Person - defining information about people

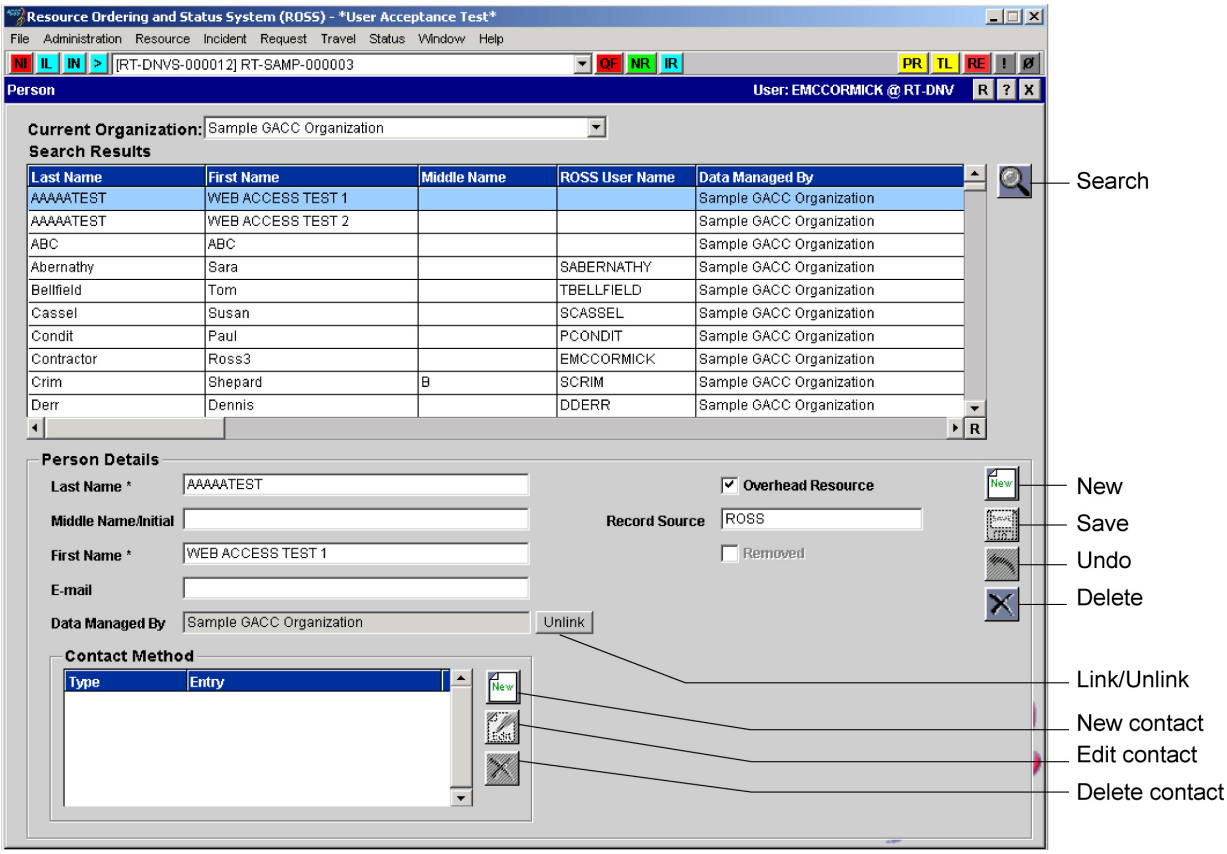
This chapter explains how to create, modify, and delete information about people that is stored in the ROSS database. The type of activities you can perform include:

- adding and modifying information about a person
- linking and unlinking a person to an organization
- designating a person as an overhead resource
- adding, modifying, and deleting contact information
- deleting a person from the ROSS database.

To access the Person screen

- On the **Administration** menu, click **Person**.

Person screen



To locate a person in the ROSS database

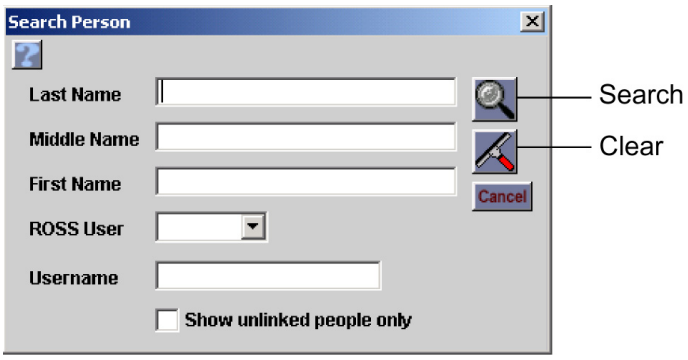
This task explains how to locate overhead personnel that are in one of your organizations or a person who has been "unlinked" from an organization, and therefore has no current organization.

1 On the **Person** screen, click the **Current Organization** drop-down arrow, and then click to select the **Organization** for that resource.

2 On the **Person** screen, click **Search**.

3 On the **Search Person** dialog box, type information into as many boxes as possible to narrow your search, and then click **Search**.

The following diagram shows the Search Person dialog box. From here, you can specify information to locate existing local or unlinked personnel in the ROSS database.



Need more help performing a search? See "Performing searches," in the chapter "Getting started with ROSS."

To add a person's name to the ROSS database

Be sure to verify that the person is not already defined in the ROSS database!

1 Under **Current Organization**, click the drop-down arrow, highlight to select the organization of your choice, and then click **New**.

2 Under **Person Details**, type the following information

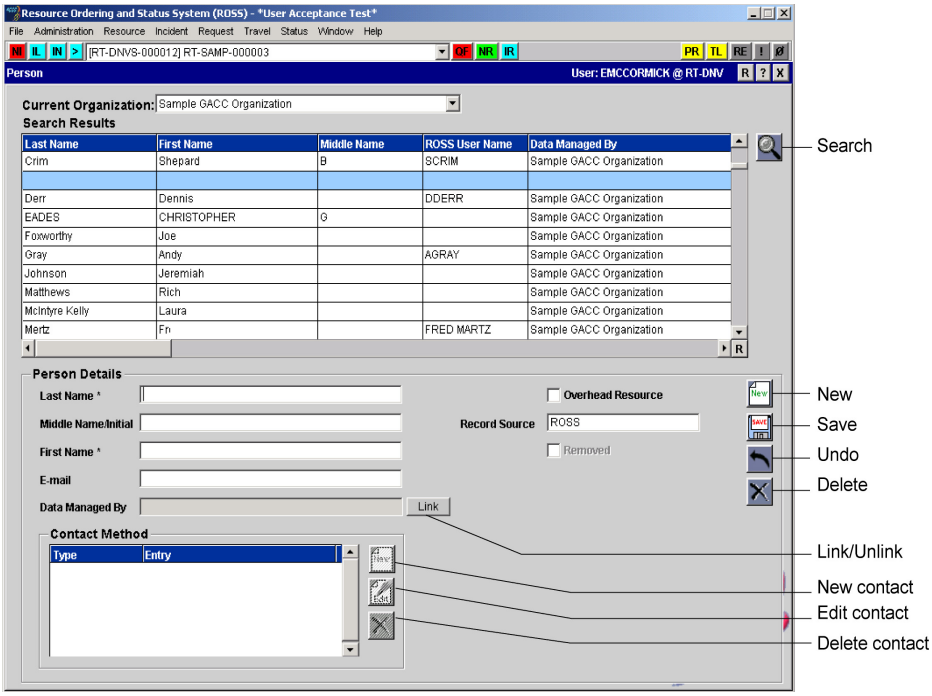
- Last Name
- Middle Name/Initial, if available
- First Name
- Email address, if available.

3 To designate the **Person** as an overhead resource, select the **Overhead Resource** check box.

4 Click **Save** or click the **Link** button.

For more information about linking a person to a Provider Organization, see "To link a person to a Provider organization," later in this chapter.

The following diagram show the Person screen as it appears when adding a new Person to the ROSS database.

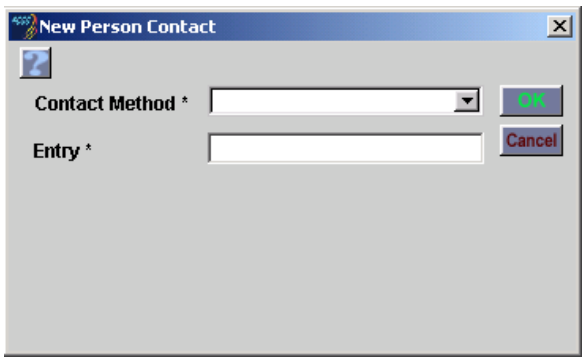


You can now proceed to the next task, "To add contact information."

To add contact information

1. Highlight to select the **Person** of your choice.
2. Under **Contact Method**, click **New**.
3. Click the **Contact Method** drop-down arrow, and the select the **Contact Method** of your choice.
4. In the **Entry** box, type the corresponding telephone number for that **Contact Method**, and then click **OK**.
5. Add additional contact method information as appropriate.

The following diagram shows the New Person Contact dialog box. From here, you can add Cell, Fax, Pager, and Phone numbers.



To modify Person information

1 On the **Person** screen, search for and then highlight to select the **Person** of your choice.

2 Under **Person Details**, highlight and then type to replace the following information, as appropriate

- Last Name
- Middle Name/Initial
- First Name
- Email address.

3 To change the overhead resource designation, select or clear the **Overhead Resource** check box, as appropriate.

To change cell phone, pager, fax, or phone information, perform the next task, "To change contact information."

4 When finished, click **Save**.

To change contact information

1 On the **Person** screen, search for and then highlight to select the **Person** of your choice.

2 Under **Contact Method**, click **Edit**.

3 Click the **Contact Method** drop-down arrow, and then select the **Contact Method** of your choice.

4 In the **Entry** box, type the corresponding telephone number for that **Contact Method**.

To remove contact information

1 On the **Person** screen, search for and then highlight to select the **Person** of your choice.

2 Under **Contact Method**, click **Delete**.

3 On the **Confirm Deletion** dialog box, click **Yes** to confirm or click **No** to cancel.

To link a person to a Provider organization

When linking a Person to the Provider Unit, the default value is the Current Organization as displayed on the top left of the Person screen.

1 On the **Person** screen, search for and then highlight to select the **Person** of your choice.

*If a person is unlinked, you must first check the **Show unlinked people only** check box, in the **Search Person** dialog box.*

2 Under **Provider Unit** next to the **Data Managed By** box, click **Link**.

To unlink a person to a Provider organization

1 On the **Person** screen, search for and then highlight to select the **Person** of your choice.

2 Under **Provider Unit** next to the **Data Managed By** box, click **Unlink**, and then click **Save**.

To designate a person as an overhead resource

1 On the **Person** screen, search for and then highlight to select the **Person** of your choice.

2 Select the **Overhead Resource** check box, and then click **Save**.

To remove a person as an overhead resource

1 On the **Person** screen, search for and then highlight to select the **Person** of your choice.

2 Clear the **Overhead Resource** check box, and then click **Save**.

To delete a person from the ROSS database

You can not delete a resource assigned to an Incident. To remove a resource from view that is assigned to an Incident, see the next task, "To remove a resource from view."

1 On the **Person** screen, search for and then highlight to select the **Person** of your choice, and then click **Delete**.

2 On the **Confirm Deletion** dialog box, click **Yes** to confirm or click **No** to cancel.

To remove a resource from view

*This task explains how to remove from view a resource that is assigned to an Incident. Once you click **Save**, this resource will only display on the Person screen, but not any other ROSS screen.*

- On the **Person** screen, search for and highlight to select the **Person** of your choice, click the **Remove** check box, and then click **Save**.

To un-remove a resource from view

- On the **Person** screen, search for and highlight to select the **Person** of your choice, click to clear the **Remove** check box, and then click **Save**.