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## Introduction Unit - Instructor

### e-ISuite Introduction Unit

*Instructor: There are several ways to present the e-ISuite Introduction:*

- *Instructor led using the Intro PPT, students' attention on instructor, student computers closed.*
- *Students have Intro PPT on their computers, follow along with the instructor using the PPT to step them through.*
- *Instructor using actual screens, students' attention on instructor*

### **e-ISuite Introduction** (Inst. Intro PPT available on website.)

Welcome:

Introduce instructors.

Trainees introduce themselves.

Will students be using e-ISuite primarily at a Dispatch Office or on field incidents?

Student sign-in sheet optional.

Logistics:

Facilities: Restrooms, drink and snack locations, emergency exits.

Student Certificates:

This is not a pass/fail class. Students are encouraged to get as much out of the class as possible.

Class Schedule:

Start and stop times, lunch and break times.

Class will start at the time specified: (state)

Lunch and break schedule is: (state)

Topics:

Overview

- User Resources
- Differences Between I-Suite/e-ISuite and Enterprise/Site
- Security
- Common e-ISuite Application Features

e-ISuite Roles and Functional Areas

- Roles – Account Manager and Data Steward, new roles
- Functional Areas



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### Overview

**User Resources:** e-ISuite Website -- <http://eisuite.nwcg.gov>

Various training materials are available for students in several formats. These materials have been developed to accommodate student preferences for first time learning or refreshing on user roles and functional areas. All materials are easily accessible on the website.

- Helpful Resources – This link provides a listing of documents containing supplemental information for students, from a Site installation PPT to tips for writing custom reports.
- User Guides -- User Guides are available from the e-ISuite website.
  - Printable User Guides – User Guides can be printed by Section or in its entirety by clicking on the appropriate links on the website under User Guides.
    - For live classroom sessions, User Guides can be printed and a copy made available for each student.
- On-Line Tutorials – These sessions are automated/narrated short courses which can be downloaded and viewed to fit user needs. Specifics on software and computer requirements to view these sessions are outlined.
  - Students can locate and track their progress through the on-line Table of Contents.
  - These can be used as refreshers.
- Quick Reference Cards – These “cards” provide streamlined information on important topics.

### **Where to Get HELP**

- On-Line Help System – This is the On-Line Help function within the e-ISuite system, searchable by very specific topics within the system. Click the HELP button on the Home Page.
  - If you are at an incident, contact the incident CTSP.
  - For additional help, contact the e-ISuite Help Desk.
- The e-ISuite Website <http://eisuite.nwcg.gov> contains a wide variety of documentation, including:
  - ROSS Import
  - Updates



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- NAP Account Information

### System Differences:

With the advent of e-ISuite, there are significant changes which should be noted between the old and new systems as well as the new versions of Enterprise and Site.

#### Differences Between I-Suite and e-ISuite:

- Ability to roster any resource type to any other resource type
- Data Steward role now performs ROSS Import and Financial Import
- Revised Common Data area
- IAP forms generated based on the data entered and incorporate DHS format
- Improved ROSS Import process
- Ability for multiple cost records per day
- Improved Cost Projections process
- Changes/improvements in many reports

#### Differences between Enterprise and Site in e-ISuite:

##### Enterprise:

- Web-based – Internet required
- Typically used for Initial Attack, ABCD Misc, S&R, Training Support, Dispatch and Cache Support
- Type 3, 4 & 5 Incidents
- Housed at central location in Kansas City, MO
- Eventually interface with other systems: ROSS, ICBS-R, possibly agency payment centers
- NAP account required for all users.

##### Site:

- Functions similarly to I-Suite
- Installed on local incident server only – internet not required
- Incident may begin at Enterprise and transition to Site
- Type 1, 2 & 3 incidents
- All Site data transferred to Enterprise at incident closing
- NAP account not needed.



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### Security:

#### Rules of Behavior:

All e-ISuite users must understand and follow the Rules of Behavior, the security principles and practices, and know and practice their responsibilities regarding e-ISuite security.

**NOTE:** Some Incident Management Teams have a Rules of Behavior document that must be read and signed.

It is everyone's responsibility to safeguard the information that is collected, stored and maintained by the e-ISuite application.

The Rules of Behavior do not replace but enhance existing agency policies.

Users are to work within the confines of their authorized access or role. Users should not attempt to access other modules or screens in the e-ISuite application to which they do not have authorization. User accounts and additional roles can be granted by a user with an **Account Manager** role.

Security violations include, but are not limited to:

- Sharing of user name and password pairs.
- Sharing e-ISuite information or data with individuals who do not have an official need to know.
- Violating any other security policy or procedure.

If you leave your computer for any period of time, close the e-ISuite application. This will ensure that no unauthorized person can access the e-ISuite application while you are away.

#### e-ISuite Security Principles:

An Enterprise user must have a NAP account for access to e-ISuite Enterprise.

A Site user must have an active user account in a Site e-ISuite system in order to log into the Site e-ISuite application. The only exception to this rule is during the initial setup procedure when an initial **Account Manager** account is created. Each user must be assigned a unique user name and password to log into an e-ISuite Site system.

Only a user with **Account Manager** role can create User Accounts.



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The e-ISuite application includes an automatic backup feature that allows backup of the database as often as needed.

The Data Steward role performs the following:

- Create a new database.
- Copy an existing database.
- Switch between multiple databases.
- Edit a database.
- Perform a manual backup.
- Perform an Automatic Backup.
- Restore a database.
- Remove a database.

The requirements for a database password are:

- Must contain a minimum of 12 characters.
- Must contain at least 1 lowercase letter.
- Must contain at least 1 uppercase letter.
- Must contain at least 1 number.
- Must contain at least one of the following special characters:
  - !#%&\*^
- Cannot be a dictionary word.

e-ISuite databases should NOT be distributed to anyone except those outlined in other policies (e.g. to transitioning team, owning unit, or authorized personnel).

Before logging into e-ISuite you must read and agree to the security statement that displays.

### PII Data:

PII data is Personally Identifiable Information.

The e-ISuite application limits access to data based on roles assigned to User Accounts. A user can only access data that is relevant to their assigned role.

The e-ISuite database may contain PII data, such as Social Security Numbers (SSN), Tax Identification Numbers (TIN), address and phone information.

The SSN and TIN are encrypted in the database and are never visible to the user in e-ISuite.

All data export files are encrypted for security purposes to protect PII and other sensitive data.



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*The below information can be briefly run through here as an overview, or can be included in each unit where appropriate. Advise students that all below will be covered in depth in each section.*

### Common Features

*Instructor: Briefly describe these features. (Intro/Overview PPT provides visuals.)*

- Common screen features
  - Menus, sub-menus, Icons, Filter Bars, Grid Views, Handle Bars, Subordinate Resource triangle, Action Buttons.
- Icons
  - Customize Grid columns – Customize the columns the user sees in the grid. Columns can be moved by clicking, hold and drag to new location.
  - Customize Data View - Enterprise -- allows user to limit the number of incidents in the view.
  - Search Incidents – Enterprise – allows user to search complete available incident list.
  - Refresh Grid Data
  - Clear Grid Filters – clears all filters in the grid at the same time.
  - Expand/Collapse Grid – expands and collapses the grid and workspace views for the user.
- Filters

### e-ISuite Roles/Functional Areas

*Instructor: Briefly describe each role and functional area. (See PPT for more information on each role and functional area if not using the PPT as a class walkthrough.)*

#### Roles:

##### Account Manager

- Creates user accounts.
- Assigns user Non-Privileged/Privileged roles.
- Administers and monitors user accounts.
- Resets user passwords
- Creates initial Site Account Manager Account

##### Data Steward

- Creates and administers incidents/incident groups
- Assigns/imports users/user groups to incidents.
- Imports existing ROSS databases to e-ISuite
- Administers the Financial Export function.
- Administers Data Transfer actions.



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### Check-in/Demob

- Add/edit/delete/roster resources.
- Prepares resources for demob.
- Have access to Common Data section and functional section.

### IAP

- Creates the Incident Action Plan.

### Time

- Manages time records, creates payment documents and reports.

### Cost

- Analyzes and reports cost data.

## Functional Areas:

### Incidents Button

- Is a function of the Data Steward Role which can add/edit/delete incidents and incident groups.

### Check-in/Demob Buttons

- Check-in Module enters resource data.
- Demob Module prepares resources for release from an incident.
- Together have same access to screens, same permissions, can add and edit both functions.

### IAP Button

- IAP Module uses database information to create ICS forms for an Incident Action Plan.
- The user can create the following ICS forms in IAP: ICS202, ICS203, ICS204, ICS205, ICS206 and ICS220.
  - Create, copy, delete forms and plans.
  - Import PDFs to be added to a plan.
  - Export plan files.
  - Form data is input using drop-downs and lists which will be inserted/formatted in each form.
  - Depending on the amount of form data, the printed form will be adjusted to create form page(s) with complete data (headers/footers).

### Time Button

- The Time Module allowed the user to manage time records, create payment documents and reports.
  - Use this module to:
    - Post personnel, crew, and contract time.
    - Post commissary adjustments.
    - Edit roster data.
    - Print invoices (OF-286 and OF-288).

### Cost Button

- The Cost module is a tool to analyze and report cost data.
  - Use this module to:
    - Generate daily cost records.
    - View daily cost records.
    - Edit daily cost records.



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### Reports Button

Each functional area (Check-in/Demob, Time and Cost) has specific reports associated with it. These reports will be covered under each functional area during the course.

#### Custom Report Button Features:

- Allows users to create non-standard reports.
- Query Building Screens:
  - Report Information - Adds general report characteristics
  - Column Builder - Sets column parameters for report
  - Criteria Builder - Creates report “canned” SQL statements
  - Sort Builder - Provides sorting criteria
  - SQL Viewer - Able to view created SQL statements
- View Report as PDF
- Download data as Excel spreadsheet
- Copy, Export and Import Reports