SECTION 4

ROSTER

SECTION 4 – Roster

Significant Changes to this Unit of the Training Reference Manual since last update:

1. Added text regarding the 'Apply' button. (p. 4.10).

2. Added text regarding use of status-only dispatch resources on a Roster (p. 4.12).

SECTION – Roster

Table of Contents

Summary.

- Accessed by the 'Resource' menu.

- Used to create and edit master rosters for resources classified as a catalog item with a configuration.

- For resources with dedicated personnel (e.g., Type 1 Crews, overhead teams, and exclusive-use helicopters), creating a master roster ahead of time expedites assigning the resource to an Incident request.

- If different resources are assigned to a resource each time it is used on an Incident then there is no advantage to preparing a master roster.

- A roster is a list of catalog items attached to a resource.

- Rosters can be created for Aircraft, Crew, Equipment, or Overhead resource items (but not Supply items or items that are Services).

- Each roster position must be filled with a resource item having the appropriate qualification/classification.

- A resource can only have one roster, however a resource can be assigned to any number of rosters.

- The following is an example of a roster for a specific Crew, Type 1 resource:

Catalog:	Crew
Category:	Fire
Catalog Item:	Crew, Type 1
Resource Name:	Smokey Bear Hot Shots
Roster Name:	Smokey Bear Hot Shots Roster
Roster:	Crew Boss and 16 Firefighters

I. 'SEARCH CRITERIA FOR RESOURCES' POP-UP DIALOG BOX

The 'Search Criteria for Resources' pop-up dialog box displays automatically each time the 'Roster' screen is initially opened. If the Roster screen is already open, you must click the 'Search' button on the Roster screen to access the 'Search Criteria for Resources' dialog box.

A. 'Search Criteria for Resources' section of the dialog box.

1. Enter/select filter criteria as appropriate:

   a. Catalog (required field) – Select a catalog from the drop-down list.

   b. Catalog Item – Click the 'Pick' button, which brings up the 'Select Catalog Item' pop-up dialog box.

      (1) Enter/select filter criteria as appropriate:

         - Catalog (defaults to the Catalog selected in the 'Search Resources' dialog box and cannot be changed).
         - Category.
         - Item Name.
         - Item Code.
         - Keyword.

      (2) Click the 'Filter' button.

      (3) Results are displayed in the table.

      (4) Select a resource and click 'OK'.

   c. Resource Name – Enter the name of a specific resource. Wildcard search is permitted.

   d. Choose one of the four 'Resources That Have' radio buttons:

      (1) Roster or No Roster.

      (2) Roster with Local Resources Only.

(3) Roster with Local or Non-local Resources.

(4) No Roster.

2. Click the 'Filter' button. Results are displayed in the 'Search Results' table.

B. 'Search Results' section of the dialog box – The table displays the following for each resource:

1. Resource Name.

2. Roster Name – Name of the resource's roster, if applicable.

3. Home Unit.

4. Status – The resource's status (e.g., 'Available', 'Reserved').

C. Select a resource.

D. 'View' button – Brings up the 'View Resource' pop-up dialog box for the selected resource. The 'View Resource' screen is only for 'viewing' details about a resource – the displayed information cannot be edited.

E. Click 'OK'. The 'Search Criteria for Resources' dialog box closes and you are taken to the 'Roster' screen.

II. 'ROSTER' SECTION OF THE 'ROSTER' SCREEN

A. Resource Name – The name of the selected resource.

B. Roster Name – The name of the selected resource's roster, if applicable.

C. Has Non-local Resources – Indicates by Yes/No whether the selected roster has a non-local resource assigned to a position on the first level of hierarchy under the root resource. Even if rosters of resources at the second or greater level of hierarchy have non-local resources assigned, the 'Has Non-local Resources' will still display 'No'.

D. 'Search Resources' button – Brings up the 'Search Resources' pop-up dialog box. Used to select a different resource. If you select a resource that does not yet have a roster, the 'Roster Name' field will be blank. Note that if you select a resource that does not have a roster, the roster of the previous resource may still appear in the 'Primary Roster Position' table.

E. 'View Resource' button.

F. 'Documentation' button – Brings up the 'Add Documentation' pop-up dialog box.

1. To add a new entry:

    a. Type the text in the lower left text-entry field.

    b. Click the '+' to save the entry.

2. Once an entry is made, it cannot be edited or deleted.

3. Add additional documentation entries as appropriate.

4. Entries appear in the 'Request Documentation' table. The following is displayed for each entry:

    a. Documentation.

    b. Time entered – Date and time of the entry.

    c. Zone – Time zone.

    d. Entered by – Person who made the entry.

G. 'New' button – Used to create a new roster. Not applicable if the resource already has a roster. Brings up the 'New Roster' pop-up dialog box.

1. Resource Name – Displays the name of the resource for which the roster is being developed.

2. Roster Name – Defaults to the resource name, with organization code added as a suffix. The roster name can be change by clicking in the field and entering text.

3. The table displays all configuration catalog items the resource is qualified as. If you want to use a qualification as the template for the roster:

   a. Select the qualification from the table (Rosters should always be built for the resource's primary qualification, and never for catalog items containing the terms 'or' or 'any').

   b. Check the 'Use Selected Qualification with Configuration as Template' check box.

4. If you do not check the 'Use Selected Qualification with Configuration as Template' check box, you will be building the roster from scratch (i.e., you will have to add the catalog items that make up the configuration).

5. Note that you are developing the roster for the <u>resource</u>, independent of the qualification selected as a template.

6. 'View Configuration' button – Brings up the 'View Configuration' pop-up dialog box, which displays the catalog items, and their quantities, of the selected configuration. Click '+' to view the contents of a folder. Click '-' to close a folder.

7. 'Enter Purpose/Documentation for Roster' – Text can be entered directly in the box.

8. Click OK.

9. If you are using a configuration template, you receive the following message: “Some qualifications in the configuration may have their own configurations. Their configurations will not be added to the roster. Individual rosters must be built for each configuration.”

   This is in reference to nested rosters (e.g., Strike Teams).

10. The 'New Roster' dialog box closes and you are returned to the 'Roster' screen.

H. 'Edit' button – Used to edit the name of the selected roster. Brings up the 'Edit Roster' pop-up dialog box.

   1. Resource Name – The resource’s name, which cannot be edited in this dialog box.

   2. Roster Name – The name of the resource’s roster, which can be edited by clicking in the field and entering text.

I. 'Delete' button – Deletes the selected roster.

III. 'PRIMARY ROSTER POSITION' SECTION OF THE 'ROSTER' SCREEN

A. The table displays the following for each roster position:

   1. Position – The catalog item name.

   2. Restriction – Applicable to Overhead catalog items only. Displays 'Qualified Only', 'Trainee Acceptable', or 'Developmental'.

   3. Resource Name – The resource assigned to the position, if applicable.

      Note that if the resource has a roster, it can be displayed by clicking the '+' to the left of the icon.

   4. Home Unit – Home Unit of the resource.

   5. Status – The resource’s status (e.g., 'Available', 'Reserved').

   6. Local – Indicates by Yes/No whether the resource is local.

7. Reserved – Indicates by Yes/No whether the resource is reserved for this roster. If a resource is reserved for a roster, and someone attempts to use the resource independent of the roster, they will receive a warning message. The warning does not, however, prevent use of the resource.

B. 'Action' button (multi-select permitted unless noted)

1. Add Position (multi-select <u>not</u> permitted) – Applicable only to positions that have configurations. Used to add a position to the selected Roster position. Brings up the 'Add Roster Position' pop-up dialog box.

a. Statement at the top of the dialog box: "Selected position to be added under position [position name]."

b. Select/Enter filter criteria:

(1) Catalog.

(2) Category.

(3) Item Name.

(4) Item Code.

(5) Keyword.

c. Click the 'Filter' button. Filter results are displayed in the table. Select a catalog item.

d. # Positions – Type in the number of positions to be added to the roster. The default is one.

e. Restriction Type – Displays only for Overhead catalog items. Select 'Qualified Only', 'Trainee Acceptable', or 'Developmental' from the drop-down list. Note that if an overhead position is marked 'Trainee Acceptable', and the roster is subsequently used to fill a configuration request, the subordinate request for the overhead position will retain the 'Trainee Acceptable' designation.

f. Click the 'Apply' button to add the position to the roster.

g. After all positions have been added, click OK. The 'Add Roster Position' dialog box closes and you are returned to the 'Roster' screen.

2. Delete Position – Removes the selected position(s) from the roster.

3. Remove Resource – Only applicable if a resource has been assigned to the selected roster position. Unassigns the resource. The resource automatically becomes an alternate for the position.

4. Mark as Reserved – Only applicable if a resource has been assigned to the selected roster position. Marks the resource as 'reserved' for the roster. If someone attempts to use a reserved resource independent of the roster, they will receive a warning message. The warning does not, however, prevent use of the resource.

5. Clear Reserved – Only applicable if a resource has been assigned as 'reserved' to the selected roster position. Removes the 'reserved' designation.

6. Change Restriction – Applicable to Overhead only. Brings up the 'Change Restriction' pop-up dialog box. Select a new restriction from the drop-down menu. If the position has a resource assigned, the restriction cannot be changed to a level that the resource cannot meet. For example, if a position is filled with a resource that is a Trainee, the restriction cannot be changed to Qualified without first removing the resource.

C. 'View' button – Drop-down list contains the following options:

1. View Resource.

2. View Home Unit.

3. View Configuration.

4. View Incident.

D. 'Print' button – Prints the selected roster.

IV. 'ADD/SWAP ROSTER RESOURCES' SECTION OF THE 'ROSTER' SCREEN

Used to assign resources to roster positions. There are two tabs: 'Inventory' and 'Alternates'. Note that resources from a status-only dispatch cannot be assigned to a roster position.

A. 'Inventory' tab – Displays resources qualified to fill the position selected in the 'Primary Roster Position' table (regardless of whether the resource is already a primary or alternate on the roster).

1. Enter/select filter criteria:

    a. Resource Name.

    b. Home Unit ID.

    c. Select a radio button:

        (1) Local inventory.

        (2) Non-local Inventory – If selected, you must enter a Unit ID.

2. Click the 'Filter' button.

3. Filter results are displayed in the table. The following is displayed for each resource:

    a. Resource – Name of the resource.

    b. Roster Name – Name of the resource's roster, if applicable.

    c. Home Unit – Home Unit of the resource.

    d. Status – The resource's status (e.g., 'Available', 'Reserved').

    e. Q/T/U – Applicable to Overhead only. Indicates whether the resource is 'Qualified', 'Trainee', or 'Unknown'.

    f. Reserved – Indicates by Yes/No whether the resource is reserved on a roster.

4. 'Add as Alternate' button – Adds the selected resource as an alternate to the position selected in the 'Primary Roster Position' table. The resource is also automatically added as an alternate

for all other positions of that catalog item on the roster. For example, if a resource is added as an alternate to a roster position for a 'Firefighter', the resource is automatically added as an alternate for all 'Firefighter' positions on the roster.

5. 'Add/Swap' button.

    a. If a resource is not yet assigned to the selected roster position, assigns the selected resource to the position. The resource is also automatically added as an alternate for all other positions of that catalog item on the roster.

    b. If a resource is already assigned to the selected roster position, swaps out the assigned resource with the selected resource. The selected resource, and the swapped out resource, are automatically added as alternates for all other positions of that catalog item on the roster.

6. 'View' button – Drop-down list contains the following options:

    a. View Resource.

    b. View Home Unit.

    c. View Roster.

    d. View Incident.

B. 'Alternates' tab – Displays the alternates for the position selected in the 'Primary Roster Position' table.

1. The following is displayed for each resource:

    a. Resource – Name of the resource.

    b. Roster Name – Name of the resource's roster, if applicable.

    c. Home Unit – Home Unit of the resource.

    d. Status – The resource's status (e.g., 'Available', 'Reserved').

    e. Local – Indicates by Yes/No whether the resource is local.

2. 'Add/Swap' button – Same as on 'Inventory' tab.

3. 'Remove' button – Removes the selected resource as an alternate for the selected position, as well as for all other positions of that catalog item on the roster.

4. 'View' button – Drop-down list contains the following options:

    a. View Resource.

    b. View Home Unit.

    c. View Roster.

    d. View Incident.