Travel - setting up resource travel

This guide explains how to create and edit itineraries for mobilization and demobilization of resources. Topics include:

- Filtering for incidents and requests
- Changing the travel status of a resource
- Setting ETD/ETA or ATD/ETE for a resource
- Creating or editing a travel itinerary for a resource
- Picking travel locations
- Viewing and printing travel itinerary information
- Exploring travel itineraries in detail.

To access the Travel screen
- On the Travel menu, click Travel, or click the TL button.

Travel screen
Filtering for incidents and requests

This section explains how to customize the incidents and requests that display on the Travel screen.

**To search for and select an incident on the Travel screen**

1. On the Travel screen under Select Incident(s), click the Add Incident button.

2. On the Search Incidents dialog box, under the Set Search for Incidents section, click the Incident Type(s) of your choice.

3. To filter for specific Incident Type(s) and narrow your search, click the check boxes of your choice.

   - Local Incidents
   - Non-Local Incidents
   - Local Resources Returning Home
   - External Incidents Only
   - Show Closed Incidents
   - Exclude Closed Requests.

4. Complete the Incident Name and Incident # text boxes as appropriate to narrow your search, and then click the Search button.

   *You can use the asterisk (*) to perform a wildcard search.*

5. Under Select Incident(s), click the Incident Name of your choice, click Apply, and then click Close.

   *To select more than one incident at a time, press and hold CTRL, and then click the Incident Names of your choice.*
The following graphic shows the Search Incidents dialog box.

To include closed incidents in your search
1. On the Travel screen under Select Incident(s), click the Add Incident button.
2. On the Search Incidents dialog box under Incident Type(s), click the Incident Type(s) of your choice.
3. Click to select the Show Closed Incidents check box.
4. Complete the Incident Name and Incident # text boxes as appropriate to narrow your search, and then click the Search button.

The following graphic shows the Search Incidents dialog box. The arrow points to the Show Closed Incidents check box.
To include closed requests in your search

1. On the Travel screen under Select Incident(s), click the Add Incident button.

2. On the Search Incidents dialog box under Incident Type(s), click to clear the Exclude Closed Requests check box.

3. Complete the Incident Name and Incident # text boxes as appropriate to narrow your search, and then click the Search button.

To delete an incident from the Travel screen

- On the Travel screen under Select Incident(s), click the Incident(s) of your choice, and then click the Remove Incident button.

To filter for mobilization or demobilization travel within a specific date range

1. On the Travel screen under Select Incident(s), click the Incident(s) of your choice.

2. Under Select Filter for Incident Resource(s), click one of the following
   - Mobilization
   - Demobilization.

   To show closed demobilization requests, click the Show Closed Requests check box.

3. Click the Select Dates button, and then click the From and To Range of Dates of your choice.

4. To select a specific travel status, click the Travel Option drop-down arrow, and then click the Travel Status of your choice
   - **All**
   - Travel to be Arranged (TBA)
   - Travel ETD/ETA (ETD/ETA)
   - Travel ATD/ETE (ATD/ETE)
   - Travel Itinerary (ITIN)
   - No Travel (NT)

5. Click the Filter button.
The following graphic shows the Travel screen. The arrow points to the dates used to filter for demobilization travel.

To filter for a combination of multiple, individual requests and a range of requests within a catalog

Enter all filter criteria correctly! Partial results do not display.

1 On the Search Incidents dialog box, search for and then click the Incident Name(s) of your choice.

2 In the Select Filter for Individual Resources section, click the radio button next to Request #.

3 In the Request # drop down menu, select the Catalog Abbreviation of your request.

4 In the next text box, perform one or more of the following and then click the Filter button
   - to filter for multiple individual request numbers, type each request number, separated by a comma (,)
   - to filter for a range of request numbers, type the first and last request number, separated by a dash (-).

Spaces are automatically trimmed from the filter criteria.
The following graphic shows the Travel screen for displaying multiple request numbers. The arrows point to the Request # text boxes and the resulting Req # column.

To filter for and view incident resources with a specific travel status

Resources for untracked supply or services requests do not display on the Travel screen.

1. On the Travel screen under Set Filter for Incident Resources, click one of the following options
   - Mobilization
   - Demobilization.

2. To select a specific travel status, click the Travel Option drop-down arrow, and then click the Travel Status of your choice
   - **All**
   - Travel to be Arranged (TBA)
   - Travel ETD/ETA (ETD/ETA)
   - Travel ATD/ETE (ATD/ETE)
   - Travel Itinerary (ITIN)
   - No Travel (NT)

3. Click the Filter button.
The following graphic shows a sample Travel screen for displaying Travel ETD/ETA travel. The arrow points to the Travel Option drop-down arrow.

To filter incident resources by catalog/category, resource name, or request number

1. Click the Incident and Incident Resource Travel Status of your choice.
2. Under Select Incident Resources, click the Filter button.
3. On the Set Filter For Incident Resources dialog box, perform one of the following
   - to display one or more Catalog/Catalog Category combinations, click one or more Catalog/Catalog Category combinations, and then click the Filter button
   - to display a specific resource, click Set Resource Name Filter, type the Resource Name in the Resource Name text box, and then click the Filter button
   - to display a specific request, click Select Specific Request, click the Incident drop-down arrow and select the Incident of your choice, click the Request # drop-down arrow and select the Catalog of your choice.
To filter for released requests

1. On the Travel screen under Set Filter for Incident Resources, click Mobilization, and then click the Show Released Requests check box.
2. Click the Travel Option drop-down arrow, click the Travel Option of your choice, and then click the Filter button.

The following graphic shows the Set Filter for Incident Resources portion on the Travel screen. The arrow points to the Show Released Requests check box, which displays when the Mobilization option is selected.

To filter for closed requests

1. On the Travel screen under Set Filter for Incident Resources, click Demobilization, and then click the Show Closed Requests check box.
2. Click the Travel Option drop-down arrow, click the Travel Option of your choice, and then click the Filter button.

The following graphic shows the Set Filter for Incident Resources portion of the Travel screen. The arrow points to the Show Closed Requests check box, which displays when the Demobilization option is selected.
Changing the travel status of a resource

This section explains how to change the current travel status of a resource. Remember these key points:

- **Set No Travel.** You cannot select this option in the following situations
  - assigning tactical aircraft to a pending request
  - releasing tactical aircraft
  - mobilizing resources to non-local incidents
  - demobilizing non-local resources.

- **Set Travel Itinerary.** Change the travel status of a resource so that you can later create a travel itinerary.

- **Set/Unset Itinerary Complete.** Change the travel status of a resource to complete/incomplete.

**To set no travel for a resource**

1. On the Travel screen, search for and then select the Incident Name(s) of your choice.
2. Under Set Filter for Incident Resources, click one of the following and then click the Filter button
   - Mobilization
   - Demobilization.
3. Click one or more Resource Name(s) of your choice, click the Action button, and then click Set No Travel.
4. On the ROSS Confirmation Message dialog box, click Yes to confirm or click No to cancel.
The following graphic shows the Travel screen. The arrow points to the Set No Travel option on the Action button menu.

To set a travel itinerary for a resource

1. On the Travel screen, search for and then select the Incident Name(s) of your choice.

2. Under Set Filter for Incident Resources, click one of the following and then click the Filter button
   - Mobilization
   - Demobilization.

3. Click one or more Resource Name(s) of your choice, click the Action button, and then click Set Travel Itinerary.

4. For resources with rosters, click Yes to apply the change in travel status to all resources on the roster, or click No to change only the parent resource’s travel.

To set or unset a travel itinerary as complete

1. On the Travel screen, click the Resource Name(s) of your choice.

2. Click the Action button, and then click Set/Unset Itinerary Complete.
Setting ETD/ETA or ATD/ETE for a resource

This section explains how to set travel for resources that have no travel itineraries, including how to:

- set the estimated time of departure and estimated time of arrival (ETD/ETA)
- set the actual time of departure and estimated time en route (ATD/ETE).

To set travel ETD/ETA
1. On the Travel screen, search for and then select the Incident Name(s) of your choice.
2. Under Set Filter for Incident Resources, click one of the following and then click the Filter button
   - Mobilization
   - Demobilization.
3. Click one or more Resource Name(s) of your choice, click the Action button, and then click Set Travel ETD/ETA.
4. On the Set Travel ETD/ETA dialog box, click the Choose Dates button, and then click the ETD and ETA dates and times.
5. In the Mode of Travel text box, type the Mode of Travel for the resource.
   You can type up to 50 characters in the Mode of Travel text box.

The following graphic shows the Set Travel ETD/ETA dialog box.

To set travel ATD/ETE
1. On the Travel screen, search for and then select the Incident Name(s) of your choice.
2. Under Set Filter for Incident Resources, click one of the following and then click the Filter button
   - Mobilization
   - Demobilization.
3. Click one or more Resource Name(s) of your choice, click the Action button, and then click Set Travel ATD/ETE.
4 On the Set Travel ATD/ETE dialog box, click the Choose Dates button, and then click the ATD of your choice.

5 In the ETE text boxes, type the Estimated Hours and Minutes Enroute to the destination.

6 In the Travel Remarks text box, type any pertinent remarks for the travel, and then click OK.

7 For resources with rosters, click Yes to apply travel to all resources on the roster, or click No to set only the parent resource’s travel.

The following graphic shows the Set Travel ATD/ETE dialog box.

Creating or editing a travel itinerary for a resource

This section explains how to create and/or a travel itinerary to document a resource’s travel to or from its home location.

To create a travel itinerary

1 On the Travel screen, search for and then select the Incident Name(s) of your choice.

2 Under Set Filter for Incident Resources, click one of the following and then click the Filter button
   - Mobilization
   - Demobilization.

3 Click one or more Resource Name(s) of your choice, click the Action button, and then click Create/Edit Travel Itinerary.

4 For resources with rosters, click Yes to apply travel to all resources on the roster, or click No to set only the parent resource’s travel.

5 On the Create/Edit Travel Itinerary dialog box, click the New button.

6 Under Travel Itinerary Leg, complete the following text boxes
   - Travel Mode
   - Type
   - Transportation Description.

7 Click the Choose Dates button, and then select the Departure Date/Time and the Destination Date/Time.

8 Click the Pick Departure /Arrival Location button.
9 On the Travel Leg Locations dialog box, click the Departure Location from the Airports, Other Locations, Organizations, Incidents, or Travel Locations tab, and then click Apply.

See, “Picking travel locations.”

10 Click the Destination Location, click Apply, and then click OK.

11 To add another leg to the itinerary, click the Save button, then click the Next Leg button.

12 When finished completing the travel itinerary, click the Set Itinerary Complete button.

The following graphic shows the Create/Edit Travel Itinerary dialog box.

To add a travel leg to an existing travel itinerary

1 On the Travel screen, Select Incident(s) and Set Filter for Incident Resources, and then click the Resource Name(s) of your choice.

2 Click the Action button, and then click Create/Edit Travel Itinerary.

3 On the Create/Edit Travel Itinerary dialog box, click the New button.

4 Under Travel Itinerary Leg, complete the following text boxes

   - Travel Mode
   - Type
   - Transportation Description
   - Departure Location and Date/Time
   - Destination Location and Date/Time.

5 To add another leg to the itinerary, click Save, click the Next Leg button, and enter the required information.

6 When finished completing the travel itinerary, click the Set Itinerary Complete button (screen will automatically close).
To delete a travel leg from an existing travel itinerary
1. On the Travel screen, Select Incident(s) and Set Filter for Incident Resources, and then click the Resource Name(s) of your choice.
2. Click the Action button, and then click Create/Edit Travel Itinerary.
3. On the Create/Edit Travel Itinerary dialog box, click the Travel Leg you want to delete, and then click the Delete button.
4. Click Close to close the Create/Edit Travel Itinerary dialog box.

To copy and paste a travel leg from one travel itinerary to another
1. On the Travel screen, click the Resource Name having the Travel Leg you want to copy.
2. Click the Action button, and then click Create/Edit Travel Itinerary.
3. On the Create/Edit Travel Itinerary dialog box, click the Travel Leg you want to copy.
4. Click the Action button, click Copy Legs, and then click Close to return to the Travel screen.
5. On the Travel screen, click the Resource Name(s) to paste the copied travel leg(s).
6. Click the Action button, and then click Create/Edit Travel Itinerary.
7. Click the Action button, and then click Paste Legs.
8. On the Selected Travel Legs dialog box, click OK.

To add legs from a Travel plan
1. On the Travel screen, click the Resource Name(s) of your choice.
2. Click the Action button, and then click Create/Edit Travel Itinerary.
3. On the Create/Edit Travel Itinerary dialog box, click the Action button, and then click Add Legs from Travel Plan.
4. On the Add Leg(s) from Travel Plan dialog box, search for and then click the Travel Plan Legs you want to add, and then click Apply.
5. When finished adding all transport legs, click Close, and then click Close again to return to the Travel screen.

To view reminders for incomplete travel itineraries
1. On the ROSS toolbar, click the RE button.
2. On the Reminders dialog box, click the Set Filter Criteria for Itineraries Search button to narrow your search, complete the filter criteria as appropriate, and then click the Search button.
The following graphic shows the Filter Criteria Itineraries dialog box.

The following graphic shows sample information on the Travel tab on the Reminders dialog box.

To specify the frequency for ROSS to check for reminders

1. On the Administration menu, click Personal Settings, and then click the Notification Preferences tab.

2. Under Set Message Defaults and Notification Preferences, in the Earliest Message Date box, type the number for how many days worth of messages you want to view, and then click the Save button.
Picking travel locations

This section explains how to complete the Travel Leg Locations dialog box for adding airports, other locations, organizations, incidents, and travel locations.

To pick travel locations for airports

1. On the Travel Leg Locations dialog box, complete one or more of the following text boxes as appropriate to narrow your search, and then click the Search button:
   - in the Airport Name text box, type the name of the airport
   - in the FAA Code text box, type the FAA Code
   - in the City text box, type the name of the City
   - in the State text box, type the two-letter State code
   - click the Airport Type drop-down arrow, and then click the Airport Type.

   *Use the asterisk (*) to perform a wildcard search.*

2. Under Search Results, click the Airport Name of your choice.
3. Click the Departure Location, and then click Apply.
4. Click the Destination Location, click Apply, and then click OK.
5. To add another leg to the itinerary, click Save, click the Next Leg button, and enter the required information.
6. When finished completing the travel itinerary, click the Set Itinerary Complete button (screen will automatically close).
The following graphic shows the Airports tab on the Travel Leg Locations dialog box.

![Travel Leg Locations dialog box]

**To pick other travel locations**

1. On the **Travel Leg Locations** dialog box, click the **Other Locations** tab.
2. On the **Other Locations** tab, complete the following text boxes as appropriate to narrow your search, and then click the **Search** button:
   - in the **Name** text box, type the name of the travel location
   - in the **City** text box, type the name of the **City**
   - in the **State** text box, type the two-letter **State** code
   - click the **Type** drop-down arrow, and then click the **Type** of the other location.
3. Under **Search Results**, click the **Name** of your choice.
4. Click the **Departure Location**, and then click **Apply**.
5. Click the **Destination Location**, click **Apply**, and then click **OK**.
The following graphic shows the Other Locations tab on the Travel Leg Locations dialog box.

To pick an organization as a travel location

1 On the Travel Leg Locations dialog box, click the Organizations tab.
2 On the Organizations tab, complete the following text boxes as appropriate to narrow your search, and then click the Search button
   - in the Organization text box, type the name of the organization
   - in the Unit Code text box, type the Unit Code of the organization
   - click the Type drop-down arrow, and then click the Type of the organization.
3 Under Search Results, click the Organization Name of your choice.
4 Click the Departure Location, and then click Apply.
5 Click the Destination Location, click Apply, and then click OK.
The following graphic shows the Organizations tab on the Travel Leg Locations dialog box.

To pick an incident as a travel location

1. On the Travel Leg Locations dialog box, click the Incidents tab.
2. On the Incidents tab, complete the following text boxes as appropriate to narrow your search, and then click the Search button
   - in the Incident Name text box, type the Name of the Incident
   - in the Incident # text box, type the Incident Number
   - to search for local incidents, click the Local Incidents check box
   - to search for non-local incidents, click the Non-Local Incidents check box
   - to search for external incidents, click the External Incidents check box.
3. Under Search Results, click the Incident Name of your choice.
4. click the Departure Location, and then click Apply.
5. click the Destination Location, click Apply, and then click OK.
The following graphic shows the Incidents tab on the Travel Leg Locations dialog box.

To pick a travel location
1. On the Travel Leg Locations dialog box, click the Travel Locations tab.
2. On the Travel Locations tab, click the Departure Location name, and then click Apply.
3. Click the Destination Location name, click Apply, and then click OK.

The following graphic shows the Travel Locations tab on the Travel Leg Locations dialog box.

To create a new travel location
1. On the Travel Leg Locations dialog box, click the Travel Locations tab, and then click the New button.
2. In the Location Name text box, type the Name of the New Location, and then click the Save button.
To edit a travel location name
1 On the Travel Leg Locations dialog box, click the Travel Locations tab.
2 On the Travel Locations tab, click the Name of your choice.
3 In the Location Name text box, edit the Name as appropriate, and then click the Save button.

Viewing and printing travel itinerary information

This section explains how to view and print travel itinerary-related information.

See, “Reports - generating and printing reports.”

To view information about the resource
1 On the Travel screen, search for and locate the Incident of your choice, click the Resource Request of your choice, and then click the View button.
2 Click one of the following as appropriate, and then click Close to return to the Travel screen
   - View Incident
   - View Request
   - View Mobilization Itinerary
   - View Resource
   - View Home Dispatch Unit
   - View Requesting Unit
   - View Filling Unit
   - View Associated Requests - you may select a support request and view its parent request, other support requests related to the same parent, and subordinate requests of the support request
   - View Manifest.

To print a travel itinerary for a resource
1 On the Travel screen, search for and locate the Incident of your choice, and then click the Resource Request of your choice.
2 Click the Print button, and then click Print Itinerary.
3 In ROSS Reports, position your mouse toward the top of the web page, and then click the Print file button or press [Ctrl] + P.

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

4 On the Print dialog box, review the printer settings and then click OK.
When finished, close your Internet browser.

The following graphic shows a sample Travel screen. The arrow points to the Print Itinerary option on the Print button.

To print the resource order of a request

1. On the Travel screen, search for and locate the Incident of your choice, and then click the Resource Request of your choice.

2. Click the Print button, and then click Print Resource Order. Standard Header information is included.

3. Click Print button, and then Print Resource Order (Continuous Header) for reduced Header information.

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

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

5. When finished, close your Internet browser.
Exploring travel itineraries in detail

Travel itineraries allow you to document movement of resources to and from incidents. In ROSS, there are several screens that allow you to document basic travel information (ETD/ETA). The Travel screen allows you create a travel itinerary, or route, to document specific details of resource travel. You may add legs to travel itinerary and add or remove resources on each leg.

Basic terminology

The following list outlines some of the term you need to understand when setting travel for resources:

- **No Travel (NT).** Resources have been placed “At Incident” (mobilized) or “At Home” (demobilized). This travel option corresponds to the “Set at Incident” option on the dialog box accessed from the Pending Request screen. The ETD/ETA are set to the date and time the resource is committed.

- **Resource itinerary.** A resource itinerary consists of one or more travel legs for a resource’s travel to and from an incident.

- **Transport Resource.** An aircraft, bus, or other type of vehicle that carries resources (passengers) to or from an incident.

- **Travel ATD/ETE (ATD/ETE).** Tactical aviation resources that have the actual time of departure and estimated time enroute specified.

- **Travel ETA/ETA (ETD/ETA).** Resources displayed on this tab have ETD/ETAs designated. This travel option corresponds to the “Set Travel (No Itinerary)” option on the Pending Request screen. From here, you can also use the Action button to move a resource to another tab or to edit the resource’s ETD/ETA and identify the mode of travel.

- **Travel Itinerary (ITIN).** Resources are either mobilized or demobilized incident resources. This tab corresponds to the “Set Travel (will have Itinerary)” option on the Pending Request screen. From here, you can create new travel legs for the resources, enter transportation information, and set ETD and ETA. Since you can add resources when the resource is committed, so you also must add their travel.

- **Travel Leg.** One segment of a resource’s travel itinerary. A travel leg identifies the mode of travel, departure location, ETD, destination location, and ETA.
• **Travel to be Arranged (TBA).** Resources do not have any travel arrangements. This tab corresponds to the “Set Travel to be Arranged” option on the Pending Request screen. From here, you can only use the Action button to move the resource to another tab, and then arrange the resource’s travel from there. Once resources are removed from this tab, you cannot put them back.

**Using filter criteria**

When working with travel, you can narrow your filter criteria using the following options:

• **Select Incidents button.** Select one or more incidents to display without having to return to the search incidents criteria, or add or remove incidents in the display without disturbing the current incident view.

• **Filter for Mobilizing or Demobilizing resources.** Filter for resources that are mobilizing or demobilizing within a specific date range.

• **View Demobilization Itinerary menu option on the View button.** View a resource’s demobilization itinerary.

• **Filter for multiple request numbers.** Filter for multiple individual request numbers (1, 2, 6), a range of numbers (1-4), or a combination of the two (1, 4-6) on the Request Status screen. (Fig. 3) *Any spaces in the filter criteria are automatically trimmed.*

• **Filter when dealing with rosters and subordinates.** View subordinates by clicking to select the Show Subordinates check box and then filter for multiple request numbers.

• **Other filters available on the Travel screen.** Filter for an individual resource name or a specific request number and/or filter by the catalog and category.
Using the Travel screen - an example

The following graphic shows a sample route of a chartered aircraft picking up passengers along a route in Colorado for transport to a fire in California.

This map outlines the following information:

- The red line shows the route of the transport resource. Numbers one through six define the segments of the route.
- **Segment 1.** The transport resource travels from Denver to Pueblo to pick up Passenger A, the traveling resource.
- **Segment 2.** Passenger A is picked up by the transport resource in Pueblo and travels to Durango. The travel legs for Passenger A’s travel itinerary include segments 2, 3, 4, 5, and 6.
- **Segment 3.** Passenger B is picked up by the transport resource in Durango. Passengers A and B travel to Montrose. The travel legs for Passenger B’s travel itinerary include segments 3, 4, 5, and 6.
- **Segment 4.** Passenger C is picked up by the transport resource in Montrose. Passengers A, B, and C travel to Grand Junction. The travel legs for Passenger C’s travel itinerary include segments 4, 5, and 6.
• **Segment 5.** Passenger D is picked up by the transport resource in Grand Junction. Passengers A, B, C, and D travel to Craig. The travel legs for Passenger D’s travel itinerary include segments 5 and 6.

• **Segment 6.** Passenger E is picked up by the transport resource in Craig. All passengers travel on to California. The travel legs for Passenger E’s travel itinerary include segment 6.

**Understanding the Select Incident Resources table**

The Select Incident Resources table displays the following columns:

- **CI (Complete Itinerary).** An asterisk (*) in this column identifies a resource that has a completed travel itinerary. Click the Set/Unset Itinerary Complete option to add the asterisk (*) to this column.

- **G.** An asterisk in this column identifies a request for a catalog item that has a configuration.

- **Option.** This column identifies the travel status of the resource: Travel to be Arranged (TBA), Travel ETA/ETA (ETD/ETA), Travel ATD/ETE (ATD/ETE), Travel Itinerary (ITIN), or No Travel (NT).

- **Request Number.** This column identifies the number of the resource request.

- **Assignment Resource Name or Resource Name.** For a root request of a configuration, this column displays either the Assignment Resource Name or the Resource Name, based on which option you select.

- **Incident # or Incident Name.** This column displays either the incident Number or Incident Name of the request based on which option you select.

- **Need Date/Time.** This column displays the date and time the resource is needed at the incident based on the request.

- **Departure Location.** This column displays the resource’s current location.

- **Depart Date/Time.** This column lists the ETD (Estimated Time of Departure) from the departure location.

- **Destination Location.** For mobilizing resources, this column displays the “Deliver To” location specified on the request. For demobilizing resources, this column displays the resource’s home location.

- **Destination Date/Time.** For travel with multiple legs, this column is the date/time the resource will arrive at the final destination of the Last Leg of travel.

- **Home Location.** This column displays the resource item’s “Home Unit.”

*To display the Destination Location and Home Location columns, click the Next column(s) button.*