic Signals. If your Contract does not deal with these Asset Types you should ignore this chapter.



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Electricity Charges Options	214
Safety Testing Options.....	215
Street Lights Options	216
Signs Options	219
Traffic Signals Options	220

Introduction to the Stock Asset Type Options

There are a number of options which relate only to Signs, Street Lights and Traffic Signals.

General Options

You can define the name of the database as it appears on reports. You can also define tolerances related to **Pocket RAMM**.

See General Options (on page 213).

Electricity Charges Options

You can set values to be used in a number of reports related to the cost of electricity usage.

See Electricity Charges Options (on page 214).

Safety Testing Options

You can set default safety tests to be carried out when performing Street Light and Traffic Signals Jobs.

See Safety Testing Options (on page 215).

Street Lights Options

You can set Warranty, Guarantee, Line Company and Power Company options for Street Lights.

See Street Lights Options (on page 216).

Signs Options

You can set Post Details, Sign Location Optional and Sign Link options for Signs.

See Signs Options (on page 219).

Traffic Signals Options

You can set Warranty, Guarantee, Line Company and Power Company options for Traffic Signals.

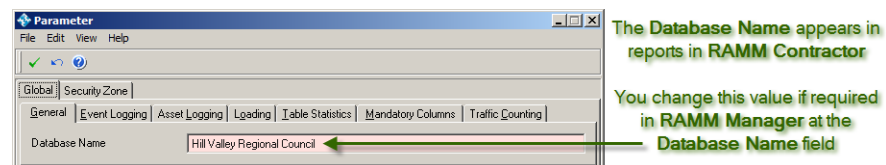
See Traffic Signals Options (on page 220).

General Options

There are two option sections at the General tab. First you have the option to name the database. Secondly, you set tolerances for **Pocket RAMM**.

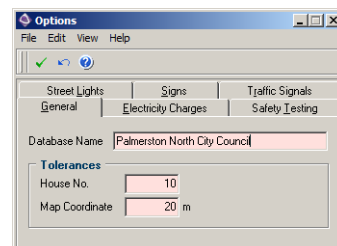
Database Name

The value in the Database Name field appears in the second line of reports which you print. If you want a different name to appear, you change this in **RAMM Manager** by following the menu path Maintenance > Parameter and changing the value in the Database Name field on the General sub tab of the Global tab.



Tolerances

You can set **Pocket RAMM** House No and Map Coordinate tolerances.

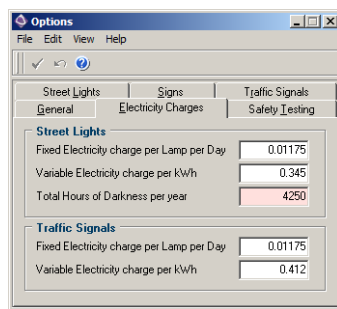


The House No tolerance is used for Job Sheets. For instance, if a Job Sheet for a Street Light is being created and the House No tolerance is set to 10 as above, all Street Lights within plus or minus ten house numbers will be listed. So if the Job was created outside number fifty, then any Street Lights outside forty to sixty will be listed in the Job Sheet as possible Street Lights for the Job.

The Map Coordinate tolerance is used when a Job for Traffic Signals, Street Lights or Signs is being added in **Pocket RAMM**. In the example above the value 20m is used. So if a **Pocket RAMM** user were outside number fifty adding a Street Light Job, then **Pocket RAMM** would check for any other Street Light Jobs within a twenty meter radius of the current GPS position. If it found a Job then it would ask the user to check that they were not adding a duplicate Job for the same Asset.

Electricity Charges Options

There are two option sections at the Electricity Charges tab. You have the option of setting default values for the Street Lights and Traffic Signals reports named the Electricity & Maintenance Cost report.



Street Lights

There are two optional electricity cost values and the mandatory Total Hours of Darkness per year value.

- **Fixed Electricity charge per Lamp per day**
This is the standard electricity charge for every Lamp in the Network.
- **Variable Electricity charge per kWh**
This is the charge for electricity actually used by the Street Lights.
- **Total Hours of Darkness per year**
This is the average number of hours of darkness in your Contract area.

Traffic Signals

There are two optional electricity cost values and no Total Hours of Darkness per year value as Traffic Signals operate whether or not it is dark.

- **Fixed Electricity charge per Lamp per day**
This is the standard electricity charge for every Traffic Signal in the Network.
- **Variable Electricity charge per kWh**
This is the charge for electricity actually used by the Traffic Signals. This usage is measured by the Controller.

Electricity & Maintenance Report

The values which you set in the Electricity Charges tab will default into the appropriate fields when running the **Electricity & Maintenance Cost** report, unless you choose to use values from the Power Company.

This report will generate an overview of the Electricity and Maintenance costs for February 2008.

☐ Use Power Company Values

Fixed charge

Variable charge

Total Darkness (hrs)

Check for Default Value

☒ Fixed Electricity charge per Lamp per Day 0.01175

☒ Variable Electricity charge per KWh 0.345

☒ Total Hours of Darkness per year 4250

Preview Print Close

If you clear the Use Power Company Values option

The values from the Electricity Charges tab will default

Safety Testing Options

There are two option sections at the Safety Testing tab. You have the option of setting default values for the Street Lights and Traffic Signals Jobs.

Options

File Edit View Help

Street Lights Signs Traffic Signals

General Electricity Charges Safety Testing

☐ Street Light Safety Testing

SLIM Test Definition 1 Polarity

SLIM Test Definition 2 Neutral/Earth Continuity

SLIM Test Definition 3 Phase/Earth Insulation

SLIM Test Definition 4 Neutral/Earth Insulation

SLIM Test Definition 5 Earth Loop Impedance

SLIM Test Definition 6 Door Earth Loop Impedance

SLIM Test Definition 7

SLIM Test Definition 8

☐ Traffic Signal Safety Testing

Traffic Signal Test 1 Polarity

Traffic Signal Test 2 Neutral/Earth Continuity

Traffic Signal Test 3 Phase/Earth Insulation

Traffic Signal Test 4 Neutral/Earth Insulation

Traffic Signal Test 5 Earth Loop Impedance

Traffic Signal Test 6 Door Earth Loop Impedance

Traffic Signal Test 7

Traffic Signal Test 8

Street Light Safety Testing

There are eight user-defined safety tests which you can have appear at the bottom of the full Dispatch report for Street Lights. The six default options are displayed above.

So if you want to have named **Safety Testing** check boxes on the bottom of every printed Job Sheet for Street Light Dispatches, select the **Street Light Safety Testing** option. You can see in the graphic below what the section will look like on the Job Sheet.

Safety Test Results

- | | | |
|---|---|--|
| <input type="checkbox"/> Polarity | <input type="checkbox"/> Neutral/Earth Continuity | <input type="checkbox"/> Phase/Earth Insulation |
| <input type="checkbox"/> Earth Loop Impedance | <input type="checkbox"/> Neutral/Earth Insulation | <input type="checkbox"/> Door Earth Loop Impedance |

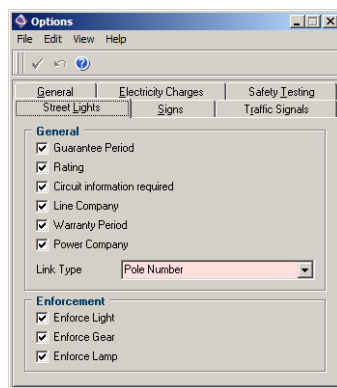
Traffic Signal Safety Testing

There are eight user-defined safety tests which you can have appear at the bottom of the full Dispatch report for Traffic Signals. There are no default options.

So if you want to have named **Safety Testing** check boxes on the bottom of every printed Job Sheet for Traffic Signal Dispatches, select the **Traffic Signal Safety Testing** option. You can see in the graphic above what the section will look like on the Job Sheet.

Street Lights Options

There are two option sections at the **Street Lights** tab. You have **General** options related to Street Lights and **Enforcement** options related to Dispatches for Street Light component replacement.



General Options

- **Guarantee Period**

If you select this option for Street Lights, the comment **This pole is still under guarantee** will be printed on Job Sheets for Dispatches for any poles still under guarantee. The guarantee period is for one year.

This indicates to the Contractor that any fault with this pole is the responsibility of the company that installed it. You select a **Guarantee Date** for a pole during the Street Light entry process at the **Guarantee Date** drop-down calendar on the **Pole General** tab on the **Street Lights** maintenance screen.

The screenshot shows the 'Pole General' tab of the 'Street Lights' maintenance screen. The 'Guarantee Date' field is highlighted with a green circle. A green arrow points from the explanatory text to this field.

You can select a **Guarantee Date** but the **Warning** on printed **Job Sheets** will display only if you have selected the **Guarantee Period** option at the **Options** screen **Street Lights** tab.

- **Rating**

If you select this option for Street Lights, you can associate Asset Ratings as part of the Street Lights entry procedure.

The screenshot shows the 'Rating' tab of the 'Street Lights' maintenance screen. A green arrow points from the explanatory text to the 'Rating' tab.

- **Circuit Information Required**

If you select this option for Street Lights, there is no discernable effect. This was once used to make certain Lookups under the menu path **Inventory > Lookups > Street Lights > Miscellaneous** available or unavailable. They are now always available.

- **Line Company**

If you select this option for Street Lights, the line company name will be made available with the circuit information.

- **Warranty Period**

If you select this option for Street Lights, then the option to add **Light**, **Gear** and **Lamp** **Warranty Period** information at the **Light**, **Gear** and **Lamp Make-Model** screens becomes available. The resulting information is used in the **Warranty Failure** report.

The screenshot shows the 'Models' tab of the 'Light Make-Model' screen. A green arrow points from the explanatory text to the 'Light Warranty Period' field.

At the **Models** tab, the **Light Warranty Period** field becomes available

- **Power Company**

If you select this option for Street Lights or Traffic Signals, the **Power Company** field on the Pole General tab on the **Street Lights** maintenance screen becomes enabled.

Link Type

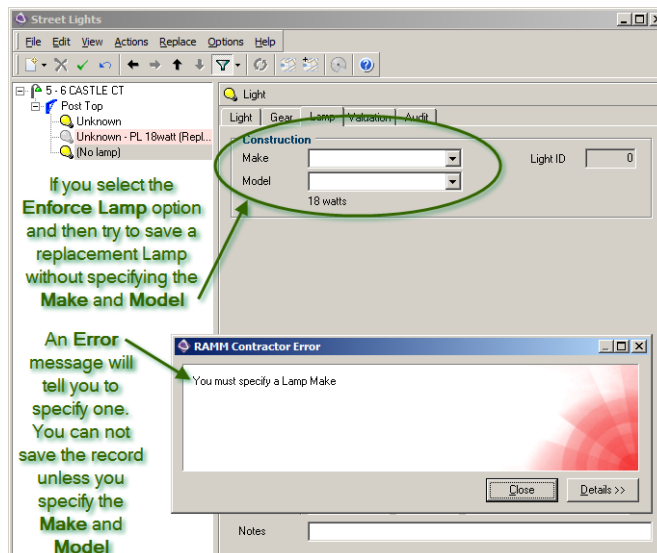
This option has been superseded. When you add a Dispatch for Asset Type, Street Light, the Likely ID drop-down list in the Asset section will always have the three following values regardless of what you select at the Link drop-down list.

- Map Pole ID
- Pole Number
- Power Board Number.

The same fields are also available at the Pole Identifier tab on the **Street Lights** maintenance screen.

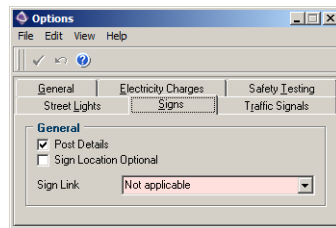
Enforcement Options

You control whether users, when replacing Lights, Gear or Lamps at the **Street Lights** maintenance screen, will be forced to enter values at the Make and Model fields. If you do not select the Enforce Light, Enforce Gear and Enforce Lamp options, then users can replace Lights, Gear or Lamps without specifying the Make and Model.



Signs Options

There are three options at the Signs tab. You set Post Details, Sign Location Optional and Sign Link options.

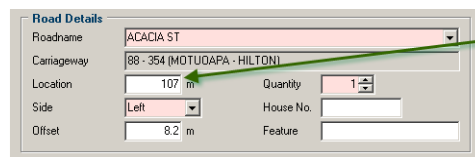


Post Details

When you add and maintain a Sign, if you have no interest in keeping the details of the Post in **RAMM Contractor**, then clear the Post Details option.

Sign Location Optional

When you add and maintain a Sign, if you have no interest in keeping the details of the Location in metres of the Sign in **RAMM Contractor**, then select the Sign Location Optional option. Otherwise the Location field in the Road Details section on the General tab of the **Signs** maintenance screen will be mandatory.



The Location field is optional if you have selected the Sign Location Optional option

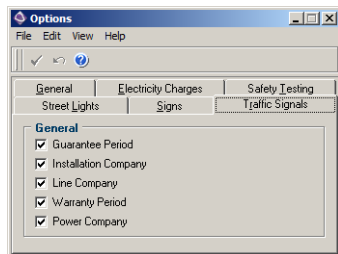
Sign Link

This option has been superseded. When you add a Sign at the **Street Lights** maintenance screen, the following fields are available at the General tab regardless of what you select at the Sign Link drop-down list.

- Sign Number
- Sign ID
- Easting
- Northing.

Traffic Signals Options

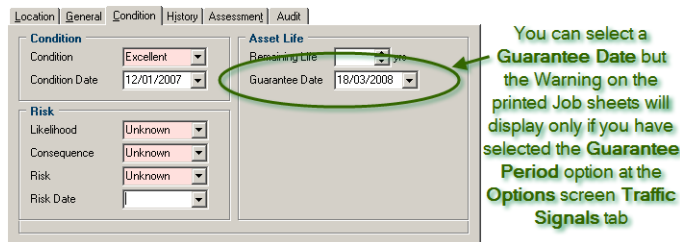
There are General options related to Traffic Signals.



General Options

- **Guarantee Period**

If you select this option for Traffic Signals, the comment **This pole is still under guarantee** will be printed on Job Sheets for Dispatches for any poles still under guarantee. The guarantee period is for one year. This indicates to the Contractor that any fault with this pole is the responsibility of the company that installed it. You select a **Guarantee Date** for a pole during the Traffic Signal entry process. You do this at the **Guarantee Date** drop-down calendar in the **Asset Life** section of the **Condition** tab on the **Traffic Signals** maintenance screen.



- **Installation Company**

If you select this option for Traffic Signals, it has no effect. The **Company** drop-down list at the **Installed** section of the **History** tab on the **Controller** and other panels at the **Traffic Signals** screen remains available and optional whether or not this option is selected.

- **Line Company**

If you select this option for Traffic Signals, it has no effect. The **Line Company** drop-down list at the **Power** section of the **General** tab on the **Controller** and other panels at the **Traffic Signals** screen remains available and optional whether or not this option is selected.

- **Warranty Period**

If you select this option for Traffic Signals, then the option to add Attachment, Detector Card, Duct, End Box, Logic Rack, Loop and Pedestrian Call Box Warranty Period information at the **Attachment, Cable, Communication Device, Controller, Detector Card, Duct, End Box, Logic Rack, Loop** and **Pedestrian Call Box Make-Model** screens becomes available. The resulting information is used in the **Warranty Failure Report**.

- **Power Company**

If you select this option for Traffic Signals, it has no effect. The Supply Company drop-down list at the Power section of the General tab on the Controller and other panels at the **Traffic Signals** screen remains available and optional whether or not this option is selected.

Claim Options

You need to set up Claim lines to correspond to the provisions of the contract with the Network Owner. In particular, whether On-cost should be enabled and also whether Maintenance Cost values should be required on the Claim line if they are required on the Schedule Item. You can set up default Headers and Footers for the Claim reports as well.

The screenshot shows the 'Claim Options' form with the following fields and values:

- Contract ID: Acme General Maintenance
- Claim Number: 4
- Claim Description: September 2007
- Claim Status: Presented to the client
- Period: 1/09/2007 - 30/09/2007
- Financial Year: 2007/08
- Payment Due: 20/10/2007
- Payment No.:
- Notes:

Annotations on the right side of the form:

- When you change the status of the Claim to Presented to the Client (pointing to the Claim Status field)
- the Payment Due date will default according to the value set at the Claim Options tab on the Contract Details screen (pointing to the Payment Due field)

In This Chapter

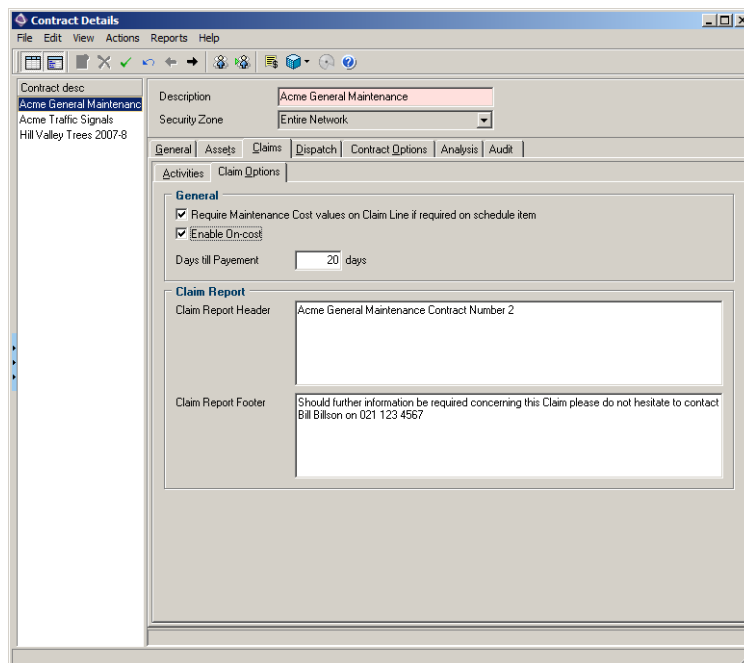
Introduction to Claim Options.....	224
Days Until Payment.....	224
Maintenance Cost List	225
Maintenance Cost Values Required.....	226
Use Default Rates.....	227
Enable On-cost.....	228
Enable Cost Escalation	229
Claim Report Headers and Footers	230

Introduction to Claim Options

You can set up General Claim line parameters related to Maintenance Costs and On-cost. You can set a default due date for Claim payment and if the contract requires, you can also set a defined Report Header and Report Footer for all printed Claim reports.

See:

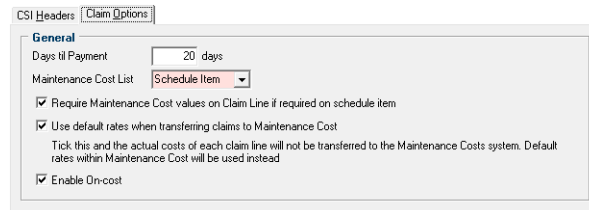
- Days Until Payment (on page 224)
- Maintenance Cost Values Required (on page 226)
- Use Default Rates (on page 227)
- Enable On-cost (on page 228)
- Enable Cost Escalation (on page 229)
- Claim Report Headers and Footers (on page 230).



Days Until Payment

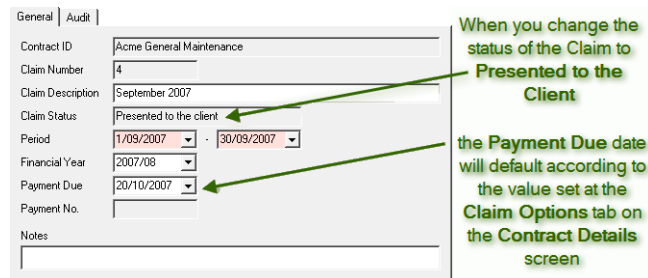
A contract between a Contractor and a Network Owner prescribes the due date for payment once a Claim has been presented.

You can set a value in the Days til Payment field which will default when a Claim Header is Presented to a Network Owner.



If you have set a value at the Days til Payment field on the Claim Options tab of the **Contract Details** screen, then, when you change the status of a Claim to Presented to the client, **RAMM Contractor** will calculate the date when payment is due and default this value into the Payment Due field.

Otherwise you select a date from the Payment Due drop-down calendar to show the due date for payment of the Claim.

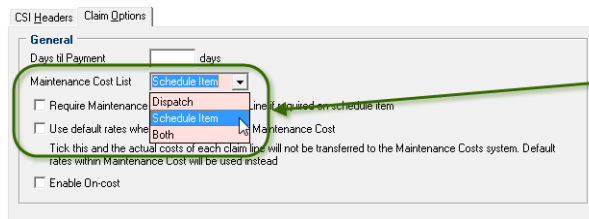


Maintenance Cost List

You select, at the Maintenance Cost List drop-down list, the value to determine how **RAMM Contractor** will select Maintenance Costs values for Transfer. The option you select should align with the manner in which you have set up your Maintenance Costs data.

There are two set up options for determining the assignment of Maintenance Costs values to Dispatches. Some operators assign Maintenance Costs values to the Dispatch as a whole. They do this by associating them with the Dispatch Fault Category. Others prefer the more granular approach of associating them with each individual Claim line. They do this by associating them with individual CSIs (Contract Schedule Items).

It is also possible to use a combination of the two. For instance many operators associate Dayworks Dispatch Maintenance Costs values to the Fault Category, and therefore to the Dispatch as a whole, but associate Programmed Dispatch Maintenance Costs values to the CSIs and so to individual Claim lines.



Select the **Maintenance Cost List** option which matches your business practices

Maintenance Costs Transfer Values

You determine how **RAMM Contractor** will select Maintenance Costs values for Transfer. You make your selection based on which of the business practices above, you have adopted. Your options are to transfer Maintenance Costs by:

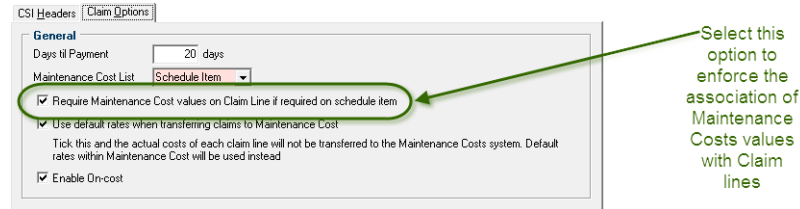
- **Dispatch**
You would select this option if you have set up your Maintenance Costs values to be associated with the **Fault Category**, and therefore to the Dispatch as a whole
- **Schedule Item**
You would select this option if you have set up your Maintenance Costs values to be associated with the CSIs and therefore with individual Claim lines
- **Both**
You would select this option if you have set up your Maintenance Costs values to be associated with both of the options above.

Maintenance Cost Values Required

When you associate Maintenance Cost items with CSIs (Contract Schedule Items), you have the option of defining them as:

- **No Transfer**
No Maintenance Cost data will ever be transferred to the **RAMM** Maintenance Cost system. You use this setting if you do not use **RAMM** Maintenance Costs.
- **Optional**
You will have the option of not transferring Maintenance Cost data from Claim Lines associated with CSIs to the **RAMM** Maintenance Cost system. You use this setting if you want to have this option. This is not recommended.
- **Required**
All Maintenance Cost data from Claim Lines associated with CSIs will be transferred to the **RAMM** Maintenance Cost system. You should use this setting.

See CSI Maintenance Cost (on page 239).



Require Maintenance Cost Values on Claim Line if Required on Schedule Item

If the Require Maintenance Cost Values on Claim Line if required on schedule item check box is cleared, then Maintenance Cost items will not be required to be associated with Claim lines whatever the setting for the Maintenance Cost items is for the CSI.

If the check box is selected and the Maintenance Cost data is Required to be transferred for the CSI associated with the Claim line, then you can not save the Claim line unless the Maintenance Cost data exists.

You associate Maintenance Cost data with Claim lines at the **Maintenance Cost** tab of the **Contract Schedule Item** screen.

See Associating Maintenance Cost Items (on page 242).

Use Default Rates

You should use Default Conversion Rates when Transferring Claim transaction costs to **RAMM** Maintenance Costs or importing the transaction costs from an external program if:

- your Contracts have no specified rates, such as in PSMC, Hybrid or Alliance type contracts or
- the rates vary so widely between Contracts as to make straight cost comparisons meaningless.

You then compare the Activities only, or if you compare costs, you understand that these are not the actual costs.

Default Rate Transfer

You must select the Use default rates when transferring claims to Maintenance Costs option if you intend using Default Rates for Maintenance Cost transfer.

CSI Headers Claim Options

General

Days til Payment: 20 days

Maintenance Cost List: Schedule Item

☒ Require Maintenance Cost values on Claim Line if required on schedule item

☒ Use default rates when transferring claims to Maintenance Cost

Tick this and the actual costs of each claim line will not be transferred to the Maintenance Costs system. Default rates within Maintenance Cost will be used instead

☒ Enable On-cost

Select this option to use Default Rates for transfer of data to RAMM Maintenance Costs

You set up Default Rates at the **Activity** maintenance screen. See Set Default Rates (on page 70).

Enable 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**.

If the contract with the Network Owner allows for On-costs, you should select the Enable On-cost check box.

CSI Headers Claim Options

General

Days til Payment: 20 days

Maintenance Cost List: Schedule Item

☒ Require Maintenance Cost values on Claim Line if required on schedule item

☒ Use default rates when transferring claims to Maintenance Cost

Tick this and the actual costs of each claim line will not be transferred to the Maintenance Costs system. Default rates within Maintenance Cost will be used instead

☒ Enable On-cost

If you select the Enable On-cost check box and save your changes, a **Warning** screen will open advising you to select a CSI against which to record On-cost.

You do this at the **Contract Schedule Items** screen by following the menu path Actions > Select On-cost Item. See Setting up On-cost (on page 256).

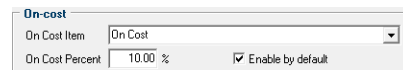
Warning

You have enabled On-cost for this Contract. You will now need to select a Schedule Item for the On-cost to be recorded against. You can do this in the Schedule Items screen (under Actions -> Select On-cost Item). This Item will be added once to each Dispatch which has Estimates and/or Claim Lines with On-costs.

OK

On-cost


When you enable On-cost, the On-cost section becomes available on the **General** tab of the **Contract Schedule Items** screen.



Enable Cost Escalation

Cost Escalation is a Contract provision to allow groups of Contract costs to be increased during the term of the Contract. The escalation is by an agreed percentage and frequency. It commences from an agreed **Initiation Date**. The rate of Cost Escalation may vary by item. Contract items subject to the same Cost Escalation imperatives are grouped under the same **Cost Escalation Category**.

You select **Enable Cost Escalation** if the Contract allows for it. Once the Contract has been opened, the Cost Escalation parameters cannot be changed.



These fields are available only when the Contract is in the **Setting Up** state

Cost Escalation Frequency

You select how often the Cost Escalation percentage will be applied to match the Contract provisions. The available options at the **Cost Escalation Frequency** drop-down list are:

- Monthly
- Quarterly
- Six-monthly
- Yearly.

Cost Escalation Initiation Date

The Cost Escalation may be applied from the date chosen at the **Initiation Date** drop-down calendar. This date must be within the term of the Contract. You can apply Cost Escalation to Claim lines only if the Claim Headers with which they are associated have an **End Date** which is within the range of the **Initiation Date** and the date on which Cost Escalation is run.



You can enable Cost Escalation only prior to Opening the Contract in **RAMM Contractor**. Once the Contract has been Opened the Enable Cost Escalation option becomes set and is unable to be entered or edited.

Claim Report Headers and Footers

A Maintenance Contract can prescribe information which must be available on a printed Claim report. You can set values in the Claim Report Header and Claim Report Footer fields which will default when a Claim report is run.

Then when you run the Claims report and the **Claims** report selection screen opens, the values you have chosen will have defaulted. You can then override the default values if required.

You can have the details of nonstandard Claims in the report

You can simultaneously run the Analysis Codes and the Claim Details reports

You can sort the results by Asset Type, Dispatch ID, Date Entered or Road

You can set default report Headers and Footers when setting up the Contract.

You can override these values before running the report if required

To see how the Header and Footer appear in the printed report see Claim Report (on page 458).

Contract Schedule Items (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.

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Accounting and CSIs.....	237
Adding CSIs	238
CSI Maintenance Cost.....	239
Associating Maintenance Cost Items	242
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Restricting CSIs by Asset Type	245
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Viewing CSI Audit Records	247
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Introduction to CSIs

Contract Charges

A Contract between a Network Owner and a Contractor will specify the charges for particular maintenance activities under the Contract. You set up CSIs to match these agreed activities and charges.

Contract Line Item

A CSI is one cost component of a Claim under the Contract. It is equivalent to a line item in the Contract document.

So every Claim will have one or more CSIs attached to it. When the Claim is presented to the Network Owner, the schedule items show the breakdown of the work and the costs in the Claim.

RAMM Maintenance Cost

Each schedule item can also be set up for transfer to the **RAMM** Maintenance Cost system.

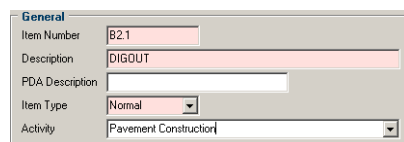
Automatic Claiming

If you have set up the Contract for Automatic Claiming, this is managed through CSIs.

CSI General Parameters

Once you have set up your Contract Schedule Item (CSI) Headers and Account codes, you can add the CSIs. They are the last items you should set up before opening a Contract.

General Section



The screenshot shows a software window titled "General" with the following fields and values:

Field	Value
Item Number	B21
Description	DIGOUT
PDA Description	
Item Type	Normal
Activity	Pavement Construction

Match Contract Values

It is important that your CSIs 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.

The Schedule Notes field can be used when a lengthier description of a CSI than will fit in the Description field is required.

PDA Description

If you and your staff use **Pocket RAMM**, then when adding a Job, you select CSIs at the Item drop-down list at the Details tab of the **Pocket RAMM Claim Line** screen. You may find that the actual wording in the Contract which describes the CSI and is reproduced in the Description field in the General section of the **RAMM Contractor** screen, is too long and unwieldy.

In this situation you define an abbreviated PDA Description which is more user-friendly in **Pocket RAMM**.

Item Type

One way to limit the number of CSIs available at the Item drop-down list at the Details tab of the **Pocket RAMM Claim Line** screen is by setting the CSI Item Type. There are three types available:

- **Dayworks**
These are ad hoc unexpected works that are outside the Contract document. They are usually charged on a per item basis such as the hire of a ten tonne truck.
- **Lump Sum**
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.
- **Normal**
These are everything else. They are for work charged at a specific rate rather than a fixed amount. For example, Digouts could be claimed for at a set rate per m².

Activity

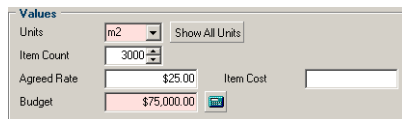
If CSI Headers have been set up, you have the option to associate each CSI with one. The Contract with the Network Owner should prescribe whether this is to be done.

CSI Headers are set up for the benefit of the Network Owner. They are available for reporting purposes across all Contracts set up against a database. They are used to group Schedule Items for reporting and analysis.

CSI Values

You define a variety of values for each CSI. These combine to give the line item value of an Estimate or Claim. The Unit and Agreed Rate values default directly into the Estimate or Claim Line.

Values Section

The screenshot shows a 'Values' dialog box with the following fields: 'Units' is a dropdown menu set to 'm2' with a 'Show All Units' button to its right; 'Item Count' is a numeric field set to '3000' with up and down arrows; 'Agreed Rate' is a currency field set to '\$25.00'; 'Item Cost' is an empty currency field; and 'Budget' is a currency field set to '\$75,000.00' with a small icon to its right.

Units

You must set the units for a CSI. You select the correct unit from the Units drop-down list. If the required unit is not available you press the adjacent Show All Units button to make a larger range available.

Item Count

You have the option of typing in the Item Count field, or using the adjacent Up and Down arrows, to enter an estimate of how often within the Contract you expect to Claim for the CSI. This value is combined with the value in the Agreed Rate field to calculate the Budget. Once you have opened the Contract and made Claims, you can compare this value with the actual number of presented Claims to date which have used the CSI by generating the Year to Date report.

Agreed Rate

You have the option of typing in the Agreed Rate for the CSI. This value is combined with the value in the Item Count field to calculate the Budget. You should enter a rate wherever possible. This is especially true if you plan to use this CSI with Automatic Claims. If there is no agreed rate you should set the value to \$0.

You can set Staff Permissions so that this rate can be deemed an Estimate only and may be altered when Claiming. Alternatively, you can set the Staff Permissions so that the rates are unable to be altered.

Budget

If you place values in the Item Count and Agreed Rate fields, **RAMM Contractor** will use these to calculate and default a budget figure when the focus is placed in the Budget field. Otherwise you can just type a value into the Budget field.

If you make an error in entering the values from which the Budget value has been calculated, then once you correct them you will need to recalculate the Budget value by pressing the Calculator button adjacent to the Budget field.

Item Cost

The Contractor can use the Item Cost field to calculate gross profits. If the Contractor knows the actual cost of supplying the CSI, such as a Street Light Lamp or Sign, they can run the Claim Analysis report and compare the rates and totals with the actuals. See Claim Analysis Report (on page 457).



This field is private to the Contractor. It is not available to the Network Owner.

Accounting and CSIs

Claim lines can be associated with general ledger account codes for financial analysis and reporting purposes. You add Account codes in **RAMM Contractor** and associate Contract CSIs with them. Once Claims have been accepted, the financial information at Claim line level can then be exported into an external accounting application. Both the Contractor and Network Owner can do this.

Accounting Codes Section

Field Names

The default names of the fields in the Accounting Codes section are Contractor Account Code and Network Owner Account Code. However, these are just names of convenience. The actual names will reflect the values which you typed at the Claim Lines Analysis tab of the **Contract Details** screen.

In the graphic above they are named Contractor Account Code and GL Account 2. They can be used for any general ledger account codes and are not restricted to the Account codes of the Contractor or the Network Owner.

Adding CSIs


Introduction

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.

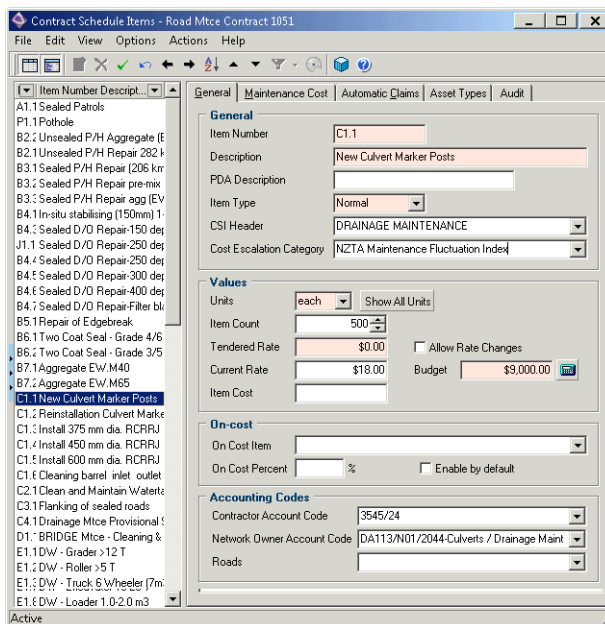
Before you do this you need to have:

- added the Contract Activities. You do this at the **Contract Item Activities** screen. See Activities (on page 79).
- added the Contract Account codes. You do this at the Analysis Account Code tabs at the **Contract Details** screen. See Adding Account Codes (on page 144).
- a copy of the contract to which to refer if necessary.

Menu Path

Follow the menu path (add initial Contract details) > (press Schedule Items ) to open the **Schedule Items** maintenance screen. It will be named using the actual Contract description.

► To Add CSIs



Contract Schedule Items - Road Mtce Contract.1051

File Edit View Options Actions Help

Item Number Description

A1.1 Sealed Patrols
P1.1 Pothole
B2.1 Unsealed P/H Aggregate (E
B2.1 Unsealed P/H Repair 252
B3.1 Sealed P/H Repair (206 km
B3.1 Sealed P/H Repair pre-mix
B3.1 Sealed P/H Repair egg (E
B4.1 Insitu stabilising (150mm) 1
B4.1 Sealed D/O Repair-150 der
J1.1 Sealed D/O Repair-250 der
B4.1 Sealed D/O Repair-250 der
B4.1 Sealed D/O Repair-300 der
B4.1 Sealed D/O Repair-400 der
B4.1 Sealed D/O Repair-Filter bl
B5.1 Repair of Edgebreak
B6.1 Two Coat Seal - Grade 4/6
B6.1 Two Coat Seal - Grade 3/5
B7.1 Aggregate Elw.M40
B7.1 Aggregate Elw.M65
C1.1 New Culvert Marker Posts
C1.2 Reinstallation Culvert Marke
C1.1 Install 375 mm dia. RCRRJ
C1.1 Install 450 mm dia. RCRRJ
C1.1 Install 600 mm dia. RCRRJ
C1.1 Cleaning barrel inlet outlet
C2.1 Clean and Maintain Waterc
C3.1 Flanking of sealed roads
C4.1 Drainage Mtce Provisional
D1.1 BRIDGE Mtce - Cleaning &
E1.1 DW - Grader >12 T
E1.1 DW - Roller >5 T
E1.1 DW - Truck & Wheelbar (7m
E1.1 DW - Loader 1.0-2.0 m3

General Maintenance Cost Automatic Claims Asset Types Audit

General

Item Number C1.1
Description New Culvert Marker Posts
PDA Description
Item Type Normal
CSI Header DRAINAGE MAINTENANCE
Cost Escalation Category NZTA Maintenance Fluctuation Index

Values

Units each Show All Units
Item Count 500
Tendered Rate \$0.00 Allow Rate Changes
Current Rate \$18.00 Budget \$9,000.00
Item Cost

On-cost



On Cost Item
On Cost Percent % Enable by default

Accounting Codes

Contractor Account Code 3545/24
Network Owner Account Code DA113/N01/2044-Culverts / Drainage Maint
Roads

Active

To do this you follow these steps:

- 1 Press CTRL+N or  to add a new CSI record.
- 2 Type, in the **Item Number** and **Description** fields the exact provisions of the contract for this CSI.
- 3 If the legal CSI Description is longer than the **Description** field, use the **Schedule Notes** field for the complete Description as in the contract.
- 4 If the Description is lengthy, type a short and informative alternative for use with **Pocket RAMM** in the **PDA Description** field. Otherwise, leave it blank.
- 5 Select, from the **Item Type** drop-down list, **Normal**, **Dayworks** or **Lump Sum**.
- 6 Select, from the **Activity** drop-down list, the Contract Activity with which this CSI is associated.
- 7 Select, from the **Units** drop-down list the units for this CSI. If the required unit is not available, press **Show All Units** and it will become available.
- 8 Type in the **Item Count** and the **Agreed Rate** fields, the expected number of CSI Claim Lines for this Contract and the rate agreed for each. These values are used to calculate the Budget.
- 9 Place the mouse pointer in the **Budget** field. **RAMM Contractor** will multiply the **Item Count** and the **Agreed Rate** values to calculate a Budget figure which will default.
- 10 If you know the actual cost to you of the CSI, type this value in the **Item Cost** field. You will then be able to run the Claim Analysis report and compare the rates and totals with the actuals to calculate your gross profit.
- 11 Select the **Account** codes for the CSI from the two drop-down lists in the **Accounting Codes** section. The default names of the fields are **Contractor Account Code** and **Network Owner Account Code**. However, the actual names will reflect the values which you typed at the **Claim Lines Analysis** tab of the **Contract Details** screen. In the graphic above they are titled **Contractor Account Code** and **GL Account 2**.
- 12 Press  to save the record.
- 13 If you want to add another CSI, go to step 1. Otherwise, go to **Associating Maintenance Cost Items** (on page 242).

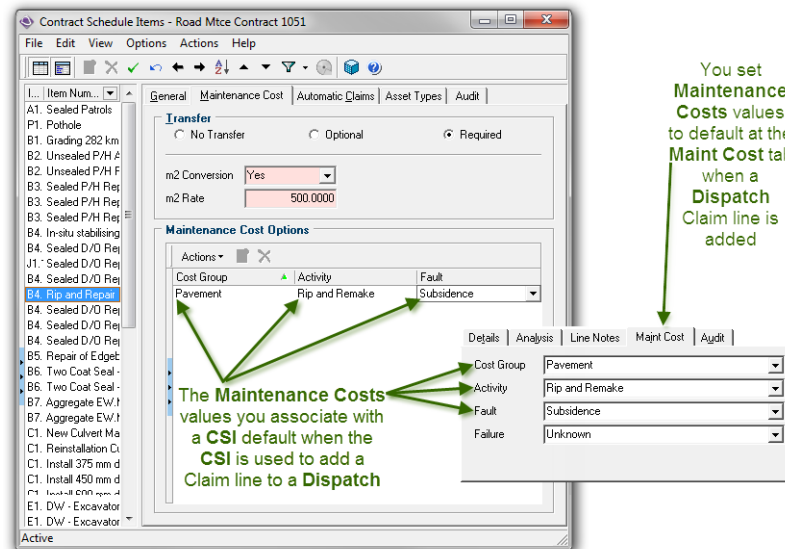
CSI Maintenance Cost

Maintenance Activity is the measure of the actions taken to maintain the Network inventory. Network Owners use Maintenance Activity to compare the how much work was done in different years. They can also be used to compare the maintenance costs from one year to the next. You set up Maintenance Costs in **RAMM Contractor**.

Maintenance Costs and CSIs

Standard industry practice is to associate Maintenance Costs data with CSIs. This associates Maintenance Costs data with individual Dispatch Claim lines.

So when you are adding your CSIs you set up appropriate Maintenance Costs values and parameters at the same time.



The data, which are gathered and grouped in **RAMM Contractor**, are then transferred to **RAMM** Maintenance Costs. There, the user, with or without the assistance of software such as dTIMS, can compare the Maintenance Activities from one year to the next and plan Forward Works.



The Network Owner will require specific combinations of Maintenance Cost Groups, Activities and Faults to be set up for transfer to the **RAMM** Maintenance Cost system. These are the CSIs relating to Pavement, Surfacing, Shoulder or Drainage on all General Maintenance Contracts.

Maintenance Costs Data Transfer

You define whether Maintenance Cost data will be transferred from **RAMM Contractor** to **RAMM** Maintenance Costs.

For each CSI, you select:

- **No Transfer**
No Maintenance Cost data will ever be transferred to the **RAMM** Maintenance Cost system. You use this setting if you do not use **RAMM** Maintenance Costs.
- **Optional**
You will have the option of not transferring Maintenance Cost data from Claim Lines associated with CSIs to the **RAMM** Maintenance Cost system. You use this setting if you want to have this option. This is not recommended.
- **Required**
All Maintenance Cost data from Claim Lines associated with CSIs will be transferred to the **RAMM** Maintenance Cost system. You should use this setting.

Transferring Maintenance Costs

Once a Claim has been completed the Maintenance Costs data need to be transferred to the **RAMM** Maintenance Cost system. See Sending Claim Information to **RAMM** Maintenance Costs (on page 434).



Please note that the **Optional** and **Required** options relate to the transfer of Maintenance Cost data to **RAMM**, not to whether the Maintenance Cost fields in **Pocket RAMM** and **RAMM Contractor** are optional or mandatory.

m2 Conversion and Rate

If you follow the industry standard, you will convert Maintenance Costs data to m² for comparison purposes. You would then select **Yes** from the **m2 Conversion** drop-down list. You would then enter the rate in the **m2 Rate** field. Otherwise you would accept the default **No**.

See **Convert to m2 for Comparison** (on page 75).



The **m2 Conversion** drop-down list and the **m2 Rate** field do not become available unless **Optional** or **Required** has been selected in the **Transfer** section.

Cost Groups, Activities and Faults

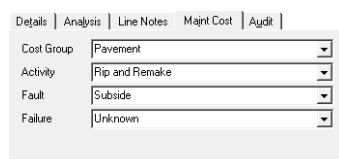
If you have selected **Optional** or **Required** in the **Transfer** section and then saved your settings, the **Maintenance Cost Options** panel becomes available. It is there that you associate the **Activity**, **Cost Group** and **Fault** values with the **CSI**.

See Maintenance Activity Lookups (on page 78).

Dispatch Claim Line Maint Cost Section

When you add an Estimate or Claim Line to a Dispatch, if you have associated a single set of Maintenance Costs values with the CSI used for the Claim line, those values will default into the fields on the Maint Cost tab as below.

If you have associated more than one set of Maintenance Costs values with the CSI, then you manually select values from the Cost Group, Activity and Fault drop-down lists to match the actual work done in the field.



Field	Selected Value
Cost Group	Pavement
Activity	Rip and Remake
Fault	Subside
Failure	Unknown


Associating Maintenance Cost Items

You set up Maintenance Cost items and associate them with CSIs (Contract Schedule Items). When the resulting Claim Line data is transferred to **RAMM**, the Network Owner uses the data for Maintenance Costs comparison purposes.

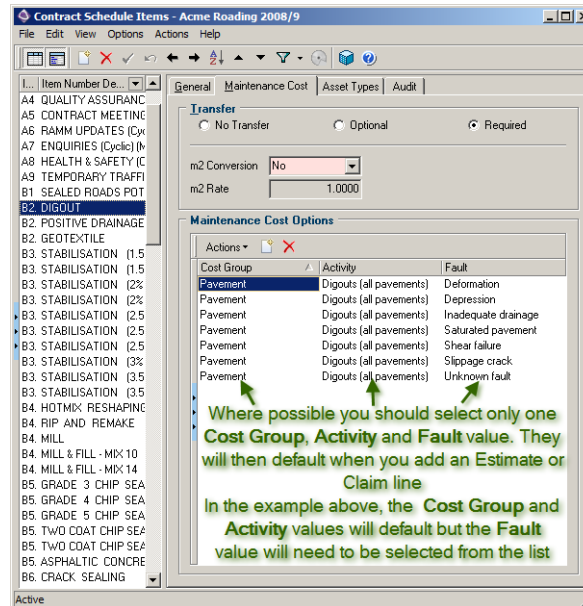
Before you do this you need to have:

- added the CSIs. You do this at the **Contract Schedule Item** maintenance screen. See Adding CSIs (on page 238).
- calculated your user-defined m² conversion ratios (if you use them).
- added the Cost Groups at the **Cost Group** screen. See Cost Groups (on page 78).
- added Contract Activities at the **Activities** screen. See Activities (on page 79).
- added the Contract Faults. You do this at the **Fault** screen. See Faults (on page 80).
- added the Contract Account codes. You do this at the Analysis Account Code tabs at the **Contract Details** screen. See Adding Account Codes (on page 144).

Menu Path

- Follow the menu path (add initial Contract details) > (press Schedule Items ) > (press Maintenance Cost) to open the **Maintenance Cost** tab of the **Contract Schedule Item** screen. It will be named using the actual Contract description.

► To Associate Maintenance Cost Items




To do this you follow these steps:

- 1 Select, in the (unnamed) Item list panel on the left, the CSI with which you want to associate Maintenance Cost Items.
- 2 In the Transfer section, select the Required option unless you have a very good reason for choosing one of the others.
The m² Conversion drop-down list will become available.
- 3 Do you intend to use the m² conversion system for cost comparison purposes?

Yes	go to step 5
No	go to step 8

- 4 Select Yes from the m² Conversion drop-down list.
- 5 Type the user-defined rate in the m² Rate field.
- 6 Go to step 9.
- 7 Accept the default No in the m² Conversion drop-down list.
- 8 Press .
Your changes will be saved. The lower Maintenance Cost Options section will become available.
- 9 Press in the lower Maintenance Cost Options section.
- 10 Double-click in the white space below the Cost Group column heading.
The Cost Group drop-down list will become available.
- 11 Select, from the Cost Group drop-down list the Cost Group with which this CSI will be associated.

- 12 Double-click in the white space below the **Activity** column heading.
The **Activity** drop-down list will become available. The **Activities** which you have associated with the **Cost Group** will be available from the drop-down list.
- 13 Select the appropriate **Activity**.
- 14 Double-click in the white space below the **Fault** column heading.
The **Fault** drop-down list will become available. The **Faults** which you have associated with the **Cost Group** will be available from the drop-down list.
- 15 Select, from the **Fault** drop-down list, the **Fault** which you want to associate with the **Activity** chosen.
- 16 Press .
The record will be saved.
- 17 Do you want to add another **Cost Group**, **Activity** and **Fault** combination?

Yes	go to step 9.
No	go to step 18.

- 18 Go to Restricting CSIs by Asset Type (on page 245).

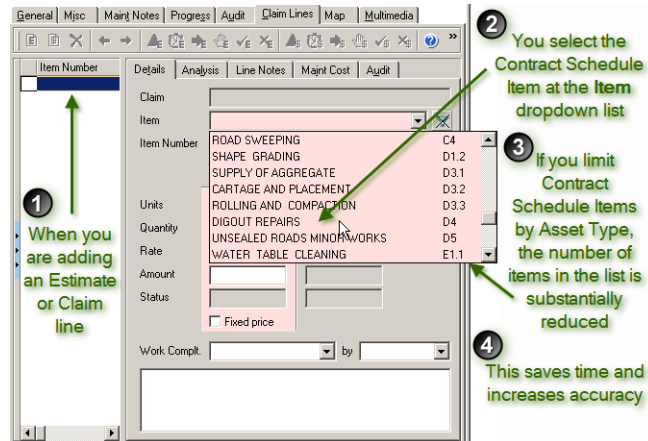
CSI Asset Types

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.

You select a **Schedule Item** for each Estimate or Claim line during the Dispatch maintenance process. You do this at the **Item** drop-down list on the **Details** tab of the Claims tab of the **Dispatch** maintenance screen.

Many Contracts have a very large number of CSIs. If you do not restrict the CSIs to particular Asset Types, then **Pocket RAMM** and **RAMM Contractor** users will have to scroll through every CSI at the **Item** drop-down list in order to find the one they need for the Estimate or Claim line.

Restricting CSIs to named Asset Types will save time and increase accuracy.



You can only restrict by Asset Type, CSIs of Item Type of Normal or Dayworks. Those of Item Type of Lump Sum do not need to be restricted.

NOTE

Restricting CSIs by Asset Type


Introduction

You set up CSIs to associate with Dispatch Estimate or Claim lines to reflect the contract provisions. If you have a large number of CSIs you should restrict them by Asset Type to save time and increase accuracy for **Pocket RAMM** and **RAMM Contractor** users.

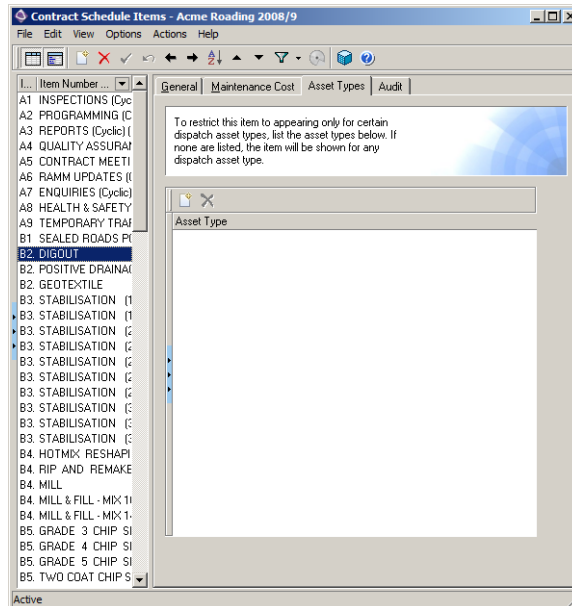
Before you do this you need to have:

- added the CSIs. You do this at the **Contract Schedule Item** maintenance screen. See Adding CSIs (on page 238).
- a copy of the contract to which to refer if necessary.

Menu Path

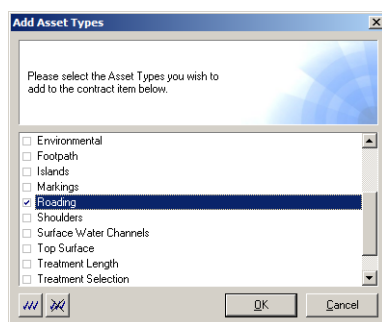
- Follow the menu path (add initial Contract details) > (press Schedule Items ) > (press Asset Types) to open the Asset Types tab of the **Contract Schedule Items** screen. It will be named using the actual Contract description.

► To Restrict CSIs by Asset Type




To do this you follow these steps:

- 1 Select, in the (unnamed) Contract Schedule Item list panel on the left, the CSI you want restrict by Asset Types.
- 2 Press CTRL+N or . The **Add Asset Types** screen will open.



- 3 Select the check boxes adjacent to the Asset Types for which you want the CSI to be available.
- 4 If you want to select all Asset Types, press . If you want to clear all the check boxes and start again, press .

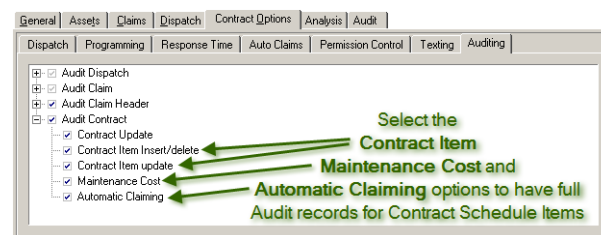
- 5 Press . The **Add Asset Types** screen will close and you will be returned to the **Contract Schedule Items** screen with the selected Asset Types defaulted into the Asset Type list panel.
- 6 If you want to restrict another CSI by Asset Type, go to step 1. Otherwise, go to Viewing CSI Audit Records (on page 247).

CSI Audit

You add CSIs to the exact specifications of the contract with the Network Owner. You do this prior to activating the Contract in **RAMM Contractor**. If there are any changes to the CSIs after the Contract has been opened this is potentially very serious if they are not matched by analogous changes to the contract. So you will want to keep an audit trail of any changes made.

Configure the Records Kept

You select options at the Auditing tab on the Contract Options tab of the **Contract Details** screen to determine which audit records will be kept.



Viewing CSI Audit Records

Introduction


You set up CSIs to exactly match the contract provisions. If a CSI is changed after the Contract in **RAMM Contractor** has been opened you will want an audit record of this change. If you activate auditing at the Auditing tab on the Contract Options tab of the **Contract Details** screen before you add CSIs you will have a record of who added the CSI and any subsequent changes.

Before you do this you need to have:

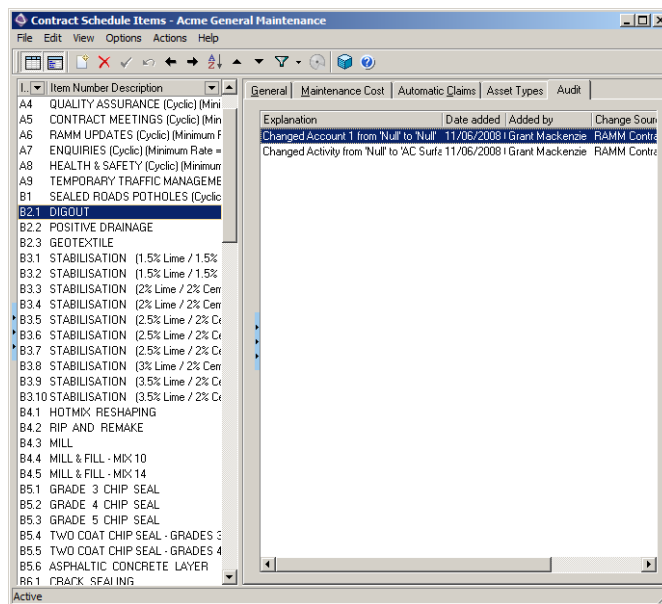
- added the initial Contract details. You do this at the General tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).

- activated auditing for CSIs. You do this at the Auditing tab on the Contract Options tab of the **Contract Details** screen. See Setting Audit Record Options (on page 202).
- added the CSIs. You do this at the **Contract Schedule Item** maintenance screen. See Adding CSIs (on page 238).
- a copy of the contract to which to refer if necessary.

Menu Path

- Follow the menu path (add initial Contract details) > (press Schedule Items ) > (press Audit) to open the Audit tab of the **Contract Schedule Items** screen. It will be named using the actual Contract description.

► To View CSI Audit Records



To do this you follow these steps:

- 1 Select the CSI whose audit records you wish to view.
- 2 View the audit records.
- 3 If you want to view audit records for another CSI go to step 1. Otherwise, close the screen in the normal manner.

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**.

On-cost is usually enabled when the Contract is being set up. You do this at the Claim Options tab of the **Contract Details** screen.

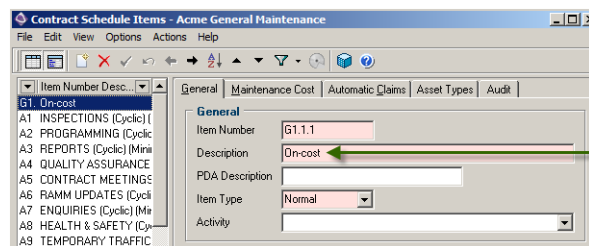
See Enable On-cost (on page 228).

On-cost Schedule Item

Where On-cost has been agreed between the Contractor and the Network Owner and enabled in the Contract you need to set a Contract Schedule Item named On-cost, or the term used for this in your contract. This is the item which will appear in its own Claim line at the Claim Lines tab on the **Dispatch** screen.

This is the Claim line used to identify the On-cost for Claim purposes.

You add a CSI named On-cost and select it as the item against which to record On-cost at the **Contract Schedule Items** screen. See Setting up On-cost (on page 256).



You set up a Contract Schedule Item named On-cost or the name by which it is called in your contract

On-cost and Contract Schedule Items

When On-cost has been enabled, the On-cost section becomes available on the General tab of the **Contract Schedule Items** screen.

On-cost	
On Cost Item	On Cost
On Cost Percent	10.00 % <input checked="" type="checkbox"/> Enable by default

On Cost Percent

When you define an On-cost percentage, this is the percentage which will be applied to the cost of the Contract Schedule Item in the Claim line.

A separate Claim line will be added to Claims which include the CSI. In the example below, when the Grade 3 Chip Seal Claim line was saved, the On-cost Claim line was added automatically. It is for ten percent of the cost of the Grade 3 Chip Seal Claim line.

It is unable to be entered or edited.

The On-cost Claim line was created when the second Claim line was saved as On-cost was set to Enable by default

The On-cost Claim line has the name you gave it to identify it as On-cost

The On-cost Claim line is unable to be entered or edited

Enable by Default

Normally you would select the Enable by default option so that the agreed On-cost will be automatically applied.

If you do not select this option, then the On-cost check box on the Details tab of the Claim Lines tab of the **Dispatch** maintenance screen will not be selected by default. You have the option to select it.

If you select the Enable by Default option, then the On-cost check box will be selected by default for Claim and Estimate lines for the Schedule Item

Otherwise it will be cleared

You can override this

On-cost Analysis

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**.

RAMM Contractor allows for multiple On-cost contract variations. This enables you to set multiple On-cost items and associate Account codes with the On-cost items.

Enable On-cost

You can perform much of the CSI On-cost set up whether or not you have turned on On-cost for the Contract. The On-cost functions will not work until you have selected the Enable On-cost option at the Claim Options tab of the Claims tab of the **Contract Details** screen.

CSI Headers | Claim Options

General

Days til Payment: 20 days

Maintenance Cost List: Schedule Item

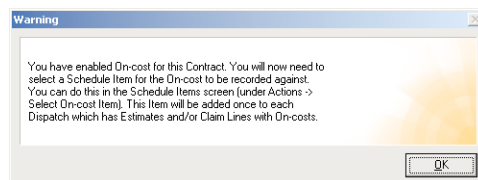
☒ Require Maintenance Cost values on Claim Line if required on schedule item

☒ Use default rates when transferring claims to Maintenance Cost

Tick this and the actual costs of each claim line will not be transferred to the Maintenance Costs system. Default rates within Maintenance Cost will be used instead

☒ Enable On-cost

When you save your changes after enabling On-cost, you are prompted to select an item to be used as the Contract On-cost item. This becomes the default for the Contract.



Multiple On-cost Items

You can now create multiple On-cost items to associate with CSIs.

You add the Item Number and the Description as per the amendment to the contract. You select the Item Type of On-cost.

You can now associate this On-cost item with the appropriate Account codes. When you add a Claim line for a CSI associated with this On-cost item, the Account codes for the CSI Claim line will come from the CSI record. The Account codes for the associated On-cost Claim line will be the ones you select at the screen below.

The screenshot shows the 'General' tab of the RAMM Contractor software interface. The form is divided into several sections:

- General:**
 - Item Number: 9.7
 - Description: On-cost for Detector Loops
 - PDA Description: Loop On-cost
 - Item Type: On-cost
 - CSI Header: Detector Loops
- Values:**
 - Units: m
 - Item Count: 1
 - Agreed Rate: 1
 - Item Cost: 1
 - Budget: \$0.00
 - Allow Rate Changes: ☒
- Accounting Codes:**
 - Acme Contractors: XTR 234 1234 77
 - Hill Valley Council: DNC 123 4567 89
- Schedule Notes:** (Empty text area)

Green arrows point to the following fields with text:

- Item Number: Add the Item Number and
- Description: Description as per the contract
- Item Type: Select the Item Type of On-cost
- Units, Item Count, Agreed Rate, Item Cost, Budget: Select any values you like for these fields as they will have no effect
- Accounting Codes: Accounting codes you associate with this item will apply to the On-cost Claim line only

Associate On-cost with CSIs

When you have created your On-cost item, you associate it with the CSIs to which it will be applied. The item will be available at the On Cost Item drop-down list. You define, in the On Cost Percent field, the percentage to be applied to Claim lines for this CSI. You then have the option to select the Enable by default option. This sets the On-cost option for the Claim line to selected. If the user leaves the option selected, an On-cost Claim line will be created when the CSI Claim line is saved. The user can clear the On-cost option before saving the Claim line. In this case the On-cost Claim line will not be created when the CSI Claim line is saved.

If the Enable by Default option is not selected, the On-cost option for Claim lines will not be selected by default. The user can still select it for Claim lines using the CSI.

The screenshot shows the 'General' tab of the CSI form. The 'On-cost' section contains the following fields and annotations:

- On Cost Item:** A dropdown menu set to 'On-Cost for Detector Loops'. Annotation: "You select the appropriate On-cost Item from the drop-down list".
- On Cost Percent:** A text field set to '10.00 %'. Annotation: "You set the On-cost Percentage to be used".
- Enable by default:** A checked checkbox. Annotation: "If you select the Enable by default option, then when adding Claim lines for this CSI the On-cost option will be selected by default".
- Accounting Codes:** Two dropdown menus. The first is set to 'XTR 234 1234 76' and the second to 'DNC 123 4567 88'. Annotation: "Account codes you associate with Normal CSIs are associated with Claim lines for the CSIs".

Other fields in the form include: Item Number (38.3), Description (Dynamic 1 Lane loop (S & I)), PDA Description, Item Type (Normal), CSI Header (Detector Loops), Units (each), Item Count (2), Agreed Rate (\$364.14), Item Cost, and Budget (\$728.28).

On-cost Claim Lines

When you add a Dispatch Claim line for a CSI which has been associated with an On-cost item, the user has the option to automatically add an On-cost Claim line. This On-cost Claim line will be the percentage of the value of the Claim line which was set at the On Cost Percent field.

If the On-cost option is selected when the Claim line is saved, the On-cost Claim line will be created as part of the Save process. The On-cost option will be selected by default if the Enable by default option was selected when the On-cost item was associated with the CSI.

Whether or not the Enable by default option was selected, the user can select or clear the On-cost option when adding a Claim line and so control whether an On-cost Claim line will be created.

The screenshot shows the 'Claim Lines' form. The 'Details' tab is active, showing the following fields and annotations:

- Item Number:** A dropdown menu set to 'General Fill Materials'. Annotation: "On-cost Claim lines are created automatically when their associated Claim line is saved".
- Item:** A dropdown menu set to 'General Fill Materials'.
- Item Number:** A text field set to '6.7'.
- Units:** A dropdown menu set to 'FS'.
- Quantity:** A text field set to '1'.
- Rate:** A text field set to '\$538.50'.
- Amount:** A text field set to '\$538.50'.
- Status:** A dropdown menu set to 'Open'.
- On-cost:** A checked checkbox. Annotation: "If the Enable by default option is selected when the CSI is associated with an On-cost item, the On-cost option at the Details tab of the Claim Lines tab is selected by default when a Claim line is added for the CSI".

Other fields in the form include: Claim Number (October 2009 (35)), Estimate, Claim, Fixed price, Est Total (\$0.00), and Claim Total (\$1313.68).

On-cost Claim Lines Available in Pocket RAMM

The On-cost Claim lines which will be available in **Pocket RAMM** are those which you have associated with CSIs in **RAMM Contractor**.

The CSIs (Contract Schedule Items) in **RAMM Contractor**

And the associated On-cost items

Become available in **Pocket RAMM**

The On-cost Claim lines are allocated to the Account codes with which they are associated

These On-cost items become available to be applied in **Pocket RAMM**.

Item	Qty
Dynamic 1 Lane loop (S & I)	1
Loop On-cost	1

When a Claim line using a CSI which has an associated On-cost Claim line is added

The On-cost Claim line can be added automatically

On-cost in Pocket RAMM

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**.

If multiple On-cost contract variations are set up in **RAMM Contractor** these can be used in **Pocket RAMM** to apply a variety of On-cost items. The On-cost items can be associated with appropriate Account codes.

For **RAMM Contractor** set up details see On-cost Analysis (on page 251).

The screenshot shows the 'Job Detail' window with the following fields:

Contract	Hill Valley Traffic Signals 12
Call Type	Maintenance Contractor
Fault	Loop Not Working
Address	LAKE RD - ONEWA AC
Notes	
Assigned to	Anyone
Priority	24 Hours

On-cost will be available only for the Contracts in which you have set up the On-cost Claim lines

On-cost Claim Lines Automatically Add

You have options to determine whether the On-cost Claim lines will be automatically added in **Pocket RAMM** when their associated Claim line is added.

You do this at the On-cost section of the General tab of the Contract Schedule Item screen in **RAMM Contractor**.

Enable by Default Option

There is an Enable by default option.

The screenshot shows the 'On-cost' section with the following fields:

On Cost Item	On-Cost for Detector Loops
On Cost Percent	10.00 %
	<input checked="" type="checkbox"/> Enable by default

Select the **Enable by default** option if you want On-cost Claim lines to be added automatically in **Pocket RAMM**

Pocket RAMM

If you have selected the On-cost Enable by default option in **RAMM Contractor**, then when you add a Claim line using the particular CSI, the On-cost option will be selected by default.

The screenshot shows the 'Claim Detail' window with the following fields:

Claim	October 2009
Item	Dynamic 1 Lane Loop (S & D)
Item No	3.8.3
Unit	each
Quantity	1
Rate	\$364.14
Amount	\$364.14
Status	Open
	<input checked="" type="checkbox"/> On-cost

When you select a CSI with an associated On-cost item

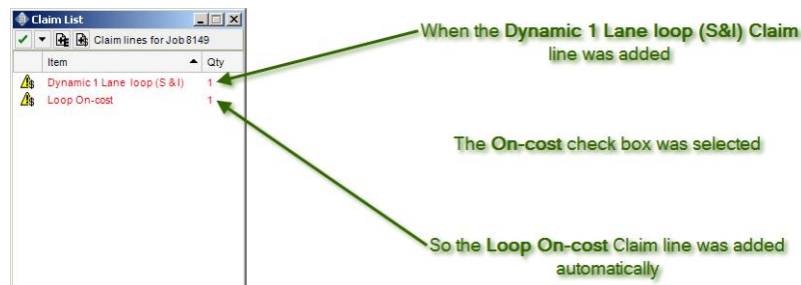
On-cost will be selected by default if the **Enable by default** option was selected

An On-cost Claim line will then be added automatically to the Job

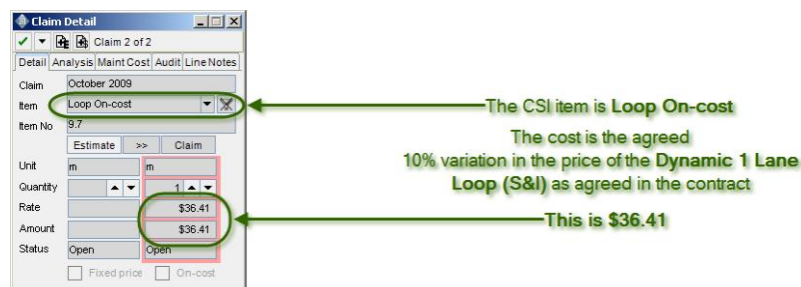
If the **Pocket RAMM** operator clears the check box no On-cost Claim line will be added.

On-cost Claim Lines

The On-cost Claim line is added automatically. In the example below this is the Loop On-cost Claim line.



The details of the Claim line show that the Amount of the On-cost Claim line is the additional 10% as agreed in the contract. This figure is \$36.41 in the example below.



Setting Up On-cost

Introduction


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**.

Before you do this you need to have:

- added the CSIs. You do this at the **Contract Schedule Items** screen. See Adding CSIs (on page 238).

- enabled On-cost. You do this at the Claim Options tab of the **Contract Details** screen. See Enable On-cost (on page 228).
- a copy of the contract to which to refer if necessary.

Menu Path

- Follow the menu path (add initial Contract details) > (press Schedule Items ) to open the **Contract Schedule Items** maintenance screen. Its name includes the Contract description.


► To Set Up On-cost


The Item Number and Description values should match the contract provisions

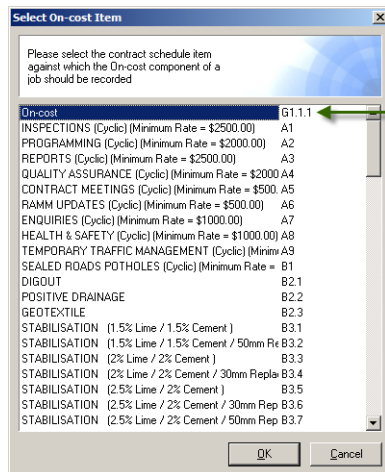
On-cost has been used in this example

Use the values in the graphic for the mandatory fields. They will have no effect


To do this you follow these steps:

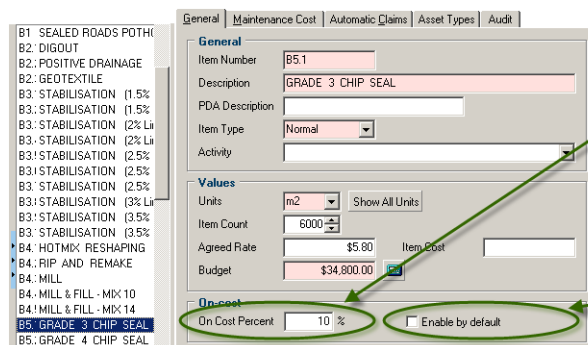
- 1 Press CTRL+N or  to add a new CSI record.
- 2 Type, in the Item Number and Description fields the exact provisions of the contract for this CSI. In the example above the Item Number is in its own group to distinguish On-cost from all other groupings. The Description On-cost has been used as this matches the contract provisions.
- 3 If the legal CSI Description is longer than the Description field, use the Schedule Notes field for the complete Description as in the contract.
- 4 If the Description is lengthy, type a short and informative alternative for use with **Pocket RAMM** in the PDA Description field. Otherwise, leave it blank.
- 5 Accept the default Normal at the Item Type drop-down list.
- 6 Accept the default m at the Units drop-down list. This value will have no effect.
- 7 Type 0 in the Budget field. This value will have no effect.
- 8 Leave the other fields empty.

- 9 Press  to save the On-cost CSI record.
- 10 Follow the menu path **Actions > Select On-cost Item**.
The **Select On-cost Item** dialog will open.




Select the
On-cost Schedule
Item you have just
added

- 11 Select the On-cost CSI you have just added.
- 12 Press .
The **Select On-cost Item** dialog will close and you will be returned to the **Contract Schedule Item** maintenance screen.
- 13 Select a CSI for which On-cost has been agreed between the Contractor and the Network Owner. In the example below it is B5 GRADE 3 CHIP SEAL.



Type the On-cost
percentage increase
for the selected
Schedule Item in the
On Cost Percent
field

If you want On-cost to
be applied by default
to all Claim lines for
this Schedule Item,
select the **Enable by Default**
option

- 14 In the On-cost section, type the agreed percentage in the On Cost Percent field.
- 15 If you want an On-cost Claim line to be generated by default whenever a Claim line for the CSI is added, select the **Enable by default** option.
- 16 Press  to save the record.
- 17 If you want to set up another CSI for On-cost, go to step 13. Otherwise, close the screen in the normal manner to be returned to the **Contract Details** screen.

Auto Claiming for CSIs

Once you have defined your CSIs and associated the appropriate Maintenance Cost items with them, you can set up Auto Claiming if required.

This automates the process of generating Claim and Estimate lines when a Job or Dispatch is Completed. This is particularly useful for field crews using **Pocket RAMM**. Once the work has been completed, the Job can be closed and the Claim or Estimate lines generated automatically without the field crew needing to be familiar with the Claim and Estimation process.

Auto Claiming is different for Signs, Street Lights and Traffic Signals than for other Asset Types.

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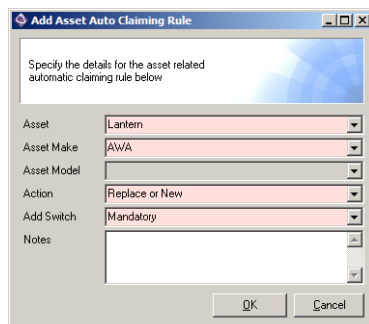
Introduction to Auto Claiming

Auto Claiming makes the Claim and Estimation process efficient and accurate.

Fully Automated - Mandatory

You can make the generation of Claim and Estimation lines automatic at the moment the Job or Dispatch is completed. You do this when setting up Auto Claiming for Assets or combinations of Asset Type, Fault and Priority, by selecting **Mandatory** at the Add Switch drop-down list on the **Add Asset Auto Claiming Rule** dialog or at the Add Claim dialog in the Options section of the **Automatic Claiming Setup Wizard**.

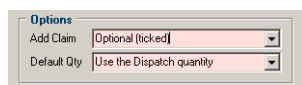
Then, when the Job or Dispatch is Completed, the Claim or Estimate Lines will be generated with no input from the user.



User Input Required - Optional (Selected or Not Selected)

If you want **Pocket RAMM** and **RAMM Contractor** users to be able to specify CSIs for which Claim or Estimate lines should be generated at the moment the Job or Dispatch is completed. You do this by selecting **Optional (ticked)** or **Optional (unticked)** at the Add Switch drop-down list on the **Add Asset Auto Claiming Rule** dialog or at the Add Claim dialog in the Options section of the **Automatic Claiming Setup Wizard**. Then, when the Job or Dispatch is Completed, a list of CSIs will appear. They will be selected by default if the **Optional (ticked)** value was chosen. They will not be selected if the **Optional (unticked)** value was chosen.

The user is then presented with only those CSIs which directly relate to the Job or Dispatch. The CSIs are already selected or cleared dependent upon the likelihood of their use.



Auto Claiming and Different Asset Types

Automatic Claims allows you to automate the process of generating Claim Lines when a Job is completed or an Asset is replaced.

Asset-related Auto Claiming is set up for Street Lights, Signs and Traffic Signals at the Automatic Claims tab of the **Contract Schedule Items** screen. Auto Claiming for all other Assets is set up using the **Auto Claiming Wizard**.



Claim and Estimate lines generated using Auto Claiming are not automatically presented to the Network Owner. They become available for the Contract Manager approval process.

Replacement and Job Completed

There are two ways to set up Automatic Claiming. You can set it up so that Estimate or Claim Lines are automatically created on:

- Asset Replacement
- Dispatch Completion.

Asset Related Charges

You use this when the Claim is linked to a physical Asset. Replacing a Street Light is a good example.

Presently, Asset Related Charges can be used only for Street Lights, Traffic Signals and Signs. See Defining Asset Related Charges (on page 264).

Non Asset Related Charges

You use this when the Claim is for an administrative activity, or similar, rather than a physical Asset. A good example is **Pocket RAMM** training or the charge for a Field Supervisor.

You set up Non Asset Related Charges using the **Auto Claiming Wizard**. See Using the Auto Claiming Wizard (on page 271).



These two options are mutually exclusive. You can not add Asset related charges and Non Asset related charges for the same CSI.

Asset Related Charge Overrides

You use Asset-related Charge Overrides to substitute one Claim line in place of a number of Claim lines. See Asset Related Charge Overrides (on page 266).

Efficient and Accurate

Automating the Estimation and Claims system is efficient and accurate. It can be particularly useful for field crews using **Pocket RAMM**, as the work and the Dispatch can be completed with the Estimate/Claim lines generated automatically without the need for the field crew to be familiar with the Claims process.

Enable Automatic Claiming

General Assets Claims Dispatch Contract Options Analysis Audit

Dispatch Programming Response Time Auto Claims Permission Control Texting Auditing

☒ Enable Auto Claiming in RAMM Contractor

☒ Enable Auto Claiming in Pocket RAMM

Select these two options if you want to use Auto Claiming

You need to select one or both of the Contract Auto Claims options at the Auto Claims tab of the **Contract Details** screen before you can enable Automatic Claiming. See Enabling Auto Claiming and Estimating (on page 194).



Auto Claiming for Asset Related Charges works in **Pocket RAMM** but not in **RAMM Contractor**. So Claim lines will be created for Traffic Signals, Signs and Street Lights Jobs which are Completed in **Pocket RAMM** but not if Completed in **RAMM Contractor**.

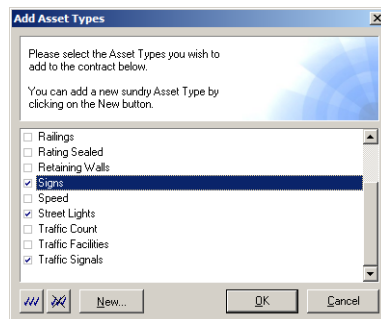
Asset Replacement

There is a group of three Asset Types in **RAMM** for which the CSIs are fundamentally different from the others. They are:

- Signs
- Street Lights
- Traffic Signals.

A maintenance Contract for these Assets would involve actual Asset replacement. So, for instance, for a Street Light Contract you would replace or remove Lamps, Gear and Lights. This is quite different from maintaining Pavement which involves Digouts, Hot Mix, Road Sweeping and other amelioration activities.

Add Asset Types Screen



Asset Related Auto Claiming Rules

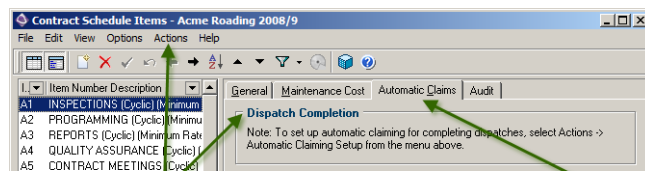
An Asset Related Charge is an Automatic Claiming rule for Asset replacements for Signs, Street Lights and Traffic Signals. You define Asset Related Charges at the Automatic Claims tab on the **Schedule Items** screen.

Automatic Claims Tab

The Automatic Claims tab will be available only if you have selected at least one of the following Asset types for the Contract:

- Signs
- Street Lights
- Traffic Signals.

They are the only Asset Types for which the Replace set of Rules can be created.



You follow the menu path **Actions > Automatic Claiming Setup** to open the Wizard and set up Automatic Claiming for Asset Types other than Signs, Street Lights and Traffic Signals

The **Automatic Claims** tab will not appear unless Signs, Street Lights or Traffic Signals are Asset Types for the Contract

Defining Asset Related Charges

You set up Auto Claiming to automate the process of generating Claim and Estimate lines when a Job or Dispatch is Completed. You can define Asset Related Charges for only Signs, Street Lights and Traffic Signals.




To set up charges not related to the above Asset Types you use the **Auto Claiming Wizard**. See Using the Auto Claiming Wizard (on page 271).

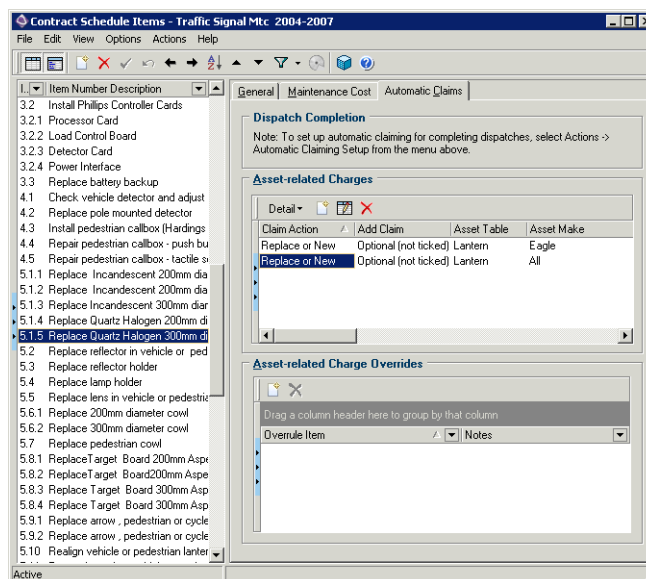
Before you do this you need to have:

- added the CSIs. You do this at the **Contract Schedule Items** screen. See Adding CSIs (on page 238).


Menu Path

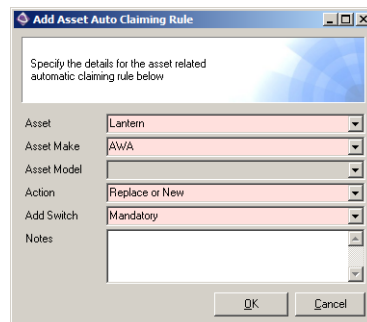
Follow the menu path (add initial Contract details) > (press Schedule Items ) > (press Automatic Claims) to open the **Automatic Claims** tab of the **Contract Schedule Items** screen. It will be named using the actual Contract description.

► To Define Asset Related Charges




To do this you follow these steps:

- 1 Select, in the **Item Number Description** panel, the CSI for which you want to set up Auto Claiming.
- 2 Press CTRL+N or  in the **Asset-related Charges** section to add a new Asset-related claiming rule.
The **Add Asset Auto Claiming Rule** dialog will open.



- 3 Select the relevant values from the **Asset**, **Asset Make**, **Asset Model** (if available) and **Action** drop-down lists.
- 4 The value you select from the **Add Switch** drop-down list affects whether the Auto Claiming Rule is automatically applied when the Job or Dispatch is closed. If you select **Mandatory**, the Claim and Estimate lines are automatically generated. If you select one of the **Optional** values, then when the Job or Dispatch is closed, a dialog opens and the operator is asked to select whether a line should be entered for the CSI. You would do this if, say, when replacing a lamp, a clip or other attachment aid may or may not be used.

Normally you would select **Mandatory**.

- 5 Add useful information in the **Notes** field. 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.
- 6 Press  to save the record which then appears in the list in the **Asset-related Charges** panel.



Auto Claiming for Asset Related Charges works in **Pocket RAMM** but not in **RAMM Contractor**. So Claim lines will be created for Traffic Signals, Signs and Street Lights Jobs which are Completed in **Pocket RAMM** but not if Completed in **RAMM Contractor**.

Asset Related Charge Overrides

You use Asset Related Charge Overrides when you need to substitute one Claim line for a number of Claim lines. There are two situations where this can be useful. When several items can each be charged for as its own Claim line:

- 1 or combined into one Claim line for the group or kit set
- 2 but can also be included as a component part of another CSI.

**NOTE**

Asset Related Charge Overrides can be set up only for Contracts for the Stock Asset Types, Signs, Street Lights and Traffic Signals.

Groups or Kit Sets – Replacement of Lantern and Target Board Together

If you have a Traffic Light Maintenance Contract, you would set up separate CSIs each for Lanterns and Target Boards. However, if you are able to combine the replacement of them both for a lower price, you would add a third CSI and name it Lantern and Target Board, or similar, with the Lantern and Target Board CSIs as overrides.

Items which Are Components of Another Item – Replacement of Light

You can replace the Lamp for a Street Light. You can replace the Gear for a Street Light. But when you replace the Light for a Street Light, this includes the replacement of the Gear and the Lamp.

So you need to have three CSIs to cover each situation. But when you add the Light CSI and set it up for Auto Claiming, you need to have the Gear, the Lamp and the Light itself included as Overrides.

Defining an Asset Related Charge Override

You use Asset Related Charge Overrides when you need to substitute one Claim line in place of a number of Claim lines.

In the example below, the Light GL500 70w HPS Luminaire Transit includes the 70w SON Lamp Transit Lamp and the Gear 70w SON GL500 Transit Gear. So when the Light is replaced, Overrides are needed for the constituent parts. You also define the Light itself as an Override Item.



Asset Related Charge Overrides can be set up only for Contracts for the Stock Asset Types, Signs, Street Lights and Traffic Signals.

NOTE

Before you do this you need to have:

- added the CSIs. You do this at the **Contract Schedule Item** maintenance screen. See Adding CSIs (on page 238).
- defined the Asset Related Charges for each of the items which are to be overridden. You do this at the Automatic Claims tab of the **Contract Schedule Item** maintenance screen. See Defining Asset Related Charges (on page 264).
- a copy of the contract to which to refer if necessary.

Menu Path

Follow the menu path (add initial Contract details) > (press Schedule Items) > (press Automatic Claims) to open the Automatic Claims tab of the **Contract Schedule Item** screen. It will be named using the actual Contract description.



► To Define an Asset Related Charge Override

This new rule governs the replacement of the GL500 Light

These item Charges, Lamp, Light and Gear, will be overridden

The item, in this case the Light which includes the other items, must be defined as an Asset-related Charge Override

To do this you follow these steps:

- 1 Select, in the **Item Number Description** panel, the CSI for which you want to define Asset Related Charge Overrides.
The **Claim Actions** for the CSI will default into the **Asset-related Charges** section.
- 2 Select the **Claim Action** for which you want to define Asset Related Charge Overrides.
- 3 Press  in the **Asset-related Charge Overrides** section to make the panel available.
- 4 Select from the **Override Item** drop-down list, the item to be overruled when the action defined in the **Asset-related Charges** section above is taken.
- 5 Press  to save the record.
- 6 If you need to add more Override Items, go to step three. Otherwise, close the screen.



Auto Claiming for Asset Related Charges works in **Pocket RAMM** but not in **RAMM Contractor**. So Claim lines will be created for Traffic Signals, Signs and Street Lights Jobs which are Completed in **Pocket RAMM** but not if Completed in **RAMM Contractor**.

Standard Auto Claiming

Most Auto Claiming does not involve the replacement of a specific Asset as with Street Lights, Signs and Traffic Signals. Digging a pothole or painting a Road Marking is not replacing one Asset with another which needs to be tracked.

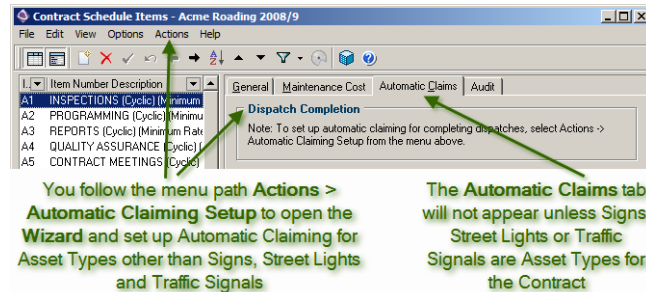
So standard Auto Claiming is used for all Assets other than the three mentioned above.

Auto Claiming Wizard

Auto Claiming for all other Assets is set up using the **Auto Claiming Wizard**. You access the Wizard, not from the Automatic Claims tab but from the menu path Actions > Automatic Claiming Setup at the **Contract Schedule Items** screen.

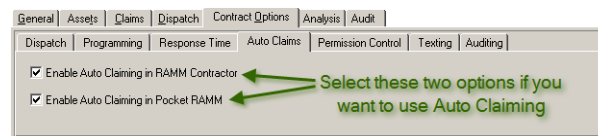
Automatic Claims Tab

The Automatic Claims tab is not available unless you have selected Signs, Traffic Signals or Street Lights as Asset Types for your Contract. You can use the Auto Claiming Wizard whether or not the tab is available.



Auto Claiming Activation

Automatic Claiming will not be operative until one or both of the **Enable Auto Claims** options on the **Contract Details** screen have been selected. If you have not opened the Contract you can select these options at any time. If the Contract has been opened, you should not select these options until your set up is complete.



If the Contract is already Open when you are setting up Automatic Claiming you should not enable the Contract Auto Claims Options until you have completed set up. Otherwise your changes will be live as soon as you press the Save button.

Auto Claiming Rules

At the Auto Claiming Setup Wizard, you define the Rules which govern the Auto Claiming behaviour when a Job or a Dispatch is completed.

Contract

First you select the Contract for which you want to set Auto Claiming Rules. These Rules apply to a specific Contract. They do not apply to all Contracts for a database.

Asset Type

Generally, the first choice you make is the **Asset Type**. You do this to limit the application of the **Rule** to a Jobs and Dispatches for a certain **Asset Type** only.

Selecting an **Asset Type** does not filter the CSIs list in the **Schedule Items** section.

Fault

If you select an **Asset Type**, you have the option of limiting the **Rule** to only Jobs and Dispatches for a certain **Fault**.

You would use this to simplify Job completion for **Pocket RAMM** users. If you limit CSIs by **Fault**, then, a user who has completed a Job to repair a particular **Fault** such as **Bleeding**, will be presented with only those CSIs which apply to **Bleeding** to select to show what was actually done in the repair.

Priority

You can limit the application of a **Rule** to only Jobs and Dispatches with certain **Priority**. An example of when you might use this could be if you had a set charge which applied for **Emergency** Jobs and Dispatches.

Add Claim

You must select either **Mandatory**, **Optional (ticked)** or **Optional (unticked)** at the **Add Claim** drop-down list in the **Options** section of the **Automatic Claiming Setup Wizard**. These selections produce different effects.

If you select **Mandatory**, then, when the user completes the Job or Dispatch, the Claim or Estimate Lines will be generated with no input from the user.

If you select **Optional (ticked)** or **Optional (unticked)**, the **Pocket RAMM** and **RAMM Contractor** users can specify the CSIs for which Claim or Estimate lines should be generated at the moment the Job or Dispatch is completed.

Then, when they **Complete** the Job or Dispatch, a list of CSIs will appear. They will be selected by default if the **Optional (ticked)** value was chosen. They will not be selected if the **Optional (unticked)** value was chosen.

One advantage of setting this up is that the user is presented, not with the complete list of CSIs from which to choose, but a list of only those CSIs which directly relate to the Job or Dispatch.

Another advantage is that the CSIs are already selected or cleared dependent upon the likelihood of their use.

Default Quantity

You must select either **Use the Dispatch quantity** or **Use 1 as the quantity** at the **Default Qty** drop-down list in the **Options** section of the **Automatic Claiming Setup Wizard**.

You would select **Use 1 as the quantity** for CSIs such as those which use an hourly rate. The number of hours is unlikely to be able to be predetermined. So the user would need to change the default 1 to the actual number of hours for the Job. So this should be used in conjunction with **Optional (ticked)** or **Optional (unticked)** at the **Add Claim** drop-down list.

You would select **Use the Dispatch quantity** for CSIs where **RAMM Contractor** should calculate the quantity based on other factors in the Job or Dispatch. An example of this could be a Digout with length, width and depth measurements from which **RAMM Contractor** would calculate the Estimate or Claim line charge.

Schedule Items

You select the CSIs from which you want Claim or Estimate lines to be created when the Rule is matched by a Job or Dispatch.

Using the Auto Claiming Wizard

Introduction


Once you have defined your CSIs and associated Maintenance Cost items with them you can set Auto Claiming to automate the process of generating Claim and Estimate lines.

Asset-related Auto Claiming is set up for Street Lights, Signs and Traffic Signals at the Automatic Claims tab of the **Contract Schedule Items** screen. Auto Claiming for all other Assets is set up using the **Auto Claiming Wizard**.

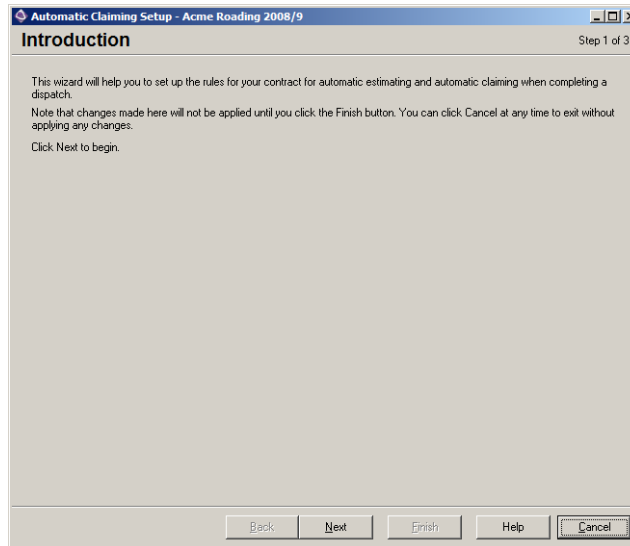
Before you do this you need to have:

- added the CSIs. You do this at the **Contract Schedule Items** screen. See Adding CSIs (on page 238).
- a copy of the contract to which to refer if necessary.


Menu Path

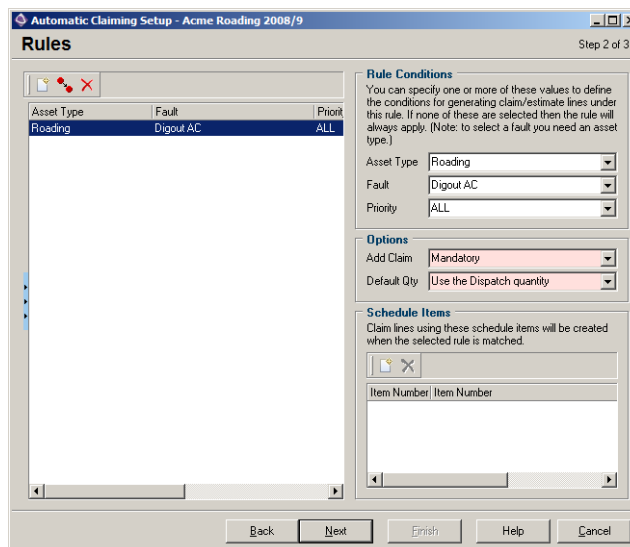
Follow the menu path (add initial Contract details) > (press Schedule Items ) > (add Schedule Items) > Actions > Automatic Claims Setup to open the **Automatic Claiming Setup Wizard** at the **Introduction** screen.

► To Use the Auto Claiming Wizard



To do this you follow these steps:

- 1 Read the message on the screen.
- 2 Press . The **Automatic Claiming Setup** Wizard **Rules** screen will open.




- 3 Press CTRL+N or  to add a new Rule.

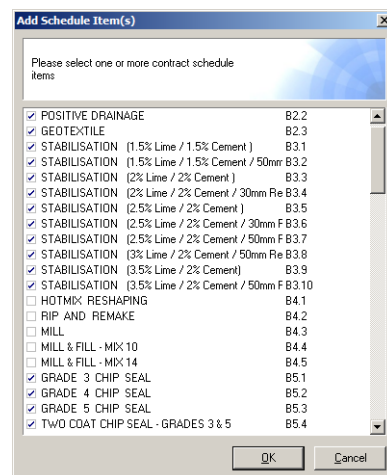
- 4 Select the combination of Asset Type, Fault and Priority for this Rule.
- 5 Select a value from the Add Claim drop-down list.

If, when the user completes the Job or Dispatch, you want	then select
the Claim or Estimate Lines to be generated with no user input	Mandatory
the user to be presented with a list of selected CSIs from which to choose those from which Claim or Estimate Lines will be generated	Optional (ticked)
the user to be presented with a list of CSIs, none of which have been selected, from which to choose those from which Claim or Estimate Lines will be generated	Optional (unticked)


- 6 Select a value from the Default Qty drop-down list.

If, when the user completes the Job or Dispatch, you want	then select
the Claim or Estimate Lines to be generated with no user input	Use the Dispatch quantity
the user to have the option to set a quantity value	Use 1 as the quantity


- 7 Press CTRL+N or  in the Schedule Items section.
The **Add Schedule Item(s)** dialog will open.





- 8 Select the CSIs for the Rule.

- 9 Press .
The dialog will close and you will be returned to the **Automatic Claiming Setup Wizard Rules** screen. The CSIs which you selected will now be listed in the **Schedule Items** section.

- 10 Do you want to create another Rule?

If you want to	then
add another Rule	go to step 3
create a Rule similar to another one	select the one to be copied, press  and go to step 4
close the Wizard	go to step 11.

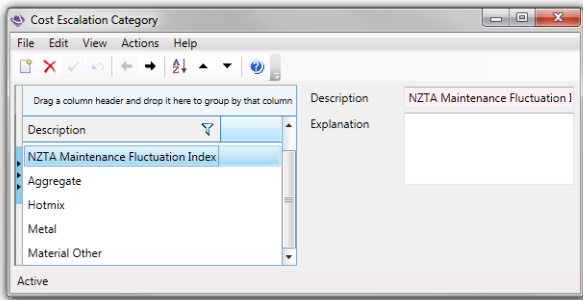
- 11 Press .
The **Automatic Claiming Setup Wizard Summary** screen will open.
- 12 Press .
The screen will close and your changes will be saved.

Cost Escalation

Cost Escalation is a Contract provision to allow groups of Contract costs to be increased during the term of the Contract. The escalation is by an agreed percentage and frequency. It commences from an agreed Initiation Date. The rate of Cost Escalation may vary by item. Contract items subject to the same Cost Escalation imperatives are grouped under the same Cost Escalation Category.



You can enable Cost Escalation only prior to Opening the Contract in **RAMM Contractor**. Once the Contract has been Opened the Enable Cost Escalation option becomes set and is unable to be entered or edited.



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Introduction to Cost Escalation Set Up

The cost of meeting Road Maintenance Contract obligations increases over time.

Rather than have Contractors guess the rate of inflation for the currency of the Contract and incorporate this into their initial tender rates, some Network Owners prefer to include a provision that allows for this increase in costs during the currency of the Contract.

In **RAMM Contractor** this is referred to as Cost Escalation. You set up Cost Escalation in **RAMM Contractor** to match the Contract provisions.

Cost Escalation Categories

Not all Contract costs will increase at the same rate. So Contractors and Network Owners may agree to set up different Cost Escalation Categories to be applied to different Contract cost sets. Where it has been agreed that Contract items are to have Cost Escalation applied, you associate each individual CSI with a Cost Escalation Category.

Cost Escalation Rates

The rate of Cost Escalation is often based on information compiled and released by the government department, Statistics New Zealand. The rate is agreed between the parties to the Contract. Cost Escalation is applied in arrears once the parties have agreed the Cost Escalation percentage. Obviously the rates are not decided until after an agreed period during which the initial standard Contract rates will apply.

Cost Escalation Periods

The parties to the Contract will agree how often Cost Escalation will be applied. Once the Contract is opened the Cost Escalation periods cannot be changed.



You can enable Cost Escalation only prior to Opening the Contract in **RAMM Contractor**. Once the Contract has been Opened the Enable Cost Escalation option becomes set and is unable to be entered or edited.

Cost Escalation Set Up Process

Follow these steps to set up Cost Escalation in **RAMM Contractor**.

Step	Action	Comments
1	Define Cost Escalation Categories.	<p>Cost Escalation Categories are RAMM Contractor items used to group CSIs which are subject to the same rate of Cost Escalation during the currency of a Maintenance Contract.</p> <p>You define Cost Escalation Categories at the Cost Escalation Category screen. See Defining Cost Escalation Categories (on page 278).</p>
2	Enable Cost Escalation.	<p>Cost Escalation is a Contract provision to allow groups of Contract costs to be increased during the term of the Contract. The escalation is by an agreed percentage and frequency. It commences from an agreed Initiation Date. The rate of Cost Escalation may vary by item. Contract items subject to the same Cost Escalation imperatives are grouped under the same Cost Escalation Category. You must enable Cost Escalation in a RAMM Contractor Contract if you wish to apply it.</p> <p>You enable Cost Escalation at the Cost Escalation section on the Claim Options tab of the Claims tab of the Contract Details screen. See Enabling Cost Escalation (on page 281).</p>
3	Associate Cost Escalation Categories with CSIs.	<p>A Contract Schedule Item (CSI) is a RAMM Contractor item which specifies the charges for a particular maintenance Activity under the Contract. If Cost Escalation has been enabled for a Contract you group those CSIs which will have the same percentage increase applied. You do this by associating Cost Escalation Categories with CSIs. It is the agreed rate for the CSI which has Cost Escalation percentage applied to it.</p> <p>You associate Cost Escalation Categories with CSIs at the General section on the General tab of the Contract Schedule Items screen. See Associating a Cost Escalation Category with a CSI (on page 284).</p>

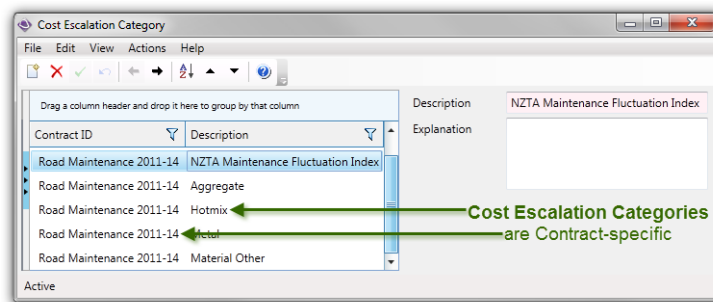
Cost Escalation Categories

Cost Escalation Categories are **RAMM Contractor** items used to group CSIs which are subject to the same rate of Cost Escalation during the currency of a Maintenance Contract.

Contract-specific

Where Cost Escalation provisions are included in a Maintenance Contract you define Cost Escalation Categories for the Contract. You would normally define the Descriptions to match the Contract provisions.

You add Cost Escalation Categories in the normal **RAMM** fashion at the **Cost Escalation Category** screen. Cost Escalation Categories are specific to a single Contract.



Defining Cost Escalation Categories

Introduction

Cost Escalation Categories are **RAMM Contractor** items used to group CSIs which are subject to the same rate of Cost Escalation during the currency of a Maintenance Contract. Where Cost Escalation provisions are included in a Maintenance Contract you define Cost Escalation Categories for the Contract. You would normally define the Descriptions to match the Contract provisions.

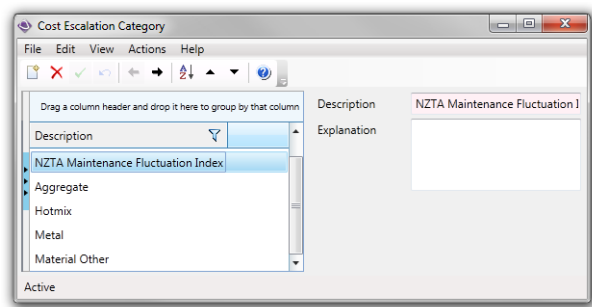
Before you do this you need to have:

- added the initial Contract details. You do this at the General tab on the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a copy of the Contract if necessary
- a logical **Cost Escalation Category** naming system which matches your business practices and the Contract provisions.



Menu Path

Follow the menu path Maintenance > Cost Escalation Categories to open the **Cost Escalation Category** screen.

► To Add Cost Escalation Category Codes



To do this you follow these steps:

- 1 Press .
An empty record will open.
- 2 Type in the **Description** field, the name of this **Cost Escalation Category** code. Normally this would be prescribed in the Contract.
- 3 Type in the **Explanation** field, any information which will be useful to the person applying the code. An example could be the address on the Statistics New Zealand web site where the calculated Cost Escalation rate for this code will be displayed.
- 4 Press .
- 5 Do you want to define another **Cost Escalation Category** code?

Yes	go to step 1.
No	go to step 6.

- 6 Close the screen in the normal manner.

Enable Cost Escalation

Cost Escalation is a Contract provision to allow groups of Contract costs to be increased during the term of the Contract. The escalation is by an agreed percentage and frequency. It commences from an agreed Initiation Date. The rate of Cost Escalation may vary by item. Contract items subject to the same Cost Escalation imperatives are grouped under the same Cost Escalation Category.

You select Enable Cost Escalation if the Contract allows for it. Once the Contract has been opened, the Cost Escalation parameters cannot be changed.



Cost Escalation

☒ Enable Cost Escalation

Cost Escalation Frequency: Yearly

Initiation Date: 1/01/2012

These fields are available only when the Contract is in the Setting Up state

Cost Escalation Frequency

You select how often the Cost Escalation percentage will be applied to match the Contract provisions. The available options at the Cost Escalation Frequency drop-down list are:

- Monthly
- Quarterly
- Six-monthly
- Yearly.

Cost Escalation Initiation Date

The Cost Escalation may be applied from the date chosen at the Initiation Date drop-down calendar. This date must be within the term of the Contract. You can apply Cost Escalation to Claim lines only if the Claim Headers with which they are associated have an End Date which is within the range of the Initiation Date and the date on which Cost Escalation is run.



You can enable Cost Escalation only prior to Opening the Contract in **RAMM Contractor**. Once the Contract has been Opened the Enable Cost Escalation option becomes set and is unable to be entered or edited.

Enabling Cost Escalation

Introduction

Cost Escalation is a Contract provision to allow groups of Contract costs to be increased during the term of the Contract. The escalation is by an agreed percentage and frequency. It commences from an agreed **Initiation Date**. The rate of Cost Escalation may vary by item. Contract items subject to the same Cost Escalation imperatives are grouped under the same **Cost Escalation Category**. You enable Cost Escalation so that you can apply Cost Escalation to Claims occurring after the **Cost Escalation Initiation Date** and during the currency of the Contract.

Before you do this you need to have:

- added the initial Contract details. You do this at the **General** tab of the **Contract Details** screen. See Adding Initial Contract Details (on page 45).
- a **RAMM Contractor** Contract in the **Setting Up** stage which has not been **Opened**
- a copy of the Contract to which to refer.

Menu Path

Follow the menu path Maintenance > Contract Details > (press Claims) > (press Claim Options) to open the **Contract Details** screen at the Claim Options tab.

► To Enable Cost Escalation

The screenshot shows the 'Contract Details' window with the 'General' tab selected. The 'Description' field contains 'Road Maintenance 2011-14'. The 'Security Zone' is set to 'Entire Network'. In the 'Cost Escalation' section, the 'Enable Cost Escalation' checkbox is checked. The 'Cost Escalation Frequency' is set to 'Yearly' and the 'Initiation Date' is '1/01/2012'. The 'Claim Report' section has empty fields for 'Claim Report Header' and 'Claim Report Footer'.

To do this you follow these steps:

- 1 In the **Cost Escalation** section, select **Enable Cost Escalation**.
- 2 Select, from the **Cost Escalation Frequency** drop-down list the frequency at which Cost Escalation may be applied. This value should be prescribed in the Contract.
- 3 Select, from the **Initiation Date** drop-down calendar the date before which Cost Escalation may not be applied. This value should be prescribed in the Contract. This date must be within the currency of the Contract.
- 4 Press . The record will be saved.
- 5 Close the screen in the normal manner.

CSIs and Cost Escalation Categories

A Contract Schedule Item (CSI) is a **RAMM Contractor** item which specifies the charges for a particular maintenance Activity under the Contract. Each Dispatch Claim line uses a single CSI and its associated cost value to identify the cost to the Network Owner of the work being Claimed.

Maintenance Costs May Rise

Where the increase in the actual costs of Network Maintenance is recognised in the Contract, this may be referred to as Cost Escalation. This can be used as a Contract provision to allow groups of Contract costs to be increased by an agreed percentage during the term of the Contract.

The amount of the actual cost increases will vary between CSIs. So you would group CSIs to enable different escalation rates to apply to the different groups of those CSIs.

Group CSIs by Cost Escalation Category

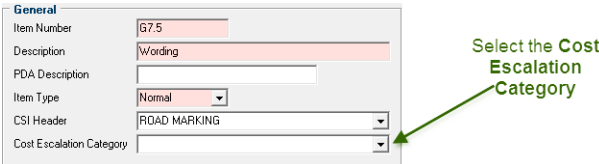
If you wish to apply a standard percentage rate increase to a number of CSIs, you group them by Cost Escalation Category. You define Cost Escalation Categories at the **Cost Escalation Category** screen. See Defining Cost Escalation Categories (on page 278).

Cost Escalation and CSIs

When you are adding CSIs, you can associate them with a Cost Escalation Category. You do this at the Cost Escalation Category drop-down list in the General section on the General tab of the **Contract Schedule Items** maintenance screen. See Associating a Cost Escalation Category with a CSI (on page 284).

Then, when the amount of Cost Escalation has been determined, the Contractor Claims retrospectively for the difference between what was originally Claimed and the amount that would have been Claimed, had the Cost Escalation been applied at the time of Claim Presentation.

It is the Claim Header End Date date, not the date on which the work was Completed which determines whether Cost Escalation may be applied to the CSI rate.



Associating a Cost Escalation Category with a CSI


Introduction

Cost Escalation Categories are **RAMM Contractor** items used to group CSIs which are subject to the same rate of Cost Escalation during the currency of a Maintenance Contract. You associate Cost Escalation Categories with CSIs so that a standard percentage rate increase can be applied at a later date during the currency of the Contract.

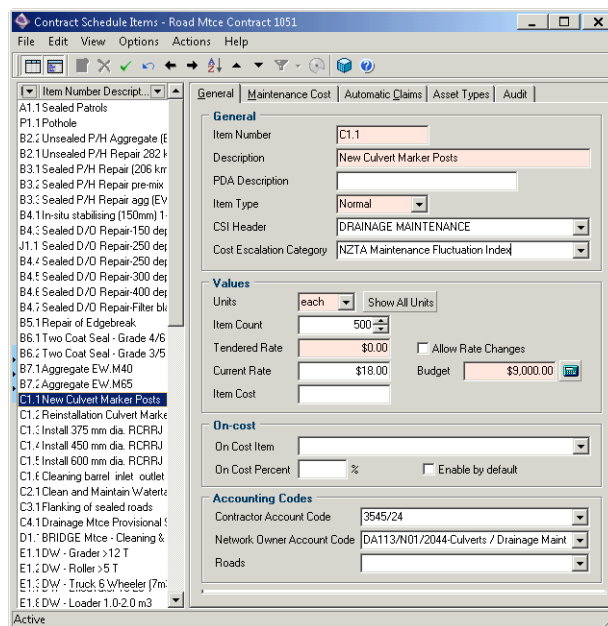
Before you do this you need to have:

- defined your Cost Escalation Categories. You do this at the **Cost Escalation Category** screen. See Defining Cost Escalation Categories (on page 278).
- enabled Cost Escalation. You do this at the the Claim Options tab on the Claims tab of the **Contract Details** screen. See Enabling Cost Escalation (on page 281).
- added your CSIs. You do this at the **Contract Schedule Items** screen. See Adding CSIs (on page 238).

Menu Path

- Follow the menu path (add initial Contract details) > (press Schedule Items ) to open the **Contract Schedule Items** maintenance screen.

► To Associate a Cost Escalation Category with a CSI



Contract Schedule Items - Road Mtce Contract 1051

File Edit View Options Actions Help

General Maintenance Cost Automatic Claims Asset Types Audit

General

Item Number: C1.1

Description: New Culvert Marker Posts

PDA Description:

Item Type: Normal

CSI Header: DRAINAGE MAINTENANCE

Cost Escalation Category: NZTA Maintenance Fluctuation Index

Values

Units: each Show All Units

Item Count: 500

Tendered Rate: \$0.00 Allow Rate Changes

Current Rate: \$18.00 Budget: \$9,000.00

Item Cost:

On-cost

On Cost Item:

On Cost Percent: % Enable by default


Accounting Codes

Contractor Account Code: 3545/24

Network Owner Account Code: DA113/N01/2044-Culverts / Drainage Maint

Roads:

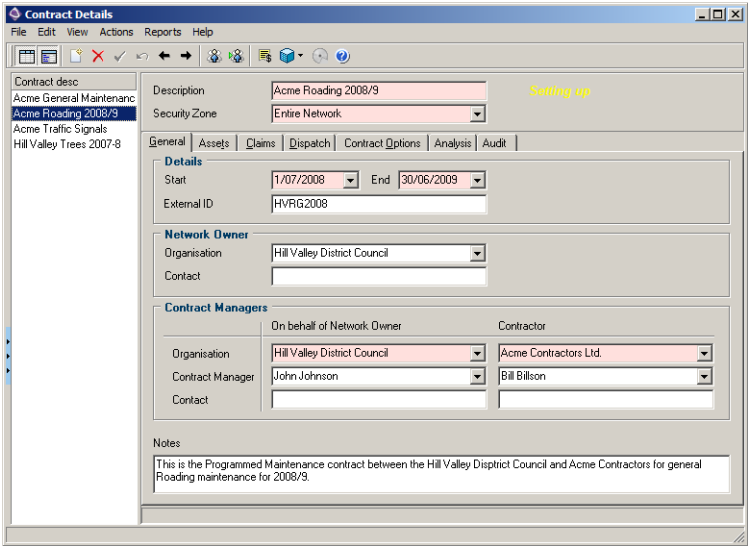
To do this you follow these steps:

- 1 Select, from the (unnamed) **Schedule Item List** panel, the CSI with which you want to associate a **Cost Escalation Category**.
The details of the selected CSI will default into the sections on the right of the screen.
- 2 From the **Cost Escalation Category** drop-down list in the **General** section, select the **Cost Escalation Category** code for the CSI.
- 3 Press .
Your changes will be saved.
- 4 Do you want to associate a **Cost Escalation Category** code with another CSI?

Yes	go to step 1.
No	go to step 5.
- 5 Close the screen in the normal manner.

Open the Contract

When you have completed the Contract set up you **Open** the Contract. Until a Contract is **Opened**, it is not available for use. You can not raise Dispatches against it or perform any of the other tasks for which the Contract exists. You should take great care before opening a Contract as this affects certain user Permissions. Once a Contract has been **Opened** this can not be reversed so that the Contract is once again in **Setting Up** mode.



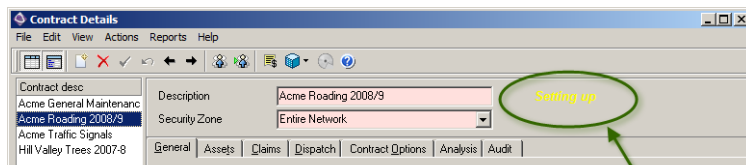
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Before You Open the Contract

Setting Up

The words **Setting up** are displayed in the Banner section of the **Contract Details** screen until the Contract has been opened. This shows that the Contract is not yet available.



Until the Contract is opened, the words **Setting up** display

Permissions

Normal industry practice is that the Contractor performs the initial Contract set up. This entails setting Permission controls for certain fields.

Some of those settings will specify that the Staff Permissions for certain fields are under the control of the Network Owner. So once the Contract has been opened, the Contractor and staff will lose any Permissions associated with those fields until the Network Owner defines them.

Opening the Contract

Introduction

When you have defined all the Contract details you can open the Contract. This makes the Contract available for use. At this stage, all the Permissions which you have defined for the staff will come in to effect. They can log in to the Contract using the [RAMM Hosting Service](#) and perform the duties for which they have Permission.

The words **Setting up** remain on the **Contract Details** screen until the Contract is opened.

Before you do this you need to have:

- performed steps 1 to 41 of the Contract set up process. See Contract Set Up Process (on page 30).

Menu Path

- Follow the menu path Maintenance > Contract Details to open the **Contract Details** screen at the General tab.

► To Open the Contract

The screenshot shows the 'Contract Details' window with the following data:

Field	Value
Description	Acme Roding 2008/9
Security Zone	Entire Network
Start	1/07/2008
End	30/06/2009
External ID	HVRG2008
Network Owner Organisation	Hill Valley District Council
Contract Manager (On behalf of Network Owner)	John Johnson
Contract Manager (Contractor)	Bill Bilson
Notes	This is the Programmed Maintenance contract between the Hill Valley District Council and Acme Contractors for general Roding maintenance for 2008/9.

To do this you follow these steps:

- Follow the menu path Actions > Open Contract.
The words **Setting up** disappear from the **Contract Details** maintenance screen and the Contract is opened.

This screenshot shows the same 'Contract Details' window, but the 'Setting up' text has disappeared, indicating the contract is now open.

- Close the screen in the normal manner to be returned to the **RAMM Contractor** main screen.

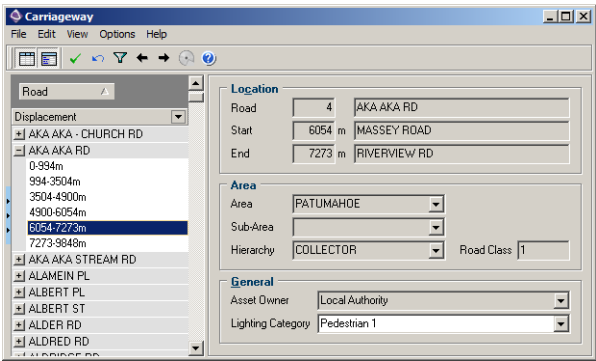
Carriageway

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.

Carriageways are maintained in **RAMM** and **RAMM Network Manager**.

There is not the same requirement to access the Carriageway data in **RAMM Contractor**. You do have the option to view Carriageway data in **RAMM Contractor** but your ability to change data related to Carriageways is very limited.

If you perform Lux Surveys for your Street Lighting, you can maintain the resulting Carriageway data in **RAMM Contractor**.



In This Chapter

Carriageways in RAMM Contractor	292
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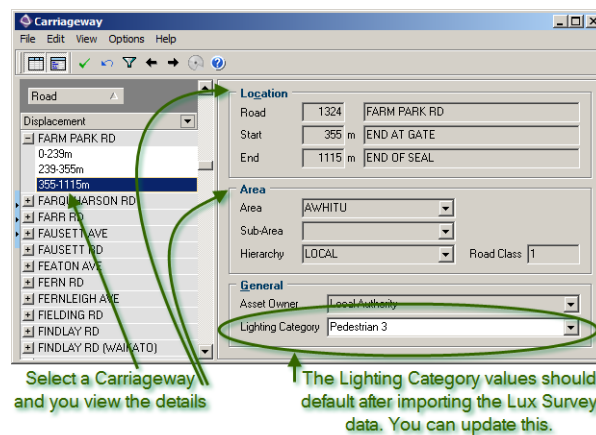
Carriageways in RAMM Contractor

If you want to view Carriageways in **RAMM Contractor**, you do this at the **Carriageway** screen.

You can not maintain Carriageways in **RAMM Contractor**. If you need to maintain Carriageways, you open **RAMM** or **RAMM Network Manager** and perform your changes there.

Lux Survey

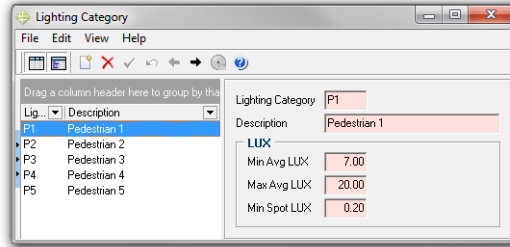
If you carry out Lux Surveys to evaluate the lighting levels on your Roads at night, the results of the Survey will display in the Lighting Category field.



The default values available at the Lighting Category drop-down list are:

- Pedestrian 1
- Pedestrian 2
- Pedestrian 3
- Pedestrian 4
- Pedestrian 5.

These default values have default parameters. You can change both the available values and the default parameters at the **Lighting Category** screen.



Lux Survey Data

You can select Lighting Category values at the Lighting Category drop-down list on the **Carriageway** screen to add Lux Survey data. A more efficient system would be to place the data in an Excel spreadsheet and to import it into **RAMM** using **RAMM Manager**.

For Your Information Only

The Lighting Category data is for your information only and serves no functional purpose in **RAMM Contractor**.

Viewing Carriageways and Lighting Categories

Introduction

You can not maintain Carriageways in **RAMM Contractor**. You can only view them. You can also view and maintain Lighting Category values.

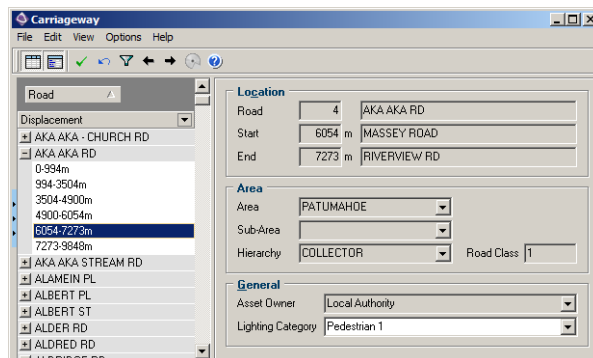
Before you do this you need to have:

- Imported the Lux Survey data if you want to view or maintain Lighting Category values.

Menu Path

Follow the menu path Maintenance > Carriageways to open the **Carriageways** screen.

► To View Carriageways and Lighting Categories



To do this you follow these steps:

- 1 Select the Carriageway whose details you wish to view.
- 2 View the Location, Area and General details.
- 3 If you want to change the Lighting Category value, select the new value from the Lighting Category drop-down list.
- 4 If you want to view details of another Carriageway, go to step 1, otherwise go to step 5.
- 5 Close the screen in the normal way to be returned to the **RAMM Contractor** main screen.

Actions

The **Actions** menu paths relate exclusively to actions which you perform once you have set up your Contract.

This guide contains brief overviews and procedures to introduce you to Dispatches, Patrols, Programmes, the Estimate Review tool, Claims, Claim Headers and the Claim Review tool.

Contractors, Consultants and Network Owners should read the *RAMM Contractor Best Practice* guide to understand running a Contract using **RAMM Contractor**.

In This Chapter

Introduction to RAMM Contractor Actions296

Introduction to RAMM Contractor Actions

Once you have set up your Contract in **RAMM Contractor** you can start to perform your duties according to the original signed contract. The **RAMM Contractor** Actions menu is where you will find most of the day to day activities which you carry out.

Dispatches

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.

See Introduction to Dispatches (on page 300).

Patrols

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.

See Introduction to Contract Patrols (on page 154).

Maintenance Programmes

A maintenance Programme is the agreed maintenance works to be carried out by a Contractor during the Programme period. This is usually one month.

See Introduction to Maintenance Programmes (on page 384).

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.

See Introduction to the Estimate Review Tool (on page 402).

Claims

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.

See Introduction to Claim Headers (on page 408).

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.

See Introduction to the Claim Review Tool (on page 472).

Dispatches

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.

If you use **Pocket RAMM** then when a Dispatch is assigned to the operator the Job will automatically appear on their PDA device.

If you do not use **Pocket RAMM** you will want to print out the Dispatches and assign them manually.

In This Chapter

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Dispatches and the Map	338
Dispatch Actions	339
Dispatch Reports	354
Dispatch Options	364

Introduction to Dispatches

RAMM Contractor Dispatches are items generated to record Faults on the Road Network. A Dispatch can be added **RAMM Contractor** in a number of ways:

- added manually. See Adding a Maintenance Programme Dispatch (on page 332).
- it may be generated from the call centre of the Network Owner or Consultant
- it may be or received from **Pocket RAMM**. Dispatches are called Jobs in **Pocket RAMM**.

All Dispatches are entered against a Contract and allocated a unique system-generated number. Dispatch source details, such as the person reporting the problem, the date, and a description of the problem are also recorded.

Dispatch Screen

You add and maintain Dispatches at the **Dispatch** maintenance screen.

See Dispatch Screen (on page 301).

Dispatch Maintenance

The **Dispatch** maintenance screen has many standard **RAMM** maintenance functions. There are two functions which are unique to Dispatch maintenance. These are the Auto Insert Claim Lines feature and the Duplicate a Dispatch feature.

See Dispatch Maintenance (on page 326).

Dispatches and the Map

The **Map** opens from the **Dispatch** maintenance screen with the highlighted Dispatch centred and displayed. You can also open the **Map** in a screen of its own.

See Dispatches and the **Map** (on page 338).

Dispatch Actions

You take actions to reflect Dispatch progress.

See Dispatch Actions (on page 339).

Dispatch Reports

There are a number of reports which you can run from the **Dispatch** maintenance screen. The reports are mostly available elsewhere. You run these reports from the **Dispatch** maintenance screen to limit the results to data from a particular set of Dispatches in the (unnamed) Dispatch List panel.

See Dispatch Reports (on page 354).

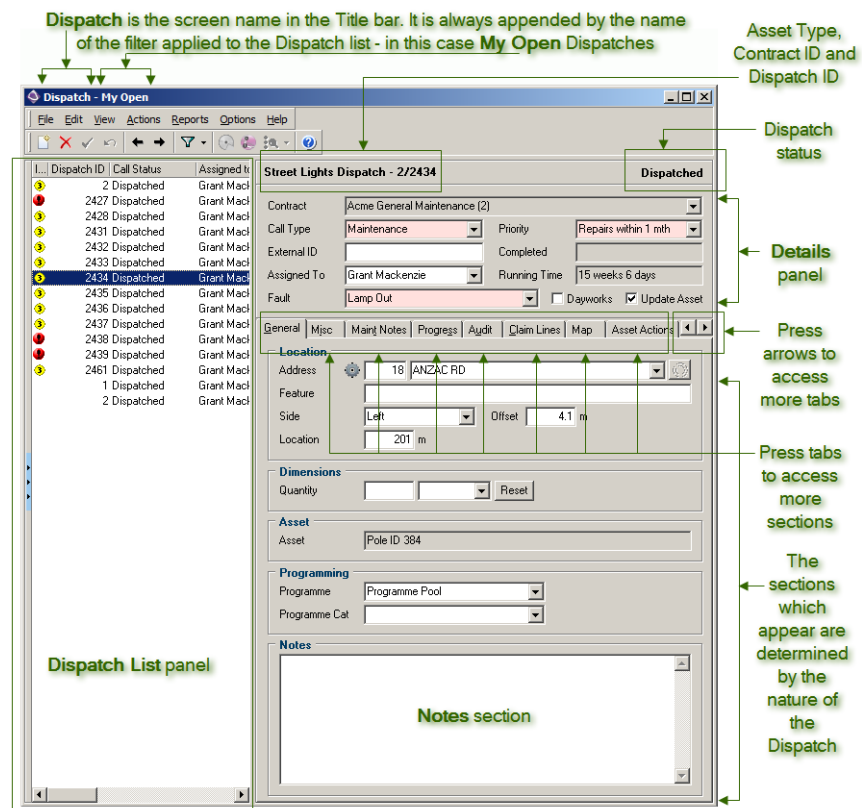
Dispatch Options

Before you work in the **Dispatch** maintenance screen you should set it up so you are as efficient as possible. You may also need to set it up to match your role and your work practices.

See Dispatch Options (on page 364).


Dispatch Screen

You add and maintain Dispatches at the **Dispatch** maintenance screen.

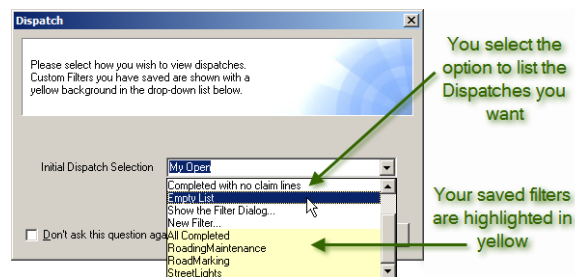


Dispatch Filter Screen

You add and maintain Dispatches at the **Dispatch** maintenance screen.

When you open the **Dispatch** screen by pressing the Dispatch Entry icon  or by following the menu path Actions > Dispatch Entry, the **Dispatch** Filter selection screen opens.

You use this to manage the initial selection of the Dispatches which you want listed.



Filter Options

The fewer Dispatches you choose to display, the faster the screen will load and the easier it will be to locate Dispatches you wish to find. You have the following preset filters from which to choose:

- **My Open**
Only Dispatches assigned to you which have not been Completed will be listed.
- **All Open**
Every open Dispatch for the Asset Types selected at the **Add Asset Types** screen when setting up the Contract will be listed. This is the default.
See Selecting Contract Asset Types (on page 53).
- **Open with No Dollars**
Every Dispatch with no dollar amount in the Estimate or Claim lines, which has not been Completed, will be listed. A Contract Manager would use this setting to check that maintenance work is not being performed at no charge.
- **Completed with no Claim Lines**
Every Dispatch which has been Completed but which has no Claim lines will be listed. A Contract Manager would use this setting to check that maintenance work is not being performed at no charge.
- **Empty List**
This removes all default filtering so that the screen opens as quickly as possible. No Dispatches are listed. You would use this setting when adding Dispatches.

- **Show the Filter Dialog**

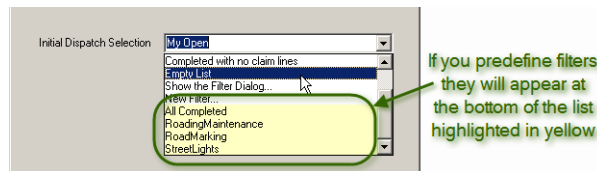
This opens the **Filter Dialog**. You can then configure a Filter to define exactly which Dispatches will be listed in the **Dispatch** maintenance screen. If you configure and save the Filter, it will then be available from the **Initial Dispatch Selection** drop-down list. See below.

The option you choose at the Initial Dispatch Selection drop-down list will become the default next time you open the screen.

Filters You Define

You can define your own Filters so that your own particular Dispatch list sets are available to you when you open the **Dispatch** maintenance screen.

If you select the Show the Filter Dialog option and define and save a Filter, it will then become available at the Initial Dispatch Selection drop-down list. It will be highlighted in yellow. See the graphic below.



You select the Don't ask this question again check box if you do not want the **Dispatch** Filter screen to open before the **Dispatch** maintenance screen. Then the **Dispatch** maintenance screen will open every time with the Filter setting you have chosen.

You would do this if you perform the same actions every time you open the **Dispatch** maintenance screen.

To change the Filter you follow the menu path Options > Initial Filter Option and clear Don't ask this question when opening check box on the **Initial Filter** screen.

Details Panel

The **Details** panel contains the information basic to all Dispatches.

Roading Dispatch - 2/2431		Dispatched	
Contract	Acme General Maintenance (2)		
Call Type	Staff	Priority	Repairs within 1 mth
External ID		Completed	
Assigned To	Grant Mackenzie	Running Time	2 weeks 2 days
Fault	Digout AC <input type="checkbox"/> Dayworks		

Dispatch Information Bar

The (unnamed) Dispatch Information bar at the top of the Detail panel displays the Asset Type for the Dispatch. In the example above this is **Roading**. It displays the Contract number and the Dispatch Number. In the example above this is 2/2431. It also displays the Dispatch status. In the example above this is **Dispatched**.

Contract

This mandatory field is for the Contract to which the Dispatch is linked. If you have more than one Contract for the Asset Type selected at the **Select Asset Type** screen you will have a choice at the Contract drop-down list.

If you have selected an incorrect Contract when adding a Dispatch you follow the menu path **Actions > Change Contract** or press CTRL+G to make the Contract drop-down list available.

Call Type

Every Dispatch must have an associated Call Type code. Call Types are important as they allow a Contract Manager to see immediately the source of a Dispatch. See Dispatch Call Types (on page 100).

You can add more details related to the Call Type at the Misc tab. See Miscellaneous Tab (on page 310).

You add Call Type codes at the **Call Types** maintenance screen for the Asset Type selected. See Adding Dispatch Call Types (on page 102).

Priority

Every Dispatch must have an associated Priority code. You add Priority codes to associate them with Dispatches and Jobs. Staff who programme and assign Dispatches can then tell which should be performed first. You can also use Priority codes to ensure emergencies stand out from all other Dispatches regardless of Priority. See Priority (on page 148).

You add Priority codes at the Priority tab on the **Contract Details** screen. See Adding Priority Codes (on page 149).

External ID

You may type in the External ID field an alphanumeric reference. You would use this to reference a Fault logging system outside **RAMM Contractor**.

Completed

This field shows the date and time at which the Dispatch was Completed. This is a system-generated value. The field is unable to be entered or edited.

Assigned to

This is a drop-down list from which to select the person or crew to whom the Dispatch has been assigned. The list is comprised of staff who have been granted the Can be Assigned Dispatches Permission at the **Staff Permissions** screen. See Setting Custom Security Permissions (on page 125).

Running Time

This field shows the number of weeks and days from when the Dispatch was added to when it was Completed. These are system-generated values. The field is unable to be entered or edited.

If the Dispatch has not been Completed, the field displays number of weeks and days from when the Dispatch was added to the present day.

Fault

Every Dispatch must have an associated Fault Category code. You can select a value from the drop-down list or type in your own value. It is more efficient to have predefined values from which to choose.

You create Fault Categories so the reason for a Dispatch is clear. Dispatches are created so that Faults can be repaired. So before you can create a Dispatch, you must have created the appropriate Fault Category.

You add Dispatch Fault Category codes at the **Fault Categories** maintenance screen for the Asset Type selected. See Defining Dispatch Fault Categories (on page 109).

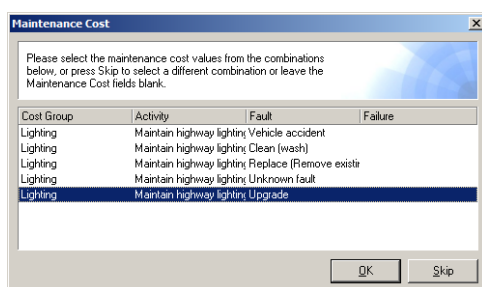
Dayworks

You select this check box to define a Dispatch as Dayworks. When selected, the fields in the Maintenance Cost section of the Misc tab become available.

Maintenance Cost	
Cost Group	Shoulder
Activity	Shoulder maintenance
Fault	Edge break
Failure	

If you have set up your Maintenance Costs to default, then when the check box is selected the values will default into the appropriate fields. See Associate Maintenance Costs Values with Claim Lines (on page 83).

If you have set up your Maintenance Cost Group Activities to have more than one linked Fault, the following screen will open when you select the Dayworks check box. You then make a selection from the list or skip the options and select your own.



Update Asset (Not Shown Above)

This option applies only to Contracts for Signs, Street Lights and Traffic Signals. You select this option to have the appropriate Asset Type screen open at the completion of the Dispatch so that the Asset can be updated.

You set this option to default to Selected or Cleared when setting up the Contract. You do this at the Show Asset screen upon completing a dispatch in RAMM Contractor option on the Dispatch tab of the Contract Options tab at the **Contract Details** screen. See Setting Dispatch Options (on page 179).

Once the Contract has been opened, only the Network Owner can change the value at the Show Asset screen upon completing a dispatch in RAMM Contractor option.

General Tab







The General tab is for the Fault Location, Dimension, Asset identification, and Programming details. There is also space for notes to assist the Field Crew.

Location

The Address, Side, Offset and Location fields are used to help the maintenance crew get to the Dispatch location quickly.

When the information in these fields is not precise enough then you can type the description of a helpful landmark in the Feature field to help the Field Crew locate the Fault. An example could be In front of the large Oak tree.

The GPS Coordinates icons display adjacent to the Address field if the GPS coordinates are recorded with the Dispatch. These are used for plotting the position of the Dispatch on the **Map**. The icon changes to indicate the source of the coordinate information.

-  Calculated using Address information. This icon indicates that the coordinates will be automatically recalculated.
-  From GPS coordinates taken from an Asset.
-  From a manual position setting, by the user clicking or tapping a location on the **Map**.
-  From a GPS device.
-  From another source such as a User Defined Asset. See the User Defined Tables chapter in the *Working with RAMM* guide. The question mark is blue.
-  From an unknown source such an older application such as SLIM, Traffic Signals or Signs, or that the location was copied from the Asset. The question mark is red.

Dimensions

Dimensions

Length

188 m

Width

0.8 m

Depth

200 mm

Quantity

150.4 m2

Reset

The Length, Width, Depth and Quantity fields and the available Units are determined when you defined the Dispatch Fault Category code. See Dispatch Fault Categories (on page 107).

Not all Fault Category codes require the Dimensions to be recorded. So this section will not always display.

Asset

Asset

Asset

Berm ID 6

The Asset section applies to Signs, Street Lights and Traffic Signals and other Assets with their own tables - ie non sundry Assets. If the identity of the Asset is known it will display as above if you select it from the **Map**. The field will be unable to be entered or edited.

Asset

Likely ID

Map Pole ID

Pole Number

Power Board Number

Value

If the identity of the Asset is not known, the Likely ID drop-down list will become available. The values available at this drop-down list will vary dependent on the Asset Type. You have the option to select the column in the Asset table to which the Likely ID refers. This could be Sign Number, Sign Type or any number of Pole identifiers. You type the most likely identifier of the Asset in the Value field.

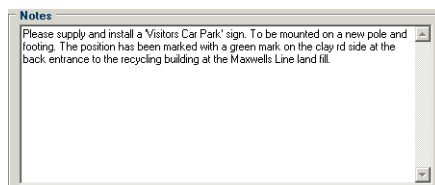
Programming



If Programming has been enabled for the Contract with which the Dispatch is associated, the Programming section will be visible. If you have enabled Programme Categories to further categorise or prioritise Dispatches, the Programme Category field will be available.

You enable Programming at the Programming tab on the Contract Options tab of the **Contract Details** screen. See Enabling Programming (on page 184).

Notes



There is a Notes section for you to type information which will be of use to the Field Crew.

Analysis Tab

The Analysis tab contains sections to record the Dispatch Groups and Claim Groups if you use them. It also contains the Maintenance Costs values if you have set up Maintenance Costs to be associated with Fault Categories, and therefore with the Dispatch as a whole. Dayworks Dispatches generally have their Maintenance Costs values associated in this manner.

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. If you use Dispatch Groups for Asset Types, you can select one from the drop-down list which will have a user defined name. In the example below this is *Business Hours*. You can have up to four Dispatch Groups.

You add Dispatch Groups at the **Dispatch Group (Asset Type)** screen. See Adding a Dispatch Group (on page 92).



The screenshot shows a window titled "Dispatch Groups". Inside, there is a label "Report Time" followed by a dropdown menu. The dropdown menu is open, showing "Business Hours" as the selected option.

Claim Groups

Contract Claim Groups are used to group Claims for analysis and reporting purposes for an individual Contract. You create them only if a standard **RAMM Contractor** function to group the Claim lines does not already exist. If you use Claim Groups for Asset Types, you can select one from the drop-down list which will have a user defined name. In the example below this is *Claim Group 1*. You can have up to four Claim Groups.

You add Claim Groups at the **Claim Group (Asset Type)** screen. See Adding a Claim Group (on page 95).



The screenshot shows a window titled "Dispatch Claim Groups". Inside, there is a label "Claim Group 1" followed by a dropdown menu. The dropdown menu is open, showing "Claim Group 1" as the selected option.

Maintenance Cost

Maintenance Costs are used by the Network Owner to analyse the Network. They are also used in the export to dTIMS for pavement deterioration modelling. In particular, Cost Group, Activity and Fault values are used for this purpose. The Maintenance Cost section appears on the Analysis tab only if the Contract with which the Dispatch is associated has had this enabled. This would often be done to allow for Dayworks.

You enable the availability of the Maintenance Cost section on the Analysis tab for a Contract by selecting the Enable Maintenance Costs on Dispatches option at the Dispatch tab on the Contract Options tab of the **Contract Details** screen. See Setting Dispatch Options (on page 179).

If you have selected the Enable Maintenance Costs on Dispatches option, you can set default Maintenance Cost values for Dispatch Fault Category codes.

You select the default Maintenance Cost values for a Dispatch Fault Category code at the **Fault Categories (Asset Type)** maintenance screen. See Defining Dispatch Fault Categories (on page 109).

Maintenance Cost	
Cost Group	Shoulder
Activity	Shoulder maintenance
Fault	Edge break
Failure	

Miscellaneous Tab

The Misc tab contains sections to record the details of the person or Patrol which reported the Fault, external references where necessary, the personnel in charge of the Dispatch and any other Dispatches to which the Dispatch is linked.

Only one of the Patrol Details, Caller Details and Reported By sections may appear on the Misc tab at any one time. The section which appears is determined at the Call Types maintenance screen for the Asset Type selected.

See Dispatch Call Types (on page 100).

Patrol Details

Patrol Details	
Patrol	Millford Monthly Urban
Period	01/07/2008 12:00 pm 01/07/2008 11:59 pm

If the Fault was reported by a Patrol using **Pocket RAMM**, the details of the Patrol will default. If using a manual system, you select, from the Patrol drop-down list, the Patrol which you created at the **Patrol Records** screen. The date, start time and end time of the Patrol will default into the Period fields.

See Introduction to Patrol Records.

Caller Details

Caller Details	
First Name	Grant
Phone No.	09 123 4567
Surname	Mackenzie
Mobile No.	021 098 765

When the Fault is reported by a person, you type their details into the fields in the Caller Details section.

Reported By

Reported By	
Company	RAMM Software Ltd
Phone No.	09 415 3744
Contact	Grant Mackenzie
Mobile No.	021 123 4567

When the Fault is reported by an organisation, you type the details into the fields in the Reported By section.

Job Identifiers and Job Managers

Job Identifiers

External IDXYZ2001

Police Event NoTK010108/347

Job Managers

ClientJoan Jones

ContractorBill Billson

Where you may want to refer to the records of an external organisation such as the Police, or where they may require to enquire into your records, you type the details of their identifier or code into the External ID or Police Event No fields.

If the person who added the Dispatch has Permission to be a Job Manager for Dispatches, their name will default into the Client field if they represent the Network Owner or the Contractor field if they work for the Contractor. If the person adding the Dispatch does not have the correct Permission then they can select from the drop-down lists the name of a person who does. The drop-down lists show only those users who have the Permissions Can be the Client Job Manager and Can be the Contractor Job Manager respectively.

You set Staff Permissions at the Staff Permissions maintenance screen. See Setting Custom Security Permissions (on page 125).

Dispatch Links

Dispatch Links

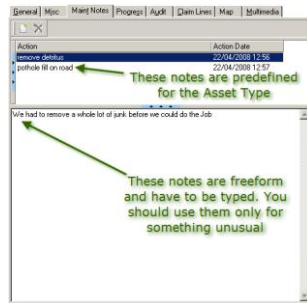
Explanation	Contract / ...	Fault Desc
Transferred from 1	4/1	Tree Roots

You have the option of linking one Dispatch with another in a variety of ways. You can Transfer one Dispatch to another by following the menu path Actions > Transfer Dispatch. You can also have Dispatches with Parent Child relationships. These relationships display in the Dispatch Links section.

Maintenance Notes Tab

Best practice, when staff have finished performing a Job, is to list the tasks undertaken to fix the Fault. You create Maintenance Note Actions so that Pocket RAMM users can easily enter notes describing what they actually did to Complete the Job. You can also add these Maintenance Note Actions to a Dispatch at the Maint Notes tab.

You add Maintenance Note Actions at the Maintenance Note Actions tab on the Dispatch tab of the Contract Details screen. See Adding Maintenance Note Actions (on page 151).

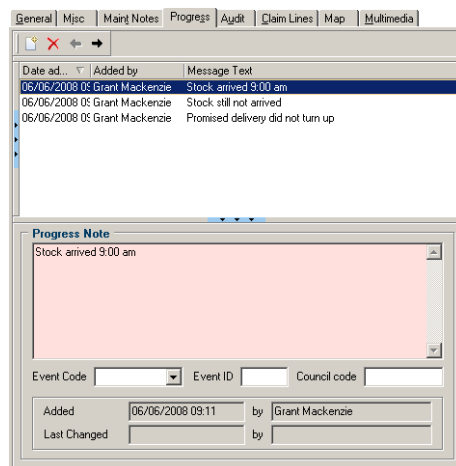


Maintenance Note Actions are different from general Notes and Progress Notes.

They concern work that has already been completed. So they should be written in the past tense to make this clear.

Progress Tab

The Progress tab holds the Dispatch Progress Notes. Progress Notes are a record of a change which has occurred to a Dispatch.



User Defined Progress Notes

You add your own user defined Progress Notes. 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.

Event Codes

Event Codes are used in Progress Notes to create an audit trail of changes made to a Dispatch. These are recorded at the Progress tab on the Dispatch maintenance screen. The Event Code, Event ID, and Council Code fields are all optional.

An Event code is a RAMM Contractor item. You create and use them to make tracking Dispatch progress standard and readily understandable. Event codes can be an internal user-defined set to ensure consistency and comprehensibility or may be specified in the contract with the Network Owner. You can filter by Event code.

You add Event codes at the Event Codes maintenance screen. See Adding Progress Note Event Codes (on page 106).

Print

You can print Progress Notes with the details of the selected Dispatch.

Audit Tab

The Audit tab has two subsidiary tabs. The Summary tab lists the Dispatch times, dates, Response Time, Positioning Source and other relevant audit information. The Detail tab lists changes made to the Dispatch.

Dispatch Dates

Dispatch Dates	
Entered	31/01/2008 12:02:00 p.m.
Programmed	31/01/2008 by Grant Mackenzie
Dispatched	31/01/2008 12:02:00 p.m.
Time on Site	31/01/2008 12:02:00 p.m.
Responded	31/01/2008 13:02:00 p.m. Grant Mackenzie
Expected Complete	
Completed	31/01/2008 14:02:00 p.m.

The Dispatch Dates section lists dates, times and names to give you a time line of the changes taking place over the lifetime of the Dispatch.

You determine at the time you set up the Contract whether these values will be recorded. See Settings (on page 187).

Response Time

Response Time	
KPI Target	14 days
KPI Actual	4 days*
Under by	10 days - Good (<50% of the target)

The Contractor and the Network Owner both have an interest in the time it takes from when a Dispatch is added to **RAMM Contractor** or to **Pocket RAMM** to when it is Assigned to and Completed. If the contract with the Network Owner requires you to perform to certain Response Times, you can set these up in the Contract.

If you enable Response Times and set up Targets, every Dispatch will have Response Time information stored against it. The Response Time panel displays how successfully the KPI targets have been met for the Dispatch.

You enable Response Times and set up Targets at the Response Time tab on the Contract Options tab of the **Contract Details** maintenance screen. See Response Time (on page 185).

Record

Record	
Added	31/01/2008 12:06 by Grant Mackenzie
Last Changed	26/05/2008 11:43 by Grant Mackenzie

The Record section displays the date and time that the Dispatch was added into **RAMM Contractor** and the person who added it.

It also shows a record of the last change made to the Dispatch.

Positioning Source

Positioning Source	
GPS Method	Update RAMM from Map by CJN Technologies Limited

The Positioning Source section displays the GPS Method used to determine the position of the Dispatch.

Detail Tab

General Misc Main Notes Progress Audit Claim Lines Map Multimedia				
Summary Detail				
Explanation	Date added	Added by	Change Sou	
Changed Council code from " " to "AAA"	06/06/2008 09:34	Grant Mackenzie	RAMM Cont	
Changed Event ID from " " to "123"	06/06/2008 09:34	Grant Mackenzie	RAMM Cont	
Changed Date Sent from "6/06/2008 9:06/06/2008 09:34	06/06/2008 09:34	Grant Mackenzie	RAMM Cont	
Changed Event Code from "Null" to "Cou. 06/06/2008 09:34	06/06/2008 09:34	Grant Mackenzie	RAMM Cont	
Added a new Dispatch Progress	06/06/2008 09:11	Grant Mackenzie	RAMM Cont	
Added a new Dispatch Progress	06/06/2008 09:10	Grant Mackenzie	RAMM Cont	
Added a new Dispatch Progress	06/06/2008 09:09	Grant Mackenzie	RAMM Cont	
Changed Priority from "When Budget All 04/06/2008 12:33	06/06/2008 12:33	Grant Mackenzie	RAMM Cont	
Changed Call Status from "No Action R: 23/05/2008 15:54	23/05/2008 15:54	Grant Mackenzie	RAMM Cont	
Changed Call Status from "Entered" to " 23/05/2008 15:53	23/05/2008 15:53	Grant Mackenzie	RAMM Cont	
Changed Call Status from "Dispatched" to " 23/05/2008 15:51	23/05/2008 15:51	Grant Mackenzie	RAMM Cont	
Changed Call Status from "No Action R: 23/05/2008 15:51	23/05/2008 15:51	Grant Mackenzie	RAMM Cont	
Changed Call Status from "Entered" to " 23/05/2008 15:50	23/05/2008 15:50	Grant Mackenzie	RAMM Cont	
Changed Call Status from "Dispatched" to " 23/05/2008 15:50	23/05/2008 15:50	Grant Mackenzie	RAMM Cont	
Added a new Dispatch Entry	09/10/2007 12:02	Grant Mackenzie	RAMM Cont	
Added a new Dispatch Entry	09/10/2007 12:02	Grant Mackenzie	RAMM Cont	

When setting up a Contract you have the option to have all changes to a Dispatch recorded as Audit records. Normally you would want to select this option as this creates an audit trail. If you do not use **Pocket RAMM** but use a paper or manual system to enter Dispatches you may not want to select this option. Similarly, if you are a small one person operation there may be no need.

If you choose to have **RAMM Contractor** keep audit records for Dispatches they will display at the Detail tab of the Audit tab on the **Dispatch** maintenance screen.

The actual records which are generated will depend on decisions made when you set the Audit Records options.

You do this at the Auditing tab on the Contract Options tab of the **Contract Details** screen. See Setting Audit Record Options (on page 202).

Claim Lines Tab

You use the Claim Lines tab for the Estimation and Claims process.

To understand how best to use the Claim Lines tab you should read the *RAMM Contractor Best Practice* guide.

Not Immediately Available

The Claim Lines tab does not become available until you have saved the Dispatch details. Once the Contract, Call Type, Priority, Fault and General details have been added and saved you can define the Estimate lines.

When a Contractor has saved the initial Dispatch details and presses the Claim Lines tab, only the Add Estimate Line button is available.

Item Estimate Values

When you press Add Estimate Line button, the Item, Quantity, Rate, Amount, Fixed price, Work Complt and by fields become available.

You select the Schedule Item for the Estimate line from the Item drop-down list. The values then default into the Item Number, Units, Quantity, Rate, Amount and Status fields. Only the Quantity field will be available. When the Estimate line has been Accepted, this field will be unavailable.

You set the agreed dollar values for CSIs when you add them at the **Contract Schedule Items** maintenance screen. It will be named using the actual Contract description. See Adding CSIs (on page 238).

Details

The **Schedule Item** selected determines the dollar values

The Claim line values match the **Accepted Estimate Line** values

What you see at the Details tab depends on your Staff Permissions, whether you are the Contractor or the Network Owner and the Estimate and Claims cycle.

Analysis

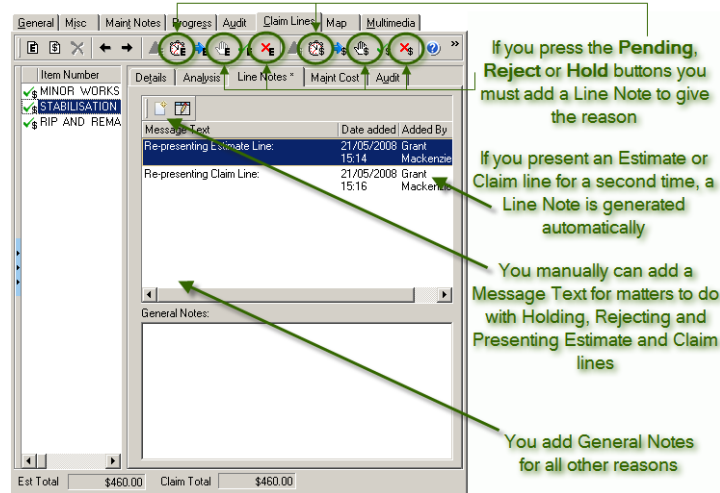
These fields will have the names you gave them when you set up the Contract

Contract Claim Groups are used to group Claims for analysis and reporting purposes for an individual Contract. You create them only if a standard **RAMM Contractor** function to group the Claim lines does not already exist.

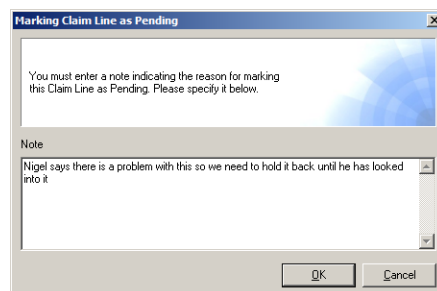
Claim lines can be associated with general ledger account codes for financial analysis and reporting purposes. You add Account codes in **RAMM Contractor** and associate Contract CSIs with them. Once Claims have been accepted, the financial information at Claim line level can then be exported into an external accounting application. Both the Contractor and Network Owner can do this.

You associate each Estimate and Claim line with Contract Claim Groups and Account codes at the Analysis tab. You add Claim Groups at the Claim Group tab on the Analysis tab of the **Contract Details** screen. See Adding Claim Groups (on page 142). You add Account codes at the Contractor Account Code and Network Owner Account Code tabs on the Analysis tab of the **Contract Details** screen. See Adding Account Codes (on page 144).

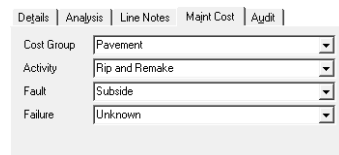
Line Notes



When you place an Estimate or Claim line on Hold, set it to Pending or Reject it, a dialog will open for you to type in a Line Note for future reference.



Maint Cost



Best practice is to set up Maintenance Costs so that they default. See Associate Maintenance Costs Values with Claim Lines (on page 83).

If you do not set the values to default you must select the Cost Group, Activity, Fault and Failure values at the Maintenance Cost tab on the Claim Lines tab of the **Dispatch** screen. You do this for each individual Claim Line.

See Associate Maintenance Costs Values with Claim Lines (see "Associate Maintenance Cost Values with Dispatches" on page 82).

Audit

Details | Analysis | Line Notes * | Maint Cost | Audit

Summary | Detail

Estimate

Maintained	21/05/2008 15:13	by	Bill Billson
Presented	21/05/2008 15:14	by	Bill Billson
Accepted	21/05/2008 15:14	by	John Johnson

Claim

Maintained		by	
Presented	21/05/2008 15:16	by	Bill Billson
Accepted	21/05/2008 15:16	by	John Johnson

Record

Added	21/05/2008	by	Grant Mackenzie
Add Method	Manually Entered		
Updated	21/05/2008	by	Grant Mackenzie

RAMM Contractor generates and holds an audit trail of actions taken for each Claim and Estimate line.

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

Item Number

Details | Analysis | Line Notes * | Maint Cost | Audit

Summary | Detail

Explanation
Changed Claim Number from 'Null' to 'May 2007'
Added a new Claim Line

Est Total \$2000.00 Claim Total \$2000.00

You can set RAMM Contractor to generate and hold details of individual changes to Estimate and Claim lines. You define whether RAMM Contractor does this and the details to be kept when you set up the Contract.
































You do this at the Auditing tab of the Contract Details screen. See Auditing (on page 200). Also see Setting Audit Record Options (on page 202).






Claim Lines Tool Bar for the Contractor

There are a number of tool bar buttons on the Claim Lines tab which are available to Contractor staff.



The availability of the buttons will depend on the Staff Permissions of the user and the status of the Estimate and Claim lines.

-  **Add Estimate Line**
Press this button to add a new Estimate line to the Dispatch. This button is available until the Dispatch has been **Completed**. The Estimate line will have a status of  **Open**.
-  **Add Claim Line**
Press this button to add a new Claim line to the Dispatch.
-  **Delete Record**
Press this button to delete the highlighted Estimate or Claim line. This button is available only when the Claim or Estimate line has not been **Presented**.
-  **Previous Record**
You press this button to move to the previous Claim or Estimate line.
-  **Next Record**
You press this button to move to the next Claim or Estimate line.
-  **Reopen Estimate**
You press this button to reopen an Estimate line which has been **Presented**. This action changes the status of the Estimate line from  **Presented** to  **Open**. The button is not available unless the highlighted Estimate line has a status of  **Presented**.
-  **Mark Estimate as Pending**
You press this button to mark an Estimate line as  **Pending**. This means that it is identified as needing attention before being **Presented**. The button is available only if the highlighted Estimate line has a status of  **Open** or  **Presented**.
-  **Present Estimate**
You press this button to **Present** the highlighted Estimate line. The line will then have a status of  **Presented**.
-  **Hold Estimate**
You press this button to place an Estimate line **On Hold**. It will then have a status of  **Held**. This indicates that you wish to discuss the Estimate line before **Presenting** it. Before you place an Estimate line **On Hold** you must type a note in the (unnamed) **Notes** field to explain why you have placed the Estimate line **On Hold**.
-  **Reopen Claim**
You press this button to reopen a Claim line which has been **Presented**. This action changes the status of the Claim line from  **Presented** to  **Open**. The button is not available unless the highlighted Estimate line has a status of  **Presented**.
-  **Mark Claim as Pending**
You press this button to mark a Claim line as  **Pending**. This means that it is identified as needing attention before being **Presented**. The button is available only if the highlighted Claim line has a status of  **Open** or  **Presented**.
-  **Present Claim Line**
You press this button to **Present** the highlighted Claim line. The line will then have a status of  **Presented**.
-  **Present All Estimates**
You press this button to **Present** all the Estimate lines in the Dispatch. The lines will then have a status of  **Presented**, including those with a status of  **Pending**.













-  **Present All Claims**
You press this button to **Present** all the Claim lines in the Dispatch. The lines will then have a status of  **Presented**, including those with a status of  **Pending**.
-  **Change Claim Header**
You press this button to open the **Change Claim Header** dialog. From there you can select the new Claim Header for the highlighted Claim line.
-  **Change Claim Header for All**
You press this button to open the **Change Claim Header** dialog. From there you can select the new Claim Header for all Claim lines for the Dispatch.







Claim Lines Tool Bar for the Network Owner

There are a number of tool bar buttons on the Claim Lines tab which are available to Network Owner staff.



The availability of the buttons will depend on the Staff Permissions of the user and the status of the Estimate and Claim lines.

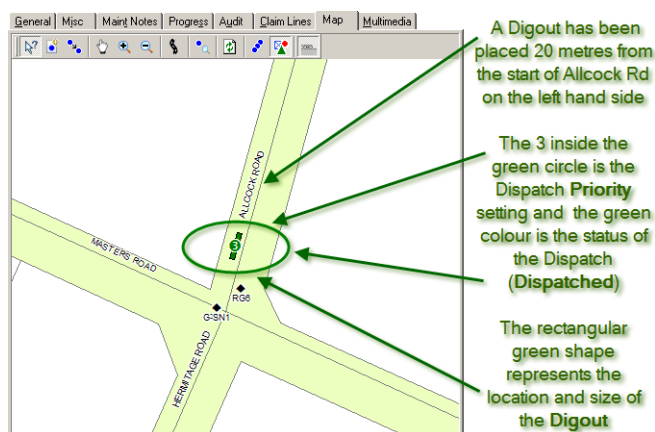
-  **Previous Record**
You press this button to move to the previous Claim or Estimate line.
-  **Next Record**
You press this button to move to the next Claim or Estimate line.
-  **Hold Estimate**
You press this button to place an Estimate line **On Hold**. It will then have a status of  **Held**. This indicates to the Contractor that you will not be **Accepting** this Estimate line until changes have been made. Before you place an Estimate line **On Hold** you must type a note in the **Hold Estimate Line** dialog which opens when you press the button. You need to explain to the Contractor why you have placed the Estimate line **On Hold**.
-  **Accept Estimate**
You press this button to **Accept** an Estimate line. It will then have a status of  **Accepted**.
-  **Reject Estimate**
You press this button to **Reject** an Estimate line. It will then have a status of  **Rejected**. This indicates to the Contractor that you will not be **Accepting** this Estimate line under any circumstances. Once you have **Rejected** an Estimate line you must type a note in the (unnamed) **Notes** field to explain to the Contractor why.
-  **Hold Claim**
You press this button to place a Claim Line **On Hold**. It will then have a status of  **Held**. This indicates to the Contractor that you will not be **Accepting** this Claim Line until changes have been made. Before you place a Claim Line **On Hold** you must type a note in the **Hold Claim Line** dialog which opens when you press the button. You need to explain to the Contractor why you have placed the Claim line **On Hold**.
-  **Accept Claim**
You press this button to **Accept** a Claim line. It will then have a status of  **Accepted**.

-  **Reject Claim**
 You press this button to **Reject** a Claim line. It will then have a status of  **Rejected**. This indicates to the Contractor that you will not be **Accepting** this Claim line under any circumstances. Once you have **Rejected** a Claim line you must type a note in the (unnamed) **Notes** field to explain to the Contractor why.
-  **Accept All Estimates**
 You press this button to **Accept** all Estimate lines associated with the Dispatch. They will all then have the status of  **Accepted**. This button is located to the right of the tool bar where there is a drop-down list offering a list of actions which can be taken. The drop-down list button displayed will be that of the action last taken. So it may show the **Accept All Estimates** button or another from the list. If the button is not displayed you access it from the drop-down arrow.
-  **Accept All Claims**
 You press this button to **Accept** all Claim lines associated with the Dispatch. They will all then have the status of  **Accepted**. This button is located to the right of the tool bar where there is a drop-down list offering a list of actions which can be taken. The drop-down list button displayed will be that of the action last taken. So it may show the **Accept All Claims** button or another from the list. If the button is not displayed you access it from the drop-down arrow.

Map Tab

The **Map** tab displays the position of the Dispatch on the **Map**.

Map














To see how the **Map** is useful when adding a Dispatch see Adding a Maintenance Programme Dispatch (on page 332).

In the graphic above the green three is placed on the Map to show the position of the Dispatch and the fact that its Priority code is Repairs within 1 month (3).

Map Tool Bar

The following tool are accessed from the **Map** tool bar:

-  **Select Feature**
Display details of all **Map** items near selected point
-  **Add Dispatch**
Use the **Map** to add a Dispatch
-  **Move Dispatch**
Move the Dispatch from its current position
-  **Pan**
Pan around the **Map**.
-  **In**
Zoom in to the **Map**.
-  **Out**
Zoom out in the **Map**.
-  **Go to Road**
Open the **Go to Road** dialog and select a Road Name or Road ID and go to that Road.
-  **Locate the Selected Dispatch**
Return the **Map** to a position with the selected Dispatch in the centre of the panel.
-  **Refresh**
Refresh the **Map** to reflect changes made
-  **Show all Jobs**
Show all Dispatches on the **Map**, not just the selected Dispatch
-  **Show all Asset Types**
Show all Asset Types on the **Map**, not just the Asset Type for the selected Dispatch.

Multimedia Tab

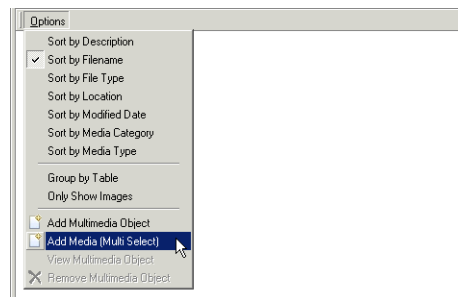
You add helpful multimedia files at the Multimedia tab. For example, you could attach some video footage or a photograph of a Road feature.

The multimedia file is stored in your **RAMM** database.

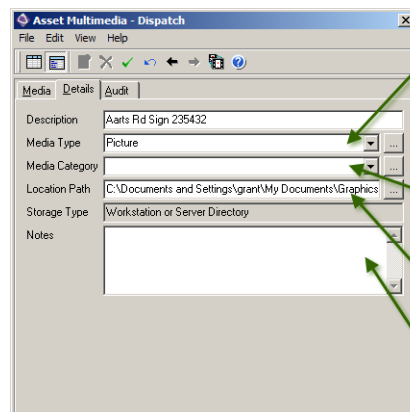
Multimedia



You have a number of options as shown in the graphic below.



Asset Multimedia for a Dispatch



You set up your own **Media Types** such as **PDF**. The default is **Picture**

You further categorise your Multimedia files with user-defined **Media Categories**

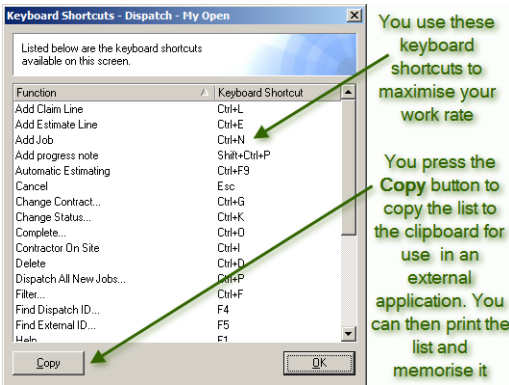
The Multimedia file itself is not saved on the **Hosting Service**, just the file **Location Path**

You can add helpful **Notes**

Keyboard Shortcuts for Dispatches

You can speed up your work rate by using keyboard shortcuts instead of using a mouse. Please find the list of keyboard shortcuts which work at the Dispatch maintenance screen.

This list is available from the screen if you follow the menu path Help > Keyboard Shortcuts. This will open the **Keyboard Shortcuts - Dispatch** screen. You can use the Copy button to copy the list to the clipboard for use in an external application if you want to print the list for your own use.



This is the full list.

Function	Keyboard Shortcut
Add Claim Line	Ctrl+L
Add Estimate Line	Ctrl+E
Add Job	Ctrl+N
Add progress note	Shift+Ctrl+P
Automatic Estimating	Ctrl+F9
Cancel	Esc
Change Contract...	Ctrl+G
Change Status...	Ctrl+K
Complete...	Ctrl+O
Contractor On Site	Ctrl+I

Function	Keyboard Shortcut
Delete	Ctrl+D
Dispatch All New Jobs...	Ctrl+P
Filter...	Ctrl+F
Find Dispatch ID...	F4
Find External ID...	F5
Help	F1
Next	Alt+N
Previous	Alt+P
Print Selected Dispatch...	Ctrl+B
Refresh	F6
Save	Ctrl+S
Show Layout	Alt+L
Show Map	F8
Transfer...	Ctrl+T
View Dispatch Transferred To	Ctrl+Alt+T

Dispatch Maintenance

The **Dispatch** maintenance screen has many standard **RAMM** maintenance functions. There are two functions which are unique to Dispatch maintenance:

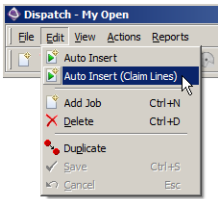
- Auto Insert Claim Lines (on page 327)
- Duplicate a Dispatch (on page 329).

An example of Dispatch maintenance is available at Adding a Maintenance Programme Dispatch (on page 332).

Auto Insert Claim Lines


Auto Insert mode is a standard **RAMM** function which can save time when you are entering many records at once into a screen. See Activating Auto Insert.

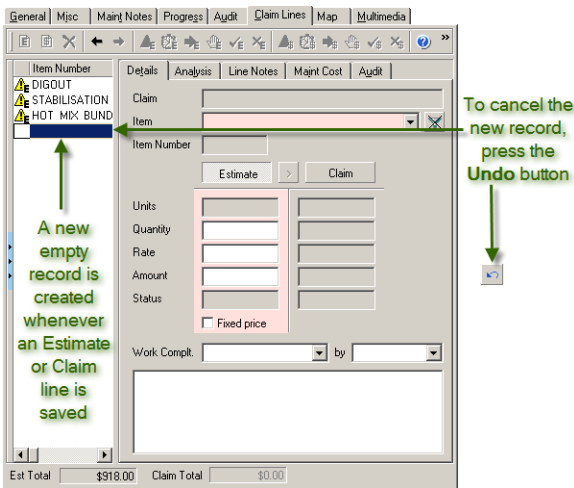
There is an Auto Insert mode which is unique to the **Dispatch** maintenance screen. You turn it on and off in the same manner as for the standard Auto Insert. You follow the menu path Edit > Auto Insert (Claim Lines) to turn it on.



It will then remain turned on for the screen until it is turned off. Closing the screen does not turn off Auto Insert (Claim Lines).

Automatic Claim and Estimate Lines

When you save an Estimate or Claim line which you have added, a new empty record is generated by **RAMM Contractor**. You complete the line in the normal manner or if it is not required, you press  Cancel Changes to delete it.



View Status


If a Dispatch is assigned to a user, and they already have a number of Dispatches assigned to them, it may not be immediately obvious when they look at the list of their assigned Dispatches that a new Dispatch has appeared. In this case you **Enable View Status** and set the **View Status** column to be visible in the (unnamed) Dispatch List panel of the **Dispatch** maintenance screen.

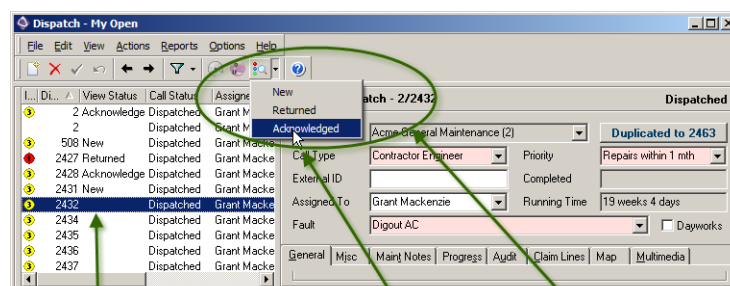
You can also set a Dispatch to **Acknowledged**. This indicates to you and others that you have noticed the Dispatch and that it is on your To-do list.

If you were once assigned a Dispatch which was then taken off you, then, if it is ever reassigned to you, it will have a status of **Returned**. You can then set its status to **Acknowledged** when it is on your To-do list.

The three available Statuses are:

- **New**
This is the Status for Dispatches and Jobs which have been assigned to you for the first time
- **Acknowledged**
You assign this Status to Dispatches and Jobs on which you are working or on which you are about to start working. Other users with the appropriate Permissions can view this Status change and see that you are dealing with the Dispatch or Job
- **Returned**
This is the Status for Dispatches and Jobs which were once assigned to you and are now reassigned to you.

When **View Status** is enabled, the **Change View Status**  button is available on the toolbar on the **Dispatch** maintenance screen and a **View Status** column is added to the (unnamed) Dispatch List panel on the same screen.



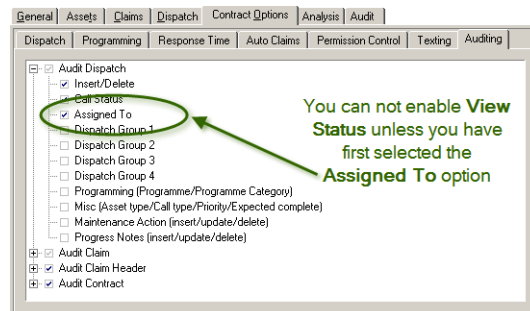
The **View Status** column displays the Dispatch Status

You select from the **Change View Status** button drop-down list, you manually change the Dispatch Status

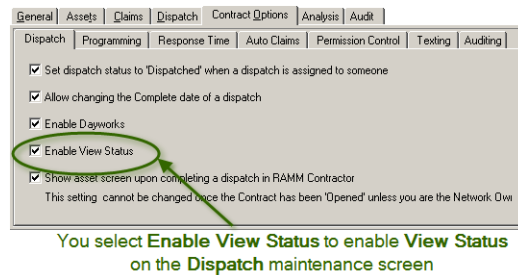
New, Returned and Acknowledged are the three available Statuses

View Status Set Up

To enable View Status you first select Assigned To under Audit Dispatch at the Auditing tab on the Contract Options tab of the **Contract Details** maintenance screen. See Setting Audit Record Options (on page 202).



You then select the Enable View Status option at the Dispatch tab on the Contract Options tab of the **Contract Details** maintenance screen. See Setting Dispatch Options (on page 179).



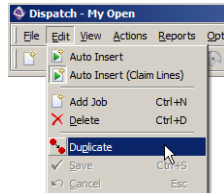
These three statuses of New, Acknowledged and Returned are also available in **Pocket RAMM**.

NOTE

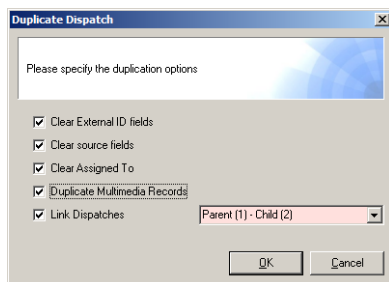
Duplicate a Dispatch

There is a Duplication function which is unique to the **Dispatch** maintenance screen. When you make a duplicate Dispatch the information in the **Details** panel, the **General** and **Misc** tabs will be duplicated by default. The Maintenance Notes, Progress Notes, Audit and Claim line information will not be replicated.

To duplicate a Dispatch, you highlight it in the (unnamed) Dispatch List panel and follow the menu path Edit > Duplicate.



This opens the **Duplicate Dispatch** screen. You select the options to ensure that only the relevant information is carried across to the new Dispatch.



Clear External ID Fields

If you select the **Clear External ID fields** check box then the External ID field on the details panel will be empty on the duplicated Dispatch.

Roading Dispatch - 2/2431		Dispatched	
Contract	Acme General Maintenance (2)		
Call Type	Staff	Priority	Repairs within 1 mth
External ID		Completed	
Assigned To	Grant Mackenzie	Running Time	2 weeks 2 days
Fault	Digout AC <input type="checkbox"/> Dayworks		

There will also be a section on the Misc tab which will have External ID information fields.

If you select the **Clear External ID fields** check box then the External ID fields on the panel will be empty on the duplicated Dispatch.

The name of the section and the field names will depend on the Call Type value.

See Miscellaneous Tab (on page 310).

Job Identifiers		Job Managers	
External ID	XYZ2001	Client	Joan Jones
Police Event No	TK010108/347	Contractor	Bill Billson

Clear Source Fields

If you select the **Clear source fields** check box then the fields on the **Caller Details** or **Reported By** sections will be empty on the duplicated Dispatch.

The name of the section and of the fields within the sections are determined by the Dispatch Call Type value.

See **Dispatch Call Types** (on page 100).

Caller Details			
First Name	Grant	Phone No.	09 123 4567
Surname	Mackenzie	Mobile No.	021 098 765

Clear Assigned To

If you select the **Clear Assigned To** check box then the **Assigned To** field on the details panel will be empty on the duplicated Dispatch.

Duplicate Multimedia Records

If you select the **Duplicate Multimedia Records** check box then any Multimedia records associated with the original Dispatch will be replicated in the duplicated Dispatch.

Link Dispatches

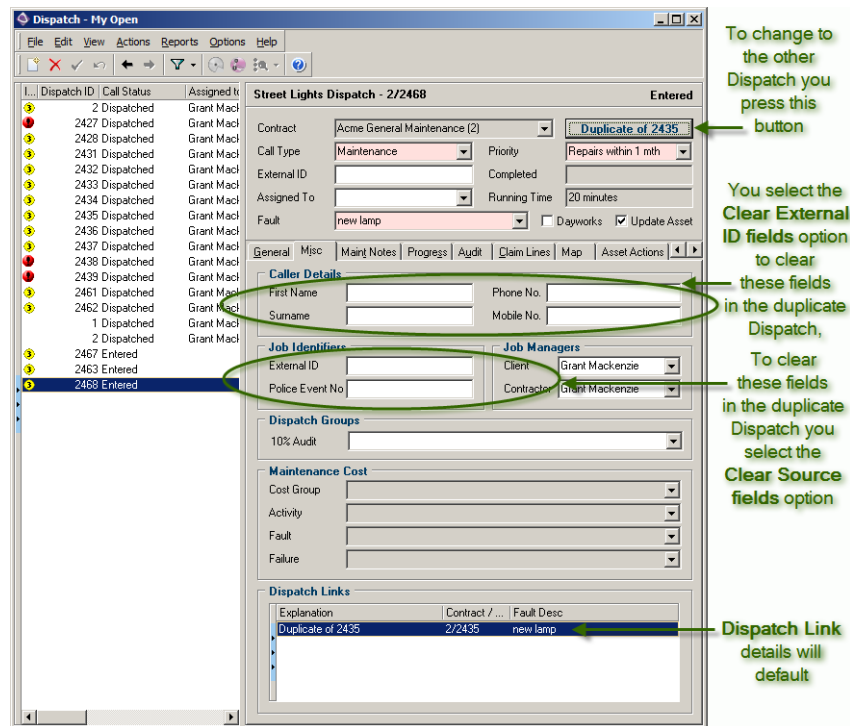
You can not duplicate a Dispatch without linking it to the duplicated Dispatch. You have the option to make the duplicate, the Child of the duplicated Dispatch by selecting **Parent (1) Child (2)** at the **Link Dispatches** drop-down list. The other option is to select **Duplicate from (1) to (2)**. Currently this makes cosmetic differences only.

Once you have created the duplicate Dispatch, buttons will appear on the **Details** panel of the duplicate and the Dispatch that was duplicated. The buttons will say:

- Parent of 2467
- Child of 2431
- Duplicated to 2468
- Duplicate of 2435.

You press the button to access the other Dispatch.

The details of the link will default into the **Dispatch Links** section of the **Misc** tab.



Adding a Maintenance Programme Dispatch

Introduction

A Dispatch is a defined activity generated from within **RAMP Contractor** so that Contractor field crew can repair a Network Fault. In **Pocket RAMP** 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.

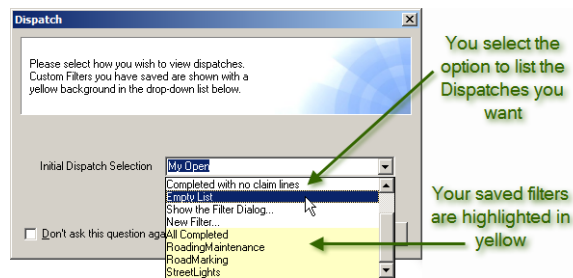
Before you do this you need to have:

- added the Maintenance Pool. You do this at the **Programme** screen. See Adding Programmes (on page 387).


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.

Dispatch ID	Call Status	Assigned To
2	Dispatched	Grant MacI
508	Dispatched	Grant MacI
2427	Dispatched	Grant MacI
2428	Dispatched	Grant MacI
2431	Dispatched	Grant MacI
2432	Dispatched	Grant MacI
2434	Dispatched	Grant MacI
2435	Dispatched	Grant MacI
2436	Dispatched	Grant MacI
2437	Dispatched	Grant MacI
2439	Dispatched	Grant MacI
2461	Started Work	Grant MacI
2462	Dispatched	Grant MacI
2470	Dispatched	Grant MacI
2472	Dispatched	Grant MacI
2473	Dispatched	Grant MacI
2478	Dispatched	Grant MacI
2479	Dispatched	Grant MacI
2480	Dispatched	Grant MacI
2481	Dispatched	Grant MacI
2484	Dispatched	Grant MacI
2485	Dispatched	Grant MacI
2486	Dispatched	Grant MacI
2	Dispatched	Grant MacI
2487	Dispatched	Grant MacI

Roading Dispatch - 2/2432

Contract: Acme General Maintenance (2) **Duplicated to 2463**

Call Type: Contractor Engineer Priority: Repairs within 1 mth

External ID: Completed: Running Time: 19 weeks 4 days

Assigned To: Grant Mackenzie Fault: Digout AC ☐ Dayworks

Location

Address: ALLCOCK RD

Feature: Side: Left Offset: 3 m

Location: 20 m

Dimensions

Length: 10 m Width: 2 m Depth: 300 mm


Quantity: 6 m3

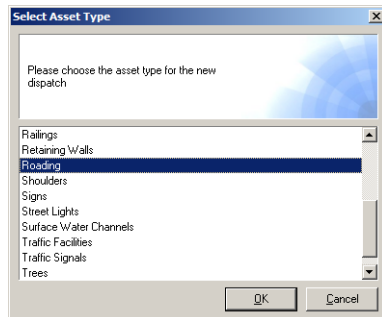
Programming


Programme: Maintenance Pool

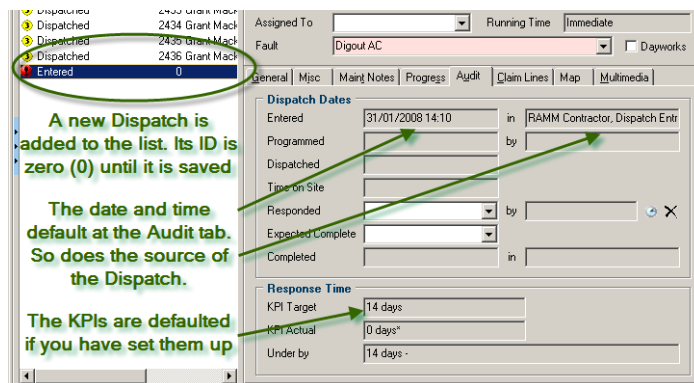
Programme Cat:

Notes

- 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.



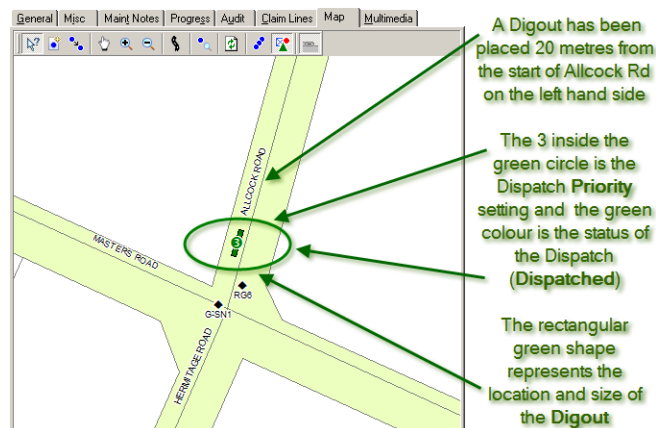
- 6 The values in the fields in the upper section will have defaulted from the previous Dispatch. If these default values are not correct for this Dispatch, select the correct ones from the Contract, Call Type, Priority, Assigned to and Fault drop-down lists. If you select Other - free form from the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




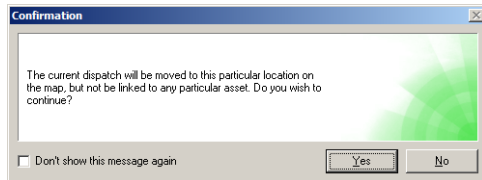
Using the Other - free form from the Fault drop-down list and typing your own Fault description in the Fault field is not recommended.
Free form Faults can not be used for Filtering or reports.

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

- 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.



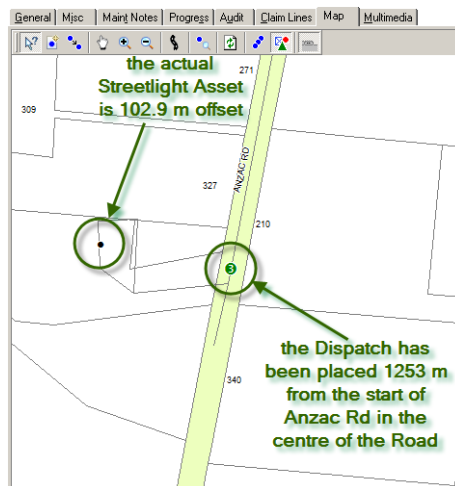
- 12 Press **Select Feature**  and place the mouse pointer over the Asset. Right-click and select **Move job to this location**. The following **Confirmation** dialog will open asking if you really want to proceed.




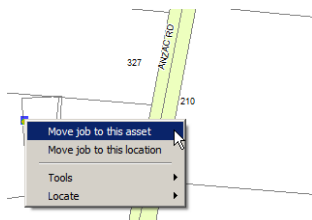
- 13 Press .

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**.

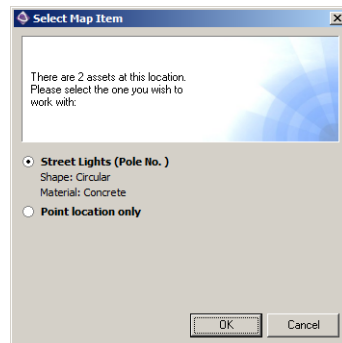


- 16 A **Confirmation** dialog will open asking if you really want to do this.

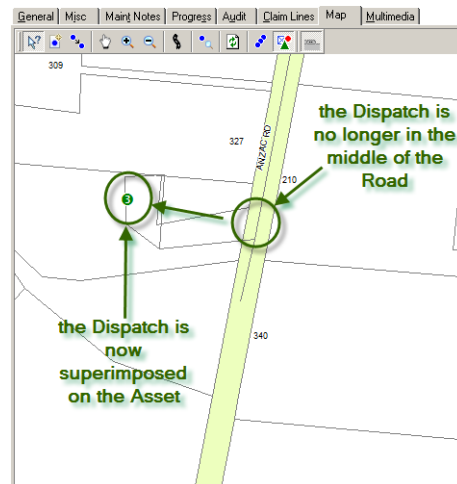
- 17 Press .

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.

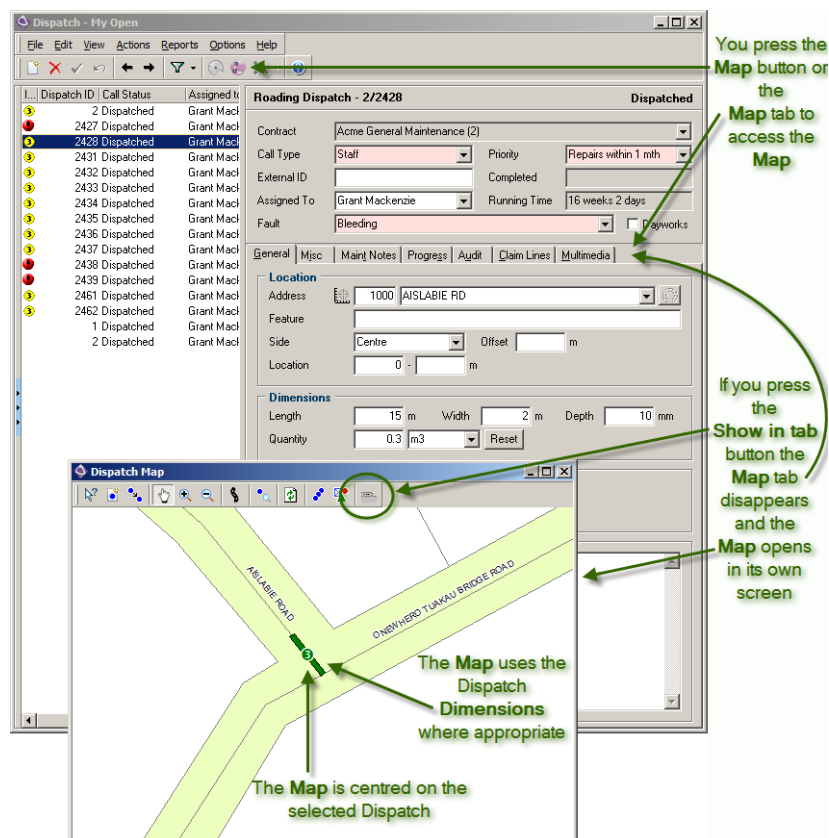
Dispatches and the Map

When you access the **Map** from the **Dispatch** maintenance screen, it opens with the highlighted Dispatch centred and displayed.

Show in Tab

The  Show in tab button is used to open the **Map** in a screen of its own. This enables you to use the **Map** while working in other areas of the **Dispatch** maintenance screen. You press the  Show in tab button a second time to return the **Map** to the Map tab.

To learn more about the **Map** refer to the Mapping chapter of the *Using RAMM* guide. To learn more about Dispatches and the **Map** see Map Tab (on page 322).



Dispatch Actions

You take actions to reflect Dispatch progress, such as when the Contractor is on site, when the Dispatch is **Complete** and to fix errors.

Contractor on Site

Contracts specify Response Times for high priority Dispatches. So you use **Contractor on site** to record the actual time the field crew arrived for work.

See **Contractor on Site** (on page 341).

Transfer the Dispatch

If two Dispatches are added for the same Job in error, you **Transfer** one Dispatch to the other. This results in only one active Dispatch while the other then has a status of **Transferred** and is then unable to be entered or edited.

See **Transfer the Dispatch** (on page 342).

Complete the Dispatch

When the Field Crew have repaired the Fault which gave rise to the Dispatch, Maintenance Notes are entered into the Dispatch which is then set to a status of **Complete**. This shows the work which was done and confirms that it is **Complete**.

See **Complete the Dispatch** (on page 343).

Change the Dispatch Status

You can change the status of a Dispatch to show its progress or for other reasons. The options you will have will depend on the current status of the Dispatch.

See **Change the Dispatch Status** (on page 344).

Link Dispatches

You can select a Dispatch and manually choose one or more Dispatches to which to link it. This is useful if you know that two or more Jobs are related to one another, but that they were not created using the **Duplicate** function. You can also use linking to indicate that there is a relationship between them. For example, a Job may have spawned a range of others each of which covers an aspect of the parent. You can see the linked Jobs from the **Misc** tab on the **Dispatch** screen.

See **Link Dispatches** (on page 344).

Automatic Estimation

You use Automatic Estimation to add preset CSIs to a Dispatch.

See Automatic Estimation (on page 346).

Update Dayworks Maintenance Cost

You may need to synchronise the Maintenance Cost values of the Dayworks Claim Lines with those of the Fault.

See Update Dayworks Maintenance Cost (on page 347).

Lock Dispatch

When there is a dispute about one or more Claim lines in a Dispatch, it may be prudent for the Contract Manager for the Contractor or for the Network Owner to lock the Dispatch. Nobody can then make any changes to it.

See Lock Dispatch (on page 348).

Lock Claim Changes

When you have completed a Dispatch, you may want to be certain that no more Claim lines are added to the Dispatch. If so, you lock the Claim changes.

See Lock Claim Changes (on page 349).

Change Dispatch to Another Contract

When you come to the end of a Contract you may have a number of Dispatches which need to be performed but can not be done within the time constraints of the current Contract. You will then need to be transfer them to the new Contract before they can be Programmed.

See Change Dispatch to Another Contract (on page 350).

Change Dispatch Asset Type

If a user has entered the details of a Dispatch incorrectly, they may have inadvertently selected the incorrect Asset Type for the Dispatch. If this is the case you must change the Asset Type.

See Change Dispatch Asset Type (on page 350).

Copy Multimedia to Asset

You can associate Multimedia files such as photographs with Dispatches. This can be useful if there is a dispute about the size or nature of the **Fault** repaired. You also have the option to associate the Multimedia files with the repaired **Asset** for future reference.

See Copy Multimedia to Asset (on page 351).

Recalculate Location

If the Location of the Dispatch has been correctly sited on the **Map** and this differs from the details in the Location field of the Dispatch, you can update the Dispatch Location from the **Map**.

See Recalculate Location (on page 352).

Recalculate Coordinates

If the GPS coordinates for the Dispatch do not match the details in the Location field, you can recalculate the GPS Coordinates using the Location field details.

See Recalculate Coordinates (on page 353).

Bulk Change Dispatches

You will often need to perform the same action on a large number of Dispatches. In these cases you will want to make changes all at once to save time.

See Bulk Change Dispatches (on page 353).

Contractor on Site

Contracts specify Response Times for high priority Dispatches. So you use **Contractor on site** to record the actual time the field crew arrived for work.

Audit Summary

RAMM Contractor keeps a record at the **Dispatch** maintenance screen **Audit** tab of significant Dispatch events. One of these is **Time on Site**. This means the time when the field crew arrived at the site, not how many hours they stayed at the site.

See Audit Tab (on page 313). See Response Time (on page 185).

Dispatch Dates	
Entered	31/01/2008 12:02:00 p.m.
Programmed	31/01/2008 by Grant Mackenzie
Dispatched	31/01/2008 12:02:00 p.m.
Time on Site	31/01/2008 12:02:00 p.m.
Responded	31/01/2008 13:02:00 p.m. Grant Mackenzie
Expected Complete	
Completed	31/01/2008 14:02:00 p.m.

KPIs

RAMM Contractor keeps a record at the **Dispatch** maintenance screen Audit tab of Response Times.

You set Response Time targets at the Calculations, Settings and Targets tabs on the Response Time tab on the Contract Options tab of the **Contract Details** screen.

See Settings (on page 187). See also Setting Response Time Options (on page 190).

Response Time	
KPI Target	14 days
KPI Actual	4 days*
Under by	10 days - Good (<50% of the target)

Pocket RAMM

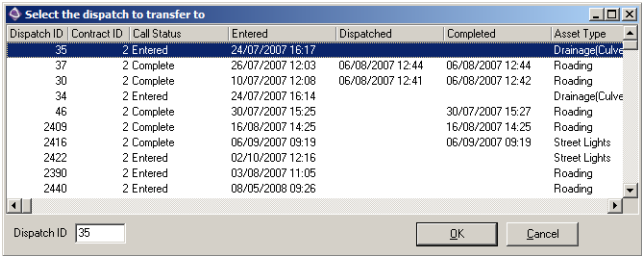
When field crew use **Pocket RAMM** to Open a Job and select Work on Job, this is the same as following the menu path Actions > Contractor on site in **RAMM Contractor**.

Transfer the Dispatch

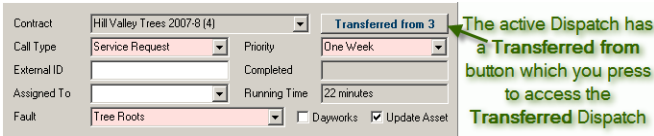
If two Dispatches are added for the same Job in error, you Transfer one Dispatch to the other. This results in only one active Dispatch while the other then has a status of Transferred and is then unable to be entered or edited.

You Transfer a Dispatch under these circumstances rather than delete the Dispatch which is not required so that a record of the error is kept. The Transferred Dispatch remains in the database but can be viewed only. It can not be Assigned to a user or entered or edited.

You Transfer one Dispatch to another by highlighting the Dispatch you want to Transfer and follow the menu path Actions > Transfer. The **Select the dispatch to transfer to** screen will open.



You then select the Dispatch to which you want to Transfer the original Dispatch and press **OK**. This Dispatch then gains a Transferred from button which you use to access the Transferred Dispatch if required.



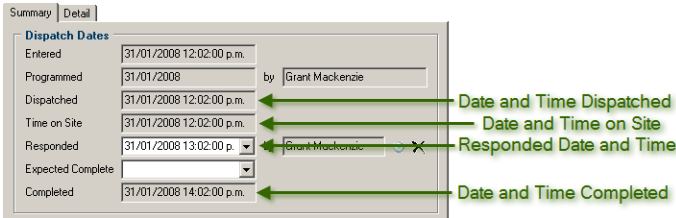
The original Dispatch now has a status of Transferred and is unable to be entered or edited. This Dispatch then gains a Transferred to button which you can use to access the Dispatch from which it was Transferred.



Complete the Dispatch

When the Field Crew have repaired the Fault which gave rise to the Dispatch, Maintenance Notes are entered into the Dispatch which is then set to a status of Complete. This shows the work which was done and confirms that it is Complete.

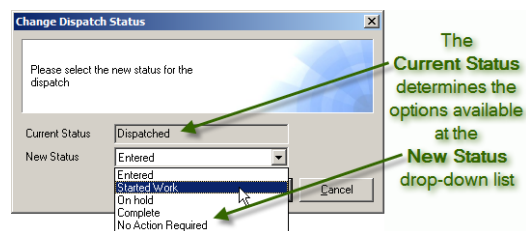
You follow the menu path Actions > Complete to change the status of a Dispatch to Complete. The time at which this occurs is recorded at the Audit tab.



Change the Dispatch Status

You can change the status of a Dispatch to show its progress or for other reasons. The options you will have will depend on the current status of the Dispatch.

You follow the menu path **Actions > Change Status** to change the status of a Dispatch. The **Change Dispatch Status** dialog will open.



The possible status values for change are

- Entered
- Dispatched
- Started Work
- Completed
- On Hold
- No Action Required.



You can not change the status of a Transferred Dispatch.

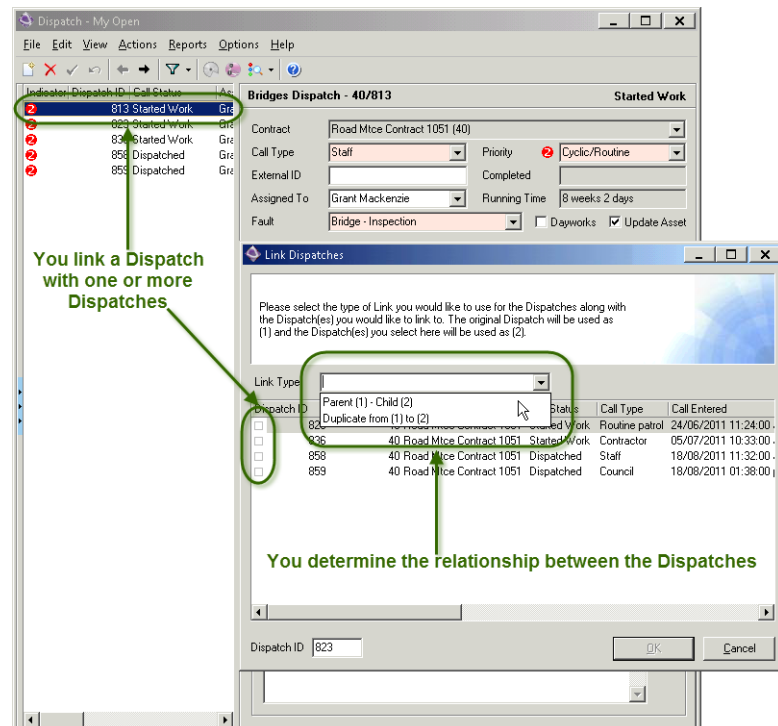
NOTE

Link Dispatches

You can select a Dispatch and manually choose one or more Dispatches to which to link it. This is useful if you know that two or more Jobs are related to one another, but that they were not created using the **Duplicate** function. You can also use linking to indicate that there is a relationship between them. For example, a Job may have spawned a range of others each of which covers an aspect of the parent. You can see the linked Jobs from the **Misc** tab on the **Dispatch** screen.

Link to One or More Dispatches

When you follow the menu path Actions > Link Dispatches > Link Dispatches you have the option of linking the Dispatch you have selected with the others in the (unnamed) Dispatch List panel.



NOTE

You must select the Dispatch relationship from the Link Type drop-down list before you can save your changes.

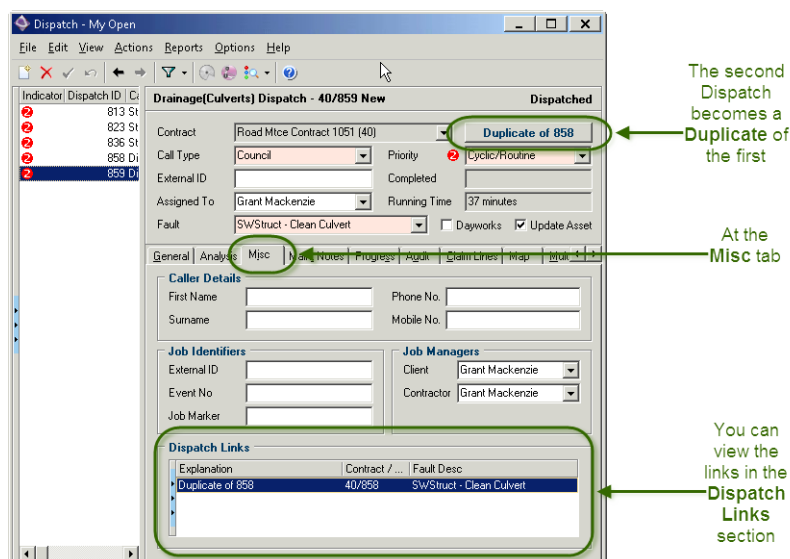
Determine the Dispatch Relationship

When you follow the menu path Actions > Link Dispatches > Link Dispatches you have the option of determining the relationship between the linked Dispatches:

- Parent (1) Child (2)
- Duplicate from (1) to (2).

A button is created showing that a relationship exists with another Dispatch. In the example below, the Dispatch is a Duplicate of 858.

At the Misc tab you can view the details of the link.



Linking Dispatches can be useful when one Job may have been Transferred to the other or one Job has spawned a range of others each of which covers an aspect of the parent.

Break the Link

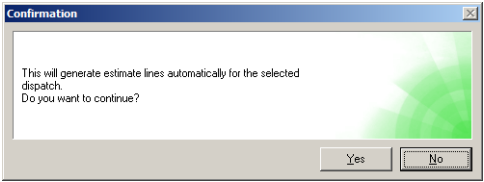
If you discover that the reason for linking the Dispatches is invalid, you break the link by selecting one of the linked Dispatches and following the menu path **Actions > Link Dispatches > Unlink Dispatches**. This is useful if you know that two Jobs have been related to one another but subsequently found to be unrelated.


Automatic Estimation

You use Automatic Estimation to add preset CSIs to a Dispatch. This saves time and improves Estimation accuracy.

You set up Automatic Estimation when you set up the Contract. See Introduction to Auto Claiming (on page 260).

To add Estimate lines to a Dispatch you follow the menu path **Actions > Automatic Estimating**. A **Confirmation** screen will open.



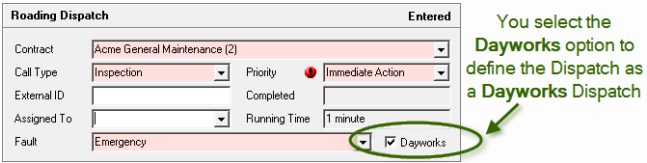
You press  to add the Estimate lines.

Update Dayworks Maintenance Cost

You may need to synchronise the Maintenance Cost values of the Dayworks Claim Lines with those of the Fault.

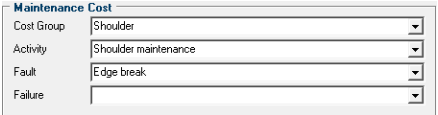
When you add a Dispatch, you have the option to define it as Dayworks. You do this by selecting the Dayworks check box.

See Details Panel (on page 303).

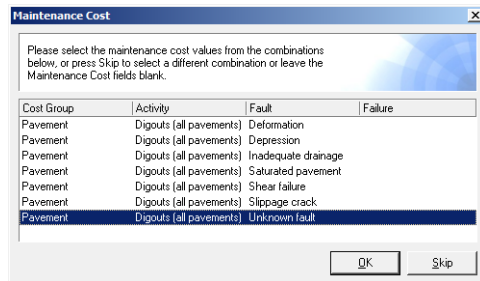


When you have defined a Dispatch as Dayworks, the Maintenance Cost section of the Analysis tab on the **Dispatch** maintenance screen becomes available.

See Miscellaneous Tab (on page 310).



If you have set up your Maintenance Costs so that they default, the Dayworks Maintenance Costs will default into the Maintenance Cost section on the Misc tab. If not the **Maintenance Cost** dialog will open and you can then select the appropriate values.

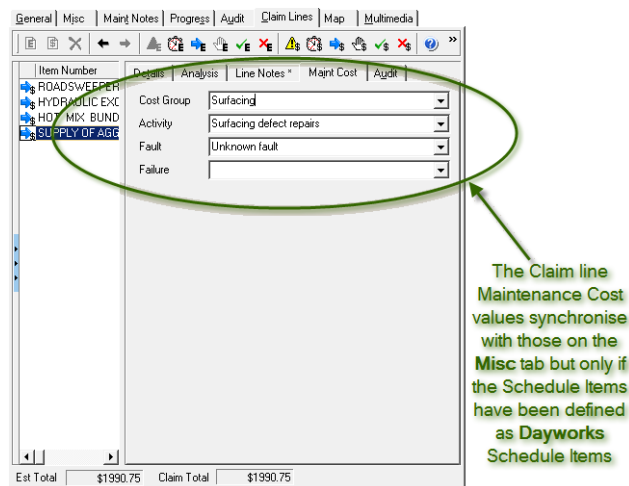


Please select the maintenance cost values from the combinations below, or press Skip to select a different combination or leave the Maintenance Cost fields blank.

Cost Group	Activity	Fault	Failure
Pavement	Digouts (all pavements)	Deformation	
Pavement	Digouts (all pavements)	Depression	
Pavement	Digouts (all pavements)	Inadequate drainage	
Pavement	Digouts (all pavements)	Saturated pavement	
Pavement	Digouts (all pavements)	Shear failure	
Pavement	Digouts (all pavements)	Slippage crack	
Pavement	Digouts (all pavements)	Unknown fault	

OK Skip

You follow the menu path **Actions > Update Dayworks Maint Cost** to update the Maintenance Costs of the Claim lines associated with a Dayworks Dispatch so that they are synchronised with the Maintenance Cost values at the **Misc** tab.



The screenshot shows the 'Claim Lines' tab in the 'Maintenance Cost' section. A green oval highlights the dropdown menus for 'Cost Group', 'Activity', 'Fault', and 'Failure'. A green arrow points from a text box to this area.

The Claim line Maintenance Cost values synchronise with those on the **Misc** tab but only if the Schedule Items have been defined as **Dayworks** Schedule Items

Est Total \$1990.75 Claim Total \$1990.75

The Maintenance Cost values of the Claim lines will synchronise only if they have been defined as Dayworks at the Item Type drop-down list on the General section of the General tab on the **Contract Schedule Items** maintenance screen. See CSI General Parameters (on page 234).

Lock Dispatch

When there is a dispute about one or more Claim lines in a Dispatch, it may be prudent for the Contract Manager for the Contractor or for the Network Owner to lock the Dispatch. Nobody can then make any changes to it.

Only the people named in the Contract Manager fields in the Contract Managers section of the General tab of the **Contract Details** screen can lock a Dispatch.

The **Contract Manager** fields hold the names of the only two persons who may lock or unlock a Dispatch

There is no specific Staff Permission at the Detail tab of the **Staff Permissions** maintenance screen to enable or disable the right to lock a Dispatch.

Defining a user as Contract Manager at the Groups tab of the **Staff Permissions** maintenance screen does not give a user the right to lock a Dispatch.

Gillian Gillette, although given Permissions of a **Contract Manager** can not lock Dispatches as she is not named **Contract Manager** on the **Contract Details** screen

You follow the menu path Actions > Lock Dispatch to lock a Dispatch. When a Dispatch has been locked, the fields of the Dispatch become unable to be entered or edited until the Dispatch is unlocked. A Locked icon then appears adjacent to the Dispatch in the (unnamed) Dispatch List panel.

The only people who can unlock a Dispatch are the same two who can lock it. If a locked Dispatch is unlocked and changes made to the Dispatch, **RAMM Contractor** creates an audit trail of who unlocked the Dispatch and of the changes made.



If you are not named as a Contract Manager in the Contract the menu option will not be available. This is the case even if you have Full Control Permissions over the Contract.

Lock Claim Changes

When you have completed a Dispatch, you may want to be certain that no more Claim lines are added to the Dispatch. If so, you lock the Claim changes.

You follow the menu path **Actions > Lock Claim Changes** to lock the Claim changes for a Dispatch. A **Locked** icon then appears adjacent to the Dispatch in the (unnamed) **Dispatch List** panel.

When a Dispatch has had its Claim line changes locked, no more Claim or Estimate lines can be added to the Dispatch until the Dispatch Claim lines are unlocked.

To unlock the Claim changes for a Dispatch, you follow the menu path **Actions > Lock Claim Changes**.



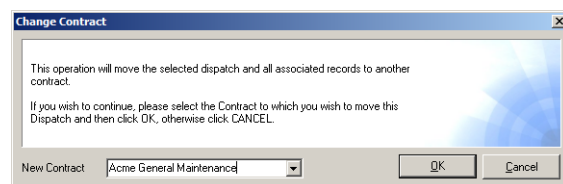
You can not lock the Claim changes for a Dispatch unless it has a status of **Completed**.


Locking Claim changes can also be very useful when preparing a Claim Header.

Change Dispatch to Another Contract

When you come to the end of a Contract you may have a number of Dispatches which need to be performed but can not be done within the time constraints of the current Contract. You will then need to be transfer them to the new Contract before they can be Programmed.

You follow the menu path **Actions > Change Contract** to open the **Change Contract** dialog at which you select the new Contract for the Dispatch.



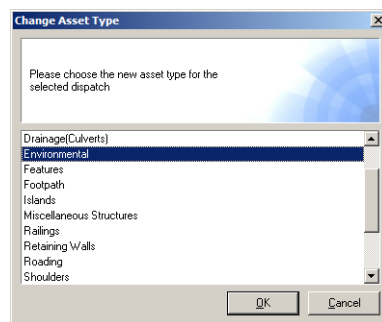
You then press  and the Dispatch is transferred to the new Contract.

Change Dispatch Asset Type

If a user has entered the details of a Dispatch incorrectly, they may have inadvertently selected the incorrect Asset Type for the Dispatch. If this is the case you must change the Asset Type.

An example of when this might occur could be if you had a User Defined Table (UDT) for General Maintenance with a fault of Litter Removal. A user might add a Dispatch for this and when the Field Crew arrive to do the work it is a large tree fallen on the Road. This then should be a Dispatch of Asset Type Environmental with a Fault of Clear Debris.

In this situation you follow the menu path **Actions > Change Asset Type** to open the **Change Asset Type** dialog from which you select the correct Asset Type.



When you are returned to the **Dispatch** maintenance screen you will need to update the Dispatch Fault and any other relevant details.

Copy Multimedia to Asset

You can associate Multimedia files such as photographs with Dispatches. This can be useful if there is a dispute about the size or nature of the Fault repaired. You also have the option to associate the Multimedia files with the repaired Asset for future reference.

You can only associate Dispatch Multimedia files with an Asset if the Asset exists in the Dispatch and you have **Update** rights for the Asset table.

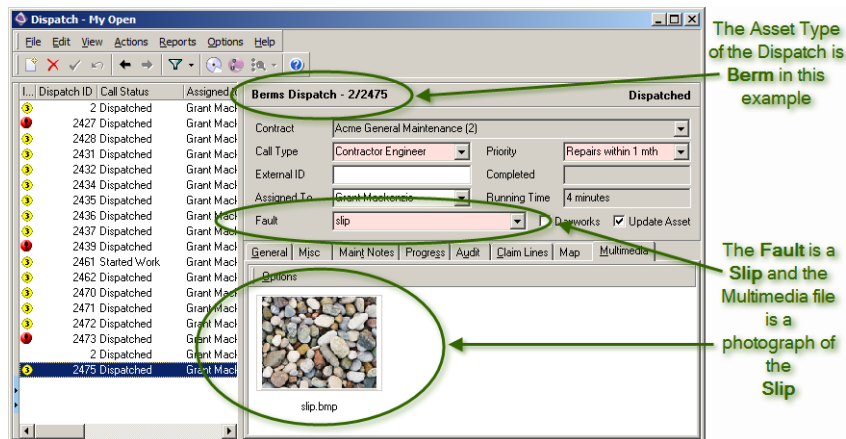


To make Asset details default into the Asset section on the General tab of the **Dispatch** maintenance screen, you must select the Asset for the Dispatch from the **Map**.

If the Asset exists, its details will display in the Asset section on the General tab of the **Dispatch** maintenance screen.



You then associate a Multimedia file with the Dispatch.

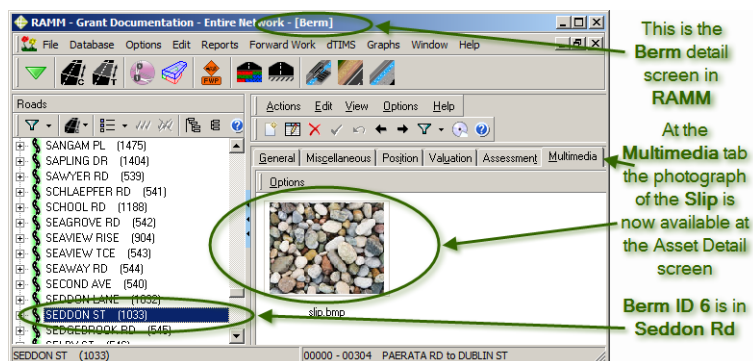


Now that you have an identified Asset and a Multimedia file associated with the Dispatch, you follow the menu path **Actions > Copy Multimedia to Asset**.

A **Confirmation** screen will open asking if you really want to do this.

When you have pressed **Yes** the Multimedia file will be copied to the Asset, in this case the Berm.

Now the Multimedia file will be attached to the Asset. This makes it available to **RAMM** users outside of **RAMM Contractor**. It becomes available at the Multimedia tab of the Asset Detail screen. In the example below it is the Berm Detail screen for Asset ID 6.



Recalculate Location

If the Location of the Dispatch has been correctly sited on the **Map** and this differs from the details in the Location field of the Dispatch, you can update the Dispatch Location from the **Map**.

You follow the menu path Actions > Recalculate Location.

Recalculate Coordinates

If the GPS coordinates for the Dispatch do not match the details in the Location field, you can recalculate the GPS Coordinates using the Location field details.

You follow the menu path Actions > Recalculate Coordinates.


Bulk Change Dispatches

You will often need to perform the same action on a large number of Dispatches. In these cases you will want to make changes all at once to save time.

Before you perform a Bulk Change, you should apply a filter to the **Dispatch** maintenance screen so that the (unnamed) Dispatch List panel includes all the Dispatches to which you want to make changes.

You follow the menu path Actions > Bulk Change to open the **Dispatch Bulk Change Dispatch Selection** screen. All of the Dispatches from the (unnamed) Dispatch List panel will be listed and selected.

Dispatch ID	Call Status	Dispatched	Completed
<input checked="" type="checkbox"/> 502	Entered		
<input checked="" type="checkbox"/> 503	Entered		
<input checked="" type="checkbox"/> 504	Entered		
<input checked="" type="checkbox"/> 505	Entered		
<input checked="" type="checkbox"/> 506	Entered		
<input checked="" type="checkbox"/> 507	Entered		
<input checked="" type="checkbox"/> 508	Entered		
<input checked="" type="checkbox"/> 509	Entered		
<input checked="" type="checkbox"/> 510	Entered		
<input checked="" type="checkbox"/> 511	Entered		
<input checked="" type="checkbox"/> 512	Entered		
<input checked="" type="checkbox"/> 513	Entered		

Clear those Dispatches which you do not want to Bulk Change and press  to open the **Dispatch Bulk Change Change** screen.

Dispatch Bulk Change Step 2 of 3

Select the change(s) you wish to apply to the selected dispatches:

☒ **Update Column**

Column: Assigned To
Value: Grant Mackenzie

☒ **Update Column**

Column: Dispatch Priority
Value: Repairs within 1 mth

☐ **Update Column**

Column:
Value:

Back Next Finish Help Cancel

You select the **Update Column** check box to make available each **Update Column** section you require. In the example above, the Dispatches are all being Assigned To one user and the Dispatch Priority is being set to Repairs within 1 mth.

When you have made your selections you press **Next** to open the **Dispatch Bulk Change Summary** screen. It will display a description of the changes you are about to make and say how many Dispatches are about to be changed if you proceed.

If the changes do not match your requirements you press **Back** and update the values until they do. Otherwise press **Finish** to commit the Bulk Change.

Dispatch Bulk Change Step 3 of 3

Summary

Summary of changes to be made:

For dispatches matching the current filter on the Acme General Maintenance contract (2):

- Set Assigned To to Grant Mackenzie
- Set Dispatch Priority to Repairs within 1 mth

This change will affect 26 dispatches

Click Finish to apply these changes.

Back Next Finish Help Cancel

Dispatch Reports

The reports which you run from the **Dispatch** maintenance screen are mostly available elsewhere. You run them from the **Dispatch** maintenance screen to limit the results to data from the Dispatches in the (unnamed) Dispatch List panel.

Print Dispatches

The Dispatch Report is a highly configurable report for printing Dispatch data. You use it to list and group virtually any Dispatch data.

See Print Dispatches (on page 356).

Dispatch Analysis Report

The Dispatch Analysis report is a Decision Cube which you can use to manipulate Dispatch data for reporting purposes. It generates an analysis of Dispatches by Call Status and Call Type by default but you can reconfigure this.

See Dispatch Analysis Report (on page 357).

Claim/Estimate Analysis Report

The Claim/Estimate Analysis report is a Decision Cube which you can use to manipulate Claim and Estimate data for reporting purposes. It generates an analysis by Claim Year, Claim Amount and Claim Quantity by default.

See Claim/Estimate Analysis Report (on page 358).

Dispatch Report (Grid)

The **Dispatch Report (Grid)** is a highly configurable report for listing and grouping Dispatch data for export in a number of formats for use outside **RAMM Contractor**. Each line of data in the report is for one Dispatch.

See Dispatch Report (on page 359).

Claim Line Grid Report

The **Claim Grid (Claim Lines)** report is a highly configurable report for listing and grouping Claim line data for export in a number of formats for use outside **RAMM Contractor**. Each line of data in the report is for one Claim line.

See Claim Line Grid Report (on page 359).

Special Purpose Dispatch Reports

Special Purpose reports in **RAMM Contractor** are those which are specific to one customer. So whilst they are available they represent a solution which may suit only the one customer for whom they were scripted. Use these reports with care.

See Special Purpose Dispatch Reports (on page 360).

Job Sheets

You run the Job Sheet report to print a Dispatch report or Job Sheets. This has most relevance for users who use a paper-based system rather than **Pocket RAMM**.

See Job Sheets (on page 363).

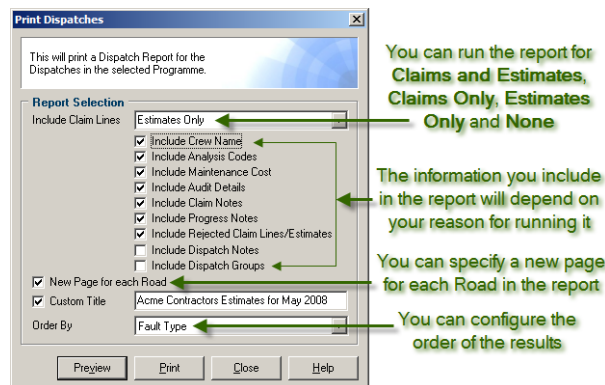
Print Dispatches

The Dispatch Report is a highly configurable report for printing Dispatch data. You use it to list and group virtually any Dispatch data.

Print Dispatches

Reports similar to the Dispatch Report are available elsewhere. You run this report from the **Dispatch** maintenance screen to limit the results to data from a particular set of Dispatches in the (unnamed) Dispatch List panel.

From the **Dispatch** maintenance screen you follow the menu path Reports > Print Dispatches to open the **Print Dispatches** dialog.



Include Claim Lines

Normally you would run the report for Estimates Only. Your options are:

- Claims and Estimates
- Claims Only
- Estimates Only
- None.

Information Options

There are a number of options which you can select to determine the report results. For instance, if you were interested in which Field Crews were going to perform which tasks you would select Include Crew Name.

New Page for Each Road

You have the option to have the report group the results by Road name and to have the results related to each Road start a new page. You would do this in conjunction with Include Crew Name to be sure that you were not sending more than one crew to the same Road.

Custom Title

You have the option to define your own report header.

Order By

You can determine the order of the results.

CJN Technologies Limited Hill Valley Council		User: Grant Mackenzie Page: 1 Printed: Wednesday, 28 May 2008 10:39		
Dispatch Report For selected dispatches - Ordered by Fault Type				
Dispatch	Call Entered	Location	Call Completed	
2/500	03/08/2007 11:38	2 AKA AKA - CHURCH RD, AWHITU WARD [6] (183m), Right	14/08/2007 12:01	
Response: 1 week 4 days		3 (Repairs within 1 mth)		
Asset Type: Roading		Call Type: Staff		
Length: 9.0m Width: 3.0m Depth: 150.0mm		Volume: 4.05m3		
Fault: Digout AC				
Crew Name: Grant Mackenzie				
Progress Notes				
13/08/2007 10:44	grant	Priority was changed to Repairs within 1 mth (3)		
13/08/2007 11:28	grant	Status was changed to Dispatched (D)		
13/08/2007 11:28	grant	Assigned to was changed to Grant Mackenzie		
14/08/2007 12:01	grant	Status was changed to Complete (C)		
Item		Work Completed Units	Qty. Rate (\$ Est Amount) Status	
B2.1	DIGOUT	14/08/2007 m2	27x 25.00 = 675.00	Accepted
Crew Name: Grant Mackenzie				
Maintenance Cost: Pavement, Digouts (all pavements), Saturated pavement				
Audit Details: Estimate Presented: 13/08/2007 by Grant Mackenzie, Accepted: 13/08/2007 by Grant Mackenzie Gaim Maintained: 14/08/2007 by Grant Mackenzie, Presented: 16/08/2007 by Grant Mackenzie, Accepted: 16/08/2007 by Grant Mackenzie				

Dispatch Analysis Report

The Dispatch Analysis report is a Decision Cube which you can use to manipulate Dispatch data for reporting purposes. It generates an analysis of Dispatches by Call Status and Call Type by default but you can reconfigure this.

You run the report from the **Dispatch** maintenance screen to limit the results to data from only the Dispatches listed in the (unnamed) Dispatch List panel. This report is also available from the **RAMM Contractor** main screen. When run from that screen, the **Dispatch Analysis** selection criteria screen opens. You use this to limit the Dispatches on which to report.

You follow the menu path Reports > Analysis > Dispatch Analysis to open the **Dispatch Analysis** Decision Cube.

Call Status	Fault		Financial Year Completed		Alligator Cra		Bleeding		Cover Plate		Digout AC		Edge Break		Edgebreak		Lamp Out	
	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	
Dispatched	1.00	1.00	2.00	2.00	1.00	1.00	7.00	7.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	3.00	3.00	
Started Work	1.00	1.00																
Total	2.00	2.00	2.00	2.00	1.00	1.00	7.00	7.00	1.00	1.00	1.00	1.00	1.00	1.00	3.00	3.00		

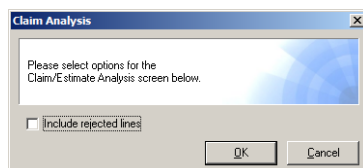
Claim/Estimate Analysis Report

The Claim/Estimate Analysis report is a Decision Cube which you can use to manipulate Claim and Estimate data for reporting purposes. It generates an analysis by Claim Year, Claim Amount and Claim Quantity by default.

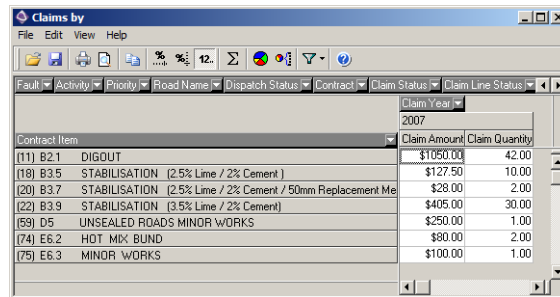
This report is available from the:

- **RAMM Contractor** main screen
when run from this screen Claim lines from a one or more selected Contracts are available
- **Claim** screen
when run from this screen, only the Claim lines associated with the highlighted Claim Header are available for analysis
- **Dispatch** maintenance screen
when run from this screen only the Claim lines associated with the particular set of Dispatches in the (unnamed) Dispatch List panel are available for analysis.

You follow the menu path Reports > Analysis > Claim/Estimate Analysis to open the **Claim Analysis** selection criteria screen.



Once you have decided whether to select the Include rejected lines option you press **OK** to open the **Claims by Decision Cube**.

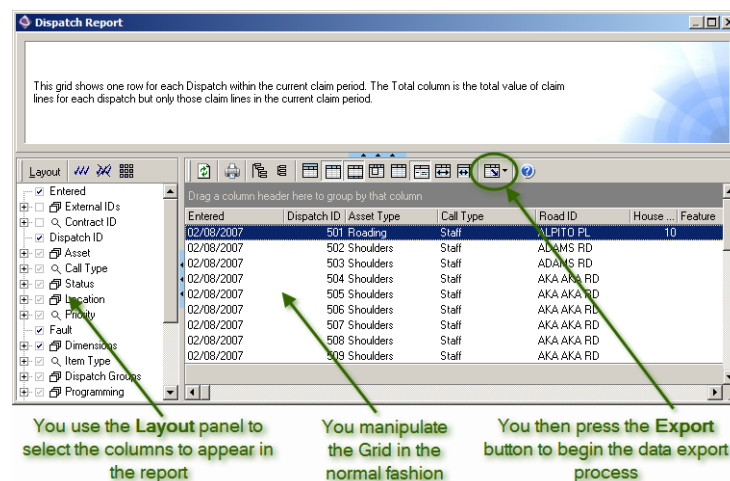


Contract Item	Claim Amount	Claim Quantity
(11) B2.1 DIGOUT	\$1050.00	42.00
(18) B3.5 STABILISATION (2.5% Lime / 2% Cement)	\$127.50	10.00
(20) B3.7 STABILISATION (2.5% Lime / 2% Cement / 50mm Replacement Me	\$28.00	2.00
(22) B3.9 STABILISATION (3.5% Lime / 2% Cement)	\$405.00	30.00
(59) D5 UNSEALED ROADS MINOR WORKS	\$250.00	1.00
(74) E6.2 HOT MIX BUND	\$80.00	2.00
(75) E6.3 MINOR WORKS	\$100.00	1.00

Dispatch Report

The **Dispatch Report (Grid)** is a highly configurable report for listing and grouping Dispatch data for export in a number of formats for use outside **RAMM Contractor**. Each line of data in the report is for one Dispatch.

From the **Dispatch** maintenance screen you follow the menu path Reports > Dispatch Report to open the **Dispatch Report** which is in a Grid.



This grid shows one row for each Dispatch within the current claim period. The Total column is the total value of claim lines for each dispatch but only those claim lines in the current claim period.

Layout Panel: You use the Layout panel to select the columns to appear in the report.

Grid: You manipulate the Grid in the normal fashion.

Export Button: You then press the Export button to begin the data export process.

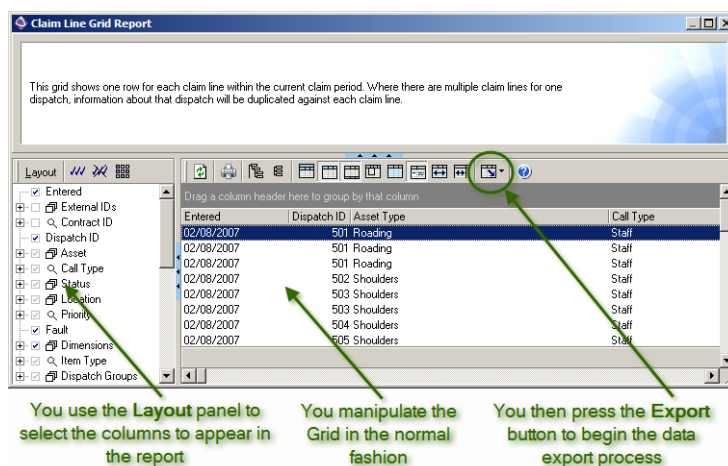
Entered	Dispatch ID	Asset Type	Call Type	Road ID	House ...	Feature
02/08/2007	501	Roadings	Staff	ALPITO PL		10
02/08/2007	502	Shoulders	Staff	ADAMS RD		
02/08/2007	503	Shoulders	Staff	ADAMS RD		
02/08/2007	504	Shoulders	Staff	AKA AKA RD		
02/08/2007	505	Shoulders	Staff	AKA AKA RD		
02/08/2007	506	Shoulders	Staff	AKA AKA RD		
02/08/2007	507	Shoulders	Staff	AKA AKA RD		
02/08/2007	508	Shoulders	Staff	AKA AKA RD		
02/08/2007	509	Shoulders	Staff	AKA AKA RD		

Claim Line Grid Report

The **Claim Grid (Claim Lines)** report is a highly configurable report for listing and grouping Claim line data for export in a number of formats for use outside **RAMM Contractor**. Each line of data in the report is for one Claim line.

Configure and Export Claim Line Data

From the **Dispatch** maintenance screen you follow the menu path Reports > Claim Line Grid Report to open the **Claim Line Grid Report** which is in a Grid.



Special Purpose Dispatch Reports

Special Purpose reports in **RAMM Contractor** are those which are specific to one customer. So whilst they are available they represent a solution which may suit only the one customer for whom they were scripted. Use these reports with care. They are:

- Duplicate External ID Report**
 You run the Duplicate External ID report to generate a list of External IDs that have been used in more than one Dispatch. If you reuse External IDs you use this report to group Dispatches by External ID. If you assign unique External IDs to each dispatch, you run this report to ensure that work has not been duplicated.
 See Duplicate External ID Report (on page 361).
- Dispatch Sign Information Report**
 You run the Dispatch Sign Information report to place Sign information from a group of Dispatches into a Grid for data manipulation, printing and export.
 See Dispatch Sign Information Report (on page 361).
- Road Inspection Report**
 You run the Road Inspection report to list Roads where Dispatches have been Completed within a defined date range or those where none have been Completed.
 See Road Inspection Report (on page 361).

Duplicate External ID Report

You run the Duplicate External ID report to generate a list of External IDs that have been used in more than one Dispatch. If you reuse External IDs you use this report to group Dispatches by External ID. If you assign unique External IDs to each dispatch, you run this report to ensure that work has not been duplicated.

You follow the menu path Reports > Special Purpose > Duplicate External ID Report to open the **Duplicate External ID Report** Grid. You can then manipulate the Grid and print or export the report.

External ID	Dispatch ID	Call Status	First Dispatch Completed	First Dispatch Completed
123123124	507	Entered	2460	20/05/2008 11:26
123123124	508	Entered	2460	20/05/2008 11:26
SUSAN	513	Entered	514	14/08/2007 12:02
SUSAN	515	Entered	514	14/08/2007 12:02
SUSAN	518	Entered	514	14/08/2007 12:02
SUSAN	516	Entered	514	14/08/2007 12:02
SUSAN	517	Entered	514	14/08/2007 12:02

Dispatch Sign Information Report

You run the Dispatch Sign Information report to place Sign information from a group of Dispatches into a Grid for data manipulation, printing and export. You run the Dispatch Sign Information report from within the **Dispatch** maintenance screen to limit the results to data from a particular set of Dispatches in the (unnamed) Dispatch List panel.

You follow the menu path Reports > Special Purpose > Dispatch Sign Info to open the **Dispatch Sign Information Report** screen. You can then manipulate the data in the Grid before printing or exporting the report.

Contract ID	Dispatch ID	Notes	Maint Notes	Type	Width	Legend Note	Reverse	M...
Contract Signs 2005/08	39		requires complete installation 76 EX1T) g/socket and pole to fit	STREET NAME (NO EX1T)	630	KIWI CT	KIWI CT	
Contract Signs 2005/08	40		requires complete installation 76 EX1T) g/socket and pole to fit	STREET NAME (NO EX1T)	930	CHERTSEY CT	CHERTSEY CT	
Contract Signs 2005/08	41	waiting on snp & no exit	waiting on snp & no exit	STREET NAME (NO EX1T)	760	SILVERDALE CT 415 Ruahine st	SILVERDALE CT 415 Ruahine st	
Contract Signs	42	sign was		STREET	720	RUAHINE ST		

Road Inspection Report

You run the Road Inspection report to list Roads where Dispatches have been Completed within a defined date range or those where none have been Completed.

You run the Road Inspection report from within the **Dispatch** maintenance screen to limit the results to data from a particular set of Dispatches in the (unnamed) Dispatch List panel.

You follow the menu path Reports > Special Purpose > Road Inspection Report to open the **Road Inspection Report** selection screen.

Roads with No Dispatches Completed

You have two diametrically opposed options of displaying Roads with no dispatches completed or Roads with dispatches completed.

Date Range

You select a start date and an end date for the range of dates between which Dispatches were - or were not - Completed on the Roads. You do this from the two Date Range drop-down calendars.


Contract

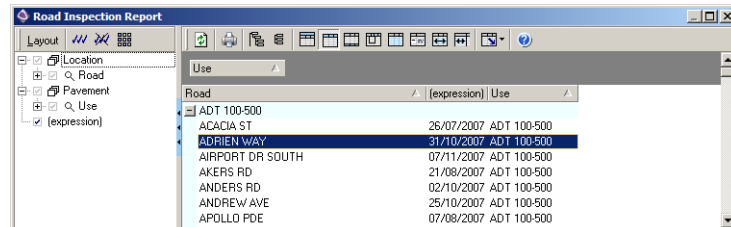
If the range of Dispatches in the (unnamed) Dispatch List panel are associated with a variety of Contracts, you must select one Contract at the Contract drop-down list.

Analyse by

You analyse the Roads by one of the following parameters:

- Area
- Hierarchy
- Maintenance Group
- Pavement Type
- Pavement Use
- Road Group
- Ring Road.

When you have made your selections you press  to open the **Road Inspection Report** screen. You can then manipulate the data in the Grid before printing or exporting the report.



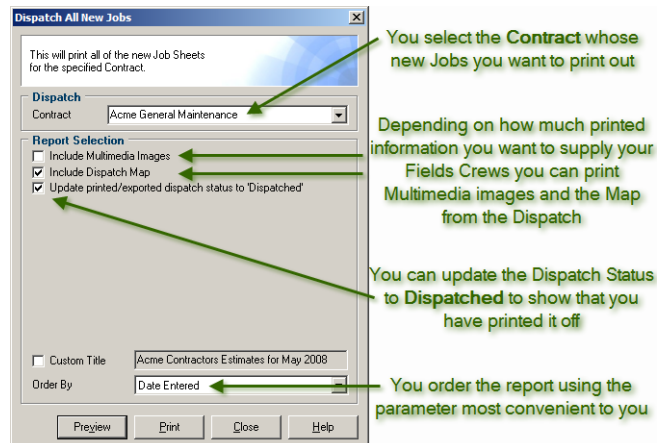
Job Sheets

You run the Job Sheet report to print a Dispatch report or Job Sheets. This has most relevance for users who use a paper-based system rather than **Pocket RAMM**.

You have three Job Sheet options.

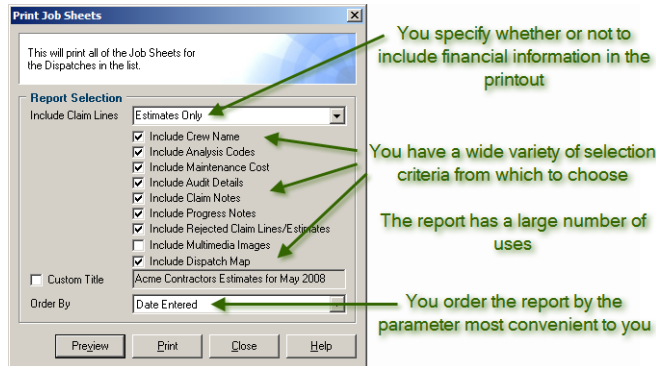
Dispatch All New Jobs

You follow the menu path Reports > Job Sheets > Dispatch All New Jobs to open the **Dispatch All New Jobs** selection screen. When you have made your selections you run the report, not only for the particular set of Dispatches in the (unnamed) Dispatch List panel but for all new Dispatches for the Contract.



All Jobs in the List

You follow the menu path Reports > Job Sheets > All Jobs in List to open the **Print Job Sheets** selection screen. When you have made your selections you run the report, only for the particular set of Dispatches in the (unnamed) Dispatch List panel.



Print Selected Dispatch

You follow the menu path Reports > Job Sheets > Print Selected Dispatch to print a Job Sheet for the Dispatch you have selected in the (unnamed) Dispatch List panel. The status of the Dispatch will change to Dispatched.

C.J.N Technologies Limited Hill Valley District Council		User: Grant Mackenzie Page: 1 Printed: Wednesday, 28 May 2008 15:09	
Job Sheet			
Acme General Maintenance			
Dispatch:	508 (Ext ID: 123 123 124) / Response Time: 300 15:09		3 (Repairs)
Call Entered:	02/08/2007 00:00 Thursday		
Location:	AKA AKA RD, PATUMAHOE / AWHITU WARD [4] (2437m), Left		
Length:	10.0m	Width: 1.0m	Quantity: 10.0
Asset Type:	Shoulders		
Reported By:	Fault: Edgebreak	Likely ID:	Call Type: Staff
Crew Name:	Grant Mackenzie		

Dispatch Options

Before you work in the **Dispatch** maintenance screen you should set it up so you are as efficient as possible.

You may also need to set it up to match your role and your work practices. You can change the screen display and also the default records which will be available under a variety of circumstances. You can also set individual preferences and use the Actions menu to find Dispatches.

Show Contract Number in List

If your Dispatches are associated with number of different Contracts, it is possible to have several Dispatches with the same Dispatch ID such as 23. You display the Contract Number with the Dispatch ID to differentiate the Dispatches.

See Show Contract Number in List (on page 366).

Show Address in List

You may want to print or export a list of Dispatches which includes the Addresses for the Faults. You will then need to show the Address in the list.

See Show Address in List (on page 367).

Show All Dispatch and Audit Records

You may want to display all the audit records for a Dispatch in one place. If so you need to Show all Dispatch and Audit Records.

See Show All Dispatch and Audit Records (on page 368).

Limit Transfer List to Thirty Days

When you Transfer one Dispatch to another, you select the Dispatch from a list that includes all open Dispatches. You may want to shorten the list.

See Limit Transfer List to Thirty Days (on page 369).

Limit Patrol List to Three Months

When you associate a Patrol with a Dispatch you select the Patrol from a list of all Patrols. You may want to shorten the list.

See Limit Patrol List to Three Months (on page 370).

Show Closed Contracts

Normally the list of Dispatches in the (unnamed) Dispatch List panel contains only Dispatches from Current Contracts. In unusual circumstances, you may need to show Dispatches from Closed Contracts as well.

See Show Closed Contracts (on page 371).

Dispatch Preferences

You can make the **Dispatch** maintenance screen behave according to your preferences to increase your productivity. You can also set Asset link preferences for some Asset Types.

See Dispatch Preferences (on page 372).

Dispatch Filter Options

In order to work effectively at the **Dispatch** maintenance screen you need to apply the correct Filter settings. You may want to have the same Filter applied to the screen at all times or you may need to apply a variety of Filters depending on the task you are performing. So you need to be familiar with the Dispatch Filter options.

See Dispatch Filter Options (on page 374).

Find Dispatch ID

If you need to locate a particular Dispatch and know its Dispatch ID the fastest way to locate it is using the menu path Options > Find Dispatch ID.

See Find Dispatch ID (on page 376).

Find External ID

If you need to locate all Dispatches associated with a particular External ID or Police Reference. The fastest way to locate them is using the menu path Options > Find External ID.

See Find External ID (on page 377).

Show Contract Number in List

If your Dispatches are associated with number of different Contracts, it is possible to have several Dispatches with the same Dispatch ID such as 23. You display the Contract Number with the Dispatch ID to differentiate the Dispatches.

You follow the menu path Options > Show Contract No. in List to make the number of the Contract appear adjacent to the Dispatch ID in the (unnamed) Dispatch List panel on the **Dispatch** maintenance screen.

You would do this if you wanted to differentiate between Dispatches of different Contracts.

You would also do this if you wanted to print or export the list in the panel. You can then choose to show the Contract number concatenated with the Dispatch ID. To do this you right-click inside the panel and select the option Print or Export.

To make the number disappear you follow the same menu path.

Indicator	Contract/Dispatch	Call Status
3	2/2	Dispatched
3	2/508	Dispatched
3	2/2427	Dispatched
3	2/2428	Dispatched
3	2/2431	Dispatched
3	2/2432	Dispatched
3	2/2434	Dispatched
3	2/2435	Dispatched
3	2/2436	Dispatched
3	2/2437	Dispatched
3	2/2439	Dispatched
3	2/2461	Started Work
3	2/2462	Dispatched
3	2/2470	Dispatched
3	2/2471	Dispatched
3	2/2472	Dispatched
3	2/2473	Dispatched
3	2/2475	Dispatched
3	2/2476	Dispatched
3	4/2	Dispatched

It is this number which identifies the Contract to which the Dispatch belongs

Show Address in List

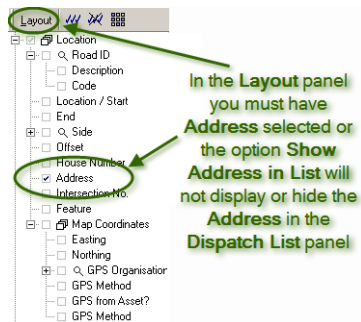
You may want to print or export a list of Dispatches which includes the Addresses for the Faults. You will then need to show the Address in the list.

You follow the menu path Options > Show Address in List to make the Address appear or disappear from the (unnamed) Dispatch List panel of the **Dispatch** maintenance screen.

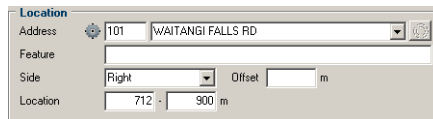
Indic...	Dis...	Call Status	Assigned to	Address
3	2	Dispatched	Grant Mackenzie	KINGSEAT RD
3	508	Dispatched	Grant Mackenzie	AKA AKA RD
3	2427	Dispatched	Grant Mackenzie	100 AISLABIE RD
3	2428	Dispatched	Grant Mackenzie	1000 AISLABIE RD
3	2431	Dispatched	Grant Mackenzie	12 AKA AKA - CHURCH RI
3	2432	Dispatched	Grant Mackenzie	ALLCOCK RD
3	2434	Dispatched	Grant Mackenzie	18 ANZAC RD
3	2435	Dispatched	Grant Mackenzie	AISLABIE RD
3	2436	Dispatched	Grant Mackenzie	2 ANDREW-PYE RD
3	2437	Dispatched	Grant Mackenzie	ADAMS DR
3	2439	Dispatched	Grant Mackenzie	26 AKA AKA - CHURCH RI
3	2461	Started Work	Grant Mackenzie	10 AISLABIE RD
3	2462	Dispatched	Grant Mackenzie	3 AITKEN RD
3	2470	Dispatched	Grant Mackenzie	1 ARTHUR CARWEN PL
3	2471	Dispatched	Grant Mackenzie	1 AICKEN RD
3	2472	Dispatched	Grant Mackenzie	1 AKA AKA - CHURCH RD
3	2473	Dispatched	Grant Mackenzie	1 ARROWVILLE RD
3	2475	Dispatched	Grant Mackenzie	1 SEDDON ST
3	2476	Dispatched	Grant Mackenzie	93 SEDDON ST
3	2	Dispatched	Grant Mackenzie	10 ALDER RD

To make the Address appear in the (unnamed) Dispatch List panel you follow the menu path Options > Show Address in List or if the Address is displayed, you follow the same menu path to hide it

The menu path Options > Show Address in List will have no effect if Address is not selected from the Layout panel. You need to press the blue Panel Sizer if the Layout panel is not available to make this change.



The Address displayed in the (unnamed) Dispatch List panel of the **Dispatch** maintenance screen will be the one in the Location section of the General tab of the Dispatch.



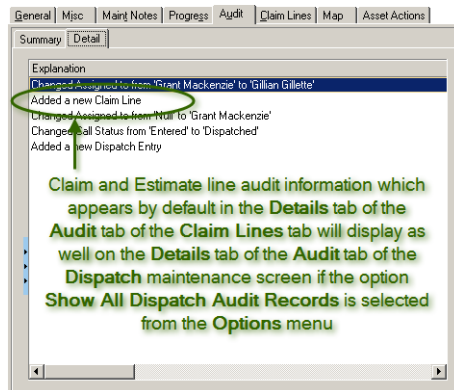
You would do this to display or hide the Address of the Fault in the Dispatch.

You could do this if you wanted to print or export the list in the panel. You choose whether or not to display the Address and then right-click inside the panel and select the option Print or Export.

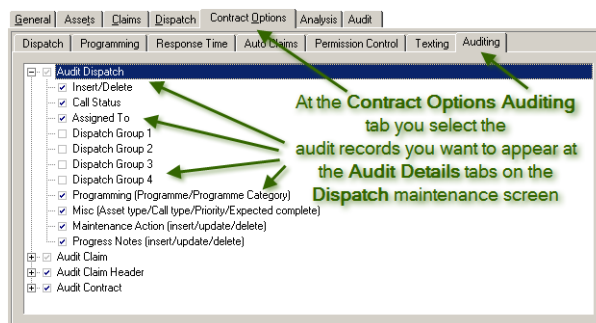
Show All Dispatch and Audit Records

You may want to display all the audit records for a Dispatch in one place. If so you need to Show all Dispatch and Audit Records.

You follow the menu path Options > Show All Dispatch Audit Records to make the Audit records which display on the Detail tab of the Audit tab of the Claim Lines tab of the **Dispatch** maintenance screen, display on the Detail tab of the Audit tab of the same screen.



The audit records which appear will be those chosen at the Auditing tab on the Contract Options tab of the **Contract Details** screen.



Limit Transfer List to Thirty Days

When you Transfer one Dispatch to another, you select the Dispatch from a list that includes all open Dispatches. You may want to shorten the list.

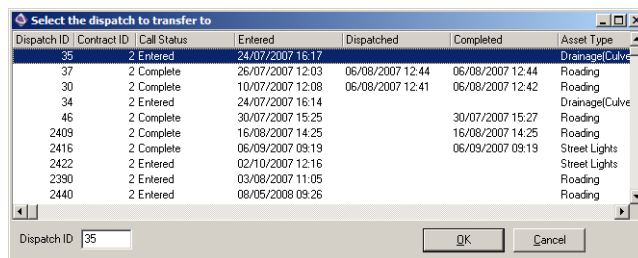
You follow the menu path Options > Limit Transfer List (30 Days) to limit the list of Dispatches available to which to transfer a Dispatch to only those added in the last thirty days.

See Transfer the Dispatch (on page 342).

The situation may arise where more than one Dispatch has been added for what turns out to be the same job. For instance several members of the public may have reported Street Light Lamps out in the same general area. If it turns out that the problem is a power source rather than individual lamps failing, you will want to add a Dispatch to repair the power failure and to transfer the Dispatches for Lamp failures to the new Dispatch.

You would not want to delete the incorrect Dispatches as this would remove the audit trail records of the calls from the public.

When you follow the menu path Actions > Transfer, the **Select the dispatch to transfer to** screen will open. This is an unfiltered list of all Dispatches to which it is possible to Transfer. It is this list which you are trying to restrict and make more manageable by following the menu path Options > Limit Transfer List (30 Days) to limit the list of Dispatches available to which to transfer a Dispatch to only those added in the last thirty days.



Dispatch ID	Contract ID	Call Status	Entered	Dispatched	Completed	Asset Type
35	2	Entered	24/07/2007 16:17			DrainageCulve
37	2	Complete	26/07/2007 12:03	06/08/2007 12:44	06/08/2007 12:44	Roading
30	2	Complete	10/07/2007 12:08	06/08/2007 12:41	06/08/2007 12:42	Roading
34	2	Entered	24/07/2007 16:14			DrainageCulve
46	2	Complete	30/07/2007 15:25		30/07/2007 15:27	Roading
2403	2	Complete	16/08/2007 14:25		16/08/2007 14:25	Roading
2416	2	Complete	06/09/2007 09:19		06/09/2007 09:19	Street Lights
2422	2	Entered	02/10/2007 12:16			Street Lights
2390	2	Entered	03/08/2007 11:05			Roading
2440	2	Entered	08/05/2008 09:26			Roading

Limit Patrol List to Three Months

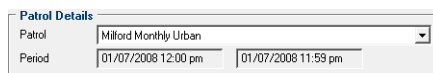
When you associate a Patrol with a Dispatch you select the Patrol from a list of all Patrols. You may want to shorten the list.

You follow the menu path Options > Limit Patrol List (3 Months) to limit the list of Patrols available to select, when defining the Patrol which resulted in the Dispatch, to only those Patrols which have taken place in the last three months.

You would do this if you had a large number of Patrol records.

When you are adding or updating a Dispatch the Patrol Details section and the Patrol drop-down list will appear on the Misc tab of the **Dispatch** maintenance screen if the Call Type is one for which Patrol has been selected in the Dispatch Entry Detail Panel section of the **Call Types** maintenance screen.

It is the list of Patrols available at this drop-down list which you are limiting by following the menu path Options > Limit Patrol List (3 Months).



You add Patrol Headers at the Patrols tab of the Dispatch tab on the **Contract Details** screen. See Adding Patrol Headers.

Patrols with Pocket RAMM

Patrol teams can select a Patrol Header from within **Pocket RAMM**. The Jobs raised will then be recorded against the relevant Patrol if required. You also have the option not to associate Jobs with a particular Patrol.

If you use **Pocket RAMM** you do not need to limit the Patrol List to three months as once you have selected your Patrol it will default until you change the value.

Patrols without Pocket RAMM

If you are not using **Pocket RAMM** with **RAMM Contractor**, the Contract administrator can enter the information about the Patrol into the **Patrol Records** screen from the crew member paper records.

Once you have set up all the Patrol Headers at the Patrols tab, Dispatches can be linked to them at the Patrol drop-down list in the Patrol Details section on the Misc tab of the **Dispatch** maintenance screen.

See Introduction to Patrol Records.

Call Types

Where **Pocket RAMM** is not being used to enter Jobs, you set up Patrols as Call Types. These describe the source of a Fault report and are required at the **Dispatch** maintenance screen.

It is only for Call Types for which Patrol has been selected in the Dispatch Entry Detail Panel section of the **Call Types** maintenance screen that the Patrol Details section and the Patrol drop-down list will appear on the Misc tab of the **Dispatch** maintenance screen when operators are adding Dispatches.

It is the list of Patrols available at this drop-down list which you are limiting by following the menu path Options > Limit Patrol List (3 Months).

See Dispatch Call Types (on page 100).

Show Closed Contracts

Normally the list of Dispatches in the (unnamed) Dispatch List panel contains only Dispatches from Current Contracts. In unusual circumstances, you may need to show Dispatches from Closed Contracts as well.

You follow the menu path Options > Show Closed Contracts to make Dispatches from Contracts which have been closed appear in the (unnamed) Dispatch List panel on the **Dispatch** maintenance screen.

An example of why you might want to do this would be if you wanted to investigate maintenance activity in a particular Road over the previous five years when your Contract has been active only for two. You would turn on the option and then filter for the results from the previous five years.

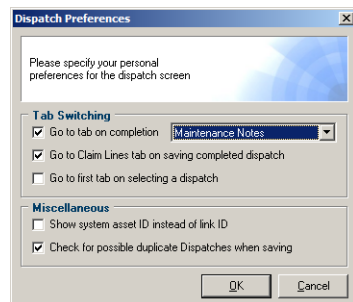
You would only see the Dispatches from the previous Contracts if you had the correct Staff Permissions.

Normally you would have this option turned off.

Dispatch Preferences

You can make the **Dispatch** maintenance screen behave according to your preferences to increase your productivity. You can also set Asset link preferences for some Asset Types.

You follow the menu path Options > Dispatch Preferences to open the **Dispatch Preferences** dialog. You use these options to make the **Dispatch** maintenance screen behave in the most efficient manner for your operations.



Go to Tab on Completion

When you set a Dispatch as **Complete** by following the menu path Actions > Complete you can set the screen to open at a particular tab as a reminder to make sure that the proper information has been added.

You would normally select this option and set it to **Maintenance Notes**.

Go to Claim Lines Tab on saving Completed Dispatch

When you set a Dispatch as **Complete** by following the menu path Actions > Complete you can set the screen to open at the Claim Lines tab after you have saved the changes. You would do this as a reminder to make sure that the proper Claim line information has been added.

You would normally select this option.

Go to First Tab on Selecting a Dispatch

You select this option if, when you select a Dispatch in the (unnamed) Dispatch List panel, you want the Dispatch to open at the first tab. This is the one furthest to the left of the screen. Normally this is the **General** tab.

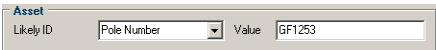
When you select a Dispatch record from the (unnamed) Dispatch List panel, the default behaviour is for the selected Dispatch to open at the same tab as the previously selected one. This is very convenient if you want to compare Dispatch values.

You would normally clear this option.

Show System Asset ID Instead of Link ID

Instead of using the **RAMM Contractor** system IDs, some Network Owners prefer to use their own identification system for Assets of Type Streetlights, Signs, Traffic Signals, Drainage, Bridges, Retaining Walls and Miscellaneous Structures. This could be the Pole ID, or some other identification system.

To link a Dispatch to one of these Assets using their own Asset ID system rather than the System ID they clear the Show system asset ID instead of link ID option. Then when they are adding a Dispatch for one of the Asset Types whose tables have a Likely column, the Likely ID and Value fields appear in the Asset section on the **General** tab.



The screenshot shows a software interface for an 'Asset' section. It contains two input fields: 'Likely ID' with a dropdown menu currently showing 'Pole Number', and 'Value' with a text box containing 'GF1253'.

If the Show system asset ID instead of link ID option is selected, only the standard Asset field on the Asset section will be available.



The screenshot shows a software interface for an 'Asset' section. It contains a single input field labeled 'Asset' with the text 'Bern ID 6' entered.

You would normally select this option unless you use your own identification system for Assets of Type Streetlights, Signs, Traffic Signals, Drainage, Bridges, Retaining Walls and Miscellaneous Structures.

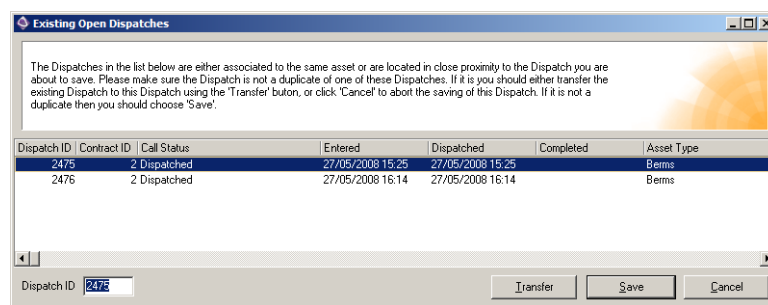
Check for Possible Duplicate Dispatches When Saving

Having one or more Dispatches for the same Fault could potentially cause inefficiency and other problems. So you can set **RAMM Contractor** to check when you are saving a Dispatch which you have just added that it is not a duplicate of an existing Dispatch.

It checks that there is not an existing Dispatch for the same Asset or one that is located in close proximity to the Dispatch. If it locates a Dispatch which may be a duplicate, it opens the **Existing Open Dispatches** screen with a list of possible duplicates.

If one or more of the listed Dispatches are duplicates you highlight the Dispatch and press the Transfer button to Transfer the existing Dispatch into the new one. There will then only be one active Dispatch for the Fault.

You would normally select this option.



Dispatch Filter Options

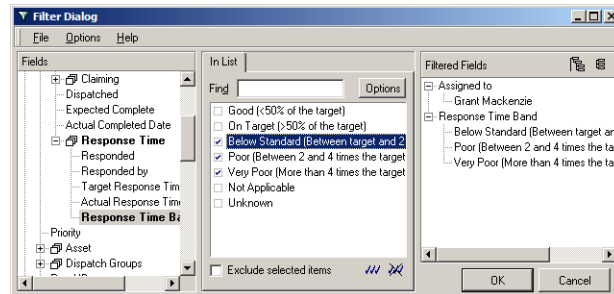
In order to work effectively at the **Dispatch** maintenance screen you need to apply the correct Filter settings. You may want to have the same Filter applied to the screen at all times or you may need to apply a variety of Filters depending on the task you are performing. So you need to be familiar with the Dispatch Filter options.

When you first open the **Dispatch** maintenance screen the **Dispatch** filter selection screen opens so that you can filter the Dispatches to determine which will appear in the (unnamed) Dispatch List panel. You do this so that the screen will load faster and so that you can work faster with only Dispatches relevant to your work in the (unnamed) Dispatch List panel.

See the Filters chapter of the *Using RAMM* guide.

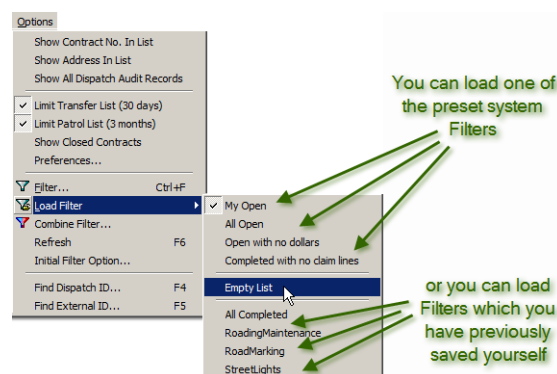
Filter

You follow the menu path Options > Filter to open the **Filter Dialog** screen with the Dispatch Entry options available. You use this to determine which Dispatches will appear in the (unnamed) Dispatch List panel.



Load Filter

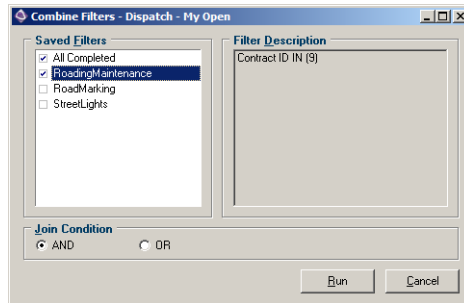
You follow the menu path Options > Load Filter to show a list of preset Filters which you can apply to to determine which Dispatches will appear in the (unnamed) Dispatch List panel.



Combine Filter

When you are filtering Dispatches, you may have saved two separate Database Filters, both of which you want to apply at the same time. When you combine Database Filters, you can do exactly that. Normally, when you apply another filter, it cancels the effects of the previous one.

You follow the menu path Options > Combine Filters to open the **Combine Filters** screen.



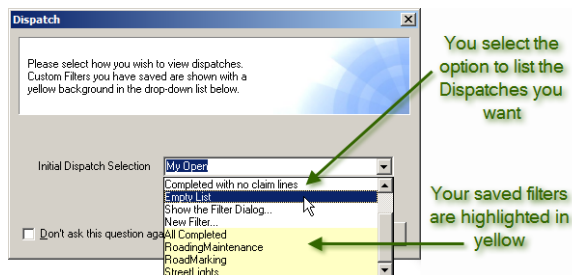
Initial Filter Option

When you first open the **Dispatch** maintenance screen the **Dispatch** Filter selection screen opens. If you select the Filter you want to use and then select the Don't ask this question again option, the **Dispatch** Filter selection screen will no longer open prior to the **Dispatch** maintenance screen which will now open automatically filtered using the Filter you chose.

If your requirements change and you want the **Dispatch** maintenance screen to open automatically filtered using a different Filter you follow the menu path Options > Initial Filter Option to open the **Initial** Filter selection screen. This screen is the **Dispatch** Filter selection screen by another name.

You then select from the Initial Dispatch Selection drop-down list the Filter you want to use when the **Dispatch** maintenance screen to opens automatically.

If your needs change and you now need to select a variety of Filters when you open the **Dispatch** maintenance screen, you clear the Don't ask this question again option, the **Dispatch** Filter selection screen will then open prior to the **Dispatch** maintenance screen.

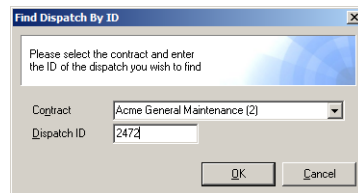


Find Dispatch ID

If you need to locate a particular Dispatch and know its Dispatch ID the fastest way to locate it is using the menu path Options > Find Dispatch ID.

You do this to open the **Find Dispatch By ID** dialog. You select the correct Contract, type in the Dispatch ID and press .

Your Dispatch will then be the only one in the (unnamed) Dispatch List panel.

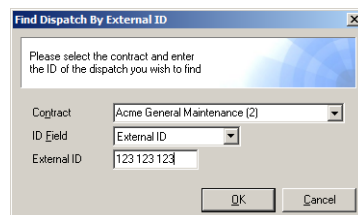


Find External ID

If you need to locate all Dispatches associated with a particular External ID or Police Reference. The fastest way to locate them is using the menu path Options > Find External ID.

You do this to open the **Find Dispatch By External ID** dialog. You select the correct Contract, select the field in which the External ID or Police Reference has been typed and then type in the External ID and press .

Your Dispatch(es) will then be the only ones in the (unnamed) Dispatch List panel.



Dispatch Highlighting

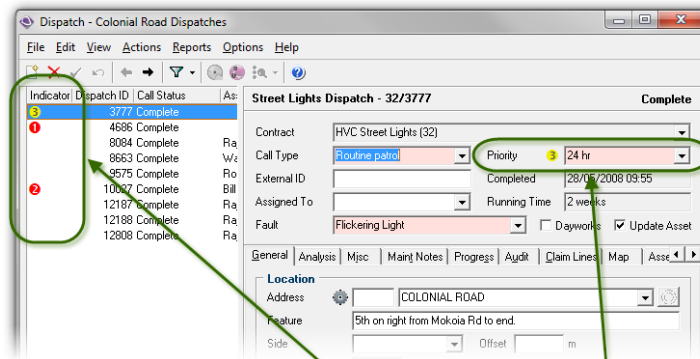
When you have a list of Dispatches with which to deal, it is helpful to have visual clues to clarify which ones are related to others. This could be to differentiate those which are of the highest priority and must be dealt with as a matter of urgency. You use Dispatch Highlighting to achieve this.

Dispatch Priority Codes

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.

When you add Priority codes, you can determine how the associated Jobs will appear on the **Map** in **Pocket RAMM**. See Priority (on page 148).

You use Dispatch Highlighting to determine how Dispatches will appear in the (unnamed) Dispatch list panel on the **Dispatch** maintenance screen.



You view **Dispatch Highlighting** in the **Indicator** column and next to the **Priority** field.

Dispatch Highlighting Options

Dispatch Highlighting is a very flexible way of highlighting groups of Dispatches.

You can differentiate groups of Dispatches by Colour, Icon, Asset Type, and Dispatch parameters.

Contract Specific

Dispatch Highlighting is specific to an individual Contract. So your settings for your Street Lights Contracts need not be the same as those for your Road Maintenance Contracts.

You select the Contract before you can add Dispatch Highlighting at the **Dispatch Highlighting** screen.

Colour

You select the colour for the icon by selecting a standard colour from the Colour drop-down list or by pressing the adjacent ellipsis and using the Colour Picker to define your own custom colour.

To understand the use of the colour picker see Viewing Options (on page 502).

Icon

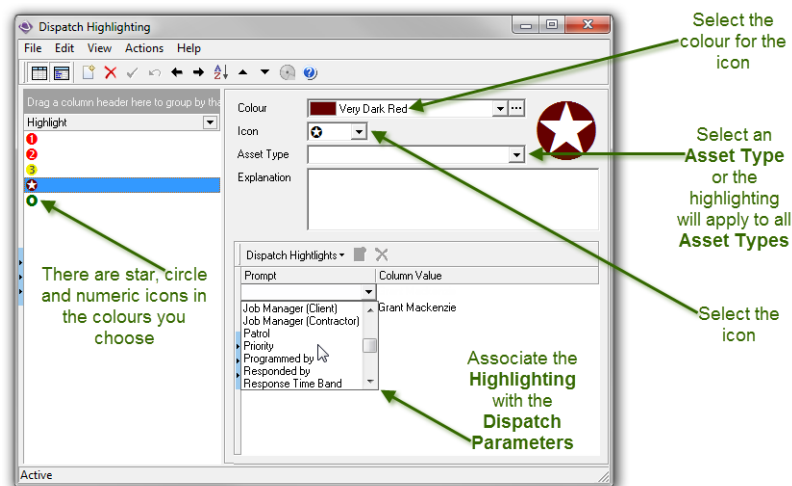
There are three preset icon styles from which to choose. There are numeric icons from 1 to 10. There is a star and a circular icon.

Asset Type

The Dispatch Highlighting applies to all Asset Types by default. You select a value at the Asset Type drop-down list to restrict the Dispatch Highlighting to a particular Asset Type.

Associate with Dispatch Parameter Value

When you have defined and saved your icon, you associate it with Dispatch parameters. The options are extensive. For instance you could highlight all Dispatches assigned to a particular person, all associated with a Claim Group or all Dispatches from a particular Patrol.



Adding a Dispatch Highlighting Icon

Introduction

When you have a list of Dispatches with which to deal, it is helpful to have visual clues to clarify which ones are related to others. This could be to differentiate those which are of the highest priority and must be dealt with as a matter of urgency. You use Dispatch Highlighting to achieve this.

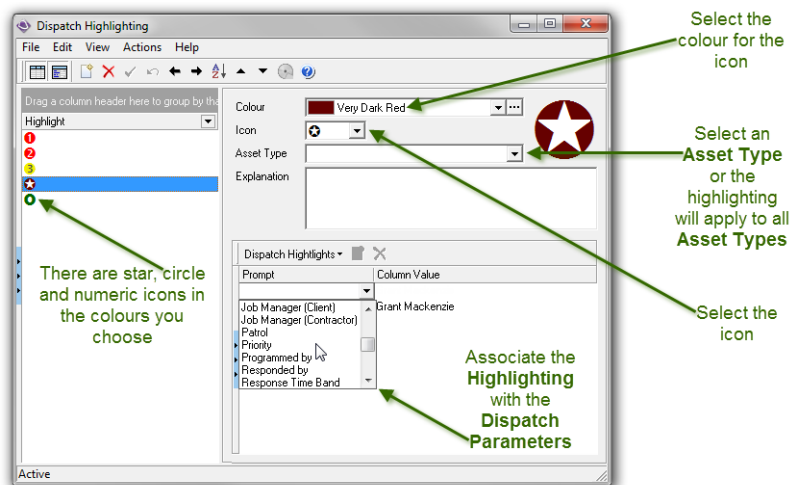
Before you do this you need to have:

- added the Dispatch parameters which you wish to highlight. An example of this could be Priority codes. You add these at the Priority tab of the **Contract Details** screen. See Adding Priority Codes (on page 149).
- a logical Dispatch Highlighting icon colour and shape system which matches your business practices.


Menu Path

Follow the menu path Maintenance > Dispatch > Dispatch Highlighting > (select Contract) > (press OK) to open the **Dispatch Highlighting** screen.


► To Add a Dispatch Highlighting Icon





To do this you follow these steps:

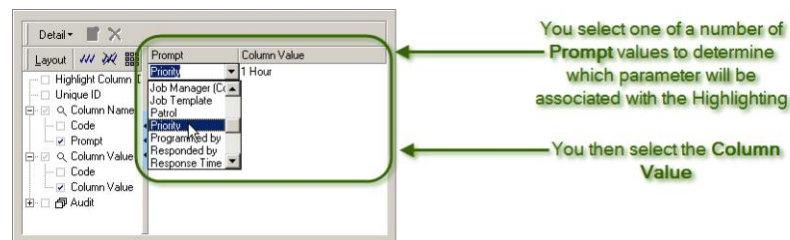
- 1 Press . The fields on the screen will become available.
- 2 Which colour do you want the icon?


If you want to use a	then
standard colour	go to step 3
custom colour	go to step 5

- 3 Select, from the **Colour** drop-down list, the colour for the icon.
- 4 Go to step 7.
- 5 Press  adjacent to the **Colour** field.
The **Colour Picker** will open.
- 6 Define your custom colour for the icon. See Viewing Options (on page 502).
- 7 Select from the **Icon** drop-down list, the icon to make the Dispatches stand out.
- 8 Do you want to restrict this Dispatch Highlighting icon to a single Asset Type?

Yes	go to step 9.
No	go to step 10.

- 9 Select, from the **Asset Type** drop-down list the Asset Type for the icon.
- 10 Press .
Your changes will be saved.
- 11 In the **Dispatch Highlights** section, press .
The fields in the section will become available.



- 12 Double-click in the first row of the **Prompt** column.
The **Prompt** drop-down list will become available.
- 13 Select from the **Prompt** drop-down list, the Dispatch parameter with which you want to associate this icon.
- 14 Double-click in the **Column Value** row.
The values will have defaulted dynamically to those related to the selected Dispatch parameter.
- 15 Select from the **Column Values** drop-down list, the value for the Dispatches you want highlighted with this icon.
- 16 Press .
Your changes will be saved.
- 17 Do you want to add another Dispatch Highlighting icon?

Yes	go to step 1.
------------	---------------

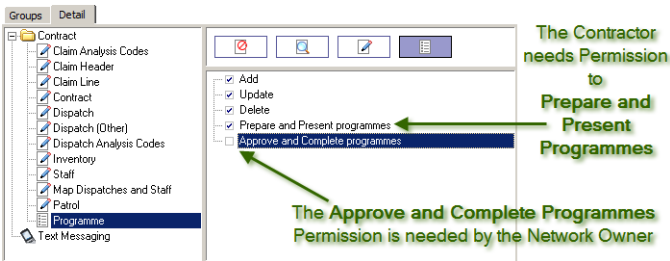
No	go to step 18.
----	----------------

18 Close the screen in the normal manner.

Maintenance Programmes

A maintenance Programme is the agreed maintenance works to be carried out by a Contractor during the Programme period. This is usually one month.

This section contains an introduction to Maintenance Programmes and the **Programmes** maintenance screen. However, if you want to understand how best to use the Maintenance Programme functions in **RAMM Contractor** you should read the chapters on Maintenance Programmes in the *RAMM Contractor Best Practice* guide.



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Programme Actions.....	388
Programme Reports	395

Introduction to Maintenance Programmes

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.



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.

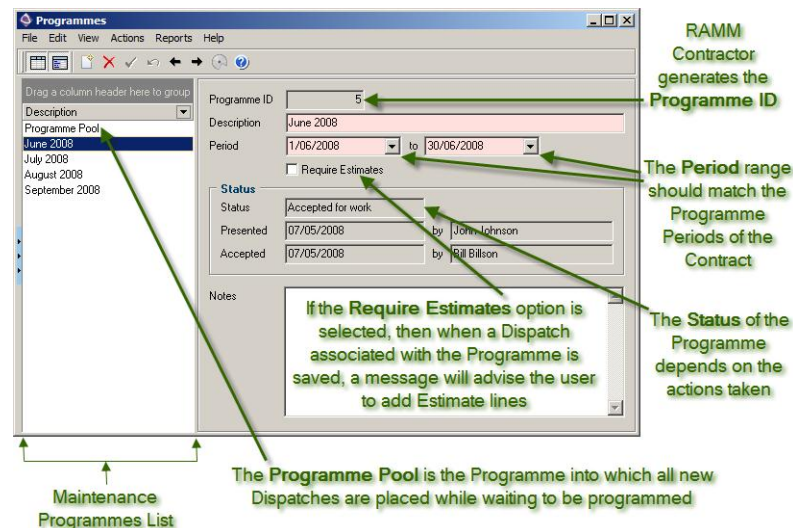
Enable Programming

If you are required by your Contract, to present a Programme of works to the Network Owner, you can do this only if you enable Programming.

You enable Programming at the Programming tab of the Contract Options tab at the **Contract Details** screen. See Enabling Programming (on page 184).

Programmes Screen

You add and maintain Maintenance Programmes at the **Programmes** screen.



Maintenance Programmes List

The (unnamed) Maintenance Programmes List panel contains a list of all Programme Headers for the Contract.

Programmes which have a status of Completed still appear on the list but will no longer be available at the Programme drop-down list in the Programming section of the **Dispatch** maintenance screen.

Programme ID

When you add a Programme, **RAMM Contractor** assigns the next available sequential integer as the Programme ID. This field is unable to be entered or edited.

Description

You should name the Programme to comply with the provisions of the contract.

Period

You should select the start and end dates of the Programme Period to match the provisions of the contract.

Status

The Status of a Programme depends on the Action taken with it. The statuses are:

- **Open for new jobs**
Anyone who has the correct Permissions can assign this Programme to a Dispatch. This is the default status for new Programmes and for those in the preparation or presentation stages which are reopened.
- **Preparing for presentation**
This is the status for Programmes when a Contract Manager has followed the menu path **Actions > Prepare Programme**. Anyone who has the correct Permissions can associate this Programme with a Dispatch.
- **Presented to the client**
This is the status for Programmes when a Contract Manager has followed the menu path **Actions > Present Programme**. Anyone who has the correct Permissions can associate this Programme with a Dispatch.
- **Accepted for work**
This is the status for Programmes when a Network Manager has followed the menu path **Actions > Accept Programme**. Anyone who has the correct Permissions can associate this Programme with a Dispatch.
- **Completed**
This is the status for Programmes when a Contract Manager has followed the menu path **Actions > Complete Programme**. No user can now associate this Programme with a Dispatch.

Audit Fields

The names of the users who Presented and Accepted the Programme as well as the dates are recorded by **RAMM Contractor** in the Presented and Accepted fields of the Status section.

Notes

There is a large field with room for extensive notes.

Programme Maintenance

You should add the Programme Pool and all the Maintenance Programmes at the beginning of a Contract.

Once you have added the Programmes, users will associate Dispatches and Jobs with them. You will then have to change the status of the Programmes as appropriate.

You should read the *RAMM Contractor Best Practice* guide to understand the process of changing Programme Status.

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.

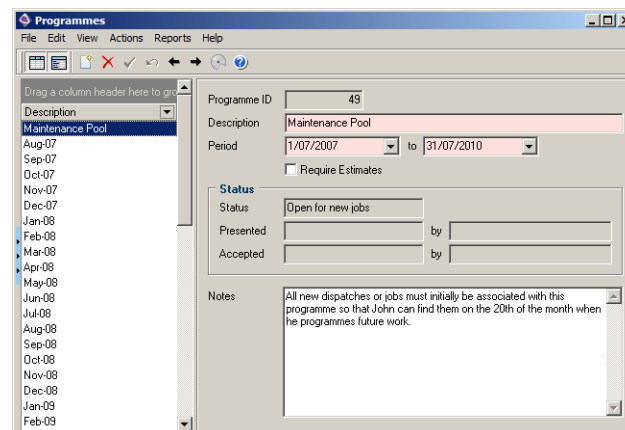
Menu Path

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.

Programme Actions

When a Contractor has created Maintenance Programmes for a Contract, Dispatches and Jobs are then associated with it.

The Contractor then **Prepares** the Programme and when it is ready, **Presents** it to the Network Owner for Approval.

Once the Network Owner has **Approved** the Programme of Works, the Contractor can proceed to perform the tasks as defined in the Dispatches and Jobs.

The Network Owner should **Complete** the Programme when the end of the Programme Period is reached.

Prepare Programme

The Contractor can change the status of a Programme to **Preparing for presentation** once they have set up:

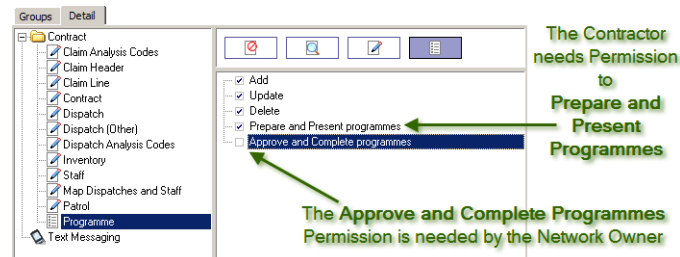
- a catch-all Programme named **Programme Pool** to which all new Maintenance Programme Dispatches are assigned at the time of creation
- a series of Programmes named after Programme Period of the Maintenance Contract duration such as **Aug-08**, **Sept-08** and **Oct-08**.

Best practice is that on or before a regular date such as the 20th of each month, a senior Contractor staff member will reassign Dispatches from the Programme Pool into the appropriate Programme period, for example, **Aug 08**.

It is this Programme, **Aug 08**, which the Contractor highlights and follows the menu path **Actions > Prepare Programme** to change the status to **Preparing for presentation**.

Anyone who has the correct Permissions can associate this Programme with a Dispatch. However, only if the user has the correct Permissions can they change the Programme status.

Staff Permissions



The Contractor needs the Prepare and Present programmes permission to be able to prepare a Programme.

You set Contract Permissions at the **Staff Permissions** maintenance screen. See Adding Staff to a Contract (on page 118).

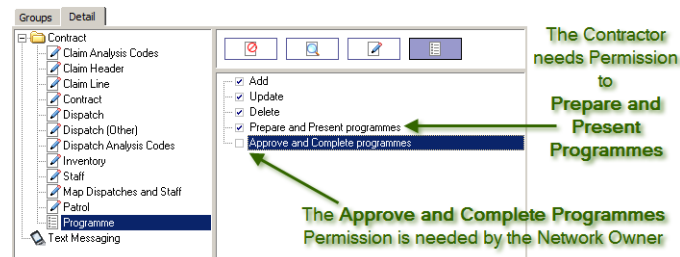
Present Programme

When the Contractor has Prepared the Programme for the maintenance period of the Contract, they will want to Present it to the Network Owner for their consideration.

To Present the Programme the Contractor highlights it and follows the menu path Actions > Present Programme to change the status to Presented to the Client.

Anyone who has the correct Permissions can associate this Programme with a Dispatch. However, only if the user has the correct Permissions can they change the Programme status.

Staff Permissions



The Contractor needs the Prepare and Present programmes permission to be able to present a Programme.

You set Contract Permissions at the **Staff Permissions** maintenance screen. See Adding Staff to a Contract (on page 118).

Reopen Programme

When the Contractor has changed the status of a Programme to Preparing for presentation or Presented to the Client they may need to change the status back to Open for new jobs.

To do this they follow the menu path Actions > Re-open Programme.

Anyone who has the correct Permissions can associate this Programme with a Dispatch.

Accept Programme

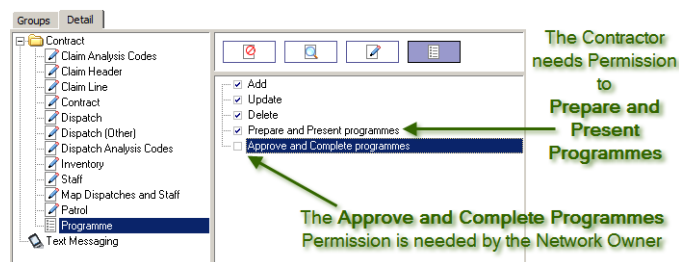
When the Contractor has Presented the Programme for the maintenance period of the Contract, to the Network Owner, they, or their Consultants, will want to check the Programme to ensure that it complies with their maintenance priorities and budget limitations for the Programme period.

The Network Owner Accepts the Presented Programme when satisfied with it.

To Accept the Programme the Network Owner highlights it and follows the menu path Actions > Accept Programme to change the status to Accepted for work.

Anyone who has the correct Permissions can associate this Programme with a Dispatch. However, only if the user has the correct Permissions can they change the Programme status.

Staff Permissions



The Network Owner needs the Approve and Complete programmes permission to be able to Accept a Programme.

You set Contract Permissions at the **Staff Permissions** maintenance screen. See Adding Staff to a Contract (on page 118).

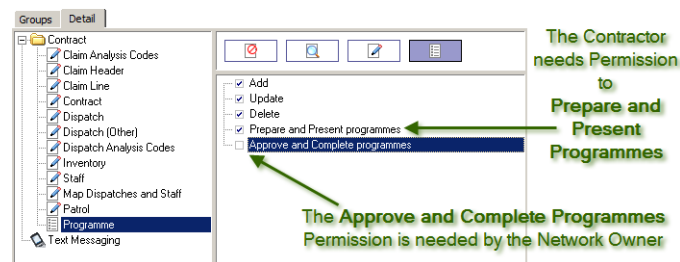
Complete Programme

When the Network Owner has Accepted the Programme for the maintenance period of the Contract, they will want to Complete the Programme to prevent any changes to it.

To Complete the Programme the Network Owner highlights it and follows the menu path Actions > Complete Programme to change the status to Completed.

At this stage, nobody can associate this Programme with a Dispatch. Nor can they change the Programme status.

Staff Permissions



The Network Owner needs the Approve and Complete programmes permission to be able to Complete a Programme.

You set Contract Permissions at the **Staff Permissions** maintenance screen. See Adding Staff to a Contract (on page 118).

Estimate Lump Sums

When you set up your Schedule Items, you may define them as Lump Sum items.

You do this at the General section on the General tab of the **Contract Schedule Items** maintenance screen. See Introduction to CSIs (on page 234).

General Maintenance Cost Automatic Claims Audit

General

Item Number: A1

Description: INSPECTIONS (Cyclic) (Minimum Rate = \$2500.00)

PDA Description:

Item Type: **Lump Sum** (selected from dropdown)

Activity: Normal (selected from dropdown)

Lump Sums are not really Estimates, they are Claims as per the contract. So it is not standard practice to include them with a Maintenance Programme of Estimates.

Nonetheless, some Network Owners want to see the Lump Sum totals at the same time as the Programme is presented. This way they ensure that there are no unwelcome surprises.

A Contractor generates this by following the menu path Actions > Estimate Lump Sums. This opens the **Lump Sum** screen.

Please select the lump sum items to generate estimate lines for below.

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 estimate lines as Presented

Asset Type: Administration

Priority: Cyclic Maintenance

Call Type: Staff

10% Audit:

OK Cancel

Only those Schedule Items whose Item Type has been defined as Lump Sum will appear in the list panel

You generate Lump Sum Estimate lines by a combination of Asset Type, Priority code and Call Type code

You select Lump Sum Schedule Items from the list and a combination of Asset Type, Priority code, Call Type and Dispatch Group if you use them. The Dispatch Group field shown above is the 10% Audit field. When you press the **OK** button, **RAMM Contractor** generates a Dispatch with the Estimate lines added. If you selected the Mark estimate lines as Presented option, the Estimate lines in the new Dispatch will be set as Presented.



If you want to generate Lump Sum Estimate lines, you need to do this before you have changed the status of the Programme to Preparing for Presentation.

Changing Programme Status

Introduction

If contract provisions stipulate that a Contractor must present an estimated Programme of works to a Network Owner prior to a Contract Programme period, then, on or before a regular date such as the 20th of each month, when the senior staff member of the Contractor reviews the pooled Dispatches and Programmes some into the next Programme Period.

They then present the Programme to the Network Owner. When the Network Owner has accepted the Programme they then complete the Programme which closes it.

Before you do this you need to have:

- added the Programmes. You do this at the **Programmes** maintenance screen. See Adding Programmes (on page 387).

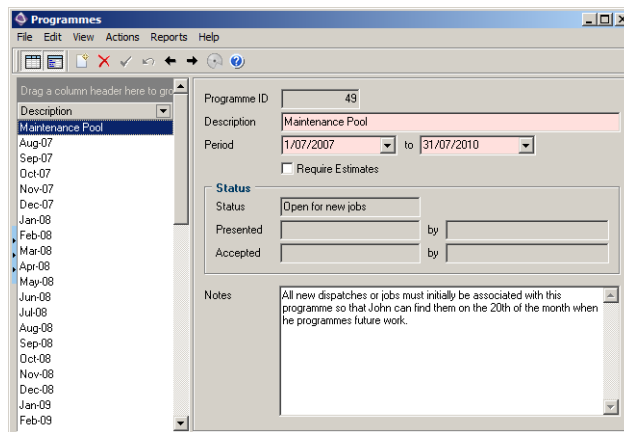
Menu Path

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

► To Change Programme Status

To do this you follow these steps:

- 1 Highlight the Programme whose status you want to change.



- 2 What you do next depends on your Permissions and the Status of the Programme.

If you want to change the status to	then follow the menu path
Preparing for presentation A senior Contractor staff member should take this action before reassigning Dispatches from the Programme Pool into the appropriate Programme period.	Actions > Prepare Programme
Presented to the client When a senior Contractor staff member has prepared the Programme for the maintenance period of the Contract, they should to Present it to the Network Owner for consideration.	Actions > Present Programme
Open for new jobs If a Contractor needs a Programme to revert to its original status they have this option before the Programme has been Accepted by the Network Owner.	Actions > Re-open Programme
Accepted for work When the Network Owner, or their Consultants, have checked the Programme and are satisfied that it complies with their maintenance priorities and	Actions > Accept Programme

If you want to change the status to	then follow the menu path
budget limitations for the Programme period, they Accept the Presented Programme.	
Completed When a Network Owner wants to close an Accepted Programme they change its status to Completed.	Actions > Complete Programme

- 3 Close the screen in the normal manner.

Programme Reports

There are a number of reports which you can run from the **Programmes** screen. The reports are all available elsewhere. You run these reports from the **Programme** screen to limit the results to data from a particular Maintenance Programme.

Claim/Estimate Analysis

The Claim/Estimate Analysis report is a Decision Cube which you can use to manipulate Claim and Estimate data for reporting purposes. It generates an analysis by Claim Year, Claim Amount and Claim Quantity by default.

See Claim/Estimate Analysis (on page 490).

Dispatch Analysis

The Dispatch Analysis report is a Decision Cube which you can use to manipulate Dispatch data for reporting purposes. It generates an analysis of Dispatches by Call Status and Call Type by default but you can reconfigure this.

See Dispatch Analysis (on page 487).

Dispatch Report (Print Dispatches)

The Dispatch Report is a highly configurable report for printing Dispatch data. You use it to list and group virtually any Dispatch data.

See Dispatch Report (Print Dispatches) (on page 396).

Estimate Line Grid

The Estimate Line Grid report is a highly configurable report for exporting Estimate line data. You use it to list and group virtually any Estimate line data to a number of formats for use outside **RAMM Contractor**.

See Estimate Line Grid Report (on page 398).

State Highway Estimates

The State Highway Estimates report is a special purpose report and as such may not have application for all **RAMM Contractor** users. It groups and lists Estimate line information and in particular SH (State Highway), RS (Reference Station) and RP (Route Position) for export to the New Zealand Transport Agency (NZTA).

See State Highway Estimates Report (on page 398).

Dispatch Report (Print Dispatches)

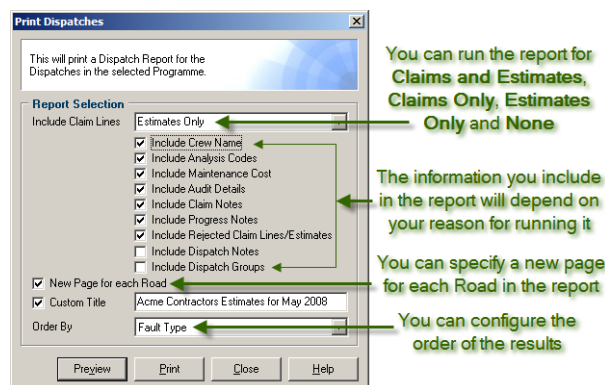
The Dispatch Report is a highly configurable report for printing Dispatch data. You use it to list and group virtually any Dispatch data. You can then print the report.

Print Dispatches

Reports similar to the Dispatch Report are available elsewhere. For instance, the Job Sheets report which is available from the **RAMM Contractor** main screen menu path Reporting > Contract Management > Job Sheets. See Job Sheet (on page 489).

You run this report from the **Programme** screen to limit the results to data from a particular Maintenance Programme.

From the **Programmes** screen you follow the menu path Reports > Dispatch Report to open the **Print Dispatches** dialog.



Include Claim Lines

Normally you would run the report for Estimates Only. Your options are:

- Claims and Estimates
- Claims Only
- Estimates Only
- None.

Information Options

There are a number of options which you can select to determine the report results. For instance, if you were interested in which Field Crews were going to perform which tasks you would select Include Crew Name.

New Page for Each Road

You have the option to have the report group the results by Road name and to have the results related to each Road start a new page. You would do this in conjunction with Include Crew Name to be sure that you were not sending more than one crew to the same Road.

Custom Title

You have the option to define your own report header.

Order By

You can determine the order of the results.

CJN Technologies Limited

Hill Valley Council

User: Grant Mackenzie

Page: 1

Printed: Friday, 9 May 2008 4:02:12 p.m.

Dispatch Report

Acme General Maintenance

Programme Pool - Ordered by Fault Type

Dispatch	Call Entered	Location	Call Completed
2/801	2/08/2007	BOTHWELL PARK RD, AWHITU WARD [59] (2395m), Left	
Running Time: 40 weeks 1 day		3 (Repairs within 1 mth)	
Asset Type: Roothing		Call Type: Staff	
Length: 8.0m Width: 2.0m		Quantity: 16.0	
Fault: Alligator Cracking			
Item	Work Completed Units	Qty.	Rate (\$)
B3.4	STABILISATION (2% Lime / 2%	m2	16 x 13.50 = 216.00
Subtotal			216.00
2/802	2/08/2007	BOTHWELL PARK RD, AWHITU WARD [59] (2616m), Left	
Running Time: 40 weeks 1 day		3 (Repairs within 1 mth)	
Asset Type: Roothing		Call Type: Staff	
Length: 4.0m Width: 2.0m		Quantity: 8.0	
Fault: Alligator Cracking			
Item	Work Completed Units	Qty.	Rate (\$)
B3.4	STABILISATION (2% Lime / 2%	m2	8 x 13.50 = 108.00
Subtotal			108.00

Estimate Line Grid Report

The Estimate Line Grid report is a highly configurable report for exporting Estimate line data. You use it to list and group virtually any Estimate line data to a number of formats for use outside **RAMM Contractor**.

Configure and Export Estimate Line Data

From the Programmes screen you follow the menu path Reports > Estimate Lines Grid Report to open the **Estimate Lines** report which is in a Grid.

This grid shows one row for each estimate line within the current programme period. Where there are multiple estimate lines for one dispatch, information about that dispatch will be duplicated against each estimate line.

Entered	Dispatch ID	Asset Type	Call Type	Estimated Quantity	Road ID	House No	Feature
10/07/2007 11:35	29	Roading	Staff		ADAMS RD		
10/07/2007 11:35	29	Roading	Staff		1 ADAMS RD		
30/07/2007 09:31	40	Roading			1 ADAMS RD		1
30/07/2007 09:31	40	Roading			24 ADAMS RD		1
30/07/2007 15:25	46	Roading	Staff		36		

You use the Layout panel to select the columns to appear in the report

You then press the Refresh button to display the selected columns

You then manipulate the Grid in the normal manner before exporting the information in the required format

State Highway Estimates Report

The State Highway Estimates report is a special purpose report and as such may not have application for all **RAMM Contractor** users. It groups and lists Estimate line information and in particular SH (State Highway), RS (Reference Station) and RP (Route Position) for export to the New Zealand Transport Agency (NZTA).

Print Dispatches

From the Programmes screen you follow the menu path Reports > Special Purpose > State Highway Estimates to open the **State Highway Estimates** report which is in a Grid.

State Highway Estim Report - October 2007 (8)

Layout

- ☒ taskno
- ☒ Location
 - ☒ sh
 - ☒ rs
 - ☒ rp
 - ☒ Q, Side
 - ☒ direction
 - ☒ sched_item
 - ☒ Estimate
 - ☒ rate
 - ☒ cost
 - ☒ Q, Priority
 - ☐ Location / Start

Drag a column header here to group by that column

taskno	sh	rs	rp	Side	direction	sched_item	quantity	rate
7765.46539	003	0414	0000	Left	INCR	5.3.2a		
7765.47377	003	0415	0664	Left	INCR	5.6.2.1		
7816.46622	003	1324	0016	Left	INCR	5.2.6		
7816.46623	003	1145	0124	Left	INCR	5.4		
7841.46729	003	0065	6250	Left	INCR	5.2.6		
7841.46730	003	0423	9675	Left	INCR	5.4		
7909.46843	003	0433	3254	Left	INCR	5.8.2		
7959.47163	003	0333	4578	Left	INCR	5.2.12		
7959.47164		0416	0230	Centre	INCR	5.4		

You use the Layout panel to select the Columns to appear in the report

State Highway

Reference Station

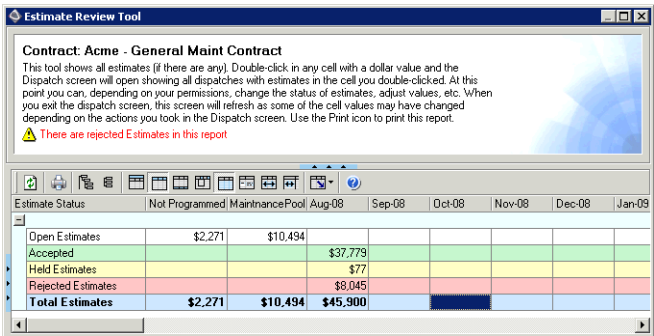
Route Position (kms)

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.

You must read the *RAMM Contractor Best Practice* guide to understand how best to use the Estimate Review Tool to maximise efficiency in Programmed Maintenance Contract management.

The *RAMM Contractor Best Practice* guide is available from the RAMM Training tab of the **RAMM Software Limited** web site (<http://www.ramm.co.nz>).



Estimate Review Tool

Contract: Acme - General Maint Contract

This tool shows all estimates (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	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				

In This Chapter

Introduction to the Estimate Review Tool	402
Estimate Review Tool - Analysis Groups	403

Introduction to the 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.

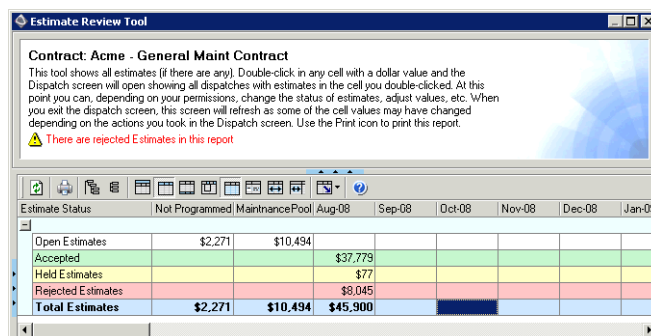
However, Dispatches or Jobs can be added by any user with sufficient Security Permissions. These users can be Contractor staff, Network Owner staff or Consultant staff. So as well as the Dispatches which have been added according to the recommended practice, there may well be others which have not.

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.



Contract: Acme - General Maint Contract

This tool shows all estimates (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	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

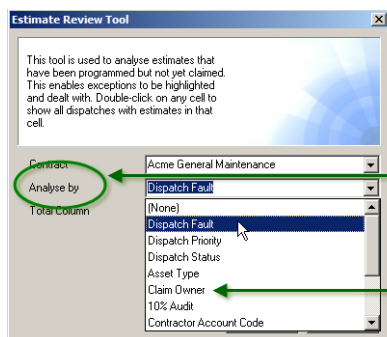
You will notice in the graphic above that there are \$77 worth of Held Estimates in the Aug-08 Programme. The Contractor needs to investigate and edit these Estimates before Presenting them again.

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.



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.

Claims

When a Contractor has performed Roothing Maintenance to the standard required by the Network Owner, they will want to be paid. This is handled in **RAMM Contractor** using the Claims process.

The Claim line is the most basic unit of a Claim. 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.

Formal presentation of the Claim for the Contract Programme period is done using Claim Headers. 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 must read the *RAMM Contractor Best Practice* guide to understand how best to use the **RAMM Contractor** Claim process to maximise efficiency in Programmed Maintenance Contract management.

In This Chapter

Introduction to Claim Headers.....	408
Claim Maintenance Screen	409
Claim Header Maintenance	412
Claim Header Actions	415
Claim Cost Escalation	435
Claim Header Reports	455

Introduction to Claim Headers

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 Maintenance Screen

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.

See Claim Maintenance Screen (on page 409).

Claim Header Maintenance

Once you have added a Claim Header the most common actions you will take will be changing the status of the Claim Header. However, you can change some views of the List panel, show or hide Audit comments, view and maintain Claim Header Claim lines and even add a multimedia file to the Claim Header.

See Claim Header Maintenance (on page 412).

Claim Header Actions

When the individual Claim lines have been **Accepted** by the Network Owner, the Contractor must **Close Off** the Claim Header, sort out any problems with it and **Present** it to the Network Owner. When it has been paid, it can be **Completed** and the Maintenance Cost information transferred to **RAMM**.

See Claim Header Actions (on page 415).

Claim Header Reports

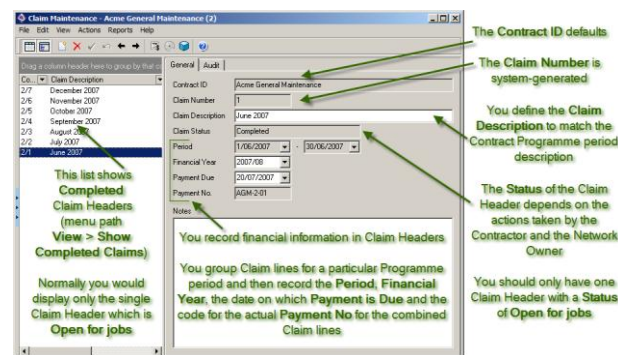
There are a number of reports which you run from the **Claim Maintenance** screen. The reports are mostly available elsewhere. You run these reports from the **Claim Maintenance** screen to limit the results to data from a particular Claim Header.

See Claim Header Reports (on page 455).

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.

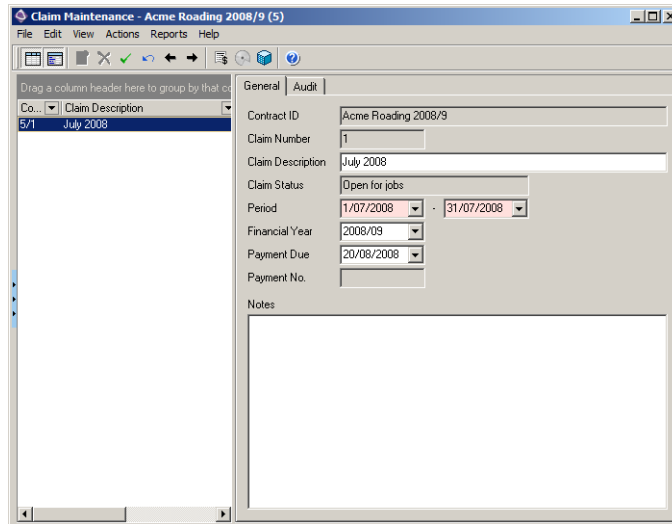
Menu Path

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.

Claim Header Maintenance

Once you have added a Claim Header the most common actions you will take will be changing the status of the Claim Header. However, you can change some views of the List panel, show or hide Audit comments, view and maintain Claim Header Claim lines and even add a multimedia file to the Claim Header.

To understand the different viewing options see:

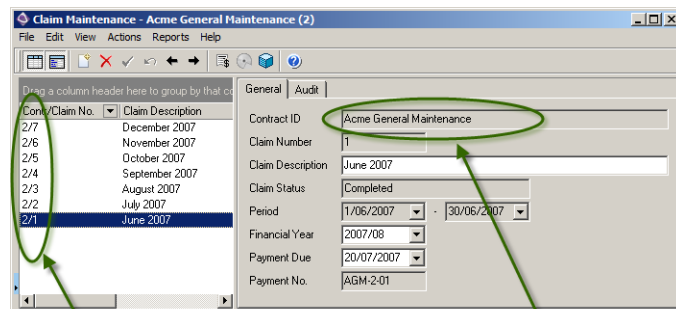
- Show the Contract Number in the List (on page 413)
- Show Completed Claims (on page 413)
- Show All Claim Audit Records (on page 414)
- List Claim Lines (on page 414).

The most common tasks you will perform will be changing the status of the Claim Header and then dealing with it as per the contract provisions. See:

- Claim Header Actions (on page 415).

Show the Contract Number in the List

You have the option when viewing the list of Claim Headers in the (unnamed) Claim Header List panel to show the number of the Contract with which the Claim Header is associated. To do this you follow the menu path View > Show Contract No. in List.



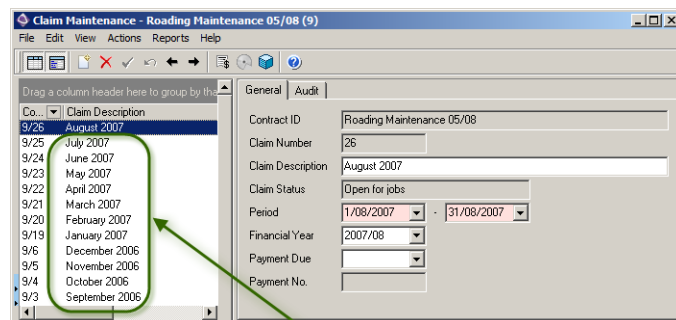
The number of the Contract (in this case 2) is prepended to the Claim Header number

The number of the Contract is no longer appended to the Contract Description which used to read Acme General Maintenance (2)

Show Completed Claims

You have the option when viewing the list of Claim Headers in the (unnamed) Claim Header List panel to show those Claim Headers with a status of Completed. To do this you follow the menu path View > Show Completed Claims.

The default is not to show these Claim Headers. Normally you would not want to display all Claim Headers. It is then much easier to ensure that you have only one Claim Header Open for jobs at any one time.

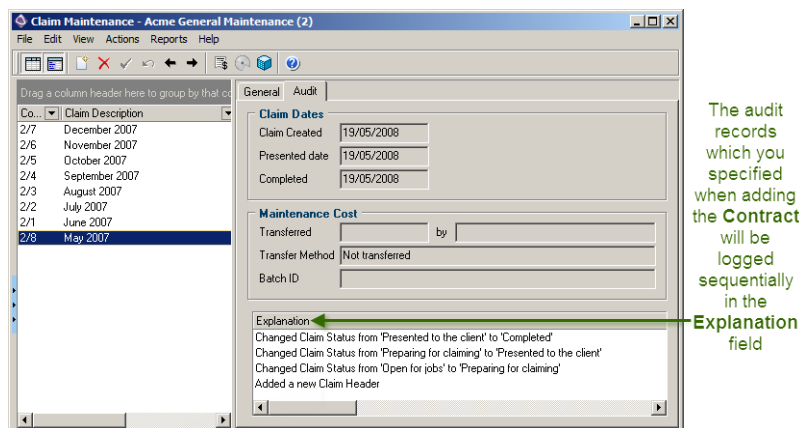


These Claim Headers have a status of Completed and are not displayed by default

Show All Claim Audit Records

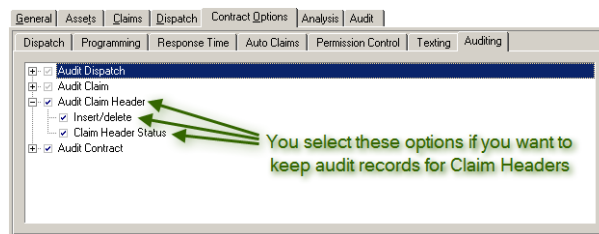
You have the option when viewing the Audit tab of the Claim Maintenance screen to view a sequential list of Claim Header audit records in the Explanation panel. To do this you follow the menu path **View > Show All Claim Audit Records**.

The default is not to show these records. Normally you would not want to display all the audit records as you should be dealing with Claim lines using the Estimate Review Tool.



Select Audit Records to Display


When you are setting up the Contract you select the audit records which you wish **RAMM Contractor** to keep. You do this at the Auditing tab of the Contract Options tab of the **Contact Details** maintenance screen. See Setting Audit Record Options (on page 202).

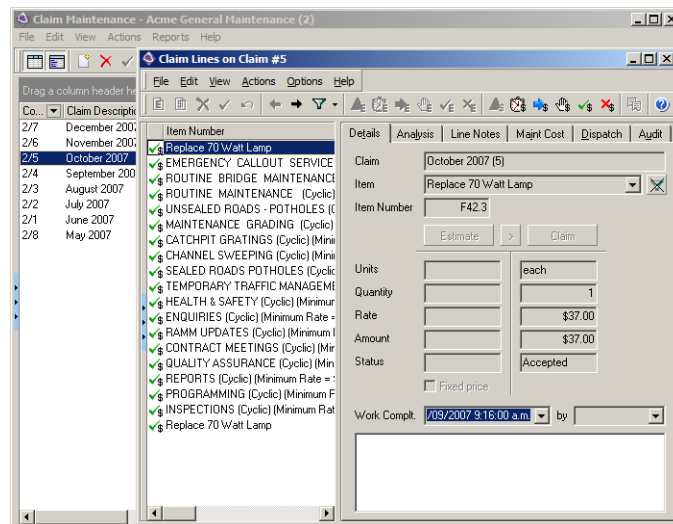


List Claim Lines

You have the option to view all Claim lines for a Claim Header. This option is an alternative to using the Claim Review Tool to review Claim lines.

You may find the Claim Review Tool more useful than this option.

To view all Claim lines for a Claim Header you follow the menu path **View > Claim Lines** or press .



Claim Header Actions

When the individual Claim lines have been **Accepted** by the Network Owner, the Contractor must **Close Off** the Claim Header, sort out any problems with it and **Present** it to the Network Owner. When it has been paid, it can be **Completed** and the Maintenance Cost information transferred to **RAMM**.

You can perform the following actions:

- Prepare Claim**
 (CTRL+E) When there are no more Claim lines to be added to a Claim Header for a particular Programme period, you need to close off the Claim Header in preparation for presenting it. You follow the menu path **Actions > Prepare Claim** to change the Claim Status from **Open for jobs** to **Preparing for claiming**. This action locks the Claim Header so that no more Claim lines can be added to it, while it is being prepared for **Presentation**. You can do this only if a Claim Header has a status of **Open for jobs**. See Claim Preparation (on page 416).
- UnPrepare Claim**
 (CTRL+U) If you have made an error and need to add one or more Claim lines to a Claim Header with the status of **Preparing for claiming** you follow the menu path **Actions > UnPrepare Claim** to change the Claim Status from **Preparing for claiming** to **Open for jobs**. You can do this only if a Claim Header has a status of **Preparing for claiming**.

- **Present Claim**
(CTRL+P) When a Claim Header has been properly Prepared it is then Presented to the Network Owner for payment in full. The Claim lines for a Claim Header with a status of Presented to the client can not be changed. You follow the menu path Actions > Present Claim to change the Claim Status from Preparing for claiming to Presented to the client. You can do this only if a Claim Header has a status of Preparing for claiming or Open for jobs.
See Presenting the Claim (on page 423).
- **UnPresent Claim**
(CTRL+U) If you have made an error and need to make changes to one or more Claim lines to a Claim Header with the status of Presented to the client you follow the menu path Actions > UnPresent Claim to change the Claim Status from Presented to the client to Preparing for claiming. You can do this only if a Claim Header has a status of Presented to the client. You should avoid using this option unless absolutely necessary or specifically instructed to do so.
- **Complete Claim**
(CTRL+O). When the Contractor has been paid in full for the Claim, they Complete the Claim Header. This closes off the Claim Header which then becomes historical. No further changes can then be made to the Claim Header. Now is the time to transfer Maintenance Costs to RAMM if required.
See Claim Completion (on page 429).
- **Transfer to RAMM Maintenance Costs**
When the claim has been paid in full and completed, the Contractor should transfer the information related to the claim to the RAMM database so that it is up to date.
See Claim Maintenance Cost Information (on page 434).
- **Generate Lump Sum Claim Lines**
There may be Contract activities for which the Contractor is paid a Lump Sum for each Programme period. If so, these need to be charged. You follow the menu path Actions > Generate Lump Sum Claim Lines to open the Lump Sum screen.
See Generate Lump Sum Claim Lines (on page 432).

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.

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 474).
- addressed the **Held** Claim lines. You do this using the Claim Review Tool. See **Addressing Held Claims**.
- 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 410).

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.

- 2 Follow the menu path **Actions > Prepare Claim**.
A **Confirmation** dialog will open advising that the Claim Header status will be **Preparing**.
- 3 Press .
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.

Item Description	Item No.	Quantity
INSPECTIONS (Cyclic) (Minimum Rate = \$2500.00)	A1	1
PROGRAMMING (Cyclic) (Minimum Rate = \$2000.00)	A2	1
REPORTS (Cyclic) (Minimum Rate = \$2500.00)	A3	1
QUALITY ASSURANCE (Cyclic) (Minimum Rate = \$200.00)	A4	1
CONTRACT MEETINGS (Cyclic) (Minimum Rate = \$50.00)	A5	1
RAMM UPDATES (Cyclic) (Minimum Rate = \$500.00)	A6	1
ENQUIRIES (Cyclic) (Minimum Rate = \$1000.00)	A7	1
HEALTH & SAFETY (Cyclic) (Minimum Rate = \$1000.00)	A8	1
TEMPORARY TRAFFIC MANAGEMENT (Cyclic) (Minimum Rate = \$1000.00)	A9	1
SEALED ROADS POTHoles (Cyclic) (Minimum Rate = \$15.00)	B1	1
CHANNEL SWEEPING (Cyclic) (Minimum Rate = \$15.00)	C1	1

- 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 474).
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 419).
- 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 410).
- prepared the Claim Header which you are going to **Present**. You do this at the **Claim Maintenance** screen. See *Preparing the Claim* (on page 417).
- a copy of the contract to which to refer if necessary

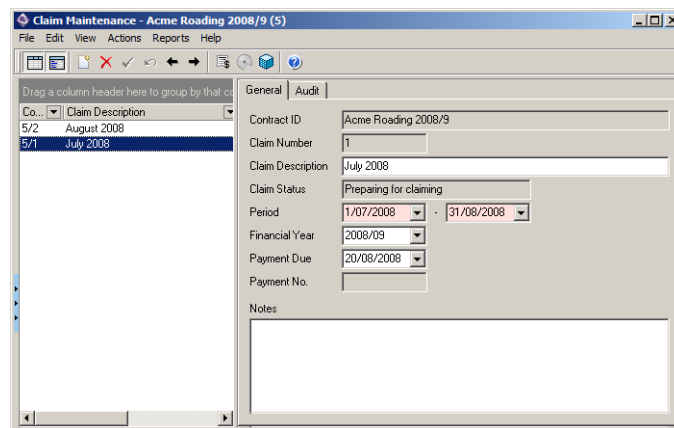
Menu Path


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

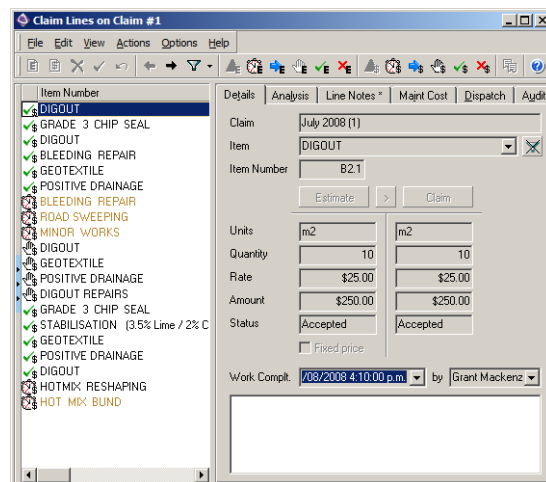
► To Address Disputed Claim Lines


To do this you follow these steps:

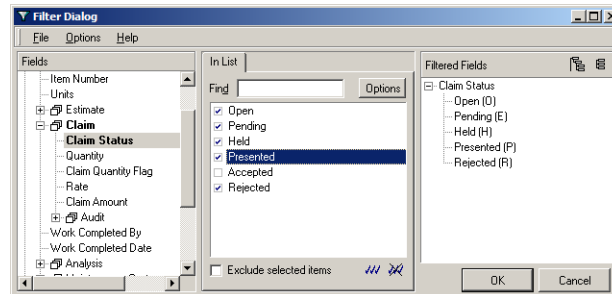
- 1 Select the Claim Header which you want to Present.



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



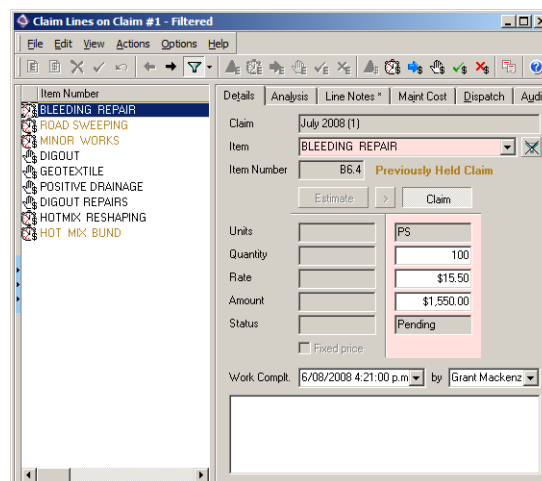
- 3 Press  to open the **Filter Dialog**.



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

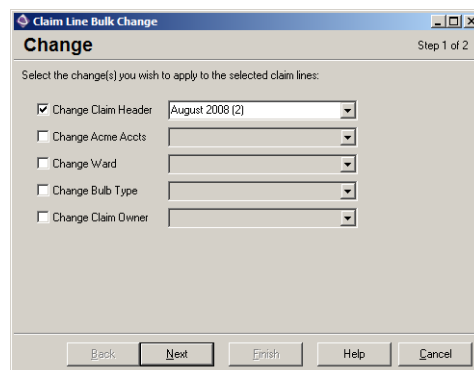
5 Press

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.

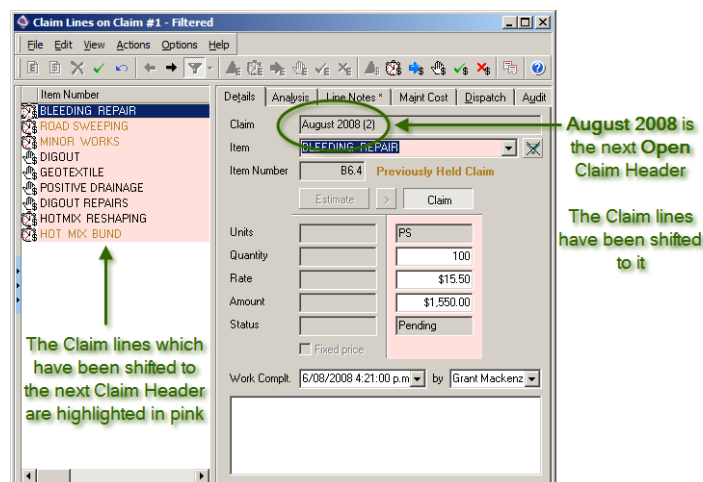
The **Claim Line Bulk Change** screen will open at the Change panel.



- 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 .
- 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 .
- You will be returned to the **Change** panel.
- 12 Go to step 3 and correct the errors.
 - 13 Press .
- 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 410).
- addressed the disputed Claim lines. You do this at the **Claim Lines** list screen. See Addressing Disputed Claim Lines (on page 419).

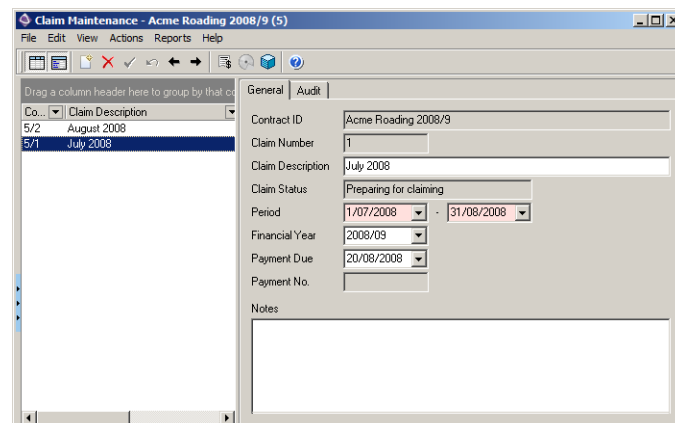
Menu Path

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

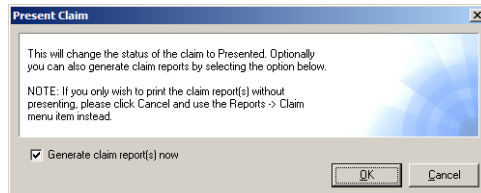
► To Present the Claim

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.



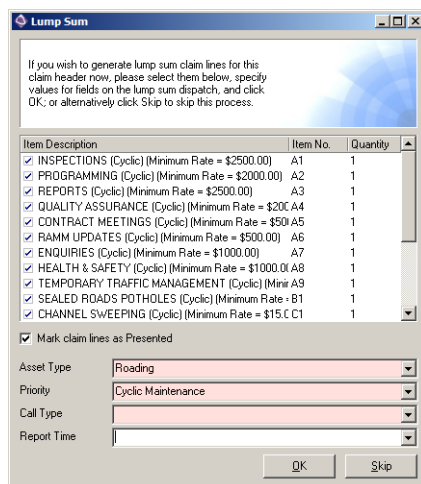
- 2 Follow the menu path **Actions > Present Claim**. A **Confirmation** dialog will open advising you that the status of the Claim Header will be changed to **Presented**.



- 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.





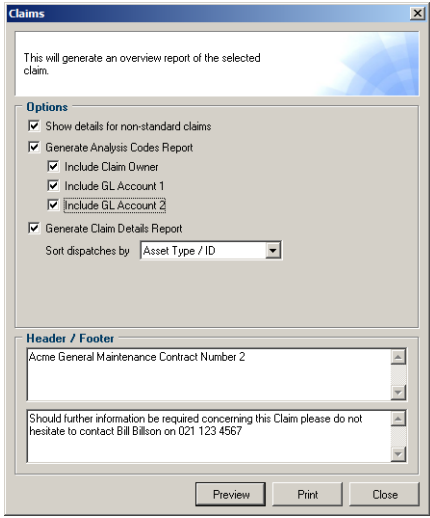
- 5 Do you want to generate a Dispatch with Lump Sum Claim lines for this Claim Header?

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.



This will generate an overview report of the selected claim.

Options

- ☒ Show details for non-standard claims
- ☒ Generate Analysis Codes Report
 - ☒ Include Claim Owner
 - ☒ Include GL Account 1
 - ☒ Include GL Account 2
- ☒ Generate Claim Details Report

Sort dispatches by: Asset Type / ID

Header / Footer

Acme General Maintenance Contract Number 2

Should further information be required concerning this Claim please do not hesitate to contact Bill Billson on 021 123 4567

Preview Print Close



You can have the details of nonstandard Claims in the report

You can simultaneously run the Analysis Codes and the Claim Details reports

You can sort the results by Asset Type, Dispatch ID, Date Entered or Road

You can set default report Headers and Footers when setting up the Contract.

You can override these values before running the report if required

- 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.

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.



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.

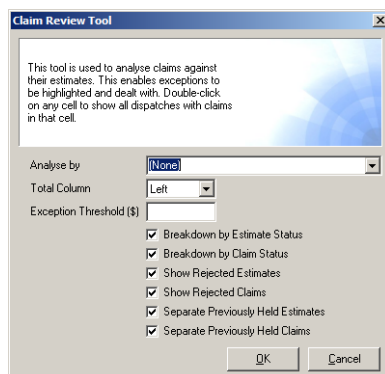
Menu Path

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.

The screenshot shows the 'Claim Review Tool' window. It contains a table with columns for Claim Status, Total, No Estimates, Open, Presented, Accepted, Claimed Value, Open, Presented, and Accepted. The table is divided into 'Estimates (Matching)' and 'Estimates (Not Matching)' sections. Green circles and arrows highlight specific values and provide explanations:

- Accepted:** \$12,412.50 (Total), \$1,702.50 (No Estimates), \$8,210.00 (Claimed Value). Annotation: "You Accepted these Claim lines earlier so no action is required for them".
- Presented:** \$17,079.75 (Total), \$17,079.75 (No Estimates). Annotation: "These Presented Claim lines should be the monthly Lump Sum payments and can be Accepted in bulk".
- Total Claims:** \$29,492.25 (Total), \$18,782.25 (No Estimates), \$8,210.00 (Claimed Value). Annotation: "The Lump Sum payments have no corresponding Estimate lines as their price is fixed".
- Estimates (Not Matching):** \$2,500.00 (Claimed Value), \$1,750.00 (Estimated Value), \$750.00 (Over/Under Esti...). Annotation: "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.

- 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.

Accepted	\$12,412.50	\$1,702.50	\$8,210.00
Presented	\$17,075.00		
Total Claims	\$29,487.50		\$8,210.00

- 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.

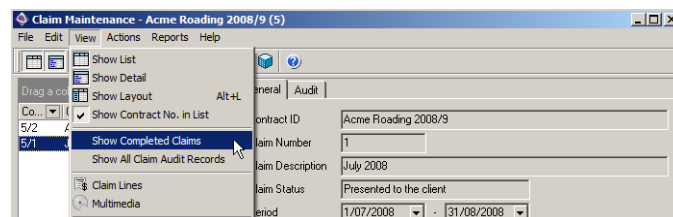
Claim Review Tool									
Claim Status	Total	No Estimates	Estimates (Matching)			Estimates (Not Matching)			
			Open	Presented	Accepted	Claimed Value	Open	Presented	Accepted
						Claimed Value			
						Estimated Value			
						Over/Under Esti...			
Accepted	\$29,492.25	\$18,782.25			\$8,210.00	Claimed Value			\$2,500.00
						Estimated Value			\$1,750.00
						Over/Under Estimal			\$750.00
Total Claims	\$29,492.25	\$18,782.25			\$8,210.00	Claimed Value			\$2,500.00
						Estimated Value			\$1,750.00
						Over/Under Esti			\$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.

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 423).
- been paid in full by the Network Owner.

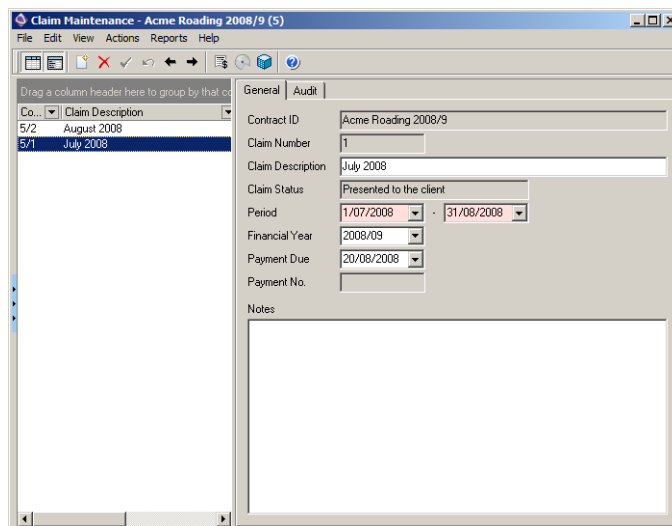
Menu Path

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

► To Complete the Claim

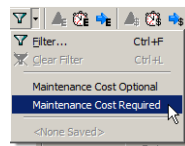
To do this you follow these steps:

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

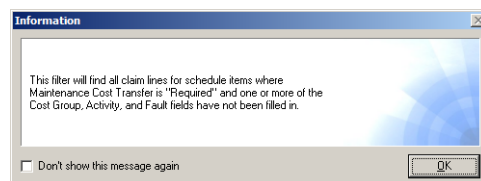


- 2 Press . The **Claim Lines on Claim #** screen will open.

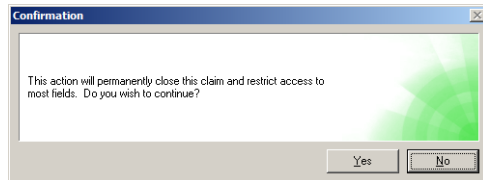
- 3 Follow the menu path Filter > Maintenance Cost Required.




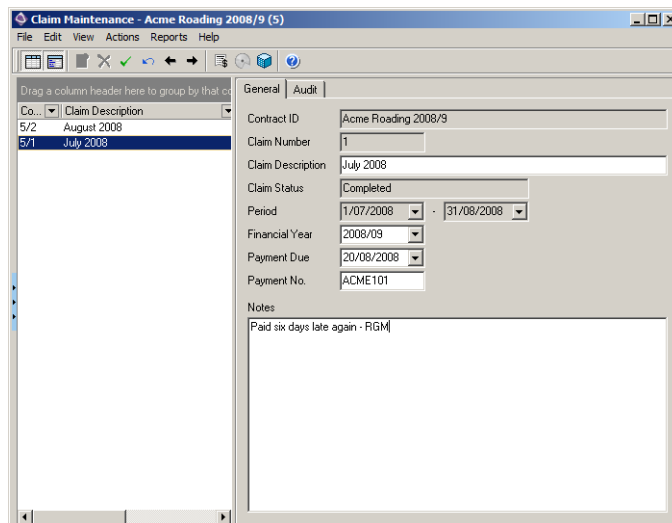
An **Information** screen will open telling you that all the Claim lines where the Maintenance Costs are Required but not present will be listed.




- 4 Press **OK**.
- 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.

Generate Lump Sum Claim Lines

When you set up your Schedule Items, you have the option to define them as Lump Sum items.

You do this at the General section on the General tab of the **Contract Schedule Items** maintenance screen. See Introduction to CSIs (on page 234).

Lump Sums are Claims as per the contract. So it is standard practice to include them with a Programme Period Claim.

A Contractor generates the Lump Sum Claim at the **Claim Maintenance** screen by following the menu path Actions > Generate Lump Sum Claim Lines. This opens the **Lump Sum** screen.

Only those Schedule Items whose Item Type has been defined as Lump Sum will appear in the List panel

You generate Lump Sum Claim lines by a combination of Asset Type, Priority code and Call Type code

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 POTHOLE (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: Administration

Priority: Cyclic Maintenance

Call Type: Staff

10% Audit:

You select Lump Sum Schedule Items from the list and a combination of Asset Type, Priority code, Call Type and Dispatch Group if you use them. The Dispatch Group field shown above is the 10% Audit field.

When you press the **OK** button, **RAMM Contractor** generates a Dispatch with the Claim lines added. An **Information** screen will open with the Dispatch ID.

You can then open the Dispatch and the Lump Sum Claim lines will be set as Presented.

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 430).
- selected the Show Completed Claims menu option under View or the Completed Claim Header will not appear in the list.

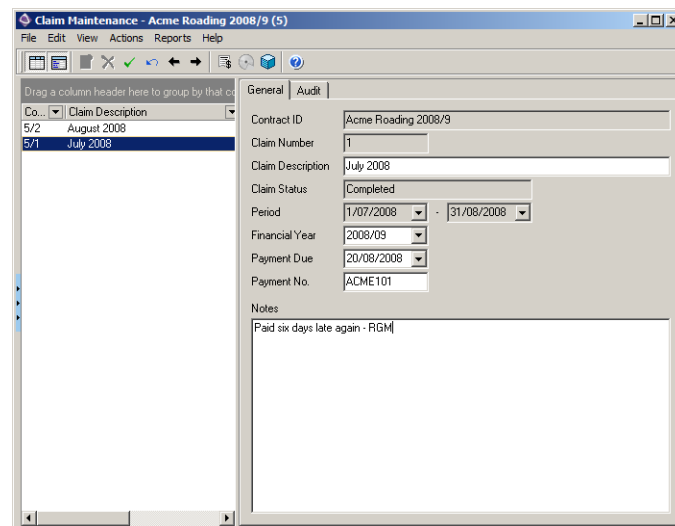
Menu Path

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.



The screenshot shows a software window titled "Claim Maintenance - Acme Roading 2008/9 (5)". On the left is a list of claims with columns for "Co..." and "Claim Description". Two items are visible: "5/2 August 2008" and "5/1 July 2008". The "5/1 July 2008" item is selected. On the right is a form with the following fields:

- Contract ID: Acme Roading 2008/9
- Claim Number: 1
- Claim Description: July 2008
- Claim Status: Completed
- Period: 1/07/2008 - 31/08/2008
- Financial Year: 2008/09
- Payment Due: 20/08/2008
- Payment No.: ACME101
- Notes: Paid six days late again - RGM

- 2 Follow the menu path Actions > Transfer to RAMM Maintenance Cost. A **Confirmation** dialog will open asking if your 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.

Claim Cost Escalation

Cost Escalation is a Contract provision to allow groups of Contract costs to be increased during the term of the Contract. The escalation is by an agreed percentage and frequency. It commences from an agreed Initiation Date. The rate of Cost Escalation may vary by item. Contract items subject to the same Cost Escalation imperatives are grouped under the same Cost Escalation Category.

Cost Escalation Set Up

You cannot apply Cost Escalation to Claims unless you have set it up. You must enable Cost Escalation, define Cost Escalation Categories and associate CSIs with them. See Cost Escalation Set Up Process (on page 277).

The Effect of Applying Cost Escalation

When you Apply Cost Escalation, there are two main results.

The first outcome is that the CSI rates are increased by the percentage you define for the Cost Escalation Category associated with the CSI. So if a CSI is not associated with a Cost Escalation Category, there will be no increase in the CSI rate. Also, if no percentage increase is specified for the Cost Escalation Category associated with the CSI, there will be no increase in the CSI rate. The CSI rate increase is applied to existing Claim lines associated with an Open Claim Header.

The second outcome is that the Cost Escalation is applied in arrears to Presented and Closed Claims whose Claim Header End Date is within the range specified for Cost Escalation.

Introduction to Cost Escalation

When a Network Owner and a Contractor agree that the increase in the cost of Claims will be recognised and that adjustments to CSI rates will apply during the currency of the Contract they can use Cost Escalation in **RAMM Contractor** to implement this.

It Is Applied to CSI Rates

Cost Escalation is the application of an agreed percentage increase to CSI rates. CSIs with similar cost-increase profiles are grouped by Cost Escalation Category. When Cost Escalation is applied, the user can apply different percentage increases or decreases to the different Cost Escalation Categories.

Application to Claim Lines

Applying Cost Escalation can alter individual Claim lines. In order for the quantum of a Claim resulting from an individual Claim line to be increased (or decreased), as a result of Cost Escalation, the Claim line must be:

- based on a CSI associated with a Cost Escalation Category which has had an increase applied and
- associated with a Claim Header whose End Date falls within the date range defined when Cost Escalation was applied or
- associated with an Open Claim Header.

Frequency of Application

When Cost Escalation is set up, a Cost Escalation Frequency is selected. Possible values are:

- Monthly
- Quarterly
- Six-monthly
- Yearly.

Users can apply Cost Escalation at any time. It is envisioned that they would apply it as per the selected frequency value.

Cost Escalation and Open Claims

All Claim lines are associated with a Claim Header (sometimes referred to as a Claim Number). Claim Headers can exist in a number of states. When certain actions have been taken, no further Claim lines can be added to a Claim Header. See Claim Header Actions (on page 415).

Until these actions have been taken, changes are permitted to the Claims. So when Cost Escalation is applied to a CSI rate for a Claim line which is associated with an Open Claim Header, **RAMM Contractor** updates the CSI rate in the Claim line. This will alter the amount Claimed.

See Open Claims and Cost Escalation (on page 438).

Cost Escalation and Closed Claims

When a Claim Header is in a state where no changes are permitted to the Claim lines, it is described as Closed. When you apply Cost Escalation to Closed Claims, the historical Claim lines remain unchanged. A new Dispatch is created with Claim lines representing the sum total increase per CSI.

See Closed Claims and Cost Escalation (on page 440).

Application of Cost Escalation

When a rate of escalation has been determined, you apply Cost Escalation in arrears. You run Cost Escalation at the **Contract Schedule Items** screen. See Applying Cost Escalation (on page 446).

Cost Escalation Reversal

If, when applying Cost Escalation, you have made an error you may wish to reverse your changes. You can do this only if the Claim Header with which the Cost Escalation Claim lines are associated, remains Open. See Reversing Cost Escalation (on page 449).

Fixing Cost Escalation Errors

If, when applying Cost Escalation, you have made an error and the Cost Escalation Claim has already been **Presented**, the Cost Escalation process cannot be reversed. In this case you need to use a different method to fix the error. See **Error Reversal Example** (on page 451).

Cost Escalation CSI Rates Report

You view the **Cost Escalation CSI Rates** report to see the changes in CSI rates caused by the application of Cost Escalation. See **Cost Escalation and CSI Rates** Report (on page 469).

Open Claims and Cost Escalation

Claim Headers (sometimes referred to as Claim Numbers) are used to group Claim lines.

When Claim Headers have a status of **Open**, more Claim lines can be associated with the Claim Header. Claim lines which have already been associated with the Claim Header can also be changed. This determines the manner in which Claim lines associated with an **Open** Claim Header are handled when Cost Escalation is applied.

The Effect of Cost Escalation

Cost Escalation is applied in arrears to CSIs.

When Cost Escalation is applied to a CSI rate for a Claim line which is associated with an **Open** Claim Header, **RAMM Contractor** updates the CSI rate in the Claim line. This will alter the amount Claimed.

Open Claim Line Example

In the example below, a Claim has been made for four potholes in Aberdeen Road. The Current Rate for the CSI is \$114.69 each. The Claim line is associated with the September 2011 Claim Header which is **Open**.

The Pothole CSI is used in a Claim line

Current Rate of \$114.69 is used

Cost Escalation is then run for the Hotmix Cost Escalation Category at the rate of 10%.

Select Cost Escalation Categories

Please enter percentage values for each Cost Escalation Category you wish to apply.

NZTA Maintenance Fluctuat		%
Metal		%
Hotmix	10	%
Aggregate		%
Material Other		%
Clothing		%

Back Next Cancel

The result of applying Cost Escalation to the Hotmix Cost Escalation Category at the rate of 10% is that all of the CSIs associated with the Hotmix Cost Escalation Category will have their Agreed Rate increased by 10%.

The CSI Pothole is associated with the Hotmix Cost Escalation Category. So its agreed Rate will change from \$114.69 to \$126.16.

Any existing Claim lines which are associated with the Hotmix Cost Escalation Category are then changed so that the Claim line rate is the new Agreed Rate. In the Graphic below, the Rate has changed from \$114.69 to \$126.16.

Cost Escalation has been applied to the Pothole CSI which is used in a Claim line

Rate for CSI and Claim Line has increased to \$126.16 after Cost Escalation was applied

Closed Claims and Cost Escalation

Claim Headers (sometimes referred to as Claim Numbers) are used to group Claim lines.

When Claim Headers have a status of **Closed**, no more Claim lines can be associated with the Claim Header. Claim lines which have already been associated with the Claim Header cannot be changed. This determines the manner in which Claim lines associated with an **Closed** Claim Header are handled when Cost Escalation is applied.

The Effect of Cost Escalation

Cost Escalation is applied in arrears to CSIs. When Cost Escalation is applied to a CSI rate for a Claim line which is associated with a **Closed** Claim Header, **RAMM Contractor** does not update the CSI rate in the Claim line. Changing an amount that has already been claimed would be a sub optimal business practice.

Claim Lines in a New Dispatch

When Cost Escalation is applied, historical Claim lines are not updated.

RAMM Contractor identifies all Claim Headers whose End Date is within the range specified when Cost Escalation is applied. For these Claim Headers, **RAMM Contractor** then checks each Claim line. If the CSI on which it is based is associated with a Cost Escalation Category which has been subject to a percentage increase, **RAMM Contractor** then creates a new Dispatch. It creates one Claim line for each affected CSI.

It sums the increments for each CSI so that there is one total per line.

Example

In the Open Claim Header example above, a Claim was made for four potholes in Aberdeen Road. See Open Claims and Cost Escalation (on page 438). The Current Rate for the CSI at the time of the Claim was \$114.69 each. The new Agreed Rate became \$126.16.

If the same Claim line had been associated with a Closed Claim Header, **RAMM Contractor** would have generated a new Dispatch and inserted a Claim line for \$45.88. This is the difference between the old and new rates (\$11.47), multiplied this by four (the number of potholes). This becomes the Cost Escalation Claim.

Below is an example of a Dispatch generated when Cost Escalation is applied to a Closed Claim.

The screenshot shows the 'Dispatch - Custom Filter' window. The title bar is 'Dispatch - Custom Filter'. The menu bar includes File, Edit, View, Actions, Reports, Options, and Help. The toolbar has icons for various actions. The main window is titled 'Roading Dispatch - 40/951' and is marked as 'Complete'. The 'Contract' field is 'Road Mice Contract 1051 (40)'. The 'Call Type' is 'Staff', 'Priority' is 'Programmed / Quoted', 'External ID' is empty, 'Assigned To' is empty, 'Running Time' is 'Immediate', and 'Fault' is 'Cost Escalation'. The 'General' tab is selected, showing a list of 'Item Number' with checkboxes: 'Unsealed P/H Aggregate', 'Grading 282 km (l)', 'Aggregate EW.M.', and 'In-situ stabilising'. The 'Details' tab is also visible, showing 'Claim Number' as 'September 2011 (6)', 'Item' as 'Unsealed P/H Aggregate (EW.M40)', 'Item Number' as 'B2.2', 'Units' as 'm3', 'Quantity' as '10', 'Rate' as '\$400.06', 'Amount' as '\$400.06', and 'Status' as 'Accepted'. The 'Est Total' is '\$14400.75' and the 'Claim Total' is '\$14400.75'. Green annotations with arrows point to specific elements: 'The Cost Escalation Dispatch is Locked by default' points to the 'Complete' status; 'The Dispatch Fault Category is Cost Escalation' points to the 'Fault' dropdown; 'One Claim line is produced for each CSI to which Cost Escalation was applied' points to the 'Item Number' list; and 'The Claim line details are unable to be entered or edited' points to the 'Details' tab.

Cost Escalation Dispatches

In the example above, four CSIs have had Cost Escalation applied. This resulted in four Claim lines being generated in a Cost Escalation Dispatch.

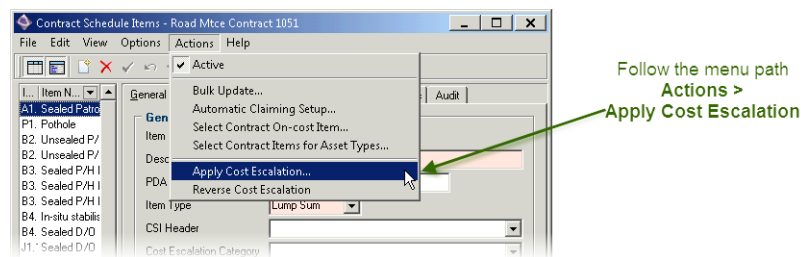
The Dispatch is locked. No changes can be made to the Dispatch. The default Fault Category for the Dispatch is Cost Escalation.

If you need to delete the Dispatch, you can reverse the application of Cost Escalation. You can do this only if the Claim Header with which the Dispatch is associated remains Open. See Reversing Cost Escalation (on page 449).

If you need to alter the effect of the Dispatch and the Claim Header with which the Dispatch is associated is now Closed, there is a different process to fix the error. See Reverse a Mistake (on page 450).

Apply Cost Escalation

Cost Escalation is applied to CSIs. So when you want to apply Cost Escalation, you do this at the **Contract Schedule Items** screen. You follow the menu path **Actions > Apply Cost Escalation**.



Cost Escalation Wizard

You use the **Cost Escalation Wizard** to apply Cost Escalation. This ensures that all the steps are performed.

Cost Escalation Options

When you use the **Cost Escalation Wizard** to apply Cost Escalation, you first select the start date, Open Claim Header and Dispatch parameter values.

Cost Escalation Start Date

You select the date from which Cost Escalation will apply at the **Cost Escalation Start Date** drop-down calendar. This would normally be the first day of the most recently completed Cost Escalation frequency period.

Cost Escalation will then be applied to all Claims whose **End Date** is in the date range from the **Cost Escalation Start Date** until the date of Cost Escalation application.

Open Claim Header

You select an **Open Claim Header** for the new Dispatch which will be created. It will contain Claim lines which are the difference between what has already been Claimed and what would have been Claimed had Cost Escalation been applied to the CSIs at the time of Claiming.

The Dispatch Claim lines are generated only for Claim lines associated with any **Closed Claims** to which Cost Escalation is applied. See **Closed Claims and Cost Escalation** (on page 440).

You select the **Open Claim Header** from the **Open Claim Header** drop-down list.

Dispatch Parameters

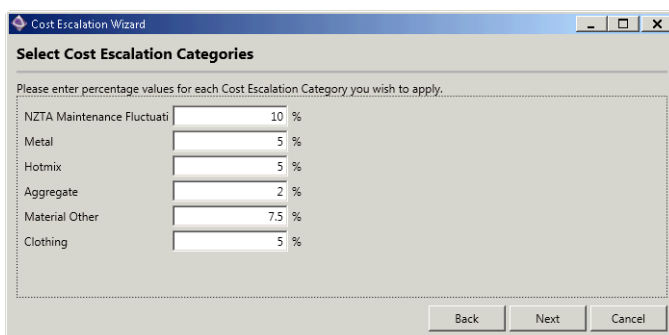
The Dispatch generated by the Cost Escalation process will have a **Fault Category** of **Cost Escalation** by default. You select the **Asset Type**, **Call Type** and **Priority** Dispatch parameters according to your standard operating procedures.

Select Cost Escalation Categories

Once you have selected the initial Cost Escalation parameters, you define the rates of Cost Escalation to be applied.

Rates

When you use the **Cost Escalation Wizard** to apply Cost Escalation, you define the Cost Escalation percentage increase or decrease for each Cost Escalation Category. You do this at the **Select Cost Escalation Categories** panel.



Category	Percentage
NZTA Maintenance Fluctuat	10 %
Metal	5 %
Hotmix	5 %
Aggregate	2 %
Material Other	7.5 %
Clothing	5 %

Cost Escalation Categories

Cost Escalation Categories are **RAMM Contractor** items used to group CSIs which are subject to the same rate of Cost Escalation during the currency of a Maintenance Contract. You define Cost Escalation Categories at the **Cost Escalation Category** screen. See Defining Cost Escalation Categories (on page 278).

All the Cost Escalation Categories which you have defined for the Contract will be available at the **Select Cost Escalation Categories** panel. Where Cost Escalation is to be applied, you enter a percentage value. Where there is no change, you leave the field blank.

Negative Percentages

Normally you would apply positive percentages so that the amount of the Claim is increased. If the Contract allows, you can enter negative percentage values to decrease the value of the Claim.

The other time you might enter negative percentage values would be when you had made an error in the application of Cost Escalation and you need to follow a process to fix the error. See Reverse a Mistake (on page 450).

Summary of Changes

Once you have selected the initial Cost Escalation parameters and defined the rates of Cost Escalation to be applied, you will want to check that the changes you have made are satisfactory before you apply them.

Cost Escalation Wizard

Summary of Changes

Please review the changes that will be made and make sure they are acceptable before clicking Apply.

Schedule Item Changes

Grouped by: Category

Item No	Description	Tendered Rate	Current Rate	New Rate
Hotmix				
P1.1	Pothole	\$100.0000	\$138.7786	\$145.7175
B3.2	Sealed P/H Repair pre-mix	\$0.0000	\$346.9466	\$364.2939
Aggregate				
B1.1	Grading 282 km (p/m)	\$0.0000	\$47.8192	\$48.7756
B2.2	Unsealed P/H Aggregate (EW.M40)	\$0.0000	\$44.6160	\$45.5083
B4.1	In-situ stabilising (150mm) 1-149 m2	\$0.0000	\$32.0320	\$32.6726

Claim Line Changes

Description	Original Amount	New Amount	Difference
Claim Lines	\$10,156.93	\$10,397.01	\$240.08
Estimates	\$563.96	\$592.35	\$28.39
Total	\$10,720.89	\$10,989.36	\$268.47

Print Back Apply Cancel

CSI Rate Changes

The default view at the Schedule Item Changes section on the **Summary of Changes** panel of the **Cost Escalation Wizard** is to display affected CSIs grouped by Cost Escalation Category.

The **Tendered Rate** is the initial rate for the CSI in the Contract.

The **Current Rate** is the rate for the CSI prior to this application of Cost Escalation.

The **New Rate** is the rate for the CSI if you press Apply. If you cancel your changes the **New Rate** will not be applied.

Claim Line Changes

The default view at the Claim Line Changes section on the **Summary of Changes** panel of the **Cost Escalation Wizard** is to display and sum the original totals, the new totals and the differences in the Claim line and Estimate line totals if Cost Escalation were to be applied as configured.

Applying Cost Escalation

Introduction

Cost Escalation is a Contract provision to allow groups of Contract costs to be increased during the term of the Contract. Once the rate of Cost Escalation has been agreed, it can be applied.

Before you do this you need to have:

- defined your **Cost Escalation Categories**. You do this at the **Cost Escalation Category** screen. See **Defining Cost Escalation Categories** (on page 278).
- enabled Cost Escalation. You do this at the **Claim Options** tab of the **Contract Details** screen. See **Enabling Cost Escalation** (on page 281).
- associated **Cost Escalation Categories** with CSIs. You do this at the **Contract Schedule Items** maintenance screen. See **Associating a Cost Escalation Category with a CSI** (on page 284).
- selected your **Contract Asset Types**. You do this at the **Add Asset Types** screen. See **Selecting Contract Asset Types** (on page 53).
- added your **Dispatch Call Types**. You do this at the **Call Types** maintenance screen. See **Adding Dispatch Call Types** (on page 102).
- added your **Priority** codes. You do this at the **Priority** tab on the **Dispatch** tab of the **Contract Details** screen. See **Adding Priority Codes** (on page 149).
- agreed the rates of Cost Escalation.

Menu Path

Follow the menu path **Maintenance > Contract Details > (press Schedule Items) > Actions > Apply Cost Escalation** to open the **Cost Escalation Wizard** at the **Cost Escalation Options**.

► To Apply Cost Escalation

Cost Escalation Wizard

Cost Escalation Options

This tool is designed to alter the rates of the Contract Schedule Items and apply the new rates to existing Claim Lines. For detailed instructions, please see the help documents.

Cost Escalation Start Date: 1/07/2011 12:00 a.m.

Open Claim Header: September 2011

Dispatch Options

A Dispatch will be added for the historical Claim Lines. Please choose the appropriate options for this Dispatch

Asset Type: Roading

Call Type: Council

Priority: Programmed / Quoted Works

Next Cancel

To do this you follow these steps:

- 1 Select, from the **Cost Escalation Start Date** drop-down calendar, the date from which this application of Cost Escalation will apply. Normally this would be the first day of the most recently completed Cost Escalation frequency period.
- 2 Select, from the **Open Claim Header** drop-down list, the Claim Header with which the Claim lines, created as a result of this application of Cost Escalation, will be associated.
- 3 Select, from the **Asset Type**, **Call Type** and **Priority** drop-down lists, the parameters for the Dispatch which will be generated as a result of this application of Cost Escalation.
- 4 Press **Next**.
The **Cost Escalation Options** panel will close and the **Select Cost Escalation Categories** panel will open.

Cost Escalation Wizard

Select Cost Escalation Categories

Please enter percentage values for each Cost Escalation Category you wish to apply.

NZTA Maintenance Fluctuat	10 %
Metal	5 %
Hotmix	5 %
Aggregate	2 %
Material Other	7.5 %
Clothing	5 %

Back Next Cancel

- 5 Type, in the fields named for each Cost Escalation Category you have created, the rate of Cost Escalation.
- 6 Press **Next**.
The **Select Cost Escalation Categories** panel will close and the **Summary of Changes** panel will open.

Cost Escalation Wizard

Summary of Changes

Please review the changes that will be made and make sure they are acceptable before clicking Apply.

Schedule Item Changes

Grouped by: Category

Item No	Description	Tendered Rate	Current Rate	New Rate
Hotmix				
P1.1	Pothole	\$100.0000	\$138.7786	\$145.7175
B3.2	Sealed P/H Repair pre-mix	\$0.0000	\$346.9466	\$364.2939
Aggregate				
B1.1	Grading 282 km (p/m)	\$0.0000	\$47.8192	\$48.7756
B2.2	Unsealed P/H Aggregate (EW.M40)	\$0.0000	\$44.6160	\$45.5083
B4.1	In-situ stabilising (150mm) 1-149 m2	\$0.0000	\$32.0320	\$32.6726




Claim Line Changes

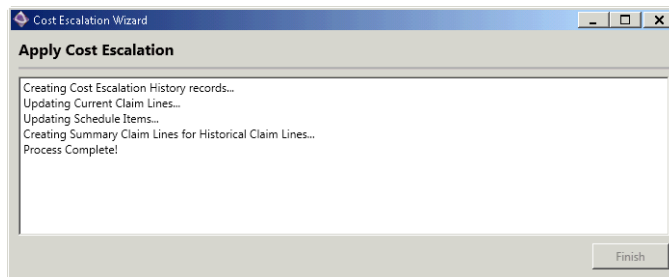
Description	Original Amount	New Amount	Difference
Claim Lines	\$10,156.93	\$10,397.01	\$240.08
Estimates	\$563.96	\$592.35	\$28.39
Total	\$10,720.89	\$10,989.36	\$268.47


Print Back Apply Cancel

- 7 Check that the changes you are about to make are appropriate.
- 8 Do you want to apply Cost Escalation to achieve the results displayed?

Yes	go to step 12.
No	go to step 9.

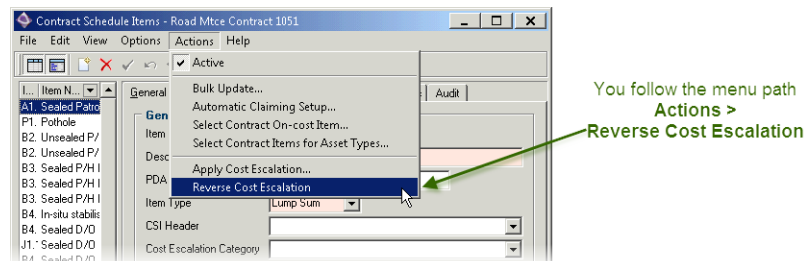
- 9 Press .
The **Cost Escalation Wizard** will close and you will be returned to the **Contract Schedule Items** maintenance screen.
- 10 Follow the menu path Actions > Apply Cost Escalation.
The **Cost Escalation Wizard** will open at the **Cost Escalation Options** panel.
- 11 Go to step 1.
- 12 Press .
The **Summary of Changes** panel will close and the **Apply Cost Escalation** panel will open. The progress of the process will display. When the process is finished and Cost Escalation has been applied, the  button will become enabled.



- 13 Press .
The **Cost Escalation Wizard** screen will close and you will be returned to the **Contract Schedule Items** maintenance screen.
- 14 Close the screen in the normal manner.

Reverse Cost Escalation

Cost Escalation is applied to CSIs. So when you want to reverse the application of Cost Escalation, you do this at the **Contract Schedule Items** screen. You follow the menu path Actions > Reverse Cost Escalation.



CSI Rates Reversal

The Cost Escalation reversal process reverses the changes to the CSI rates.

This affects the rates which you view at the **Contract Schedule Items** screen. It also affects the rates in Claim lines based on the CSI rates if the Claim lines are associated with an Open Claim Header.

Cost Escalation Dispatch

When Cost Escalation is applied to Claim lines associated with a Closed Claim Header, a Cost Escalation Dispatch is generated which includes one Claim line for each CSI affected by the application of Cost Escalation. The Claim lines sum the difference between what was Claimed and what would have been Claimed, had Cost Escalation been applied at the time of the Claim for each CSI.

When Cost Escalation is reversed, the Dispatch and its Claim lines are deleted.

Reversing Cost Escalation

Introduction

Cost Escalation is a Contract provision to allow groups of Contract costs to be increased during the term of the Contract. When Cost Escalation has been applied, the process can be reversed. You would do this if the application of Cost Escalation was incorrect. You can do this only if the Claim lines are associated with a Claim Header which remains Open.

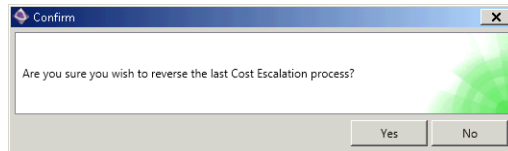
Before you do this you need to have:

- applied Cost Escalation. You do this at the **Cost Escalation Options** panel of the **Cost Escalation Wizard**. See Applying Cost Escalation (on page 446).

Menu Path

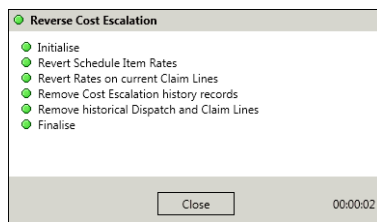
Follow the menu path Maintenance > Contract Details > (press Schedule Items) > Actions > Reverse Cost Escalation to open the **Confirm** dialog.

► To Reverse Cost Escalation



To do this you follow these steps:

- 1 Press . The **Confirm** dialog will close and the **Reverse Cost Escalation** progress panel will open showing the progress in the reversal process.



- 2 Press . The **Reverse Cost Escalation** progress panel will close and you will be returned to the **Contract Schedule Items** maintenance screen. The CSIs will be returned to the values current prior to the most recent application of Cost Escalation. The Cost Escalation Dispatch and its Claim lines will be deleted.
- 3 Close the screen in the normal manner.

Reverse a Mistake

It is possible to run Cost Escalation more than once for the same **Start Date**. You might do this if the original Cost Escalation percentage was found to be incorrect.

Cost Escalation Wizard

Cost Escalation Options

This tool is designed to alter the rates of the Contract Schedule Items and apply the new rates to existing Claim Lines. For detailed instructions, please see the help documents.

Cost Escalation Start Date: 1/04/2011 12:00 a.m.

Open Claim Header: August 2011

Dispatch Options

A Dispatch will be added for the historical Claim Lines. Please choose the appropriate options for this Dispatch

Asset Type: Roading

Call Type: Staff

Priority: Cyclic/Routine

You can run **Cost Escalation** from the same **Start Date** more than once

Next Cancel

Use a Negative Percentage

If you want to reverse Cost Escalation changes you have made, you can apply a negative percentage which is the inverse of the Cost Escalation percentage rate originally applied. This will return the CSI rates and Claim line rates which have been changed by the Cost Escalation percentage you have already applied, to the rates that they were before the original percentage rate application.






Historical Claim Lines

When you reapply Cost Escalation but with a negative percentage, this does not update historical Claim lines. Instead, a single Dispatch is created which includes one Claim line for each CSI affected by Cost Escalation.

The totals for these Claim lines generated for the Dispatch, are generated to account for the historical Claim lines which matches the Cost Escalation criteria. The Claim line amount is the difference between what was actually Claimed and what would have been Claimed had the Cost Escalation percentage been applied before the Claim was Presented.

Error Reversal Example

The following graphic shows the effects of reversing an incorrectly applied Cost Escalation percentage and then applying the correct amount. The examples are simplified for clarity.

Fix Cost Escalation Error	 CSI Agreed Rate	 Claim Lines Historical	 Claim Line Open	 Claim Lines New Dispatch	 Open Claim Total
1 Pothole	1 x pothole = \$100.00	\$500.00	\$500.00	N/A	\$500.00
2 Apply Cost Escalation at 10%	1 x pothole = \$100.00 X 110% = \$110.00	Unchanged at \$500.00	\$500.00 X 110% = \$550.00	\$550.00 - \$500.00 = \$50.00	\$600.00
3 Apply Cost Escalation at -9.09091%	1 x pothole = \$110.00 X -9.09091% = \$100.00	Unchanged at \$500.00	\$550.00 X .909091 = \$500.00	Cost Escalation Line = \$50.00 \$500.00 - \$550.00 = - \$50.00	\$500.00
4 Apply Cost Escalation at 12%	1 x pothole = \$100.00 X 112% = \$112.00	Unchanged at \$500.00	\$500.00 X 112% = \$560.00	Cost Escalation Lines \$50.00 - \$50.00 = \$0.00 \$560.00 - \$500.00 = \$ 60.00	\$620.00

1 Pothole

This is the situation which exists before Cost Escalation is applied in error.

The Agreed Rate for pothole repair is \$100.00 each. Two pothole Claims for \$500.00 each have been made. One is associated with a Claim Header which is Closed. The second Claim is associated with an Open Claim Header.

2 Apply Cost Escalation at 10%

This is the application of Cost Escalation which is later found to be in error.

Cost Escalation is applied to the Cost Escalation Category which is associated with the Pothole CSI. The rate is 10%.

The first \$500.00 Claim is historical and so cannot be changed. So a new Dispatch is created with one Claim line being for \$50.00. This is the difference between what was originally Claimed and what would have been Claimed had the Cost Escalation rate been applied at the time of making the Claim. The new Dispatch is associated with the Open Claim Header.

The second \$500.00 Claim is associated with the Claim Header which is still Open. So when Cost Escalation is applied, the Pothole CSI value is changed from \$100.00 to \$110.00 each. The rate in the Dispatch Claim line is therefore updated.

So the total value of the Claim Header increases by \$100.00 to \$600.00.

3 Apply Cost Escalation at -9.09091 %

This is the application of negative Cost Escalation to reverse the erroneous application at the rate of 10%.

Cost Escalation is applied to the Cost Escalation Category which is associated with the Pothole CSI. It is applied at the rate which will reverse the previously applied rate of 10%. The inverse of 10 is .909091. So the negative Cost Escalation rate to be applied is -9.09091%. When it is applied, the Pothole CSI value is changed from \$110.00 back to \$100.00 each.

The first \$500.00 Claim is historical and so cannot be changed. Normally, as the CSI rate for the historical Dispatch differs from the CSI rate to which the Cost Escalation percentage is being applied, this Claim would be ignored and no action would be taken in the Cost Escalation process. As a Dispatch exists which includes only Claim lines resulting from a previous application of Cost Escalation, this triggers a response. **RAMM Contractor** creates a new Dispatch containing Claim lines which include values to counter balance the values in the original Cost Escalation Dispatch. In this case a new Dispatch is created with one Claim line being for -\$50.00.

This is the difference between what was Claimed (\$550.00) and what would have been Claimed (\$500.00) had the Cost Escalation rate been applied to the CSI rate in the historical Claim. The new Dispatch is associated with the Open Claim Header.

The \$550.00 Claim is associated with the Claim Header which is still open. So when Cost Escalation is applied, the Pothole CSI value is changed from \$110.00 to \$100.00 each. The rate in the Dispatch Claim line is therefore updated from \$110.00 each back to \$100.00 each. So the value of the Claim line reverts to \$500.00.

4 Apply Cost Escalation at 12%

This is the application of Cost Escalation at the correct rate.

Cost Escalation is applied to the Cost Escalation Category which is associated with the Pothole CSI. The rate is 12%.

The first \$500.00 Claim is historical and so cannot be changed. So a new Dispatch is created with one Claim line being for \$60.00. This is the difference between what was Claimed and what would have been Claimed had the Cost Escalation rate been applied at the time of making the Claim. The new dispatch is associated with the Open Claim Header. The two counterbalancing Dispatches of \$50.00 and -\$50.00 remain associated with the Open Claim Header.

The second \$500.00 Claim is associated with the Claim Header which is still open. So when Cost Escalation is applied, the Pothole CSI value is changed from \$100.00 to \$112.00 each. The rate in the Dispatch Claim line is therefore updated. The second Claim value increases to \$560.00.

So the total value of the Claim Header increases by \$120.00 to \$620.00.

Dispatches with Non Standard Claim Lines

The Cost Escalation percentage is applied to:

- CSI rates if the CSI is associated with the Cost Escalation Category for which Cost Escalation is being run.
- Historical Claim lines if the Claimed Rate matches the CSI rate to which Cost Escalation percentage is being applied
- Claim lines for Dispatches associated with an Open Claim Header if the Claimed Rate matches the CSI rate to which Cost Escalation percentage is being applied.

Claimed Rates which Differ from the Agreed Rate

In the example below, a pothole was claimed for at \$105.00. This differs from the Agreed Rate of 114.69. If the Contractor and the Network Owner agree to a particular price for a particular Claim line at a particular time, then it is assumed that they will have taken into account any factors which affect Cost Escalation as well as the other factors which lead to the difference between the Claimed Rate and the Agreed Rate.

So there is no need to apply Cost Escalation to this Claim line as the partners to the agreement have already taken cost inflation into account at the time the agreement on the Claim line price was made.

RAMM Software Limited
Hosted - North Shore City Council
Payment Due: 14/06/2011

User: Grant Mackenzie
Printed: Friday, 16 September 2011 8:53:35
Page: 1

Claim April 2011
Road Mtce Contract 1051
Period: Friday, 1 April 2011 - Saturday, 30 April 2011 - Status: Completed

Schedule Item	Units	Agreed Rate	Qty	Claimed Rate	Amount	Quantity to Date	Amount to Date
P1.1 Pothole	each	\$114.69	1	\$105.00	\$105.00	1	\$105.00
B3.3 Seal Patch Repair agg (EWM40)	m3	\$270.00	1	\$270.00	\$270.00	1	\$270.00
B4.3 Sealed D/O Repair-150 depth - rural	m2	\$38.00	66	\$38.00	\$2,508.00	66	\$2,508.00
E1.12 D/V - Plant & Materials	CS	\$1.00	1	\$1.00	\$1.00	1	\$1.00
E1.14 Or Cost 2			1		\$0.10	1	\$0.10
E1.13 Or Cost			2		\$0.10	2	\$0.10
F1.2 New/Replacement signs	PS	\$3.00	1	\$1.00	\$3.00	3	\$3.00
F1.5 New/Replacement sight railings	m	\$16.00	1	\$16.00	\$16.00	1	\$16.00
F1.6 Erect all signs on posts/poles	each	\$33.00	1	\$33.00	\$33.00	1	\$33.00
F1.7 Repaint existing sight/guard rails (incl posts)	m	\$8.00	1	\$8.00	\$8.00	1	\$8.00
F1.8 Repaint existing sign posts	each	\$26.00	3	\$26.00	\$78.00	3	\$78.00
F1.10 Install "W" section guard rails (incl posts)	m	\$500.00	1	\$500.00	\$500.00	1	\$500.00

The Pothole has been Claimed at a rate different from the Agreed Rate
So the Claim line amount charged will not be subject to Cost Escalation

—RAMM Contractor 2011/Build 35.0257— End of Report —Source: (f:\ClaimRpt)—

Claim Header Reports

There are a number of reports which you run from the **Claim Maintenance** screen. The reports are mostly available elsewhere. You run these reports from the **Claim Maintenance** screen to limit the results to data from a particular Claim Header.

Claim Analysis Report

The Claim/Estimate Analysis report is a Decision Cube which you can use to manipulate Claim and Estimate data for reporting purposes. It generates an analysis by Claim Year, Claim Amount and Claim Quantity by default.

See Claim Analysis Report (on page 457).

Claim Report

The Claim report is a highly configurable report for printing Claim data. You use it to list and group virtually any Claim data.

See Claim Report (on page 458).

Claim Details Report

The Claim Details report shows the details of the Dispatch, Asset and Claim line for a particular Claim Header. You group the results by Asset Type, Dispatch ID, Entered Date or Road or Location.

See Claim Details Report (on page 460).

Claim Grid - Dispatches Report

The **Claim Grid (Dispatches)** report is a highly configurable report for exporting Claim line data. You use it to list and group virtually any Claim line data to a number of formats for use outside **RAMM Contractor**. Each line of Data in the report is for one Dispatch.

See Claim Grid - Dispatches Report (on page 461).

Claim Grid - Claim Lines Report

The **Claim Grid (Claim Lines)** report is a highly configurable report for listing and grouping Claim line data for export in a number of formats for use outside **RAMM Contractor**. Each line of data in the report is for one Claim line.

See Claim Grid - Claim Lines Report (on page 462).

Special Purpose Reports

Special Purpose reports in **RAMM Contractor** are those which are specific to one customer. So whilst they are available they represent a solution which may suit only the one customer for whom they were scripted. Use these reports with care.

See Special Purpose Reports (on page 463).

Analysis Codes Detail Report

The Analysis Codes Detail report lists all items in a particular Analysis Code Group. It lists all Dispatches that contain a Claim line with each particular item for a Claim Header.

See Analysis Codes Detail Report (on page 466).

Cash Flow Forecast Report

The Cash Flow Forecast report attempts to forecast the expected cash flow for a Contract. It looks at Claim lines **Accepted** for payment, those which meet **Accepted** Estimates, are **Held** and so on. It uses this information to produce a summary of Claim lines which are confirmed for payment, those most likely to be **Accepted** for payment, less likely and so on. You then use your own judgement to forecast your cash flow.

See Cash Flow Forecast Report (on page 467).

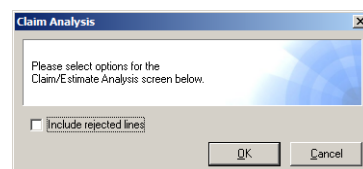
Claim Analysis Report


The Claim/Estimate Analysis report is a Decision Cube which you can use to manipulate Claim and Estimate data for reporting purposes. It generates an analysis by Claim Year, Claim Amount and Claim Quantity by default.

This report is available from the:

- **RAMM Contractor** main screen
when run from this screen Claim lines from a one or more selected Contracts are available
- **Claim** screen
when run from this screen, only the Claim lines associated with the highlighted Claim Header are available for analysis
- **Dispatch** maintenance screen
when run from this screen only the Claim lines associated with the particular set of Dispatches in the (unnamed) **Dispatch List** panel are available for analysis.

You follow the menu path Reports > Claim Analysis to open the **Claim Analysis** selection criteria screen. The only criterion for selection is whether to include **Rejected** Claim lines in the report.



Once you have decided whether to select the **Include rejected lines** option you press  to open the **Claim/Estimate Analysis** Decision Cube.

Claim/Estimate Analysis of Claim Number: 7 from: Acme General Maintenance

File Edit View Help

Fault Activity MC Activity MC Cost Group MC Fault Analysis Code Priority Road Name Dist

Claim Year: 2008

Contract Item	Claim Amount	Claim Quantity
(01) A1 INSPECTIONS (Cyclic) (Minimum Rate = \$2500.00)	\$2500.00	1.00
(02) A2 PROGRAMMING (Cyclic) (Minimum Rate = \$2000.00)	\$2000.00	1.00
(03) A3 REPORTS (Cyclic) (Minimum Rate = \$2500.00)	\$2500.00	1.00
(04) A4 QUALITY ASSURANCE (Cyclic) (Minimum Rate = \$2000.00)	\$2000.00	1.00
(05) A5 CONTRACT MEETINGS (Cyclic) (Minimum Rate = \$500.00)	\$500.00	1.00
(06) A6 RAMM UPDATES (Cyclic) (Minimum Rate = \$500.00)	\$500.00	1.00
(07) A7 ENQUIRIES (Cyclic) (Minimum Rate = \$1000.00)	\$1000.00	1.00
(08) A8 HEALTH & SAFETY (Cyclic) (Minimum Rate = \$1000.00)	\$1000.00	1.00
(09) A9 TEMPORARY TRAFFIC MANAGEMENT (Cyclic) (Minimum Rate = \$3500.00)	\$3500.00	1.00
(10) B1 SEALED ROADS POTHOLES (Cyclic) (Minimum Rate = \$6.00)	\$6.00	1.00

Claim Report

The Claim report is a highly configurable report for printing Claim data. You use it to list and group virtually any Claim data.

Reports similar to the Claim report are available elsewhere. You run this report from the **Claim Maintenance** screen to limit the results to data from a particular Claim Header.

Follow the menu path Reports > Claims to open the **Claims** selection screen.

Claims

This will generate an overview report of the selected claim.

Options

- ☒ Show details for non-standard claims
- ☒ Generate Analysis Codes Report
 - ☒ Include Claim Owner
 - ☒ Include GL Account 1
 - ☒ Include GL Account 2
- ☒ Generate Claim Details Report

Sort dispatches by: Asset Type / ID

Header / Footer

Acme General Maintenance Contract Number 2

Should further information be required concerning this Claim please do not hesitate to contact Bill Bilson on 021 123 4567

Preview Print Close

You can have the details of nonstandard Claims in the report

You can simultaneously run the Analysis Codes and the Claim Details reports

You can sort the results by Asset Type, Dispatch ID, Date Entered or Road

You can set default report Headers and Footers when setting up the Contract.

You can override these values before running the report if required

Show Details for Nonstandard Claims

Nonstandard Claims display in red. These are Claim lines where the amount claimed does not match the Estimate or where there was no Estimate.

When you run the report in the default mode with the **Show details for non-standard claims** check box cleared, the report is in portrait orientation.

When you select the **Show details for non-standard claims** check box and run the report, it has landscape orientation to make room for the Maintenance Notes. These will contain the reasons why the amount claimed does not match the Estimate or where there was no Estimate.

Generate Other Reports Simultaneously

You have the option to produce two reports at the same time as you produce the Claim report. These are:

- the Analysis Codes report and
- the Claim Details report.

You would run these other reports at the same time if you wanted to look through the summaries in the Claim report and then to check individual Claim details or Analysis code summary information.

Report Header and Footer

A contract between a Contractor and a Network Owner can prescribe information which must be available on a printed Claim report. When you are setting up a Contract you can set values in the **Claim Report Header** and **Claim Report Footer** fields which will default when a Claim report is run.

See Claim Report Headers and Footers (on page 230).

If you have set default values, then when you run the Claims report, the **Claims** report selection screen will open with the values you have chosen defaulted. You can then override the default values if required.

The Header appears once at the start of the report. The footer appears once at the end of the report. They do not appear at the top and bottom of every page.

Claim Report

The Header appears once at the start of the report, not on every page

User: Grant Mackenzie Page: 1
Printed: Wednesday, 21 May 2008 12:03:34 p.m.

Claim September 2007
Acme General Maintenance
Period: Saturday, 1 September 2007 - Sunday, 30 September 2007 Status: Presented to the client

Acme General Maintenance Contract Number 2

Schedule Item	Dispatch	Units	Agreed Rate	Qty	Claimed Rate	Amount	Quantity to Date	Amount to Date	Maintenance Notes:
B2.1	DIGOUT	m2	\$25.00	162	\$25.00	\$4,050.00	1071	\$26,775.00	
B9.1	KERB AND CHANNEL REPLACEMENT	m	\$75.00	1	\$75.00	\$75.00	1	\$75.00	
D4	DIGOUT REPAIRS	m2	\$30.00	1	\$30.00	\$30.00	157	\$4,710.00	
E6.3	MINOR WORKS	32 PS	\$1.00	1	\$50.00	\$50.00			
		42		2	\$500.00	\$500.00	16	\$3,337.00	
F2.2.2	TRUCKS - 6 Wheeled (8m3)	Hour	\$70.00	5	\$70.00	\$350.00	5	\$350.00	
Amount Claimed:						\$5,555.00			
Amount Claimed to Date:						\$350.00			

Please note:
1) The "Amount Claimed to Date" figure shown here represents the amount claimed to date for all claim lines, not just those shown here. Therefore, this amount may not equal the total Amount to Date of the individual claim lines shown on this report.
2) This "to date" figure in this report are inclusive of the current claim, as the claim is no longer Open.
Should further information be required concerning this Claim please do not hesitate to contact Bill Billson on 021 123 4567

—RAMM Contractor 2008/Build 28.0013— End of Report

Nonstandard Claims appear in Red

The Footer appears once at the end of the report, not on every page

Claim Details Report

The Claim Details report shows the details of the Dispatch, Asset and Claim line for a particular Claim Header. You group the results by Asset Type, Dispatch ID, Entered Date or Road or Location.

Reports similar to the Claim Details report are available elsewhere. You run this report from the **Claim Maintenance** screen to limit the results to data from a particular Claim Header.

You follow the menu path Reports > Claim Details to open the **Claim Details Report** selection criteria screen.

Claim Details Report

This report shows the details of the dispatch, asset, and claim lines for the selected claim "September 2007".

Report Options

☐ Start each dispatch on a new page

Sort dispatches by: **Asset Type / ID**

Preview Print Close

You can set each Dispatch to start on a new page

You can sort the Dispatches by Asset Type, Dispatch ID, Date Entered or Road

Start Each Dispatch on a New Page

You select the Start each dispatch on a new page check box if you want the report to print each Dispatch on a separate page.

This grid shows one row for each Dispatch within the current claim period. The Total column is the total value of claim lines for each dispatch but only those claim lines in the current claim period.

Layout

- ☐ Contract ID
- ☒ Dispatch ID
- ☐ Asset
- ☐ Status
- ☐ Call Type
- ☐ Location
- ☐ Priority
- ☒ Fault
- ☐ Dimensions
- ☐ Item Type
- ☐ Dispatch Groups
- ☐ Programming
- ☐ Email Dates

Entered	Dispatch ID	Asset Type	Call Type	Road ID	House No.	Feature
09/07/2007 13:03	8	Roadway	Contractor Engineer	BATTY RD		
09/07/2007 13:29	13	Roadway	Staff	CRONIN RD		
09/07/2007 13:37	14	Drainage(Culverts)	Staff	PATUMAHOE RD	310	Opposite 310
09/07/2007 13:39	15	Roadway	Staff	KINGSEAT RD	99	
18/07/2007 10:50	32	Roadway		ADAMS RD	3	
30/07/2007 10:08	42	Roadway		AITKEN RD	1	
21/08/2007 13:49	2413	Roadway	Network Engineer	AITKEN RD	12	
20/09/2007 10:06	2419	Roadway	Staff	ADAMS RD		

You use the Layout panel to select the columns to appear in the report

You manipulate the Grid in the normal fashion

You then press the Export button to begin the data export process

Claim Grid – Claim Lines Report

The **Claim Grid (Claim Lines)** report is a highly configurable report for listing and grouping Claim line data for export in a number of formats for use outside **RAMM Contractor**. Each line of data in the report is for one Claim line.

Configure and Export Claim Line Data

From the **Claim Maintenance** screen you follow the menu path Reports > Claim Grids > Claim Lines to open the **Claim Grid (Claim Lines)** report which is in a Grid.

This grid shows one row for each claim line within the current claim period. Where there are multiple claim lines for one dispatch, information about that dispatch will be duplicated against each claim line.

Layout

- ☐ Status
- ☐ External IDs
- ☐ Contract ID
- ☒ Dispatch ID
- ☐ Asset
- ☐ Call Type
- ☐ Location
- ☐ Priority
- ☒ Fault
- ☐ Dimensions
- ☐ Item Type
- ☐ Dispatch Groups
- ☐ Programming

Entered	Dispatch ID	Asset Type	Call Type	Road ID	House No.	Feature
09/07/2007 13:03	8	Roadway	Contractor Engineer	BATTY RD		
09/07/2007 13:29	13	Roadway	Staff	CRONIN RD		
09/07/2007 13:37	14	Drainage(Culverts)	Staff	PATUMAHOE RD	310	Opposite 310
09/07/2007 13:39	15	Roadway	Staff	KINGSEAT RD	99	
18/07/2007 10:50	32	Roadway		ADAMS RD	3	
30/07/2007 10:08	42	Roadway		AITKEN RD	1	
21/08/2007 13:49	2413	Roadway	Network Engineer	AITKEN RD	12	
20/09/2007 10:06	2419	Roadway	Staff	ADAMS RD		

You use the Layout panel to select the columns to appear in the report

You manipulate the Grid in the normal fashion

You then press the Export button to begin the data export process

Special Purpose Reports

Special Purpose reports in **RAMM Contractor** are those which are specific to one customer. So whilst they are available they represent a solution which may suit only the one customer for whom they were scripted. Use these reports with care.

From the **Claim Maintenance** screen you can run:

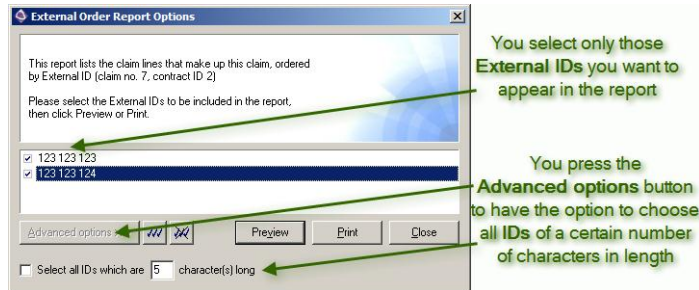
- **External Order**
The External Order report lists the Claim lines associated with a particular Claim Header ordered by External ID. You select the External IDs for which you want to run the report. See External Order Report (on page 463).
- **Subcontractor**
The Subcontractor Claim report is a highly configurable report for exporting Claim line data suitable for use by a Subcontractor as it excludes Estimate line and Claim line dollar values. You can use it to list and group other Claim line data in a number of formats for use outside **RAMM Contractor**. Each line of Data in the report is for one Claim line. See Subcontractor Report (on page 464).
- **Item Totals**
This Special Purpose report shows total quantities and amounts for a selected Claim Header against CSIs (Contract Schedule Items). You can use it to list and group Claim line data in a number of formats for use outside **RAMM Contractor**. You can analyse the data by Claim Owner and Account code if required. See Item Totals Report (on page 464).
- **State Highway Claims Report**
The State Highway Claim report is a special purpose report and as such may not have application for all **RAMM Contractor** users. It groups and lists Claim line information and in particular SH (State Highway), RS (Reference Station) and RP (Route Position) for export to the New Zealand Transport Agency (NZTA). See State Highway Claim Report (on page 466).

External Order Report

The External Order report lists the Claim lines associated with a particular Claim Header ordered by External ID. You select the External IDs for which you want to run the report.

External Order Report Options

From the **Claim Maintenance** screen you follow the menu path Reports > Special Purpose > External Order to open the **External Order Report Options** screen. You then choose the External IDs for which you want to run the report.

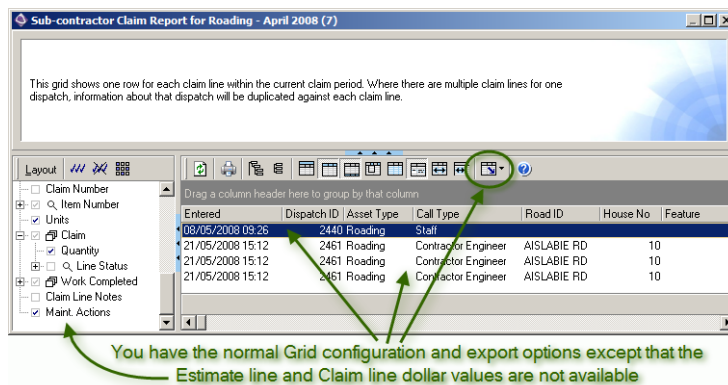


Subcontractor Report

The Subcontractor Claim report is a highly configurable report for exporting Claim line data suitable for use by a Subcontractor as it excludes Estimate line and Claim line dollar values. You can use it to list and group other Claim line data in a number of formats for use outside **RAMM Contractor**. Each line of Data in the report is for one Claim line.

Configure and Export Claim Line Data

From the **Claim Maintenance** screen you follow the menu path Reports > > Special Purpose > Sub-contractors to open the **Sub-contractor Claim Report** Asset type selection screen. You select the Asset Type and press OK to open the **Sub-contractor Claim Report** for the Asset Type. The report is in a Grid.

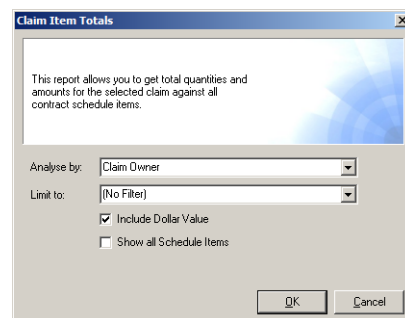


Item Totals Report

This Special Purpose report shows total quantities and amounts for a selected Claim Header against CSIs (Contract Schedule Items). You can use it to list and group Claim line data in a number of formats for use outside **RAMM Contractor**. You can analyse the data by Claim Owner and Account code if required.

Claim Item Totals

From the **Claim Maintenance** screen you follow the menu path Reports > > Special Purpose > Item Totals to open the **Claim Item Totals** selection screen.



The **Claim Item Totals** selection screen contains the following fields and options:

- Analyse by:** A drop-down menu currently set to 'Claim Owner'.
- Limit to:** A drop-down menu currently set to '(No Filter)'.
- ☒ **Include Dollar Value**
- ☐ **Show all Schedule Items**
- OK** and **Cancel** buttons at the bottom.

You select whether to analyse the report data by:

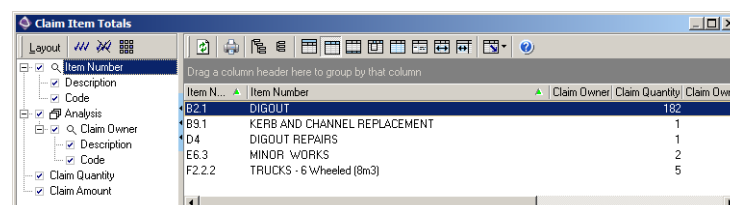
- nothing
- Claim Owner
- GL Account 1 (the account of the Network Owner)
- GL Account 2 (the account of the Contractor).

If you use Account codes, their descriptions will appear in the Analyse by drop-down list instead of GL Account 1 and GL Account 2.

The Limit to drop-down list will have values from which to choose only if there are Claim lines with associated Account codes.

You also have the option to Include Dollar Value and to Show all Schedule Items. If you only want the quantities included in the report you would clear the Include Dollar Value check box. If you want to limit the list of CSIs to only those associated with Claim lines in the Claim Header you would clear the Show all Schedule Items check box.

You make your selections and then press OK to open the **Claim Item Totals** report which is in a Grid.



The **Claim Item Totals** report is displayed in a grid. The left pane shows a tree view of the report structure with the following items checked:

- Item Number
- Description
- Code
- Analysis
- Claim Owner
- Description
- Code
- Claim Quantity
- Claim Amount

The main grid displays the following data:

Item N...	Item Number	Claim Owner	Claim Quantity	Claim Owne
B2.1	DIGOUT		182	
B3.1	KERB AND CHANNEL REPLACEMENT		1	
D4	DIGOUT REPAIRS		1	
E6.3	MINOR WORKS		2	
F2.2.2	TRUCKS - 6 Wheeled (8m3)		5	

State Highway Claim Report

The State Highway Claim report is a special purpose report and as such may not have application for all **RAMM Contractor** users. It groups and lists Claim line information and in particular SH (State Highway), RS (Reference Station) and RP (Route Position) for export to the New Zealand Transport Agency (NZTA).

From the **Claim Maintenance** screen you follow the menu path Reports > Special Purpose > State Highway Claim Report to open the **State Highway Claim Report** which is in a Grid.

State Highway Claim Report - September 2007 (4)

Drag a column header here to group by that column

taskno	sh	rs	rp	Side	direction	sched_item	quantity	rate	c
13.3362	003	0414	0000	Centre	INCR	B2.1	1	25	
14.3363	003	0564	0064	Right	INCR	B9.1	1	75	
15.3364	003	0324	0018	Left	INCR	D4	1	30	
2413.3441	003	1145	0124	Centre	INCR	F2.2.2	5	70	
2419.3464	003	0065	6250	Right	INCR	B2.1	180	25	
32.17	003	0425	9875	Left	INCR	E6.3	1	50	
42.3321	003	0433	2354	Centre	INCR	E6.3	1	500	
8.3357				Right	INCR	B2.1	1	25	

You use the Layout panel to select the Columns to appear in the report

State Highway

Reference Station

Route Position

Analysis Codes Detail Report

The Analysis Codes Detail report lists all items in a particular Analysis Code Group. It lists all Dispatches that contain a Claim line with each particular item for a Claim Header.

You run this report from the **Claim Maintenance** screen to limit the results to data from a particular Claim Header.

You follow the menu path Reports > Analysis Codes Detail to open the **Claim Group Detail Report** selection screen.

Claim Group Detail Report

This report lists all items in a particular analysis code group, and lists all dispatches that contain a claim line with each particular item, for the following claim:

Acme General Maintenance, Claim no: 7, for period from 23/04/2008 to 26/04/2008

Analyse By: Claim Owner

Preview Print Close

You select Claim Owner, GL Account 1 or GL Account 2 by which to analyse the resulting data. In the graphic below, most Claim lines have not been associated with a Claim Owner and so are in the None Specified group.

Hill Valley District Council User: Grant Macdonald Page: 1 of 1
Printed: Thursday, 22 May 2008 10:11

Analysis Codes Detail Report: Claim Owner
Acme General Maintenance
Claim No: 7 for period 23/04/2008 to 25/04/2008

(None Specified)

Dispatch	External ID	Staff	Road	Claim Date	Qty	Units	Rate	Amount	Staff
2400	123 123 124								
A1			INSPECTIONS (Cyclic) (Minimum Rate = \$2000 20-09-2008)		1	each	x \$2,500.00 =	\$2,500.00	
A2			PROGRAMMING (Cyclic) (Minimum Rate = \$2000 20-09-2008)		1	month	x \$2,500.00 =	\$2,500.00	
A3			REPORTS (Cyclic) (Minimum Rate = \$2000 20-09-2008)		1	month	x \$2,500.00 =	\$2,500.00	
A4			QUALITY ASSURANCE (Cyclic) (Minimum Rate 20-09-2008)		1	month	x \$2,500.00 =	\$2,500.00	
A5			CONTRACT MEETINGS (Cyclic) (Minimum Rate 20-09-2008)		1	month	x \$800.00 =	\$800.00	
A6			RAMM UPDATES (Cyclic) (Minimum Rate = \$800 20-09-2008)		1	month	x \$800.00 =	\$800.00	
A7			ENQUIRIES (Cyclic) (Minimum Rate = \$1000 00-10-08-2008)		1	month	x \$1,000.00 =	\$1,000.00	
A8			HEALTH & SAFETY (Cyclic) (Minimum Rate = \$ 20-09-2008)		1	month	x \$1,000.00 =	\$1,000.00	
A9			TEMPORARY TRAFFIC MANAGEMENT (Cyclic) (Minimum Rate = \$2000 20-09-2008)		1	month	x \$2,500.00 =	\$2,500.00	
B1			SEALED ROADS POTHOLES (Cyclic) (Minimum 20-09-2008)		1	km.m	x \$6.00 =	\$6.00	
C1			CHANNELS DRAINAGE (Cyclic) (Minimum Rate = 20-09-2008)		1	km.m	x \$18.00 =	\$18.00	
C2			CATCHPIT GRATING (Cyclic) (Minimum Rate = 20-09-2008)		1	km.m	x \$13.75 =	\$13.75	
D1			MAINTENANCE GRADING (Cyclic) (Minimum Rate = 20-09-2008)		1	km.m	x \$15.00 =	\$15.00	
D2			UNSEALED ROADS - POTHOLES (Cyclic) (Mini 20-09-2008)		1	km.m	x \$7.00 =	\$7.00	
B3.1			ROUTINE MAINTENANCE (Cyclic) (Minimum 20-09-2008)		1	km.m	x \$3.00 =	\$3.00	
B4.1			ROUTINE BRIDGE MAINTENANCE (Cyclic) (Mini 20-09-2008)		1	Bridge	x \$17.00 =	\$17.00	
B5.1			EMERGENCY CALLOUT SERVICE (Cyclic) (Mini 20-09-2008)		1	month	x \$15,000.00 =	\$15,000.00	
								\$17,079.75	
2401	123 123 123								
B3			STABILISATION (2% Lime / 2% Cement / 30m)		10	m2	x \$13.50 =	\$135.00	
B4.2			RIP AND REPAVE	21/05/2008	10	m2	x \$15.50 =	\$155.00	Grant Macdonald
B5.3			UNION WORK		200	hrs	x \$1.00 =	\$200.00	
								\$450.00	
								Total: \$ 17539.75	
Local Authority									
2440	123 123 123								
B3.1			STABILISATION (1.5% Lime / 1.5% Cement)	08/08/2008	1	m2	x \$11.50 =	\$11.50	
								Total: \$ 11.50	
Summary									
			(None Specified)					\$ 17539.75	
			Local Authority					\$ 11.50	
			Grand Total:					\$ 17551.25	



You simultaneously run the Generate Analysis Codes report when running the Claim report. This report is similar to the Analysis Codes Detail report except that it is a summary report. It shows only the totals not the details which make up the totals.

See Claim Report (on page 458).

Cash Flow Forecast Report

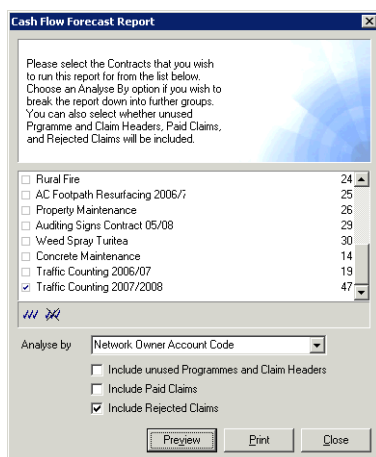
Use this report to help forecast expected cash flow from Contracts.

It assesses all Claim lines which are associated with Claim Headers which do not have a status of **Complete**. These could have a status of **Open**, **Preparing** or **Presented**. It also assesses Estimates which have not been Claimed for.

This data is then analysed to identify the Claim lines are already **Accepted** for payment, meet the **Accepted** Estimates or are **Held**. It produces a summary of those Claims which are confirmed, most likely, likely and less likely to be paid.

From this you can use your own judgement to calculate your expected cash flow.

You follow the menu path **Reporting > Contract Management > Cash Flow Forecast** to open an **Information** screen. You should read the overview of the report. When you close this screen the **Cash Flow Forecast Report** Contract selection screen will open.



Cash Flow Forecast Report

Please select the Contracts that you wish to run this report for from the list below. Choose an Analyse By option if you wish to break the report down into further groups. You can also select whether unused Programme and Claim Headers, Paid Claims, and Rejected Claims will be included.

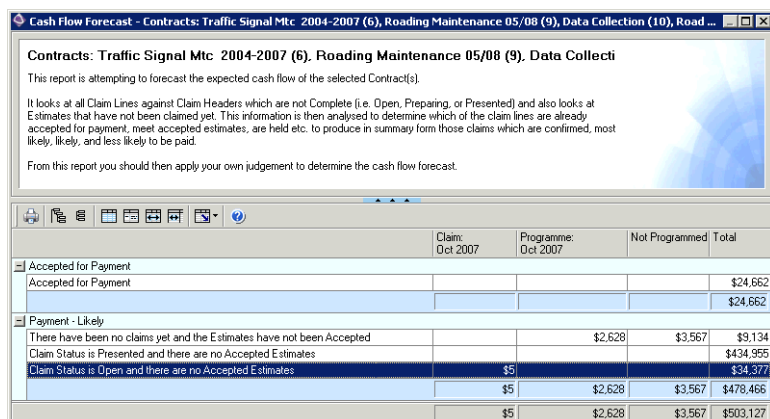
<input type="checkbox"/> Rural Fire	24
<input type="checkbox"/> AC Footpath Resurfacing 2006/7	25
<input type="checkbox"/> Property Maintenance	26
<input type="checkbox"/> Auditing Signs Contract 05/08	29
<input type="checkbox"/> Weed Spray Turflea	30
<input type="checkbox"/> Concrete Maintenance	14
<input type="checkbox"/> Traffic Counting 2006/07	19
<input checked="" type="checkbox"/> Traffic Counting 2007/2008	47

Analyse by: Network Owner Account Code

☐ Include unused Programmes and Claim Headers
☐ Include Paid Claims
☒ Include Rejected Claims

Preview Print Close

When you have selected the Contract(s) you then have other analysis options to assist you in your forecasting. You press **Preview** to show the report. You then use your own analytical skills to interpret the data shown in the report.



Contracts: Traffic Signal Mtc 2004-2007 (6), Roading Maintenance 05/08 (9), Data Collecti

This report is attempting to forecast the expected cash flow of the selected Contract(s).

It looks at all Claim Lines against Claim Headers which are not Complete (i.e. Open, Preparing, or Presented) and also looks at Estimates that have not been claimed yet. This information is then analysed to determine which of the claim lines are already accepted for payment, meet accepted estimates, are held etc. to produce in summary form those claims which are confirmed, most likely, likely, and less likely to be paid.

From this report you should then apply your own judgement to determine the cash flow forecast.

	Claim: Oct 2007	Programme: Oct 2007	Not Programmed	Total
Accepted for Payment				
Accepted for Payment				\$24,662
				\$24,662
Payment - Likely				
There have been no claims yet and the Estimates have not been Accepted		\$2,628	\$3,567	\$9,134
Claim Status is Presented and there are no Accepted Estimates				\$434,955
Claim Status is Open and there are no Accepted Estimates	\$5			\$34,377
	\$5	\$2,628	\$3,567	\$478,466
	\$5	\$2,628	\$3,567	\$503,127



This report is also available at the **Reports > Cash Flow Forecast** menu path at the **Claim Maintenance**. You then do not have to choose a Contract for which to run the report as you chose it when you opened the **Claim Maintenance** screen.

Cost Escalation and CSI Rates Report

When you apply Cost Escalation, a percentage increase or decrease is applied to CSI rates associated with the **Cost Escalation Category** for which an escalation percentage has been defined.

You view the history of the CSI Rate changes determined by Cost Escalation at the **Cost Escalation CSI Rates** report.

Cost Escalation	Start D	Item	Cost Escalation	Last Rate	New Rate	Item Number	Cost Escalation Category
19	1/05/2011	P1.1	19	\$100.0000	\$103.0000	Pothole	Hotmix
19	1/05/2011	B3.2	20	\$250.0000	\$257.5000	Sealed P/H Repair pre	Hotmix
19	1/05/2011	B1.1	21	\$41.8000	\$43.4720	Grading 282 km (p/m)	Aggregate
19	1/05/2011	B2.2	22	\$39.0000	\$40.5600	Unsealed P/H Aggreg.	Aggregate
19	1/05/2011	B4.1	23	\$28.0000	\$29.1200	In-situ stabilising (150	Aggregate
19	1/05/2011	B7.1	24	\$33.0000	\$34.3200	Aggregate EW.M40	Aggregate
19	1/05/2011	B7.2	25	\$33.0000	\$34.3200	Aggregate EW.M65	Aggregate
19	1/05/2011	B3.1	26	\$20.0000	\$21.0000	Sealed P/H Repair (20	Material Other
28	1/06/2011	P1.1	52	\$109.2315	\$114.6931	Pothole	Hotmix
28	1/06/2011	B3.2	53	\$273.0788	\$286.7327	Sealed P/H Repair pre	Hotmix
32	1/07/2011	P1.1	72	\$114.6931	\$126.1624	Pothole	Hotmix
32	1/07/2011	B3.2	73	\$286.7327	\$315.4060	Sealed P/H Repair pre	Hotmix

Cost Escalation Number

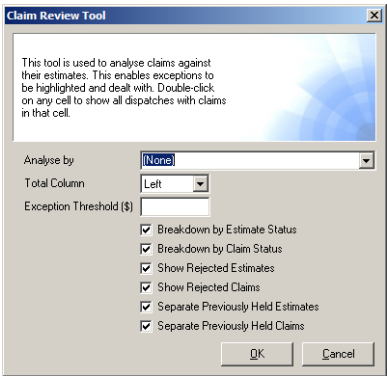
RAMM Contractor attaches an ID to each Cost Escalation run. This is per database, not per Contract. So when you view the report, there may be missing Cost Escalation IDs. For instance, in the above graphic only Cost Escalation runs 19, 28 and 32 display.

Cost Escalation applications which were subsequently reversed do not display either. This is because the CSI rates were never applied in a **Presented Claim**.

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.

You must read the *RAMM Contractor Best Practice* guide to understand how best to use the Claim Review Tool to maximise efficiency in Programmed Maintenance Contract management.



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Introduction to the Claim Review Tool.....	472
Contractor Claim Lines Review	474
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Introduction to the 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 Review Tool										
Contract: Acme General Maintenance										
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		Estimates (Matching)				Estimates (Not Matching)				
		Total	No Estimates	Open	Presented	Accepted	Claimed Value	Open	Presented	Accepted
							Estimated Value			
							Over/Under Estimate			
Open Claims	1	\$100,991	2 \$6,267	3 \$2,971	4 \$295	5 \$87,884	Claimed Value		\$620	\$2,955
							Estimated Value		\$310	\$2,265
							Over/Under Estimate		\$310	\$691
Presented		\$105	\$30		\$50	\$26	Claimed Value			
							Estimated Value			
							Over/Under Estimate			
Accepted		\$25	\$25				Claimed Value			
							Estimated Value			
							Over/Under Estimate			
Total Claims	9	\$101,121	\$6,321	\$2,971	\$345	\$87,909	Claimed Value		\$620	\$2,955
							Estimated Value		\$310	\$2,265
							Over/Under Estimate	10	\$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. You can also do this at the **Dispatch** maintenance screen in **RAMM Contractor**.

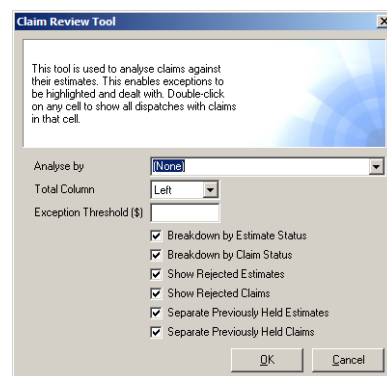
Menu Path

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 . 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

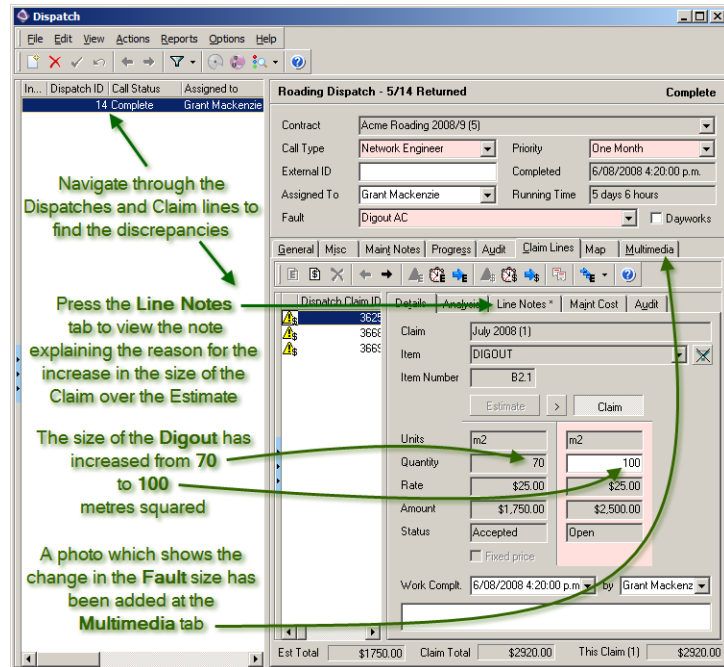
Contract: Acme Roothing 2008/9, Claim: July 2008

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	Accepted
Open Claims	\$16,497.40	\$5,492.50		\$120.00	\$8,210.00	Claimed Value	\$174.90		\$2,500.00
						Estimated Value	\$145.75		\$1,750.00
						Over/Under Estimate	\$29.15		\$750.00
Total Claims	\$16,497.40	\$5,492.50		\$120.00	\$8,210.00	Claimed Value	\$174.90		\$2,500.00
						Estimated Value	\$145.75		\$1,750.00
						Over/Under Estimate	\$29.15		\$750.00

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

- 5 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.



- 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)			E:
Open	Presented	Accepted	Claimed Value
			Estimated Value
			Over/Under Estimate
\$145.75	\$120.00	\$500.00	

Present all Claims...

- 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.

Reporting

The standard reports available from within **RAMM Contractor** are some of the most important tools within the application.

You use these reports mainly for Contract Management and Audit purposes.

Audit Report for Dispatches
Traffic Counting 2007/2008
 Dispatches from 1/04/2007 to 31/03/2008 with 2 or more Claims

Dispatch	Call Entered	Location	Contact / Phone
47/5	01/08/2007 13:40	Centre	
Response: Immediate			
Asset Type: Traffic Count Sites			
Fault: Lump Sum			
Notes: Lump Sum dispatch for claim August 2007 (1)			
Call Type: Staff (Contractor) R (Routine)			

Item	Work Completed Units	Qty.	Rate	(\$ Est Amount)	(\$ Claim Amount)	Variation	(\$ Status)
1.2 Hardware Charge	1/08/2007 each	1x	54.60 =		54.60		Presented
1.3 Routine Maintenance	1/08/2007 each	1x	377.13 =		377.13		Presented
1.1 Administration	1/08/2007 each	1x	100.00 =		100.00		Presented
Subtotal					531.73		531.73

Itemised Claim lines **Date range** **Number of Claim lines**

In This Chapter

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Contract Management Reports.....	486
Road Names Report.....	493
Roads Travelled Report.....	494
Open Preview File.....	496

Introduction to RAMM Contractor Reports

There are many reports available from [RAMM Contractor](#).

Signs, Street Lights and Traffic Signals Reports

The reports relating to Signs, Street Lights and Traffic Signals are detailed in their respective manuals. See the Reports section of the *Traffic Signals* guide.

Dispatch Reports

The Dispatch reports are found in the Dispatches chapter of this guide.

See Dispatch Reports (on page 354).

Claim Reports

The reports relating to Claims are found in the Claims chapter of this guide.

See Claim Header Reports (on page 455).

Audit Reports

The Audit reports are available from the Reporting > Auditing menu path.

See Audit Reports (on page 481).

Contract Management Reports

The Contract Management reports are available from the Reporting > Contract Management menu path.

See Contract Management Reports (on page 486).

Road Names Report

You view details about the Roads in your Network in the Road Names report.

See Road Names Report (on page 493).

View Saved Reports

You can view saved reports by following the menu path Reporting > Open Preview File.

See Open Preview File (on page 496).

Audit Reports

You use the Audit reports to gain information about your **RAMM Contractor** records.

Asset Audit

This report is used for Signs, Street Lights and Traffic Signals.

See Asset Audit (on page 481).

Multiple Claims per Dispatch

You run this report to check on Dispatches which may have an erroneous or excessive number of Claim lines.

See Multiple Claims per Dispatch (on page 481).

Table Statistics

This report is used to show where there has been a change in the number of data rows in one or more tables over a period of time.

See Table Statistics (on page 483).

Contract Audit

You run the Contract Audit report when you require audit information from a Contract.

See Contract Audit (on page 485).

Asset Audit

For details of this report for your Asset Type see the relevant guide for Signs, Street Lights and Traffic Signals.

Multiple Claims per Dispatch

You run this report to check on Dispatches which may have an erroneous or excessive number of Claim lines. It is the opposite of the Dispatch - Completed with no claim lines report which is available from the **Dispatch** screen menu path.

Selection Criteria

Dispatches will be checked on the number of claims that have been placed against one dispatch. The result of this report will identify any dispatch with more than the given number of claims against it.

Selection Criteria

Contract: Traffic Signal Mtc. 2004-2007

Claim Owner: Local Authority

From: 1/04/2007 To: 31/03/2008

Minimum Claims: 2

Order By

☐ Suburb ☐ Date Entered ☐ Fault Type ☒ Response Time

Preview Print Close

You must select a Contract before you can run the report. The report is run on a per Contract basis, not per database.

You can also run the report for a particular Claim Owner if the Contract allows for more than one.

You define the date range for the report.

Order

You have the option to order the report contents by:

- Suburb
- Date Entered
- Fault Type
- Response Time.

CJN Technologies Limited
Hill Valley Regional Council

User: Grant Mackenzie Page: 1
Printed: Tuesday, 15 April 2008 15:12

Audit Report for Dispatches

Traffic Counting 2007/2008

Dispatches from 1/04/2007 to 31/03/2008 with 2 or more Claims

Dispatch	Call Entered	Location	Contact / Phone
47/5	01/08/2007 13:40	Centre	
	Response: Immediate		
	Asset Type: Traffic Count Sites		
	Fault: Lump Sum		
	Notes: Lump Sum dispatch for claim August 2007 (1)		
			Call Type: Staff (Contractor) R (Routine)

Item	Work Completed Units	Qty.	Rate	(\$ Est Amount	(\$ Claim Amount	(\$ Variation	Status
1.2 Hardware Charge	1/08/2007 each	1 x	54.60 =		54.60	54.60	Presented
1.3 Routine Maintenance	1/08/2007 each	1 x	377.13 =		377.13	377.13	Presented
1.1 Administration	1/08/2007 each	1 x	100.00 =		100.00	100.00	Presented
					531.73	531.73	

Itemised Claim lines Date range Number of Claim lines

Table Statistics

This report is used to show where there has been a change in the number of data rows in one or more tables over a period of time. You use it to see where all the growth has been and perhaps more interesting, where there has been a reduction in the number of rows.

Table Statistics Table

This report is available in **RAMM Manager** and is more usually run from there. The table statistics data is collected each month automatically.

When the report does not check the actual tables. It checks the data which collected in the Table Statistics table. This is much quicker. This is also the reason why only certain dates are available from the fields in the Report Date Range section. The report is only looking at data in the Table Statistics table which was collected on those dates.

Table Options

You have the option to report on:

- All tables
- Main tables only
- Lookup tables only
- individual **RAMM** tables.

If you report on multiple tables, you can refine your report using the options below. If you report on a single table only, there are no further options.

Report Date Range

You limit the report to a date range of your choosing from the drop-down lists in the Report Date Range section. The actual dates are limited to those on which the table statistics were collected and added to the Table Statistics table.

Added On and Changed On Dates

Whenever data is added or changed in a **RAMM** table, an Added On or Changed On date record is kept. You use these options when you want to find data from only those **RAMM** tables which have had additions or changes which have occurred after a certain date.

You have two options to refine the report using these dates. They are:

- **Max Added On Not Earlier Than**
the most recent data was added on a date later than the date which you choose from the drop-down calendar.
- **Max Changed Not Earlier Than**
the most recent data was changed on a date later than the date which you choose from the drop-down calendar.

Table Size Change Analysis

You can see in the graphic above, the simple options for reporting based on the table size changes. The lower options in the section are available only if the Only Changed Tables option is selected.

Sorting and Ordering

You can sort the report results alphabetically or by the quantum of the change in table size.

You can order the results in ascending or descending order.

CIN Technologies Limited
Hill Valley Regional Council

User: Grant Mackenzie
Printed: Tuesday, 15 April 2008 15:48

Page: 1

RAMM Table Statistics Report

All tables that have increased by 20% or more.
User selected date range: From 27/10/1999 to 04/04/2008
Actual date range: From 27/10/1999 to 04/04/2008

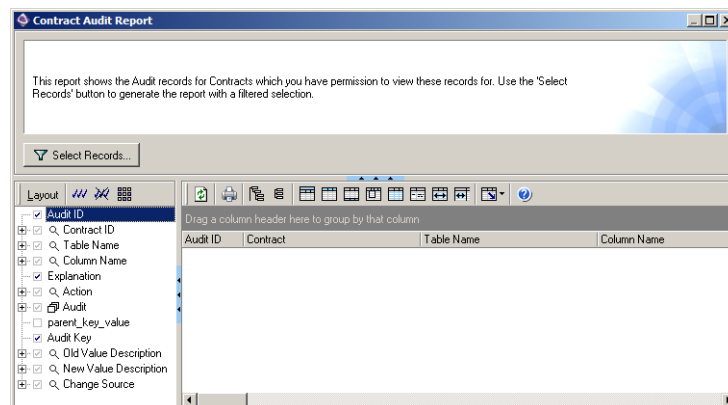
Table Name	Old Row Count	New Row Count	Percent Change	Maximum Asset ID	Maximum Added On	Maximum Changed On	Table Description
↑ hsd_rough	0	169615	new	295244			Roughness readings - from Laser Profilometer
↑ hsd_rutting	0	129858	new	210219			Rutting readings - from laser profilometer
↑ hsd_texture	0	120604	new	200965			Texture readings - from laser profilometer
↑ rough	83423	189976	127.7	195920			Roughness Table - Roughness of pavement surface
↑ hsd_geometry	0	83482	new	83811			Geometry readings - from Laser Profilometer
↑ mt_dispatch	2	28997	144975		01/02/2006	01/02/2006	Reception log for all maintenance calls and Dispatch records
↑ treatment	838	28084	3251.3	141280			The Final Treatment Option and Costs from T/S

Contract Audit

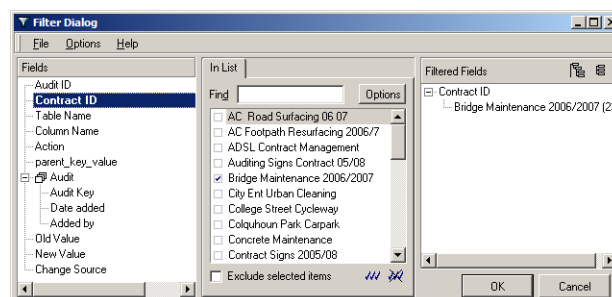
Audit records are sequential dated information lines which detail changes to Dispatches, Claim lines, Estimate lines, Claim Headers and to the Contract itself. They become an Audit trail. You use this to find out who took certain actions and when they occurred. You decide which Audit records to keep when you are setting up a Contract. Audit records can not be created retroactively.

You run the Contract Audit report when you require audit information from a Contract.

You can select one or more Contracts on which to report. You can also filter the report to include only the Audit information you require. You follow the menu path Reporting > Audit Reports > Contract Audit Reports.



You press the **Select Records** button to open a **Filter Dialog** screen. From there you have a variety of choices. The main choice is the Contract ID.



Contract Management Reports

You use the Contract Management reports to assist in the running of the Contract.

Dispatch Analysis

The Dispatch Analysis report is a Decision Cube which you can use to manipulate Dispatch data for reporting purposes. It generates an analysis of Dispatches by Call Status and Call Type by default but you can reconfigure this.

See Dispatch Analysis (on page 487).

Dispatch Movement

You run the Dispatch Movement report to view Dispatch movements for a particular period. The default is Dispatch movements for the previous month.

See Dispatch Movement (on page 487).

Fault Summary

You run this report to display a summary of Faults which have lead to the creation of Dispatches during a defined date range.

See Fault Summary (on page 488).

Job Sheets

You run the Job Sheet report to print a Dispatch report or Job Sheets. This has most relevance for users who use a paper-based system rather than **Pocket RAMM**.

See Job Sheet (on page 489).

Claim or Estimate Analysis

The Claim/Estimate Analysis report is a Decision Cube which you can use to manipulate Claim and Estimate data for reporting purposes. It generates an analysis by Claim Year, Claim Amount and Claim Quantity by default.

See Claim/Estimate Analysis (on page 490).

Cash Flow Forecast

Use this report to help forecast expected cash flow from Contracts.

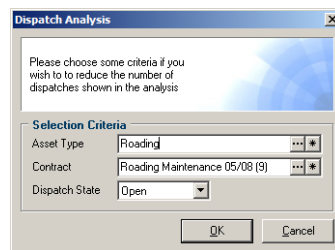
See Cash Flow Forecast Report (on page 467).

Dispatch Analysis

The Dispatch Analysis report is a Decision Cube which you can use to manipulate Dispatch data for reporting purposes. It generates an analysis of Dispatches by Call Status and Call Type by default but you can reconfigure this.

The same report is available from the **Dispatch** screen. The difference is that when it is run from this screen, only the Dispatches currently listed in the screen are available for analysis.

You follow the menu path Reporting > Contract Management > Dispatch Analysis to open the **Dispatch Analysis** selection criteria screen.



Once you have limited the results by Asset Type, Contract and Dispatch State, you press OK to open the **Dispatch Analysis** Decision Cube.

Dispatch Analysis

File Edit View Help

Call Status Contract Response Time Band Call Type Response Days Year Entered Month Entered

Call Status	Contract	Response Time Band	Call Type	Response Days	Year Entered	Month Entered
Dispatched	1.00	1.00	2.00	2.00	1.00	1.00
Started Work	1.00	1.00				
Total	2.00	2.00	2.00	2.00	1.00	1.00

For further information on Decision Cubes see the Decision Cube chapter of the *Using RAMM* guide.

Dispatch Movement

You run the Dispatch Movement report to view Dispatch movements for a particular period. The default is Dispatch movements for the previous month.

You can use it to compare the number of Dispatches outstanding at the start of the month with those outstanding at the end of the month. You can show Dispatches for one Contract only at a time.

To run the report you follow the menu path Reporting > Contract Management > Dispatch Movement. This opens the **Dispatch Movement Report** selection criteria screen.

Once you have selected the Contract and the date range you press Preview to open the report itself.

C/N Technologies Limited
Hill Valley District Council

User: Grant Mackenzie Page: 1
Printed: Wednesday, 10 April 2008 11:03:01 a.m.

Dispatch Movement Report
Traffic Counting 2006/07
Includes all dispatches for the period Tuesday: 1 August 2006 - Thursday: 31 August 2006

You can compare the number of Dispatches which were outstanding at the start of the period with the number outstanding at the end of the period

	Council staff	Other	Staff (Contractor)	Total
Outs tanding at the start	0	0	9	9
Entered this period	1	0	46	47
Entered later for this period	0	0	0	0
Entered for earlier period	0	0	0	0
Transferred this period	0	0	0	0
Completed this period	0	0	42	42
Outs tanding at the end	1	0	13	14

You can compare the number of Dispatches which were entered during the period with the number completed during the period

Fault Summary

You run this report to display a summary of Faults which have lead to the creation of Dispatches during a defined date range.

You follow the menu path Reporting > Contract Management > Fault Summary to open an Asset Type selection dialog. You then select the Asset Types for which you want to view Dispatches of the Fault type to be selected.

The **Fault Summary** Grid screen then opens. You have the options then of limiting the report to a single Contract and a single Dispatch Status.

Fault Summary

Options

Contract: Traffic Counting 2006/07
Status:
Date Range: 1/04/2005 To 31/03/2008
Intersection Owner:

Refresh

This report displays a Summary of Faults. Select the desired options on the left, and press the Generate button to display or refresh the report.

Layout

- ☒ Location
- ☒ Contract ID
- ☒ Fault
- ☒ Dispatch ID
- ☒ Asset
- ☒ Status
- ☒ Notes
- ☒ Intersection Number
- ☒ Intersection Description
- ☒ External IDs
- ☒ Item Number
- ☒ Claim
- ☒ Units

Asset Type

Road ID	Fault Desc	Dispatch ID	Call Type	Call Status	Maint N
Roadings					
BOURKE ST	BROKEN GLASS	2608	Public call	Complete	
BOURKE ST	BROKEN GLASS	2608	Public call	Complete	
JASPER PL	BROKEN GLASS	2607	Public call	Complete	
JASPER PL	BROKEN GLASS	2607	Public call	Complete	
CHURCHILL AVE	Building Mtc. Painting an	277	Routine patrol	Complete	
CHURCHILL AVE	Building Mtc. Painting an	273	Routine patrol	Complete	
RANGIORA AVE	Crack - Alligator	726	Works Staff	Entered	in front of house 1
HOBSON PL	Crack - Alligator	998	Works Staff	Complete	
NGATA ST	Crack - Alligator	948	Works Staff	Entered	in front of house 1

Job Sheet

You run the Job Sheet report to print a Dispatch report or Job Sheets. This has most relevance for users who use a paper-based system rather than **Pocket RAMM**.

Print Dispatches

This will print a Dispatch Report and/or Job Sheets which match the criteria

Dispatch

Contract: Traffic Counting 2007/2008
Date Range: 1/04/2007 to 31/03/2008
☐ Response Time > 0 days

Report Selection

Include Claim Lines: Claims and Estimates

- ☒ Include Crew Name
- ☒ Include Analysis Codes
- ☒ Include Maintenance Cost
- ☒ Include Audit Details
- ☐ Include Claim Notes
- ☐ Include Progress Notes
- ☐ Include Rejected Claim Lines/Estimates

☒ Job Sheets: One dispatch per page
☒ Include Multimedia Images
☒ Include Dispatch Map

☒ Dispatch Report: Multiple dispatches per page
☐ Include Dispatch Notes
☐ Include Dispatch Groups

☐ New Page for each Road
☐ Custom Title

Order By: Asset Type / ID

Preview Print Close Help



If you want to print out Job Sheets only it may be more efficient to do so from the **Dispatch** screen.

Job Sheets and the Master List

This report is very useful for users who print a run of Job Sheets for the crews and then a report containing a master list of all the Jobs. This master list would be used by the person who manages the field crews. You follow the menu path Reporting > Contract Management > Job Sheets to open the **Print Dispatches** screen (above).

You have a variety of options to customise the report to suit your business practices. This includes defining a date range, selecting a Contract and choosing the content to be included.

You also decide whether to print Job Sheets, the Dispatch Report or both.

CJN Technologies Limited
Hill Valley Regional Council

User: Grant Mackenzie Page: 1
Printed: Wednesday, 16 April 2008 1:15:24 p.m.

Dispatch Report

Traffic Counting 2007/2008

For Completed dispatches from 1/04/2007 to 31/03/2008 - Ordered by Fault Type

Dispatch	Call Entered	Location	Contact / Phone
1	19/07/2007	MAIN ST WEST N3, [6002] (83m), Right	
	Response: 6 days 23 hours		1 (Special)
	Asset Type: Traffic Count Sites		Call Type: Staff (Contractor)
	Fault: Traffic Count		
	Crew Name: Steven Cleverley		
Progress Notes			
	19/07/2007 8:50:00 a.m. scleverley		Status was changed to Started Work (I)
	26/07/2007 8:41:00 a.m. scleverley		Status was changed to Complete (C)
4	1/08/2007 1:25:00	68 KAIMANAWA ST, KELVIN GROVE [309] (703m), Right	
	Response: Immediate		R (Routine)
	Asset Type: Traffic Count Sites		Call Type: Council staff
	Fault: Traffic Count		
	Crew Name: Steven Cleverley		
Progress Notes			
	1/08/2007 1:27:00 p.m. scleverley		Status was changed to Complete (C)

Claim/Estimate Analysis

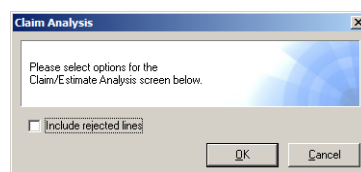
The Claim/Estimate Analysis report is a Decision Cube which you can use to manipulate Claim and Estimate data for reporting purposes. It generates an analysis by Claim Year, Claim Amount and Claim Quantity by default.


This report is available from the:

- **RAMM Contractor** main screen
when run from this screen Claim lines from a one or more selected Contracts are available
- **Claim** screen
when run from this screen, only the Claim lines associated with the highlighted Claim Header are available for analysis

- **Dispatch** maintenance screen
when run from this screen only the Claim lines associated with the particular set of Dispatches in the (unnamed) Dispatch List panel are available for analysis.

You follow the menu path Reporting > Contract Management > Claim/Estimate Analysis to open the **Claim Analysis** Contract selection screen. You select one or more Contracts and press OK to open the **Claim Analysis** selection criteria screen.



Once you have decided whether to select the Include rejected lines option you press  to open the **Claim/Estimate Analysis** Decision Cube.

Contract Item	2006		2007	
	Claim Amount	Claim Quantity	Claim Amount	Claim Quantity
(019) 2.3 35mm depth AC 14 wearing course -			\$35553.00	2031.60
(047) 1.1 Establishment, setting out and cleanup			\$1500.00	1.00
(052) 1a Excavate and prepare surface including topsoil			\$22828.50	2403.00
(062) 1.2 Inspections	\$900.00	10.00		
(069) 2.1 Mill or excavate to a depth of 35mm below fin.			\$12189.60	2031.60
(088) 1.3 Reports	\$720.00	8.00		
(114) 1.2 Traffic Control			\$1000.00	1.00
(138) 2.2 Excavate, cart to waste unsuitable material be			\$4495.00	31.00
(152) 1b Supply and spray tack coat and Grade 5 chip			\$8410.50	2403.00
(178) 3.1 Mill or excavate to a depth of 35mm below fin.			\$2362.50	315.00

For further information on Decision Cubes see the Decision Cube chapter of the *Using RAMM* guide.

Cash Flow Forecast Report

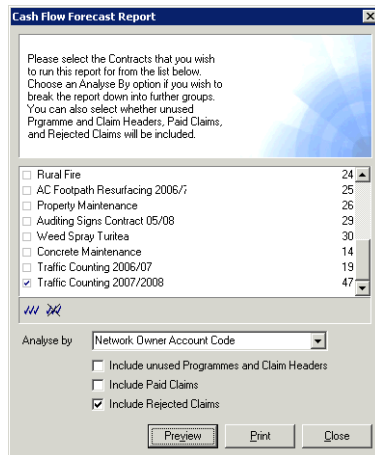
Use this report to help forecast expected cash flow from Contracts.

It assesses all Claim lines which are associated with Claim Headers which do not have a status of **Complete**. These could have a status of **Open**, **Preparing** or **Presented**. It also assesses Estimates which have not been Claimed for.

This data is then analysed to identify the Claim lines are already **Accepted** for payment, meet the **Accepted** Estimates or are **Held**. It produces a summary of those Claims which are confirmed, most likely, likely and less likely to be paid.

From this you can use your own judgement to calculate your expected cash flow.

You follow the menu path Reporting > Contract Management > Cash Flow Forecast to open an **Information** screen. You should read the overview of the report. When you close this screen the **Cash Flow Forecast Report** Contract selection screen will open.



Cash Flow Forecast Report

Please select the Contracts that you wish to run this report for from the list below. Choose an Analyse By option if you wish to break the report down into further groups. You can also select whether unused Programme and Claim Headers, Paid Claims, and Rejected Claims will be included.

<input type="checkbox"/> Rural Fire	24
<input type="checkbox"/> AC Footpath Resurfacing 2006/7	25
<input type="checkbox"/> Property Maintenance	26
<input type="checkbox"/> Auditing Signs Contract 05/08	29
<input type="checkbox"/> Weed Spray T unitka	30
<input type="checkbox"/> Concrete Maintenance	14
<input type="checkbox"/> Traffic Counting 2006/07	19
<input checked="" type="checkbox"/> Traffic Counting 2007/2008	47

Analyse by: Network Owner Account Code

☐ Include unused Programmes and Claim Headers
☐ Include Paid Claims
☒ Include Rejected Claims

Preview Print Close

When you have selected the Contract(s) you then have other analysis options to assist you in your forecasting. You press Preview to show the report. You then use your own analytical skills to interpret the data shown in the report.

Cash Flow Forecast - Contracts: Traffic Signal Mtc 2004-2007 (6), Roading Maintenance 05/08 (9), Data Collection (10), Road ...

Contracts: Traffic Signal Mtc 2004-2007 (6), Roading Maintenance 05/08 (9), Data Collecti

This report is attempting to forecast the expected cash flow of the selected Contract(s).

It looks at all Claim Lines against Claim Headers which are not Complete (i.e. Open, Preparing, or Presented) and also looks at Estimates that have not been claimed yet. This information is then analysed to determine which of the claim lines are already accepted for payment, meet accepted estimates, are held etc. to produce in summary form those claims which are confirmed, most likely, likely, and less likely to be paid.

From this report you should then apply your own judgement to determine the cash flow forecast.

	Claim: Oct 2007	Programme: Oct 2007	Not Programmed	Total
Accepted for Payment				
Accepted for Payment				\$24,662
				\$24,662
Payment - Likely				
There have been no claims yet and the Estimates have not been Accepted		\$2,628	\$3,567	\$9,134
Claim Status is Presented and there are no Accepted Estimates				\$434,955
Claim Status is Open and there are no Accepted Estimates	\$5			\$34,377
	\$5	\$2,628	\$3,567	\$478,466
	\$5	\$2,628	\$3,567	\$503,127



This report is also available at the Reports > Cash Flow Forecast menu path at the **Claim Maintenance**. You then do not have to choose a Contract for which to run the report as you chose it when you opened the **Claim Maintenance** screen.

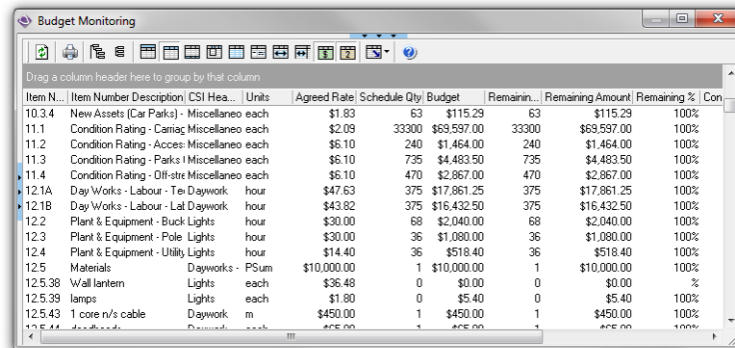
Budget Monitoring Report

The Budget Monitoring report is used to monitor performance of actual versus budget for Claims and CSIs (Contract Schedule Items) for a Contract over a financial year. Both the Contractor and the Network Owner can use this report.

The Budget Monitoring report lists Contract Schedule Items (CSIs) in ascending numerical order. For each CSI it will display the Units of Measure, the Agreed Rate, the Schedule Quantity, the Budget Amount, the Quantity Remaining, the Percentage Remaining and the Remaining Amount in dollars.

You can choose to break down the figures by Claim.

You then analyse this information. You use your own judgement to determine future actions under the Contract.

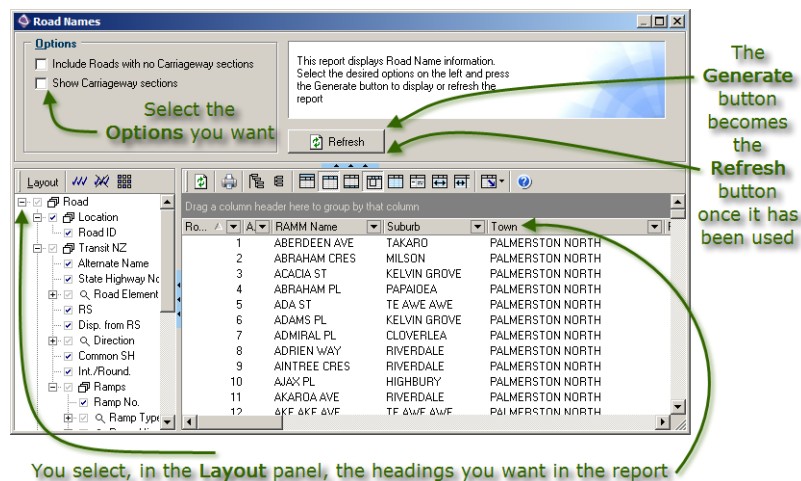


Item N...	Item Number	Description	CSI Hea...	Units	Agreed Rate	Schedule Qty	Budget	Remainin...	Remaining Amount	Remaining %	Con...
10.3.4	New Assets (Car Parks) - Miscellaneous	each		\$1.83	63	\$115.29	63	\$115.29	100%		
11.1	Condition Rating - Carriageway Miscellaneous	each		\$2.09	33300	\$69,597.00	33300	\$69,597.00	100%		
11.2	Condition Rating - Access Miscellaneous	each		\$6.10	240	\$1,464.00	240	\$1,464.00	100%		
11.3	Condition Rating - Parks Miscellaneous	each		\$6.10	735	\$4,483.50	735	\$4,483.50	100%		
11.4	Condition Rating - Off-street Miscellaneous	each		\$6.10	470	\$2,867.00	470	\$2,867.00	100%		
12.1A	Day Works - Labour - Te Daywork	hour		\$47.63	375	\$17,861.25	375	\$17,861.25	100%		
12.1B	Day Works - Labour - La Daywork	hour		\$43.82	375	\$16,432.50	375	\$16,432.50	100%		
12.2	Plant & Equipment - Buck Lights	hour		\$30.00	68	\$2,040.00	68	\$2,040.00	100%		
12.3	Plant & Equipment - Pole Lights	hour		\$30.00	36	\$1,080.00	36	\$1,080.00	100%		
12.4	Plant & Equipment - Utility Lights	hour		\$14.40	36	\$518.40	36	\$518.40	100%		
12.5	Materials	Dayworks - PSum		\$10,000.00	1	\$10,000.00	1	\$10,000.00	100%		
12.5.38	Wall lantern	Lights	each	\$36.48	0	\$0.00	0	\$0.00	%		
12.5.39	lamps	Lights	each	\$1.80	0	\$5.40	0	\$5.40	100%		
12.5.43	1 core n/s cable	Daywork	m	\$450.00	1	\$450.00	1	\$450.00	100%		
12.5.44	daywork	Daywork	each	\$05.00	1	\$05.00	1	\$05.00	100%		

Road Names Report

You use this report to display information about the Roads in your Network. The information you display will depend on the selections you make in the Layout panel and in the Options section.

Follow the menu path Reporting > Road Names to open the Road Names report.



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:

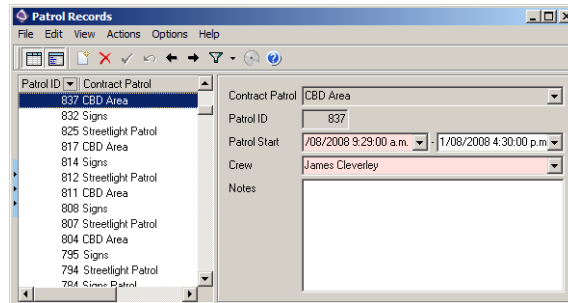
- which crew members performed the Patrol
- which Roads were covered
- how many times a Dispatch or Job has been worked on
- how long each Job has taken.

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.

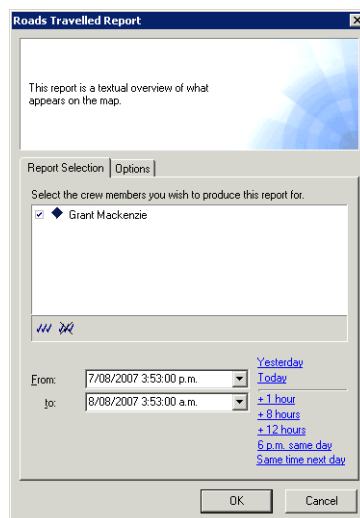
Run the Report

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.

CJM 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)	49	10 -	97 15:53 - 15:54					
MARGARET ST (388)	45	113 -	113 15:54 - 15:55					
KARINA TCE (316)	38	0 -	228 15:55 - 15:59					
UPPER MAIN ST (976)	21	195 -	195 15:59 - 16:00					
BRISTOL CRES (79)	21	81 -	81 16:00 - 16:01					
CLYDE CRES (137)	97	123 -	763 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 - 16:14	7367	Signs	req upgrade	Dispatched	Added
RANGIORA AVE (505)	1254	279 -	927 16:14 - 16:16	7368	Signs	Vandalism	Dispatched	Added
RANGIORA AVE (505)	1254	279 -	279 16:28 - 16:30	7369	Signs	broken concrete	Dispatched	Added
RUAHINE ST (532)	3794	198 -	1498 16:30 - 16:35					
MAIN EAST S (812)	3224	98 -	903 16:32 - 16:35					
RUAHINE ST (532)	3794	186 -	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

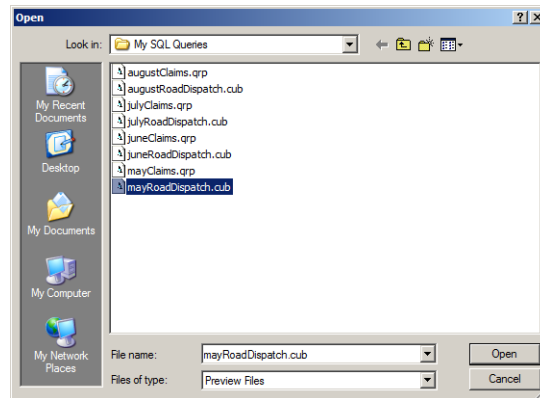
Open Preview File

A Contractor needs to have a variety of reports. This could be for their own analysis purposes or at the behest of the Network Owner.

RAMM Contractor reports may be in a variety of formats such as the .cub (Decision Cube). Another common format is the .qrp (Quick Report).

You will want to save reports in these and other formats such as Microsoft Excel Spreadsheets. You may also want to print them.

Once you have saved the reports, you can preview them at a later date by following the menu path Reporting > Open Preview File.

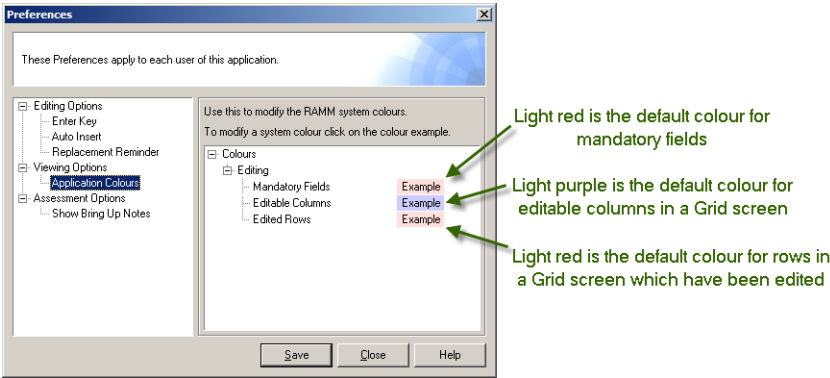


Options

You will want to set up **RAMM Contractor** to match your personal preferences

Individual user preferences are described in the RAMM Options chapter of the *Using RAMM* guide. However, there are some preference options which are particular to **RAMM Contractor**. They relate to:

- the behaviour of the **Enter** key, Auto Insert and the Replacement Reminder when you are editing
- some of the standard colours used to differentiate items and
- Bring Up Note options if you use Assessment for Traffic Signals Contracts.



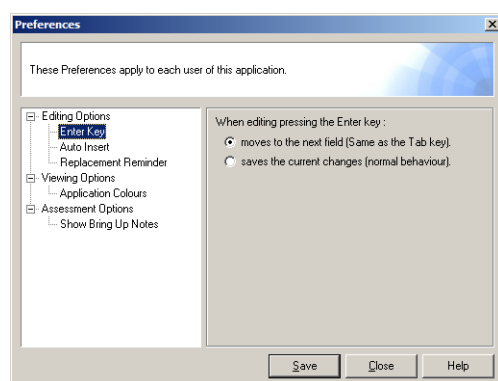
In This Chapter

Editing Options	500
Viewing Options	502
Assessment Options	504

Editing Options

You have the option to control the behaviour of the Enter key and Auto Insert and the Replacement Reminder. If you use **RAMM Contractor** for data entry, then setting up the Enter key and Auto Insert to behave in a particular fashion may save you time and make the data entry or editing process more efficient. If you have Contracts for Signs, Street Lights and Traffic Signals you will want to control the behaviour of the **Replace Asset** dialog which prompts you to replace all attached Assets in addition to the Asset itself.

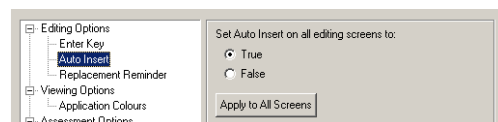
Enter Key



You set the Enter key to:

- behave like the **Tab** key when pressed and move the next field or
- follow its normal behaviour which is to save the changes you have made when pressed.


Auto Insert



Auto Insert mode is especially useful when you are entering many records at once into a screen. If you select **Set Auto Insert on all editing screens to True** and press the **Apply to All Screens** button, then when you are working in **RAMM Contractor**:

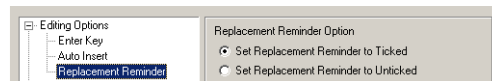
- A new record is created automatically when the screen first opens, ready for you to enter details
- Another blank, new record is created automatically when you save the current record
- The current record is saved automatically when you move to another record.

To Activate Auto Insert for One Screen

To switch on Auto Insert for the screen you are working with, go to the menu at the top of the Detail screen or Lookup maintenance screen and follow the menu path **Edit >  Auto Insert**.

This option is not always available.

Replacement Reminder

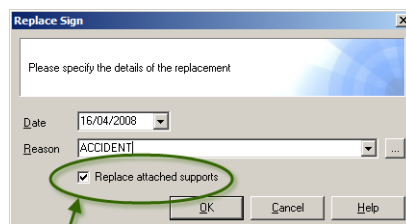


The Replacement Reminder option will activate a reminder on the **Replace Asset** dialog prompting you to replace all attached Assets in addition to the Asset itself. This option applies only to Signs, Street Lights and Traffic Signals.

An example of the effect of this option is when you have opened one of the Asset screens, in the example below, the **Signs** screen, selected an Asset, in this case a Sign, and followed the menu path **Action > Replace**, a **Replace Asset** dialog will open.

In this case it is the **Replace Sign** dialog. The replacement option will be selected by default if you have selected the Set Replacement Reminder to Ticked option.

It will be cleared by default if you have selected the other option.



This replacement option will be selected by default if you have selected the Set Replacement Reminder to Ticked option



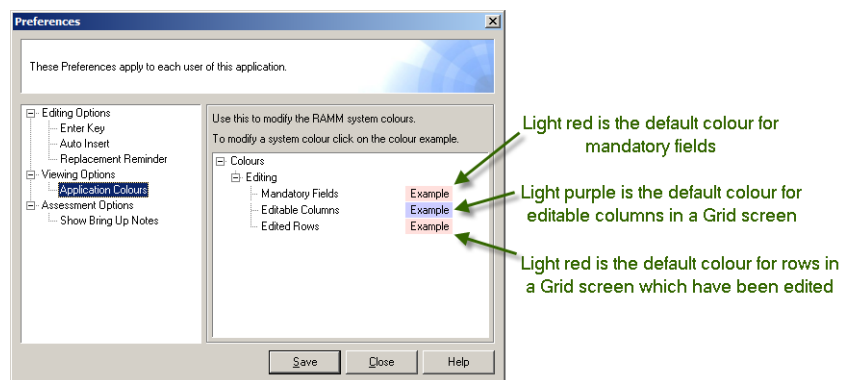
These preferences are personal to you and do not apply to other users.

NOTE

Viewing Options

RAMM Contractor has default system colours to help the user understand which fields in a Detail screen are mandatory, which columns in a Grid screen are editable and which rows of data in a Grid screen have been edited and not saved.


Application Colours



Mandatory Fields

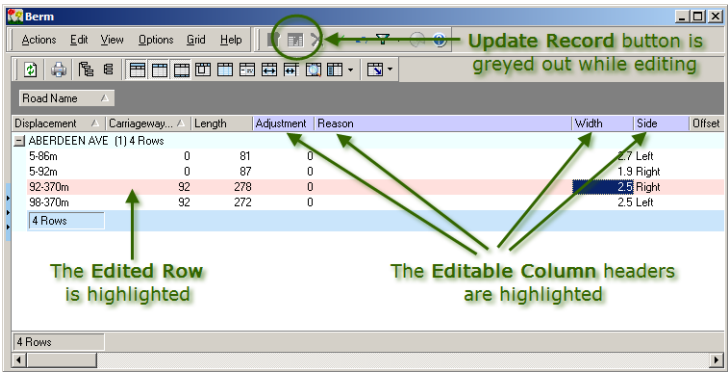
Mandatory fields are highlighted to show a user that they can not save an item they have added or edited unless that field has a valid value. The standard colour is a light red. If you are reading the .pdf or .html versions of this guide, you can see this colour shown above.

Editable Columns

When you open a Grid screen and press the **Update Record**  button, the headers of the columns which are able to be edited will become highlighted in the colour chosen for **Editable Columns**. The standard colour is light purple. If you are reading the .pdf or .html versions of this guide, you can see this colour shown above and in the graphic below. If you are reading the print version of this guide, the colours will, unfortunately, all be shades of grey.

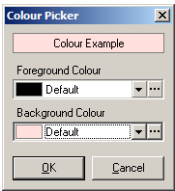
Edited Rows

When you edit a record in a Grid screen, the row for the record you are editing will become highlighted in the colour chosen for **Edited Rows**. The standard colour is a light red. If you are reading the .pdf or .html versions of this guide, you can see this colour shown above and in the graphic below. If you are reading the print version of this guide, the colours will, unfortunately, all be shades of grey.

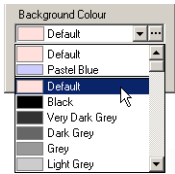


Change Colours

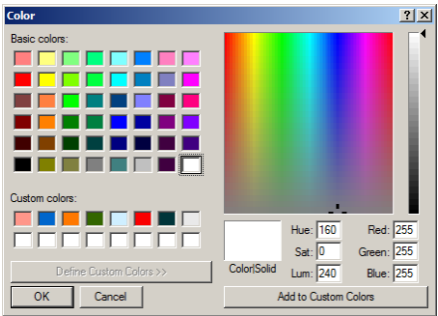
You can change the default colours of the text and the background. Double-click on the example colour you wish to change to open the **Colour Picker** screen.



You select a different text or background colour from one of the drop-down lists.



If you press the ellipsis **...** adjacent to the drop-down list you can open the **Color** screen and choose from a wider selection. If you press the Define Custom Colors button, you can define your own custom colours.

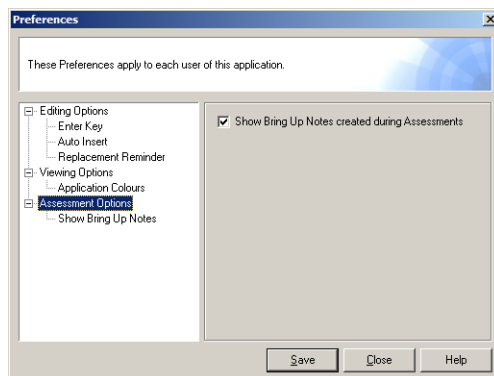


Assessment Options

When you add the results of an Assessment in **RAMM Manager** there is the option to write a note associated with the Asset. There is an option at that stage to designate the note as a **Bring Up Note**. These notes are designed to pop up when a user selects the Asset.

Not everyone is interested in these notes. So the default setting for the **Show Bring Up Notes created during Assessments** option is cleared. In this situation, even though the **Bring Up Notes** are set to pop up by the person who wrote the note associated with the Asset, they will not appear.

Select the **Show Bring Up Notes created during Assessments** option if you want these notes to appear.



Traffic Signals are the only Asset Type which uses Assessment in **RAMM Contractor**.

So you can ignore this option if you do not use both Assessment in **RAMM** and Traffic Signals in **RAMM Contractor**.

Glossary

Maintenance Activity is the measure of the actions taken to maintain the Network inventory. Network Owners use Maintenance Activity to compare the how much work was done in different years. They can also be used to compare the maintenance costs from one year to the next. You set up Maintenance Costs in **RAMM Contractor**.

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.

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).

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 Related Charge

An Asset Related Charge is an Automatic Claiming rule for Asset replacements for Signs, Street Lights and Traffic Signals. You define Asset Related Charges at the Automatic Claims tab on the **Schedule Items** screen.

Asset Related Charge Override

An Asset Related Charge Override is a mechanism to override an Asset Related Charge. This is an Automatic Claiming rule for Asset replacements for Signs, Street Lights and Traffic Signals. You use Asset Related Charge Overrides when you

need to substitute one Claim line for a number of Claim lines.

This is useful when several items can each be charged for as their own Claim line or combined into one Claim line for a group or kit set but can also be included as a component part of another CSI.

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.

Auto Claiming

This is the automation the process of generating Claim and Estimate lines when a Job or Dispatch is **Completed**. This is particularly useful for field crews using **Pocket RAMM**. Once

the work has been performed, the Job can be **Completed** and the Claim or Estimate lines generated automatically without the field crew needing to be familiar with the Claim and Estimation process.

Auto Claiming is different for Signs, Street Lights and Traffic Signals than for other Asset Types.

Budget Monitoring Report

The Budget Monitoring report is used to monitor performance of actual versus budget for Claims and CSIs (Contract Schedule Items) for a Contract over a financial year. Both the Contractor and the Network Owner can use this report.

Call Type

This is a **RAMM Contractor** item used to record the type of call made to report a Fault. This could be a call from the public, the council or a routine Patrol.

Each Dispatch must have a Call Type code to identify the source of Fault reports. This can assist with Dispatch priority. It also enables analysis of Fault reporting. Call Types are specific to each Asset Type as the range of sources of Fault reports is likely to vary by Asset Type.

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 Groups

Claim Groups are **RAMM Contractor** items used to categorise or group Claim lines. There are Contract Claim Groups and Asset Type Claim Groups.

Contract Claim Groups are used to group Claims for analysis and reporting purposes for an individual Contract. You create them only if a standard **RAMM Contractor** function to group the Claim lines does not already exist.

Asset Type Claim Groups are used to group Claim lines 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.

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.

Cost Escalation

Cost Escalation is a Contract provision to allow groups of Contract costs to be increased during the term of the Contract. The escalation is by an agreed percentage and frequency. It commences from an agreed Initiation Date. The rate of Cost Escalation may vary by item. Contract items subject to the same Cost Escalation imperatives are grouped under the same Cost Escalation Category.

Cost Escalation Category

Cost Escalation Categories are **RAMM Contractor** items used to group CSIs which are subject to the same rate of Cost Escalation during the currency of a Maintenance Contract.

Cost Group

A Cost Group is a **RAMM Contractor** item used to group linked remedial Activities and Faults. Cost Groups assist the Network Owner with Network maintenance planning. They group Maintenance Costs data in **RAMM Contractor** to be transferred to **RAMM**. Cost Groups are associated with CSIs, Fault Categories or both.

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.

Custom Security Switch

Custom is one of the settings of the Global Security Switch. When you individualise the Permissions for a

user, the Global Security Switch is automatically set to Custom.

You manage access to **RAMM Contractor** by setting Staff Permissions. You do this to limit the actions of users to those areas of **RAMM Contractor** to which they need access in order to be able to perform their normal work tasks.

Where the Global and preset Security Groups do not match the Staff Permission Set required for a particular staff member, you define an individual Security Profile for the user.

To do this you use a range of switches covering different aspects of the data and **RAMM Contractor** functions. Each of these switches, such as the one used to enable a user to maintain Claim Headers, has a hierarchical series of preset levels defined. For instance, this allows you to give a user View Only access so they can see but not touch, or to give them View and Update access. The latter case would allow a user to make changes to the Claim Headers.

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.

Dayworks

Dayworks are typically emergency works such as slip clearance or works done outside the Contract on an hourly basis.

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.

Detail Screen

Detail screens in **RAMM** are used for working with Road Inventory, Condition and other items one at a time. You use them to view and maintain details for one item only at a time.

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.

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.

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.

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.

Event Code

An Event code is a **RAMM Contractor** item. You create and use them to make tracking Dispatch progress standard and readily understandable. Event codes can be an internal user-defined set to ensure consistency and comprehensibility or may be specified in the contract with the Network Owner. You can filter by Event code.

You use Event codes in manual Progress Notes.

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.

Failure Code

A Failure code is a **RAMM Contractor** item used to identify the Failure which caused the Fault. Failure codes are created to assist the Network Owner with Network maintenance planning. They are used for Maintenance Cost data which is gathered and grouped in **RAMM Contractor** to be transferred to **RAMM**. Maintenance Costs are used to account for Network expenditure. On each Claim line there is the option to select a Cost Group, Activity, Fault and Failure. Failure is not commonly used and may be removed in a future version of **RAMM Contractor**.

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.

Full Control Security Switch

Full Control is one of the settings of the Global Security Switch. It allows the user Permission to access, add, update or delete any record and to run any process. You manage access to **RAMM** by setting Staff Permissions. You do this to limit the actions of users to those areas of **RAMM** to which they need access in

order to be able to perform their normal work tasks. If you set a user to Full Control it means that all the individual Permission switches for that user are set to Full Control.

GIS

The Geographical Information System (GIS) is a geographical system which integrates, stores, edits, analyses, shares, and displays geographical information. It integrates hardware, software, and data for capturing, managing, analysing, and displaying all forms of geographically referenced information.

Global Security Switch

RAMM Security uses a Global Switch to grant preset levels of database access. This sits on top of the individual switches and allows you to set a specific range of values across all the individual switches in one go. This switch has four settings:

- No Access
- View Only
- Full Control
- Custom Settings.

You manage access to **RAMM** by setting Staff Permissions. You do this to limit the actions of users to those areas of **RAMM** to which they need access in order to be able to perform their normal work tasks.

GPS

The Global Positioning System (GPS) is a global navigation satellite system. GPS technology uses the

signals from multiple satellites to pinpoint the Location of a GPS receiver (device). **Pocket RAMM** users use GPS devices to positively Locate Assets in the **RAMM** database.

A GPS receiver calculates its position by precisely timing the signals sent by the GPS satellites. The receiver measures the transit time of each message and computes the distance to each satellite. Geometric trilateration is used to combine these distances with the satellites positions to obtain the Location of the GPS receiver.

Grid Screen

The Grid screen in **RAMM** is a visual report writer. You use Grid screens to work with multiple Road Inventory, Condition and other items. You adjust the Grid Layout so that it looks right and it suits your purposes. You can then view, export or print the displayed details.

Guarantee Period

The Contract Guarantee Period is a specified time length for which a Contractor guarantees that work done will remain free of Faults. Work under a Street Light or Traffic Signals Contract may be subject to a Guarantee Period.

If there is a problem with, say, a Pole and where the Guarantee option is selected for a Contract, the comment This pole is still under guarantee will be printed on Job Sheets for Dispatches for any Poles

still under Guarantee. The Guarantee Period is for one year.

This indicates to the Contractor that any Fault with this Pole is the responsibility of the company that installed it.

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.

Lux Survey

Lux Surveys are an evaluation of the lighting levels on your Roads at night. This is a measure of whether the level of illumination for a Carriageway meets predefined Lighting Category criteria.

Each Carriageway section can be linked to a Lighting Category. The Lighting Category data is for your information only and is not used elsewhere in **RAMM Contractor**.

Maintenance Cost

See Maintenance Activity

Maintenance Note Action

Maintenance Note Actions are user-defined notes which a **Pocket RAMM** or **RAMM Contractor** user can select to associate with a Dispatch or Job. The list of Maintenance Note Actions is then the list of the tasks undertaken to repair the Fault which gave rise to the Job.

You create Maintenance Note Actions to be specific to a particular combination of Asset Type and Fault Category. This way the Maintenance Note Actions available to the user are always only those relevant to the Job being performed.

For instance, if you created a Traffic Signals Fault Category of Preventive Maintenance 8 Months, you could then create a list of Maintenance Note

Actions to match the list of tasks to be performed on each Traffic Signals set every eight months.

Maintenance Note Actions are particularly useful in **Pocket RAMM**. It is much easier for an operator to select a few check boxes than to type free form notes.

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 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.

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.

No Access Security Switch

No Access is one of the settings of the Global Security Switch. It denies a user any access at all to a **RAMM** database.

You manage access to **RAMM Contractor** by setting Staff Permissions. You do this to limit the actions of users to those areas of **RAMM Contractor** to which they need access in order to be able to perform their normal work tasks.

If you set a user to No Access it means that all the individual Permission switches for that user are set to No Access.

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.

NZTA

The New Zealand Transport Agency (NZTA) is the Crown Entity responsible for State Highways. These are the strategic Roads and motorways that are about 12% (10,894 km) of all New Zealand Roads, but account for about half of the 36 billion vehicle kilometres travelled every year. It promotes land transport sustainability and safety and allocates government funding for land transport.

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**.

Organisation Code

Organisations in **RAMM Contractor** are the parties to the Contract. They are the Network Owner, the Contractor and any Subcontractors.

Normally these Organisations will already exist in the Database and will have been added by **RAMM Software Limited**. However, the situation may arise where an Organisation does not exist. In this case you need to add them. This would only arise if you were not on the **RAMM Hosting Service**.

When you are adding staff and granting Staff Permissions, you must associate the staff with an Organisation code.

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.

Permission Profile

This is another name for a Security Role. See Security Role (on page 521).

Permissions

Staff Permissions are access rights granted to specific users and groups of users. They are authorisations for users to view or make changes to the contents of aspects of **RAMM**.

You manage access to **RAMM** by setting Staff Permissions. You do this to limit the actions of users to those areas of **RAMM** to which they need access in order to be able to perform their normal work tasks.

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.

Pothole

A Pothole is a hole or pit in a Road surface. Potholes are usually caused by wear or weathering.

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.

Programme Pool

The Programme Pool is a user-defined Programme which exists to hold Dispatches which have not been Programmed. This way, they are grouped for reassignment at a later date.

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

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 Applications

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.

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 GIS

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.

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 Inventory Items

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

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 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.

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.

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.

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).

RCI

The Road Construction Index (RCI) is a value that is used to factor Maintenance Activity values to a certain date. You use this to compensate for cost inflation so that when you are comparing Maintenance Activity cost prices the comparison is more meaningful.

Record

This is a collection of information about a single object. In **RAMM** it is a grouping of all the details about a particular item such as a Berm or Street Light. You maintain single record details in a Detail screen.

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.

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.

Route Data Sheet Report

The **RAMM** Route Data Sheet report is a listing of your Assets for a Road, in the order in which you would see them if you started at one end of the Road and travelled to the other.

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.

Security Group

These are predefined Staff Permission groups. Security Groups are an efficient method of granting preset levels of access for Contractor and Network Owner staff in standard roles. Assigning a user to a Security Group sets the database access level for the user. Security Groups are preset and you can not change them.

Security Role

A Security Role is an item you create with Staff Permissions, as if it were a User Profile. Then, where there is a group of users who perform the same tasks as each other, rather than define individual Staff Permissions for each User Profile, you associate the User Profiles with one Security Role. This makes it faster grant a new user the appropriate Staff Permissions. You can also change the Staff Permissions for a whole group of people by changing the Permissions associated with their Security Role.

Security Zone

User access to **RAMM** is managed by a combination of Permissions, global security parameters, individual Security Profiles, Security Roles and Security Zones. A Security Zone is a portion of the Network. It is defined as a collection of Roads. This could be all Roads in a geographical area. Alternatively, it could be a group of Roads with a common characteristic such as Rural.

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.

Stock Asset Types

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.

Table

This is a container in the **RAMM** database that holds all the records about an aspect of all Roads in the database. This could be their Berm or Shoulder details for example. Each table holds all the information about only one aspect of all the Roads.

Traffic Signal

The Traffic Signal is also known as a traffic light. It is a signaling device to control vehicle and pedestrian traffic at an Intersection or Road. It does this using the green - amber - red series of colours to indicate the correct moment to stop, drive, ride or walk. It also uses a precise sequence for those who are colour blind. In **RAMM** Traffic Signals are positioned at Controlled Intersections.

UDT

A User Defined Table (UDT) is a **RAMM** table defined by a **RAMM** user to manage their Assets not in the default **RAMM** Asset set. This can include both Assets with a monetary value such as bus stops and Assets with no monetary value, which may still require management, such as slips.

Once set up, Assets in a UDT behave exactly like standard **RAMM** Assets. They are managed in their own Grid and Detail screens. They are available for other **RAMM** applications such as **RAMM** Asset Valuation and **RAMM Contractor**. Dispatches can be entered for work to be done on them. They can be viewed on **Maps**.

User Defined Table (UDT)

This is a **RAMM** database table created by a **RAMM** user. It is used to hold data related to an Asset or Nonasset which does not have its own default **RAMM** table. UDTs are created and maintained in **RAMM**

Manager and are available in **RAMM** and **Pocket RAMM** by default. They can be defined to be available in other **RAMM** modules if appropriate.

User Profile

A User Profile is a security item you create in **RAMM Manager**. It holds user Login and Organisation information. A user cannot log in to **RAMM** unless they have a User Profile. It is the Staff Permissions associated with the User Profile which determine what a user can see and do once they have logged in to **RAMM**.

View Only Security Switch

View Only is one of the settings of the Global Security Switch. It allows the user Permission only to view records and not to run any processes or to add, update or delete any records.

You manage access to **RAMM** by setting Staff Permissions. You do this to limit the actions of users to those areas of **RAMM** to which they need access in order to be able to perform their normal work tasks.

If you set a user to View Only it means that all the individual Permission switches for that user are set to View Only.

Warranty Period

The Contract warranty period is a specified time length for which a manufacturer warrants that Assets replaced will remain free of Faults.

Assets under a Street Light or Traffic Signals Contract may be subject to a manufacturers warranty period.

If, when setting up a Contract, you choose the Warranty Period option for Street Lights, then the option to add Light, Gear and Lamp Warranty Period information at the **Light, Gear** and **Lamp Make-Model** screens becomes available. The resulting information is used in the Warranty Failure report.

If, when setting up a Contract, you choose the Warranty Period option for Traffic Signals, then the option to add Attachment, Detector Card, Duct, End Box, Logic Rack, Loop and Pedestrian Call Box Warranty Period information at the **Attachment, Detector Card, Duct, End Box, Logic Rack, Loop** and **Pedestrian Call Box Make-Model** screens becomes available. The resulting information is used in the Warranty Failure report.

Web 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.

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