Pending Request - managing requests for resources

This chapter explains how to take action on all requests that are pending with your organization. You can perform the following primary actions from the Pending Request screen:

- **Fill**. Fill the request within your organization.
- **Place**. Place the request with another organization below your level in the dispatch hierarchy or within your Selection Area. *Unable to fill the request within your organization.*
- **Place External**. Place the request externally with a non-ROSS dispatch center. *Unable to fill the request within your organization.*
- **Place Up**. Place-up the request to the organization above you in the dispatch hierarchy. *Unable to fill the request within your organization or at organizations at or below your level.*
- **Unable to Fill (UTF)**. Return the request to that organization as UTF. *Unable to fill the request within your own organization that was placed by another organization.*

Unless a request is placed external, once it is placed or placed up the request becomes pending with the receiving organization and the request no longer appears on the placing organization's Pending Request screen. To see the placed external request, the placing organization must click the "Place Status-Only and External Only" check box.

This chapter includes the following topics:

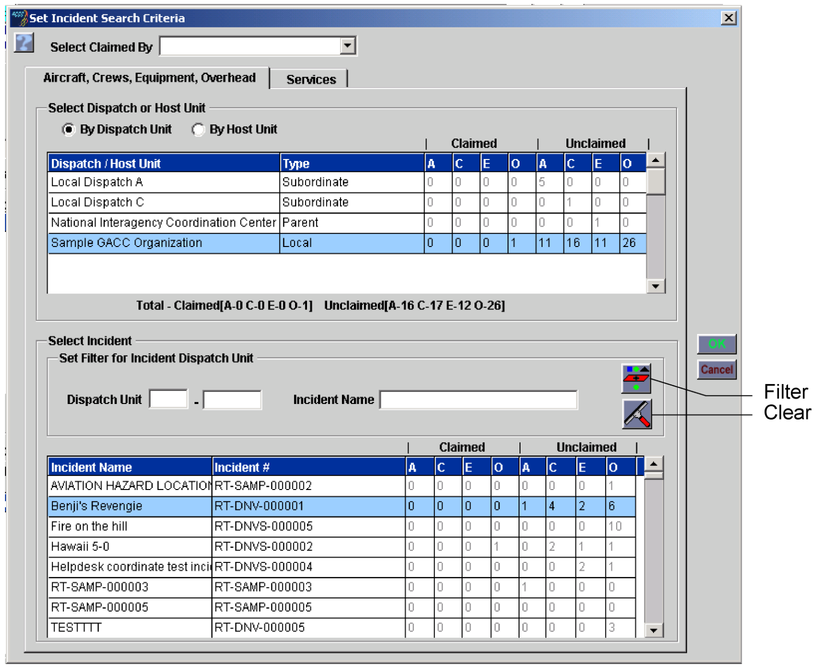
- Understanding the Select Pending Request(s) table
- Setting Pending Request filters
- Claiming Pending Request
- Performing Actions on a Pending Request
- Viewing resource details
- Using the Note button
- Printing Pending Requests
- Working with the Select Action for Pending Request tabs
- Working with the Services tab.

If an asterisk (*) appears in the S column of the Select Pending Request(s) table, there are one or more related Support Requests for that Pending Request.

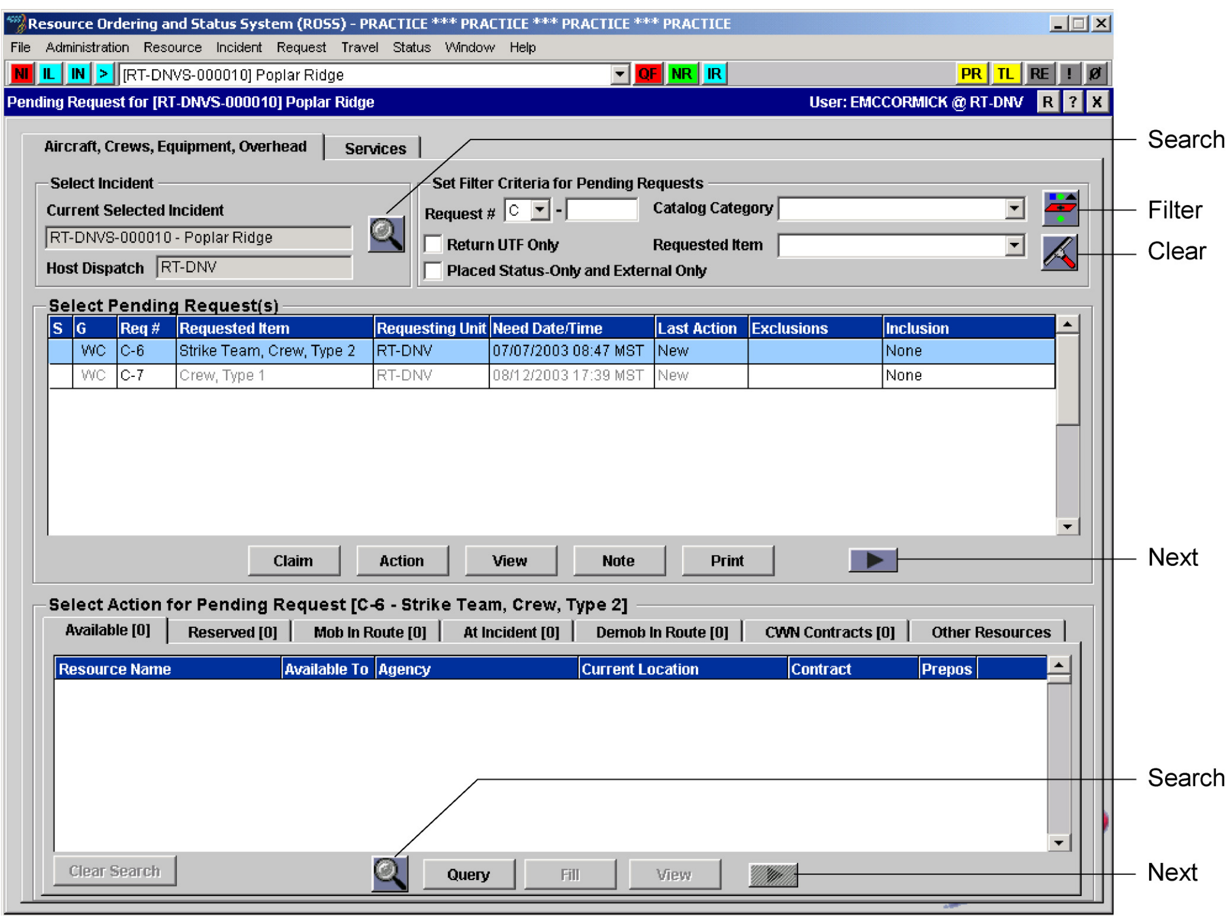
To access the Pending Request screen

- On the **Request** menu, click **Pending Request**, or click the **PR** button.

Set Incident Search Criteria dialog box.



Pending Request screen - Aircraft, Crews, Equipment, Overhead tab



To change the Incident context of the Pending Request screen

The Set Incident Search Criteria dialog box displays automatically when you access the Pending Request screen for the first time or whenever you click Search to change the Incident context.

1 Under **Select Incident**, click **Search**.

2 On the **Set Incident Search Criteria** dialog box under **Select Dispatch or Host Unit**, click to select the **Dispatch/Host Unit** of your choice.

*If the **Dispatch/Host Unit** you selected is your subordinate or parent, use the filter feature to further refine your search.*

3 Under **Select Incident**, click **Filter**, click to select the **Incident Name** of your choice, and then click **OK**.

Understanding the Select Pending Request(s) table

The Select Pending Request(s) table lists Pending Requests and contains columns that allow you to quickly identify the following information:

- **S**. An asterisk (*) in this column indicates that a support request exists for this Pending Request. An "S" in this column indicates that this is a support request to another request.

  Only those non-local support requests that you control the release/ reassignment display on this table.

- **G**. This column identifies the configuration option specified when the request for a configuration catalog item was created.
  - WC - Catalog Item with Configuration.
  - WO - Catalog Item without Configuration.
  - SI - Selected Items from Configuration.
- **Request Number**. The number assigned to the request when it was generated.
- **Requested Item**. The requested catalog item. For automatically placed Assignment Roster requests, this column lists the specific name of the requested resource.
- **Requesting Unit**. The unit that created the request.
- **Need Date/Time**. When the requested resource is needed.
- **Last Action**. The last action taken on the request, as follows
  - New - The request has not been placed or has been placed but not retrieved or UTF'd.
  - RTR - The request has been placed and retrieved, and the Unit ID of the dispatch unit that retrieved the request displays.
  - UTF - The request has been placed and UTF'd, and the Unit ID of the dispatch unit that UTF'd the request displays.

- **Exclusions**. All exclusions designated on the request, which may include
  - Federal Only
  - Non-Federal Only
  - Host Agency Only
  - State Only
  - Contractor Not Acceptable
  - No Trainee - *overhead only*
  - Trainee Required - *overhead only.*
- **Inclusions**. All inclusions designated on the request, which may include
  - None **-** *no inclusions*
  - Portal-to-Portal Acceptable
  - EFF/AD Acceptable - *overhead only*
  - Trainee acceptable **-** *overhead only.*

*To view the following columns, click the **Next** button.*

- **Note**. Specific information about the request, which may be one of the following
  - No note **-** *remains blank*
  - Check Availability - *a dispatcher is checking the availability of a resource to be used to fill the request. Take no actions on the request*
  - Hold Request - *a request put on hold. Take no actions on the request.*

Check Availability and Hold Request allows you to be aware of the status of the request. ROSS does not stop you from performing actions on the request.

- **Contact**. Contact information for the request.
- **Financial Code/Compact**. If present, this request may have a particular financial code that may be different than requests that do not have one in this column. The requestor has assigned a financial code to this request to obtain a certain resource from a county, state, or other federal agency.

*To view the following columns, click the **Next** button.*

- **Claimed By**. The dispatcher who claimed the request.

Setting Pending Request filters

The Pending Request Filters tab on the Personal Settings screen is located on the Administration menu. By setting your Pending Request filters and specifying which Incidents you can view, you can limit the requests that appear on the Pending Request screen. You can filter Pending Requests by Dispatch Unit and/or by Host Unit. Two special Types include “Selection Area” that indicates that you are a part of that organization’s Selection Area, and “Roster” that indicates the organization has a resource item with a non-local roster to which one of your resources is assigned.

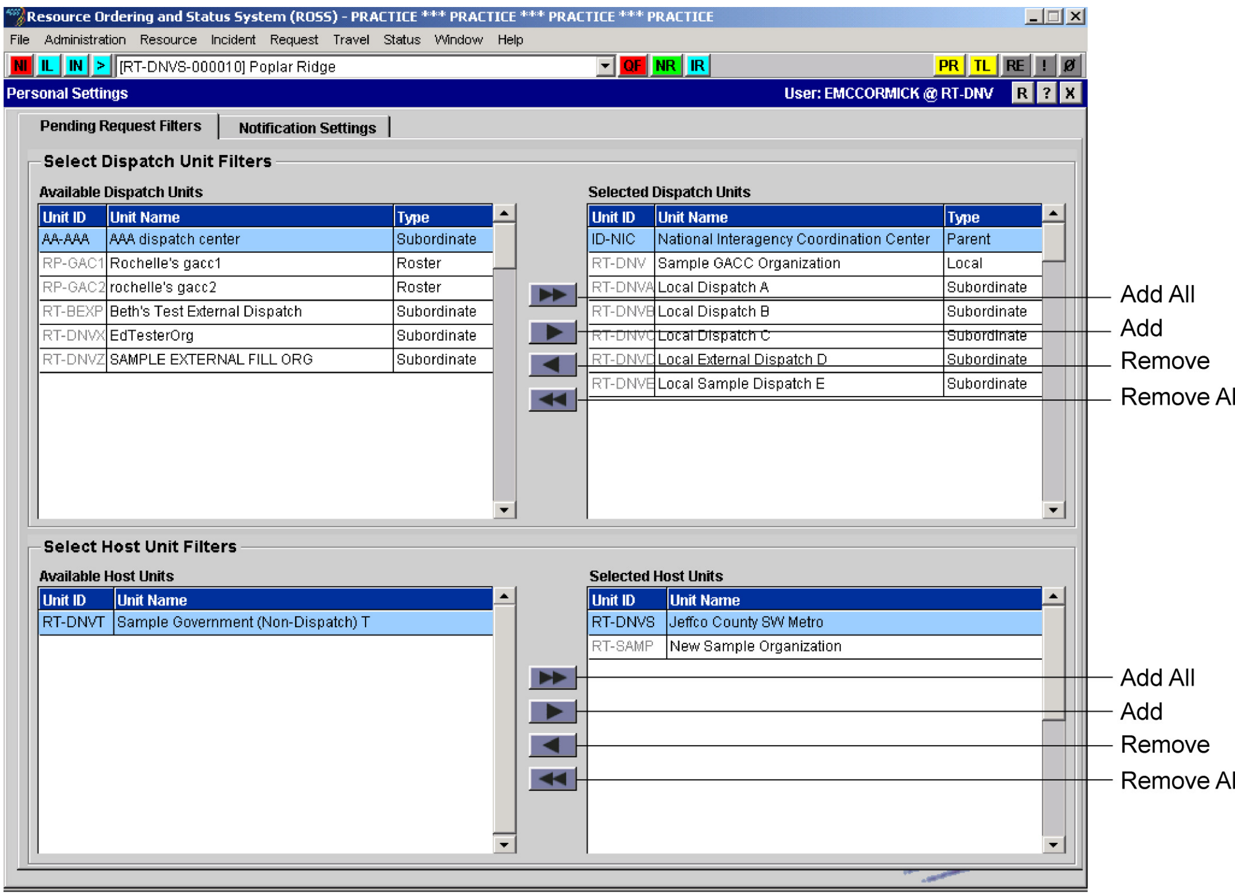
For more information, refer to the following chapters in this ROSS User's Guide:

- *Personal Settings - setting request filters*
- *Selection Area - defining placement authority*
- *Roster - managing subordinate requests.*

To access the Personal Settings screen

- On the **Administration** menu, click **Personal Settings**.

Personal Settings screen - Pending Request Filters tab



To set your Pending Request filters

1 To filter Pending Requests by dispatch unit, click to select the **Unit ID** of your choice under **Available Dispatch Units**, and then click the corresponding **Add** arrow.

*To select all **Available Dispatch Units**, click the corresponding **Add All** arrow. To remove a dispatch unit, under **Selected Dispatch Unit**, click to select the **Unit ID** of your choice and then click the corresponding **Remove** arrow. To remove all dispatch units, click the corresponding **Remove All** arrow.*

2 To filter Pending Requests by host unit, under **Available Host Units**, click to select the **Unit ID** of your choice and then click the corresponding **Add** arrow.

*To select all **Available Host Units**, click the corresponding **Add All** arrow. To remove a host unit, under **Selected Host Unit**, click to select the **Unit ID** of your choice and then click the corresponding **Remove** arrow. To remove all host units, click the corresponding **Remove All** arrow.*

Claiming a Pending Request

When you claim a Pending Request, you are informing other dispatchers in your unit that you are working on it. While it is best to always claim a pending request before working on it, ROSS will not prevent any actions from being performed, whether it is claimed or not!

To display a specific request type for aircraft, crews, equipment, and overhead

You can only view one Catalog at a time!

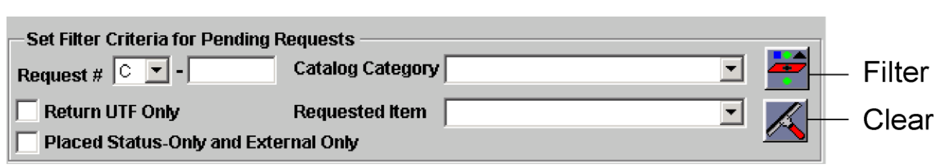
1 On the **Pending Request** screen under **Set Filter Criteria for Pending Requests**, click the **Request #** drop-down arrow, and then select the **Catalog Type** of your choice.

2 To further narrow your search, perform one or more of the following

- to display by **Request Number**, type the specific number in the box next to the **Request #** box
- to display by **Catalog Category**, click the **Catalog Category** drop-down arrow, and then click to select the **Catalog Category** of your choice
- to display requests generated by your organization and returned as UTF, click the **Return UTF Only** check box
- to display externally placed and status-only requests, click the **Placed Status-Only and External Only** check box
- to display by **Requested Item**, click the **Requested Item** drop-down arrow, and then click to select the **Requested Item** of your choice.

3 When finished setting the filter criteria, click **Filter**.

The following diagram shows the Set Filter Criteria for Pending Requests area of the Pending Requests screen.



To claim a Pending Request for aircraft, crews, equipment, and overhead

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When working from the Pending Request screen, you can claim and work with more than one Pending Request at a time. To claim more than one ***Pending Request****, press* CTRL*, and then click to select the* ***Pending Request(s)*** *of your choice.*

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1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Claim** button, and then click to select **Claim** on the drop-down menu.

To claim a Pending Request for services

1 On the **Pending Request** screen, click the **Services** tab, and then click to select the **Pending Request** of your choice.

2 Click the **Claim** button, and then click to select **Claim** on the drop-down menu.

To unclaim a Pending Request

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Claim** button, and then click to select **Clear** on the drop-down menu.

Performing Actions on a Pending Request

The Action button allows you to perform many Pending Request functions, including:

- cancel a Pending Request
- designate a Pending Request as UTF
- cancel a Pending Request received back as UTF
- retrieve a Pending Request
- edit a Pending Request
- edit multiple Pending Requests
- add/edit supplemental requests
- create a Support Request
- add documentation
- place up the Pending Request
- fill the Pending Request with an external resource
- create a new external resource
- fill the Pending Request with a new resource.

Actions that appear dimmed are not available for the type of Pending Request you are currently viewing.

To cancel a Pending Request

You can cancel a Pending Request from the Pending Request screen only if your organization generated the request and only if the request has not yet been placed, placed up, or placed external. Canceling a Pending Request that has associated support requests does not cancel those support requests.

You can cancel UTF requests that you placed but that were UTF'd back.

For more information about canceling a Pending Request from the Request Status screen, see the task, "To cancel a request," in the chapter, "Request Status - managing the status of requests," in this ROSS User's Guide.

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Action** button, and then click to select **Cancel Request**.

3 On the **ROSS Confirmation Message** dialog box, click **Yes** to confirm or click **No** to cancel.

To designate a Pending Request as Unable To Fill (UTF)

This task applies only to requests that were placed to your organization.

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Action** button, and then click to select **UTF Request**.

3 On the **ROSS Confirmation Message**, click **Yes** to confirm or click **No** to cancel.

To cancel a Pending Request received back as UTF

This applies only to requests that your dispatch organization created and then placed to another dispatch organization.

1 On the **Pending Request** screen under **Set Filter Criteria for Pending Requests**, click the **Return UTF Only** check box, set other filter criteria, and then click the **Filter** button.

2 Click to select the **Pending Request** of your choice, click the **Action** button, and then click to select **Cancel UTF Request**.

3 On the **ROSS Confirmation Message**, click **Yes** to confirm or click **No** to cancel.

To retrieve a Pending Request

*This task applies only to requests that were placed to a status-only or external dispatch unit. To retrieve internally placed requests, you must locate the request on the **Request Status** screen, and then click the **Action** button.*

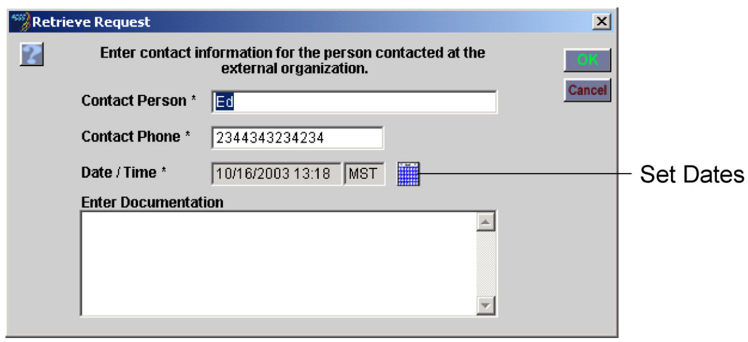
1 On the **Pending Request** screen under **Set Filter Criteria for Pending Requests**, click the **Placed Status-Only and External Only** check box, set other filter criteria, and then click the **Filter** button.

2 Click to select the **Pending Request** of your choice, click the **Action** button, and then click to select **Retrieve Request**.

3 On the **Retrieve Request** dialog box, complete the information as appropriate for that request, and then click **OK**

4 On the **ROSS Confirmation Message**, click **Yes** to confirm or click **No** to cancel.

The following diagram shows the Retrieve Request dialog box.



To edit a Pending Request

This applies to a Pending Request created by your dispatch organization.

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Action** button, and then click to select **Edit Request**.

3 On the **Edit Request** dialog box, change the following fields as appropriate

- Quantity
- Need Date/Time
- Deliver To
- Financial Code/Compact
- Special Needs
- Reporting Instructions
- Incident Ordering Contact
- Request Contact
- Select Features
- Select Inclusions and Exclusions.

4 When finished, click **OK**.

To review an example of the Edit Request dialog box, see "Editing a request," in "New Request - creating and editing new requests."

To edit multiple pending requests

1 On the **Pending Request** screen under **Select Pending Request(s)**, click and hold CTRL, and then click to select the **Pending Requests** of your choice.

2 Click the **Action** button, and then click to select **Edit Request**.

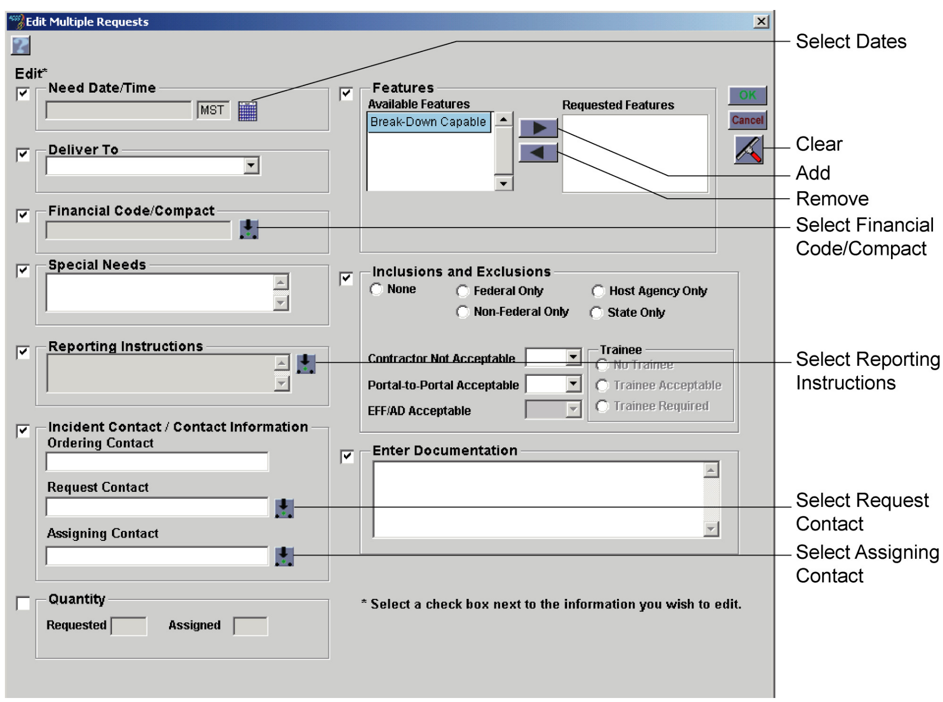
3 Click the check box next to the field you want to change, and then modify the information as appropriate.

4 Continue editing the fields of your choice.

Information/fields that do not apply to the requests you selected appear dimmed or cannot be selected for editing. For example, you cannot click the Quantity check box for a resource item that cannot be ordered in a quantity greater than one (1).

5 When finished, click **OK**.

The following diagram shows the Edit Multiple Pending Requests dialog box.



To add/edit supplemental requests

This applies to supplemental requests the your dispatch organization created. For more information about supplemental requests, see "Creating a Supplemental request," in "New Request - creating and editing new requests."

1 On the **Pending Request** screen, click the **Service** tab, and then click to select the **Pending Request** of your choice.

2 Click the **Action** button, and then click to select **Add/Edit Supplemental**.

3 Complete the supplemental request form as appropriate, and then click **Close**.

To create a Support Request

Very Important: *When you create a support request for a request placed to your organization, you have the option of retaining control of the request. For more information, see "Creating a Support Request," in "Request Status - managing the status of requests."*

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Action** button, and then click to select **Create Support Request**.

3 Complete the **Create Support Request** dialog box as appropriate, and then click **Close**.

To add documentation

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

*To add identical documentation to more than one **Pending Request**, press CTRL, and then click to select the **Pending Requests** of your choice.*

2 Click the **Action** button, and then click to select **Add Documentation.**

3 On the **Request Documentation** dialog box, type the appropriate **Documentation** in the **Enter Documentation** box, click the **Add Documentation** button, and then click **Close**.

To review an example of the Request Documentation dialog box for one or for multiple requests, see "Adding Documentation," in "New Request - creating and editing new requests."

To place up a Pending Request

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Action** button, and then click to select **Place Request Up**.

3 On the **ROSS Confirmation Message** dialog box, click **Yes** to confirm or click **No** to cancel.

4 On the **Request Action Message** dialog box, click **OK**.

*The Request Action Message dialog box appears only if you click **Yes** on the **ROSS Confirmation Message** dialog box.*

To fill the Pending Request with an external resource

The Fill with External Resource option allows you to fill a request with a resource from either a status-only or external dispatch unit.

In ROSS version 2.1, you must have the Dispatch Manager user role to fill a Pending Request with an external resource.

1 On the **Pending Request** screen, click to select the **Placed Status-Only and External Only** check box, and then search for and select the **Pending Request** of your choice.

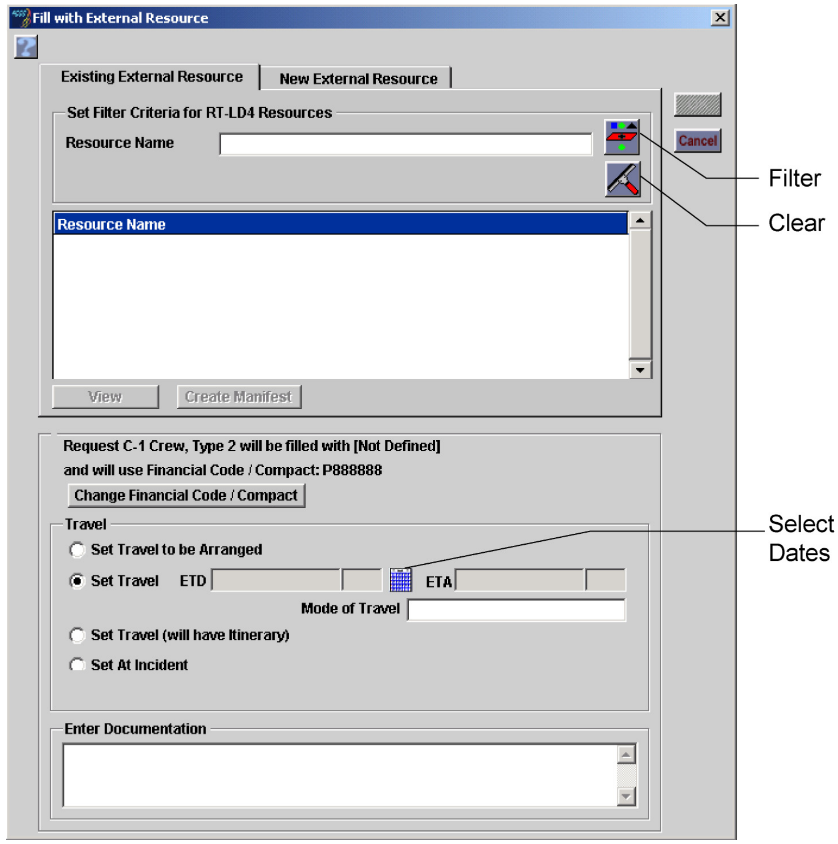
2 Click the **Action** button, and then click to select **Fill with External Resource**.

If the No Results Found dialog box appears, there are no previously entered resources entered into ROSS that are currently available to fill the request. For more information, see the next task "To create an external resource."

3 Search for and then click to select the **Resource Name** of your choice.

4 Complete the remaining information on the **Existing External Resource** tab as appropriate for that resource, and then click **OK**.

The following diagram shows the Existing External Resource tab on the Fill with External Resource dialog box.



Status-only and external dispatch unit resources display on the Existing External Resource tab.

The following diagram shows the No Results Found dialog box.

To create a new external resource

You can create a new external resource, but you cannot create a new status-only resource. Only a status-only dispatch unit can create a status-only resource, using the Resource Item screen.

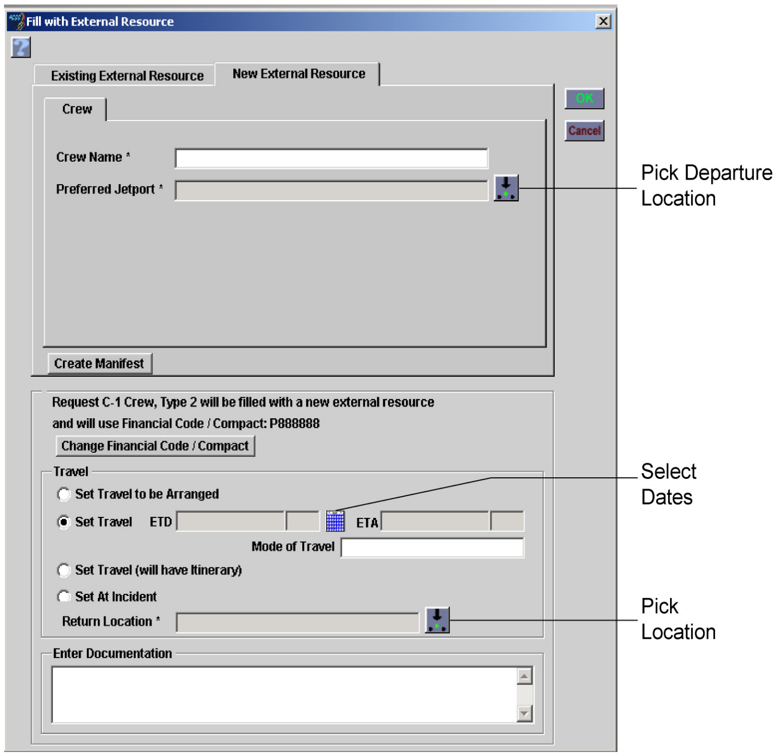
1 On the **Pending Request** screen, click to select the **Placed Status-Only and External Only** check box, and then search for and select the **Pending Request** of your choice.

2 Click the **Fill** button, and then click to select **Fill with External Resource**.

3 On the **Fill with External Resource** dialog box, click the **New External Resource** tab.

4 Complete the remaining information on the **New External Resource** tab as appropriate for that resource, and then click **OK**.

The following diagram shows the New External Resource tab on the Fill with External Resource dialog box.



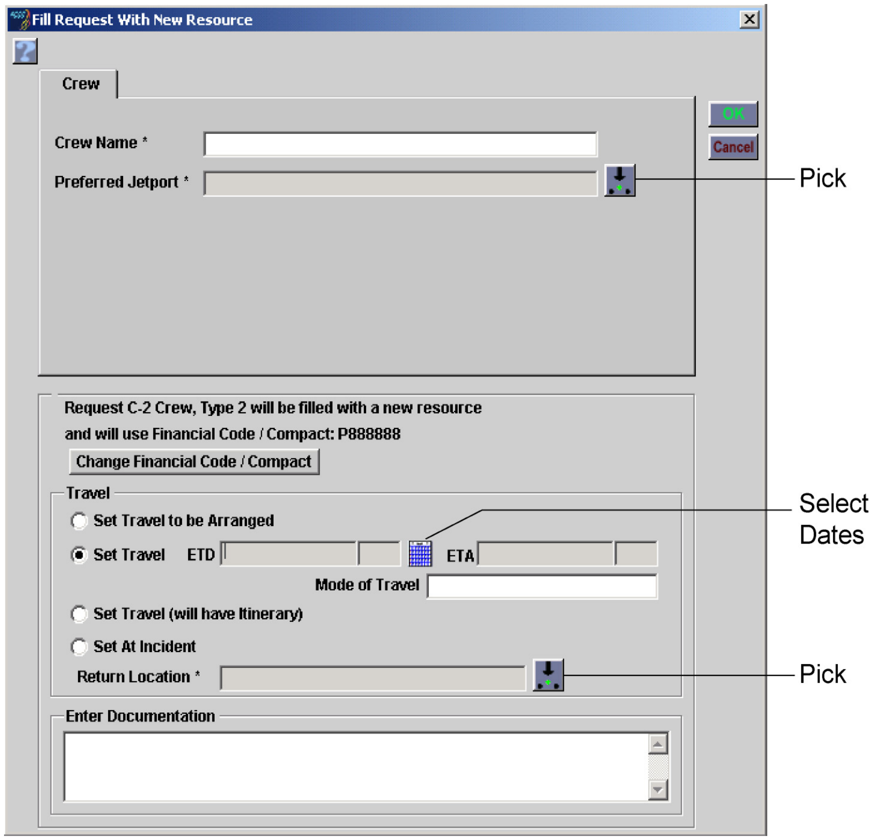
To fill the Pending Request with a new resource

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Action** button, and then click to select **Fill with New Resource**.

3 On the **Fill Request With New Resource** dialog box, complete the information as appropriate, and then click **OK**.

The following diagram shows the Crew tab on the Fill Request With New Resource dialog box.



The Fill Request With New Resource dialog varies according to the type of resource item you are creating. For specific information about a resource item, see "Resource Item - working with resources."

Creating a manifest

You can create a manifest for Call When Needed (CWN) resources and for requests filled with status-only or external resources. A manifest lists positions associated with a request and may also include the names of resources assigned to the positions. A manifest is associated with the request, not the resource used to fill the request.

Unlike a roster, you cannot save a manifest for use on another request. However, if the resource is reassigned, you can transfer the manifest to the new request.

To create a manifest

You can also create a manifest by clicking the Create Manifest button on the Fill Request dialog box.

1 On the **Fill with External Resource** dialog box, click the **Create Manifest** button.

2 To add a new position to the manifest, click **New** on the **Manifest** dialog box.

3 On the **Add Position(s)** dialog box, click the **Catalog** drop-down arrow and then click to select the **Catalog** of your choice.

4 Click the **Category** drop-down arrow, click to select the **Category** of your choice, complete other filter criteria as appropriate to narrow your search, and then click the **Filter** button.

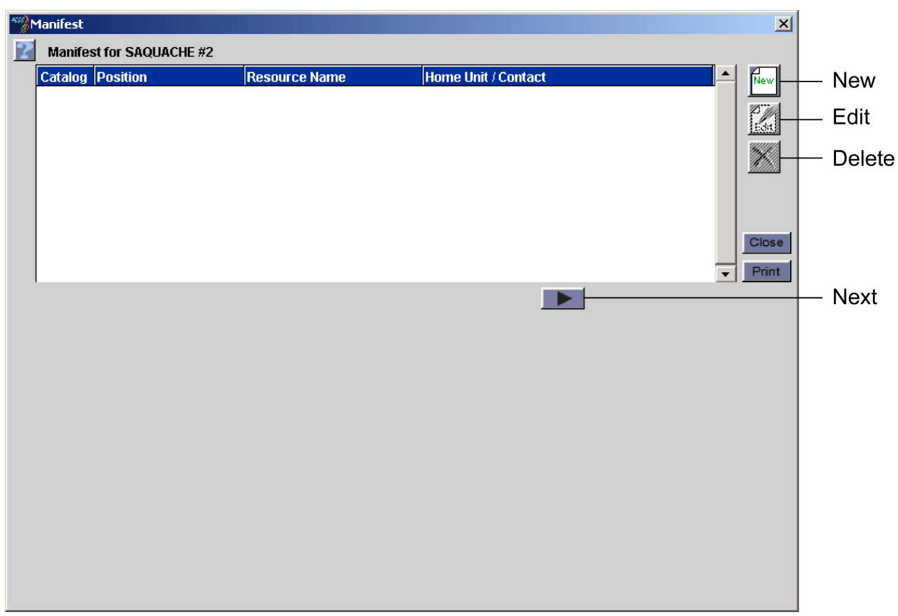
5 Click to select the **Catalog Item** of your choice, and then complete the following boxes, if appropriate, and then click **OK**

- # Positions
- Qualification Type.

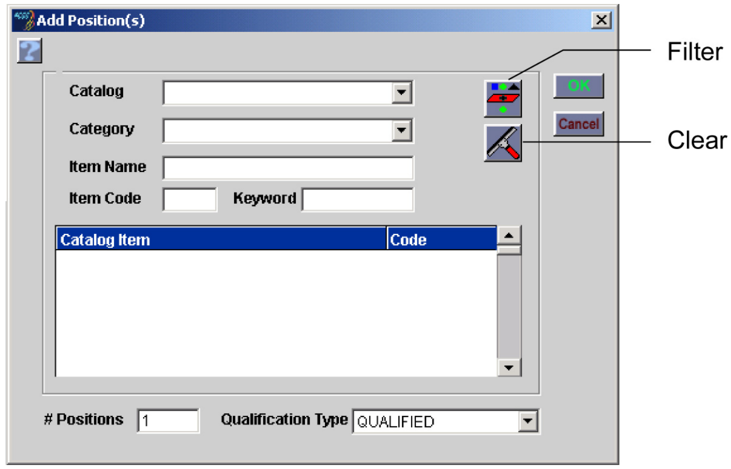
6 Continue adding positions to the Manifest, as appropriate.

7 When finished, click **Close**.

The following diagram shows the Manifest dialog box as it first appears on your screen and a Manifest has not yet been created for the request.



The following dialog box shows the Add Position(s) dialog box.



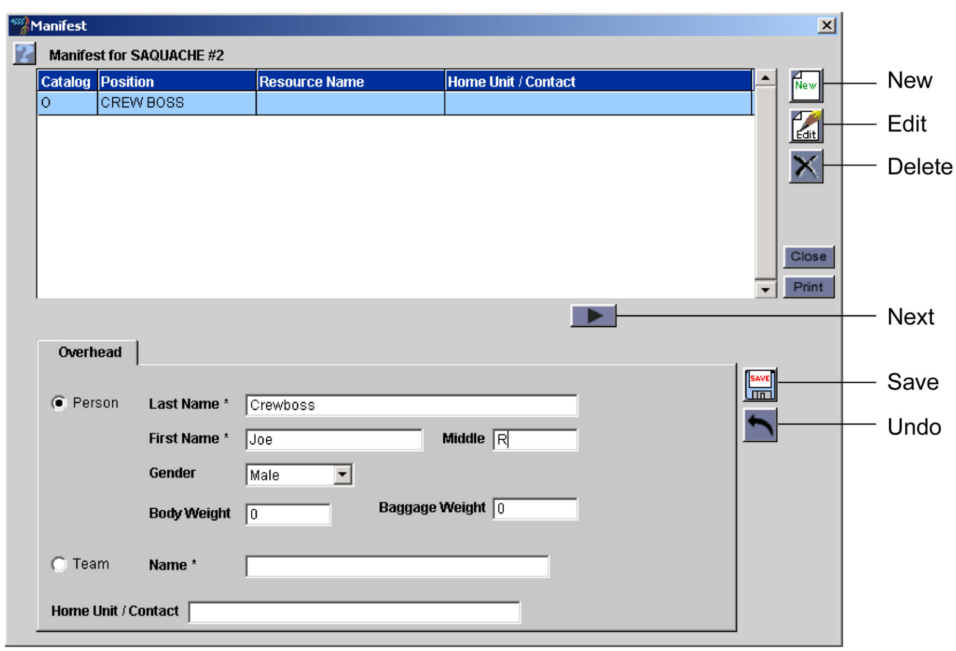
To assign a resource to a manifest position

1. On the **Manifest** dialog box, click to select the **Position** of your choice.
2. Complete the remaining boxes on the tab as appropriate for that **Position**, and then click **Save**.

The tab that displays is based on the Catalog of the position you selected.

3. To print the manifest, click **Print**.
4. When finished, click **Close**.

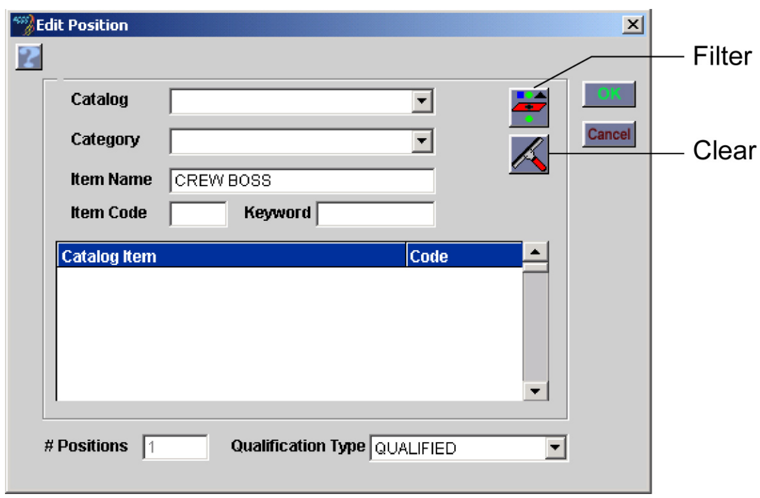
The following diagram shows the Manifest dialog box after a position is added to the manifest. In this example, the Overhead tab allows you to assign a resource or team to a Crew Position.



To edit a manifest position

1. On the **Fill with External Resource** dialog box, click the **Create Manifest** button.
2. On the **Manifest** dialog box, click to select the manifest **Position** of your choice, and then click **Edit**.
3. On the **Edit Position** dialog box, click the **Catalog** drop-down arrow and then click to select the **Catalog** of your choice.
4. Click the **Category** drop-down arrow, click to select the **Category** of your choice, complete other filter criteria as appropriate to narrow your search, and then click the **Filter** button.
5. Click to select the **Catalog Item** of your choice, and then complete the following boxes, if appropriate, and then click **OK**
   - # Positions
   - Qualification Type.

The following diagram shows the Edit Position dialog box.



To delete a manifest position

1. On the **Fill with External Resource** dialog box, click the **Create Manifest** button.
2. On the **Manifest** dialog box, click to select the manifest **Position** of your choice, and then click **Delete**.
3. On the **Confirm Deletion** dialog box, click **Yes** to confirm or click **No** to cancel.

Placing Pending Requests to status-only or external dispatch units

This section explains how to place Pending Requests with a status-only or a non-ROSS dispatch unit. You can externally place requests, subordinate requests, and support requests, as well as requests that were placed with your organization.

To place a Pending Request status-only or external

Before placing the Pending Request status-only or external, print the request so that you may fax or physically deliver the externally placed request to the non-ROSS unit.

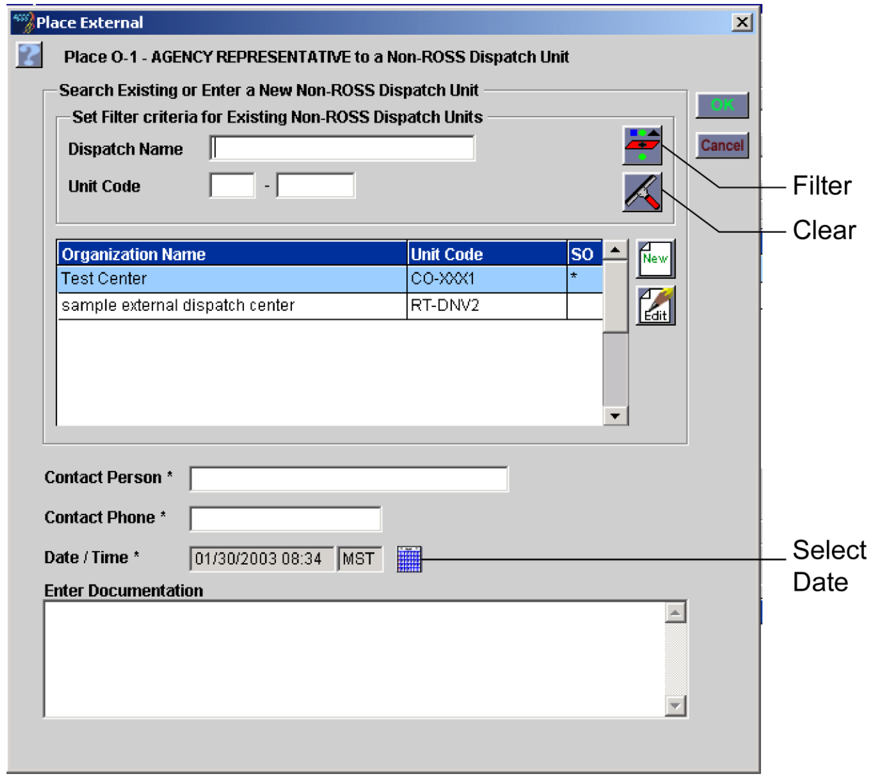
1. On the **Pending Request** screen, click to select the **Pending Request** of your choice.
2. Click the **Action** button, and then click to select **Place Status-Only/ External**.
3. On the **Place External** dialog box, search for and then select the **Dispatch Name** of your choice.

   To create a new non-ROSS dispatch unit, see the next task, "To create a new non-ROSS dispatch unit from the Place External dialog box."

4. In the **Contact Person** box, type the name of the **Contact Person** at the external dispatch office.
5. In the **Contact Phone** box, type the telephone number of that contact person.
6. To change the **Date/Time**, click the **Select Date** button, and then click to select the new **Date/Time** of your choice.
7. When finished, click **OK**.

   Once you place a Pending Request status-only or external, you must click to select the ***Placed Status-Only and External Only*** *check box on the* ***Pending Request*** *screen to perform actions on that request including View, Fill, and UTF! For more information, see the next task, "To review a Pending Request that was placed external."*

The following diagram shows the Place External dialog box.



To review a Pending Request that was placed externally

1 On the **Pending Request** screen under **Set Filter Criteria for Pending Requests**, click the **Placed Status-Only and External Only** check box.

2 Search for and then click to select the **Pending Request** of your choice.

To create a new non-ROSS dispatch unit from the Place External dialog box

1 On the **Place External** dialog box, click **New**.

2 On the **New Non-ROSS Organization** dialog box, type the name of the new dispatch unit in the **Dispatch Name** box, and then type the new unit code in the **Unit Code** box.

3 To add contact information, click **New**, complete the following information as appropriate

- Contact Method
- Priority
- Entry.

4 To add another contact, click the **Apply** button, and then click **OK** when finished.

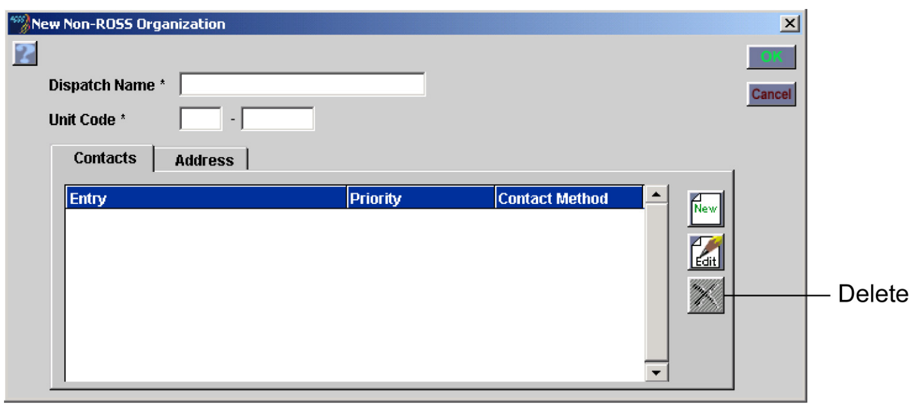
5 To add address information, click the **Address** tab, click **New**, complete the following information as appropriate

- Type
- Street 1
- Street 2
- City
- State
- Zip Code
- Country.

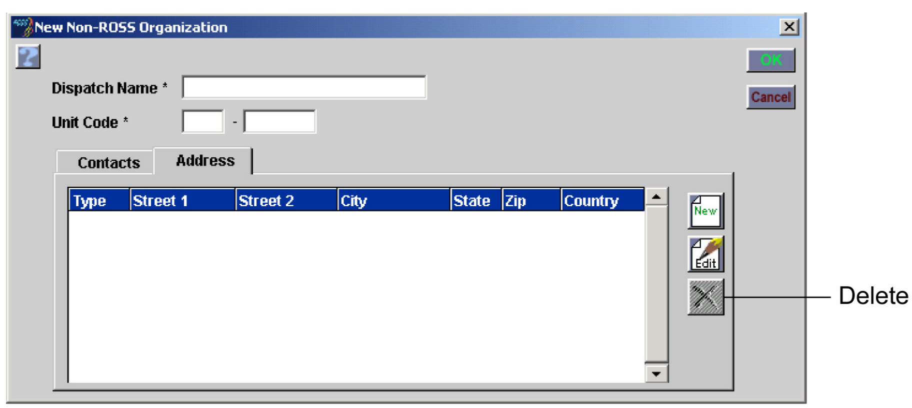
6 To add another address, click the **Apply** button, and then click **OK** when finished.

For more information about completing contact and address information, see "To add new contact information" and "To add new address information," in the section "Creating an External Incident," in the previous chapter, "Incidents - managing incidents and initial reports."

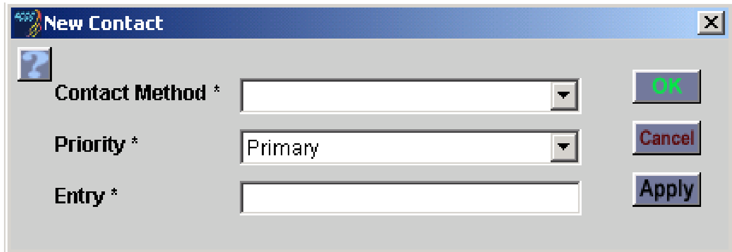
The following diagram shows the Contacts tab on the New Non-ROSS Organization dialog box.



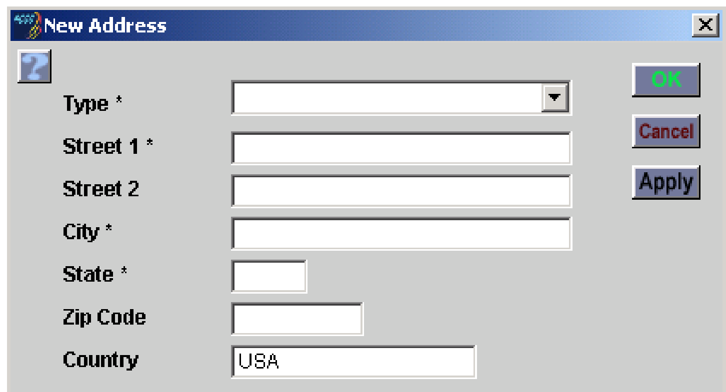
The following diagram shows the Address tab on the New Non-ROSS Organization dialog box.



The following diagram shows the New Contact dialog box.



The following diagram shows the New Address dialog box.



To continue an assignment roster

This task applies to configuration requests that already have an assignment roster initiated, but do not have the root request set as filled.

1. On the **Pending Request** screen, click to select the **Pending Request** of your choice.
2. Click the **Action** button, and then click to select **Continue Assignment Roster**.

For more information about rosters and assigning resources, see "Roster - managing subordinate requests," in this ROSS User's Guide.

To cancel an assignment roster

This task applies to configuration requests that already have an assignment roster initiated and have an assignment roster position created.

1. On the **Pending Request** screen, click to select the **Pending Request** of your choice.
2. Click the **Action** button, and then click to select **Cancel Assignment Roster**.

3 On the **Request Action Message** dialog box, click **Yes** to confirm or click **No** to cancel.

For more information about rosters and assigning resources, see "Roster - managing subordinate requests," in this ROSS User's Guide.

To refill a subordinate request

This task applies to subordinate requests that have been "unfilled" on the Request Status screen.

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Action** button, and then click to select **Refill Subordinate Request**.

For more information about subordinate requests, see "Roster - managing subordinate requests," in this ROSS User's Guide.

Viewing request details

The View button allows you to review details about the resource, including:

- view incident details
- view the request
- view information about the requesting unit
- view any associated requests
- view configuration/selected items.

You cannot edit information displayed from the View button.

To view request details

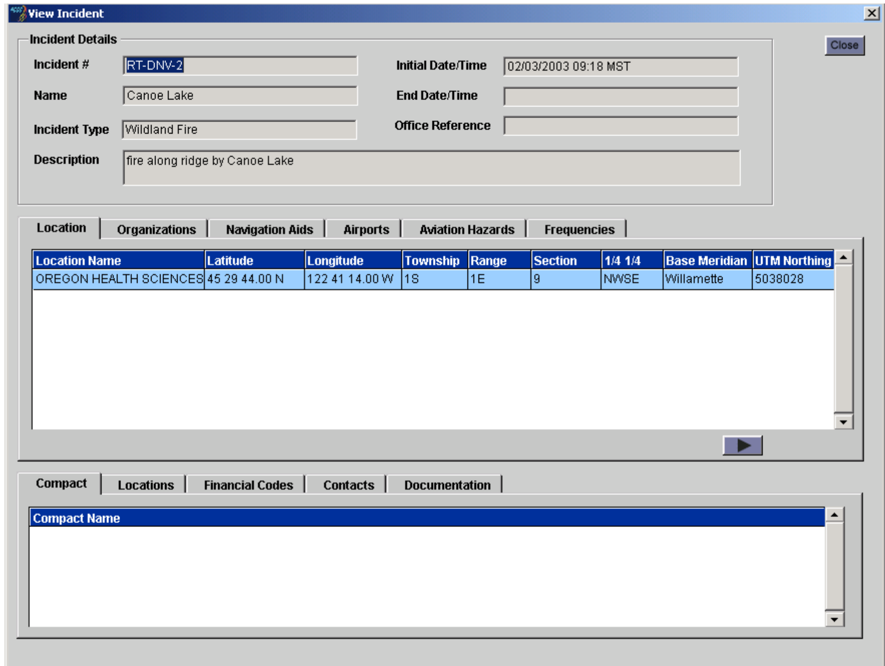
1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **View** button, and then click to select one of the following options

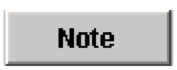
- View Incident
- View Request
- View Requesting Unit
- View Associated Requests - *applies only to requests that have associated requests*
- View Configuration/Selected Items.

3 When finished reviewing the information, click **Close**.

The following diagram shows the View Incident dialog box.



Using the Note button



The Note button allows you to place a "Check Availability" or "Hold Request" designation in the Note column for a Pending Request, or clear an existing note.

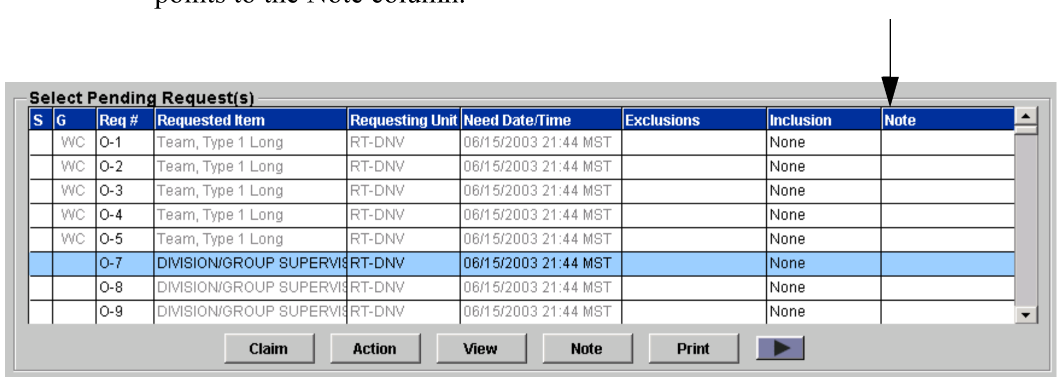
The Note column retains only one Note at a time.

To clear a note from a Pending Request

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Note** button, and then click to select **Clear**.

The following diagram shows the Select Pending Request(s) table. The arrow points to the Note column.

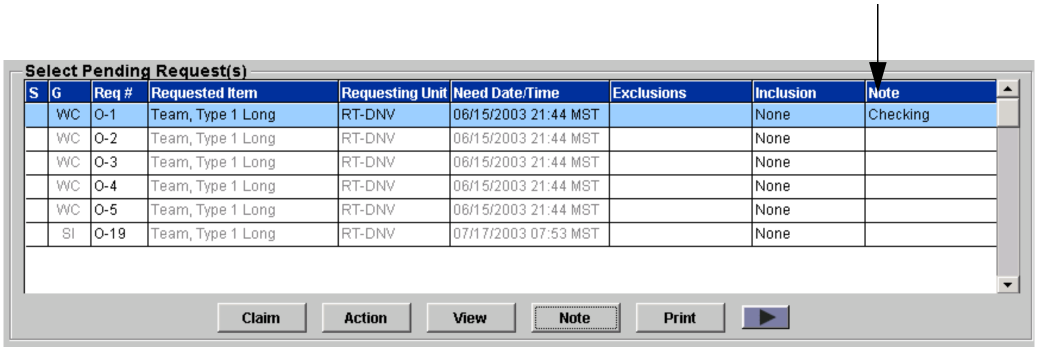


To place a Check Availability note on a Pending Request

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Note** button, and then click to select **Check Availability**.

The following diagram shows the Select Pending Request(s) table. The arrow points to the Check Availability note.


Select Pending Request(s)

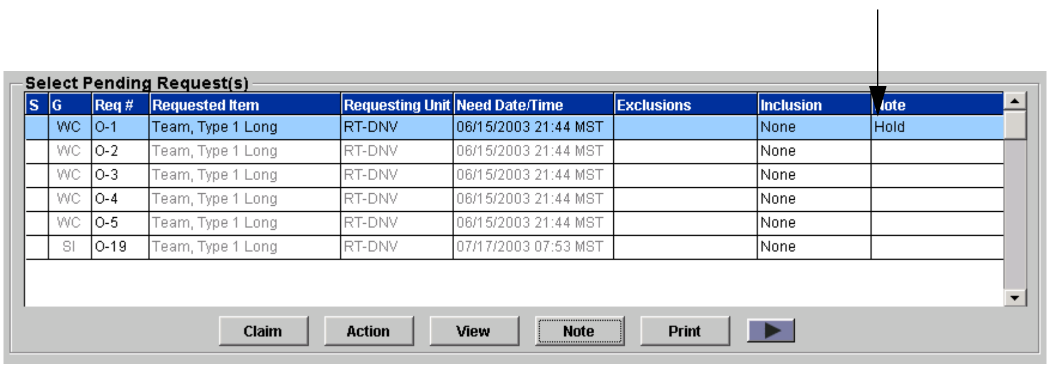
S	G	Req #	Requested Item	Requesting Unit	Need Date/Time	Exclusions	Inclusion	Note
	WC	O-1	Team, Type 1 Long	RT-DNV	06/15/2003 21:44 MST		None	Checking
	WC	O-2	Team, Type 1 Long	RT-DNV	06/15/2003 21:44 MST		None	
	WC	O-3	Team, Type 1 Long	RT-DNV	06/15/2003 21:44 MST		None	
	WC	O-4	Team, Type 1 Long	RT-DNV	06/15/2003 21:44 MST		None	
	WC	O-5	Team, Type 1 Long	RT-DNV	06/15/2003 21:44 MST		None	
	SI	O-19	Team, Type 1 Long	RT-DNV	07/17/2003 07:53 MST		None	

To place a Hold Request note on a Pending Request

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice.

2 Click the **Note** button, and then click to select **Hold Request**.

The following diagram shows the Select Pending Request(s) table. The arrow points to the Hold Request note.


Select Pending Request(s)

S	G	Req #	Requested Item	Requesting Unit	Need Date/Time	Exclusions	Inclusion	Note
	WC	O-1	Team, Type 1 Long	RT-DNV	06/15/2003 21:44 MST		None	Hold
	WC	O-2	Team, Type 1 Long	RT-DNV	06/15/2003 21:44 MST		None	
	WC	O-3	Team, Type 1 Long	RT-DNV	06/15/2003 21:44 MST		None	
	WC	O-4	Team, Type 1 Long	RT-DNV	06/15/2003 21:44 MST		None	
	WC	O-5	Team, Type 1 Long	RT-DNV	06/15/2003 21:44 MST		None	
	SI	O-19	Team, Type 1 Long	RT-DNV	07/17/2003 07:53 MST		None	

Printing Pending Requests

The Print button allows you to print a hardcopy of the Pending Request using the commercial software Brio.Quickview.

For more information about using Brio.Quickview, see “To print a report.” For more information about downloading Brio.Quickview, see “To install Brio.Quickview on your personal computer.” Both tasks are located in the chapter, “Reports - generating and printing reports,” earlier in this ROSS User’s Guide.

To print a Pending Request

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice, and then click the **Print** button.

2 On the **Brio menu bar**, click the **Print** icon, or click **Print** on the **File** menu.

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

Working with the Select Action for Pending Request tabs

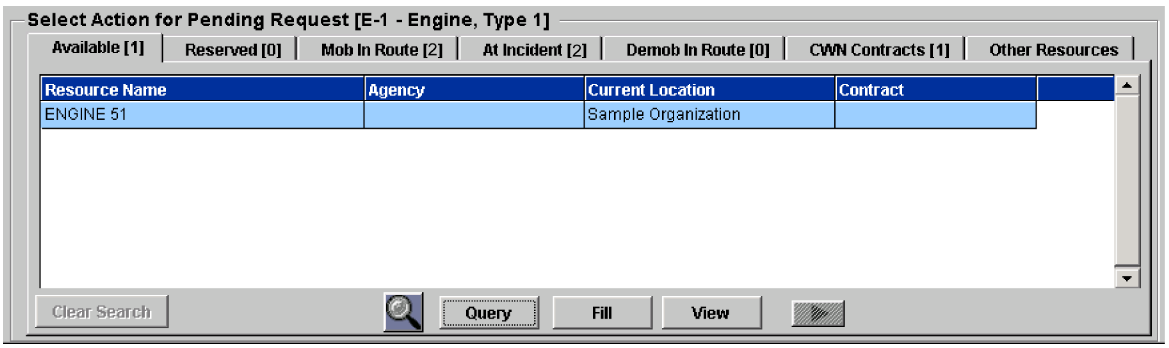
Resources available to fill pending requests are organized and listed on seven tabs, which are located on the Select Action for Pending Request section of the Pending Request screen. These seven tabs include:

- **Available**. The resource is not committed to an Incident. You are its home dispatch unit. Includes exclusive use contracted resources or pre-position dispatch.
- **Reserved**. The resource has been assigned to an Incident, but whose ETD has not yet passed. You are at its current dispatch unit. Includes reassigned or pre-positioned resources that your dispatch center has control of, but is not the home dispatch.
- **Mob In Route**. The resource is in route to an Incident. Any dispatch center in the ordering chain of the request may reassign from the Mob In Route tab.
- **At Incident**. The resource is at the Incident.
- **Demob In Route**. The resource is demobilizing from an Incident. Any dispatch center in the ordering chain of the request may reassign from the Demob In Route tab.
- **CWN Contracts**. The resource is directly accessed by you through a non-exclusive-use CWN contract. The CWN Contracts tab displays two options for displaying CWN contracts. To display only local CWN contracts, click **Local**. To display all CWN resources with global availability that are on contracts to other dispatch centers, click **All Resources**.

- **Other Resources**. The resource is available from your child organizations or from organizations in your Selection Area (for local Incidents only). For requests placed with you from another organization (non-local Incident), the Other Resources tab displays the child organizations, whether they have an available resource or not. The Other Resources tab does not display the number of available resources. To show the number of available resources on this tab, click the **Show Resource Counts** check box.

Except for the Other Resources tab, resources in an unavailability period, after a deactivation date, or do not match the features do not display on these tabs

For example, the following diagram shows the following resources: 1-Available, 0-Reserved, 2-Mob In Route, 2-At Incident, 0-Demob In Route, and 1-CWN Contracts.



The Fill/Reassign/Action button that displays on the screen is based on the tab you select:

*- The **Fill** button displays for the Available, Reserved, and CWN Contracts tabs.*

*- The **Reassign** button displays for the Mob in Route, At Incident, and Demob in Route tabs.*

*- The **Action** button displays for the Other Resources tab.*

To update the Select Action tabs to reflect current resource numbers

- On the **Pending Request** screen, click **Filter**.

To display current resource information

You must click the Query button every time you access a different Pending Request to update resource information on the Available tab. *For other tabs, clicking the **Query** button ensures that ROSS displays the most current information.*

- On the **Pending Request** screen, click to select the **Pending Request** of your choice, and then click the **Query** button.

To search for specific resource information

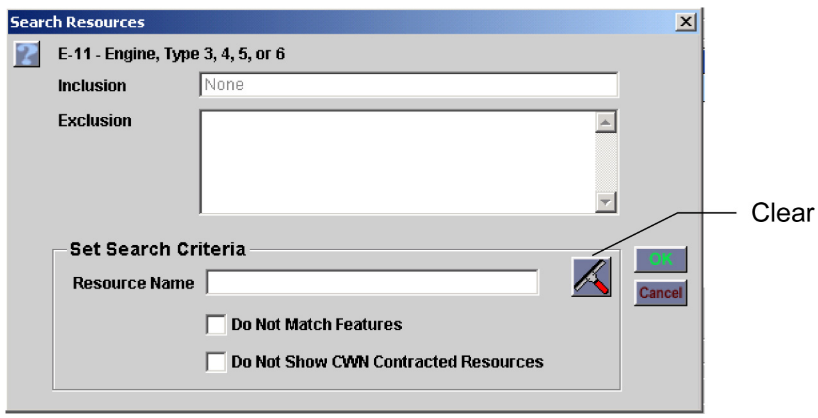
For more information about searching for Overhead resources, see the next task, "To search for specific Overhead resource information." For more information about searching for Service resources, see "Working with the Services tab," later in this chapter.

1 On the **Pending Request** screen under **Select Action for Pending Request**, click the **resource status** tab of your choice, and then click the **Search** button.

*The **Search** button is not available on the **Other Resources** tab.*

2 On the **Search Resources** dialog box, complete the **Set Search Criteria** as appropriate for that resource, and then click **OK**.

The following diagram shows the Search Resources dialog box for aircraft, crews, and equipment.



To search for specific Overhead resource

This task allows you to search for a specific person, regardless of qualifications.

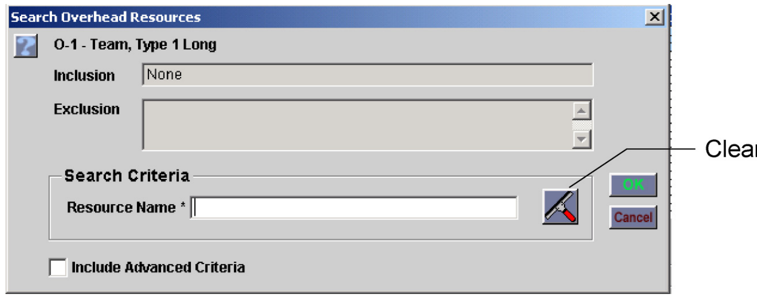
1 On the **Pending Request** screen, click the **Request #** drop-down arrow, click to select **O** (Overhead), and then click the **Filter** button.

2 Under **Select Pending Request(s)**, click to select the **Requested Items** of your choice.

3 Under **Select Action for Pending Request**, click the **resource status** tab of your choice, and then click the **Search** button.

4 On the **Search Overhead Resources** dialog box, type the name of the person in the **Resource Name** box, and then click **OK**.

The following diagram shows the Search Overhead Resources dialog box.



To search for Overhead resource information - advanced criteria

1 On the **Pending Request** screen, click the **Request #** drop-down arrow, click to select **O** (Overhead), and then click the **Filter** button.

2 Under **Select Pending Request(s)**, click to select the **Requested Items** of your choice.

*To select more than one request at a time, press and hold [Ctrl], and then click to select the **Requested Items** of your choice.*

3 Under **Select Action for Pending Request**, click the **resource status** tab of your choice, and then click the **Search** button.

4 On the **Search Overhead Resources** dialog box, click to select the **Include Advanced Criteria** check box.

5 On the **Search Overhead Resources** dialog box, complete the following information as appropriate to narrow your search

- Resource Name

*You can only search using Resource Name for available resources qualified for the position. Otherwise, type * (wildcard).*

- Category
- Catalog Item
- Mnemonic/NFES Code
- Catalog Item.

To search for a specific resource who is not qualified for the position, you must know for which positions that resource is qualified, perform the search, and then determine if that specific resource is available.

6 To expand the search to include resources that do not match the features requested on the request, click to select the **Do Not Match Features** check box.

7 To specify that an Emergency Firefighter or Administratively Determined resource is acceptable, click the **Include EFF/AD Resources** check box.

8 To exclude CWN contracted resources from the search, click to select the **Do Not Show CWN Contracted Resources** check box.

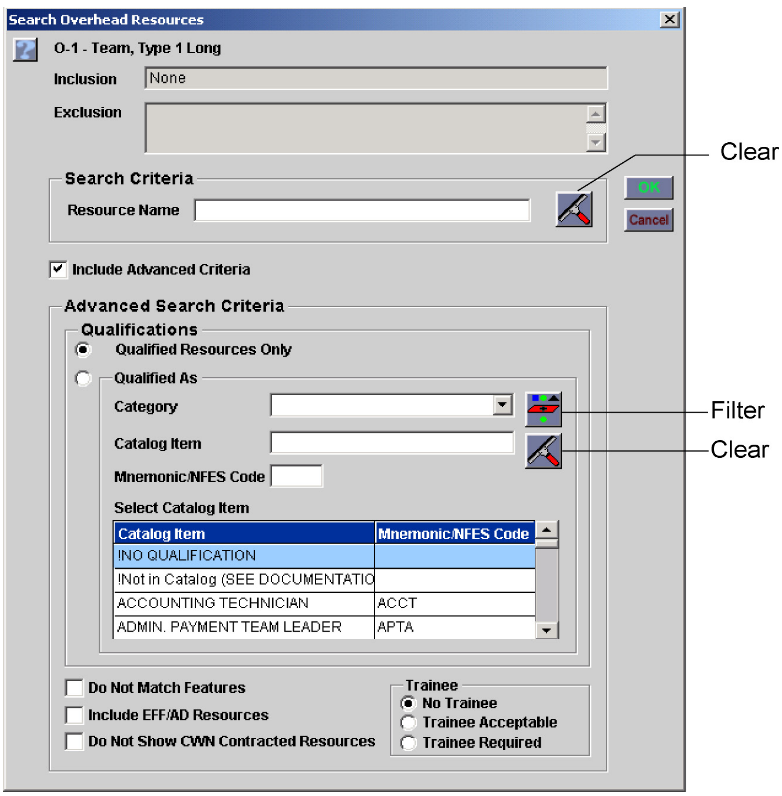
Selecting this check box removes the ***CWN Contracts*** *tab, under* ***Select Action for Pending Request****, from the* ***Pending Request*** *screen*

9 Under **Trainee**, click to select one of the following

- No Trainee
- Trainee Acceptable
- Trainee Required.

10 When finished completing your search criteria, click **OK**.

The following diagram shows the Search Overhead Resources dialog box, including advanced criteria.



To remove search criteria from resources displayed on the Select Action for Pending Request tabs

Remember to click the ***Clear Search*** *button to display the complete list of resources available to fill the selected request.*

1 On the **Pending Request** screen under **Select Action for Pending Request**, click the resource status tab of your choice, and then click the **Clear Search** button.

2 Click the tab of your choice, and then click the **Query** button.

Using the Fill button for non-configuration requests

The Fill button allows you to fill non-configuration requests for Available, Reserved, or CWN resources.

For more information about filling configuration requests, see "Filling configuration requests," later in this chapter.

To fill a Pending Request with an available resource

1. On the **Pending Request** screen, click to select the **Pending Request** of your choice and then click the **Query** button.
2. On the **Available** tab, click to select the **Resource Name** of your choice, click the **Fill** button, and then click to select **Fill**.
3. On the **Fill Request** dialog box, click to select the **Travel** option of your choice.

   For more information about setting resource travel, see "Setting resource travel from the Pending Request screen," later in this section.

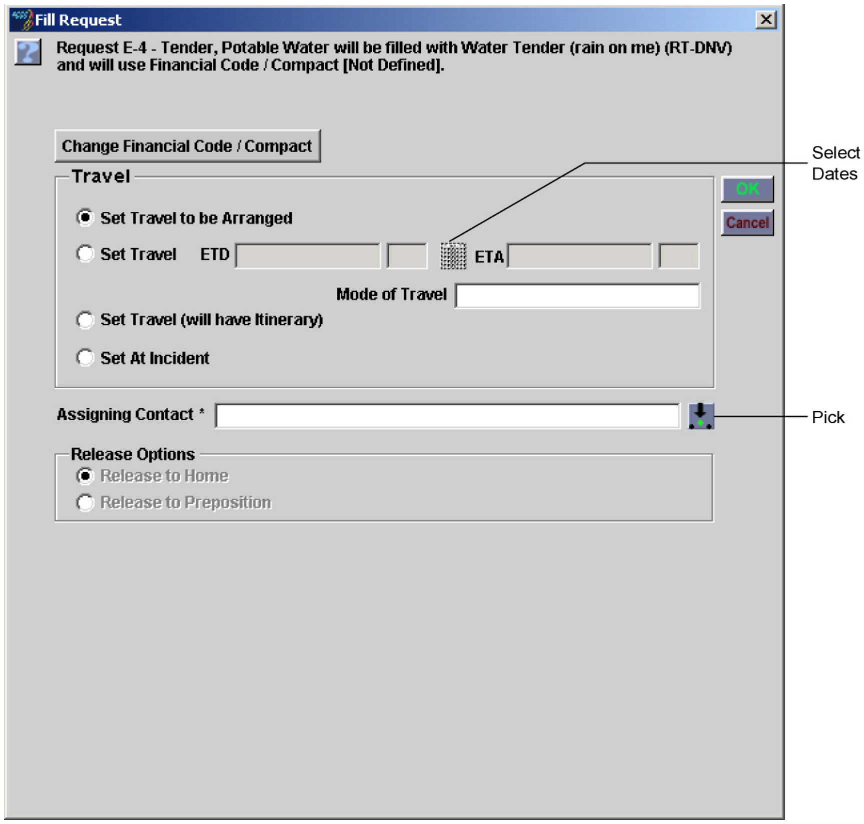
4. In the **Assigning Contact** box, type the contact individual or position name, and contact phone number for information about the resource, or click **Pick** to select from an existing contact list.

   The Current Assigning Contact is not applicable on the Pending Request screen.

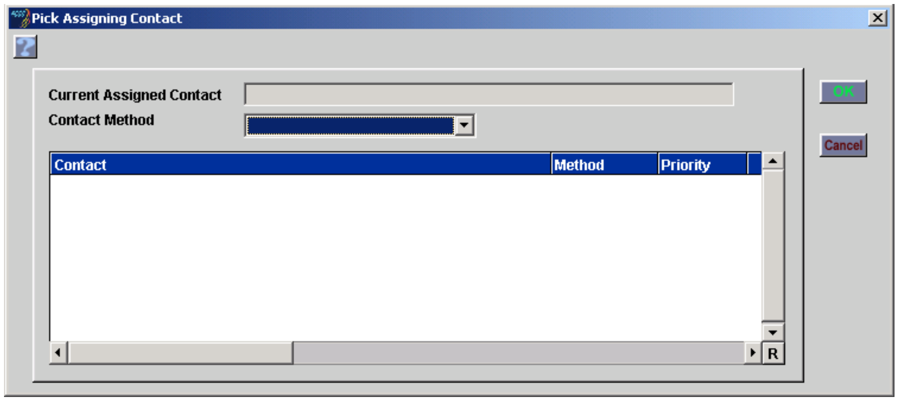
5. If the resource you select is pre-positioned, under **Release Options**, click to select either **Release to Home** or **Release to Preposition**.
6. When finished, click **OK**.

   For more information about completing the Fill Request dialog box, see the previous task, "To fill a Pending Request with an Available resource."

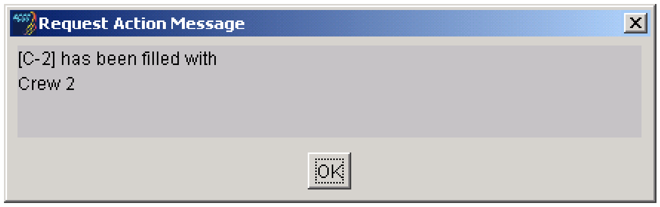
The following diagram shows the Fill Request dialog box.



The following diagram shows the Pick Assigning Contact dialog box.



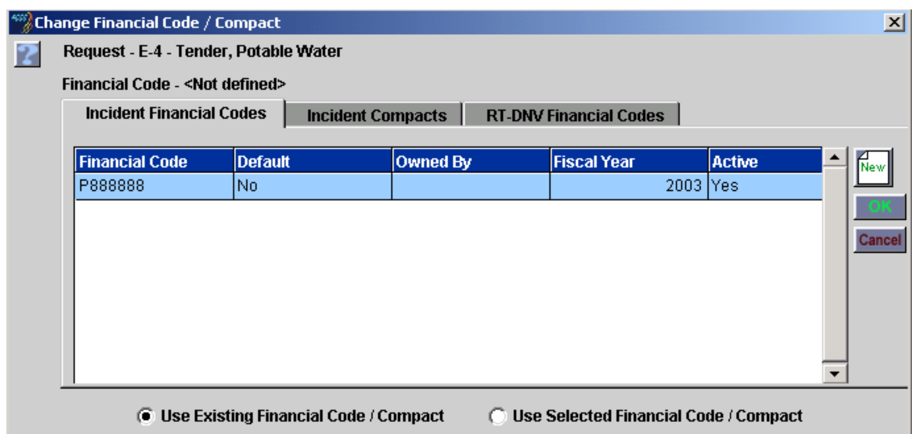
The following diagram shows the Request Action Message dialog box that displays when the Pending Request is filled.



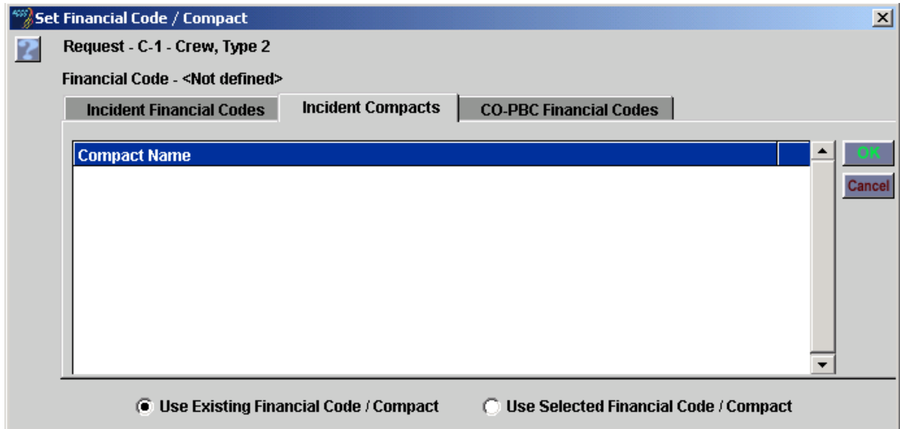
To change a financial code

1. On the **Fill Request** dialog box, click the **Change Financial Code / Compact** button.
2. To select a different financial code defined for the Incident, on the **Incident Financial Codes** tab, and then click to select the **Financial Code** of your choice.
3. To change the **Incident Compact**, click the **Incident Compacts** tab, and then click to highlight the **Compact Name** of your choice.
4. To select a different financial code from among those defined for your organization, perform the following
   - click the **[Unit] Financial Codes** tab
   - click the **Unit** drop-down arrow and select the **Unit** of your choice
   - click the **Year** drop-down arrow and select the **Year** of your choice
   - click to select the **Financial Code** of your choice
   - click **Use Selected Financial Code/Compact**.
5. When finished, click **OK**.

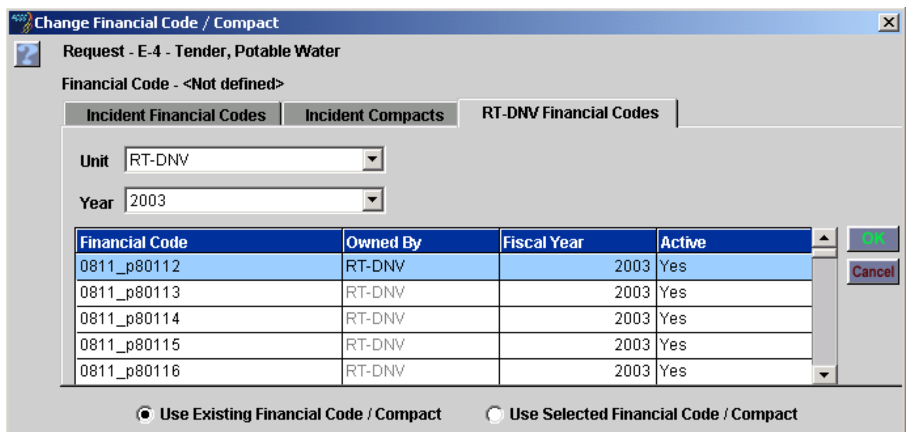
The following diagram shows the Incident Financial Codes tab on the Set Financial Code/Compact dialog box.



The following diagram shows the Incident Compacts tab on the Set Financial Code/Compact dialog box.



The following diagram shows the Dispatch Unit Financial Codes tab on the Set Financial Code/Compact dialog box.



To create a new Incident Financial Code

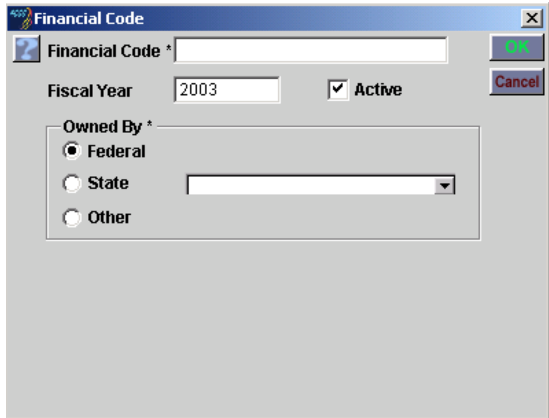
1 On the **Change Financial Code/Compact** dialog box on the **Incident Financial Codes** tab, click **New**.

2 On the **Financial Code** dialog box, complete the following information as appropriate, and then click **OK**.

- Financial Code
- Fiscal Year
- Active
- Owned By
- Owner Name.

3 To apply the new financial code to the request, on the **Change Financial Code/Compact** dialog box on the **Incident Financial Codes** tab, click to select the **Financial Code**, click to select **Use Selected Financial Code/ Compact**, and then click **OK**.

The following diagram shows the Financial Code dialog box.



To fill a Pending Request with a Reserved resource

When a request is filled using a resource from the Reserved tab, the request that originally reserved the resource will be UNFILLED. You must then perform one of the following:

- *if your organization generated the original request, then cancel that original request, place the request to another dispatch organization, or fill the original request with another resource*
- *if your organization did not generate the original request, fill the request with another resource, or UTF the original request back to the ordering unit.*

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice, click the **Reserved** tab, and then click the **Query** button.

2 On the **Reserved** tab, click to select the **Resource Name** of your choice, and then click the **Fill** button.

3 Complete the **Fill Request** dialog box as appropriate, and then click **OK**.

For more information about completing the Fill Request dialog box, see the previous task, "To fill a Pending Request with an Available resource."

To fill a Pending Request with a CWN resource

If filling a request with a pre-positioned CWN resource with a manifest, the manifest will be carried over to the non-pre-position Incident request. You can edit the manifest on the pre-positioned Incident request or the manifest on the non-prepositioned Incident request without affecting the other.

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice, click the **CWN** tab, and then click the **Query** button.

2 On the **CWN** tab, click either **Local** or **All Resources**, click to select the **Resource Name** of your choice, and then click the **Fill** button.

*Click the **All Resources** button to display resources that you do not have a CWN contract with, but that have been marked "Global" on the Contract screen.*

3 Complete the **Fill Request** dialog box as appropriate, and then click **OK**.

Setting resource travel from the Pending Request screen

Whenever you fill a request, be sure to set the travel for the resource. This will allow you to automatically document the resource's travel without accessing the Travel screen.

To set resource travel if the resource is already at the Incident

1 On the **Pending Request** screen, select the **Pending Request** of your choice, and then click the **Query** button.

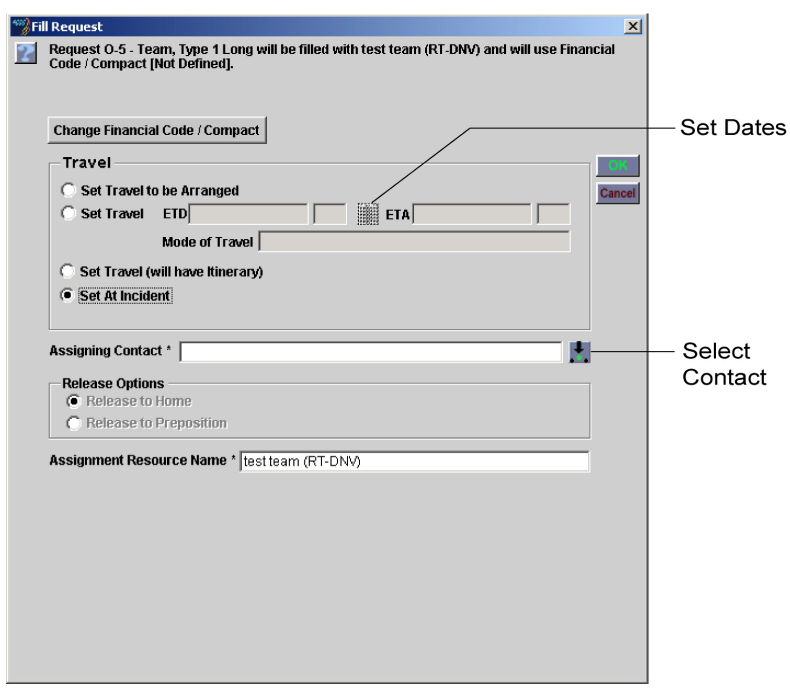
2 Select the **Resource Name** of your choice, and then click the **Fill** button.

3 On the **Fill Request** dialog box, click to select **Set at Incident**.

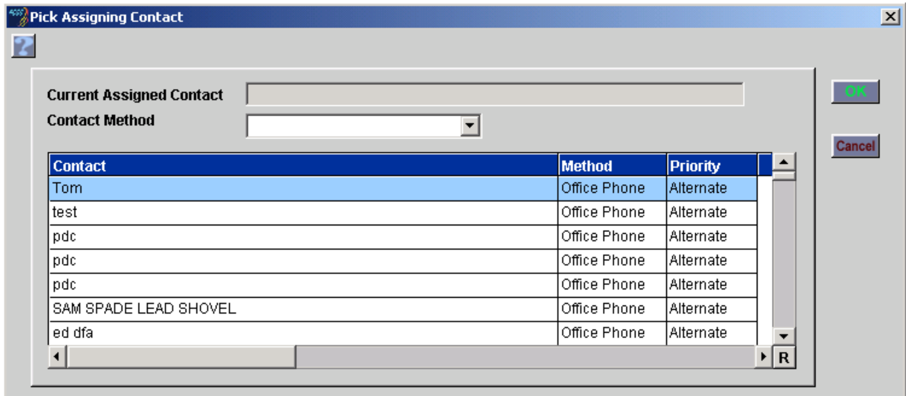
4 Click the **Select Contact** button, and then click to select the **Contact** of your choice on the **Pick Assigning Contact** dialog box.

5 For pre-positioned resources, under **Release Options**, click to select the **Release Option** of your choice, type the **Assignment Resource Name** in the **Assignment Resource Name** box, and then click **OK**.

The following diagram shows the Fill Request dialog box for the Set At Incident option.



The following diagram shows the Pick Assigning Contact dialog box.



To set resource travel if the resource does not need a detailed travel itinerary

1 On the **Pending Request** screen, select the **Pending Request** of your choice, and then click the **Query** button.

2 Select the **Resource Name** of your choice, and then click the **Fill** button.

3 On the **Fill Request** dialog box, click to select **Set Travel**, and then click the **Set Dates** button.

4 On the **Calendar**, click to select the **ETD** and **ETA** of your choice, and then type the **Mode of Travel** in the **Mode of Travel** box.

5 Click the **Select Contact** button, and then click to select the **Contact** of your choice on the **Pick Assigning Contact** dialog box.

6 For pre-positioned resources, under **Release Options**, click to select the **Release Option** of your choice, type the **Assignment Resource Name** in the **Assignment Resource Name** box, and then click **OK**.

To set resource travel if the resource needs a detailed travel itinerary

1 On the **Pending Request** screen, select the **Pending Request** of your choice, and then click the **Query** button.

2 Select the **Resource Name** of your choice, and then click the **Fill** button.

3 On the **Fill Request** dialog box, click to select **Set Travel (will have Itinerary)**.

4 Click the **Select Contact** button, and then click to select the **Contact** of your choice on the **Pick Assigning Contact** dialog box.

5 Under **Release Options**, click to select the **Release Option** of your choice, type the **Assignment Resource Name** in the **Assignment Resource Name** box, and then click **OK**.'

6 On the **Travel** menu, click **Travel** or click the **TL** button.

7 On the **Travel** screen, click to select the **Travel (Itinerary)** tab, and then complete the itinerary as appropriate.

For more information about complete a Travel Itinerary, see "Travel - working with itineraries and travel plans," in this ROSS User's Guide.

Working with Mob In Route, At Incident, and Demob In Route resources

The Mob In Route, At Incident, and Demob tabs allow you to reassign resources in route, at the Incident, or demobilizing from one of your organization's Incidents. Remember these key points when reassigning these resources:

- When reassigning a Mob in Route resource to another request, the original request is unfilled and placed back in the "pending" queue of the organization that performed the reassignment. For a configuration request, the parent and all subordinate requests become "pending."
- When an organization performs a reassignment of a Mob in Route resource, all dispatch units that entered the ordering chain of the original request after the reassignment drop out of the ordering chain and receive a No Action notification message.
- When reassigning an At Incident resource to another request, you may cancel the reassignment if the resource is Mob in Route to the new assignment. You can cancel a reassignment from the Request Status screen.

For more information about completing the Reassign Resource dialog box, see the previous task, "To fill a Pending Request with an Available resource."

To reassign a Mob In Route resource

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice, click the **Mob In Route** tab, and then click the **Query** button.

2 On the **Mob In Route** tab, click to select the **Resource Name** of your choice, and then click the **Reassign** button.

3 Complete the **Reassign Resource** dialog box as appropriate, and then click **OK**.

To reassign an At Incident resource

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice, click the **At Incident** tab, and then click the **Query** button.

2 On the **At Incident** tab, click to select the **Resource Name** of your choice, and then click the **Reassign** button.

3 Complete the **Reassign Resource** dialog box as appropriate, and then click **OK**.

To reassign a Demob In Route resource

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice, click the **Demob At Route** tab, and then click the **Query** button.

2 On the **Demob In Route** tab, click to select the **Resource Name** of your choice, and then click the **Reassign** button.

3 Complete the **Reassign Resource** dialog box as appropriate, and then click **OK**.

Working with Other Resources

The Other Resources tab allows you to access resources from child organizations or from selection area organizations.

To Place Request for Other Resources

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice, click the **Other Resources** tab, and then click the **Query** button.

2 On the **Other Resources** tab, click to select the **Organization Name** of your choice.

3 To show the total number of available and reserved resources, click to select the **Show Resource Counts** check box.

4 Click to select one of the following options

- to display resources that are either government owned or vendor owned on an exclusive use contract with your organization, click to select **Government Controlled**
- to display vendor owned resources that are on a call when needed contract, click to select **Call When Needed**.

5 Click the **Action** button, and then click **Place Request**.

6 On the **ROSS Confirmation Message** dialog box, click **Yes,** and then click **OK** to confirm or click **No** to cancel.

Place Request Up for Other Resources

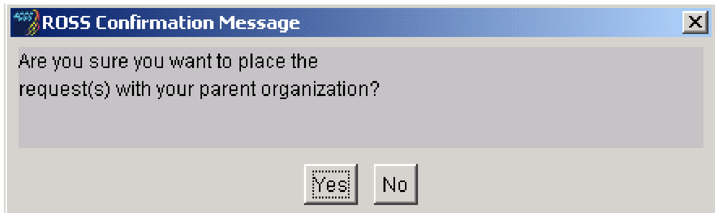
1 On the **Pending Request** screen, click to select the **Pending Request** of your choice, click the **Other Resources** tab, and then click the **Query** button.

2 On the **Other Resources** tab, click the **Action** button, and then click **Place Request Up**.

*You can also Place Up requests for Other Resources using the **Action** button that is located under the **Select Pending Request(s)** section of the Pending Request screen.*

3 On the **ROSS Confirmation Message** dialog box, click **Yes** and then click **OK** to confirm, or click **No** to cancel.

The following diagram shows a sample ROSS Confirmation Message dialog box.



The following diagram shows the corresponding sample Request Action Message dialog box.

To place Request Status-Only or External for Other Resources

*You can also place status-only and external requests for Other Resources using the **Action** button that is located under the **Select Pending Request(s)** section of the Pending Request screen.*

1 On the **Pending Request** screen, click to select the **Pending Request** of your choice and then click the **Other Resources** tab.

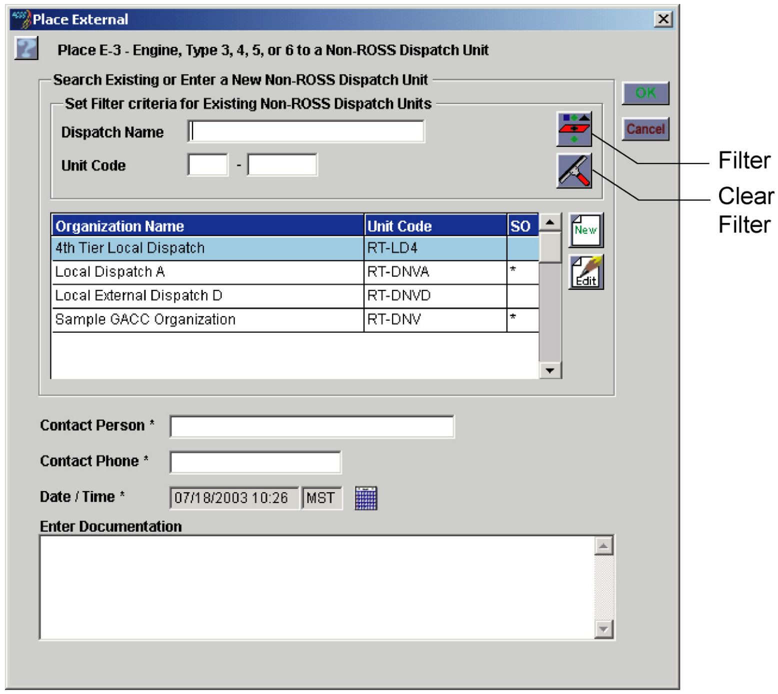
2 Click the **Action** button, and then click **Place Status-Only /External**.

3 On the **Place External** dialog box, search for and locate the **Organization Name** of your choice, type the **Contact Person** and **Contact Phone** in the appropriate boxes, and then click **OK**.

*If the dispatch organization you want is not listed, click the **New** button, and then create the dispatch organization. For more information, see "To create an external dispatch unit," in the section, "Creating an External Incident, in the chapter, "Incidents - managing incidents and initial reports."*

4 On the **Request Action Message** dialog box, click **OK.**

The following diagram shows the Place External dialog box.



The following diagram shows the Request Action Message dialog box.

Understanding pending requests with configurations

For pending requests with configurations, most of the Select Action for Pending Request tabs on the Pending Request screen work in the same manner as for pending requests without configurations. Review the following differences:

- **Available tab**. Filling a pending request with a configuration is significantly different than filling a pending request without one.
- **Reserved**, **Mob In Route**, **At Incident**, **Demob In Route tabs**. If committed to another Incident, reassigning the pending request with configuration resources will fill the root pending request and its corresponding subordinate requests.
- **CWN Contracts** and **Other Resources tabs**. Filling configuration pending requests for CWN Contracts and Other Resources is performed in the same manner as for pending requests without configurations.

Filling pending requests with configurations

This section explains how to fill pending requests with configurations using available resources. The Fill button on the Available tab identifies six options for filling configuration requests:

- **Fill with a single resource**. The root request is filled with the selected resource. No subordinate requests are generated.
- **Fill with an assignment roster using the master roster**. The root request is filled with the selected resource and the resource's roster displays on the Assignment Roster dialog box.
- **Fill with an assignment roster using a configuration**. The root request is filled with the selected resource and the requested catalog item configuration displays on the Assignment Roster dialog box. Only the first level of hierarchy beyond the root request is added to the Assignment Roster. If any catalog items of the configuration are also configurations, those catalog items are not added to the Assignment Roster.
- **Fill with an assignment roster (build from scratch)**. The root request is filled with the selected resource. All subordinate positions must be added from the Assignment Roster dialog box.
- **Fill with an assignment roster for selected items**.The root request is filled with the selected resource. The configuration catalog items selected when the request was created display on the Assignment Roster dialog box. If assigning a resource that has a roster to an Assignment Roster position, the resources assigned to the roster will not automatically be assigned to the Assignment Roster. That is, the resource's roster is ignored.

  This option is available for "SI" requests only.
- **Fill with a pre-positioned roster**. The root request is filled with the selected resource. The roster of that resource displays on the Assignment Roster dialog box. If assigning a resource that has a roster to an Assignment Roster position, the resources assigned to the roster will not automatically be assigned to the Assignment Roster. That is, the resource's roster is ignored. You cannot fill a group request with a pre-positioned group for which a subordinated request has already been created.

Configuration requests are designated by a "WC," "WO," or "SI" in the G column of the Select Pending Requests table.

To fill a configuration pending request with a single resource

This task applies only for WC (With Configuration) and WO (Without Configuration) requests.

1 On the **Request** menu, click **Pending Request**, or click the **PR** button.

2 On the **Pending Request** screen, search for and then click to select the configuration request of your choice.

3 On the **Available** tab, click **Query**.

4 Click the **Fill** button, and then click to select **Fill with Single Resource**.

5 On the **Fill Request** dialog box, click to select the **Travel** option of your choice.

*To set the departure and arrival times, click **Set Travel,** click the **Select Dates** button, and then click to select the **ETD** and **ETA** time and dates of your choice.*

6 In the **Assigning Contact** box, type the individual or position name to contact for information about the resource, or click **Pick** to select from an existing contact list.

The Current Assigning Contact is not applicable on the Pending Request screen.

7 If the resource you select is pre-positioned, under **Release Options**, click to select either **Release to Home** or **Release to Preposition**.

8 When finished, click **OK**.

To fill a configuration pending request with an assignment roster using the master roster

This task applies only for WC (With Configuration) and WO (Without Configuration) requests for which the selected resource has a roster.

1 On the **Request** menu, click **Pending Request**, or click the **PR** button.

2 On the **Pending Request** screen, search for and then click to select the configuration request of your choice.

3 On the **Available** tab, click **Query**.

4 Click the **Fill** button, and then click to select **Fill with Assignment Roster using Master Roster**.

5 Complete the **Assignment Roster** dialog box as appropriate, and then click **OK**.

For more information about completing the Assignment Roster dialog box, see the next section, "Understanding and working with Assignment Rosters."

To fill a configuration pending request with an assignment roster using a configuration

This task applies only for WC (With Configuration) and WO (Without Configuration) requests.

1. On the **Request** menu, click **Pending Request**, or click the **PR** button.
2. On the **Pending Request** screen, search for and then click to select the configuration request of your choice.
3. On the **Available** tab, click **Query**.
4. Click the **Fill** button, and then click to select **Fill with Assignment Roster using Configuration**.
5. Complete the **Assignment Roster** dialog box as appropriate, and then click **OK**.

   For more information about completing the Assignment Roster dialog box, see the next section, "Understanding and working with Assignment Rosters."

To fill a configuration pending request with an assignment roster (build from scratch)

This task applies only for WC (With Configuration) and WO (Without Configuration) requests.

1. On the **Request** menu, click **Pending Request**, or click the **PR** button.
2. On the **Pending Request** screen, search for and then click to select the configuration request of your choice.
3. On the **Available** tab, click **Query**.
4. Click the **Fill** button, and then click to select **Fill with Assignment Roster (build from scratch)**.
5. Complete the **Assignment Roster** dialog box as appropriate, and then click **OK**.

   For more information about completing the Assignment Roster dialog box, see the next section, "Understanding and working with Assignment Rosters."

To fill a configuration pending request with an assignment roster for selected items

This task applies only for SI (Selected Items) requests.

1. On the **Request** menu, click **Pending Request**, or click the **PR** button.

2 On the **Pending Request** screen, search for and then click to select the configuration request of your choice.

3 On the **Available** tab, click **Query**.

4 Click the **Fill** button, and then click to select **Fill with Assignment Roster for Selected Items**.

5 Complete the **Assignment Roster** dialog box as appropriate, and then click **OK**.

For more information about completing the Assignment Roster dialog box, see the next section, "Understanding and working with Assignment Rosters."

To fill a configuration pending request with a pre-positioned roster

This task applies only for pre-positioned resources. You can only change the Assignment Resource Name, not the Assignment Roster itself. You must accept the pre-positioned group "as is."

1 On the **Request** menu, click **Pending Request**, or click the **PR** button.

2 On the **Pending Request** screen, search for and then click to select the configuration request of your choice.

3 On the **Available** tab, click **Query**.

4 Click the **Fill** button, and then click to select **Fill with Pre-Positioned Roster**, and then click **OK**.

To change the Assignment Resource Name, see "To edit the Assignment Resource Name," in the next section, "Understanding and working with Assignment Rosters."

Understanding and working with Assignment Rosters

This section explains how to work with Assignment Rosters. Topics include:

- Using the Action button with Assignment Rosters
- Using the View button with Assignment Rosters
- Printing an Assignment Roster
- Adding/Swapping Assignment Roster resources.

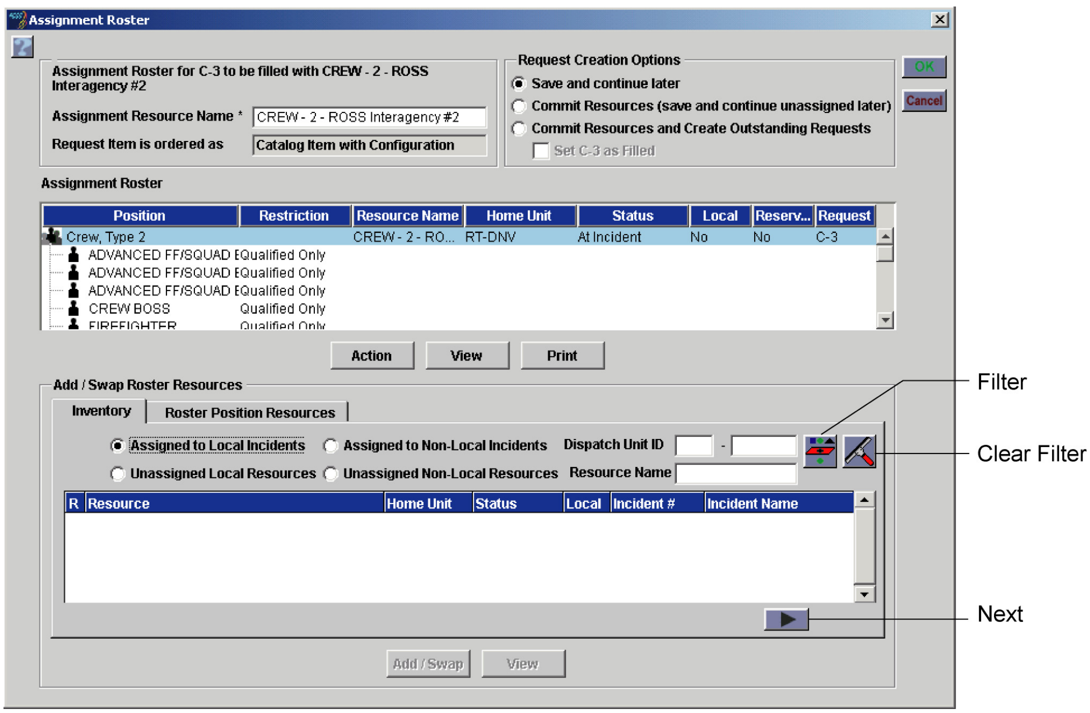
Whenever you want to stop working on an Assignment Roster and close the Assignment Roster dialog box, you must select from one of the following Request Creation Options:

- **Save and continue later.** Save the Assignment Roster as a work-in-progress. This option does not generate any requests, nor assigns resources other than to the root catalog item.

- **Commit Resources (save and continue unassigned later).** Commit assigned resources and save unassigned portions of the Assignment Roster as a work-in-progress.
- **Commit Resources and Create Outstanding Requests.** Commit assigned resources and create requests for unassigned items. The travel option you select applies to all Assignment Roster resources being assigned at that time. *Travel does not apply to requests that are placed to another dispatch unit or for unfilled requests that are placed on the Pending Request screens.*
- **Set [request number] as Filled.** Set the root request as "filled" and remove it from the Pending Request screen. *Applies only with "Commit Resources and Create Outstanding Requests."*

The Assignment Roster dialog box allows you to work with all configuration options except "Fill with Single Resource." Actions that appear dimmed are not available for the selected position on the Assignment Roster.

The following diagram shows the Assignment Roster dialog box.



Using the Action button with Assignment Rosters

The Action button on the Assignment Roster dialog box allows you to perform many Assignment Roster functions, including:

- editing the Assignment Resource Name
- adding a position to an Assignment Roster
- deleting a position from an Assignment Roster
- removing a resource from an Assignment Roster position
- changing a restriction of an Assignment Roster position

- deleting all positions from an Assignment Roster
- building an Assignment Roster from a configuration.

To edit the Assignment Resource Name

- On the **Assignment Roster** dialog box in the **Assignment Resource Name** box, type to replace the **Assignment Resource Name**, and then click **OK**.

To add a position to an Assignment Roster

You can only add a new position under a configuration.

1 On the **Assignment Roster** dialog box, click to select the **Position** under which you want to add the new position.

2 Click the **Action** button, and then click to select **Add Position**.

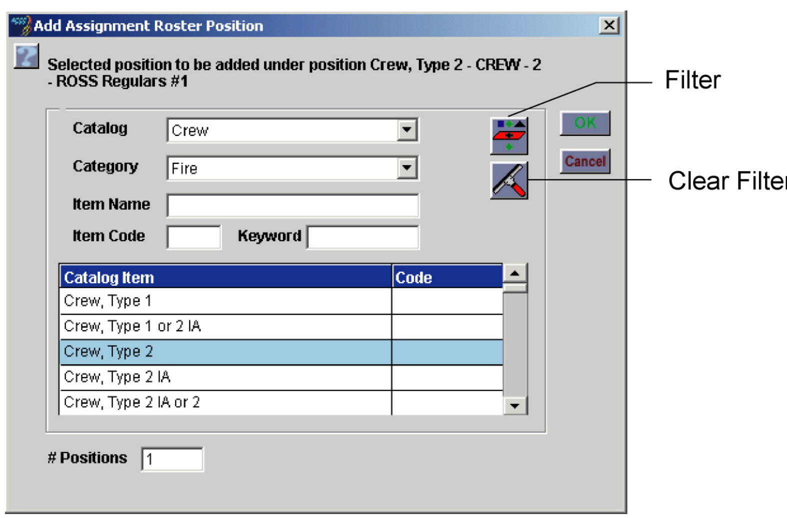
3 On the **Add Assignment Roster Position** dialog box, search for and then click to select the **Catalog Item** of your choice.

4 In the **# Positions** box, type the number of positions.

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

6 When finished, click **OK**.

The following diagram shows the Add Assignment Roster Position dialog box.



To delete a position from an Assignment Roster

You cannot delete a root position from an Assignment Roster.

1 On the **Assignment Roster** dialog box, click to select the **Position** you want to delete.

2 Click the **Action** button, and then click to select **Delete Position**.

To remove a resource from an Assignment Roster position

This task only applies to positions that have assigned resources.

1 On the **Assignment Roster** dialog box, click to select the **Position** from which you want to remove the resource.

2 Click the **Action** button, and then click to select **Remove Resource**.

To change a restriction of an Assignment Roster position

This task only applies to Overhead positions. If the position has a resource already assigned, you cannot change the restriction to a level that the resource cannot meet.

1 On the **Assignment Roster** dialog box, click to select the **Position** for which you want to change the restriction.

2 Click the **Action** button, and then click to select **Change Restriction**.

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

The following diagram shows the Change Restriction dialog box.

To delete all positions from an Assignment Roster

This task allows you to delete all positions from the Assignment Roster, except the root position. You cannot delete the root position.

1 On the **Assignment Roster** dialog box, click the **Action** button, and then click to select **Delete All**.

2 On the **Request Action Message** dialog box, click **OK**.

To build an Assignment Roster from a configuration

This task only applies to positions that are configurations, not to any root *position.*

1 On the **Assignment Roster** dialog box, click to select the **Position** that you want to build from configuration.

2 Click the **Action** button, and then click to select **Build from Configuration**.

Using the View button with Assignment Rosters

The View button on the Assignment Roster dialog box allows you to review details about an Assignment Roster position and a a resource assigned to a position, including:

- viewing resource details
- viewing home unit details
- viewing incident details
- viewing the configuration template of the position
- viewing the resource roster.

The View button appears in three locations on the Assignment Roster dialog box: Below the Assignment Roster table, on the Inventory tab, and on the Roster Position Resources tab.

To view resource details

1. On the **Assignment Roster** dialog box, click to select the filled position or resource of your choice.
2. Click the **View** button, and then click to select **View Resource**.
3. When finished, click **Close**.

To view home unit details

1. On the **Assignment Roster** dialog box, click to select the filled position or resource of your choice.
2. Click the **View** button, and then click to select **View Home Unit**.
3. When finished, click **Close**.

To view incident details

View Incident only applies to resources currently assigned to an Incident.

1. On the **Assignment Roster** dialog box, click to select the filled position or resource of your choice.
2. Click the **View** button, and then click to select **View Incident**.
3. When finished, click **Close**.

To view the configuration template of the position

1. On the **Assignment Roster** dialog box, click to select the position of your choice.
2. Click the **View** button, and then click to select **View Configuration Template**.

3 When finished, click **Close**.

To view the resource roster

View Incident only applies to resources that have a roster.

1 On the **Assignment Roster** dialog box, click to select the filled position or resource of your choice.

2 Click the **View** button, and then click to select **View Roster**.

3 When finished, click **Close**.

Printing an Assignment Roster

The Print button on the Assignment Roster dialog box allows you to print a hardcopy of the Assignment Roster using Brio.Quickview.

For more information about installing and using Brio.Quickview, see "Reports - generating and printing reports," in this ROSS User's Guide.

To print an Assignment Roster

1 On the **Assignment Roster** dialog box, click the **Print** button.

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

Adding/Swapping Assignment Roster resources

The Add/Swap button allows you to add and/or swap assignment roster positions and resources. There are three options for adding/swapping resources:

- **Add/Swap with Resource only**. Allows you to assign the selected resource to the position.
- **Add/Swap with Resource using Roster**. Allows you to assign the selected resource to the position and add the positions on the resources roster to the Assignment Roster, along with the resources assigned to those positions **-** *only available for resources that have a roster.*
- **Add/Swap with Resource using Configuration**. Allows you to assign the selected resource to the position and add the configuration catalog items as positions to the Assignment Roster - *only available for resources qualified as catalog items that have configurations.*

To add/swap an inventory resource

1 On the **Assignment Roster** dialog box, click to select the position for which you want to add or swap a resource.

2 On the **Inventory** tab, complete the filter criteria as appropriate to narrow your search for the resource you want, and then click the **Filter** button.

3 Click to select the **Resource** of your choice, click the **Add/Swap** button, and then click to select the **Add/Swap** option of your choice.

4 When finished, click **OK**.

To add/swap a roster position resource

1 On the **Assignment Roster** dialog box, click to select the position for which you want to add or swap a resource, and then click the **Roster Position Resource** tab.

2 On the **Roster Position Resource** tab, complete the filter criteria as appropriate to narrow your search for the resource you want, and then click the **Filter** button.

3 Click to select the **Resource** of your choice, click the **Add/Swap** button, and then click to select the **Add/Swap** option of your choice.

4 When finished, click **OK**.

Working with the Services tab

The Services tab displays catalog items in the "Services" categories, including:

- Temporary Flight Restriction (TFR)
- Infrared Flight (IR)
- Food Service Request
- other services such as equipment rental and sanitation.

Many elements on the Services tab on the Pending Request screen function in the same manner as those on the Aircraft, Crews, Equipment, Overhead tab. For Services, however, you must complete the Catalog Category and Requested Item filter boxes. In addition, the Select Pending Request(s) table for Services display two additional columns:

- Quantity (requested)
- Note, which includes
  - **Local Purchase.** Your organizaiton is purchasing the requested service from a local, non-ROSS organization
  - **Procurement.** Procurement personnel in your organization working on the request
  - **TFR Sent to ARTCC.** Available for TFR requests only
  - **Infrared Flight Request Sent.** Available for IR requests only, and indicates that the IR Form has been sent to an IR Group outside of ROSS.

You cannot place Services requests externally.

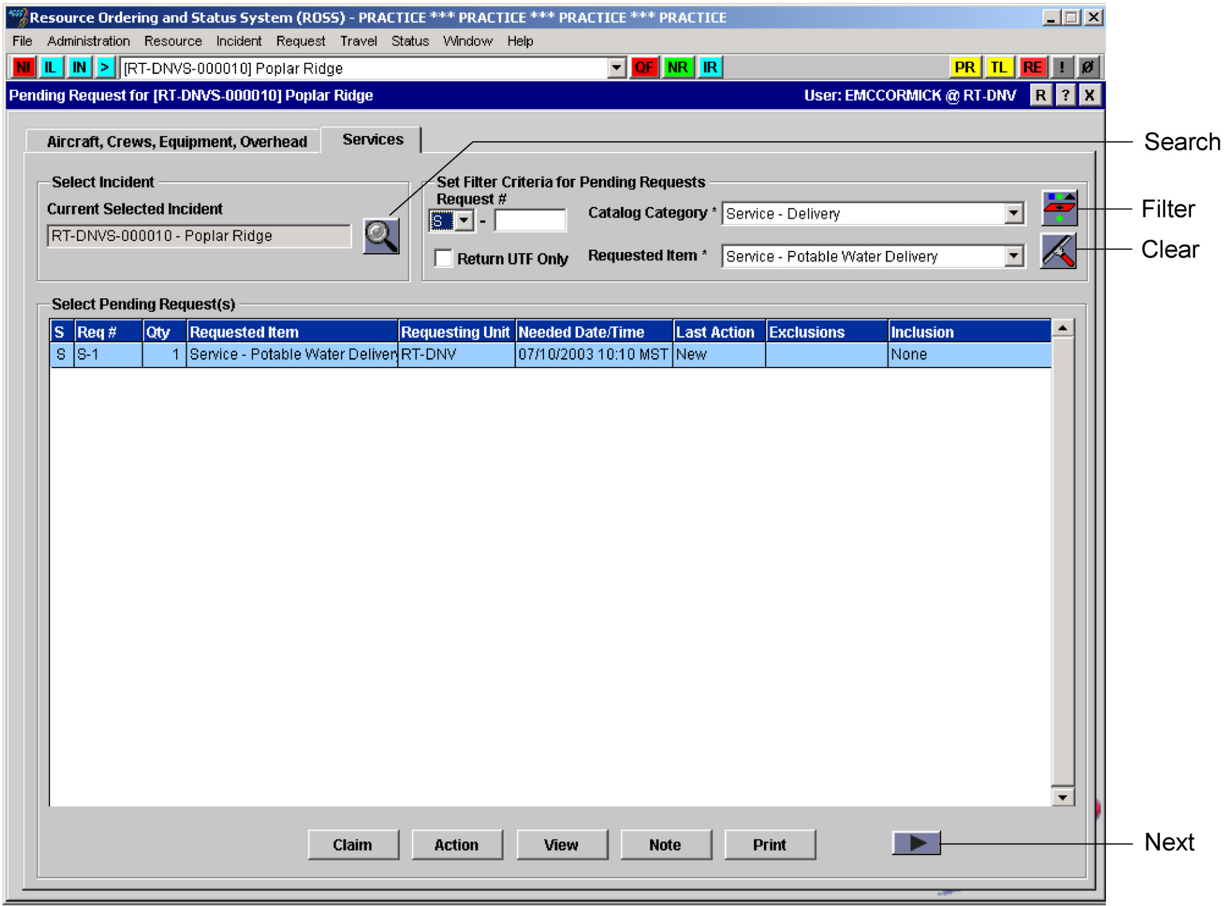
To access the Services tab on the Pending Request screen

PR

1 On the **Request** menu, click **Pending Request**, or click the **PR** button.

2 On the **Pending Request** screen, click the **Services** tab.

Pending Request screen - Services tab



Filling Service requests for local and non-local Incidents

There are three basic types of Service requests:

- Temporary Flight Restriction (TFR) requests. A TFR request is not filled with a resource.
- Infrared Flight (IR) requests. An IR request is filled with a resource item, but that resource is not committed to the Incident associated with the Infrared Flight.
- Other Service requests.

To fill a TFR request

Remember, a TFR request is not filled with a resource.

1 On the **Request** menu, click **Pending Request**, or click the **PR** button.

2 On the **Pending Request** screen, click the **Services** tab, and then search for and select the **TFR Request** of your choice.

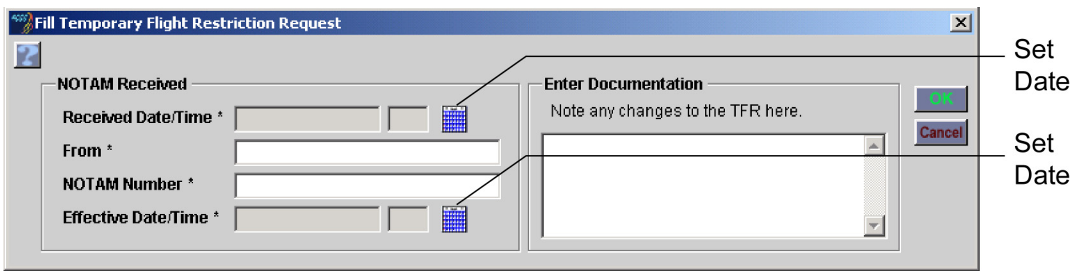
3 Click the **Action** button, and then click to select **Fill**.

4 On the **Fill Temporary Flight Restriction Request** dialog box, complete the following information as appropriate and then click **OK**

- click **Set Date**, and then complete the **Received Date/Time** box
- in the **From** box, type the name of the contact person for the TFR request
- in the **NOTAM Number** box, type the NOTAM number
- click **Set Date**, and then complete the **Effective Date/Time** box
- under **Enter Documentation**, type any documentation for the TFR.

5 When finished, click **OK**.

The following diagram shows the Fill Temporary Flight Restriction Request dialog box.



To fill an Infrared Flight request

1 On the **Request** menu, click **Pending Request**, or click the **PR** button.

2 On the **Pending Request** screen, click the **Services** tab, and then search for and select the **Infrared Flight Request** of your choice.

3 Click the **Action** button, and then click to select **Fill**.

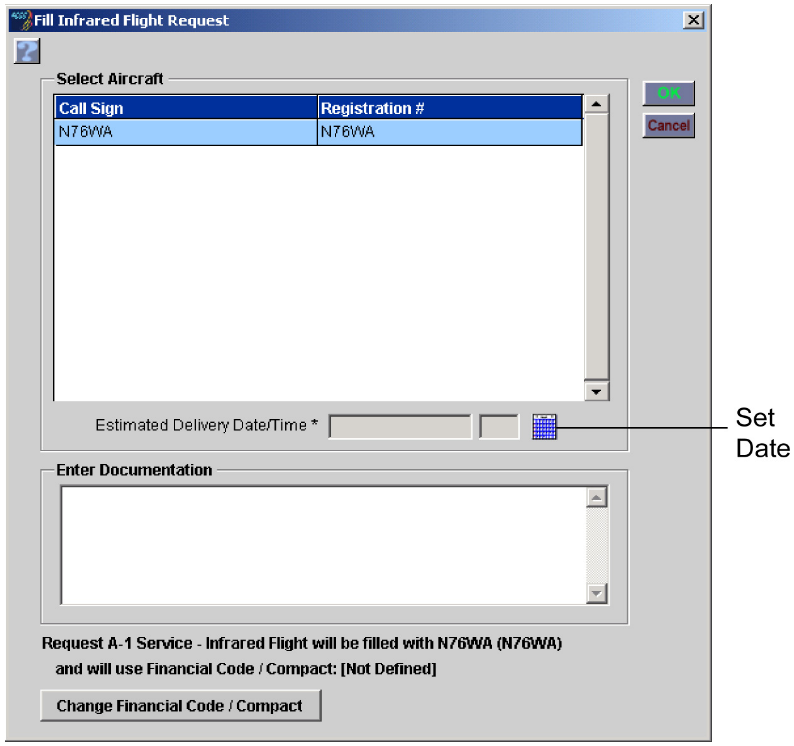
4 On the **Fill Infrared Flight Request** dialog box, click to select the **Aircraft** of your choice.

5 Click **Select Date**, and then complete the **Estimated Delivery Date/Time** box.

6 In the **Enter Documentation** box, type any appropriate documentation, and then click **OK**.

For more information about changing the Financial Code, see "To change a financial code," in "Filling Pending Requests," earlier in this chapter.

The following diagram shows the Fill Infrared Flight Request dialog box.



Filling other Service requests

The Fill or Place Pending Request dialog box may display up to five tabs for filling service Pending Requests:

- CWN Contract
- Purchase Agreements
- Enter Fill Description
- Committed
- Other Sources.

To fill a service request using a CWN contract

1. On the **Request** menu, click **Pending Request**, or click the **PR** button.
2. On the **Pending Request** screen, click the **Services** tab, and then search for and select the request of your choice.
3. Click the **Action** button, and then click to select **Fill**.
4. On the **Fill or Place Pending Request** dialog box, click the **CWN Contract** tab.
5. Click to select the **Resource** of your choice, and then complete the appropriate information under **Resource Assignment**.

To view information about the resource, click the ***Resource View*** *button.*

6. When finished, click **OK**.

To fill a service request using a Purchase Agreement

1 On the **Request** menu, click **Pending Request**, or click the **PR** button.

2 On the **Pending Request** screen, click the **Services** tab, and then search for and select the request of your choice.

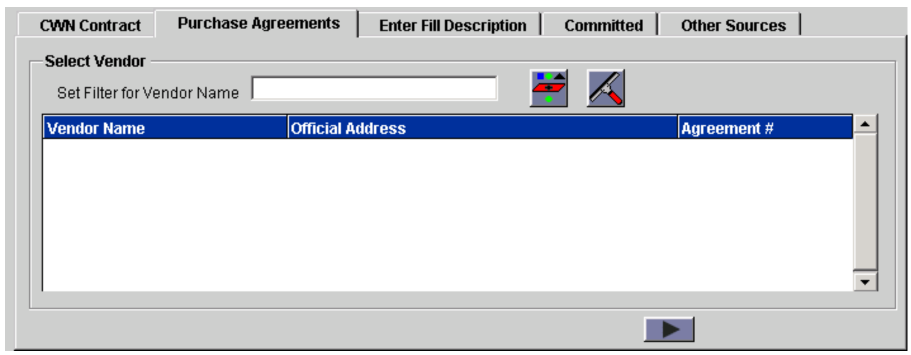
3 Click the **Action** button, and then click to select **Fill**.

4 On the **Fill or Place Pending Request** dialog box, click the **Purchase Agreement** tab.

5 Search for and click to select the **Purchase Agreement** of your choice, and then complete the appropriate information under **Resource Assignment**.

6 When finished, click **OK**.

The following diagram shows the Purchase Agreement tab.



To fill a service request by entering a fill description

1 On the **Request** menu, click **Pending Request**, or click the **PR** button.

2 On the **Pending Request** screen, click the **Services** tab, and then search for and select the request of your choice.

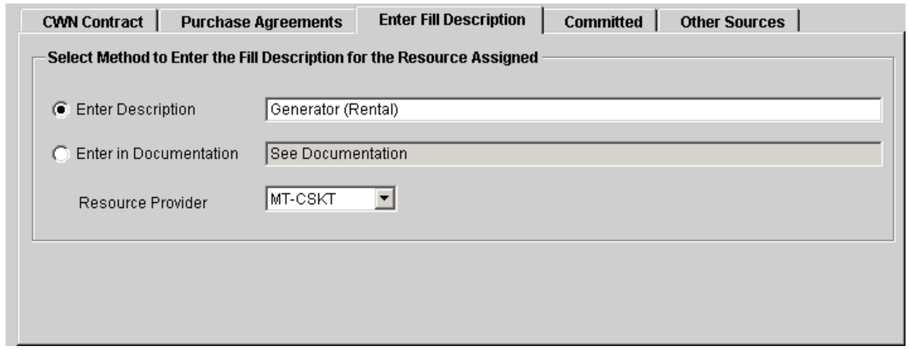
3 Click the **Action** button, and then click to select **Fill**.

4 On the **Fill or Place Pending Request** dialog box, click the **Enter Fill Description** tab.

5 Click either **Enter Description** or **Enter in Documentation**, type the fill description, and then complete the appropriate information under **Resource Assignment**.

6 When finished, click **OK**.

The following diagram shows the Enter in Documentation tab.



To fill a service request using a committed resource

1 On the **Request** menu, click **Pending Request**, or click the **PR** button.

2 On the **Pending Request** screen, click the **Services** tab, and then search for and select the request of your choice.

You cannot reassign "Service - Communications" and "Service - Meals-Food-Lodging." The Committed tab is not available for these services.

3 Click the **Action** button, and then click to select **Fill**.

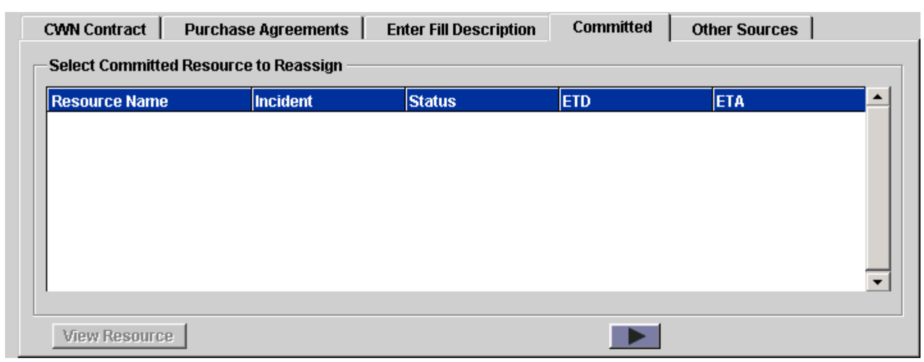
4 On the **Fill or Place Pending Request** dialog box, click the **Committed** tab.

5 Click to select the **Resource** of your choice, and then complete the appropriate information under **Resource Assignment**.

*To view information about the resource, click the **Resource View** button.*

6 When finished, click **OK**.

The following diagram shows the Committed tab.



To place a service request using the Other Sources tab

1 On the **Request** menu, click **Pending Request**, or click the **PR** button.

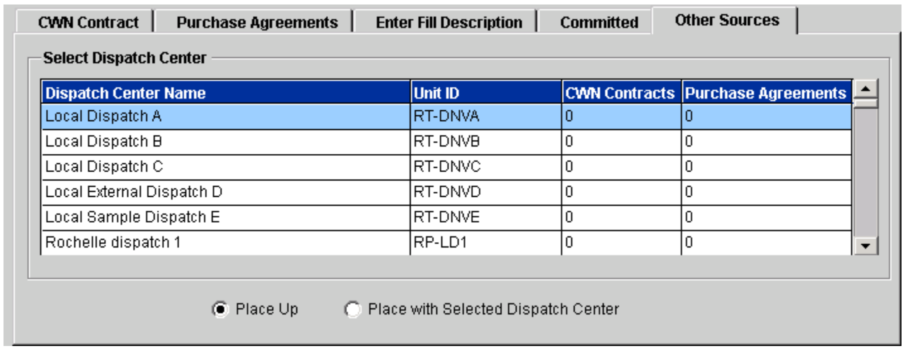
2 On the **Pending Request** screen, click the **Services** tab, and then search for and select the request of your choice.

3 Click the **Action** button, and then click to select **Fill**.

4 On the **Fill or Place Pending Request** dialog box, click the **Other Sources** tab.

5 Click to select the **Dispatch Center** of your choice, click to select **Place with Selected Dispatch Center**, and then click **OK**.

The following diagram shows the Other Sources tab.



To place up a service request using the Other Sources tab

You can also Place Up requests for Other Sources using the ***Action*** *button that is located under the* ***Select Pending Request(s)*** *section of the Pending Request screen.*

1 On the **Request** menu, click **Pending Request**, or click the **PR** button.

2 On the **Pending Request** screen, click the **Services** tab, and then search for and select the request of your choice.

3 Click the **Action** button, and then click to select **Fill**.

4 On the **Fill or Place Pending Request** dialog box, click the **Other Sources** tab.

5 Click **Place Up**, and then click **OK**.