

Best Practices

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CHAPTER 1

RAMM Contractor Tasks

The purpose of this document is to describe best working practices in relation to *RAMM Contractor Tasks*.

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Timing, Roles and Internal Auditing

Timing

The processes described are categorised into *daily*, *weekly* and *monthly* tasks.

Performing these tasks at the recommended intervals will ensure that your work flows smoothly, at exactly the right time.

For example, you'll be able to present your completed claim at the end of the business month instead of a week after.

Roles

This document refers staff member roles typical of contractor organisations. Here are some definitions of those roles.

- *Contract Manager*. The contract manager runs the overall contract and requires hands-on access, but would not deal with day to day calls.
- *Contract Administrator*. The contract administrator handles the ongoing interaction between the client, public and field crews. These responsibilities would include assigning jobs, approving claim lines and preparing monthly claims.

- *Field Crew / Field Technician.* The terms field technician or field crew refer to staff that carry out the physical actions to complete a dispatch – for example, change a street lamp, re-erect a sign, fill a pothole or remove graffiti.
- *Patroller.* The patroller or patrol crew member role is limited to certain specific functions. The patroller's main job is to perform patrols at specified intervals, travelling the network, identifying problems and raising dispatches to get these issues sorted.

Internal Auditing

Depending on whether auto claiming is on or off, following these procedures gives you three levels of *auditing* on all dispatch and claim related work in RAMM Contractor. We highly recommend that auto claiming is set up for your database, as it is not only more secure but saves extra work for the contract administrator.

- *Initial field technician auditing level.* The staff that carry out the physical actions to complete a dispatch will perform basic auditing to ensure that the information entered for jobs is correct in the process of entering, completing and claiming for a dispatch. If auto claiming is not enabled on the database, the contract administrator will have to perform these actions.
- *Internal auditing at contract administrator level.* The contract administrator handles the ongoing interaction between the client, public and field crews. This audit level includes assigning jobs, ensuring that all schedule items and associated costs have been included in claims, and approving and preparing monthly claims. If auto claiming is off, this audit level will become the first level.
- *Internal auditing at contract manager level.* The contract manager runs the overall contract and requires hands-on access, but would not deal with day to day calls. This is the highest audit level. The contract manager would be required to approve the claims presented by the contract administrator.

Daily Tasks

Contract Administrator: Daily Tasks

Entering Dispatches

The two most important things to remember when entering a dispatch are to *identify* the asset correctly, and enter all details necessary to help the maintenance crew to *locate* it.

- 1 Click the **Dispatch Entry** window launch button on the toolbar of the main RAMM Contractor window:




or select **Actions > Dispatch Entry** from the menu.


- 2 Select how you wish to view your dispatches.



Click **OK** to proceed.

- 3 Click the **Add Record** button  or use the key combination CTRL+N.
- 4 It will then add a new dispatch to the List panel with a call status of **Entered** and record the date and time on the **Audit Info** tab.


If you're managing more than one asset, you'll be asked to choose one to associate the dispatch with.

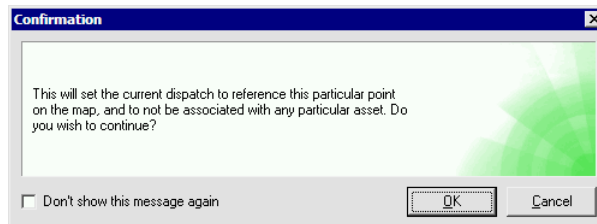
- 5 Select the contract. If you have only one contract, it will be selected in the **Contract** field. If you have more than one, select the correct contract from the drop-down list . If the List panel already has dispatches, the contract and other details will default to those of the last highlighted dispatch.

- 6 Select the **Call Type** from the drop down list, and enter the corresponding details on the **Job Source** tab.
- 7 Select the **Fault** from the drop-down list. This can either be a standard fault you can select from the drop-down list configured while setting up the contract, or you can select **Other** in the list and enter a free-form fault description in the field (you can manually type in any text-based description).
- 8 Set the **Priority**. The default is Non-emergency. The list you see is set up in the Contract Details window. Depending on those options, the emergency status will be printed on the dispatch.
- 9 In the lower section of the detail panel of the **General** tab, enter **Location, Asset** and **Feature** information.

NOTE: The more information you include, the easier it will be for your crew to find and fix the fault. The information you enter here also depends on how you identify features on your network.

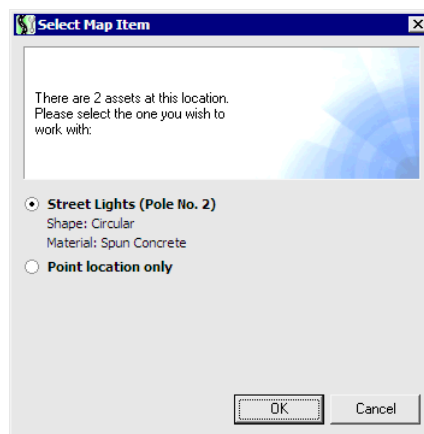
For example, if you prefer to identify street lights by Pole ID, you can configure this section to show *Likely Pole ID* instead. It's advisable that you enter at least a possible house number or Pole ID - if you don't enter any location information at all, your dispatch won't show any poles.

- 10 Click the **Move Dispatch**  button on the Map tab toolbar to assign the job to an asset. The mouse cursor will change to a crosshair, and you can now click on the road to set the dispatch location.
 - If you click on the map at a location *other than that of an asset* you'll see the following warning dialog:



Clicking OK will locate the dispatch at that exact point on the map, and you must include some notes on the **General** tab on how the crew member on the job can find the relevant asset.

- If you click *on an asset*, you will see a different dialog.



Select the relevant asset you wish to associate with the dispatch. There may be more than one asset present at that location. The **Point Location only** option allows you to set the dispatch at the exact location of the asset, but without associating it with the asset.

Another dialog will confirm your choice. With both dialogs, you have the option of ticking **Don't show this message again** if that is your preference.

- 11 When you return to the map tab, you will see the blue dot for the dispatch at the location you selected. On the **General** tab and in the List panel, the appropriate location information fields will have been updated.
- 12 **Save** the dispatch.
- 13 Once you've entered the dispatch, assign it to a staff or crew member. With Pocket RAMM, as soon as you assign the job it will appear on the crew member's PDA the next time their job list is refreshed.

Internal Auditing of Completed Dispatches (with Auto Claiming On)

Internal auditing of completed dispatches should be performed as they are completed, and at the very minimum by the end of the working day.



This policy is in effect when *auto claiming* is being used. The field technician is the first level of auditing as they are adding claim lines.

- 1 In RAMM Contractor, launch the Dispatch Claim Approval window. The default filter shows all dispatches that are *complete* and that have *pending claim lines* attached.

- 2 Select a dispatch.

- 3 Check all claim lines entered against the dispatch.

Check for duplicate claim lines and delete as required (this sometimes happens when the field crew does not realise that auto claiming is turned on, and enter a claim line manually).

Click the **Approve Claim Line** button  to approve claim lines individually, or click the **Approve All** button  to approve all claim lines.

- 4 Lock the dispatch.

- 5 Select the next dispatch and repeat steps 3 and 4 above as required.

- 6 Now click the **Filter** button drop-down list and select **All Dispatches with No Claims** to filter and view these dispatches.

- 7 Repeat steps 2 - 4 above.

- 8 Second level auditing is now complete, and the dispatches are now ready for the third level of auditing by the contract manager.

Internal Auditing of Completed Dispatches (with Auto Claiming Off)



This policy is to be used when auto claiming is *off*.

- 1 In RAMM Contractor, launch the Dispatch Claim Approval window. The default filter shows all dispatches that are *complete* and that have *pending claim lines* attached, so you may not see any dispatches in the list.

- 2 Click the filter button drop-down list and select the **All Dispatches with No Claims** option. You should now see the dispatches you need to add claim lines for in the List.

- 3 Select a dispatch.

- 4 Enter the claim lines for the dispatch.

Click the **Approve Claim Line** button  to approve claim lines individually, or click the **Approve All** button  to approve all claim lines.

- 5 Lock the dispatch.
- 6 Select the next dispatch and repeat steps 3 and 4 above as required.

This process will take longer than when auto claiming is on, as the contract administrator may need to make contact with the field technician for further information.

NOTE: With auto claiming off, internal auditing is performed at two levels only.

Contract Manager: Daily Tasks

Internal Auditing of Completed and Approved Dispatches (with Auto Claiming On)

This optional audit level for the contract manager can be used as an additional safety measure, but is not essential.

It requires some configuration of the default filter.

- 1 In RAMM Contractor, launch the Dispatch Claim Approval window.
- 2 Click the **Filter** button to launch the Filter window and reconfigure the default filter.
- 3 Set up a filter with the following criteria in the Fields panel:
 - Select **Line Status**, untick **Pending**, and tick **Approved**.
 - Select **Audit > Date Changed**, and on the Filter Criteria panel **By Value** tab, click the drop-down list to bring up a date picker and select **Today**.
 - Select **Changed By**, and on the Filter Criteria panel **In List** tab, select the contract administrator's username.

NOTE: You may wish to save this filter for future use.

- 4 Click **OK** to run the filter on the window.
- 5 Select and check only those dispatches that are locked (only those jobs with grey job icons). If claim lines need to be added or deleted, unlock the dispatch, make your changes and then re-lock it when done.

Monthly Tasks

Contract Administrator: Monthly Tasks

Adding a Claim Header for the Month

A claim header is required for *each claim period*. You should enter the claim header for the next period before the current header has passed the current period's *end* date, so that claim lines for the next period will have a claim header to link to.

For example, you may have set up a claim header for *November 2006* with a start date of 1-11-2006 and an end date of 30-11-2006. On or before 30-11-2006, you should set up the *December 2006* claim header, which will start on 1-12-2006 and end on 31-12-2006.

- 1 In RAMM Contractor, launch the Claim Maintenance window.
- 2 To enter a new claim header, add a new record.
- 3 Select the appropriate **Contract ID** from the drop-down list and insert an optional **Description**.
- 4 Enter the **Start Date** and **End Date** for the selected claim header: the start date and the end date of the next month.
- 5 The **Notes** field can be used for any useful information you wish to record about the claim header - they do not appear in any report.
- 6 **Save** the claim header.


The claim header is now ready to have claim lines attached to it. This is possible from either the Dispatch Entry window or the Dispatch Claim Approval window.

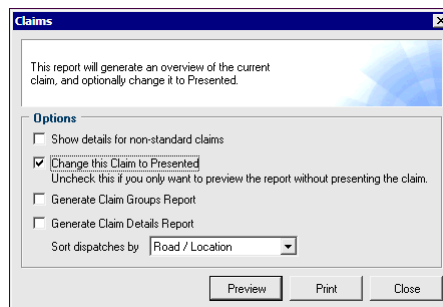
Presenting the Claim

Once all dispatches for the current month have been *approved*, *checked* and *locked*, you are ready to present the claim.

Prepare and Present the Claim

If you've kept up with the recommended schedule of daily tasks (on page 9), presenting the claim will be quite simple.

- 1 In RAMM Contractor, click the **Contract Claims** button  to launch the Claim Maintenance window.
- 2 Select the claim header you wish to present.
- 3 Select **Actions > Prepare Claim**. This stops any further dispatches from being added to the claim.
- 4 Select **Actions > Print Claim**.



This dialog will print and present the claim in one go. Ensure that the **Change this Claim to Presented** option is ticked (it is ticked by default).

- 5 Select the claim reports required - consult the network owner on this.
- 6 Click **Preview** or **Print**, and close the window when done.


The status of the claim now changes to *Presented*, and the network owner will check through the claim and sign off on it.

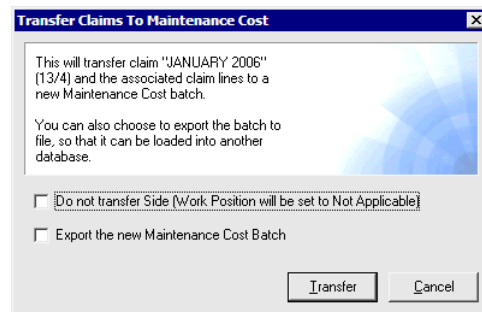
Complete the Claim and Transfer to RAMM Maintenance Cost

Once the network owner has approved the claim and formally accepted it, you will *Complete* the claim and transfer the claim to the RAMM Maintenance Cost system.

Transferring Maintenance Costs is done to fulfill 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 schedule items that have been set up for such a transfer in the RAMM Contractor Schedule

Items window. For more information, see the *Schedule Items* and *Transfer Maintenance Costs* sections of the *RAMM Contractor* guide.

- 1 In RAMM Contractor, click the **Contract Claims** button  to launch the Claim Maintenance window.
- 2 Select **Actions > Complete Claim**, and confirm by clicking **Yes**.
- 3 Transfer the completed claim to the RAMM Maintenance Cost system. Select **Actions > Transfer to RAMM Maintenance Cost**.



WARNING: Consult the network owner on the options that you should select.

- 4 Click **Transfer**, and follow the instructions to generate the *.mcb* batch file for the RAMM Maintenance Cost Grid window.

You have now completely finished the claims related processes, and all data is in RAMM.

Adding Lump Sum Items under Admin

If you have monthly lump sum items (LSI), sending in monthly claims for them can be achieved by entering a *generic dispatch* specifically for purpose.

This can be manually done from the Dispatch Entry window **Actions** menu, or by completing the generic dispatch and generating a claim line.

- 1 Open the Dispatch Entry window, remembering to select *Admin* as the asset for the dispatch, and add the generic dispatch. Put something appropriate in the pink mandatory fields.
- 2 You may wish to enter *Monthly LSI* into the notes field on the General tab to help track the dispatch.
- 3 Untick **Update Asset**, as there is no asset to update.
- 4 Add a claim line.

- 5 Complete the dispatch (**Actions > Complete Dispatch**, or CTRL+O on your keyboard).
- 6 Click **OK** on the confirmation dialog.
- 7 Click **Save** to complete the dispatch and enter a claim line.
- 8 **Save** the claim line, and follow the standard procedure for presenting the claim to the contract manager (above).

CHAPTER 2

Checking the Claim

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Checking the Claim

This document is for the use of the network owner only.

It covers the procedures related to checking a claim presented by the contractor.

How Often Should Claim Checking Be Done?


The contractor will present claims to the network owner for work done on a regular basis, and the network owner will be notified by telephone or email.

Presented claims should be checked every month.

Using the Claim Summary by Claim Line Report


RAMM Contractor produces a report that you can configure to help you with claim checking - the Claim Summary by Claim Line report.

▶ Running the Claim Summary by Claim Line Report

- 1 Launch the Claim Maintenance window from the main RAMM Contractor window by selecting **Actions > Contract Claims**, or by clicking this button on the toolbar: .

- 2 Select the claim you wish to check.
- 3 Select **Reports > Claim Summary by Claim Line** from the window menu.

The report will be generated for the selected claim. It is a report in standard RAMM Grid report format, and will show a number of default columns. For the purpose of checking the presented claim, you should now configure the columns to show only the information you need.

- 4 On the Layout panel toolbar on the left, first click the **Tick None** button  to clear the default columns.
- 5 Select **Layout > Expand All** to view all available columns.
- 6 Now select the columns listed below. As you do so, they will appear in the main area of the window.
 - **Dispatch ID**
 - **Asset Type**
 - **Location > Road ID**
 - **Location > Location(m)**
 - **Fault**
 - **Dimensions** (all columns in this group, **Length(m)**, **Width(m)**, **Depth(mm)** and **Quantity** will be selected)
 - **Item Number**
 - **Quantity**
 - **Units**
 - **Rate**
 - **Claim Amount.**

The result should look like this:



The screenshot shows a software window titled "Claim Summary by Claim Line". On the left is a tree view of fields with checkboxes. The main area contains a table with the following data:

Dispatch ID	Asset Type	Road ID	Fault	Location(m)	Length(m)	Width(m)	Depth(mm)	Quantity	Item Number	Quantity	Units	Rate	Claim Amount
7	Roading	AARONVILLE WAY	Pothole		2	0.5		1m ²	Pothole Repair	1	LS	\$0.00	\$0.00
1	Admin	AARONVILLE WAY	Drain Blockage						Debris Removal	1	hr	\$20.00	\$20.00
2	Admin	AARONVILLE WAY	Culvert weeding						Debris Removal	1	hr	\$20.00	\$20.00
3	Admin	AARONVILLE WAY	Culvert weeding						Debris Removal	1	hr	\$20.00	\$20.00

- Now drag the **Claim Amount** column header upwards to the grey grouping panel with the text *Drag a column here to group by that column.*

- Click the *arrow* on the **Claim Amount** column header so that it points downwards, and the claim lines in the window are sorted in descending order, with the larger value claim lines at the top. The report should now look like this:

Dispatch ID	Asset Type	Road ID	Fault	Location(m)	Length(m)	Width(m)	Depth(m)	Quantity	Item Number	Quantity	Units	Rate
-\$20.00												
1	Admin	AARONVILLE WAY	Drain Blockage						Debris Removal	1	hr	\$20.00
2	Admin	AARONVILLE WAY	Culvert weeding						Debris Removal	1	hr	\$20.00
3	Admin	AARONVILLE WAY	Culvert weeding						Debris Removal	1	hr	\$20.00
-\$0.00												
7	Roading	AARONVILLE WAY	Pothole			2	0.5	1m²	Pothole Repair	1	LS	\$0.00

- Use the + and - buttons on each row to expand or collapse the rows, and check the claim lines to ensure that they are what you expect. You can also right-click anywhere in the grey grouping panel and select **Expand All** if you prefer to see all details at once.
- Make a note of the *Dispatch ID* on the claim line/s that you wish to *Hold*. You can also click the **Print** button  on the toolbar to preview and print the report, or the **Export** button  to choose an export format and export it.

You can now use the Dispatch Claim Approval window to look at the details of each claim line and investigate why they are not as you expected (see below).


Using the Dispatch Claim Approval Window to Investigate and Hold Claim Lines

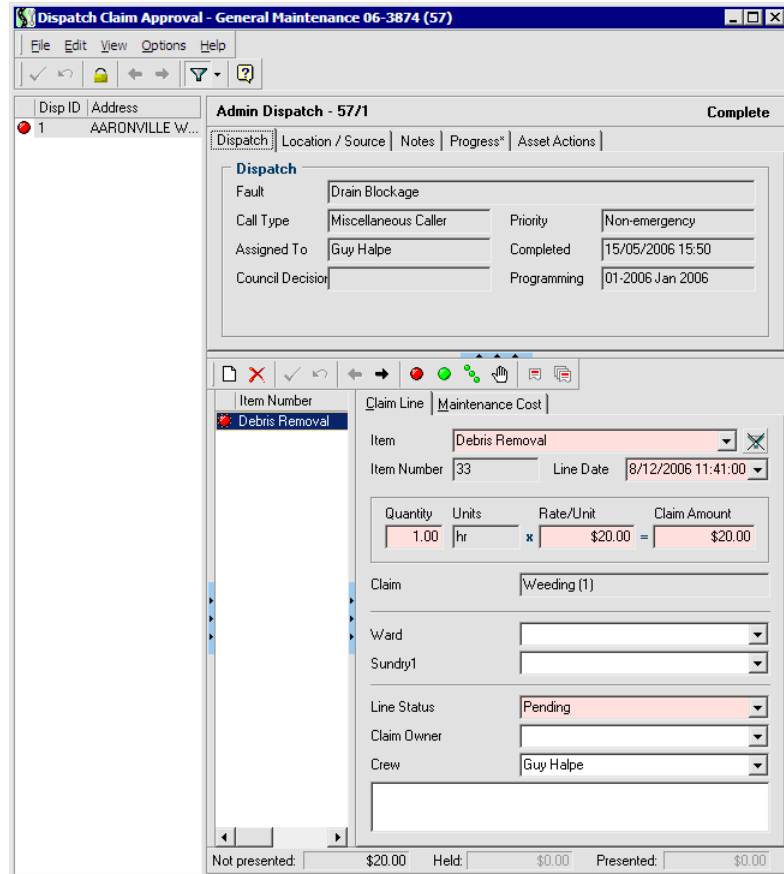
Once you have identified the claim lines you wish to investigate and made a note of the Dispatch IDs, filter the Dispatch Claim Approval window to bring up the dispatch IDs and look at the details of each claim line.


You can also use its functions to *Hold* the claim line from payment.

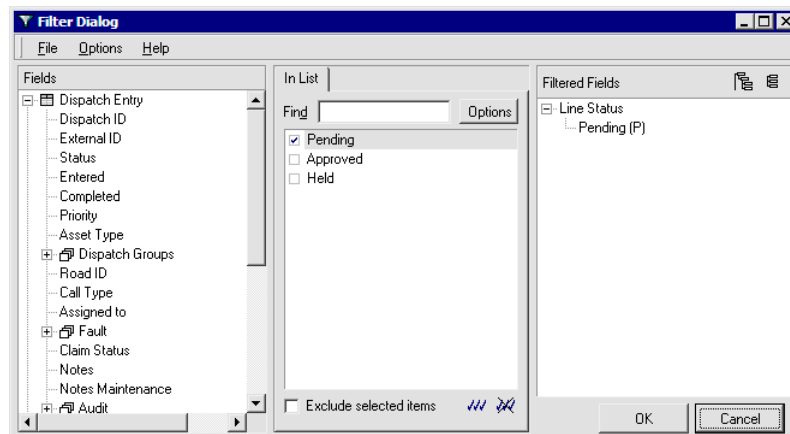
For more detailed information on the functions of the Dispatch Claim Approval window, see the *RAMM Contractor* guide.

► Investigate and Hold Claim Lines

- 1 To launch the Dispatch Claim Approval window, click the  toolbar button or select **Actions > Dispatch Claim Approval** in the main RAMM Contractor window.




2 Click the **Filter** button  on the toolbar to bring up the Filter window.



3 Select **File > Clear** to clear the default filtering criteria.

- 4 Click the **Dispatch Entry** field in the Fields panel on the left.
- 5 Click the **In List** tab in the centre Filter Criteria panel, and in the Add field type in the Dispatch IDs you wish to filter for. Press ENTER on your keyboard after each one. You will see the Dispatch IDs added to the Filtered Fields panel one by one.

NOTE: Make sure you choose the right tab, **In List**. Do not enter the Dispatch IDs on any other tab, as this will prevent you from entering multiple Dispatch IDs before you run the filter.

- 6 Click **OK** to run the filter.
- 7 Click each dispatch in the Dispatch List on the left of the window, and then examine each claim line attached to that dispatch in the Claim Lines List panel next to it (in the Claim Lines section of the window). Read the notes and the information associated with each claim line.
- 8 If required, *hold* the claim line by clicking the **Hold Claim Line** button  (CTRL+ALT+H on your keyboard).
- 9 With each claim line you hold, you will be presented with a dialog box that warns you that the claim status will change from *Presented* to *Preparing*.
- 10 **Save** each change you make.
- 11 If you have held any claim lines, email the contractor to let them know that you have held some or all of the claim lines they have presented. The contractor will then begin the process related to Disputed Claims (see "About Disputed Claims" on page 27).
- 12 If there are no held claim lines, the presented claim is ready for payment.

Disputed Claims

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About Disputed Claims

NOTE: We strongly advise that you follow this procedure regardless of whether you agree with the network owner's decision to hold the claim line. Allowing the disputed claim lines to be processed together with those that are approved will prevent you from being paid for the approved claim lines.

The purpose of this topic is to help you process and manage *disputed claims*.

When Would a Claim be Disputed?

When a claim has been presented, and the network owner wishes to query or investigate the claim before paying it, its status is changed by the network owner to *Held*. This changes the claim header status to *Preparing*, and is known as a *Disputed Claim*.

A claim could be held for a number of reasons. Here are some examples:

- It may have exceeded the budget.
- The work may not been done to specifications.
- The claim may have included resources and items unwarranted by the task.
- It may have shown excessive time on the job.

Resolving the Disputed Claim: Overview



This is an overview of the steps you take to resolve the disputed claim. We describe this process in more detail below.

- Create a new claim header for the disputed claim/s.
- Move all disputed claim lines (those the network owner has marked *Held*) to that claim header.
- Re-present the original claim header.
- Investigate and resolve the disputed claim lines.
- Re-present the disputed claim lines.

Managing Disputed Claims

In our example below, some claim lines for the month of October 2006 are in dispute, and the network owner has changed the claim line status to *Held* (this has automatically *Un-presented* the claim header and changed the header status to *Preparing*).

► To Process Disputed Claims

- 1 Launch the Claim Maintenance window from the main RAMM Contractor window by selecting **Actions > Contract Claims**, or by clicking this button on the toolbar: .
- 2 Add a new claim header with the description *Disputed Claims for October 2006*. Specify the date range as that of the disputed month (*not* the current month).
- 3 Click **Claim Lines** on the Claim Maintenance window menu bar to view the held claim lines for the *October 2006* claim header, and move them to the *Disputed Claims for October 2006* claim header. Held claim lines are identified in the List panel with this icon: .

There are two ways that you can do this:

- You can click on each held claim line, and select **Actions > Change Claim Header** from the menu to manually transfer the claim line to *Disputed Claims for October 2006*.
- You can *filter* the claim lines window to show all held claim lines, and then *bulk change* the claim lines to the *Disputed Claims for October 2006* header. See the *RAMM Contractor* guide for more details on filtering and bulk

changing claims. If you use this method, remember to re-run the filter after you finish to double check that you have changed the claim header on all the required claim lines.

- 4** Re-present the *October 2006* claim for payment (see "Presenting the Claim" on page 15). This is so that the network owner can process the payments on the undisputed claims, while you sort out the disputed ones.
- 5** You can now proceed to correct or delete the disputed claim lines in consultation with the network owner.
- 6** Once the issues with the disputed claim lines have been resolved, present the *Disputed Claims for October 2006* claim (see "Presenting the Claim" on page 15).

CHAPTER 4

Programmed Works

This document describes a structured workflow of *programmed works*, for contractors and network owners using Pocket RAMM and RAMM Contractor.

NOTE: You must have a good working knowledge of the RAMM Contractor application. See the *RAMM Contractor* guide for more information on setting up contracts, the RAMM Contractor Dispatch Entry window, and filters.

Check that the Contract Dispatch group *Council Decision* is set up, with the group items *Approved*, *Declined*, and *Re-submit*. Also ensure that the Asset Type group *Programme* is set up, with group items following this naming convention: *01-2007 Jan 2007*, *02-2007 Feb 2007* etc.

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Timeframes

- The programme is to be submitted on the 20th of each month in respect of the suggested programmed works for the following month by the contractor. This date may vary. Contact the network owner for more information.
- The network owner should approve programmes by the end of the month.
- The programme approvals should be viewed and the work scheduled on the 1st of each month.

Contractor Process: Adding the Job to the Programmed Works via Pocket RAMM

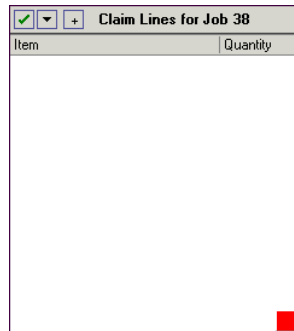
The Contractor is responsible for linking each *job* to the *programmed works*.


► Adding Job to Programmed Works via Pocket RAMM

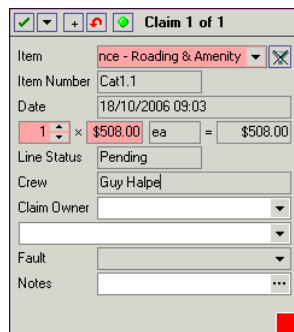
- 1 Add a job as per standard procedure: launch the **Pocket RAMM Online Actions** screen (Grey Screen) and tap **Map > Toolbox > Add Job**.
- 2 Enter the fault and asset details as per a standard job.
- 3 On the **Details** tab, set **Priority** to **Programme**.
- 4 Set the **Assigned To** field to **Me** (the crew member logged in on the device being used).
- 5 On the **Misc** tab, select the programme month in the **Programme** field - for example, *2006 August 10 2006*.
- 6 If the job is a Roothing job, fill in all **Dimensions** fields on the **Location** tab.
- 7 Tap **OK / Save** . You will then be taken to the Map screen, where you will see the job icon for the job just entered. Tap the job icon.
- 8 Pocket RAMM will open the Job Detail screen.


Details Maint Status Location	
Contract	Street Light Maintenance 2005
Job ID	38 Status Started Work
Type	Emergency patrol
Fault	Light out
Address	20 AIRFIELD RD
Feature	...
Notes	...
Likely ID	
Assigned	Guy Halpe
Priority	Emergency
Asset Type	Street Lights

- 9 Tap  icon to open the Claims screen.

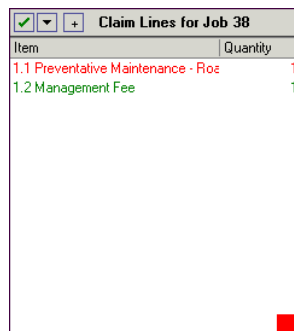


- 10 Tap **Add Item**  to add the estimated claim lines that you will use for this job. Select the schedule item from the **Item** drop-down list.



Tap **OK / Save** . Repeat this step until all claim lines are added. This will give you an estimated cost for the job to the network owner.

You'll be returned to the Claim Detail screen, where you will see the schedule items you added in the list.



- 11 Tap **OK / Save**  to go back to the Job Detail screen, and keep on tapping it to return to the Pocket RAMM Online Actions screen (grey screen).

The job has now been successfully programmed for future works.

Contractor Process: Filtering

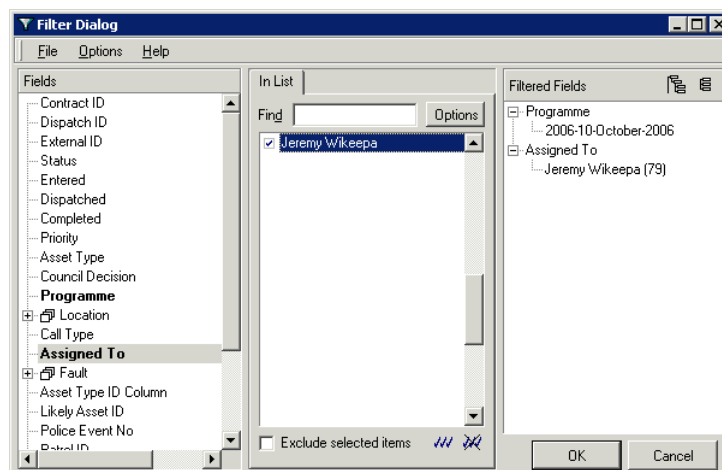
Now that the programmed works have been set up in Pocket RAMM, you are able to view and manage them in RAMM Contractor.

You'll do this by setting up a filter to:

- View all programmed works in RAMM Contractor.
- Bulk reassign jobs to the person responsible for overseeing the schedule of programmed works.

► Setting up the Filter

- 1 Launch RAMM Contractor and the RAMM Contractor Dispatch Entry window.
- 2 Launch the filter window: select **Options > Edit Filter** from the window menu, or CTRL+F.
- 3 Select **Programme** in the Fields panel. In the Filter Criteria panel, expand the tree and select the relevant programme *month*.
- 4 Select **Assigned To** in the Fields panel, and select the person who added the jobs and was signed into the device in the field.



- 5 Save the filter. Click **File > Save As**, name the filter *Programmed Works*, and click **OK** to return to the Filter window.
- 6 Click **OK** to apply the filter to the dispatches listed in the window.

NOTE: This filter will capture the dispatches that the network owner has marked *Re-submit* as well.

- 7 From the Dispatch Entry window menu, select **Actions > Bulk Change** and follow the instructions, reassigning the dispatches to the person responsible for overseeing the programmed works. Normally, this will be the network owner.

WARNING: The filter governs the dispatches returned to the List panel of the Dispatch Entry window. Changing any of the fields included in the filter in the Dispatch Entry window *after* filtering may have an effect on any processes using the filter (for example, Bulk Change), and therefore should be avoided.

- 8 The List panel of Dispatch Entry window will now reflect the changes to the dispatches.

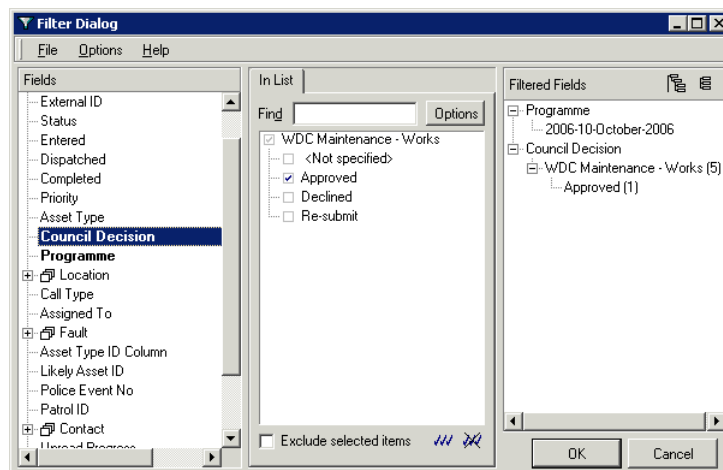
Contractor Process: Viewing Approved Programmed Work

To view the programmed work that the network owner has approved, set up a simple filter. We recommend that you do this on the 1st of every month.

▶ Setting up the Filter to View Approved Programmed Work

- 1 Launch RAMM Contractor and the RAMM Contractor Dispatch Entry window.
- 2 Launch the filter window: select **Options > Edit Filter** from the window menu, or CTRL+F.
- 3 If you're viewing approved programmes for a programme you have submitted to the network owner earlier, you can load the filter you saved in the topic above, or select **Programme** in the Fields panel, expand the criteria and select the programme you wish to view. The Filtered Fields panel will show your selection.

- 4 Select **Council Decision** from the Fields panel, expand the tree for the relevant contract, and ensure that only **Approved** is ticked.



NOTE: If you're managing more than one asset type, you may wish to further refine the programme selections by selecting **Asset Type** and adding asset criteria to the filtered fields.

- 5 Click **OK** to apply the filter to the Dispatch Entry window.
- 6 From the Dispatch Entry window menu, select **Actions > Bulk Change** and follow the instructions, reassigning the dispatches to the crew member responsible for doing the work, or assign the approved dispatches individually.

WARNING: The filter governs the dispatches returned to the List panel of the Dispatch Entry window. Changing any of the fields included in the filter in the Dispatch Entry window *after* filtering may have an effect on any processes using the filter (for example, Bulk Change), and therefore should be avoided.

- 7 The List panel of Dispatch Entry window will now reflect the changes to the dispatches.

NOTE: Once the programme has been approved, if costs change, you must contact the network owner for approval before beginning work. Failure to do this may result in the network owner refusing to pay the extra cost.

Network Owner Process: Monitoring and Approval

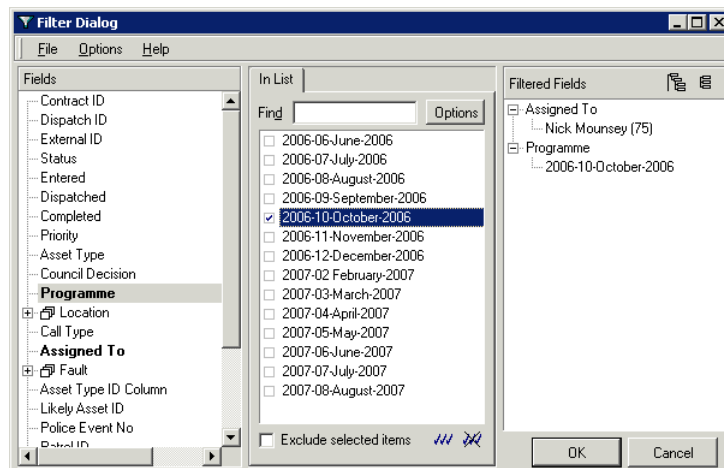
On the 20th of each month the person approving the programmed works (usually, the network owner), has the responsibility of performing a number of actions on the dispatches related to programmed work.

As with the contractor processes above:

- A filter can be configured to display the programmed works needing action.
- The filtered dispatches can then be bulk assigned back to the contractor for completion of the work.

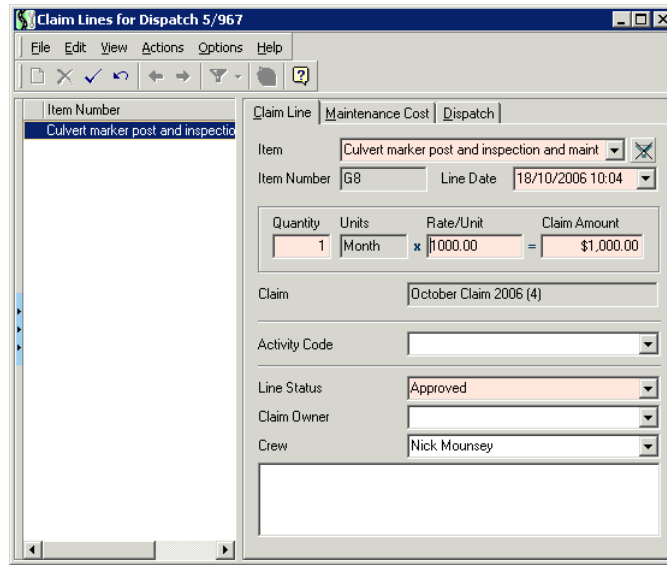
► Monitoring and Approving the Programmed Works

- 1 Launch RAMM Contractor and the RAMM Contractor Dispatch Entry window.
- 2 Launch the filter window: select **Options > Edit Filter** from the window menu, or CTRL+F.
- 3 Select **Programme**, expand this tree and select the relevant *month*.
- 4 Select **Assigned To** in the Fields panel, and select your own username.
- 5 Save the filter. Click **File > Save As**, name the filter *Approved Programmed Works*, and click **OK** to return to the Filter window.



- 6 Click **OK** to apply the filter to the dispatches listed in the window.

- 7 The List panel of Dispatch Entry window will now reflect the changes to the dispatches.
- 8 You can now view the estimates that the contractor has attached to each dispatch by selecting a dispatch and then selecting **Actions > Claim Lines** from the menu.



When done, return to the Dispatch Entry window.

- 9 For each dispatch, select an action from the list of actions pre-programmed for the Dispatch group **Council Decision**:

Approved (indicating that the work is approved for the following month).

Declined (indicating that the programmed work will never be approved, with reasons given in the notes).

Re-submit (indicating that the work should be rescheduled further in the future). You must select an alternative programme in the **Programme** field - schedule it for the following month if you are not sure of a date.

Contract...	Location...	Easting	Northing
5/967	8021	1795220.0789	5826643.8295
5/960	8147	1795135.7929	5826546.9862
5/959	8165	1795122.9679	5826533.2258

Work your way down the dispatch list, setting the decision status as above and saving each dispatch.

- 10 You now need to assign the dispatches back to the contractor. From the Dispatch Entry window menu, select **Actions > Bulk Change** and follow the instructions, reassigning the dispatches back to the contractor.

WARNING: The filter governs the dispatches returned to the List panel of the Dispatch Entry window. Changing any of the fields included in the filter in the Dispatch Entry window *after* filtering may have an effect on any processes using the filter (for example, Bulk Change), and therefore should be avoided.

- 11 The List panel of Dispatch Entry window will now reflect the changes to the dispatches.

Day Works Estimates

This document describes how to estimate for *Day Works*, for contractors and network owners using Pocket RAMM and RAMM Contractor.

NOTE: You must have a good working knowledge of the RAMM Contractor application. See the *RAMM Contractor* guide for more information on setting up contracts, the RAMM Contractor Dispatch Entry window, and filters.

Check that the Contract Dispatch group *Council Decision* is set up, with the group items *Approved*, *Declined*, and *Re-submit*.

You must also have the required permissions (for example, at Senior Staff Supervisor or Contract Manager level) to generate and process day works estimates.

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Contractor Process: Viewing Approved Day Work Estimates....	46
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Timeframes

- A day works estimate is to be submitted by the contractor, when needed or when requested by the network owner. The contractor should inform the network owner by email or telephone that an estimate has been submitted.
- The network owner should process the estimate as soon as possible and reassign it to the contractor, so that the contractor can plan for the work and

start the day works on schedule. The network owner should inform the contractor by email or telephone that the estimate has been reassigned.

- The contractor should check for the day works approved by the network owner, and schedule the physical work accordingly.




Contractor Process: Adding a Job as a Day Works Estimate via Pocket RAMM

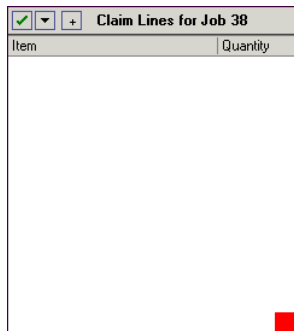
The contractor is responsible for adding each *day works estimate job*.


► Adding a Day Works Estimate Job via Pocket RAMM

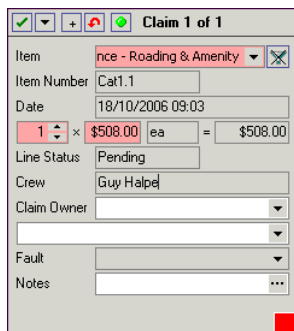
- 1 Add a job as per standard procedure: launch the **Pocket RAMM Online Actions** screen (Grey Screen) and tap **Map > Toolbox > Add Job**.
- 2 Enter the fault and asset details as per a standard job.
- 3 On the **Details** tab, set **Priority** to **Day Works**.
- 4 Set the **Assigned To** field to **Me** (the crew member logged in on the device being used).
- 5 If the job is a Roothing job, fill in all **Dimensions** fields on the **Location** tab.
- 6 Tap **OK / Save** . You will then be taken to the Map screen, where you will see the job icon for the job just entered. Tap the job icon.
- 7 Pocket RAMM will open the Job Detail screen.


Field	Value
Contract	WDC Maintenance - Works
Job ID	985
Call Type	Staff
Fault	Potholes
Address	ACACIA GR
Feature	...
Notes	All OK
Likely ID	...
Assigned	Guy Halpe
Priority	Day Works
Asset Type	Roothing

- 8 Tap the Multimedia icon  and take photographs of the job as visual proof of the costs on the claim lines you will enter below. Tap  to return to the Job Detail screen.
- 9 Tap  icon to open the Claims screen.

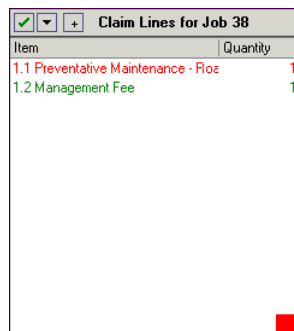


- 10 Tap Add Item  to add the estimated claim lines that you will use for this job. Select the schedule item from the **Item** drop-down list.



Tap **OK / Save** . Repeat this step until all claim lines are added. This will provide an estimated cost for the job to the network owner.

You'll be returned to the Claim Detail screen, where you will see the schedule items you added in the list.



Item	Quantity
1.1 Preventative Maintenance - Roz	1
1.2 Management Fee	1

- 11** Tap **OK / Save**  to go back to the Job Detail screen, and keep on tapping it to return to the Pocket RAMM Online Actions screen (grey screen).

The job has now been successfully entered as a day works estimate.


Contractor Process: Filtering

Now that the day works estimate has been set up in Pocket RAMM, you are able to view and manage it in RAMM Contractor.

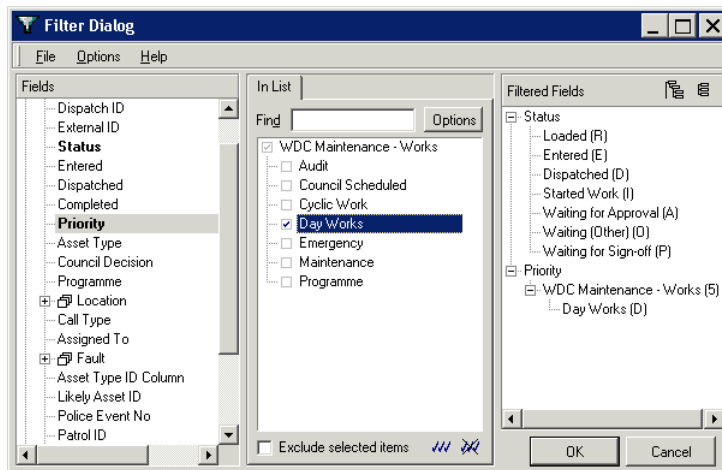
You'll do this by setting up a filter to:

- View the day works estimate job in RAMM Contractor.
- Assign the job to the person responsible for overseeing the day works.

► Setting up the Filter

- 1** In RAMM Contractor, launch the Dispatch Entry window by clicking the **Dispatch Entry** button  or by selecting **Actions > Dispatch Entry** from the menu.
- 2** Launch the filter window: select **Options > Edit Filter** from the window menu, or CTRL+F.

- 3 Select **Priority** in the Fields panel. In the Filter Criteria panel, expand the tree for the relevant contract and select **Day Works**.



- 4 Select **Assigned To** in the Fields panel, and select the person who added the jobs and was signed into the device in the field.
- 5 Save the filter. Click **File > Save As**, name the filter *Day Works Estimates*, and click **OK** to return to the Filter window.
- 6 Click **OK** to apply the filter to the dispatches listed in the Dispatch Entry window.

NOTE: This filter will capture the dispatches that the network owner has marked *Re-submit* as well.

- 7 Reassign the dispatch to the person responsible for overseeing the day works. Normally, this will be the network owner.


WARNING: The filter governs the dispatches returned to the List panel of the Dispatch Entry window. Changing any of the fields included in the filter in the Dispatch Entry window *after* filtering may have an effect on any processes using the filter (for example, Bulk Change), and therefore should be avoided.

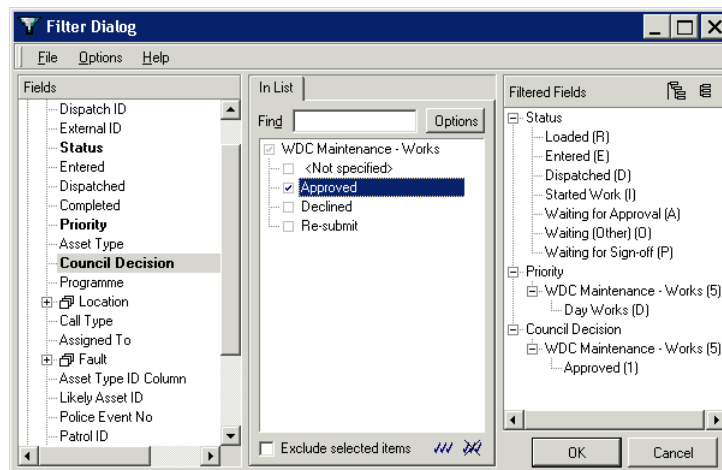
- 8 The List panel of Dispatch Entry window will reflect the change to the dispatch.

Contractor Process: Viewing Approved Day Work Estimates

To view the day work estimates that the network owner has approved, set up a simple filter.

► Setting up the Filter to View Approved Day Work Estimates

- 1 In RAMM Contractor, launch the Dispatch Entry window by clicking the **Dispatch Entry** button  or by selecting **Actions > Dispatch Entry** from the menu.
- 2 Launch the filter window: select **Options > Edit Filter** from the window menu, or CTRL+F.
- 3 If you're viewing a day works estimate submitted to the network owner earlier, you can load the filter you saved in the topic above. The Filtered Fields panel will show your selection.
- 4 Select **Council Decision** from the Fields panel, expand the tree for the relevant contract, and ensure that only **Approved** is ticked.



NOTE: If you're managing more than one asset type, you may wish to further refine the programme selections by selecting **Asset Type** and adding asset criteria to the filtered fields.

- 5 Click **OK** to apply the filter to the Dispatch Entry window.
- 6 Reassign the dispatch to the crew member responsible for doing the work.

WARNING: The filter governs the dispatches returned to the List panel of the Dispatch Entry window. Changing any of the fields included in the filter in the Dispatch Entry window *after* filtering may have an effect on any processes using the filter (for example, Bulk Change), and therefore should be avoided.

- 7 The List panel of Dispatch Entry window will now reflect the change to the dispatch.

NOTE: Once the day works estimate has been approved, if costs change, you must contact the network owner for approval before beginning work. Failure to do this may result in the network owner refusing to pay the extra cost.


Network Owner Process: Monitoring and Approval

The person approving the day works estimate (usually, the network owner), should view it and set its status as appropriate as soon as possible. The contractor should have notified him by email or telephone that an estimate is pending approval.

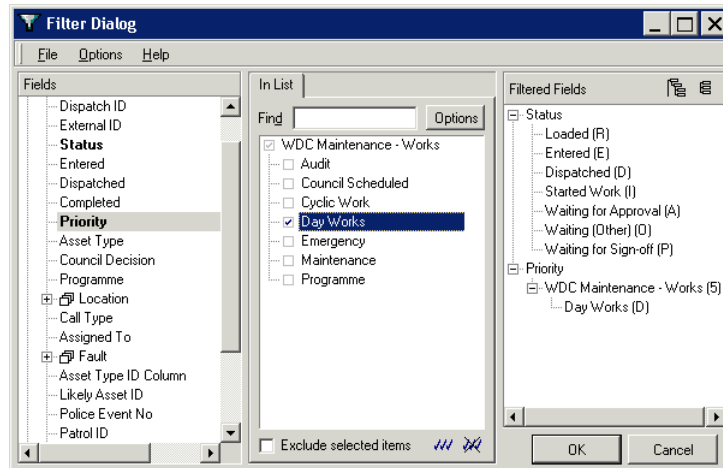
As with the contractor processes above:

- A filter can be configured to display the day works estimate needing action.
- The filtered day works dispatch can then be assigned back to the contractor for completion of the work.

► Monitoring and Approving a Day Works Estimate

- 1 In RAMM Contractor, launch the Dispatch Entry window by clicking the **Dispatch Entry** button  or by selecting **Actions > Dispatch Entry** from the menu.
- 2 Launch the filter window: select **Options > Edit Filter** from the window menu, or CTRL+F.
- 3 Select **Priority** in the Fields panel. In the Filter Criteria panel, expand the tree for the relevant contract and select **Day Works**.
- 4 Select **Assigned To** in the Fields panel, and select your own username.

- 5 Save the filter. Click **File > Save As**, name the filter *Day Works Estimates*, and click **OK** to return to the Filter window.



- 6 Click **OK** to apply the filter to the dispatches listed in the window.
- 7 The List panel of Dispatch Entry window will now show the day works estimate.
- 8 Selecting the dispatch, and then select **Actions > Claim Lines** from the menu to view the claim lines that the contractor has attached to the estimate. Make a note of any claim lines you wish to query.

When done, return to the Dispatch Entry window.

- 9 Select an action from the list of actions pre-programmed for the Dispatch group **Council Decision**:
 - Approved** (indicating that the work is approved for the following month).
 - Declined** (indicating that the work will never be approved, with reasons given in the notes).
 - Re-submit** (indicating that the work should be rescheduled further in the future).
- 10 Assign the dispatch back to the contractor.

WARNING: The filter governs the dispatches returned to the List panel of the Dispatch Entry window. Changing any of the fields included in the filter in the Dispatch Entry window *after* filtering may have an effect on any processes using the filter (for example, Bulk Change), and therefore should be avoided.

- 11 The List panel of Dispatch Entry window will now reflect the change to the dispatch.

C H A P T E R 6

10% Network Auditing

This document describes best practices for performing a *10% Network Audit* of field crew work by a *contract manager, supervisor, network owner* or *consultant*.

Pocket RAMM can be utilised as a network auditing tool, to check whether *asset information* has been correctly recorded and updated. This is done when the field crew have completed a certain number of jobs for an agreed period: a month is a typical timeframe.

The audit is not required for *all* jobs completed by the field crew. A representative sample of 10% of the completed jobs is sufficient.

The results of the audit can then be generated in reports.

NOTE: You must be familiar with the main working areas of *RAMM Contractor* and *Pocket RAMM*. See the *RAMM Contractor* or the *Pocket RAMM* guides for more detailed information.

Performing a 10% Network Audit is also subject to *Contract Specific Staff Permissions* - the person performing the audit must have **Full Control** over the **Contract** and **Dispatch** groups. See the *RAMM Contractor* guide for more information, or contact CJN Technologies.

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Setting Up RAMM Contractor for Network Auditing

RAMM Contractor needs to be set up with the appropriate *Maintenance Note Actions* before you begin network auditing.

WARNING: This procedure is extremely important to your audit, and must be carried out exactly as described.

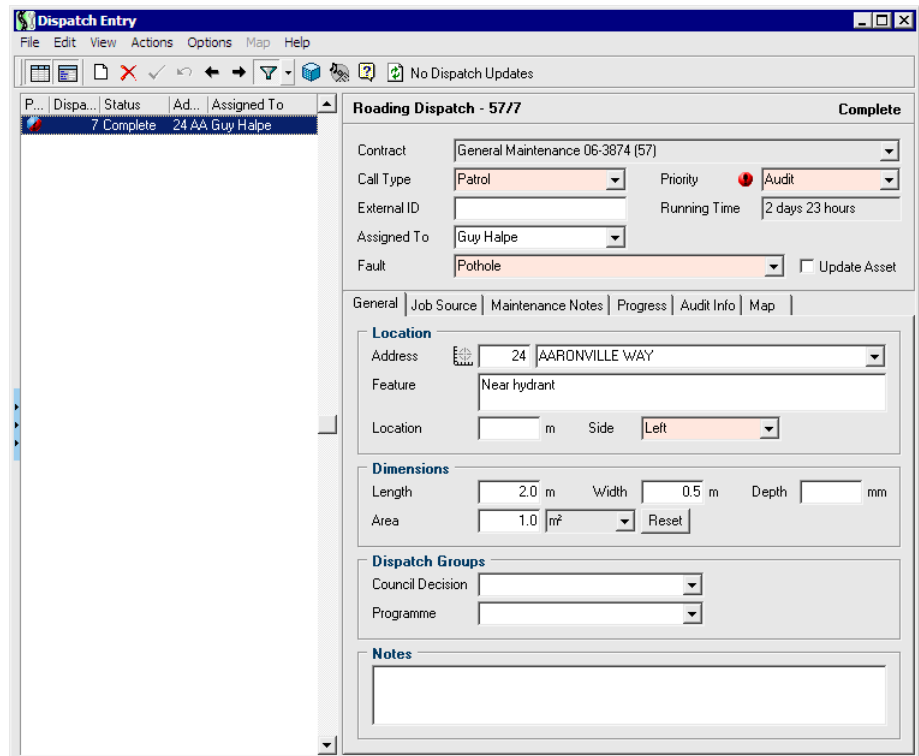
- 1 Select **Maintenance > Contract Details** to launch the Contract Details window.
- 2 Click the **Priority** tab.
- 3 Add a new Priority record, *Audit*.
- 4 **Save**.
- 5 Click the **Maintenance Note Actions** tab.
- 6 Set up the following maintenance note actions:
 - *Asset exists but RAMM Data incorrect.*
 - *No Asset but RAMM Data present.*
 - *Asset exists but no RAMM Data.*
 - *Asset present and RAMM Data correct.***Save**, and close the window to return to the main RAMM Contractor window.
- 7 You're now ready to begin auditing the network.

10% Network Auditing in Pocket RAMM

This section describes the procedure to carry out a random 10% audit of the road network in Pocket RAMM.

- 1 In RAMM Contractor, launch the Dispatch Entry window.
- 2 Filter to view all *Completed* jobs from the contractor.
- 3 Select 10% of the completed jobs at random.
- 4 Individually reassign them to yourself.

5 Change the **Priority** on each to *Audit*.



6 Use Pocket RAMM to perform physical checks on the reassigned jobs, travelling to those locations on the road network.

- 7 Inspect each job, inserting relevant maintenance notes on the job before moving on to the next. For example, if there is no fault or problem and everything is as it should be, include the maintenance note *Asset present and RAMM data correct*.

Maintenance Notes

Maintenance Notes

Asset present and RAMM data correct

Engineer Approved

Asset exists but no RAMM data

No asset but RAMM data present

Asset exists but RAMM data incorrect

Asset present and RAMM data correct

NOTE: It is critical for the 10% Network Audit that you add a maintenance note even if there is no problem and the job has been done as specified.

- 8 Include notes as required in the general **Notes** field.

Jobs

Contract: WDC Maintenance - Works

Job ID: 985 Status: Started Work

Call Type: Staff

Fault: Potholes

Address: ACACIA GR

Feature: ...

Notes: All OK

Likely ID: ...

Assigned: Guy Halpe

Priority: Audit

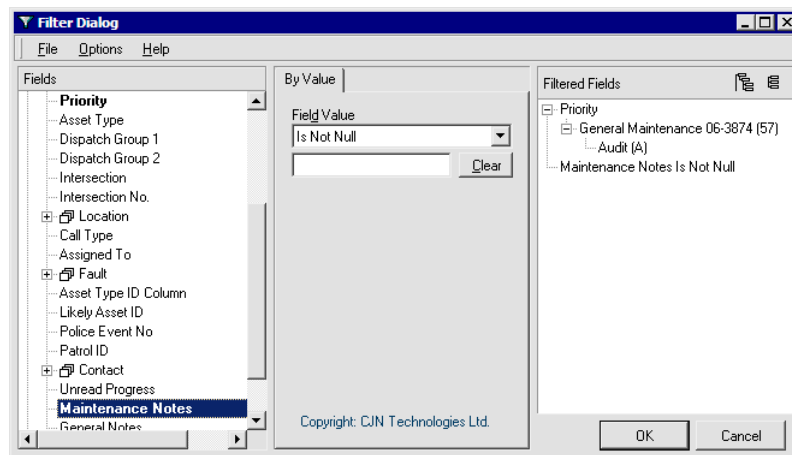
Asset Type: Roading

- 9 Return to office base and review your work in RAMM Contractor.

Filtering and Reports in RAMM Contractor

You can use the Dispatch Entry window in RAMM Contractor to filter and view the results of the field audits.

- 1 In the RAMM Contractor Dispatch Entry window, click the **Filter** icon. The Filter window appears.
- 2 In the Fields panel, select **Priority**, and then expand it to select **Audit**.
- 3 Next select **Maintenance Notes**. Ensure that the Field Value drop-down list shows *Is Not Null*.



NOTE: At this point it may be a good idea to save the filter. This makes it easy for you to apply the filter later on, and do so directly from the filter drop-down list in the Dispatch Entry window.

- 4 Click **OK** to apply the filter and return to the Dispatch Entry window. The List panel will now show the dispatches that correspond to the filter.

Generating a Report

You can now generate a report to record the results of your audit.

- 1 In the Dispatch Entry window, select **Actions > Print Dispatches**. The Print Dispatches dialog box appears.
- 2 From the **Dispatches** drop-down list, select **List**.
- 3 Tick **Title** in the Other Options section and type in a title of your choice for the report.

- 4 In the Report Selection section, untick **Full Report** and tick **Summary**.

This report will show dispatch details.

Dispatch

Dispatches: List

Date Range: to

Contract:

Claim Header:

Update printed/exported dispatch status to 'Dispatched'

Other Options

Response Time > 0 days

Unclaimed Dispatches Only

Title: June Work Audit - Assets Not Present

Order By: Date Entered

Report Selection

Full Report One dispatch per page

Summary Multiple dispatches per page

Include Claim Lines

Include Notes

Include Progress Notes

Short Summary One dispatch per line

Include Claim Lines

Preview Print Close Help

- 5 Click **Preview**. This generates the report, which you can then print or export to a file.

CHAPTER 7

Independent Network Auditing

The purpose of this best practice guide is to establish an *Independent Network Auditing* procedure to run independent of the contractor's contract.

NOTE: This document assumes that you are familiar with the main working areas of *RAMM Contractor* and *Pocket RAMM*. See the *RAMM Contractor* or the *Pocket RAMM* guides for more detailed information.

What is Independent Network Auditing Used For?

Independent Network Auditing is applied to specific *sections of carriageway* or *roads* that you know the contractor is scheduled to be working on. It enables you to compare *faults identified by you* with the *work completed* by the contractor, so that you can verify whether the faults identified by you have been identified and processed by the contractor.

For example, an independent network audit is crucial for maintaining checks on contracts that have a large percentage of Lump Sum claims, and to ensure that the network owner gets optimum value for money.

How Does It Work?

Two contracts are used for this purpose. One is used exclusively by you (*auditor's contract*) solely for identifying the faults. The other is the main contract. When the faults on both contracts are compared, you are able to verify that the network owner has had all faults on the network identified correctly by their contractor.

NOTE: This best practice guide and the related auditor's contract are *not intended to maintain assets in any way*.

Overview of the Process

- Identify faults on specific road or carriageway sections.
- Add jobs to the auditor's contract to record network faults.
- Compare the recorded faults in the auditor's contract with the faults actually repaired and claimed for in the main contract by the contractor.


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Setting up RAMM Contractor for Independent Network Auditing

RAMM Contractor needs to be set up with the appropriate *Maintenance Note Actions* before you begin network auditing.

WARNING: This procedure is extremely important to your audit, and must be carried out exactly as described.

- 1 In RAMM Contractor, select **Maintenance > Contract Details** to open the Contract Details window.
- 2 Create a new contract and name it *Auditor's Contract*.
- 3 Click the **Contract Specific Staff Permissions** button  to launch the window. You will see a new staff permissions record already set up for you. Give yourself **Full Control** over the contract.
- 4 Click the **Schedule Items** button on the menu to add a "placeholder" schedule item - the name and values are immaterial. Close the Schedule Items window to return to the Contract Details window.
- 5 Click the **Priority** tab and add a new priority record: *Audit*.
- 6 Click the **Assets** tab and select the appropriate assets required for auditing.
- 7 Click the **Maintenance Note Actions** tab.

You need to set up the following maintenance note actions for *asset data auditing* and *fault identification auditing*. When performing the actual audit, you'll be required to have two maintenance note actions, one from each category.

For asset data auditing:

- *Asset exists but RAMM Data incorrect.*
- *No Asset but RAMM Data present.*
- *Asset exists but no RAMM Data.*

- *Asset present and RAMM Data correct.*

For fault identification auditing:

- *Fault identified and repaired.*
- *Fault not identified.*
- *Fault repair inadequate.*

Save, and close the window to return to the main RAMM Contractor window.

- 8 You're now ready to begin auditing the network.

Independent Network Auditing in Pocket RAMM

► Adding the Job

- 1 Travel to section of carriageways or road you know the contractor will be working on.
- 2 Connect to the *Auditor's Contract* in Pocket RAMM.
- 3 While on site, log all faults as jobs prior to the contractor commencing work in Pocket RAMM, filling in all mandatory fields with anything appropriate except for *Audit*, which must be set as the **Priority**.
- 4 If no asset is present on the database, add a *location job*.

Details		Maint	Status	Location
Contract	WDC Maintenance - Works			
Job ID	985	Status	Started Work	
Type	Staff			
Fault	Potholes			
Address	ACACIA GR			
Feature	...			
Notes	All OK			
Likely ID	...			
Assigned	Guy Halpe			
Priority	Audit			
Asset Type	Roading			

► Auditing the Job

- 1 After the contractor has completed the specified work on the carriageway or road section, return to the site to begin auditing.

- 2 Add the two appropriate maintenance note actions to each job, one from the *asset data auditing* category and the other from the *fault identification auditing* category.

The screenshot shows a software window titled "Maintenance Notes". At the top left, there is a checked checkbox next to the title. Below the title is a text area containing the text "Asset present and RAMM data correct, Fault identified and repaired". Below the text area is a list of checkboxes with the following labels: "Engineer Approved", "Asset exists but no RAMM data", "No asset but RAMM data present", "Asset exists but RAMM data incorrect", "Asset present and RAMM data correct", "Fault identified and repaired", "Fault not identified", and "Fault repair inadequate". The checkboxes for "Asset present and RAMM data correct" and "Fault identified and repaired" are checked. A small red square is visible in the bottom right corner of the window.

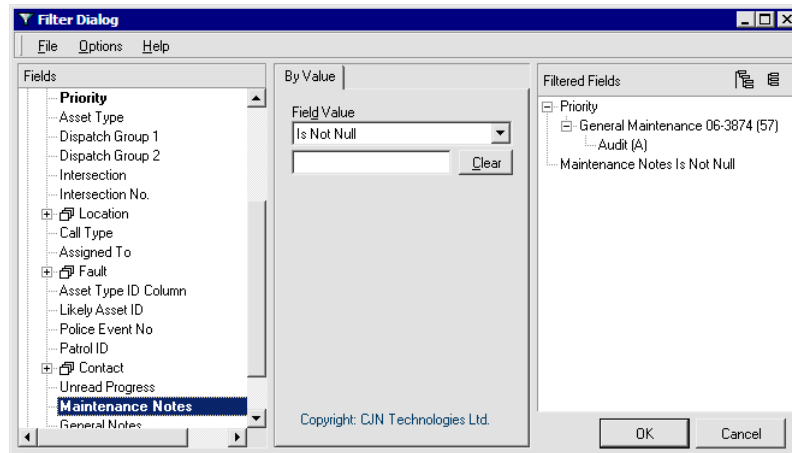
- 3 Assign the job to yourself to be able to filter and view them in RAMM Contractor.

Filtering and Reports – RAMM Contractor

You can use the Dispatch Entry window in RAMM Contractor to filter and view the results of the field audits.

- 1 In the RAMM Contractor Dispatch Entry window, click the **Filter** icon. The Filter window appears.
- 2 In the Fields panel, select **Priority**, and then expand it to select **Audit**.

- Next select **Maintenance Notes**. Ensure that the Field Value drop-down list shows *Is Not Null*.



NOTE: At this point it may be a good idea to save the filter. This makes it easy for you to apply the filter later on, and do so directly from the filter drop-down list in the Dispatch Entry window.

- Click **OK** to apply the filter and return to the Dispatch Entry window. The List panel will now show the dispatches that correspond to the filter.

Generating a Report

You can now generate a report to record the results of your audit.

- In the Dispatch Entry window, select **Actions > Print Dispatches**. The Print Dispatches dialog box appears.
- From the **Dispatches** drop-down list, select **List**.
- Tick **Title** in the Other Options section and type in a title of your choice for the report.

- 4 In the Report Selection section, untick **Full Report** and tick **Summary**.

This report will show dispatch details.

Dispatch

Dispatches: List

Date Range: to

Contract:

Claim Header:

Update printed/exported dispatch status to 'Dispatched'

Other Options

Response Time > 0 days

Unclaimed Dispatches Only

Title: June Work Audit - Assets Not Present

Order By: Date Entered

Report Selection

Full Report One dispatch per page

Summary Multiple dispatches per page

Short Summary One dispatch per line

Include Claim Lines

Include Notes

Include Progress Notes

Buttons: Preview, Print, Close, Help

- 5 Click **Preview**. This generates the report, which you can then print or export to a file.

Keeping Track of Cyclic Patrols

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About Cyclic Patrols

This purpose of this document is to establish guidelines for managing *Cyclic Patrols*.

Cyclic patrols are performed by the contractor to monitor and report on the condition of the road network. The patrols are done to the network owner's specifications, and may take place for a number of reasons. For example: to identify *potholes* or *debris*.

A cyclic patrol is budgeted for as a Lump Sum Item. For this reason it is important that both contractor and network owner are satisfied that the cyclic patrols are being performed in a timely and cost effective manner, and with the expected network coverage.

This is made possible by viewing patrol movements on a map, and generating the related *Roads Travelled* report. This report shows the following information about the patrol:

- Crew members performing the patrol
- Where the patrol has taken place
- How many times a dispatch / job has been worked on
- How long the job has taken.

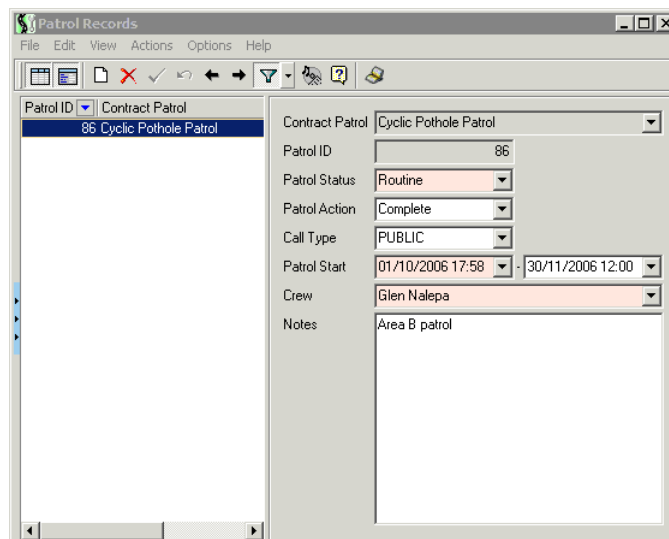
The contractor benefits from being able to see a patrol crew's movements, both current and historical, and the network owner has the certainty that the money is well spent.

Viewing Cyclic Patrols

Cyclic Patrols are viewed in RAMM Contractor.

► Viewing Patrol Records


- 1 From the main RAMM Contractor window, select **Actions > Patrol Records**.



NOTE: The information you see is filtered by default to patrols within the last month.

If you wish to view all records for a given patrol, select **Options > Edit Filter** (CTRL+F) or click the Filter button, select **Identification** in the Fields panel, and then select the patrol you wish to view in the Filter Criteria panel.

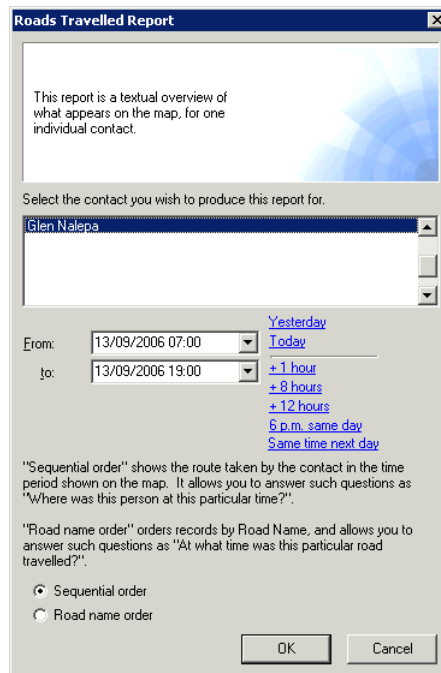
► Viewing Patrol Records on the Map

- 1 Select a patrol.
- 2 Click the Map button .

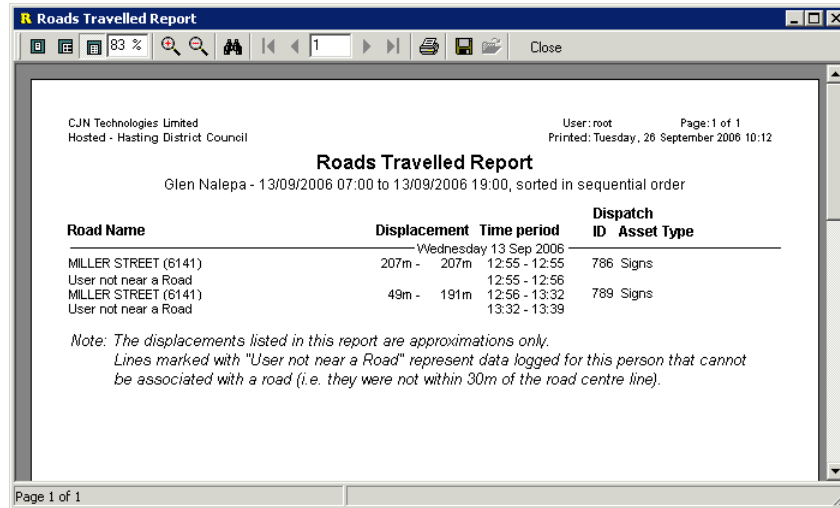
The Map window will open to display location points for the selected patrol.

This report lists the roads travelled by a given PDA device using Pocket RAMM (and thereby, the user of the device).

- 3** Select **Reporting > Roads Travelled Report**. An initial dialog will allow you to:
- Select a crew member.
 - Configure a time period.
 - Set an order for the report. Select whether to order the list roads by *time* (**Sequential order**, default setting) or an alphabetical list of roads (**Road name order**).



4 Make your selection and click **OK** to generate the report.



You can now save, export or print the report. Click **Close** when you are done.



Pocket RAMM Offline

IN THIS CHAPTER

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Pocket RAMM Offline Actions Screen Controls.....	68
About Synchronising.....	69

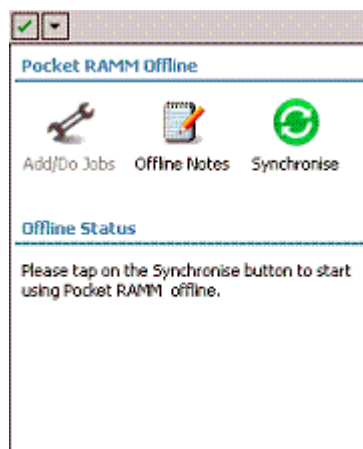
Pocket RAMM Offline: Background

You can choose one of two ways to work in Pocket RAMM in Pocket Manager.


-  **Pocket RAMM Online**, where you're connected to the database in "real-time". This is the option to use when you want your changes reflected instantly on the database, and when you are in a mobile broadband coverage area.
-  **Pocket RAMM Offline**, where you can do your work without being connected, and then connect at any time you choose to *synchronise*. This is the option to use when you are not in a mobile broadband coverage area.

With both options, you're accessing exactly the same database. You choose the method option in the Pocket Manager main screen.

This topic covers working *offline* in Pocket RAMM. To use Pocket RAMM Offline, you need to be connected and logged in to the RAMM Hosting service. In the Pocket Manager screen, tap the **Pocket RAMM Offline** icon above to launch the Pocket RAMM Offline Actions screen below.



Pocket RAMM Offline Actions Screen Controls

- 

Add/Do Jobs

Add/Do Jobs: To launch the Pocket RAMM Screen and begin working on jobs while offline. Note that the icon is usually red - in the screen image above, the icon is dimmed because Pocket RAMM has not yet been synchronised for the first time.
- Offline Notes:** Offline Notes are a way of recording text notes about a particular job. When you synchronise, the notes are visible to anyone connected to the database, and a red square icon at the bottom right hand corner in Pocket RAMM Online will pop up to indicate that notes are present and they haven't been read / processed.
- Synchronise** (see below): This control is to connect the PDA to the Hosting Service to *synchronise* your work with the live database. A number of actions will take place when you do so:

Offline notes created by you will be uploaded.

Offline notes created by others will be downloaded, and made visible to you.

New jobs or updates to existing jobs will be downloaded to your device.

- **Offline Settings** (available from **Toolbox**): Configures synchronisation settings, like how often the synchronisation will occur and which databases are to be synchronised.
- **Select Database** (available from **Toolbox**): To choose another database if you're managing multiple databases (see "Switching Between Databases" on page 73). Most users of Pocket RAMM will have just one database.

If this is the first time you're using Pocket RAMM Offline, you will need to *synchronise*. Read more about synchronising below.

About Synchronising

What is Synchronising?

Synchronising in Pocket RAMM is the action of updating the RAMM database on the CJN Hosting service *only* when you tap the Synchronise button in the Pocket RAMM Offline Actions screen and not before.

This means that your work in Pocket RAMM can continue uninterrupted, independent of the mobile broadband connection.

For example, you can use this option if you're in an area of weak network coverage and if you're constantly getting disconnected or if the network speed is slow.

For a comparison of different ways of working in Pocket RAMM, see Online and Offline Compared.

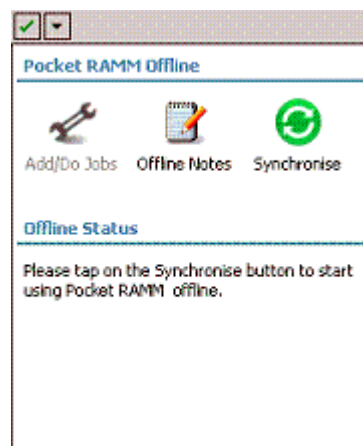
Synchronising Your Work Daily

CAUTION: CJN Technologies strongly recommends that you synchronise your work *daily, before you begin work for the day*, or more frequently. Mobile broadband technology is dependent on a number of external factors such as *coverage* and *network condition*, and you cannot be certain of being constantly connected as you travel about, doing your work. Working offline allows you to continue your work regardless of network conditions, and synchronise whenever it is convenient.


► Synchronising For The First Time

- 1 Begin by tapping **Pocket RAMM Offline**  on the Pocket Manager screen. This launches the Pocket RAMM Offline Actions screen.

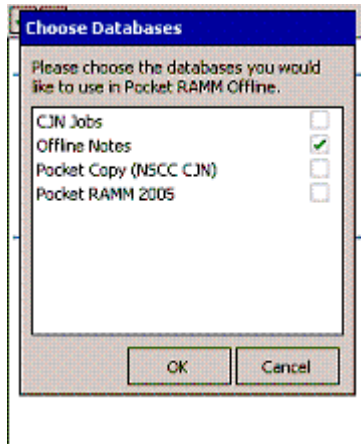
NOTE: To do the initial synchronisation of your database/s, you must be connected to the RAMM Hosting Service.



The *Offline Status* section shows the message above only if you haven't synchronised before. After initial synchronisation, it shows database information.

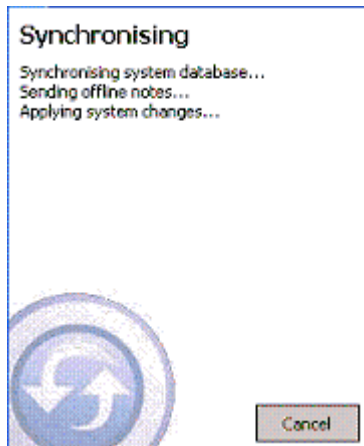
- 2 Tap the **Synchronise** button  Synchronise as directed.

- 3 Pocket RAMM will now bring up a list of databases you have access to - you must tick all the database/s in the list.

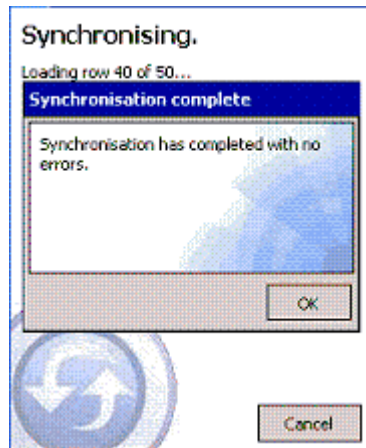


Tap **OK** to continue.

- 4 Pocket RAMM will show you the status of the synchronisation process. Please be patient, this may take a minute or two.

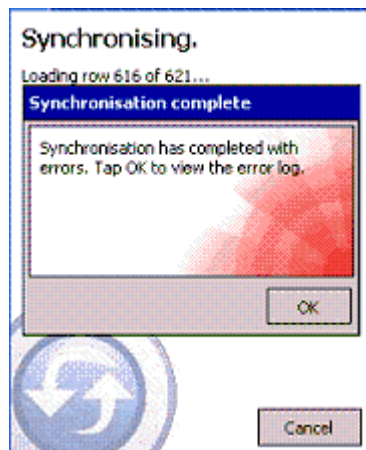


If the process completes without errors, you will see this confirmation message:



Tap OK to return to the Pocket RAMM Offline Actions screen, which will now show the database you synchronised in the *Offline Status* section.

- 5 If errors are encountered in the synchronisation process, a different message will appear:




If you are an advanced user of Pocket RAMM, you can tap **OK** to view the errors and correct them one by one.

CAUTION: If you are not familiar with the errors displayed, please leave the screen open and call us on 0800 CJNTECH (0800 256832) for assistance.

- 6 You're now ready to begin work. Tap **Add / Do Jobs** to start working on your database.


► Synchronising Every Other Time

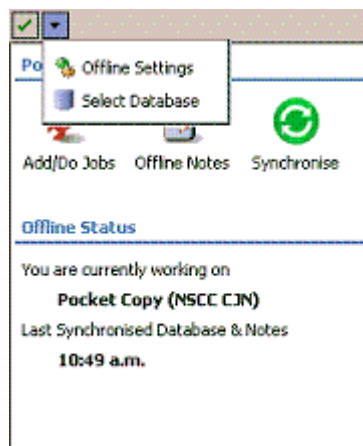
Once you've finished setting up Pocket RAMM Offline, regular synchronisation of your work is easy.

- 1 Start Pocket Manager, and ensure you are connected to the RAMM Hosting Service.
- 2 Open the Pocket RAMM Offline Actions screen.
- 3 Tap the **Synchronise** button  Synchronise.
- 4 When the synchronisation process is finished, tap **OK** to return to the Pocket RAMM Offline Actions screen and continue working.

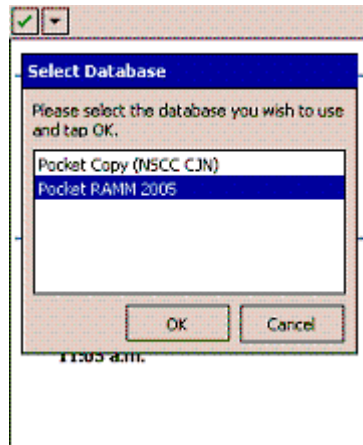
► Switching Between Databases

If you are managing more than one database, and you do not see the database you want to work with, it's easy to switch databases.

- 1 In the Pocket RAMM Offline Actions screen, tap the **Toolbox** icon  and tap **Select Database**.



- 2 Select the database you wish to work with from the list.



- 3 Tap **OK**, and the Pocket RAMM Offline Actions screen will now show the new database.