

ROSS TIP

ROSS TIP: IMP-2004-1
Date: April 12, 2004 – V2
Subject: Deleting Duplicate Records and Reassigning User Roles After an Import

Cleaning Up Duplicate Records After Import

If you hand-enter overhead personnel in ROSS and then import their qualification records you will have duplicate Person and Resource Item records. You need to delete the ROSS Person record and its associated Resource Item. First we will explain how to delete a duplicate that does NOT have a User Account in ROSS. **Then we'll address the extra steps required to delete a duplicate record that has a User Account attached to their "ROSS" Person record (page 5).**

Follow these steps to delete a "ROSS" Record that **DOES NOT** have an associated User Account:

1. Log on to the \$ADMIN profile and go to the Person screen.

The screenshot shows the 'Person' screen in the Resource Ordering and Status System (ROSS). The user is logged in as \$NCNCC_ADMIN @ NC-NCC. The current organization is 'National Forests in North Carolina'. The search results table shows two entries for 'AMARAL BONNIE L.' with the same provider unit. The person details form below shows the selected record with fields for Last Name (Amaral), Middle Name/Initial (L.), First Name (Bonnie), and Provider Unit (National Forests in North Carolina). The record source is 'ROSS' and it is marked as an 'Overhead Resource'. Callout boxes provide instructions: (1) Log on to \$ADMIN profile. (2) The ROSS record is easy to identify, since its mixed case and has a middle initial.

Last Name	First Name	Middle Name	ROSS User Name	Provider Unit
AMARAL	BONNIE			National Forests in North Carolina
Amaral	Bonnie	L.		National Forests in North Carolina

Person Details

Last Name * Overhead Resource

Middle Name/Initial Record Source

First Name *

E-mail

Provider Unit

Contact Method

Type	Entry
	<input type="text" value="Entry"/>

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2. Search for the duplicate Person and make sure that you can distinguish the person's name in the ROSS record from that in the imported record. If they are identical, make an edit to the ROSS record that will distinguish it.
3. Next, on the Resource Item screen, search for and highlight the duplicate Resource Item that matches the ROSS record from the Person screen.

The screenshot shows the ROSS interface with the 'Resource Item' screen. The 'Search Results' table is as follows:

Name	Provider	Current Dispatch
AMARAL, BONNIE	NC-NCF	NC-NCC
Amaral, Bonnie L.	NC-NCF	NC-NCC

Callout (3) points to the second row (Amaral, Bonnie L.). Callout (4) points to the 'Delete' button (an 'X' icon) in the 'Overhead Information' section.

4. Delete the ROSS Resource Item.
5. Return to the Person screen.
6. REFRESH THE SCREEN (by pressing the “R” in the upper right hand corner of the screen)
7. Search for the duplicate Person and highlight their “ROSS” record.
8. Make sure the Overhead Resource box is not checked.
9. Click the “Save” button and “Yes” to confirm the change.

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The screenshot shows the ROSS interface with the following elements:

- Search Results Table:**

Last Name	First Name	Middle Name	ROSS User Name	Provider Unit
AMARAL	BONNIE			National Forests in North Carolina
Amaraal	Bonnie	L		National Forests in North Carolina
- Person Details Form:**
 - Last Name: Amaraal
 - Middle Name Initial: L
 - First Name: Bonnie
 - Provider Unit: National Forests in North Carolina
 - Record Source: ROSS
 - Overhead Resource:
- Callouts:**
 - (6) Refresh the screen (points to the Refresh button in the top right).
 - (7) Highlight the "ROSS" record (points to the second row in the search results table).
 - (8) make sure the Overhead Resource Box is not checked (points to the "Overhead Resource" checkbox).
 - (9) Save the change (points to the Save button in the bottom right).
 - This may not say "ROSS" (points to the "Record Source" field).

10. Click the Delete button to remove the selected record.
11. Answer "Yes" to confirm the deletion.
12. The "ROSS" Person and Resource Item records have been removed from the database.

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The screenshot shows the ROSS application window with the 'Person' record for Bonnie Amaral. A 'Confirm Deletion' dialog box is open, asking 'Are you sure that you want to delete?'. The dialog has 'Yes' and 'No' buttons. A callout box labeled '(10) Click the Delete button' points to the 'Delete' button (represented by an 'X' icon) in the right-hand toolbar of the person record. Another callout box labeled '(11) Confirm the deletion' points to the 'Yes' button in the 'Confirm Deletion' dialog.

Last Name	First Name	Middle Name	ROSS User Name	Provider Unit
AMARAL	BONNIE			National Forests in North Carolina
Amaral	Bonnie			National Forests in North Carolina

Person Details

Last Name * Amal
Middle Name/Initial
First Name * Bonnie
E-mail bamaral@fs.fed.us
Provider Unit National Forests in North Carolina Unlink

Contact Method

Type	Entry

NOTE: A future version of ROSS will implement “cascading deletes”. This will eliminate the need to delete the Resource Item before deleting the Person.

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Transferring User Account Privileges Between Duplicate Persons in ROSS

If the “ROSS” Person record you wish to delete has a User Account, you must to transfer the User Roles to the imported Person record before deleting. The following steps should be performed by the primary Account Manager for the dispatch office while logged on to the local \$ADMIN account.

This illustration shows duplicate Person records with a User Account profile attached to the “ROSS” record.

Resource Ordering and Status System (ROSS)

File Administration Resource Status Window Help

Person User: \$NCNCC_ADMIN @ NC.NCC

Current Organization: National Forests in North Carolina

Search Results

Last Name	First Name	Middle Name	ROSS User Name	Provider Unit
KASTLER	ROBIN			National Forests in North Carolina
Kastler	Robin		RKASTLER	National Forests in North Carolina

Person Details

Last Name * Kastler Overhead Resource

Middle Name/Initial Record Source ROSS

First Name * Robin

E-mail rkastler@fs.fed.us

Provider Unit National Forests in North Carolina Unlink

Contact Method

Type	Entry

User Account attached to the “ROSS” Person record. Transfer user privileges before deleting this Person.

The Record Source for the highlighted Person record

Follow these steps to delete a “ROSS” Person Record that DOES HAVE an associated User Account:

1. Log on to ROSS using the \$ADMIN profile and go to the User Account screen.
2. Use the drop-down boxes to select the appropriate Dispatch Organization and User.
3. Make a record of the Person’s Provider Organization, User Name and assigned Roles. (HINT: to verify the Provider Organization check the Current Organization drop-down on the Person Screen.)

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- Repeat steps 2 and 3 for each ROSS User that has duplicate Person record (i.e., a “ROSS” record and a record imported from a qualifications system).

The screenshot shows the 'User Accounts' window in the ROSS system. The window title is 'Resource Ordering and Status System (ROSS) - PRACTICE *** PRACTICE *** PRACTICE *** PRACTICE'. The user is logged in as 'SNCNCC_ADMIN @ NC-NCC'. The interface is divided into three main sections: 'User Accounts', 'User Information', and 'User Roles'. In the 'User Accounts' section, the 'Organization' dropdown is set to 'North Carolina Interagency Coordination Center' and the 'User' dropdown is set to 'KASTLER, ROBIN'. In the 'User Information' section, the 'Username' field contains 'RKASTLER'. In the 'User Roles' section, there are two panes: 'Available Roles' and 'Assigned Roles'. The 'Available Roles' pane lists: Account Manager, Data Manager, Dispatch Manager, Office Not Dispatching - ROSS, Qualifications Import Manager, and Selection Area Manager. The 'Assigned Roles' pane lists: Basic User and Dispatcher. Three callout boxes provide instructions: (1) Log on to \$ADMIN profile (pointing to the user name in the top right), (2) Select the correct Organization and User Name (pointing to the dropdowns in the User Accounts section), and (3) Make a record of the User's Assigned Roles (pointing to the Assigned Roles list).

Sample table for recording Assigned User Roles for each duplicate Person:

User Name	Provider Organization	Acct Mgr	Basic User	Data Mgr	Disp. Mgr.	Dis-patcher	Quals Import Mgr	Select. Area Mgr	Ofc. Not Disp.
RKASTLER	NC-NCF		X			X			

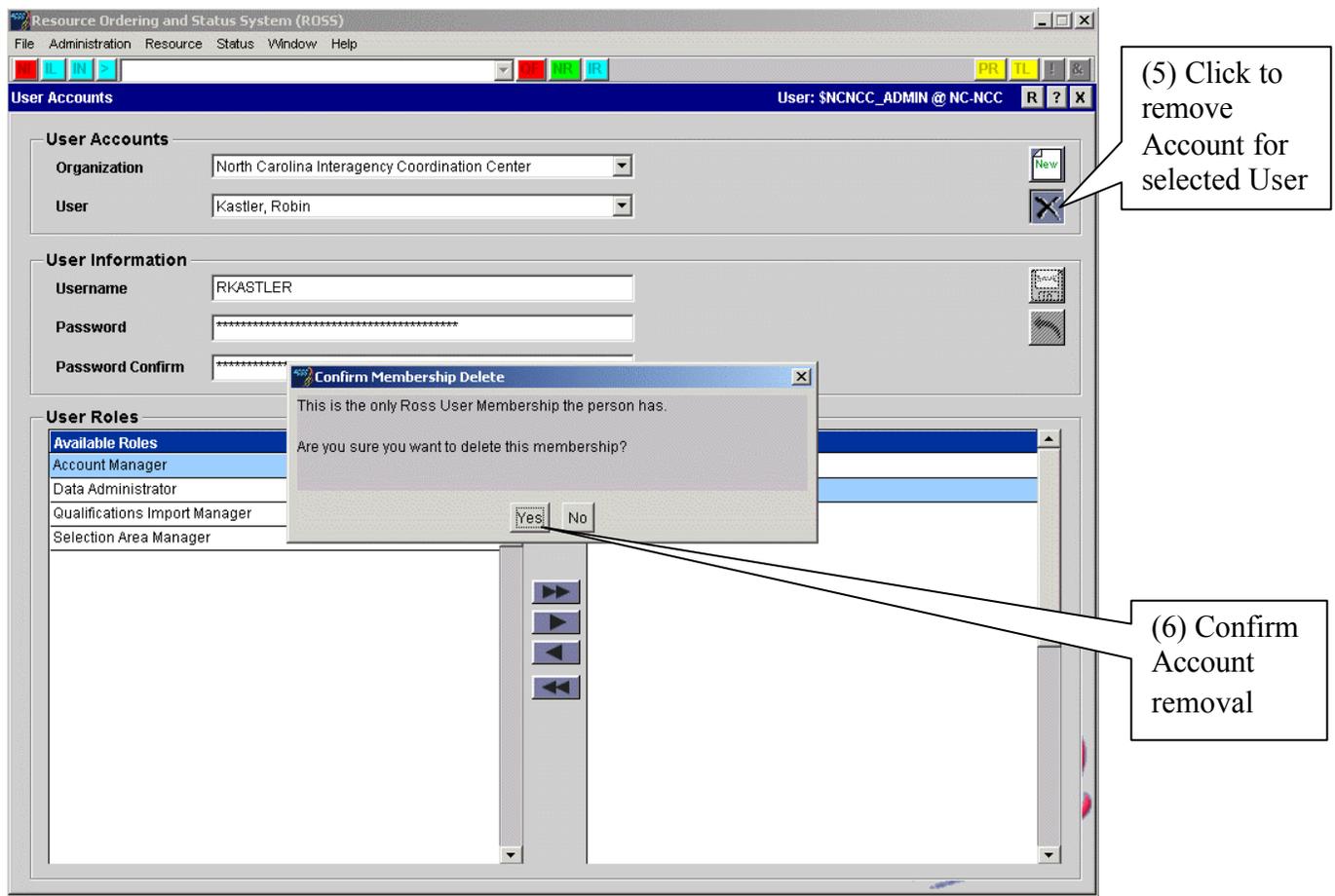
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- Where possible, use the Delete button to remove User Accounts that are tied to duplicate Persons
HINT: A User Account may not be deleted if there is Request documentation associated with the user. In this case, remove all the User Roles and proceed to Step 7.
CAUTION: each dispatch office, *except NICC*, should have two \$ADMIN accounts (their own and one for their parent dispatch office). **DO NOT DELETE THESE ACCOUNTS!** If ROSS TEAM members or the ROSS HELPDESK have Assigned Roles in your office, PLEASE DO NOT REMOVE THEM, as they may have been assisting you in problem solving.
- Confirm the deletion.



- Go back to page one of this ROSS Tip and follow the procedures to delete the ROSS Resource Item and Person records for each duplicate. Return to page eight when you're finished.

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8. After you have deleted the duplicate Person and Resource Item records, return to the User Account Screen.
9. Select the correct Dispatch office for the first User Account on your list.
10. Click the New button to begin recreating the User Account.
11. Use the pop-up dialog box to Search for and Select the remaining Person record (i.e., the imported record).

The screenshot shows the 'Resource Ordering and Status System (ROSS)' interface. The main window is titled 'User Accounts' and displays a form for creating a new user account. The 'Organization' is set to 'North Carolina Interagency Coordination Center' and the 'User' is 'ADMIN, NCNCC_DATA'. A 'New User Account' dialog box is open, showing a 'Search People' section with fields for 'First Name', 'Middle Name', and 'Last Name' (containing 'kastler'). Below the search fields are radio buttons for 'Search only people in Organization' and 'Search people in other Organizations'. The 'Select Person' table below shows a single entry: ROBIN, KASTLER, NC-NCF. Callouts from the text above point to the 'New' button, the search fields, and the 'Select Person' table.

First Name	Middle Name	Last Name	Unit ID
ROBIN		KASTLER	NC-NCF

12. Using the information you recorded, recreate the first Person's User Name and reset their default Password.
HINT: If you were unable to delete the original User Account (Step 5) due to associated Request documentation, you will have to create a different User Name or edit the old one. User Names may not be duplicated.
13. Using the table you created (page 6), reassign the User Roles.

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14. Repeat for each Person on your list.
15. Notify the affected Users that their Password has been reset to the default and advise them to log on and change their Password.

HINT: Advise Users if you changed their User Name because you could not delete their original User Account.

The screenshot displays the 'User Accounts' management interface in the ROSS application. The window title is 'Resource Ordering and Status System (ROSS)'. The user is logged in as '\$NCNCC_ADMIN @ NC-NCC'. The interface is divided into three main sections: 'User Accounts', 'User Information', and 'User Roles'.
1. **User Accounts:** Organization is set to 'North Carolina Interagency Coordination Center' and the User is 'KASTLER, ROBIN'.
2. **User Information:** Username is 'RKASTLER', Password is masked with asterisks, and Password Confirm is also masked. A 'SAVE' button is visible.
3. **User Roles:** A list of 'Available Roles' includes 'Account Manager', 'Data Administrator', 'Qualifications Import Manager', and 'Selection Area Manager'. The 'Assigned Roles' list shows 'Basic User' and 'Status Only Dispatch' selected. Navigation arrows are present between the two role lists.
Callout boxes provide specific instructions:
- Box (12) points to the Username field: '(12) Reassign User Name and reset default Password'.
- Box (13) points to the Assigned Roles list: '(13) Reassign User Roles and click Save'.