Training Session Agenda - Instructor

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<tr><th>Unit</th><th>Session</th><th>Instructor</th><th>Time</th></tr>
<tr>
<td>1 - INTRODUCTION</td>
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(Instructor text located in e-ISuite Introduction Unit materials under Instructor Curriculum> Unit 1 –Introduction> Instructor Notes.)

Introductions
Logistics
Class Schedule

OVERVIEW
(Student version of this material is available on the website under Helpful Resources > READ ME FIRST–Intro to e-ISuite.)

Training Materials - http://eisuite.nwcg.gov walk-thru

User Support Menu

Help Desk Info/contact
Helpful Resources
Numerous reference documents
Instructor Curriculum
NAP
How to get a NAP Account
Online Tutorials
Narrated self-paced sessions
Quick Reference Cards
User Guides
Printable/downloadable references

e-ISuite vs I-Suite – differences

Differences between I-Suite and e-ISuite
Differences between Enterprise and Site
When/Why use Enterprise vs. Site

Security

Rules of Behavior
Security Principles
PII Data
e-ISuite User Accounts

ROLES – brief description
(User Roles PPT is available.)

User Role Definitions:

Privileged User roles

Account Manager
Data Manager
Geographic Rates Manger
Global Reference Data Manager
Help Desk

Non-Privileged User roles

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	▪ Data Steward ▪ Check-In/Demob ▪ IAP ▪ Time ▪ Cost • Account Manager o Enterprise ▪ User Account management ▪ Assigning user roles ▪ Auditing o Site ▪ User Account setup/management ▪ Assigning user roles ▪ Auditing ▪ Database management o Both ▪ Enable/Disable Users ▪ Disconnect User Session • Data Steward o Create incidents ▪ Reference Data o Assign users to incidents o ROSS Import o Financial Export o Data Transfer • Check-In/Demob • Incident Action Plan (IAP) • Time • Cost		
2 – SITE INSTALL	**GETTING STARTED** *(Three PPTs are available in Instructor Curriculum>Unit 2>PPTs.)* Before You Begin be familiar with: • Basic Personal Computer Concepts • Internet Navigation • Function Keys • Operating system (i.e. Windows 7, Windows 8, etc.) • Logging into and out of a computer. System Requirement minimums for computers: • Internet Browser, preferably Internet Explorer • Adobe Flash Player • Appropriate internet address for the e-ISuite system to be accessed. • Javascript must be enabled in the browser.		

SITE Install

Install Site Database

- Set up Database
  - Incident – Standalone user
    - Use website to download Site version.
- Initial Account Manager user account
  - Logging into e-ISuite
    - Home Page
      - User information, System Information, External Links, Message Board, Help, Log-out
      - User Preferences
- Create other user accounts
  - Add, Edit, Delete Site user accounts
  - Export User accounts <u>from</u> Site
  - Import User accounts <u>to</u> Site
  - Change passwords for Site users

Only if the Site Account Manager re-sets the password

- Setting the Training System Date

Create an Incident – 3 methods:

NOTE: *All require Data Steward Role*.

1. **Manually** create an incident
   - Add, Edit, Delete Incidents
   - Add Accounting Codes
2. **Transitioning** the FROG Incident File
   - Data Transfer
     - Transition Incident from Enterprise to Site
     - Site Retrieves data from Enterprise
3. **ROSS Import** - RIVER Incident
   - ROSS Import Overview
     - Site/Enterprise same
   - Rules for Importing, Excluding and Matching Resources
   - Upload/Delete a ROSS Data File
   - Import ROSS Incident Data from Enterprise
     - Match Incident
     - Match Resources by Request Numbers and Resource Names
     - Match Resources by Request Number
     - Match by Resource Name and Item Name
     - User Matches
     - Unmatched Resources
     - Exclude Resources
     - Primary and Secondary Resources

- Data Conflicts
- Incident Jurisdiction
- Review and Complete
- Import Process Status
- View Excluded Resources

- Import Excluded Resources
- Manage **Site** Database:
  - Create a New Database
  - Copy a Database
  - Edit a Database
  - Manually Backup a Database
  - Restore a Database
  - Remove a Database
  - Recover a Database Password
- Account Recovery in **Site**:
  - Generate encrypted code
  - Generate site access key
  - Create new Account Manager account

Filters and Icons: (examples available in Intro/Overview PPT)

- Filters
  - Category Filters
    - All – people and non-people
    - Aircraft
    - Overhead
    - Crews
    - Equipment
    - All Personnel – people only
    - All Non-Personnel
  - Exclude Filled/Exclude Demob/Reassigned
  - Resource Selected in the Grid (Demob/Cost)
  - Time
  - Grid Filters
    - Column Sort – click on title to order ascending or descending column data
    - Move Columns
    - Filter as forward type
    - Drop Downs
    - Calendar
    - Clearing Filters
    - Shuttle Buttons
    - Arrow expansion - view subordinate resources
- Manage as Group
- Icons

	▪ Customize Grid Columns – choose columns and order ▪ Refresh Grid Data ▪ Clear Grid Filters ▪ Expand/Collapse Grid ▪ Customize Data View – Enterprise only – choose incidents to view ▪ Search Incidents – Enterprise only – search list of incidents • Resize Bars **Multiple Session Management** **User Session Time Out** **Logging out of e-ISuite**		
	FUNCTIONAL AREAS		

3 – CHECK-IN	Manage Check-In Settings
	• Quick Stats Settings
	• Other Field Labels
	• Default Check-In Date and Time
	  o Blank
	  o System Date
	• Quick Stats Button
	
	Add Resource
	• Mandatory Common Data Fields
	• Check-In Steps
	• Check-In Data
	• Check-In Remarks
	  o Other Fields
	• Qualifications (person checkbox checked)
	  o Edit
	  o Delete
	
	Edit a Resource
	• Editing Primary and Subordinate Resources
	
	Delete a Resource
	
	Group Check-In
	
	Roster Resources
	• General Points
	• Common Data
	• Advantages of Rostering
	• Strike Team/Task Force		

	• Roster Resource Propagation Popup
	• Unroster – not included in User guide
	
	Roster A New Resource
	• Roster Existing Incident Resources (Check-in, TIME/COST)
	
	Reports (from the Reports button)
	• Resource Reports
	  ○ Sorts, filters, date ranges
	    ▪ All Resources
	    ▪ ICS-209 Resource Count
	    ▪ Qualifications
	    ▪ StrikeTeam/Task Force		

4 - TIME	Managing Time Data for a Single, Overhead Resource
	
	Time Postings for an AD Resource
	
	Time Postings for an Other Resource
	
	Time Postings for a FED Resource
	
	Managing Time Postings
	• Editing a Time Posting Entry
	• Deleting a Time Posting Entry
	
	Manage Admin Offices for Payment
	
	Posting Time Adjustments
	• Editing an Adjustment
	• Deleting an Adjustment
	
	Generating an OF-288 Invoice
	• Deleting an Invoice
	
	Managing Time Data for a Crew
	• Propagate FED Employment Type
	• Propagate OTHER Employment Type
	• Propagate Mailing Address
	• Mixed Crew Employment Type
	
	Rostering Crew Members
	
	Posting Crew Time
	• Posting Time for an Entire Crew
	• Posting Different Time for Single or Multiple Crew Members
	  ○ Posting to All and then Editing the Exceptions
	  ○ Post to All Except the Crew Members that are		

	Different ○ Editing Crew Time ○ Deleting Posted Crew Time ○ Post Adjustments for Crew Resources ○ Printing an Emergency Fire Fighter Time Report for Crews ○ Deleting an Invoice for the Entire Crew • Deleting an Invoice for a Single Crew member Managing Time Data for Contractor/Cooperator • Reviewing or Editing Common Data • Contractor information on the Time Data tab Manage Contractors Rostering Resources to Contractor/Cooperator Posting Time for Contractor/Cooperator Resource • Posting Time to a Contractor/Cooperator Resource with OF288 Subordinates • Edit Posted Contracted Time • Deleting Posted Contracted Time • Post Adjustments for OF286 Resources • Printing an Emergency Equipment Report (OF286) Time Reports		
5 - IAP	IAP Settings • Options ○ Name Order ○ Include Filled Checkbox • ICS 203 Template • ICS 204 Template ○ Block 4. Operations Personnel ○ Block 5. Resource Assigned This Period ▪ Resource Name ▪ Request # ▪ Item Code • Master Frequency List ○ Add a New Frequency ○ Import a Master Frequency List ○ Edit an Existing Frequency List ○ Delete an Existing Frequency List ○ Export a Master Frequency List ○ Propagate Changed to Unlocked Forms Create a Plan ○ Naming of the Plan/Operational Period ○ Tree view		

	• ICS 202 Incident Objectives • ICS 203 Organization Assignment List • ICS 204 Division/Group Assignment List • ICS 205 Incidents Radio Communications Plan • ICS 206 Medical Plan • ICS 220 Air Operations Summary Manage Forms • Edit a Form • Copy a Form • Lock/Unlock a Form • Preview/Print a Form • Delete a Form Manage IAPs • Edit a Plan • Copy a Plan • Lock/Unlock a Plan • Add External Attachments • Preview/Print a Plan • Delete a Plan		

6 - COST	Edit Resource Data
	• Edit Common Data
	• Edit Cost Specific Data
	• Add/Delete a Resource
	
	Manage Daily Costs
	• Daily Cost Records
	• Create, Edit, Delete Daily Cost Records
	• Manually Add Daily Cost Records
	• Update Rates after a Rate Change
	• Cost Level
	• Aircraft Costs
	
	Incident Cost Settings
	
	Cost Rates
	• View Rate Groupings by Agency
	• View Rate Groupings by Item Code
	• Update Rates
	    ○ All Item Codes
	    ○ Overhead
	    ○ State/Cooperators Custom Rates
	
	Cost Accruals
	• Guidelines for US Forest Service accruals
	• Reportable US Forest Service Accrual Categories
	• Accruals Crossing Fiscal Year Rules		

- AD Drawdown
- AD Drawdown and Fiscal Year Rules
- Extracting/Finalizing Cost Accruals
- Accrual Accounting Code
- Accrual Reports
    - Cost Accrual Summary
    - Cost Accrual Detail Report
    - Cost Accrual Detail All Report

Cost Projections

- Creating and Editing Cost Projections
    - Add a Cost Projection
    - Edit a Cost Projection
    - Delete a Cost Projection

- Resource Summary
    - Resources Summary
        - Manually Added Item Codes
        - Add, Edit, Delete Item Codes
    - Support Costs

- Cost Projection Worksheet
    - Update Item Codes
    - Update Support Average Cost

Update Resource Summary Button
Update Worksheet Button
Creating a Projection Report

Manage Cost Groups

- Add a new Cost Group
- Edit an existing Cost Group
- Delete an existing Cost Group
- View Agency Percentages
- Edit Cost Group Percentages
- Assign Resources to a Cost Group
- Generating Cost Share Reports

Cost Reports

- Group Category Summary
- Summary by Resource
- Summary for Current Day Report
- Detail by Resource Report
- Group Category Total
- Aircraft Detail Report
- Analysis
- Cost Share

	Other Functions • Financial Export o Requires Data Steward Role		

7 - DEMOB	Manage Demob Settings
	• Customize Check-Out Form (ICS 221)
	• Air Travel Questions
	
	Tentative Demob
	• Tentative Demob Data tab
	• Tentative Demob Remarks tab
	
	Group Pending Demob
	• Group Pending for Rostered Resources
	
	Actual Demob
	• Actual Demob tab
	  o Actual Release Date/Time
	  o Rest Overnight
	• Actual Demob Remarks tab
	
	Group Actual Demob
	• Group Demob for Rostered Resources
	
	Demob Reports buttons (within Demob)
	• Check resources in the grid check box
	  o Tentative Poster
	  o Available For Release
	  o Air Travel Request
	  o Checkout (ICS 221)
	  o Actual Demob
	  o Ground Support
	
	Planning Reports (from the Reports button)
	
	  o Demob Reports
	    ▪ Same reports as Demob button
	      • Sort, filter, date range options
	    ▪ Last Work Day
	      • Only found under Reports button		

8 - CUSTOM REPORTS	• Custom Reports Overview o Layout & Functionality • Add a Custom Report		

	o Report Information o Column Builder o Criteria Builder o Sort Builder o SQL Viewer • Generate a Custom Report o Custom Report Template: ▪ Manage ▪ Copy ▪ Edit ▪ Delete ▪ Export ▪ Import		
9 - ENTERPRISE	<u>NAP Accounts</u> • Use in Enterprise • NAP Account Process – see NAP website <u>Enterprise</u> Account Manager Role: User Accounts Overview • Logging into Enterprise • Adding Users from NAP • Password changes done through NAP • Editing User Accounts • Deleting User Accounts Recover Account Manager/Create New Account Adding Users to an incident(s): • Adding a User Account to an Incident • Removing a User Account from an Incident • Adding Users from a User Group using the User Access List for a single incident. Add an Incident • Data Steward role required • Incidents – Add, Edit, o Delete Incidents o Adding Accounting Codes User Groups in Enterprise – Data Steward role required • Adding User Groups • Editing User Groups • Deleting User Groups		

Incident Groups – Data Steward role required

- Creating Incident Groups
  - Assigning Users to the Incident Group
    - Add Users
    - Add Users from Group
    - Remove Users
- Edit Incident Groups
- Delete Incident Groups

View/Hide Incidents

Resource Inventory Button

- Edit Permanent Resource
  - Resource Name
  - Item Code
  - Cell Phone
- Add Resource from Inventory - Enterprise
  - Choose Resource(s) from Inventory to add to incident
  - Complete Check-in data fields.
  - Roster from Resource Inventory
- Resource Inventory - Enterprise
  - Customize User Data icon
    - Include/Exclude

Restoring an Incident

- Site – backup copy
- Enterprise – call the Help Desk

Reference Data – Non-Standard (Enterprise/Site)

- Agencies
- Unit IDs
- Jetports
- Item Code