

ROSS DISPATCH

ADVANCED 1 – ROSTERS

OBJECTIVES

Upon completion of this unit, the trainee will be able to:

1. Create and edit a roster.
2. Create and manage roster versions.
3. Assign a resource to a roster position.
4. Quick Fill a resource with a roster using an Assignment Roster.
5. Fill a pending request for a configuration using an Assignment Roster.
6. Add an assignment roster to a configuration request filled with a single resource.
7. Refill a subordinate request.

ROSTER SCREEN

Summary.

- Accessed by 'Resource' menu.
- Used to create and edit master rosters for resources classified as a catalog item with a configuration.
- A roster is a list of positions (i.e., catalog items) with resources assigned.
- Rosters can be created for Aircraft, Crew, Equipment, or Overhead resource items (but not Supply or Services items).
- For resources with dedicated personnel (e.g., Type 1 Crews, overhead teams, and exclusive-use helicopters), a master roster expedites dispatching since it can be used to generate assignment roster.
- A resource can have only one master roster, however multiple 'versions' of the roster can be maintained. All, some, or none of the positions on the master roster can be assigned to a given version.
- A resource can be assigned to any number of rosters.

I. 'SEARCH RESOURCES' DIALOG BOX (ROSTER SCREEN)

- Displays when 'Roster' screen initially opened.

- Also accessible via 'Search' button.
- 'Set Search for Resources' section of dialog box.
- 'Search Results' section of dialog box – Displays resources for which you are the Home Dispatch, excluding those that are on a contract of type CWN or Agreement.
- 'View' button – Brings up View Resource screen.

II. 'ROSTER' SECTION OF 'ROSTER' SCREEN

A. Fields at top of screen:

- Resource Name.
- Roster Name.
- Has Non-Local Resources.
- Has Position with No Version.

B. 'New' button – Not applicable if resource already has a roster.

- Resource Name.
- Roster Name
- Table of configuration qualifications.

- To use a qualification as template for roster:
 - Select qualification.
 - Check 'Use Selected Qualification with Configuration as Template' check box.
 - Positions are added to the roster in order they appear in the configuration.

 - If check box not checked, will build roster from scratch.

 - 'View Configuration' button.

 - 'Enter Purpose/Documentation for Roster'.

 - Click OK.

 - If select qualification having its own configuration, sub-configuration not added to roster.
- C. 'Edit' button – Used to edit roster name, and create and edit roster versions. Brings up 'Edit Roster' dialog box.
- Resource Name – Cannot be edited in this dialog box.

 - Roster Name – Can change by clicking in field and typing.

- 'New' button.
 - Enter name.
 - Enter a one or two digit abbreviation or identifier in Code field.
 - Default check box – Default version of master roster will be basis for assignment rosters.
 - 'Save button.
- To edit a version, select it in table, revise information, and click Save.
- 'Delete' (version) button.
- Has Position with No Version – Yes/No whether a position on roster is not assigned to any versions. Only displays if roster has a version.

D. 'Search' button.

E. 'View Resource' button.

F. 'Documentation' button.

G. 'Delete' button (on main Roster screen) – Deletes the roster and all its versions.

III. 'PRIMARY ROSTER POSITION' SECTION OF 'ROSTER' SCREEN

- Table defaults to displaying all positions on the roster, regardless of whether they are assigned to any versions.
- 'Version' field – Can set version context of the table. Only displays if roster has at least one version.

A. Primary Roster Position table.

- Version – Roster versions to which the position has been assigned. Only applicable if there is a version.
- Reserved – If a resource reserved for a roster, and resource is used independent of roster, warning message displays, but does not restrict use of resource.
- # – Row number, which indicates sequential order of the roster position.

B. 'Action' button.

Cannot perform actions such as adding a position or changing a restriction while viewing a specific roster version; they must be performed while viewing the entire master roster.

1. Add Position – Cannot add an alias, service, or Supply catalog item.

- ‘Add Roster Positions’ dialog box.
- Positions are added to the bottom of the roster.

2. Sequencing of Positions.

- Order of positions on master roster or master roster version dictates initial order of positions on assignment roster.
- Two methods for changing:
 - ‘Move Position Up/Down’ buttons.
 - ‘Set To #’ button.

3. Delete Position.

- Deletes position from roster and all versions.

- Position numbering is updated such that there are no gaps in the numbering.
4. Mark as Reserved.
 5. Clear Reserved.
 6. Change Restriction – Applicable to Overhead only. Error message displays if restriction changed such that an alternate for position no longer qualifies.
 7. Remove Resource.
 8. Assign Roster Versions – Used to add/remove positions to/from roster versions.
 - Only applicable if roster has at least one version.
 - Can access all versions of roster at same time, regardless of whether viewing a specific version on Roster screen.
 - Brings up ‘Assign Roster Versions’ dialog box.
 - Select a version from ‘Positions For Version’ drop-down list.

- Roster Positions table – Positions not yet assigned to the version.

- Add Position, Add All Positions, Remove Position, and Remove All Positions buttons.

- Positions For Version table – Positions assigned to the version.

C. 'Go To' button.

D. 'View' button.

E. 'Print' button.

IV. 'ADD/SWAP ROSTER RESOURCES' SECTION OF 'ROSTER' SCREEN

- Used to assign resources to roster positions.

- Cannot perform add/swap while viewing a specific roster version – must display entire roster.

- Resource cannot be 'removed' or from a status-only dispatch.

A. 'Inventory' tab – Used to assign a resource from ROSS inventory to selected position, or add a resource as an alternate for the position.

1. 'Add as Alternate' button – Adds selected resource as an alternate to selected position.

2. 'Add/Swap' button.

- If a resource is not yet assigned to selected position, assigns the selected resource.
- If a resource is already assigned to selected roster position, swaps out assigned resource with the selected resource.
- If resource being added or swapped has its own master roster, it is not displayed as a nested roster.

3. 'View' button.

B. 'Alternates' tab – Used to assign a resource, identified as an alternate for a position, to the position as the primary.

- Alternates display in table.
- 'Add/Swap' button – Same as on 'Inventory' tab.

- 'Remove' button – Removes selected resource as an alternate for selected position.
- 'View' button.

QUICK FILL SCREEN

V. QUICK FILLING A RESOURCE WITH A MASTER ROSTER

A. **Assign with Master Roster** – Builds assignment roster using the resource's master roster.

- Resource cannot already have an open assignment roster.
- Only parent resource must be a Quick Fill resource; subordinate resources on roster do not.
- 'Select Master Roster Version' dialog box.
- If selected resource and all members of roster are available, receive message stating they can be assigned immediately without accessing Assignment Roster.
- Positions added to assignment roster in order they appear on master roster (or master roster version).

- If one or more roster positions are not filled with an available resource, 'Assignment Roster' dialog box appears.
- Subordinate requests are not created for positions that do not have a resource assigned.

B. **ASSIGNMENT ROSTER.**

1. Assignment roster is a temporary, request-specific roster consisting of a list of positions (i.e., catalog items) with resources assigned.
2. Used to manage creation, filling, and placing (non-local resources only) of subordinate requests for a selected parent request.
3. Fields in upper left of screen:
 - Master Roster has Versions – Indicates by Yes/No whether roster versions exist.
 - Assignment Resource Name – Defaults to name of resource, but can click in field and change.
4. 'Request Creation' section does not display when quick filling, so clicking OK closes out the assignment roster.
5. 'Assignment Roster' section of dialog box – Similar columns as on 'Roster' screen.

Request column – Displays request associated with position.

- Each position has an assigned 'request', based on sequential order of the positions.
- Since root number of requests cannot be known until assignment roster is closed and parent request is created, it is displayed as a '?' (e.g., E-?.1)

6. Sequencing of Positions.

- Order of positions dictates request numbers to be assigned to associated subordinate requests.
- Request for first subordinate position will always be numbered with suffix '.1', second will be '.2', etc.
- True at any level of nesting within assignment roster.
- Can change using 'Move Position Up/Down' buttons or 'Set To #' button.
- Cannot move a position down to another position that is the parent of a nested group.
- If parent of a nested group is moved, all positions within the group are moved so as to stay with the parent.

7. **'Action' button** (in 'Assignment Roster' dialog box).
 - a. Add Position.
 - Used to add a subordinate position under selected configuration position.
 - If a resource is assigned to the position, it must be local.
 - b. Delete Position – When a position is deleted, position numbering is updated to avoid gaps.
 - c. Remove Resource.
 - Resource cannot be removed from a position if a request has already been created for the position.
 - If position has subordinates, they are deleted.
 - d. Change Restriction (Overhead only) –Receive warning if a primary or alternate cannot meet new restriction. Clicking Yes removes assigned resource.

- e. Delete All – Deletes all positions except root.

- f. Build From Configuration – Builds out subordinate positions of selected configuration position.
 - Not applicable to root.

 - Positions added in order they appear in the configuration.

 - If a resource is assigned, it must be local.

 - Not applicable if subordinate request has been created for the position.

- g. Set/Unset Add Roster Later – Used to indicate whether there is intention to add assignment roster later to request to be created for selected configuration position.
 - Must be true for selected position:
 - Has a local resource assigned.
 - Has no subordinate requests.
 - Assigned resource is not currently assigned to another request.
 - Assigned resource is not on a CWN or Agreement contract.

- To clear setting, select Set/Unset Add Roster Later again.
- h. Build From Master Roster – Applies master roster of selected resource to selected configuration position.
- If two or more versions exist, Select Master Roster Version dialog box displays.
 - Clears any existing subordinate positions of selected parent position.
 - Positions are added to assignment roster in order they appear on master roster.
 - Can be used to change the master roster version currently applied to a position.
8. 'View' Button.
9. 'Print' Button.
10. **'Add/Swap Roster Resources' section of 'Assignment Roster' dialog box** – Used to assign resources to positions.
- When assigning non-local resource, only resource can be assigned, not the configuration or roster.

- However, non-local resource can be reassigned with roster or configuration if your dispatch is resource's current dispatch.

- A resource from a status-only dispatch cannot be assigned to an assignment roster position. The associated pending request must be placed and filled status-only.

- a. 'Inventory' Tab of 'Assignment Roster' dialog box.
 - For a resource to display it must:
 - Be a non-removed inventory.

 - Have a qualification matching selected position.
 - If Overhead with restriction of Developmental, resource need only be from same catalog.
 - Qualification can be expired unless position is Overhead with restriction of Developmental.

 - If Overhead, have a qualification status matching restriction placed on position as follows:
 - If restriction is Trainee Acceptable, status must be Trainee or Qualified.
 - If restriction is Trainee Required, status must be Trainee.
 - If restriction is Developmental, status can be any value as long as resource is qualified.

- If restriction is Qualified Only, status must be Qualified.

- b. 'Roster Position Resources' Tab of 'Assignment Roster' dialog box.
 - Column of note: 'Primary' – Applicable only to Aircraft, Crew, and Equipment catalogs. Indicates by Yes/No whether catalog item is resource's primary qualification.

 - For a resource to display it must:
 - Not yet be assigned to a position on the assignment roster.
 - Not be 'Returned from Assignment'.
 - Be designated as either a primary or alternate on a position on master roster for same catalog item. Exception: If Overhead with restriction of Developmental, resource need only be on roster position from same catalog.
 - Have a qualification matching assignment roster position. Exception: If Overhead with restriction of Developmental, resource need only be from same catalog.
 - If Overhead, have a qualification status matching restriction placed on position as follows:
 - If restriction is Trainee Acceptable, status must be Trainee, Qualified, or Unknown.
 - If restriction is Trainee Required, status must be Trainee.
 - If restriction is Qualified Only, status must be Qualified or Unknown.

c. **'Add/Swap' button.**

- Add/Swap with Resource Only – Assigns selected resource to selected position.
 - If resource is local, and position has resource assigned and sub positions, resource is replaced and sub positions and assigned resources are retained.
 - If resource is non-local, and position is a configuration, the resource is assigned but all sub positions are deleted.

- Add/Swap with Resource Only (Add Roster Later) – Assigns group resource as a single resource, with intention to add assignment roster later. Displays only if:
 - Position is for a configuration catalog item.

 - Resource is:
 - Local.
 - Not currently assigned to a request.
 - Not on a CWN or Agreement contract.

- Add/Swap with Resource using Roster – Assigns the resource and its master roster.
 - Displays only if:
 - Position is for a configuration catalog item.
 - Resource has a master roster.
 - If resource has roster with multiple versions, and no default designated Select Master Roster Version dialog box displays.
 - Master roster positions and assigned resources are added to assignment roster.
 - If position already has sub positions, they are replaced with the master roster positions.
 - Positions added in order they appear on master roster.
- Add/Swap with Resource using Configuration – Assigns resource to selected position, and adds the subordinate positions of the configuration
 - Displays only if:

- Position is for a configuration catalog item.
- Resource is local.

- If position already has sub positions, they are replaced with the configuration positions.

- Positions added in order they appear in configuration.

- At any level of nesting, a resource cannot be assigned to a subordinate position if there is not a resource assigned to the parent position.

d. 'View' button.

11. Click OK to exit. Cannot again access the assignment roster.

12. If a resource on assignment roster is Unavailable (but not assigned to an incident), associated position is ignored.

13. All subordinate positions without assigned resources are ignored.

14. Requests are generated and filled, and resources are set 'At Incident'.

15. When subordinate requests created for positions with non-local resources assigned:

- If resource is unassigned, ROSS places request to home (or preposition) dispatch.
- If resource is assigned, ROSS places request to incident dispatch requesting that specific resource.

PENDING REQUEST SCREEN

VI. FILLING A PENDING REQUEST FOR A CONFIGURATION

- A. 'Available' tab 'Fill' button contains following options for filling a configuration request with an assignment roster:
- Fill with Assignment Roster using Master Roster.
 - Fill with Assignment Roster using Configuration.
 - Fill with Assignment Roster (build from scratch).
 - Fill with Assignment Roster for Selected Items.
 - Fill with Prepositioned Roster.
 - Reassign Prepositioned Roster.

- Fill with Temporary Group.

B. 'Fill with Assignment Roster using Master Roster'.

1. 'Request Creation Options' section of Assignment Roster – Dictates resource and request actions to be performed when dialog box is closed.
 - a. 'Save and continue later' radio button – No requests are generated.
 - b. 'Commit Resources (save and continue unassigned later)' radio button.
 - Creates and fills subordinate request for each position with assigned resource.
 - Unassigned positions are unaffected (i.e., no pending requests are created).
 - 'Unavailable' resources must be removed or replaced with available resource.
 - After clicking OK, Fill Request dialog box displays.

- Travel option selected applies to all resources being assigned at that time.

 - If ETD/ETA is set for parent, cannot overlap assignment history of any sub resources. If overlap, ROSS sets sub to Travel TBA.

 - Cannot edit sub requests or their resources via assignment roster.
- c. 'Commit Resources and Create Outstanding Requests' radio button – Same as 'Commit Resources (save and continue unassigned later)' radio button except pending subordinate request created for each unassigned position.
- d. 'Set [request number] as Filled' check box.
- Applicable only with 'Commit Resources and Create Outstanding Requests' radio button.

 - Sets root request as 'filled'.

 - Closes out the assignment roster in ROSS.

C. **'Fill with Prepositioned Roster' and 'Fill with Temporary Group'** options.

1. 'View Prepositioned Group' in 'View' button beneath tabs on Pending Request – Allows assignment roster of prepositioned group to be viewed.
2. For temporary group, 'Assignment Resource Name' field defaults to blank and a name must be entered.
3. 'Request Creation Options' section of assignment roster does not display.
4. Following positions from preposition assignment roster are included on new assignment roster. Positions filled with resources:
 - With status of Available, Reserved, Mob En Route, Tentative Release (At Incident), Released (At Incident), or Reassigned (At Incident) on preposition incident.
 - Assigned to a non-preposition incident, regardless of status.
5. Following positions from preposition assignment roster are not included on new assignment roster:
 - Positions that have not been filled.

- Positions where assigned resource is:
 - Unavailable.
 - Demob En Route from preposition incident.
 - Reassigned (At Incident) on a non-preposition incident.

- 6. 'View Pending Requests' in 'View' button beneath table – Displays requests still pending for prepositioned group.

- 7. 'Inventory' Tab – If selected parent resource prepositioned, does not display resources that are part of the prepositioned group.

- 8. 'Roster Position Resources' Tab – Only displays if using 'Fill with Temporary Group' option. Displays resources from master roster not currently assigned to assignment roster position.

- 9. 'Remaining Roster Resources' Tab – Only displays when filling a request with a prepositioned group using the 'Fill with Prepositioned Roster' option. Resource must:
 - Not yet be assigned to a position on the assignment roster.
 - Be a non-removed inventory.
 - Not be 'Returned from Assignment'.
 - Not be from a status-only dispatch.
 - Have a qualification matching position (unless Developmental Overhead, in which resource need only be from same catalog).

- If Overhead, have a qualification status matching restriction placed on position as follows:
 - If restriction is Trainee Acceptable, status must be Trainee, Qualified, or Unknown.
 - If restriction is Trainee Required, status must be Trainee.
 - If restriction is Qualified Only, status must be Qualified or Unknown.

- Have one of following be true with respect to its preposition assignment:
 - Resource is currently Available or Unavailable on the preposition.
 - Resource was subsequently assigned to a local non-preposition incident.
 - Resource was subsequently assigned to a non-local non-preposition incident with the 'Release to Preposition' option selected.

10. 'Add/Swap' Button.

- 'Add Swap with Resource using Roster' – Disabled on 'Remaining Roster Resources' tab.

- 'Add/Swap with Resource using Prepositioned Roster'.
 - Available only if selected position is configuration, and selected resource has prepositioned roster.

 - Adds parent resource and all subordinates from prepositioned group to assignment roster.

11. **'Fill with Temporary Group'**.

- Delete positions you do not want to be part of temporary group.
- After filling selected configuration request with a portion of prepositioned group, parent and remaining subordinates are available to fill requests on other non-preposition incidents.

D. **'Reassign Prepositioned Roster'** option.

- Reassigns prepositioned group to a new preposition incident.
- Not enabled if any subordinates currently assigned to non-preposition incident or are unavailable.
- Displays Reassign Roster screen, based on assignment roster of selected parent resource.

VII. REASSIGNING THE PARENT OF A CONFIGURATION

- When resource on parent request is reassigned, **'Reassign Roster'** screen is displayed.
- Statements in bottom section of screen.

- When parent reassigned, filled subordinate requests on original assignment inherit travel selected for parent to new assignment.
- Resources (on parent and subordinates) reassigned in context of qualification they are presently using.
- Order of positions, and their associated subordinate request number suffixes, are retained.
- Disposition of a parent request and its subordinates after a reassignment is dependent on status of requests at time of reassignment.

VIII. ADDITIONAL ACTIONS

- A. Add Assignment Roster – Used to add assignment roster to a configuration request that was filled with a single resource.
 1. Intent to add roster later does not have to have been indicated for request.
 2. Only filling dispatch can add an assignment roster.
 3. Option only displays if:
 - Request:

- Is not for an Overhead item.
 - Does not have status of Reassigned.
 - Must be resource's current assignment if non-prepo, or if prepo'd must be the prepo assignment.
- Resource:
 - Is inventory.
 - Not on CWN or Agreement contract.
 - One of following is true:
 - Not prepositioned and the request is the resource's current assignment.
 - Prepositioned and the request is the resource's current preposition assignment.

4. Brings up Add Assignment Roster Option dialog box.

- Add Assignment Roster using Configuration – Position added to assignment roster in order they appear in the configuration.
- Add Assignment Roster (build from scratch).
- Add Assignment Roster using Master Roster.
 - If two or more versions of master roster exist, and no default is designated, Select Master Roster Version dialog box displays.
 - Positions added to assignment roster in order they appear on master roster.

5. 'Add Assignment Roster' Request Creation Options.

- Primary difference is that no pending requests can be created (i.e., positions without an available resource assigned are deleted).

- Add Assignment Roster Option dialog box.

- 'Save and continue later' radio button – Same functionality as previously discussed.

- 'Commit Resources (delete unassigned)' radio button displays instead of 'Commit Resources (save and continue unassigned later)' radio button.
 - Creates sub requests for positions for which assigned resource does not have a status of Unavailable.
 - Once selected and OK button clicked, you cannot again access assignment roster.

- 'Commit Resources and Create Outstanding Requests' radio button – Disabled.

- 'Set [request number] as Filled' check box – Disabled.

6. ROSS performs following when assignment roster added:
- If parent resource is Reserved, Mob En Route, At Incident or Available (on prepo) when assignment roster added:
 - Requests created and filled for assigned positions.
 - Resources on local non-prepo are reassigned.
 - For resources on non-local incident, requests placed to current dispatch.
 - For unassigned non-local resources, requests placed to home dispatch.
 - Travel of parent copied to filled subordinate requests.
 - Requests not created for unassigned positions or positions with unavailable resource assigned.
 - Requests not created for local resources with assignment history that overlap parent's travel.
 - If parent resource is Released (At Incident), Tentative Released, or Demob En Route when assignment roster added
 - Same as above, with exception of two request placing actions.

7. Travel Assignments Overlap – In general, when adding an assignment roster, travel set for each local resource cannot overlap any other assignments in resource's history. No check for travel overlaps with non-local resources.

B. Continue Assignment Roster – Used to access an in-progress assignment roster.

- Only displays if true for request:
 - Has an associated assignment roster.
 - Your dispatch is filling dispatch.
 - Is not on source incident undergoing merge.
- Not available once root request has been set to filled (on Assignment Roster).

C. Cancel Assignment Roster – Used to cancel an in-progress assignment roster.

- Cannot cancel once a subordinate request has been created
- Displays only if true for request:
 - Has an associated assignment roster.
 - Has no subordinate requests.

- Your dispatch is filling dispatch.
- Is not on a source incident undergoing a merge.

D. Refill Subordinate Request – Applicable only to subordinate requests unfilled (on 'Request Status'). Brings up 'Refill Subordinate Request' dialog box.