

# Merge Resources - merging duplicate records

This chapter explains how to merge one or more duplicate resources items into one master record, which remains once the merge is complete. Topics in this chapter include:

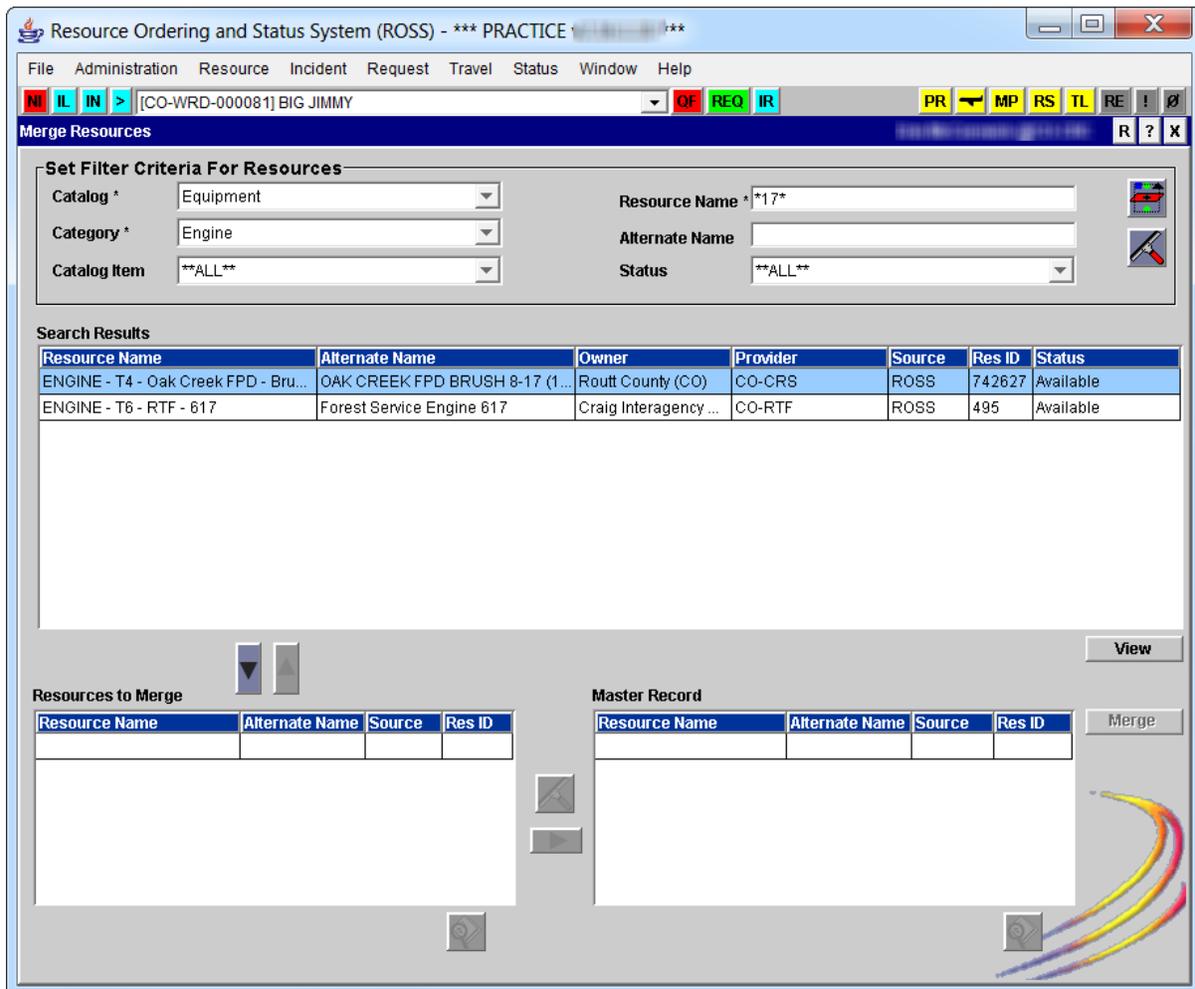
- Merging duplicate resources
- Exploring the merge resources function in detail.

## To access the Merge Duplicate Resources screen

*You must have the Dispatch Manager role to merge duplicate resources.*

- On the **Administration** menu, click **Merge Resources**.

## Merge Resources screen



## Merging duplicate resources

This section explains how to merge two or more local resources into one master record. It also briefly explains how to view additional request information about a resource as available, including the resource request, the requesting unit, the filling unit, and the home dispatch unit.

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*For more information about viewing additional request information about a resource, see the chapter "Request Status - managing the status of request," in this ROSS User's Guide.*

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### To merge two or more resources into a master record

- 1 On the **Merge Resources** screen, click the **Catalog** drop-down arrow, and then click the **Catalog** of your choice.
- 2 Click the **Category** drop-down arrow, and then click the **category** of your choice.
- 3 In the **Resource Name** box, type the name of the resource, and then click the **Filter** button.

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*Remember, you can perform a wildcard search by typing \* (asterisk) in the **Resource Name** box.*

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-  4 Under **Search Results**, click the **Resource Name** of your choice, and then click the **Select Resource for Merge** button.
- 5 Continue selecting **Resource Name(s)** to be merged, clicking the **Select Resource for Merge** button after each selection.
-  6 To designate the **Master Record** under **Resources to Merge**, click the **Resource Name** of your choice, and then click the **Select Master Record** button.
-  7 When finished, click the **Merge** button.
- 8 On the **Merge Resource Confirmation** dialog box, click **Yes** to confirm or click **No** to cancel.

### To clear your selections

-  On the **Merge Resources** screen, click the **Clear Search** button that is located between the **Resources to Merge** and the **Master Record** tables.

### To remove a resource from the merge

-  On the **Merge Resources** screen under **Resources to Merge**, click the **Resource Name** of your choice, and then click the **Remove Resource from Merge** button.

### To view information about a resource item

- On the **Merge Resources** screen under **Resources to Merge** or **Master Record**, click the **Resource Name** of your choice, and then click the **View Item** button.

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*You can also select the **Resource Name** from the **Search Results** table, click the **View Resource** button, and then click **View Resource**.*

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### To view request information

- 1 On the **Merge Resources** screen under **Search Results**, click the **Resource Name** of your choice.
- 2 Click the **View Resource** button, and then click **View Request**.
- 3 When finished reviewing the request, click **Close**.

### To view the home dispatch unit

- 1 On the **Search Results** table, click the **Resource Name** of your choice.
- 2 Click the **View** button, and then click **View Home Dispatch Unit**.
- 3 When finished reviewing the information, click **Close**.

### To change the status of a resource

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*Remember, before you can merge resources, all resource items must have a status of either available (at home - not on prepositioned incident) or unavailable.*

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- 1 On the **Resource** or **Status** menu, click **Resource Status**.
- 2 On the **Resource Status** screen, search for and then click the **resource** of your choice.
- 3 Click the **Select Status** drop-down arrow, and then select one of the following
  - click **Available** to change the status of the resource item to available
  - click **Unavailable** to change the status of the resource item to unavailable, and then click the **Unavailable Reason** drop-down arrow and select the **reason** of your choice.
- 4 To save the changes to the available status for that resource, click the **Set Availability** button.

## Exploring the merge resources function in detail

Remember these key points when merging duplicate resources:

- You can only merge local resources that are managed by the dispatch center performing the merge.

- To merge resources managed by different offices, you must first coordinate the resource transfer to the office that manages the master record.

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*For more information about transferring resources between dispatch centers, see the section “Transferring resource items,” in the chapter “Resource Item - working with resources,” in this ROSS User Guide.*

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- All items you select to be merged must be from the same catalog and category. *For example, Aircraft/Airtanker, Equipment/Engine, or Overhead/Positions.*
- All items must have the status of either
  - available - at home and not on prepositioned incident
  - unavailable.
- If merging any overhead resources that were imported into ROSS, the selected master record **must be** an imported resource, rather than a hand-entered record. Imported resources display a record source of “IQS” or “IQCS.”
- You can select a removed resource as a master or a merged resource. If selecting it as the master record, it remains removed even after the merge.

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*For more information about removing resources, see the section “Removing and deleting resources,” in the chapter “Resource Item - working with resources,” in this ROSS User’s Guide.*

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- ROSS copies the assignment history of all merged resources to the surviving master record. The master record may have overlapping assignment histories.
- Once merged, ROSS physically deletes the merged resources from the database.
- The master record has an autodoc entry that identifies the items merged into it, the date and time, and the user ID that performed the merge.
- For contracted resources, the master record replaces merged resources on any contract they may have been on. You can choose to be notified when a merged resource is removed and replaced on a contract that is managed by your dispatch center.
- If a merged resource has a master roster, that roster is deleted.
- If a merged resource is assigned to a position on a master roster, it is removed and replaced by the master record. You can choose to be notified when a merged resource is removed and replaced on a master roster that is managed by your dispatch center.
- You can not merge or select as a master record a resource assigned as the parent or to a subordinate position on an open assignment roster. Instead, ROSS advises you of which dispatch center is filling the assignment roster.
- When merging resources with different names, the name of the master record is copied to all closed/completed requests for the merged resource(s).

- When merging an overhead resource with Web Status access, the Web Status account is deleted and is not copied to the master record.
- When merging overhead resources with ROSS user accounts
  - user accounts of those merged resources are deleted and not copied to the master record.
  - if the master record also has a user account, only the roles assigned to and the personal settings of the master record remain after the merge.
  - all access to dispatch organizations that had been granted to the merged resources are deleted and not copied to the master record's user account.
  - requests and/or incident documentation attributed to that user are unaffected by the merge.
- User-entered documentation from any merged resource is copied to the master record.
- If a resource item has been transferred to your dispatch center but the transfer is not complete, such as waiting for a new provider organization to be designated, then you can not designate that resource as the master record in a merge. However, those resources with incomplete transfers may be merged into a master record.