



# **Basic Unit 8 – Release and Reassign**

**ROSS Dispatch Training Student Workbook  
Release 2.16.12**

For ROSS Steady State  
Operations & Maintenance



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## Basic Unit 8 – Release and Reassign

### OBJECTIVES

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

1. Release a resource from an incident.
2. Edit a resource's release.
3. Reassign a resource to another incident request.
4. Quick Fill reassign a resource to another incident.
5. Release a resource from a non-local incident.
6. Manage release authorization.

**BASIC UNIT 8: RELEASE AND REASSIGN**

**8.1 Objectives**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.1 Objectives	<p><b>Refer to Slide ROSSD-SL-BASIC-08-01 (Release &amp; Reassign).</b></p> <p><b>Refer to Slide ROSSD-SL-BASIC-08-02 (Objectives).</b></p> <p><b>Refer to Slide ROSSD-SL-BASIC-08-03 (ROSS Dispatch Process).</b></p>

**8.2 Overview**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.2 Overview	

**8.3 Incident Resources Screen > Filter Criteria Panels**

☑	Topic	Notes
☐	8.3 Incident Resources Screen > Filter Criteria Panels	<ul style="list-style-type: none"> <li>• Accessed by Incident menu or IR toolbar button.</li> <li>• Used to release and reassign resources.</li> <li>• Most Recent Incidents toolbar drop-down list applies (but not to Non-Local Support Requests radio button).</li> <li>• Set Incident Filter panel.                             <ul style="list-style-type: none"> <li>– Local radio button.</li> <li>– Non-Local Support Requests radio button and drop-down list – Provides access to non-local support requests your dispatch created and retained control of.</li> </ul> </li> <li>• Set Incident Filter panel.                             <ul style="list-style-type: none"> <li>– Set Catalog Filter section.</li> </ul> </li> </ul>

☑	Topic	Notes
☐	8.3 Incident Resources Screen > Filter Criteria Panels (continued)	<ul style="list-style-type: none"> <li>– Set Resource Filter section.                             <ul style="list-style-type: none"> <li>▪ Set Filter Criteria for Incident Resources.</li> </ul> </li>   <li>▫ Days or Less At Incident – Covers At Incident through Demob En Route.</li>   <li>▫ Travel Mode check box and radio buttons – Limits search results to resources that used selected mode of travel at least once during trip to incident.</li>   <li>▪ Set Filter Criteria for Individual Resources.</li> </ul>

**8.4 Incident Resources Screen > Incident Resources Grid**

☑	Topic	Notes
☐	8.4 Incident Resources Screen > Incident Resources Grid	<ul style="list-style-type: none"> <li>• Only resources whose mobilization ETD has passed but demobilization ETA has not passed display.</li> </ul>

☑	Topic	Notes
☐	8.4 Incident Resources Screen > Incident Resources Grid (continued)	<ul style="list-style-type: none"> <li>• Resources used to fill untracked requests do not display.</li>   <li>• Grid columns.                             <ul style="list-style-type: none"> <li>– Column of note: Release Authorization.</li> </ul> <p style="margin-left: 40px;">Note: Point out that release authorization is discussed later in this unit.</p> </li>   <li>• Go To button</li>   <li>• View button.</li>   <li>• Print button.</li>   <li>• Show Subordinates check box.</li> </ul>

### 8.5 Release Resource Dialog Box

☑	Topic	Notes
☐	8.5 Release Resource Dialog Box	<ul style="list-style-type: none"> <li>• Release only enabled for Mob En Route and At Incident resources.</li>   <li>• Can release:               <ul style="list-style-type: none"> <li>– Resources on requests for which release authorization is not required.</li>   <li>– Resources on requests for which release authorization is required and:                   <ul style="list-style-type: none"> <li>▪ Resource is Tentative Released, and</li>   <li>▪ Release authorization received.</li> </ul> </li> </ul> </li>   <li>• Release Status panel.               <ul style="list-style-type: none"> <li>– Release radio button.                   <ul style="list-style-type: none"> <li>▪ Enabled if authorization is not required, or if required and has been obtained.</li>   <li>▪ Disabled if authorization is required but not yet obtained.</li> </ul> </li> </ul> </li> </ul>

☑	Topic	Notes
☐	8.5 Release Resource Dialog Box (continued)	<ul style="list-style-type: none"> <li>– Tentative Release radio button.                             <ul style="list-style-type: none"> <li>▪ Travel options are not applicable for tentative release.</li> </ul> </li>   <li>▪ Cannot tentatively release a Mob En Route resource for which release authorization is not required.</li>   <li>• Release Date/Time.</li>   <li>• Travel panel.</li>   <li>• Release Options panel – Applies to prepositioned resources.</li>   <li>• Release To Location.                             <ul style="list-style-type: none"> <li>– If you multi-select resources to be released, cannot set a Release To location.</li> </ul> </li> </ul>

☑	Topic	Notes
☐	8.5 Release Resource Dialog Box (continued)	<ul style="list-style-type: none"> <li>– Pick Release Location dialog box tabs: Organizations, Airports, and Locations.</li>   <li>• Available for Reassignment – Only applicable to tentative Release.                             <ul style="list-style-type: none"> <li>– Tentative Released (A).</li>   <li>– Tentative Released (U).</li> </ul> </li>   <li>• Enter Documentation.</li>   <li>• Release To Base.                             <ul style="list-style-type: none"> <li>– Applicable when releasing a Record Manager Only tactical aircraft resource.</li>   <li>– Pick Release To Base dialog box.</li> </ul> </li> </ul>

**8.6 Edit Release**

☑	Topic	Notes
☐	8.6 Edit Release	<ul style="list-style-type: none"> <li>• To edit a resource’s release your dispatch must be one of the following:                             <ul style="list-style-type: none"> <li>– Incident Dispatch.</li> <li>– Home Dispatch.</li> <li>– Dispatch that dispatches for resource's Current Operating Base.</li> <li>– Requesting Dispatch (if non-local support request with control retained).</li> </ul> </li>   <li>• Edit Release dialog box.                             <ul style="list-style-type: none"> <li>– Tentative Release radio button – Only the Incident Dispatch can tentatively release a resource.</li>   <li>– Cancel Release radio button.                                     <ul style="list-style-type: none"> <li>▪ If Tentative Released or Released (At Incident), only Current Dispatch can cancel (this is also true for non-local support requests regardless of control).</li> </ul> </li> </ul> </li> </ul>

☑	Topic	Notes
☐	8.6 Edit Release (continued)	<ul style="list-style-type: none"> <li>▪ If Demob En Route, only Incident Dispatch can cancel (unless non-local support request, where only controlling dispatch can cancel).</li>   <li>▪ After a resource’s release is cancelled, its status is set to At Incident (or Available on preposition if applicable).</li>   <li>▪ Can also cancel a resource’s release via the ‘Cancel Release’ Action button option on Request Status screen.</li>   <li>– Release Date/Time – Disabled if Tentative Release radio button selected and resource is Mob En Route.</li> </ul>

**8.7 Practice Session**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.7 Practice Session	

**8.8 Reassign Resource Dialog Box > Pending Requests Tab**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.8 Reassign Resource Dialog Box > Pending Requests Tab	<ul style="list-style-type: none"> <li>• Used to reassign resource to another incident request.</li> <li>• Search for requests pending with your dispatch that resource could fill.</li> <li>• Local Incidents and Non-local Incidents radio buttons.</li> <li>• External Incident Requests check box.</li> </ul>

☑	Topic	Notes
☐	8.8 Reassign Resource Dialog Box > Pending Requests Tab (continued)	<ul style="list-style-type: none"> <li>• Set Search Criteria for Requests panel.                             <ul style="list-style-type: none"> <li>– Search by Qualification radio button – Displays resource's current qualifications.                                     <ul style="list-style-type: none"> <li>▪ For Overhead:   <ul style="list-style-type: none"> <li>▫ Also displays status of each qualification: Qualified (Q) or Trainee (T).</li> <li>▫ Qualifications that are Unknown (U), Blocked (B), or Unqualified (N) do not display.</li> </ul> </li> </ul> </li> <li>– Search by Catalog Item radio button.                                     <ul style="list-style-type: none"> <li>▪ Applicable to Overhead only.</li> <li>▪ Search for a role the resource can perform but is not qualified for.</li> <li>▪ Choose Catalog Item for Reassignment dialog box.</li> </ul> </li> </ul> </li> </ul>

☑	Topic	Notes
☐	8.8 Reassign Resource Dialog Box > Pending Requests Tab (continued)	<ul style="list-style-type: none"> <li>• Select Request for Reassignment grid.                             <ul style="list-style-type: none"> <li>– Grid columns.</li> <li>– View button.</li> </ul> </li>   <li>• Reassign Request dialog box – Identical to Reassign Resource dialog box that displays when reassigning from Pending Request screen.</li>   <li>• When reassigning a resource whose original assignment was filled by an external supply cache, ROSS:                             <ul style="list-style-type: none"> <li>– Prevents reassignment if reassign-to request or reassign-to incident does not have a financial code.</li> <li>– If a prepositioned NFES resource, sets Release Option to Release to Home.</li> </ul> </li> </ul>

**8.9 Reassign Resource Dialog Box > Quick Fill Reassignment Tab**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.9 Reassign Resource Dialog Box > Quick Fill Reassignment Tab	<ul style="list-style-type: none"> <li>• Can reassign one or more resources.</li>   <li>• Does not display if selected resource is from Supply catalog.</li>   <li>• Set Resource Criteria for Reassignment panel.</li>   <li>• Select Incident for Reassignment panel.</li>   <li>• Request is created on selected incident, using system default block, and filled with resource being reassigned.</li> </ul>

**8.10 Practice Session**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.10 Practice Session	

**8.11 Resources (Nonlocal Incident) Screen > Filter Criteria Panel**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.11 Resources (Nonlocal Incident) Screen > Filter Criteria Panel	<ul style="list-style-type: none"> <li>• Accessible from Resource menu.</li> <li>• Must have Dispatch Manager role to access.</li> <li>• Allows either Home Dispatch or Preposition Dispatch to release, or edit release of, their resources from a non-local incident.</li> <li>• Also used:                             <ul style="list-style-type: none"> <li>– To add a subordinate request to a non-local parent request.</li> </ul> </li> </ul>

☑	Topic	Notes
☐	8.11 Resources (Nonlocal Incident) Screen > Filter Criteria for Filled Requests Panel (continued)	<ul style="list-style-type: none"> <li>– By a Home Dispatch to add documentation to a request for which they are not in the Ordering Chain.</li> <li>• Filter criteria fields.</li> </ul>

**8.12 Resources (Nonlocal Incident) Screen > Filled Requests Grid**

☑	Topic	Notes
☐	8.12 Resources (Nonlocal Incident) Screen > Filled Requests Grid	<ul style="list-style-type: none"> <li>• Does <u>not</u> display Reassigned (At Incident) and Demob En Route resources.</li> <li>• Only displays tracked requests.</li> <li>• Grid columns.</li> <li>• View button.</li> </ul>

**8.13 Resources (Nonlocal Incident) Screen > Action Button**

☑	Topic	Notes
☐	8.13 Resources (Nonlocal Incident) Screen > Action Button	<ul style="list-style-type: none"> <li>• Release.                             <ul style="list-style-type: none"> <li>– Can release resource from a non-local support request whether or not your dispatch retained control.</li>   <li>– Can release resource from a non-local preposition incident even if resource has been assigned to a non-preposition.</li>   <li>– Release Resource dialog box.</li> </ul> </li>   <li>• Edit Release.</li>   <li>• Add Subordinate Request – Applicable only to filled configuration requests.</li> </ul>

☑	Topic	Notes
☐	8.13 Resources (Nonlocal Incident) Screen > Action Button (continued)	<ul style="list-style-type: none"> <li>• Add Documentation – Necessary when a resource is reassigned from one non-local incident to another non-local incident, in order for Home Dispatch to provide reassign-to Incident Dispatch information about resource.</li> </ul>

**8.14 Release Authorization Screen > Set Filter Criteria for Incidents Panel**

☑	Topic	Notes
☐	8.14 Release Authorization Screen > Set Filter Criteria for Incidents Panel	<ul style="list-style-type: none"> <li>• Accessible from Resource menu.</li> <li>• Must have Dispatch Manager role, with ‘Release Authorization Management’ function assigned.</li> <li>• Used to control release of resources assigned to incidents managed by your subordinate dispatches.</li> <li>• Can be designated at catalog, category, or catalog item level for each individual incident.</li> </ul>

☑	Topic	Notes
☐	8.14 Release Authorization Screen > Set Filter Criteria for Incidents Panel (continued)	<ul style="list-style-type: none"> <li>• Cannot be set for catalog item that is:                             <ul style="list-style-type: none"> <li>– An alias (i.e., not unique).</li> <li>– A service.</li> <li>– Untracked.</li> </ul> </li>   <li>• If release authorization required, must be obtained from Incident Dispatch’s parent dispatch.</li>   <li>• Incident Dispatch tentatively releases the resource; parent dispatch then either authorizes the release or leaves the release ‘on hold’.</li>   <li>• Release authorization not required for resource assigned to non-local support request for which control was maintained by requesting dispatch.</li>   <li>• If release authorization is required for parent resource, it is required for subordinates, whether or not catalog, category, or catalog item of subordinate request is designated as requiring release authorization.</li> </ul>

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.14 Release Authorization Screen > Set Filter Criteria for Incidents Panel (continued)	<ul style="list-style-type: none"> <li>Filter criteria fields.</li> </ul>

**8.15 Release Authorization Screen > Select Incident Grid**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.15 Release Authorization Screen > Select Incident Grid	<ul style="list-style-type: none"> <li>Grid columns.</li> <li>View button.</li> </ul>

**8.16 Release Authorization Screen > Manage Release Authorization for Incident > Release Restrictions Tab**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.16 Release Authorization Screen > Manage Release Authorization for Incident > Release Restrictions Tab	<ul style="list-style-type: none"> <li>Used to create or delete release restrictions.</li> <li>Set Filter Criteria for Release Restrictions panel.</li> </ul>

☑	Topic	Notes
☐	8.16 Release Authorization Screen > Manage Release Authorization for Incident > Release Restrictions Tab (continued)	<ul style="list-style-type: none"> <li>• Release Restrictions grid – Displays release restrictions in place for selected incident.</li>   <li>• New button and Add Release Restriction dialog box.</li>   <li>• Cannot edit an existing restriction; it must be deleted and then created again.</li> </ul>

**8.17 Release Authorization Screen > Manage Release Authorization for Incident > Incident Resources Tab**

☑	Topic	Notes
☐	8.17 Release Authorization Screen > Manage Release Authorization for Incident > Incident Resources Tab	<ul style="list-style-type: none"> <li>• Used to take action on tentatively released resources assigned to selected incident.</li>   <li>• Set Filter Criteria for Incident Resources panel.</li> </ul>

☑	Topic	Notes
☐	8.17 Release Authorization Screen > Manage Release Authorization for Incident > Incident Resources Tab (continued)	<ul style="list-style-type: none"> <li>• Incident Resources grid.                             <ul style="list-style-type: none"> <li>– Columns of note:                                     <ul style="list-style-type: none"> <li>▪ Release Authorization – Displays ‘Hold’, ‘Authorized’, or ‘N/A’ as appropriate.</li>   <li>▪ Resource Status – Status is followed in parenthesis by either ‘A’ or ‘U’ indicating resource’s availability for reassignment.</li> </ul> </li>   <li>– Displays resources:                                     <ul style="list-style-type: none"> <li>▪ Assigned to a request requiring release authorization.</li>   <li>▪ With status of Mob En Route or Tentative Released.</li>   <li>▪ On request with status of Tentative Released.</li> </ul> </li> </ul> </li> </ul>

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.17 Release Authorization Screen > Manage Release Authorization for Incident > Incident Resources Tab (continued)	<ul style="list-style-type: none"> <li>• Action button.                             <ul style="list-style-type: none"> <li>– Hold Release.                                     <ul style="list-style-type: none"> <li>▪ Switches status from ‘Authorized’ to ‘Hold’.</li> </ul> </li> <li>– Authorize Release.                                     <ul style="list-style-type: none"> <li>▪ Switches status from ‘Hold’ to ‘Authorized’.</li> </ul> </li> <li>– View/Add Documentation.</li> </ul> </li> <li>• View button.</li> </ul>

**8.18 Practice Session**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.18 Practice Session	

**8.19 Objectives Review**

<input checked="" type="checkbox"/>	Topic	Notes
<input type="checkbox"/>	8.19 Objectives Review	<b>Refer to Slide ROSSD-SL-BASIC-08-04 (Objectives Review).</b>