Merge Resources - merging duplicate records

This guide explains how to merge one or more duplicate resources into one master record, which remains once the merge is complete. Topics in this chapter include:

- Merging duplicate resources
- Exploring the merge resources function in detail.

To access the Merge Duplicate Resources screen

You must have the Dispatch Manager role to merge duplicate resources.

- On the Administration menu, click Merge Resources.

Merge Resources screen
Merging duplicate resources

This section explains how to merge two or more local resources into one master record. It also briefly explains how to view additional request information about a resource as available, including the resource request, the requesting unit, the filling unit, and the home dispatch unit.

For more information about viewing additional request information about a resource see, “Request Status - managing the status of request.”

To merge two or more resources into a master record

1. On the Merge Resources screen, click the Catalog drop-down arrow, and then click the Catalog of your choice.
2. Click the Category drop-down arrow, and then click the Category of your choice.
3. In the Resource Name box, type the name of the resource, and then click the Filter button.

Remember, you can perform a wildcard search by typing * (asterisk) in the Resource Name box.

4. Under Search Results, click the Resource Name of your choice, and then click the Select Resource To Merge button.
5. Continue selecting Resource Name(s) to be merged, clicking the Select Resource To Merge button after each selection.
6. To designate the Master Record under Resources to Merge, click the Resource Name of your choice, and then click the Select Master Record button.
7. When finished, click the Merge button.
8. On the Merge Resource Confirmation dialog box, click Yes to confirm or click No to cancel.

To clear your selections

- On the Merge Resources screen, click the Clear Search button that is located between the Resources to Merge and the Master Record tables.

To remove a resource from the merge

- On the Merge Resources screen under Resources to Merge, click the Resource Name of your choice, and then click the Remove Resource from Merge button.
To view information about a resource item

- On the Merge Resources screen under Resources to Merge or Master Record, click the Resource Name of your choice, and then click the View Resource button.

You can also select the Resource Name from the Search Results table, click the View button, and then click View Resource.

To view the home dispatch unit

1. On the Search Results table, click the Resource Name of your choice.
2. Click the View button, and then click View Home Dispatch Unit.
3. When finished reviewing the information, click Close.

To change the status of a resource

Before merging, resources items must have a qualification and status of either available (at home - not on prepositioned incident) or unavailable.

2. On the Resource Status screen, search for and then click the Resource of your choice.
3. Click the Select Status drop-down arrow, and then select one of the following
   - click Available to change the status of the resource item to available
   - click Unavailable to change the status of the resource item to unavailable, and then click the Unavailable Reason drop-down arrow and select the reason of your choice.
4. To save the changes to the available status for that resource, click the Set Availability button.

Exploring the merge resources function in detail

Remember these key points when merging duplicate resources:

- You can only merge local resources that are managed by the dispatch center performing the merge.
- To merge resources managed by different offices, you must first coordinate the resource transfer to the office that manages the master record.

To transfer resources between dispatch centers see, “Transferring resource items,” in “Resource Item - working with resources.”
- All items you select to be merged must be from the same catalog and category. For example, Aircraft/Airtanker, Equipment/Engine, or Overhead/Positions.

- All items must have a valid qualification and the status of either
  - available - at home and not on prepositioned incident
  - unavailable.

- If merging any overhead resources that were imported into ROSS, the selected master record must be an imported resource, rather than a hand-entered record. Imported resources display a record source of “IQS” or “IQCS.”

- You can select a removed resource as a master or a merged resource. If selecting it as the master record, it remains removed even after the merge.

  For more information about removing resources see, see, “Removing and deleting resources,” in “Resource Item - working with resources.”

- ROSS copies the assignment history of all merged resources to the surviving master record. The master record may have overlapping assignment histories.

- Once merged, ROSS physically deletes the merged resources from the database.

- The master record has an autodoc entry that identifies the items merged into it, the date and time, and the user ID that performed the merge.

- For contracted resources, the master record replaces merged resources on any contract they may have been on. You can choose to be notified when a merged resource is removed and replaced on a contract that is managed by your dispatch center.

- If a merged resource has a master roster, that roster is deleted.

- If a merged resource is assigned to a position on a master roster, it is removed and replaced by the master record. You can choose to be notified when a merged resource is removed and replaced on a master roster that is managed by your dispatch center.

- You can not merge or select as a master record a resource assigned as the parent or to a subordinate position on an open assignment roster. Instead, ROSS advises you of which dispatch center is filling the assignment roster.

- When merging resources with different names, the name of the master record is copied to all closed/completed requests for the merged resource(s).

- When merging an overhead resource with Web Status access, the Web Status account is deleted and is not copied to the master record.

- When merging overhead resources with ROSS user accounts
- user accounts of those merged resources are deleted and not copied to the master record.
- if the master record also has a user account, only the roles assigned to and the personal settings of the master record remain after the merge.
- all access to dispatch organizations that had been granted to the merged resources are deleted and not copied to the master record’s user account.
- requests and/or incident documentation attributed to that user are unaffected by the merge.

- User-entered documentation from any merged resource is copied to the master record.
- If a resource item has been transferred to your dispatch center but the transfer is not complete, such as waiting for a new provider organization to be designated, then you can not designate that resource as the master record in a merge. However, those resources with incomplete transfers may be merged into a master record.