

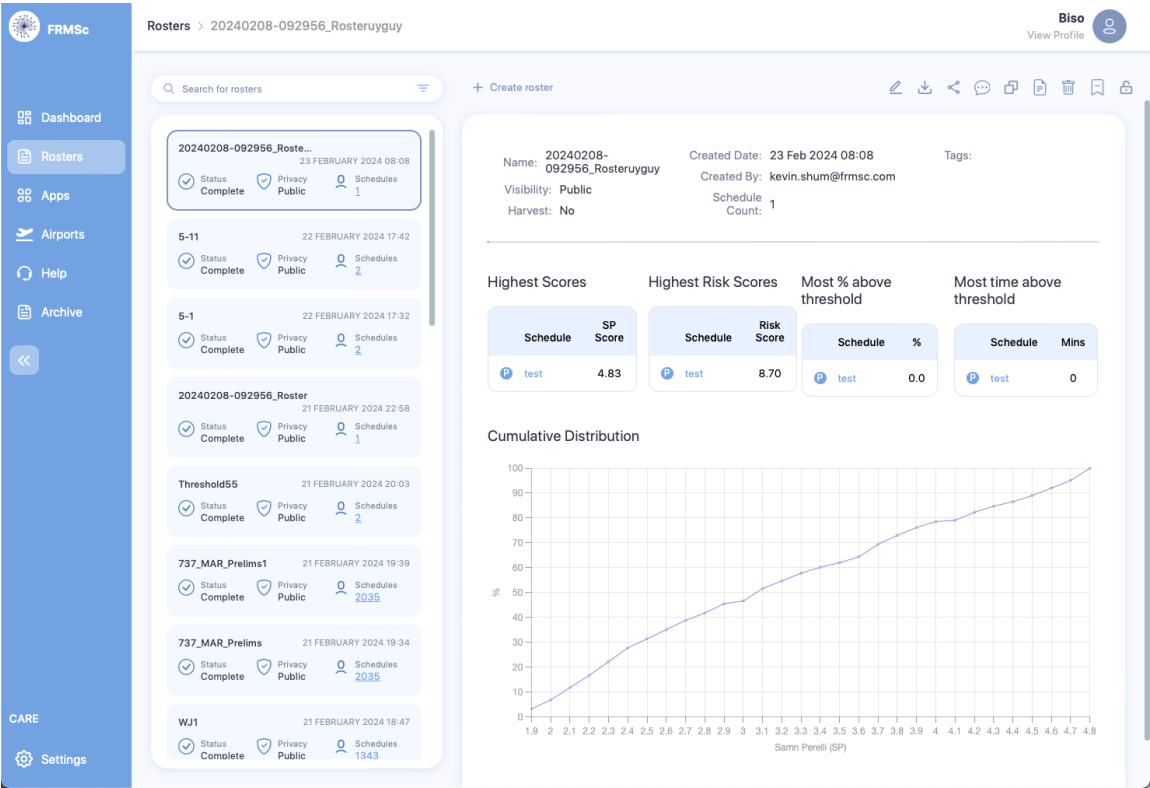
How to work with rosters



Scope of this guide

This guide is focused on working with rosters using the SAFE web application. If you want to learn about API interactions see [FRMSc API documentation](#) or [Apps](#).

You can manage rosters through the [Rosters](#) screen.



You can perform the following actions through this screen.

Create a new roster

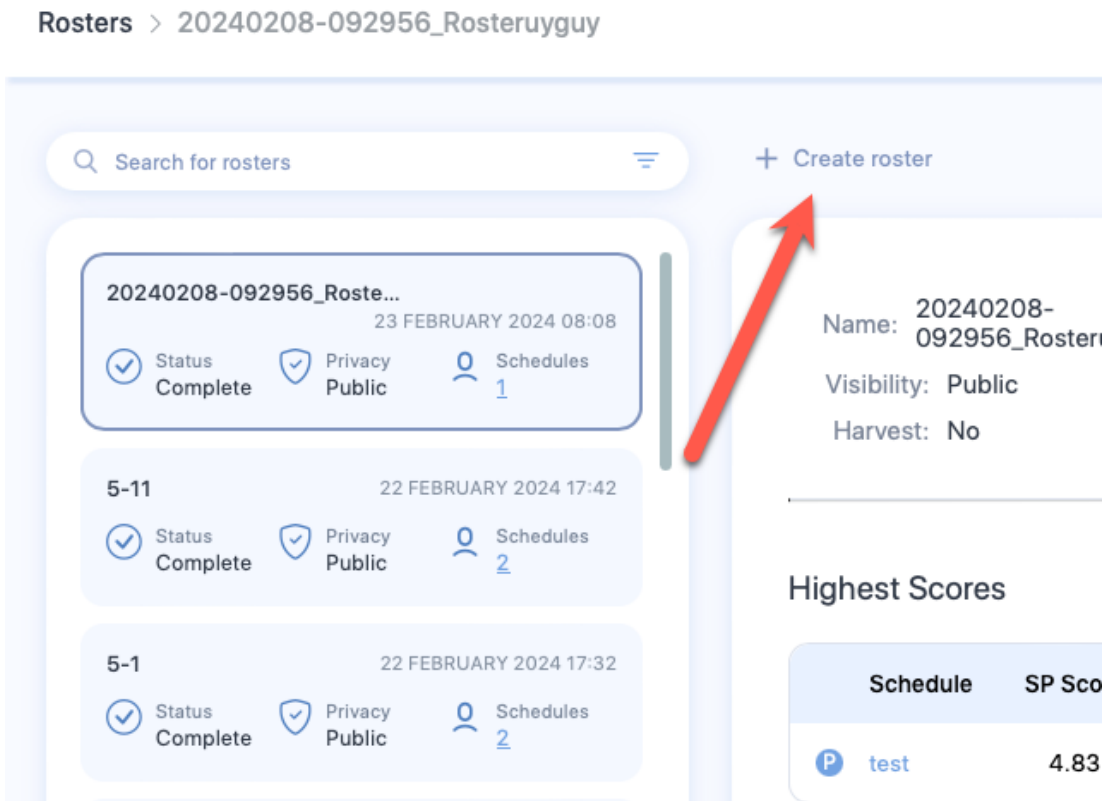
Create manually

 The workflow

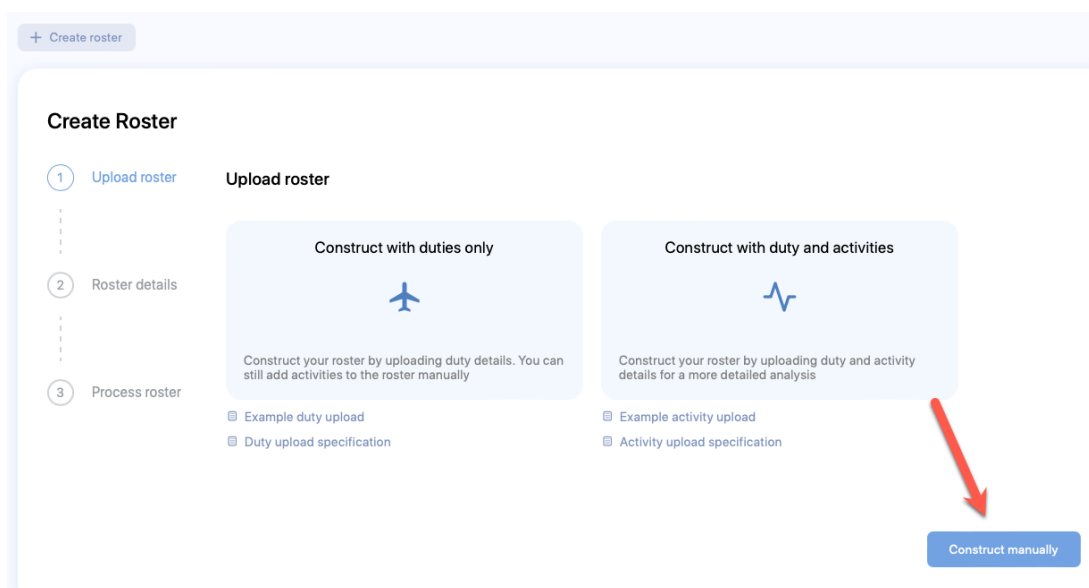
Creating roster is the initial step in a larger workflow. The steps below isolate creating roster from that workflow. To learn how to create a new roster as part of the entire workflow, see the Individual entry method in the [How to load data into SAFE](#) guide.

To create a new roster manually:

- 1. Click the **+ Create Roster** button to create a new roster.



- 2. The **Create Roster** screen appears. Click **Construct manually**.



3. Enter the values into the property fields. See [Roster properties](#) for more information on each property.
4. Click **Next**. Your roster will be created.
5. The **Create schedule** form will appear. You can continue adding a schedule to the newly created roster, following [the entire workflow](#) or cancel the form to return to this roster later. If you are returning to create a schedule and seek a guide, see [Create a schedule manually](#).

Create by bulk upload

To create a roster by bulk upload method, see the Bulk upload method in [How to load data into SAFE](#).

View a roster

There are multiple ways to view or search a roster. However, we recommend that you familiarise yourself with the [roster card](#) first.

Roster card

A roster card is an item that represents a roster in the roster list. It shows you key details about the roster. See below for an image of the roster card and the description of each label (numbered) on it.



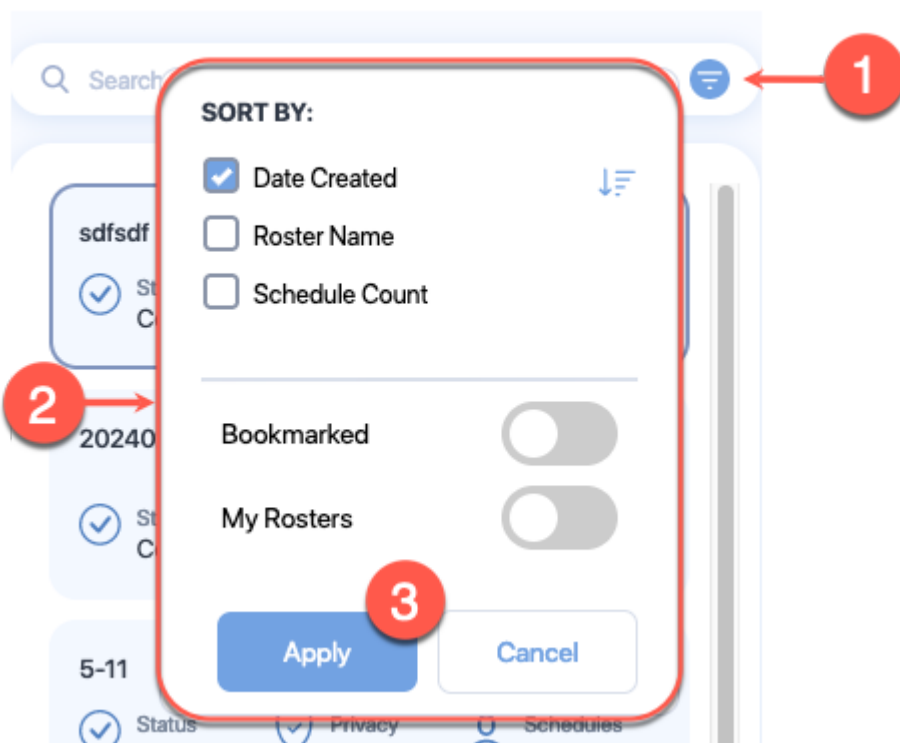
1. The name of the roster
2. The visibility of the roster
3. The date this roster was uploaded or created
4. The total number of schedule data in this roster
5. The status of processing for this roster

Simple search

Type the roster name in the Rosters screen's search bar to search for a roster. Then, click on the card associated with the roster to open it and view its details.

Advanced search

You can perform an advanced search on your roster list. To perform an advanced search:



1. Click the Advanced Search icon at the end of the search bar.
2. Search options appear that allow you to make search adjustments. See the [Advanced search properties](#) below for more information on each property.
3. Click **Apply**.
4. Click on the card associated with the roster to open it and view its details.

Scroll roster list

You can also scroll through the list of rosters to find a roster. Click on the card associated with the roster to open it and view its details.

Roster analysis

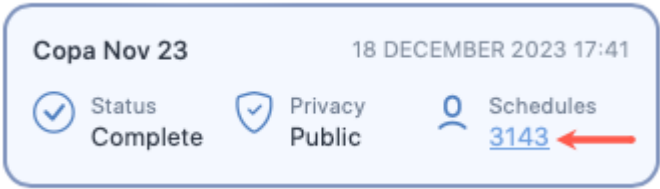
See [Roster analysis](#) for more information.

View schedules

To view schedules associated with a roster, you must be in the Rosters screen. Follow the steps below to view a schedule.

1. Find the roster, whose schedule you want to view.

2. On the roster card that appears on the list of rosters, click the link below the schedule.
This number on that link is the total number of schedules associated with that roster.



3. The [Schedules](#) screen will open showing a list of schedules associated with that roster.

Share a roster

You can share private and public rosters. You can share a roster with colleagues in the same organisation, SAFE and CARE licencees in different organisations, and individuals, who are outside your organisation, without SAFE and CARE licence. However, restrictions apply.

If you share a roster, private or public, with someone within your organisation or SAFE and CARE licencees in different organisations, they will get a copy of the roster, which they will own. They can't edit the original but they can edit the copy.

A recipient who is neither a licenced user of SAFE and CARE nor a colleague, they can only view but not edit the copy of the roster. To help you understand these restrictions, we have prepared a roster share matrix (shown below).

Visibility			
		Public	Private
Recipient	Internal	• Receives a copy of roster or schedule • Can't edit the original • Can edit the copy • Can view the copy	• Receives a copy of roster or schedule • Can't edit the original • Can edit the copy • Can view the copy
	External (with license)	• Receives a copy of roster or schedule • Can't edit the original • Can edit the copy • Can view the copy	• Receives a copy of roster or schedule • Can't edit the original • Can edit the copy • Can view the copy
	External (without license)	• Receives a copy of roster or schedule • Can't edit the original • Can't edit the copy • Can view the copy	• Receives a copy of roster or schedule • Can't edit the original • Can't edit the copy • Can view the copy

How to share roster?



Edit a roster

See [roster control bar](#).

Delete a roster

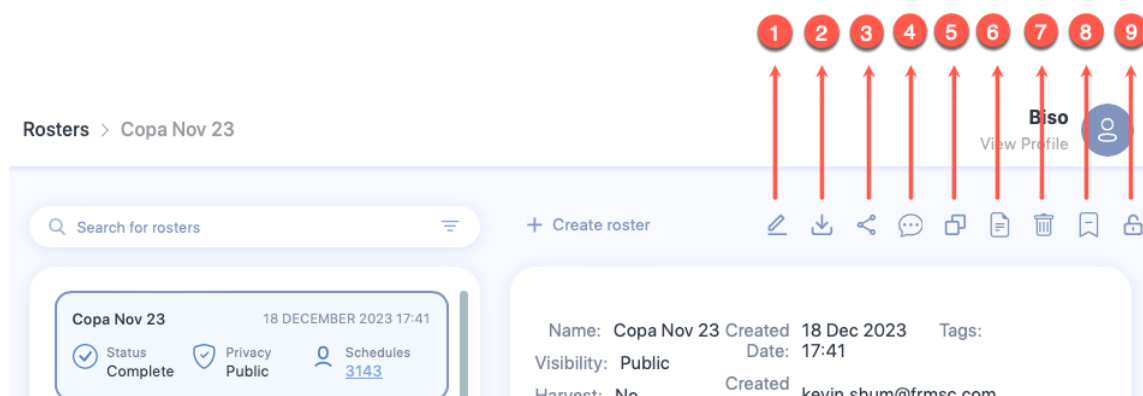
See [roster control bar](#).

Access the roster control bar

Access control

Only the user who locked a roster can unlock the roster, except for administrators.

The roster control bar appears on top right of each open roster. The control bar features a rich set of icons that control various functionalities related to the roster.



1. The **Edit** icon lets you edit the roster properties. See [Roster properties](#) for a list of properties that you can edit.
2. The **Download** icon lets you download the roster analyses. If you click on this icon, the **Download Roster** box appears which lets you choose the format of the files that you want to download. Upon continuing, a folder containing multiple files is downloaded. These files will contain the following data.
 - Schedule
 - Alertness

3. The **Share** icon lets you share the roster with people in your company. If your company administrator has enabled sharing externally for you, you can also send the roster analyses in an email to the people outside of your company. See [Share a roster](#) for more information.

[How to share roster?](#)

4. The **Comment** icon lets you add a comment to the open roster. If you click on this icon, the **Comment** box appears which lets you view existing comments in the roster or add a new comment in the roster.

[How to add comments to a roster?](#)

5. The **Copy** icon lets you create a duplicate of this roster. If you click on this icon, the **Copy Roster** box appears. You need to change the title of the Roster and click **Copy** to create a duplicate roster.
6. The **Generate roster file for upload** icon, unlike the **Downloads** icon, downloads only the roster data but not the analysis so that you can use the roster data to upload to a different instance that your company operates. If you click on this icon, the **Generate roster** box appears which lets you download the roster data as CSV.
7. The **Delete/Archive Roster** icon produces a dropdown menu that has two options - **Delete Roster** and **Archive Roster**.
- a. If you click on Delete Roster, you will be prompted to confirm your action. If you confirm the delete action, the roster will be deleted from your instance and the rosters list will refresh to remove the roster.
 - b. If you click on Archive Roster, your roster will be archived. See [Archive](#) screen for more information on archived roster.
8. The **Bookmark** icon attaches a small bookmark icon on top of this roster's card. You can view the icon on top of this roster's card when you search for this roster. Bookmarking a roster lets you search the roster using the [Advanced search](#).
9. The **Lock** icon lets you control any new changes to this roster. If you click on this icon, a lock will be placed disabling anyone to change the roster. After a lock is placed, this icon will be replaced by the **Unlock** icon. If you click on the Unlock icon, the roster can be changed.

[How to lock or unlock a roster?](#)

Table of properties

Roster properties

 Create roster form

Property (* required)	Description
Name *	The name of the schedule. Usually the identifier of the pilot or the crew member e.g., employee number
Visibility	If other users should not be able to see the roster, choose Private else choose Public
Tags	The label attached to the Roster which can be used to group rosters together.

Advanced search properties

Property controls	Property	Description
Sorting	Date Created	Check this box to sort the rosters by the date they were created. It is the default sorting option. You can also see descending sort () or ascending sort () icons next to the Date Created property. Click on these icons to toggle between ascending or descending sort.
	Roster Name	Check this box to sort the rosters by their names. You can also see descending sort () or ascending sort () icons next to the Roster Name property. Click on these icons to toggle between ascending or descending sort.
	Schedule Count	Check this box to sort the rosters by the number of schedules in a roster. You can also see descending sort () or ascending sort () icons next to the Schedule Count property. Click on these icons to toggle between ascending or descending sort.

 icons next to the Schedule Count property. Click on these icons to toggle between ascending or descending sort.		
Roster visibility	Bookmarked	Enable this property to only show bookmarked rosters.
	My Rosters	Enable this property to only show rosters that you created or uploaded.