Building & Managing Master Rosters for ROSS Overhead Groups

***In order to complete the steps listed in this tutorial, you will need (minimum) Basic User and Roster Manager privileges in ROSS. If you are managing a roster for an Incident Management Team, the Incident Management Team role may also be helpful. If you do not see the Roster menu item under the Resource dropdown, you do not have the necessary access. Contact Rocky Mountain Area Coordination Center for access to IMT rosters.***

FINDING YOUR MASTER ROSTER

Once logged into ROSS, click the Resource menu on the top menu bar. Select Roster from the dropdown.

You will then see this pop-up window:

(NOTE: If this window does NOT appear or you need to get back there to look up a different roster, simply click the Search button on the main Roster screen.)
Find the Overhead Group for which you wish to create/edit a Master Roster by selecting Catalog > Overhead, then type the IC’s last name with an asterisk (*) on each end into the Resource Name box. For most searches, you will want to leave the default radio button selected next to Roster or No Roster.

*(NOTE: This is known as a wildcard search, and can be used in any user-entry field in ROSS.)*

Click the Search button, then in the Search Results box, click to highlight the team whose roster you wish to edit. *(If your resource item is not listed, contact RMACC or your local dispatch center.)*

Click OK.

If you click the View button at the bottom of the Search Resources screen, you will see a pop-up window with details about the resource item selected in the search window:
Each tab in the **View Resource** window holds important information about the resource item. No information may be edited from this screen. If you notice a mistake or have questions about what is listed for a particular team, please call RMACC.

After you click **OK** from the **Search Resources** screen, you will be taken to this screen to create/edit the Master Roster.

*(NOTE: For simplicity, this tutorial was created using screenshots from an existing roster. However, the process is the same whether you are creating a roster from scratch or editing an existing one.)*
ROSTER SCREEN

We’ll start with an explanation of the buttons at the top right:

- **Search** takes you back to the previous screen to select a different Roster.
- **View Resource** shows the same resource item details as you viewed on Page 3.
- **Documentation** shows user-entered documentation for the current roster.
- **Edit** allows you to rename and create versions of the current roster. *(Please contact RMACC before renaming a roster!)*
- **Delete** is self-explanatory. Once a roster is deleted, you CANNOT get it back! *(Please contact RMACC before deleting a roster!)*
- **New** will only appear as an option if the selected resource item does not have an existing roster.

**Primary Roster Position** pane lists all of the positions currently assigned to your Master Roster, their restriction, and the resources currently assigned to each position.

**Print** will open a Cognos window (Internet Explorer) to display a printable/saveable ROSS Reports version of the current state of the Master Roster.

**Add/Swap Roster Resources** pane allows you to select the resource that will be assigned to a roster position, as well as list alternates for each type of position on the Master Roster.
ADDING POSITIONS TO MASTER ROSTER:

Click the **Action** button and select **Add Position**.

You will then see this pop-up window. Choose the **Overhead Catalog** and **Positions Category**, then click **Search**.
Highlight the position you wish to add to the roster from the Catalog Item list, then enter the appropriate number in # Positions.

Confirm the Restriction for the position (Qualified, Trainee Acceptable, Trainee Required). NOTE: All IMT Primary Trainee positions should be restricted to Trainee Required.

When you’re ready, click Apply to add your position(s) to the current roster.

NOTE: This screen will remain open after you click Apply, so you can keep adding positions until you are finished. Then click Close.

Newly-added position(s) will be added to the bottom of the roster:

To move a position up or down, find the position you want it to appear before and note the number in the far-right column for that position.

Enter the line number of that position in the Set To # box and click the button.
You will now see your new position in its new location, and notice the position that was in that position number is now occupying the next slot down.

You can also use the Up/Down arrows on the right side to move positions within the roster, but this is a slower process than setting the position number.

DELETING POSITIONS FROM MASTER ROSTER:

To delete a position, simply highlight it in the Primary Roster Position pane, click Action and select Delete Position.

Click Yes in the pop-up confirmation window.
CHANGING THE POSITION RESTRICTION

In the Primary Roster Position pane, click **Action** and select **Change Restriction**.

**NOTE:** All Primary Trainee positions should be rostered with the **Trainee Required** restriction. **Trainee Required** restriction will not allow a fully-qualified resource to be assigned to that position. **Trainee Acceptable** should only be used if a trainee is acceptable in a position that will not have a rostered resource, and is listed on the **On-Call** roster as “Vacant-Please Fill.”

In the pop-up window, use the dropdown to select the preferred restriction, then click **OK**.

You will be returned to the Roster screen, where you can see the position(s) with the changed restriction.

**NOTE:** To update multiple positions simultaneously, hold **Ctrl** while clicking the desired positions, then follow the same steps as described.
ASSIGNING RESOURCES TO MASTER ROSTER POSITIONS

In the Primary Roster Position pane, highlight the position to which you wish to assign the resource. 

NOTE: Even if a position already has a resource assigned, you can assign a different resource without removing the existing one first.

In the Add/Swap Roster Resources pane, choose the resource you wish to assign. 

This can be someone in either the Inventory or Alternates tab. 
(See instructions for adding alternates.)

NOTE: Because the IMT resource items are managed by RMACC, the only resources that will appear in the Inventory tab are those for which CO-RMC is the home dispatch center. If you are rostering at a different center, the tab will show resources local to that center when the Local Inventory radio button is selected.

If the resource you are looking for is not listed in either tab, click the Non-Local Inventory radio button to activate that field and enter the unit ID for the resource’s DISPATCH CENTER, not their home unit ID.

Click the Filter button, and all resources meeting the qualification and restriction requirements for the selected position will populate the lower block.

4/18/2014
Once you have highlighted the resource to be assigned, click **Add/Swap** to fill the roster position.

**NOTE:** This pane also allows you to view information about the highlighted resource and his/her home unit by clicking the **View** button.

**ADDING ALTERNATES TO ALTERNATES TAB**

From the **Add/Swap Roster Resources** pane, you can highlight the desired resource and click **Add As Alternate**. This function will add the resource to the **Alternates** tab, making finding them in the future **much faster**! Now you won’t need to look up that resource by his/her dispatch center first.