

# ROSS DISPATCH

## BASIC 9 – RELEASING AND REASSIGNING RESOURCES

---

---

### OBJECTIVES

Upon completion of this unit, the trainee will be able to:

1. Release a resource from an Incident.
2. Edit a resource's release.
3. Reassign a resource to another Incident request.
4. Quick Fill a resource to another Incident.
5. Release a resource from a non-local Incident.
6. Manage release authorization

## I. 'INCIDENT RESOURCES' SCREEN

### Summary.

- Accessed by 'Incident' menu or 'IR' toolbar button.
- Used to release or reassign resources.
- 'Most Recent Incidents' toolbar drop-down list applies (but not to Non-Local Support Requests radio button).

#### A. 'Set Incident Filter' section – Select a radio button:

- Local.
- Non-local Support Requests – Provides access to non-local support requests you created and retained control of. Select incident then click '>'.

#### B. 'Set Catalog Filter' section.

#### C. 'Set Resource Filter' section.

Two remaining filters are: 'Set Filter Criteria for Incident Resources' and 'Set Filter Criteria for Individual Resources'. Only one can be used.

- 'Set Filter Criteria for Incident Resources'.
  - Days or Less at Incident – Enter number. 'On the Incident' covers from 'At Incident' through 'Demob En Route'.
  
  - To filter by type of mobilization travel:
    - Check the check box.
    - Select radio button.
    - Search limited to resources that used selected mode of travel at least once during trip to incident.
  
  - If use Release Date/Time filter, also excludes resources for which a release date has not yet been set.
  
- 'Set Filter Criteria for Individual Resources'.

Request # suffix – Multiple numbers and ranges of numbers can be entered, separated by commas (e.g., 1,3,5-7,9).

D. 'Incident Resources' Table.

E. 'Action' Button.

1. Release – Only available for Mob En Route or At Incident resources.

a. Can release:

- Resources on requests for which release authorization is not required.
  
- Resources on requests for which release authorization is required and:
  - Resource is Tentative Released, and
  - Release authorization received.

b. Release Authorization.

- Can be set at catalog, category, or catalog item level for the incident.
  
- Cannot be set for catalog item that is:
  - An alias (i.e., not unique).
  - A service.
  - Untracked.

- Resource on non-local support request can only require release authorization if requesting dispatch has yielded control to incident dispatch.

c. 'Release Resource(s)' dialog box.

- Release radio button
  - If 'Release' is selected, resource automatically released when displayed release date/time arrives.
  - Enabled if authorization is not required, or if required and has been obtained.
  - Disabled if authorization is required but not yet obtained.
- If 'Tentative Release' radio button is selected, resource is not automatically released when displayed release date/time arrives.
  - In order to tentatively release a resource, resource cannot be a configuration parent with subordinate resources having a status of Reserved, and must have one of following statuses:
    - Mob En Route (only if resource requires release authorization).
    - At Incident.
    - Released (At Incident).
    - Demob En Route.

- Disabled if:
  - Selected resource is Mob En Route and does not require release authorization.
  - Release Resource dialog box is accessed from Disposition of Support Requests dialog box.
  
- 'Travel' options are not applicable for tentative release.
  
- Release Options – Applies to prepositioned resources.
  
- 'Release To Location' – If you multi-select resources to be released, cannot set a 'Release To' location.
  - Organizations.
  
  - Airports.
  
  - Locations.
  
- 'Available For Reassignment' – Enabled only if 'Tentative Release' selected.

- Select Available radio button: Resource's status set to 'Tentative Released (A)', with 'A' indicating resource available for reassignment.
  
- Select Unavailable radio button: Resource's status set to 'Tentative Released (U)', with 'U' indicating resource unavailable for reassignment.
  
- 'Enter Documentation'.
  
- 'Release To Base'.

  - Used to select a reload base when releasing a Record Manager Only tactical aircraft resource.
  
  - 'Pick' button brings up 'Pick Release To Base' dialog box, with only 'Airports' tab displayed. This tab was previously discussed.

- Can cancel resource's release from either:
  - Edit Release on Incident Resources.
  
  - Cancel Release on Request Status.

## 2. Edit Release.

### a. To edit a resource's release:

- Resource's status must be:
  - Tentatively released.
  - Released (At Incident).
  - Demob En Route, or
  - Mob En Route (only if request status is Tentative Released).
  
- Your dispatch must be:
  - Incident dispatch.
  - Home dispatch.
  - Dispatch that dispatches for resource's current operating base.
  - Requesting dispatch (if non-local support request with control retained).
  
- Incident is open.

### b. Brings up 'Edit Release' dialog box.

c. Select a radio button:

- Release.
  
- Tentative Release – Disabled if:
  - At least one resource being released is Mob En Route, is not already tentatively released, and does not require release authorization.
  - Release is being performed by a dispatch other than incident dispatch.
  
- Cancel Release – Cancels the release.
  - If Tentative Released or Released (At Incident), only current dispatch can cancel (if non-local support request true regardless of control).
  
  - If Demob En Route, only incident dispatch can cancel (unless non-local support request, where only controlling dispatch can cancel).
  
  - To cancel subordinate release, parent must be:
    - At Incident.
    - Available/Unavailable on a preposition incident.
    - Tentative Released, or
    - Released (At Incident).

- If a parent, and at least one released sub has different release date/time from parent, have option of also applying cancellation to all previously released resources.
- After a resource's release is cancelled, its status is set to At Incident (or Available on preposition if applicable).
- d. 'Release Date/Time' Pick button – Disabled if Tentative Release radio button selected and resource is Mob En Route.
- e. 'Travel', 'Release To Location', 'Enter Documentation' – Previously discussed.
- f. 'Un-releasing' subordinate resources:
  - If resource on a subordinate request is released independent of resource on parent request:
    - Resource on subordinate request can independently be un-released if resource on the parent request is still at the incident.
    - Resource on subordinate request cannot independently be un-released if resource on parent request is demobilizing.
  - If resource on a subordinate request is released because resource on parent request is released, resource on the subordinate request cannot independently be un-released.

### 3. Reassign.

- a. Option does not display if multiple Supply requests are selected.
- b. When resource reassigned to alias request, is reassigned using qual of unique catalog item associated with alias for which resource is qualified (not catalog item of request resource had been on).
- c. Reassigning resources that are part of a configuration:
  - Reassigning resource on parent request automatically reassigns subordinates.
  - Order of positions, and their associated subordinate request number suffixes, is retained.
  - Resource on a subordinate request can be reassigned without affecting parent or other subs.
  - If reassigning parent, 'Reassign Roster' screen displays.
  - When parent reassigned, any filled subs on original assignment inherit travel selected for parent to new assignment.

- d. When reassigning single resource, dialog box contains two tabs.
- e. **'Pending Requests' (1st Tab** in 'Reassign Resource' dialog box).
- Used to reassign resource to another incident request.
  - Search for requests pending with your dispatch that resource could fill.
  - 'Local Incidents' and 'Non-local Incidents' radio buttons.
  - 'External Request' check box – Displays only requests for External incidents.
  - 'Set Search Criteria for Requests' section of tab.
    - For all Catalogs except Overhead, 'Search by Qualification' radio button is only option.
    - For Overhead resource, select a radio button:
      - Search by Qualification – Displays resource's current qualifications. For Overhead:

- Also displays status of each qualification: Qualified (Q) or Trainee (T).
  - Qualifications that are Unknown (U), Blocked (B), or Unqualified (N) do not display.
  - Disabled if the resource has no current qualifications with status of Q or T.
  
- Search by Catalog Item (Overhead only) – Search for a role resource can perform, but is not qualified for. Brings up 'Choose Catalog Item for Reassignment' dialog box.
  
- 'Select Request for Reassignment' section of tab.
  - If an Overhead resource and Search by Qualification filter was used:
    - If Trainee status, displays requests for Trainee Required or Trainee Acceptable.
    - If Qualified status, display requests for No Trainee.
  
  - Select request and click 'OK'. Brings up 'Reassign Request' dialog box.
  
  - Dialog box identical to 'Reassign Resource' dialog box that displays when reassigning from 'Pending Request' screen.
  
  - When reassigning an Overhead from Pending Requests tab, following are considered overrides:

- Resource's qualification does not match requested item (and documentation must be entered in Enter Documentation field), or
      - Resource's qualification matches requested item, but resource's qualification status is Blocked or Unqualified (however documentation is not required).
    - Select/enter information in 'Reassign Resource dialog box, and click 'OK'.
  - When reassigning a resource whose original assignment was filled by an external supply cache, ROSS:
    - Prevents reassignment if reassign-to request and reassign-to incident do not have a financial code.
    - If a prepositioned NFES resource, sets Release Option to Release to Home.
  - 'View' Button.
- f. **'Quick Fill Reassignment' (2nd Tab** in 'Reassign Resource' dialog box).
- Used to reassign one or more resources.
  - Does not display if selected resource is from Supply catalog.

- 'Set Resource Criteria for Reassignment' section of tab.
  - For all Catalogs except Overhead, 'Assign by Qualification' radio button is only option.
  - For an Overhead resource, select a radio button:
    - Assign by Qualification.
      - Qualifications that are Unknown (U), Blocked (B), or Unqualified (N) do not display.
      - Disabled if the resource has no current qualifications with status of Q or T.
    - Assign by Catalog Item.
- 'Select Incident for Reassignment' section of tab.
- If reassignment is an override, enter text in Documentation field.
- When reassigning an Overhead from Quick Fill Reassignment tab, following are considered overrides:
  - Resource does not have selected qualification, or
  - Resource has selected qualification, but resource's qualification status is Blocked or Unqualified.

- Request created on selected incident, using system default block, and filled with resource being reassigned.
- After Overhead quick fill reassignment using Assign by Qualification functionality, reassign-to request trainee restrictions are set as follows:
  - If qualification status is Qualified, trainee restriction is set to No Trainee.
  - If qualification status is Trainee, trainee restriction is set to Trainee Required.

g. Select Reassign Option.

- When reassigning resource from request for which intent to add assignment roster later was indicated, Select Reassign Option dialog box displays.
- Select a radio button:
  - Reassign without Assignment Roster.
  - Add Assignment Roster Now.

F. 'Go To' button.

G. 'View' Button.

H. 'Print' Button – Prints request associated with selected resource.

## II. 'RESOURCES (NONLOCAL INCIDENT)' SCREEN

### Summary

- Accessible from Resources menu.
  
- Allows either Home Dispatch or Preposition Dispatch to release, or edit release of, their resources from non-local incident.
  
- Also used:
  - To add a subordinate request to a non-local parent request.
  
  - By a Home Dispatch to add documentation to a request for which they are not in the Ordering chain.
  
- Must have Dispatch Manager role to access.

A. 'Filter Criteria For Filled Requests' section of screen.

- Resource Name filter.
  
- Overhead Resource Name filters – Applicable for Overhead resources only.
  
- Additional filters – Applicable with either Resource Name or Overhead Resource Name filters.
  - Request #.
  - Provider.
  - Incident Name.
  - Incident #.

B. Filled Requests' section of screen.

1. 'Filled Request' table – In order for a request to display, all of the following must be true:
  - The resource is one of the following:
    - Mob En Route.
    - At Incident.
    - Available or Unavailable on a preposition incident.
    - Tentative Released.
    - Released (At Incident).

- Your dispatch is one of the following:
  - Home dispatch but not the incident dispatch.
  - Preposition dispatch (only if the resource is assigned to a non-local non-preposition incident with the Release to Preposition option selected).
  - Filling dispatch but not the incident dispatch (only if the resource is assigned to a tracked service request).
  
- The request is not on a source incident undergoing a merge.
  
- The request is tracked.

2. 'Action' button.

a. Release.

- In order to release a resource from a non-local incident, all of following must be true:
  - Your dispatch is home dispatch, but not incident dispatch.
  - If your dispatch is preposition dispatch, resource is assigned to a non-local non-preposition incident with Release To Preposition release option.
  - Resource's status is Mob En Route, At Incident, Available or Unavailable on a preposition incident, or

Tentative Released. Note that a Reassigned (At Incident) resource cannot be released from the Resources (Nonlocal (Incident) screen.

- If resource is on a non-subordinate request, and release authorization is required, it has been granted.
  - If resource is on a subordinate request, and parent requires release authorization, it has been granted to either parent or the subordinate.
- 
- Can release resource from support request whether or not your dispatch retained control.
  
  - Can release resource from a non-local preposition incident even if resource has been assigned to non-preposition.
  
  - Same as when releasing resource from local incident:
    - Releasing parent releases all subs, even those managed by non-local dispatches.
  
    - Parent cannot be released if pending subordinate requests remain – must first be cancelled.
  
  - Brings up 'Release Resource' dialog box (previously discussed).

- b. Edit Release – Applicable to resources that have either been tentatively released or released.
  
- c. Add Subordinate Request – Applicable only to filled configuration requests.
  
- d. Add Documentation.
  - Allows a Home Dispatch to add documentation to a request for which they are not in Ordering chain.
  
  - Necessary when a resource is reassigned from one non-local incident to another non-local incident, in order to provide reassign-to incident dispatch information about resource.

3. 'View' button.

### III RELEASE AUTHORIZATION SCREEN

#### Summary

- Accessible via Resource menu.
  
- Must have Dispatch Manager role, with 'Release Authorization Management' function assigned.

- Used to control release of resources assigned to incidents managed by your subordinate dispatches.
  
- Can be designated at catalog, category, or catalog item level for each individual incident.
  
- If release authorization required, must be obtained from Incident Dispatch's parent dispatch.
  
- Incident Dispatch tentatively releases resource. Parent dispatch can either authorize release or leave 'on hold'.
  
- Release authorization not required for resource assigned to non-local support request for which control was maintained by requesting dispatch.
  
- If release authorization is required for parent resource, it is required for subordinates, whether or not catalog, category, or catalog item of subordinate request is designated as requiring release authorization.
  
- A dispatch can, at time of tentatively releasing a resource, indicate whether resource is available for reassignment.
  - A. 'Set Filter Criteria for Incidents' section of screen.
  
  - B. 'Select Incident' section – 'Select Incident' table.

C. 'Manage Release Authorization For Incident' section.

1. 'Release Restrictions' tab – Used to create or delete release restrictions.
  - Select filter criteria as appropriate.
  - Release Restrictions table – Displays release restrictions in place for selected incident.
  - To add a restriction click New button, which brings up Add Release Restriction dialog box.
  - NFES category catalog items: Release restrictions can only be established for tracked NFES catalog items.
  - You cannot edit an existing restriction – it must be deleted and then created again.
2. 'Incident Resources' tab – Used to take action on tentatively released resources assigned to selected incident.
  - a. 'Set Filter Criteria for Incident Resources' section of the tab.
  - b. 'Incident Resources' Table:

- Displays resources for which following are true:
  - Assigned to a request with a requested item from a catalog and category, or for a catalog item, designated for the incident as requiring release authorization.
  - Resource status is Mob En Route or Tentative Released.
  - Request status is Tentative Released.
  - Assigned to a non-supply, non-service request.
  
- Resources assigned to non-local support requests where control has not been yielded to the incident dispatch are not displayed.
  
- Columns of note:
  - Release Authorization – Displays 'Hold', 'Authorized', or 'N/A' as appropriate.
  
  - Resource Status – Displays status, followed in parenthesis by either 'A', indicating resource is available for reassignment, or 'U', indicating not.
  
- c. 'Action' button.
  - Hold Release – Only displays if release authorization is 'Authorized'.

- Switches status from 'Authorized' to 'Hold'.
  
- Applied to all configuration subordinates.
  
- Authorize Release – Only displays if release authorization is 'Hold'.
  - Switches status from 'Hold' to 'Authorized'.
  
  - Applied to all configuration subordinates.
  
  - If release authorized, then cancelled, authorization must be re-obtained.
  
- View/Add Documentation.

d. 'View' button.