Roster - managing subordinate requests

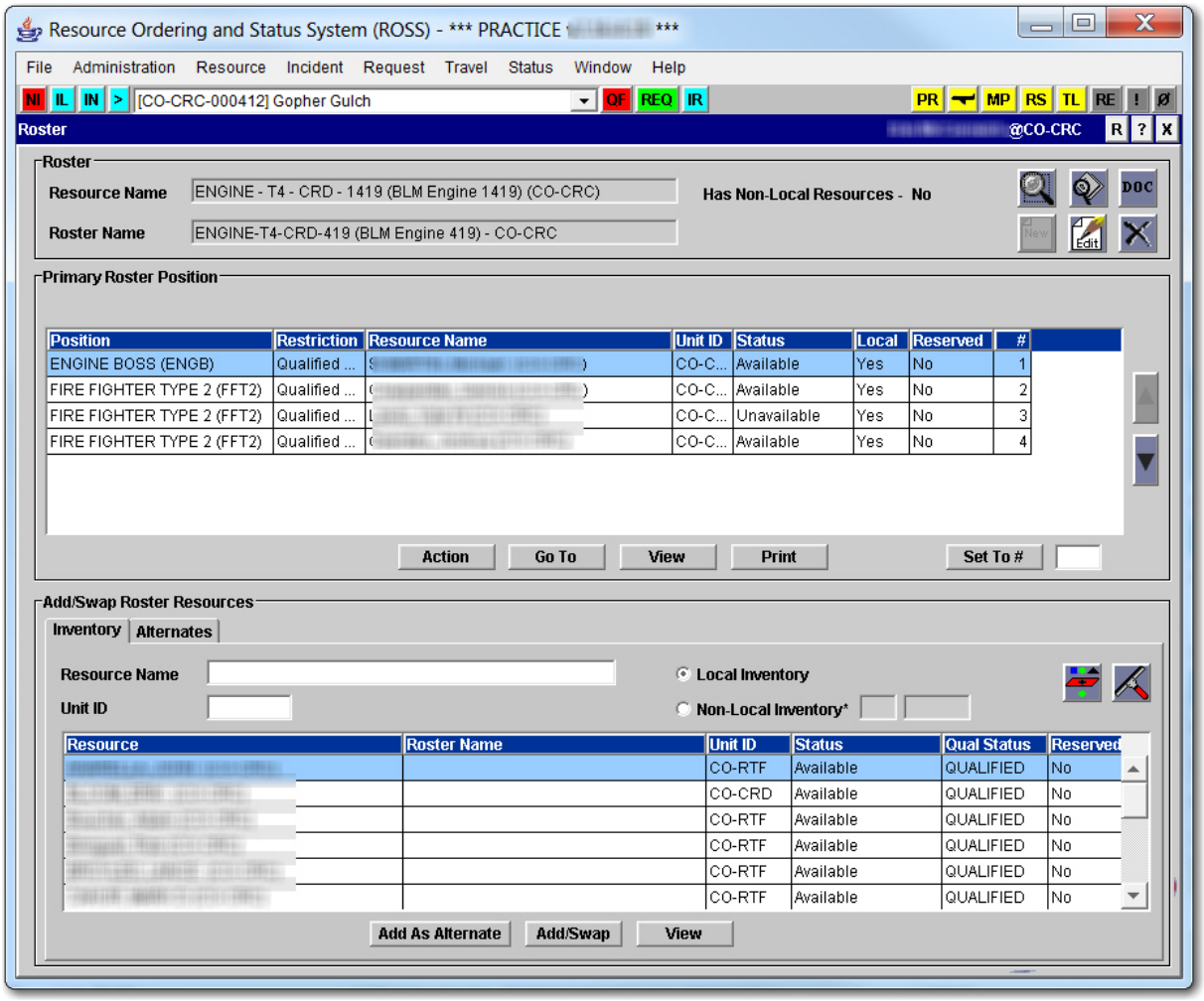
This guide explains how to build a roster and then assign and manage resources for that roster. Topics include:

- Building a master roster and assigning resources
- Managing roster positions and resources
- Viewing resource information
- Printing the roster
- Exploring rosters in detail.

To access the Roster screen

- On the **Resource** menu, click **Roster**.

Roster screen

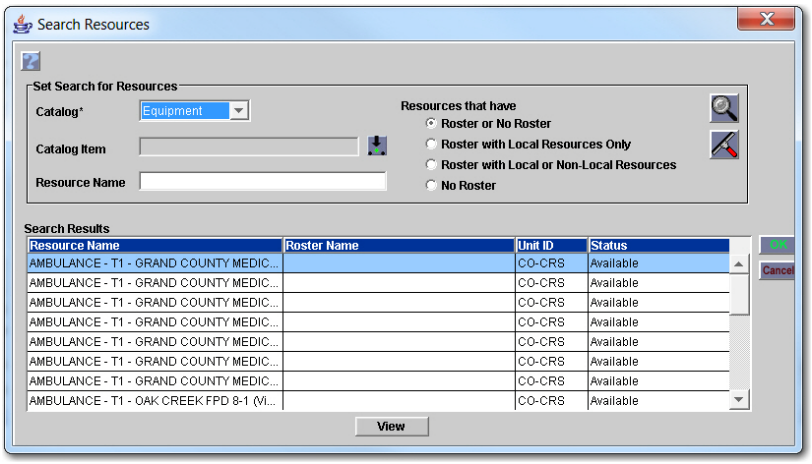


To search for a resource on the Search Resources dialog box

The Search Resources dialog box displays automatically when you initially access the Roster screen.

1. On the **Search Resources** dialog box, click the **Catalog** drop-down arrow, and then select the **Catalog** of your choice.
2. To further narrow your search, type or click information into as many text boxes as possible, and then click **Filter**.
3. Under **Search Results**, click the **Resource Name** of your choice, and then click **OK**.

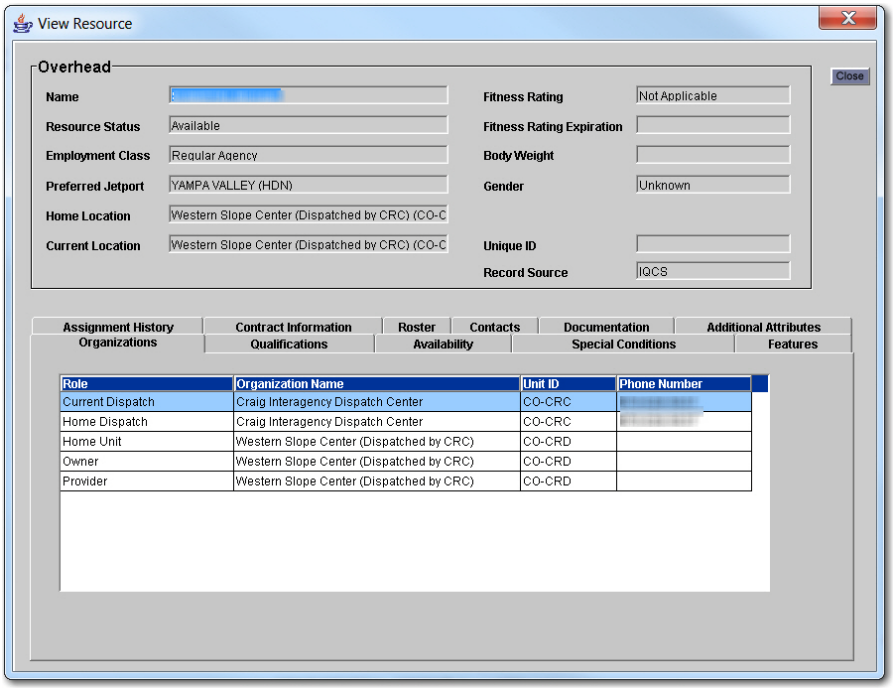
The following graphic shows the Search Resources dialog box.



To view the resource from the Search Resources dialog box

1. On the **Search Resources** dialog box, click the **Resource Name** of your choice, and then click the **View** button.
2. When finished reviewing the resource information, click **Close** on the **View Resource** dialog box.

The following graphic shows the View Resource dialog box.



Building a master roster and assigning resources

This section explains how to build a roster and assign resources using the national standard configuration for a resource. This section also explains how to perform the following:

- review roster details
- add documentation to a roster
- change the name of the roster
- maintain multiple versions of a master roster
- delete a roster.

To create a new roster

You cannot create a roster for a resource that already has one. You must either delete or edit the existing one.

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. On the **Roster** screen, click the **New Roster** button.
3. To change the roster name from the default, on the **New Roster** dialog box, type the **Roster Name** of your choice in the **Roster Name** text box.

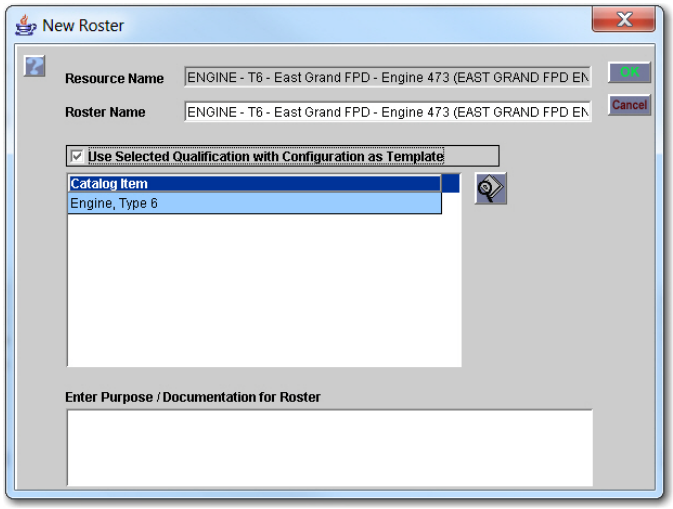
4 To view the default configuration of the roster for that resource, click the **View Configuration** button, and then click **Close** to close the **View Configuration** dialog box.

5 To use the default configuration for the new roster, click the **Use Selected Qualification with Configuration as Template** check box.

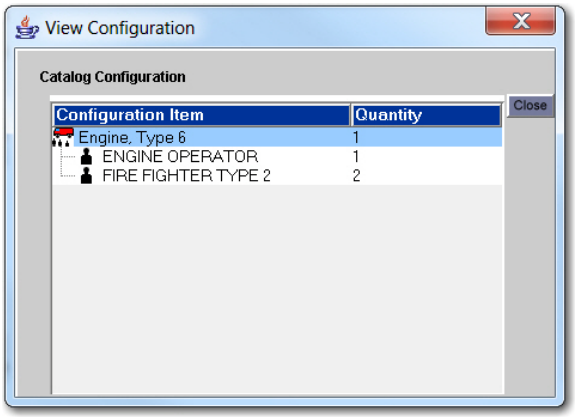
*To build your own local roster with its own qualifications, click to clear the **Use Selected Qualification with Configuration as Template** check box.*

6 When finished completing information on the **New Roster** dialog box, click **OK**, and then click **OK** on the **ROSS Warning Message** dialog box.

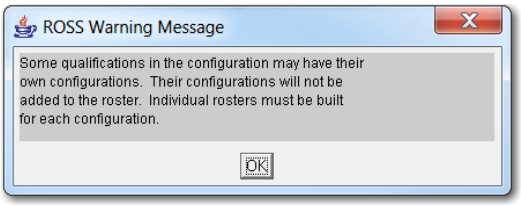
The following graphic shows the New Roster dialog box.



The following graphic shows the View Configuration dialog box.



The following graphic shows the ROSS Warning Message dialog box.



To create multiple versions of the roster you just created see, "To create a multiple version of a master roster."

To assign a resource to a roster position from the ROSS main menu

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. On the **Roster** screen, click the **Position** of your choice.

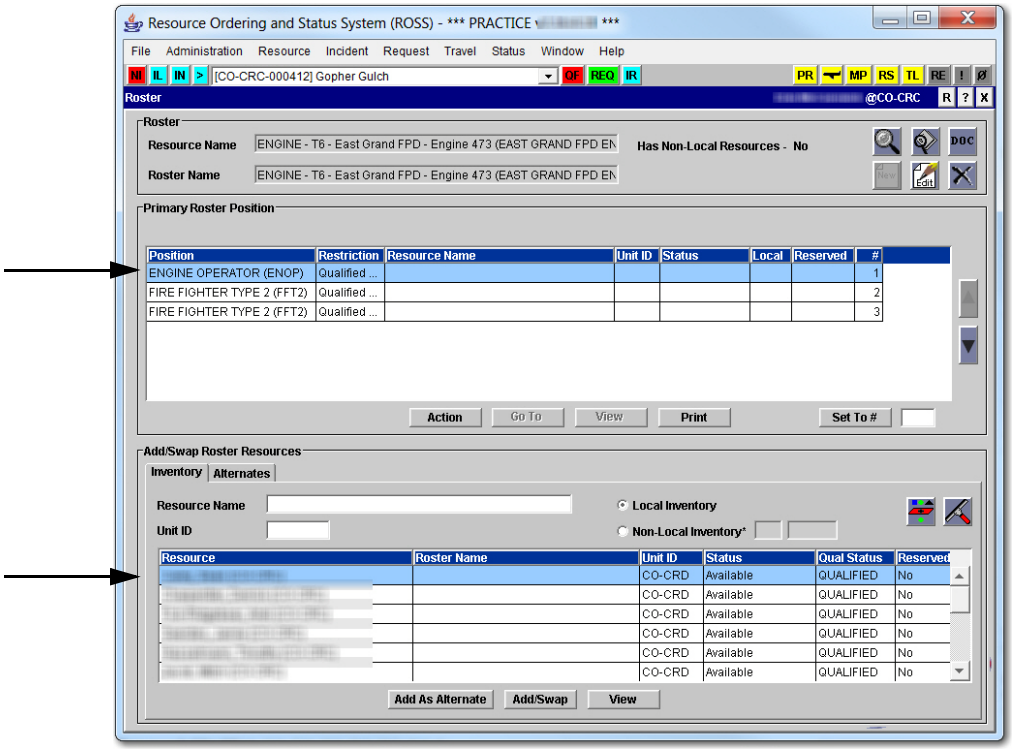
   For roster resources on the Inventory tab, ROSS automatically filters for all resources with that qualification.

4. Under **Add/Swap Roster Resources**, perform one of the following
   - Click the **Inventory** tab, enter filter criteria for **Resource Name**, click the **Filter** button, and then click the **Resource** of your choice.
   - Click the **Alternates** tab, and then click the **Resource** of your choice.

   *To search for local resources, click **Local Inventory**. To search for non-local resources, click **Non-Local Inventory**, enter the **Dispatch Unit Code**, and then click the **Search** button.*

5. Click the **Add/Swap** button.

The following graphic shows a sample local resource available for a Roster position. The arrows point to the Position and the Resource to be added to the Roster.



To add a resource to a roster, its Status does not have to be Available.

To add a resource as an alternate for a roster position

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. On the **Roster** screen, click the **Position** of your choice.
4. On the **Inventory** tab, search for and then click the **Resource** of your choice.
5. Click the **Add As Alternate** button.

Whether the resource is designated as a Primary or Alternate, it will show as an alternate for all other positions of that catalog item on the roster.

To view resource details on a roster

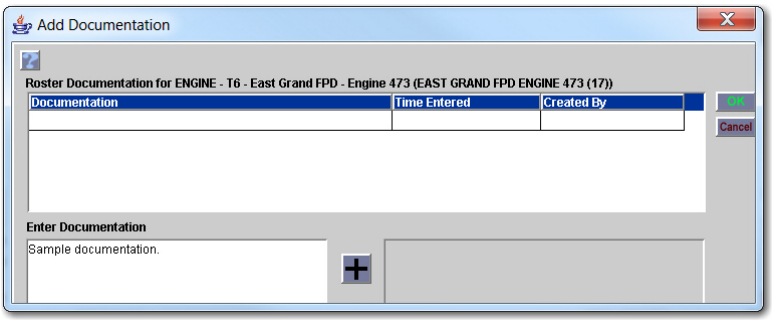
To view information about a specific resource assigned to a roster see, "Viewing resource information."

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. Click the **View Resource** button.
4. When finished reviewing the roster resource, click **Close** on the **View Resource** dialog box.

To add documentation to a roster

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. Click the **Documentation** button.
3. In the **Enter Documentation** text box, type the documentation of your choice, click the **Add Documentation** button, and then click **OK**.

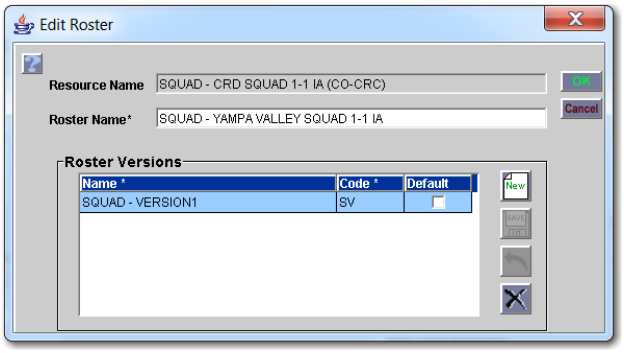
The following graphic shows the Add Documentation dialog box.



To change the name of the roster

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. Click the **Edit Roster** button.
4. In the **Roster Name** text box, type the **new Roster Name**, and then click **OK**.

The following graphic shows the Edit Roster dialog box.



To create multiple versions of a master roster

Multiple versions of a master roster allows you to use a subset of positions from the master roster. For example, you can build versions of a master roster for a crew for a long team and a short team. You can also build a single master roster that has a GACC version and a national version.

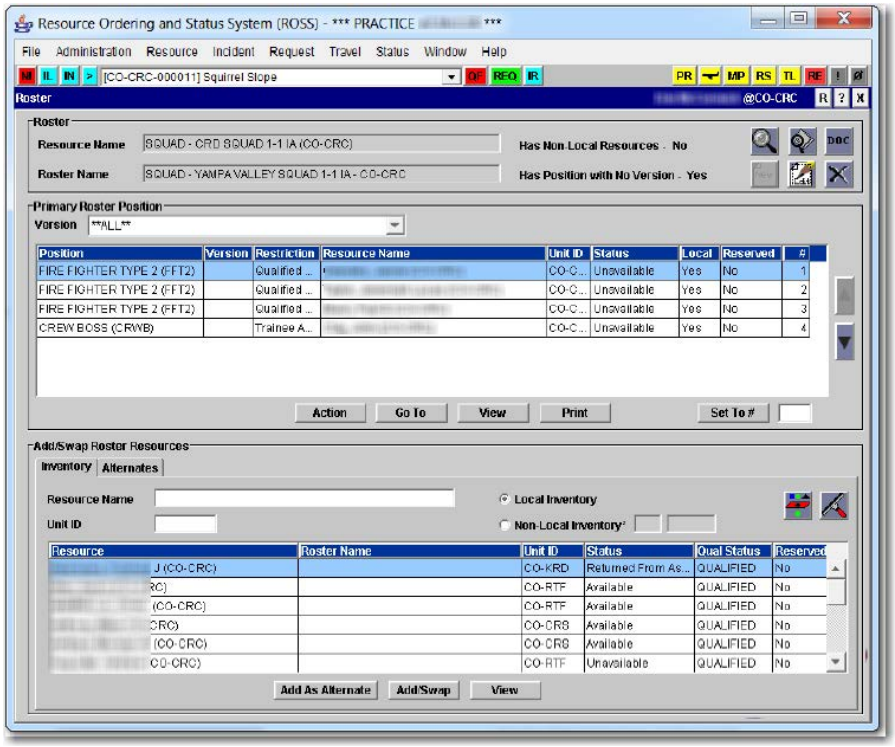
1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. Click the **Edit Roster** button, and then click the **New Roster Version** button.
3. Under **Roster Versions**, type the **Version Name of the Master Roster** in the **Name** text box.

   Use a meaningful name so that the duplicate Roster is easy to identify!

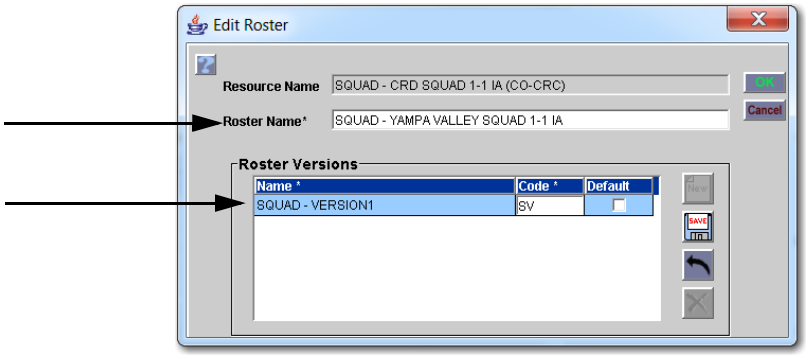
4. Click in the **Code** text box, and then type the **two-character Code for that Version of the Master Roster**.
5. To designate this Roster as the **Default Roster**, click the **Default** check box.
6. To save this roster version, click the **Save** button.
7. Repeat steps 2-6 to create additional versions of the master roster as appropriate, and then click **Close**.

   You can add and delete positions and assign qualified resources to this roster version. For more information see, "To assign positions to a roster version."

The following graphic shows a sample Roster for a Squad in CO-CRC.



The following graphic shows a sample Edit Roster dialog box for creating a multiple version of a Squad in CO-CRC. The arrows point to the existing Roster Name and the Name of the new roster version.

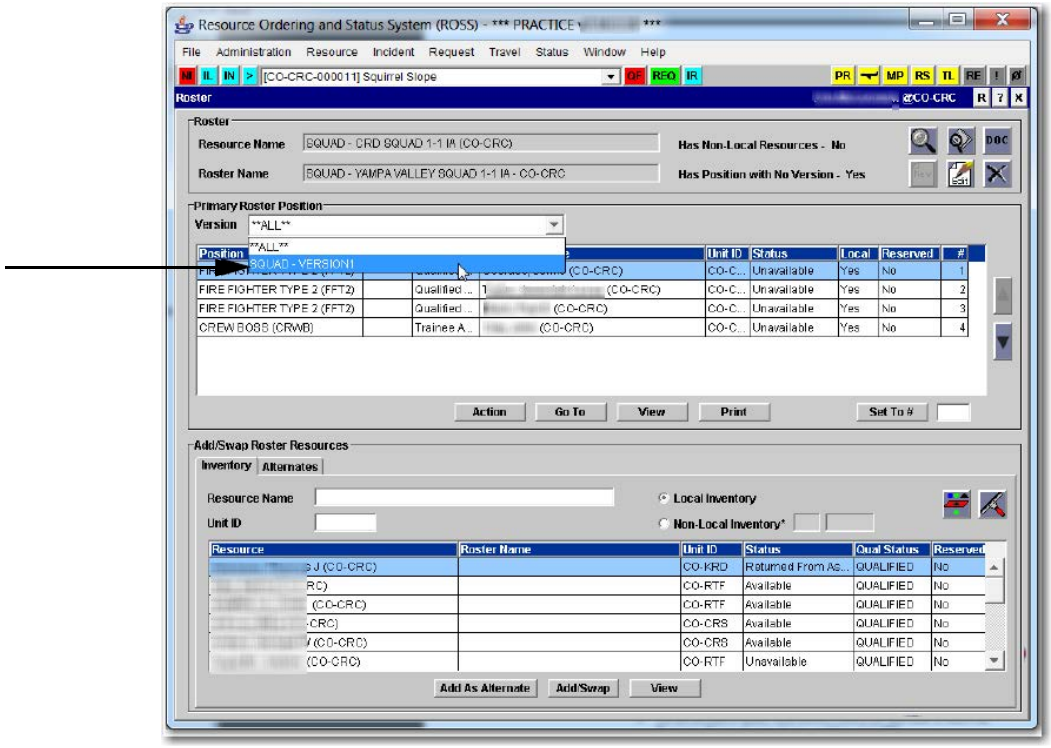


To view a version of a master roster

You can perform this task only if more than one version of a master roster exists.

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. On the **Roster** screen under **Primary Roster Position**, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.

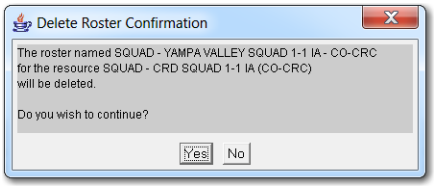
The following graphic shows the Roster screen. The arrow points to the Version drop-down arrow.



To delete a roster

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. Click the **Delete Roster** button.
4. On the **Delete Roster Confirmation** dialog box, click **Yes** to confirm or click **No** to cancel.

The following graphic shows the Delete Roster Confirmation dialog box.



To delete a version of a roster

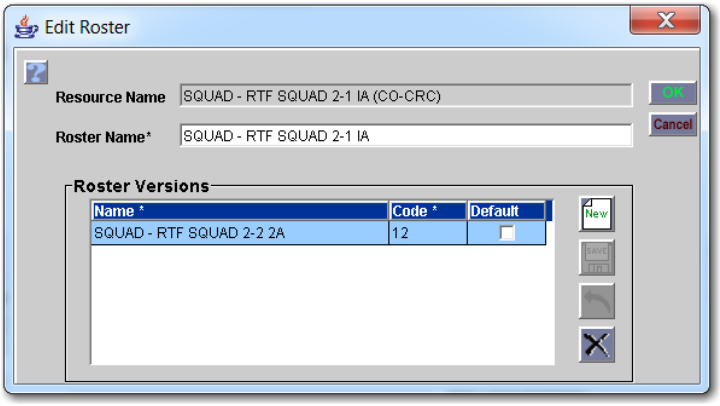
1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.

2 On the **Roster** screen, click the **Version** drop-down arrow, click the **Roster Version** of your choice, and then click the **Edit Roster** button.

3 On the **Edit Roster** dialog box, click the **Roster Version** of your choice, and then click the **Delete Roster Version** button.

4 On the **Confirm Deletion** dialog box, click **Yes** to delete or click **No** to cancel.

The following graphic shows the Edit Roster dialog box for deleting a roster version.



To undo edits to a roster

- On the Edit Roster dialog box, click the **Undo** button.

Managing roster positions and resources

The Action button on the Roster screen allows you to add or delete positions on the roster and manage roster resources. There are two actions that pertain to Overhead resources:

- **Marked as Reserved.** An overhead resource can be marked as reserved on a roster. If that reserved resource is used to fill any request other than the position for which he/she is reserved, ROSS will display a reminder to the dispatcher. You can reserve a resource on more than one roster at a time. However, you can only mark as reserved those resources assigned as primaries to roster positions.
- **Restrictions.** There are currently three restrictions for overhead roster positions, including
  - **Qualified Only.** Allows the dispatcher to assign only a fully qualified person to the position.
  - **Trainee Acceptable.** Allows the dispatcher to assign a fully qualified person or a trainee to the position.
  - **Developmental.** Allows the dispatcher to assign almost any person to the position. *Only the National Data Steward at NICC may mark a*

position as "Developmental," which allows a person with limited qualifications/experience to shadow a fully qualified resource on a team. This exposes that person to the duties and responsibilities of that position, and provides a recruitment opportunity into a trainee path. If the position has not been marked as developmental in the ROSS catalog, it is not an available choice under "Change Restriction."

- **Trainee Required**. Allows the dispatcher to assign only trainees to assignments, for which they need to become fully qualified. For example, a Type I Team is usually deployed with six trainee positions. Using a pre-identified pool of trainees, the dispatch can deploy those six trainees each time the team goes out.

- **Add Roster Versions**. Allows positions to be added or removed from a roster version.

To add a position to a roster

The Add Position option applies only to roster positions that have configurations. You cannot add an alias catalog item. To add or delete a position of all roster versions see, "To assign positions to all roster versions."

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. Click the **Action** button, and then click **Add Position**.
3. On the **Add Roster Position** dialog box, click the **Catalog** drop-down arrow, and then click the **Catalog** of your choice.
4. Click the **Category** drop-down arrow, click the **Category** of your choice, and then click **Filter**.

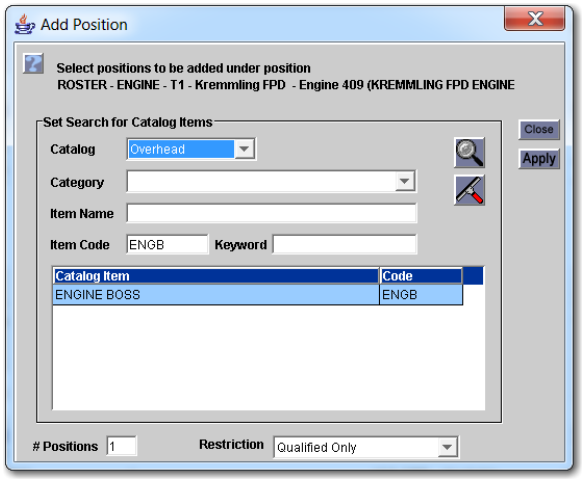
   *To further narrow your search, complete the **Item Name**, **Item Code**, and/or **Keyword** text boxes, and then click **Filter**.*

5. Under **Catalog Item**, click the **Position** of your choice, and then type the **number of positions required** in the **# Positions** text box.

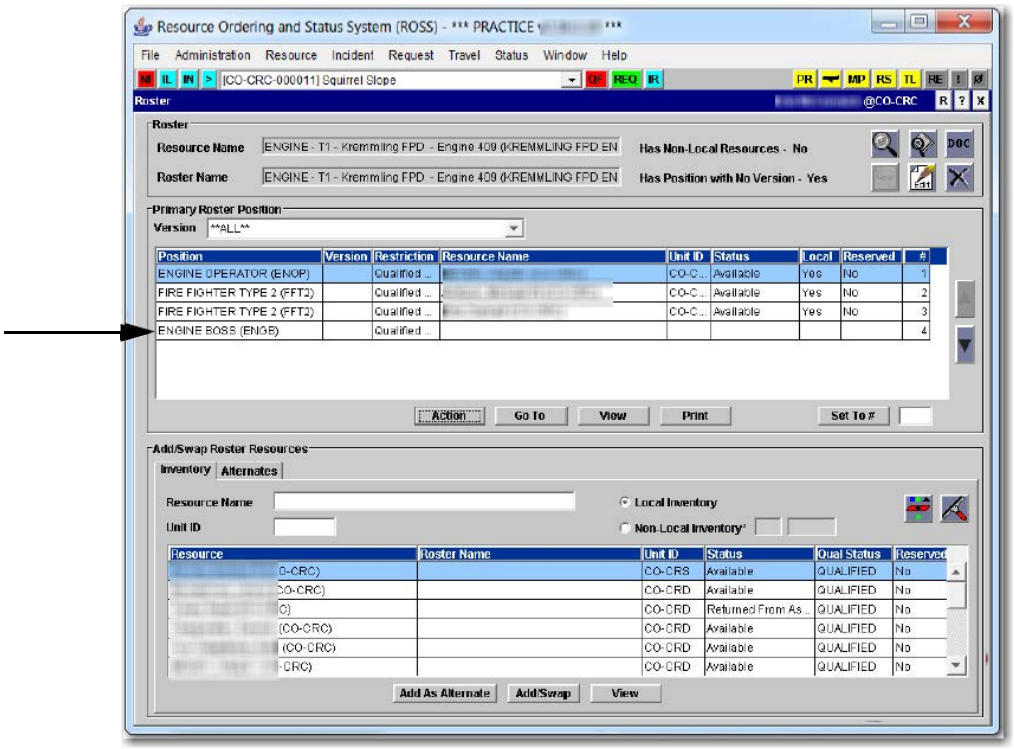
   *For **Overhead** catalog items, click the **Restriction** drop-down arrow and select the **Restriction** of your choice.*

6. When finished completing the **Add Position** dialog box, click **Apply**, and then click **Close**.

The following graphic shows the Add Position dialog box. In this example, one, Qualified-Only Engine Boss position will be added.



The following graphic shows the Primary Roster Position grid on the Roster screen. The arrow points to the new Engine Boss position.



To add positions to all roster versions

1 On the **Resource** menu, click **Roster**, search for and click the **Roster** of your choice, and then click **OK**.

2 On the **Roster** screen, verify that ****ALL**** displays in the **Version** text box.

3 Click the **Action** button, and then click **Assign Roster Versions**.

4 Click the **Positions for Version** drop-down arrow, and then click the **Roster Version** of your choice.

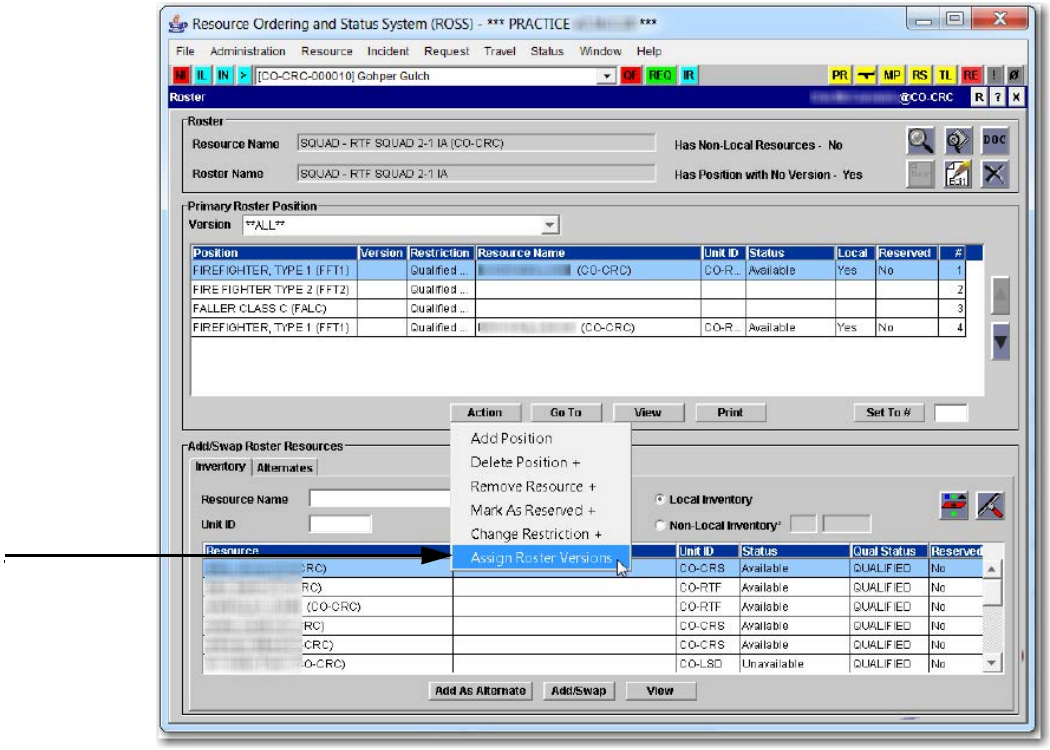
5 Under **Roster Positions**, click the **Position(s)** of your choice, and then click, the **Add Position** button to move them to the right.

These Positions will be added to the Roster Version you selected in step #4.

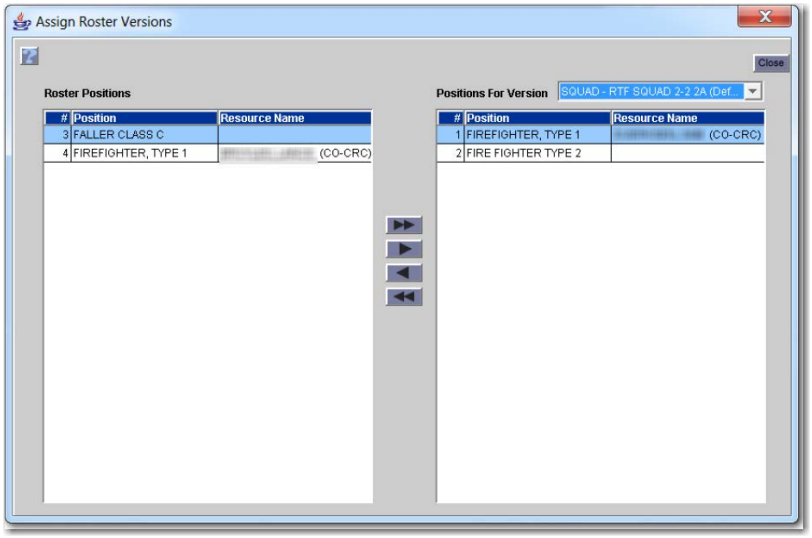
6 To add **Positions** to another **Roster Version**, repeat step #4 and step #.

7 When finished adding **Positions** to the **Roster Versions** of your choice, click the **Close** button on the **Assign Roster Versions** dialog box.

The following graphic shows the Roster screen. The arrow points to the Assign Roster Versions option.



The following graphic shows the Assign Roster Versions dialog box.

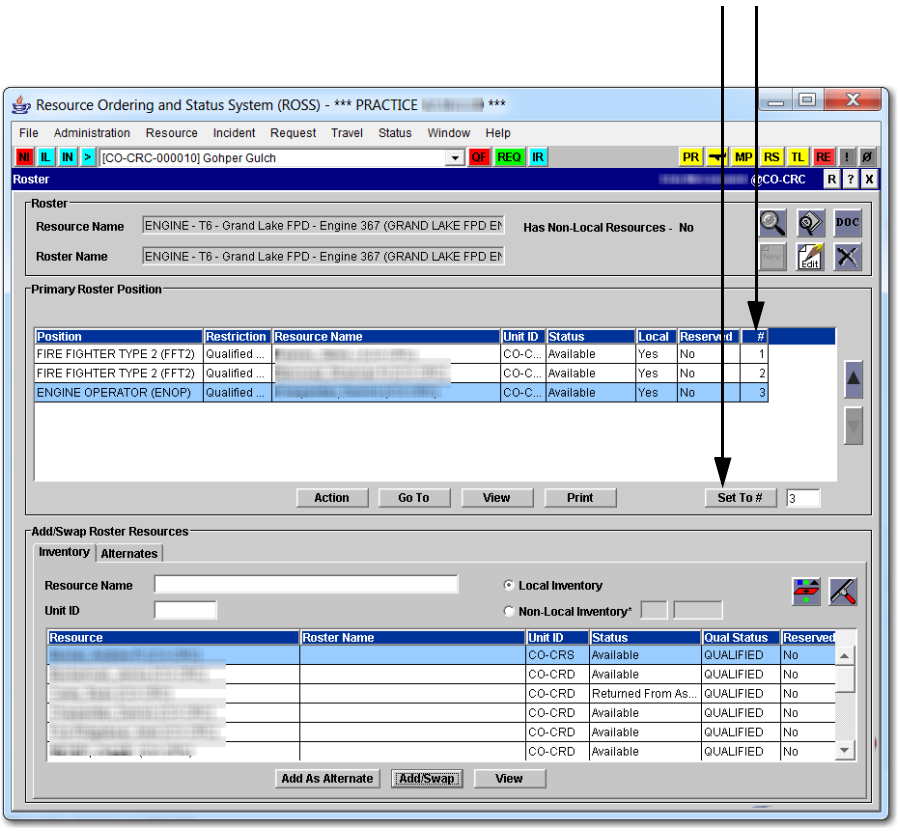


To reorder roster positions

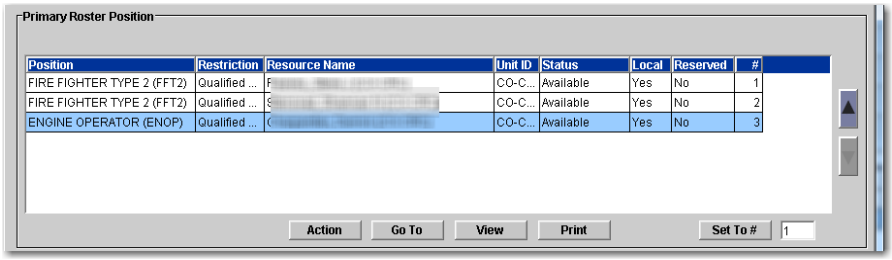
*You can change the order of positions listed in a roster, which allows you to control the order of the subordinate request numbers when the request is filled. For example, if you added the position of Engine Operator **after** adding Type 2 Fire Fighters to a roster for a Type 6 Engine, use the Set To # button to move Engine Operator to Position Number 1. When the request for the Engine is filled, the Engine Operator is filled as the first subordinate request number (E-1.1). The subordinate request numbers for Type 2 Fire Fighters would then be numbered E-1.2 and E-1.3.*

1. On the **Resource** menu, click **Roster**, search for and click the **Roster** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. Under **Primary Roster Position**, review the **Position** and **#** columns. and determine the **Preferred Order of the Roster Positions**.
4. Click the **Position** of your choice, type the **Position Number** for the Preferred Order, and then click the **Set To #** button.
5. Repeat step #4 to reorder the remaining roster positions as appropriate.

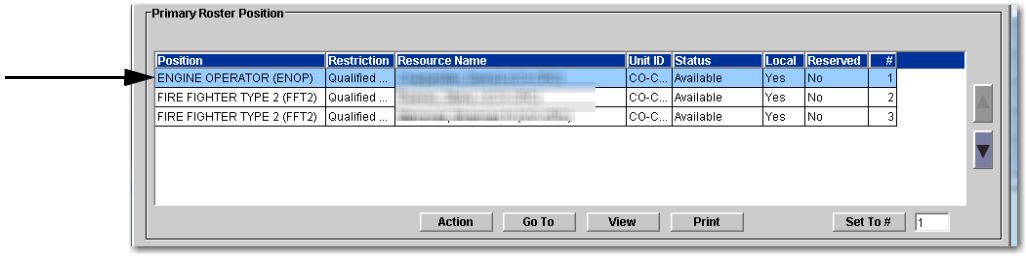
The following graphic shows a sample Roster screen. Here, ENGINE OPERATOR (ENOP) is selected to be reordered on the roster. The arrows point to the # column and the Set To # button.



The following graphic shows the Primary Roster Position grid. In this example, ENGINE OPERATOR (ENOP) is to be moved to Position Number 1.



The following graphic shows the resulting Primary Roster Position grid. The arrow points to the ENGINE OPERATOR (ENOP) moved to Position Number 1.



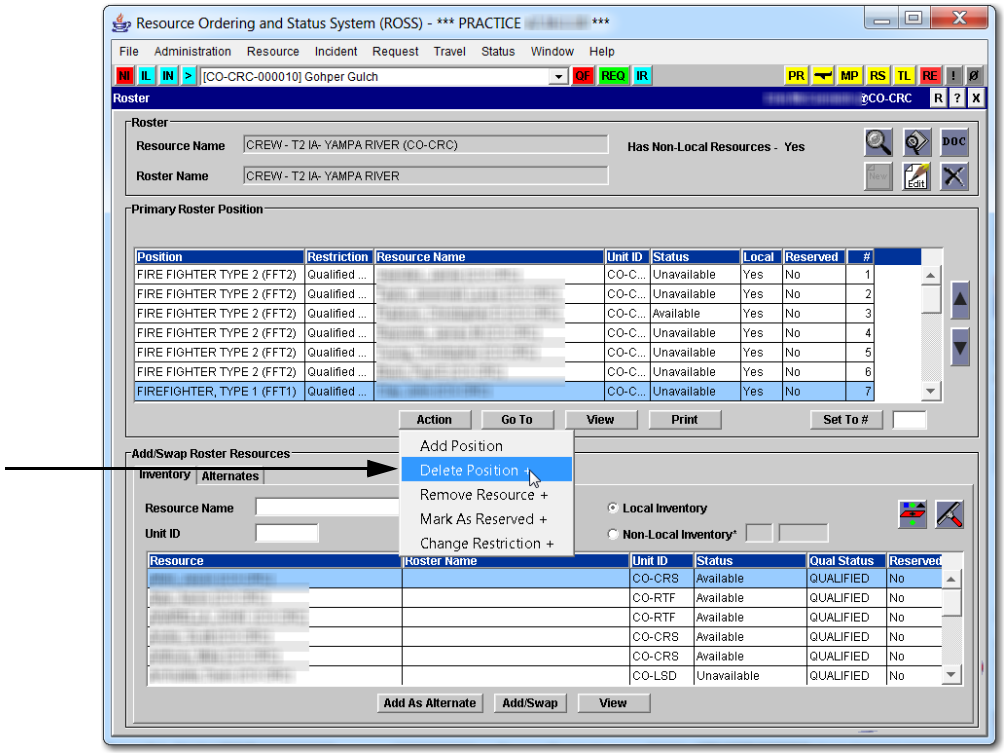
You can also use the Move Position Up and Move Position Down buttons to move roster positions.

To delete a position from the roster

You cannot delete the root position of a roster. If you delete the parent of a configuration, you will also delete all the child positions.

1. On the **Resource** menu, click **Roster**, search for and click the **Roster** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. Under **Primary Roster Position**, click the **Position** of your choice.
4. Click the **Action** button, and then click **Delete Position**.
5. On the **Delete Position Confirmation** dialog box, click **Yes** to confirm or click **No** to cancel.
6. On the **Edit Roster** dialog box, click **OK**.

The following graphic shows the Roster screen and a select Primary Roster Position. The arrow points to the Delete Position option.



To assign a qualified resource to a position on a roster

1. On the **Resource** menu, click **Roster**, search for and click the **Roster** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. On the **Roster** screen, click the **Position** of your choice.
4. To assign a local inventory item, on the **Inventory** tab, click the **Resource** of your choice, and then click the **Add/Swap** button.
5. To search for a non-local inventory item, under **Add/Swap Roster Resources**, click **Non-Local Inventory**, type the **non-local inventory ID**, and then click the **Search** button. Click to select the **Resource** of your choice, and then click the **Add/Swap** button.

If the resource is not yet assigned to the roster position, ROSS assigns that resource and adds it as an alternate for all other positions of that catalog item on the roster. If another resource is already assigned to the selected roster position, ROSS swaps out the assigned resource with the selected resource. The swapped out resource is added as an alternate for all other positions of that catalog item on the roster.

To assign a qualified resource as an alternate to a position on the roster

1. On the **Resource** menu, click **Roster**, search for and click the **Roster** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. On the **Roster** screen, click the **Position** of your choice.
4. On the **Inventory** tab, click the **Resource** of your choice, and then click the **Add As Alternate** button.

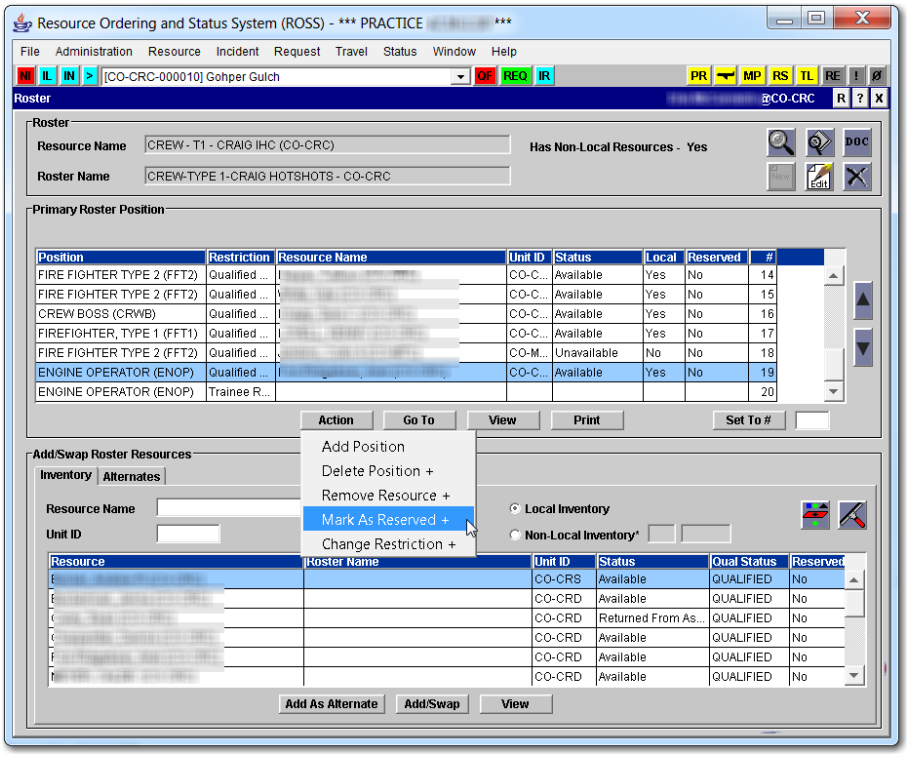
   The alternate resource is automatically added as an alternate for all other positions of that catalog item on the roster.

To reserve a resource for a position on the roster

Remember, marking a resource as "reserved" applies only to an Overhead resource assigned to a position.

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. On the **Roster** screen, click the **Assigned Position** of your choice, click the **Action** button, and then click **Mark As Reserved**.

The following graphic shows the Primary Roster Position grid on the Roster screen. The arrow points to the Reserved status of resource in an Engine Operator (ENOP) position.



To clear a reserved resource from the roster

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. Under **Primary Roster Position**, click the reserved **Position** of your choice.
4. Click the **Action** button, and then click **Clear Reserved**.

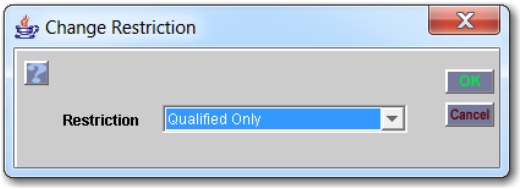
To change a resource restriction

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. Under **Primary Roster Position**, click the **Position** of your choice.
4. Click the **Action** button, and then click **Change Restriction**.

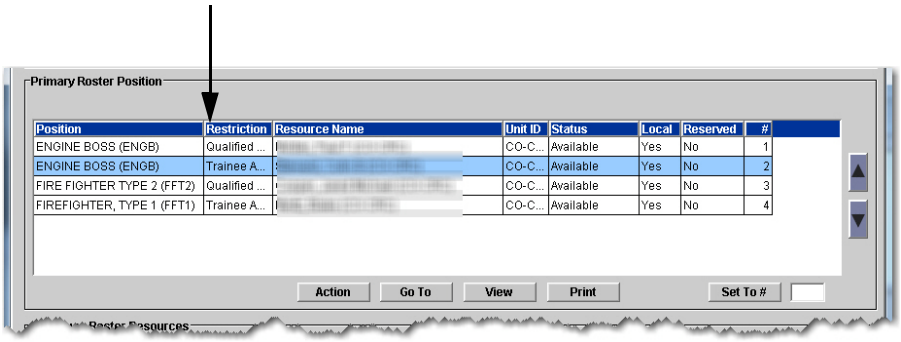
5 On the **Change Restriction** dialog box, click the **Restriction** drop-down arrow, click the **Restriction** of your choice, and then click **OK**.

*For example, if you change a position that has a restriction of "Trainee Acceptable" to a "Qualified Only" restriction, but it already has a trainee resource attached to it, the following warning message displays, "There are some roster item positions that cannot be qualified only due to the primary resource that is currently assigned." To continue and remove all valid primary resources from the positions, click **OK** or click **Cancel**.*

The following graphic shows the Change Restriction dialog box.



The following graphic shows the Primary Roster Position grid. The arrow points to the Restriction column, which shows the qualification requirements for each position.



To remove a resource from the roster

1 On the **Resource** menu, click **Roster**, search for and click the **Roster** of your choice, and then click **OK**.

2 If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.

3 Under **Primary Roster Position**, click the **Position** of your choice.

4 Click the **Action** button, and then click **Remove Resource**.

5 On the **Remove Resource(s) Confirmation** dialog box, click **Yes** to confirm or click **No** to cancel.

To remove a resource as an alternate to a roster position

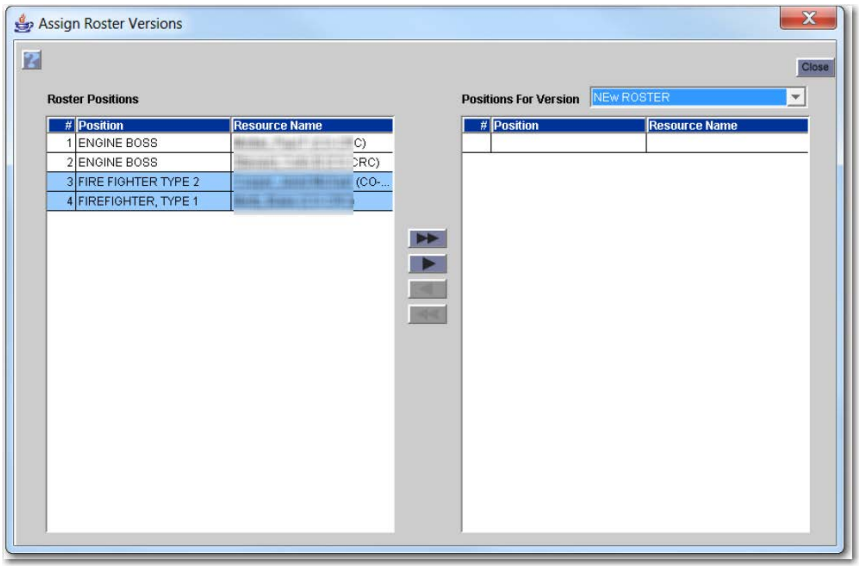
When you remove a resource as an alternate, it is also removed as an alternate for all other positions of that catalog item on the roster.

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. Under **Primary Roster Position**, click the **Position** of your choice.
4. Under **Add/Swap Roster Resources**, click the **Alternates** tab.
5. Click to select the **Resource** of your choice, and then click the **Remove** button.

To assign positions to a roster version

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. Click the **Action** button, and then click **Assign Roster Versions**.
3. On the **Assign Roster Versions** dialog box, click the **Positions For Version** drop-down arrow, and then click the **Version** of your choice.
4. Under **Roster Positions**, click the **Position(s)** of your choice, and then click the **Add All Positions** or **Add Positions** button as appropriate.
5. When finished, click the **Close** button.

The following graphic shows the Assign Roster Versions dialog box.



Viewing resource information

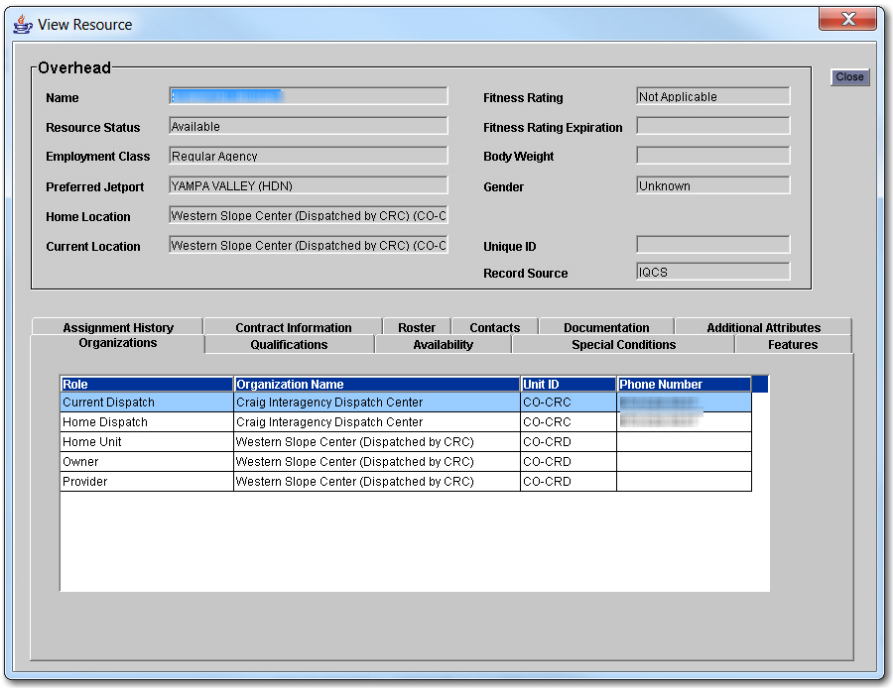
The View button allows you to view specific information about positions and assigned resources of the roster of your choice, including:

- General resource information
- Resource home unit information, which applies only to positions that have a resource assigned
- Roster position configurations, which applies only to positions for catalog items that have a configuration
- Roster resources committed to an Incident, which applies only to positions that have a resource assigned or if the resource is presently assigned to an Incident.

To view a resource assigned to a roster position

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. On the **Roster** screen, click the **Position** of your choice, click the **View** button, and then click **View Resource**.
4. When finished reviewing the resource information, click **Close** on the **View Resource** dialog box.

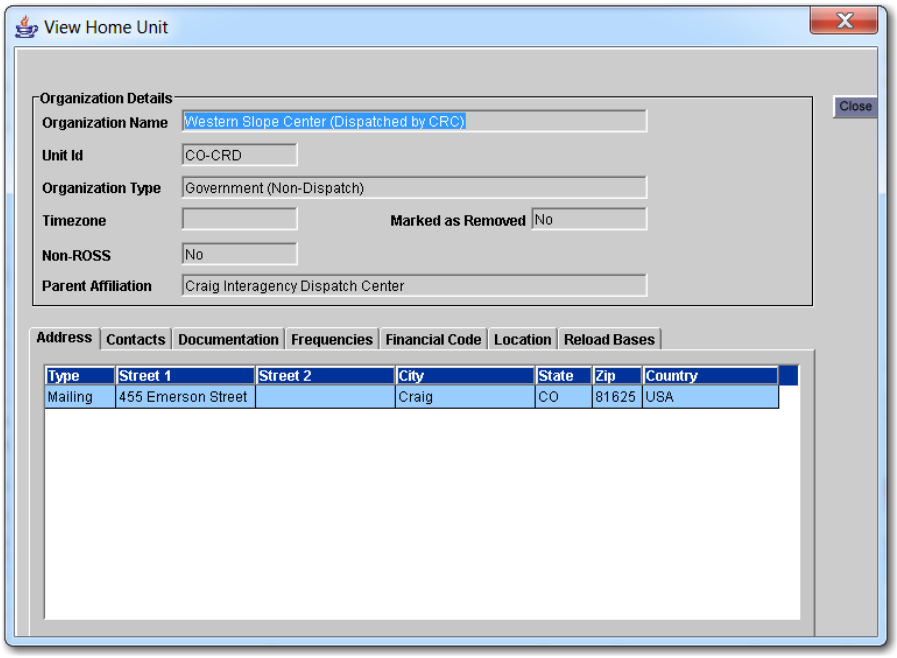
The following graphic shows the View Resource dialog box for viewing information about an Overhead resource.



To view the home unit of a roster resource

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. On the **Roster** screen, click the **Position** of your choice, click the **View** button, and then click **View Home Unit**.
4. When finished reviewing the resource information, click **Close** on the **View Resource** dialog box.

The following graphic shows the View Home Unit dialog box.



To view the configuration of a roster position

This task applies to nested rosters, such as a Strike Team.

1. On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.
2. If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.
3. On the **Roster** screen, click the **Position** of your choice, click the **View** button, and then click **View Configuration**.
4. When finished reviewing the position or configuration information, click **Close** on the **View Configuration** dialog box.

To view the Incident of an assigned roster resource

1 On the **Resource** menu, click **Roster**, search for and click the **Resource Name** of your choice, and then click **OK**.

2 If this roster has multiple versions, click the **Version** drop-down arrow, and then click the **Roster Version** of your choice.On the **Roster** screen, click the **Position** of your choice, click the **View** button, and then click **View Incident**.

3 When finished reviewing the Incident information, click **Close** on the **View Incident** dialog box.

Printing the roster

The Print button allows you to print a hardcopy of the roster using Cognos. The report is generated in pdf format.

To print a roster

1 On the **Resource** menu, click **Roster**, search for and click the **Roster** of your choice, and then click and then click the **Print** button.

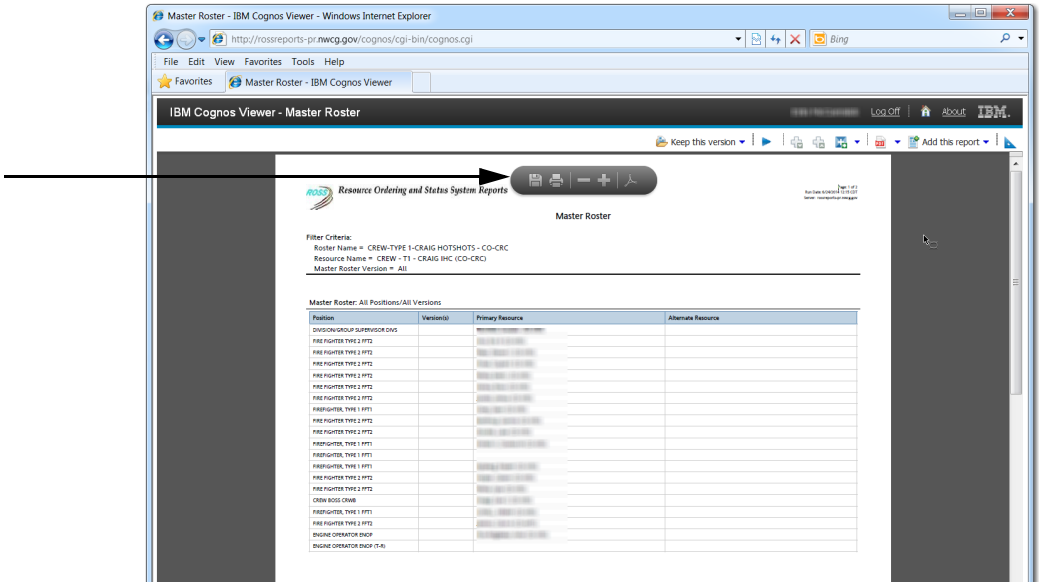
2 In **ROSS Reports**, position your mouse toward the top of the web page, and then click the **Print file** button or pres **[Ctrl] + P**.

*You may choose to hover your pointer to display the **PDF floating toolbar**, and then click the **Print** button.*

3 On the **Print** dialog box, review the printer settings and then click **OK**.

4 When finished, close your Internet browser.

The following graphic shows a sample roster in PDF format. The arrow points to the location of the Print file button.



Exploring rosters in detail

This section identifies additional topics that relate to rosters and using the Roster screen. Topics include:

- Understanding rosters and configurations
- Understanding the Search Resources dialog box.

Understanding rosters and configurations

A roster is a list of positions and resources assigned to a catalog item that has a configuration. You can maintain multiple versions of a master roster, control the order of a roster and assignment roster positions, and manage alternate roster positions.

There are two types of rosters in ROSS:

- **Master roster**. Create a master roster ahead of time for resources with dedicated personnel, such as Type 1 crews, overhead teams, and exclusive-use helicopters, to expedite the assigning of that resource to an incident request.
- **Assignment roster**. Create an assignment roster when filling a pending request or quick filling a request that has a configuration. The resource request has assigned positions, but does not have dedicated personnel assigned to those positions. The Assignment Roster dialog box also appears when one or more master roster positions are not filled with an available resource.

Configurations are established in the ROSS catalog. The NICC catalog manager is the only person who can access, create, and modify the ROSS catalog.

You can create rosters for aircraft, crews, equipment, or overhead resources. You cannot create a roster for supply or services items.

For more information about working with assignment rosters see, “Understanding assignment rosters,” in “Pending Request - managing requests for resources.”

Remember these key points when building a roster and assigning resources:

- A resource can have one roster, or versions of that roster, added to it.
- A resource can have a roster and be on a roster for another catalog item.
- A resource can be on several different rosters.
- A resource can only be designated to one position on a roster.
- A resource can be an “Alternate” on many positions on a roster.

- A resource can be designated as “Primary” on a roster and can still be an alternate on many other positions on that same roster.
- A resource can be designated as “Reserved” on more than one roster at the same time.
- You can not create and/or maintain master rosters for resources that are on a CWN or agreement contracts.
- Some qualifications in the configuration may have their own configuration. For example, a strike team of engines is a configuration made up of 1 strike team leader and 5 engines of the same type. Each engine may have its own configuration of 1 engine and 3 to 5 overhead resources. This configuration will not be added to the strike team roster until the engine is added to the strike team roster. Since the engine has its own configuration, you must build individual rosters for each engine.
- Whether using the selected qualification with configuration template or building your roster from scratch, you can add or delete positions from the configuration for the resource type.
- Some resources have multiple qualifications. All group qualifications display on the New Roster dialog box for that resource. When creating a new roster, highlight the primary qualification type for that resource. For example, you could highlight “Lead Plane” to designate the “Primary” qualification type of a fixed wing aircraft.

Understanding the Search Resources dialog box

The Search Resources dialog box allows you to display the following roster options:

- **Roster or No Roster**. Displays any local resource under the selected catalog that has a roster or does not have a roster. Only catalog items that have been identified as having a “Group of Items” in the ROSS catalog, will display here.
- **Roster with Local Resources**. Displays only those local resources that have a roster. If the roster has any non-local resources on it, it will not display here.
- **Roster with Local or Non-Local Resources**. Displays all local resources that have a roster with local and/or non-local resources on the roster.
- **No Roster**. Displays only local resources that have no roster.