CHECK-IN

Version 1.2.2

Wednesday, December 14, 2016

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Manage Check-In Settings

NOTE: At the beginning of an incident, make changes to Check-In Settings before using the Check-In function.

Follow the steps in this section to Manage Check-In Settings:

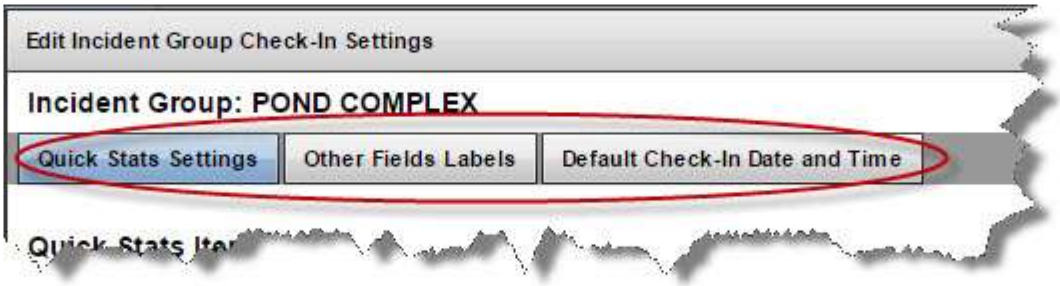
1. From the Home page click the **Incidents** button.
2. Select an Incident or Incident Group.
3. Select the drop-down arrow next to the Check-In Menu button.
4. Select **Check-In Settings**.

5. A new window opens with the default settings for the selected Incident.

NOTE: Three tabs will display: **Quick Stats Settings**, **Other Field Labels** and **Default Check-in Date and Time.**

NOTE: When an Incident Group is selected in the Enterprise system, one incident will be designated the Primary Incident for the group. Check-in settings for the Primary incident will default to all the incidents within the Incident Group.

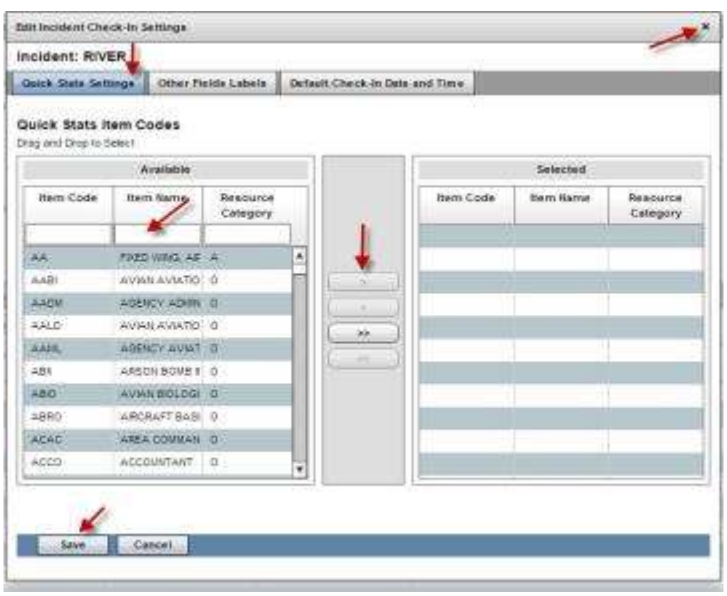
Once the Primary incident settings default as the Incident Group settings, further edits to Check-In Settings can be made by selecting the Incident Group and not the Primary Incident. See the information on Incident Groups in the Incidents User Guide section for more detail on Primary Incidents.



Quick Stats Settings

NOTE: Any change to Quick Stats Settings will show on all user screens for this incident or group of incidents.

1. Select the **Quick Stats Settings** tab.
2. Enter criteria in search boxes for Item Code/Item Name/Resource Category to narrow search.
3. Use the shuttle box to move Quick Stats Item Codes from **Available** to **Selected**.
4. Click **Save** to save the changes.
5. Click "**x**" to close the pop-up box.



NOTE: Quick Stats has three ways in which Item Codes are displayed on the

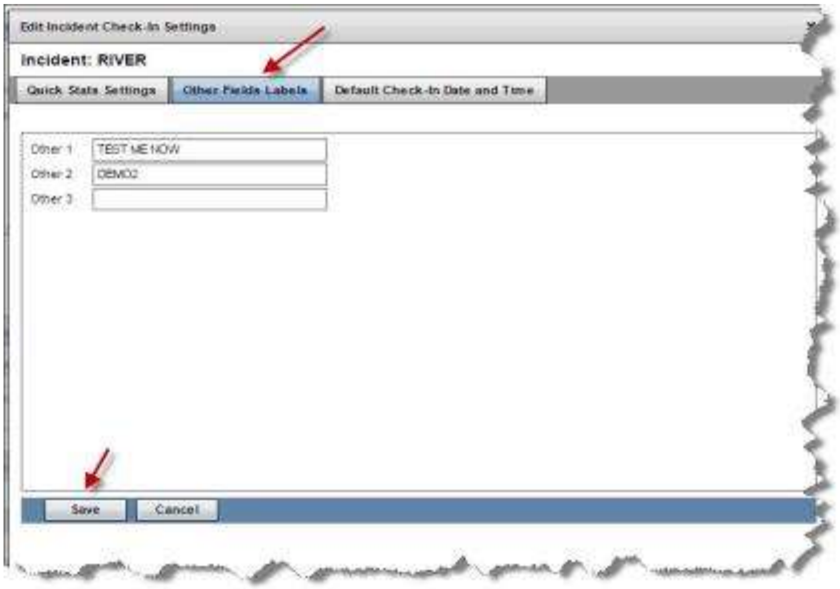
Quick Stats pop up screen.

1. There are system defaulted Item Codes. These Item Codes will not be found in the Available list of Item Codes. Default Quick Stats Item Codes are: HC1, HC2, HC2I, HCS1, HCS2. These Item Codes cannot be edited.
2. There are specific categories of Item Codes that will automatically display when the user checks-in any resources with those Item Codes. These Item Codes belong to the following categories of resources: Engines, Dozers and Water Tenders. This includes single and strike team configurations. These Item Codes are listed in the Available list of Item Codes, but do not necessarily need to be manually selected.
3. The user manually can enter any other Item Code(s) desired by selecting the Item Code from the Available list of Item Codes. Example would be if the user wanted to list DIVS or TFLD, these would need to be manually added to the Selected list of Item Codes, then saved.

Other Fields Labels

NOTE: The instructions in this section identify how to change the **Other** Field Labels. When collecting information such as medical qualifications, Team affiliation, vehicle IDs, etc. label these fields before check-in begins. Otherwise, different incident users may enter the data in different fields.

1. Select the **Other Field Labels** tab.
2. Change one or more **Other** field labels by entering data into the boxes next to Other 1, Other 2, and Other 3.
3. Click the **Save** button to save the changes.
4. Click "**x**" to close the pop-up box.

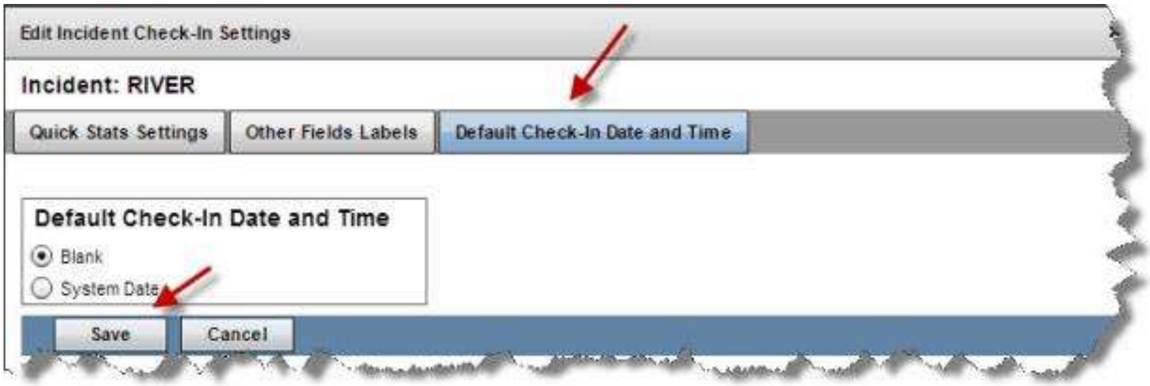


NOTE: The new labels will show on the Check-In screen in place of the default labels.

Default Check-In Date and Time

NOTE: If the system (computer) date and time is current, **Default Date and Time** is the easiest way to collect accurate check-in date and time. If entering check-in data after the fact, choose **Blank**. Choosing **Blank** will allow entering the data without having to first delete the system default.

1. Select the **Default Check-In Date and Time** tab.
2. Select to set the Default Check-In Date and Time to **Blank** or **System Date**.
3. Click **Save** to save the changes.
4. Click "**x**" to close the pop-up box.



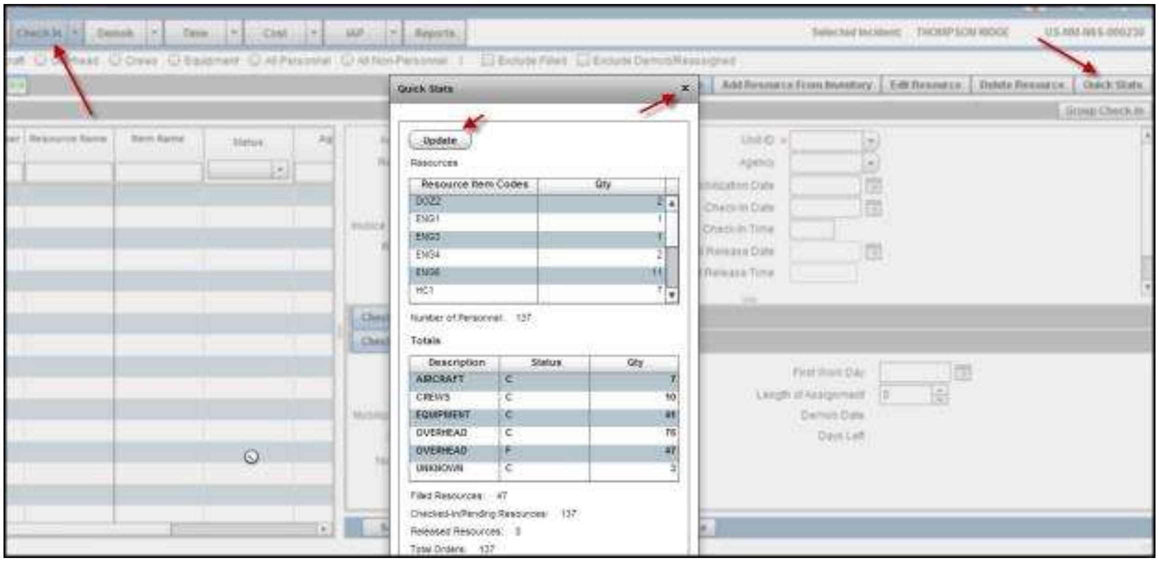
NOTE: When an Incident Group is selected, the default Check-In Date and Time setting applies to all Incidents included in the group.

NOTE: If the system default is changed, it will show on all check-in user screens for that incident or group of incidents.

Quick Stats

This function gives a quick summary of resource statistics on an incident. Only the Resources Item Codes can be modified through Check-In Settings/Quick Stats. Default Item Codes cannot be changed. Totals headings are static and cannot be changed.

1. From the Home page click the **Incidents** button.
2. Select an Incident or Primary Incident in an Incident Group.
3. Select the **Check-In** button.
4. Select the **Quick Stats** button.
5. Click the **Update** button to view the most current information.
6. Click "**x**" to close the pop-up box.



NOTE: Quick Stats provides a quick reference for resources grouped by Item Code (HC1, ENG6, etc.) and Category (E, O, C, A). Additions or removal of Item Codes provides a customized list. Handcrew Quick Stat Item Codes are already set as defaults.

NOTE:
Quick Stat totals are provided for Filled Resources (F), Check-In/Pending Resources (C, P), Released Resources (D), and Total Orders.
* The Resources section is counting Status "C" and "P" resources.
* Totals section lists all categories separately (Overhead - Status "C", "D", "F").
* Any UNK ROSS Item Codes will not be counted unless the Item Code is corrected.
* Filled Resources are those with Status = "F".
* Checked-In/Pending Resources are those with Status = "C" and "P".
* Released Resources are those with Status = "D" or "R".
* Total Order includes all resources regardless of status.

Resources Overview

Resources include all people, equipment and aircraft used at an incident. The e-ISuite System allows a user to perform the following procedures for all Incident Resources:

Manage Resources

- Add Resource
- Edit a Resource
- Delete a Resource
- Group Check-In
- Roster Resources

Add Resource

Check-In, Demob, Time and Cost can access the Common Data screen area for all resources. This is the upper screen area below the Add, Edit and Delete Resource buttons. There are additional buttons when logged in as TIME. These instructions cover only Common Data fields.

It is imperative that Check-In, Demob, Time and Cost personnel communicate with each other to ensure the integrity of data and avoid record duplication. The Check-In process is the primary data entry point for all e-ISuite data. Changes, additions, or deletions from any functional area affect the other e-ISuite functions.

NOTE: If a pop-up box displays with a Save button, be sure to click Save in the pop up box to save that data change and click Save at the bottom of a main screen to save all the data changes to the record.

Mandatory Common Data Fields

There are four mandatory fields which must be completed to save a resource to an incident. <u>A ROSS Import to e-ISuite will populate these fields automatically</u>. Review ROSS imported fields and edit if appropriate. If a resource is manually added, these fields must be completed by the user.

1. **Status:**

    - Defaults to “C” (checked-in) on initial/new resource check-in, and when rostering new resources.
    - Defaults to “F” (filled) when data is supplied thru a ROSS Import.

2. **Resource Name:**

    - As it appears in ROSS. ROSS Import Data follows ROSS data standards when importing to e-ISuite the Resource Name, Req#, and Mob Date. It may also include Agency and Item Code if those items are defined in ROSS.
    - If the resource uses a different resource name, a truncated resource name, or a nickname, the Resource Name can be edited to include or replace the ROSS entry.

NOTE: Any changes to a Resource Name affects the IAP module and potentially changes the ID Name for air travel reservations.

- ROSS Import Resource Names typically include parts of Item Codes and resource typing, making the default resource name unusable in the Incident Action Plan (IAP). The Resource Name can be edited, as needed.

  Example:
  - ROSS Import Name: HC1-Type-1-Crew Midnight Suns.
    - Data is duplicated in this name string. Crew typing is handled using the Item Code (HC1).
    - Resource Name at check-in: Midnight Suns.
    - IAP Module ICS204 Form: Midnight Suns.

NOTE: Additional information for the ICS 204 is taken from other data collected at check-in. Any additional data in the Resource Name field may cause confusion. Item Codes and Categories are already adjusted for in reports and other e-ISuite outputs.

3. **Item Code**

   - Resource could be ordered as one item code but fill in as another (ex: DIVS defaults, but will really be a TFLD on the incident). Using the position the resource is filling is important to the results of several Plans reports.
   - If the Item Code for a Resource included in a ROSS Import file displays as UNK, it must be changed to a valid Item Code during Check-in.

4. **Unit ID Code**

   - The Unit ID Code list is downloaded from the official national Unit ID Code list. A Unit ID Code which is not in the list cannot be entered by Check-in.

NOTE: For Enterprise: To add resources to an incident from a Resource Inventory, resources must have already been added to the Inventory. This is covered under the Resource Inventory unit for the Enterprise version. The servicing dispatch center Unit ID code in a user profile will provide access to the Resource Inventory List to add local resources to incidents.

Check-In Steps

1. From the Home page click the **Incidents** button.

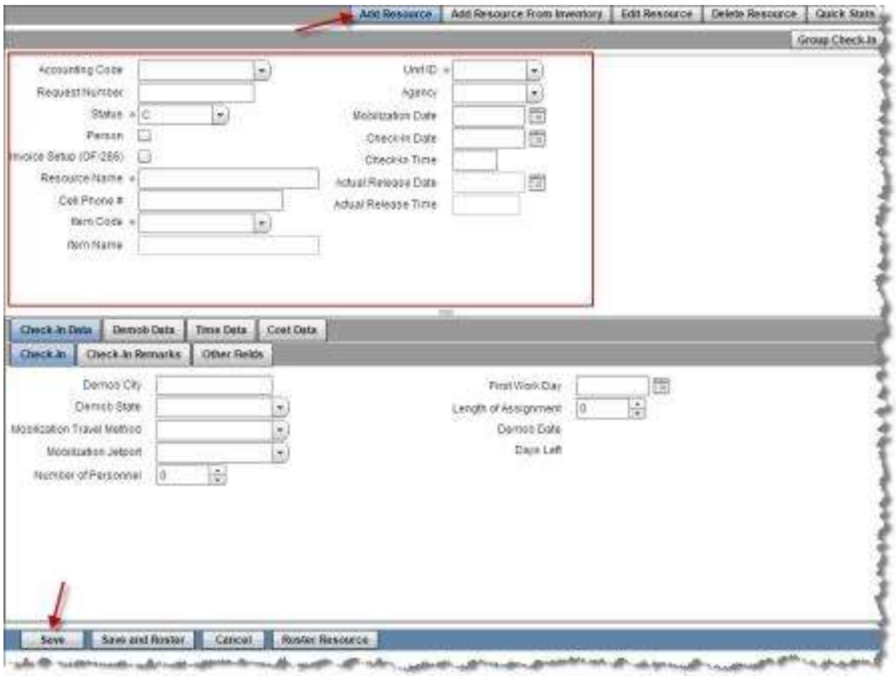
2. Select an Incident or an Incident Group from the grid.

NOTE: An Incident Group can be managed as one (altogether) by checking Manage as Group checkbox. Or uncheck the box and each incident within the group can be managed separately. To see the Incidents in an Incident Group, click the drop down arrow next to the Manage as Group checkbox.

3. Click the **Check-In** button.

NOTE: Add Resource and Edit Resource are the same screen. Clicking **Add Resource** will display a blank screen. Edit Resource shows data in the Common Data check-in fields for the resource selected in the grid.

4. Click the **Add Resource** button on the Check-In screen.



5. Select an **Accounting Code** from the drop-down list if a default code does not auto-populate the field. The system can default to a selected incident accounting code.

6. Enter a **Request #**. This is found on Resource Order or will be defaulted from ROSS Import. When initially entering Req #, "-" is not needed, the system automatically adds this. O, E, C, A, S are the only acceptable categories.

    - If a ROSS Import was performed, click on the Resource Name in the Resources Grid. All ROSS Import data will auto-fill.

    - Check ROSS data at check-in and edit as appropriate.

NOTE: The common data for the primary resource is called the "primary" record/data. Using the example of a crew, C-1 is common data to all the crew members. It is the "primary" record data. As each crew member is added with a decimal number (C1.1, C1.2, C1.3, etc.), any data specific to each of them is referred to as "subordinate" data. This is also true for crew members/drivers/operators attached to equipment such as engines, tenders, helicopters, drivers with vehicles, etc. This will be covered in more detail in Roster Resource.

7. Select a **Status** from the drop-down list. Defaults to "C" on new resource check-in and rostering new resources. The system defaults to "F" when

data is supplied thru a ROSS Import. Once the resource is confirmed to be at the incident and checking in, change the Status to "C".

- F = Filled
- C = Checked In
- P = Pending Demob
- D = Demob (to save, requires an Actual Release Date entry)
- R = Reassigned (for a resource which has been reassigned to another incident from the current incident).

8. Enter the **Resource Name**.
   - For a non-person resource, enter defining name data. Do not enter Item Code data which is in a separate field.
   - For a Person resource, check the Person checkbox. This box should be checked if a single person is checking in to the incident. Checking this box will produce Last Name and First Name fields and remove the Resource Name field.
9. For a Person Resource, click the **Trainee** checkbox if applicable.
10. For a contracted resource, check the Invoice Setup (OF286) checkbox. This flags the resource in the system as a contractor. When the box is checked, the Time Tab contains information to enter the contractor name and the rate data for that piece of equipment, or person if it is an individual. The system will generate an OF286 Invoice (contractor) instead of the OF288 invoice (non-contractor). If the user is unsure if the resource checking in is a contractor, leave the box unchecked.
11. Enter the **Cell Phone #**.
    - The 10-digit number can be typed without formatting. The system will automatically format to (xxx) xxx-xxxx.
12. Select from the **Item Code** drop-down list.
    - Defaults for resource imported from ROSS. The Item Code can be edited if it is not correct.
13. Select from the **Unit ID** drop-down list.

- The Unit ID Code list is downloaded from the official national Unit ID Code repository. A Unit ID Code which is not in the list cannot be entered. The Unit ID Code has ramifications for the Cost unit.

14. Select from the **Agency** drop-down list.

    - An incorrect Agency Code will affect several reports and will generate incorrect Cost data.

15. Enter the **Mobilization Date** or select from the calendar.

    - Enter the date the resource left their home unit for the incident.

        - If coming from another incident to this incident, use the date the resource left their home unit.

16. Enter the **Check-In Date**, select from the calendar or click + to return today's date, click - to return yesterday's date.

    - This date is critical for calculation purposes.

        - Default Check-In Date and Time or Blank options are set through Check-In Settings by users with the Check-In role.

        - Default Check-in Date and Time option will enter the current system Date and Time.

        - Blank will cause Check-in Date and Time to have to be entered for each new resource.

NOTE: The Check-In Date cannot be prior to the Incident Start Date. The system will notify the user.

17. Enter the **Check-In Time**.

    - The time a resource checks into an incident. Use current time.

18. Enter the **Actual Release Date** or select from the calendar.

19. Enter the **Actual Release Time**.

    - The information can be entered here without having to access demob screens.

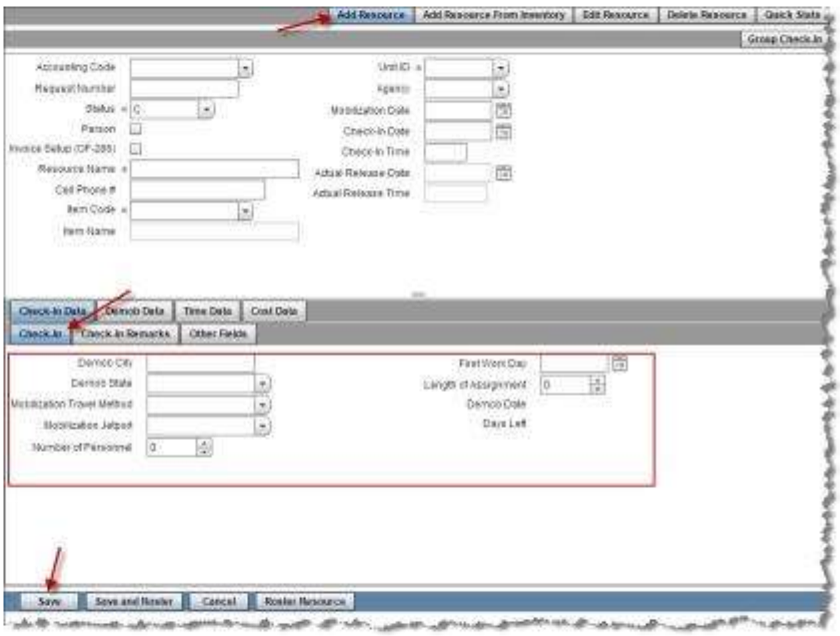
NOTE: The Actual Release Date and Actual Release Time fields will be disabled unless the resource Status is "D" or "R".

NOTE: The Actual Release Date cannot be prior to the Check-In Date. The system will notify the user.

20. Click **Save** to save the resource.

Check-In Data

1. Select the **Check-In Data** tab.
2. Select the **Check-In** sub tab.



3. Enter the **Demob City**.
    - City resource will return to when demobed from this incident.
    - May not be city from which the resource came to this incident.
4. Select the **Demob State** from the drop-down list.
    - The State to which the resource will travel when demobed from the incident. This may not be the State from which the resource came to this incident.
5. Select the **Mobilization Travel Method** from the drop-down list.

- Choose AIR if a resource flew to the incident, and did not rent a car.
- Choose A/R (air travel then rental) if a resource flew and rented a car to be returned to an airport.
  - Rental Location field will show. It is important to capture what airport the car was rented from so a return plane ticket will be made from that same airport.

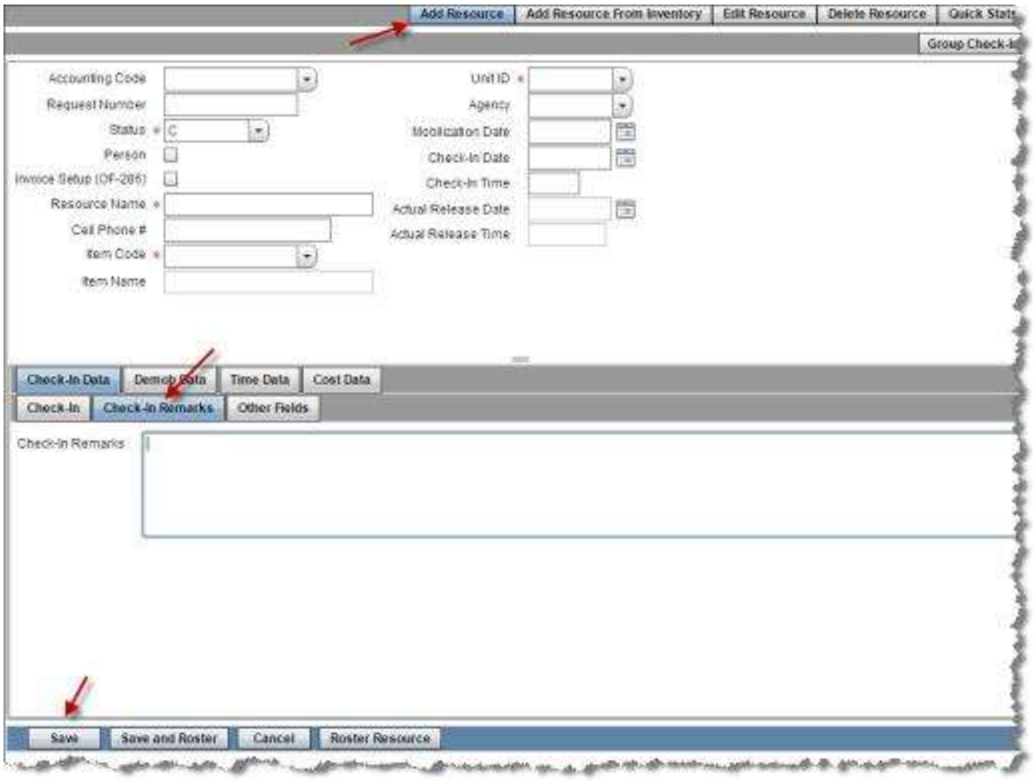
6. Select the **Mobilization Jetport** from the drop-down list.
   - Choose the airport the resource expects to fly back to when demobed from the incident. It may not be the same airport they came from to get to the incident.
   - The **Mobilization Jetport** becomes the default jetport on the **Demob Air Travel Request** form. If the demobing resource is flying to a different airport, capture the return airport designator.
   - The drop down list is fairly comprehensive. Ask the resource if they know the airport designator. If there is a question, defer to Demob.
7. Enter the **Number of Personnel** by using the up or down arrows or by entering the number in the field.
   - Enter the total number of personnel checking in under this particular resource name.
   - If a manifest is presented at check-in, verify the number of personnel who are actually present on the incident with the crew leader. The manifested personnel will be rostered to the parent resource. (See Roster Resource for instructions.)
   - If a “Person” resource box is checked, a “1” is automatically entered.
8. Enter the **First Work Day** or select it from the calendar.
   - Generally, this is considered the first day of work at an incident, not the day (travel day) they were initially mobilized.
9. Enter the **Length of Assignment** by clicking the up or down arrows.
   - If resource has been on other incidents, this number, plus the past days since the resource started Day 1, should equal 14 or 21 days or whatever length of time the resource was initially scheduled to be on assignment.
10. **Demob Date**.

- This date is automatically calculated from the First Work Day and Length of Assignment.
- First work day + Length of Assignment = Demob date.

11. **Days Left**.
    - This is an automatic calculation of the First Work Day, Length of Assignment and the resulting Demob Date. Length of Assignment - days worked = days left.
    - To edit days left, add or subtract days from the Length of Assignment field.
12. Click **Save** to save the Resource. (See Roster Resources if there is a need to roster resources to this record.)

Check-In Remarks

1. Select the **Check-In Data** tab.
2. Select the **Check-In Remarks** sub tab.
    - This is a freeform box to enter any additional pertinent information about this resource. EX: Name and Req# of resource they traveled to the incident with if a passenger - association of crew bus name and Req# with a crew name and Req#, vehicle information, etc.

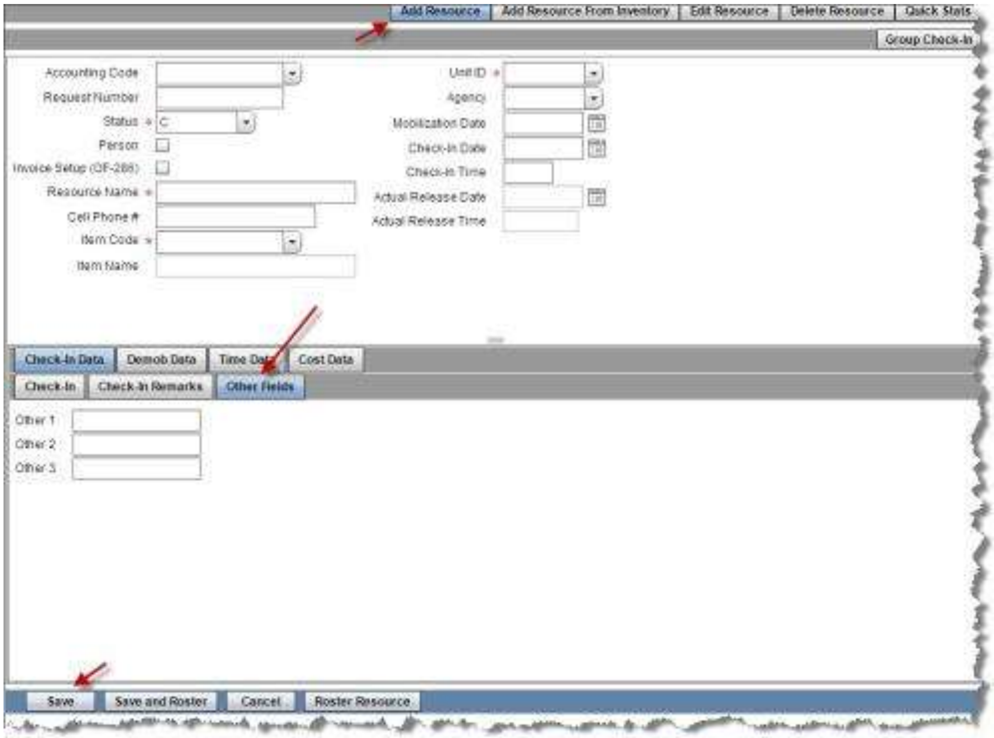


3. Click the **Save** button.

Other Fields

Use the Other fields to capture any data that is needed, but the system does not currently capture.

1. Select the **Check-In Data** tab.
2. Select the **Other Fields** sub tab.
3. Enter data into the **Other** fields.

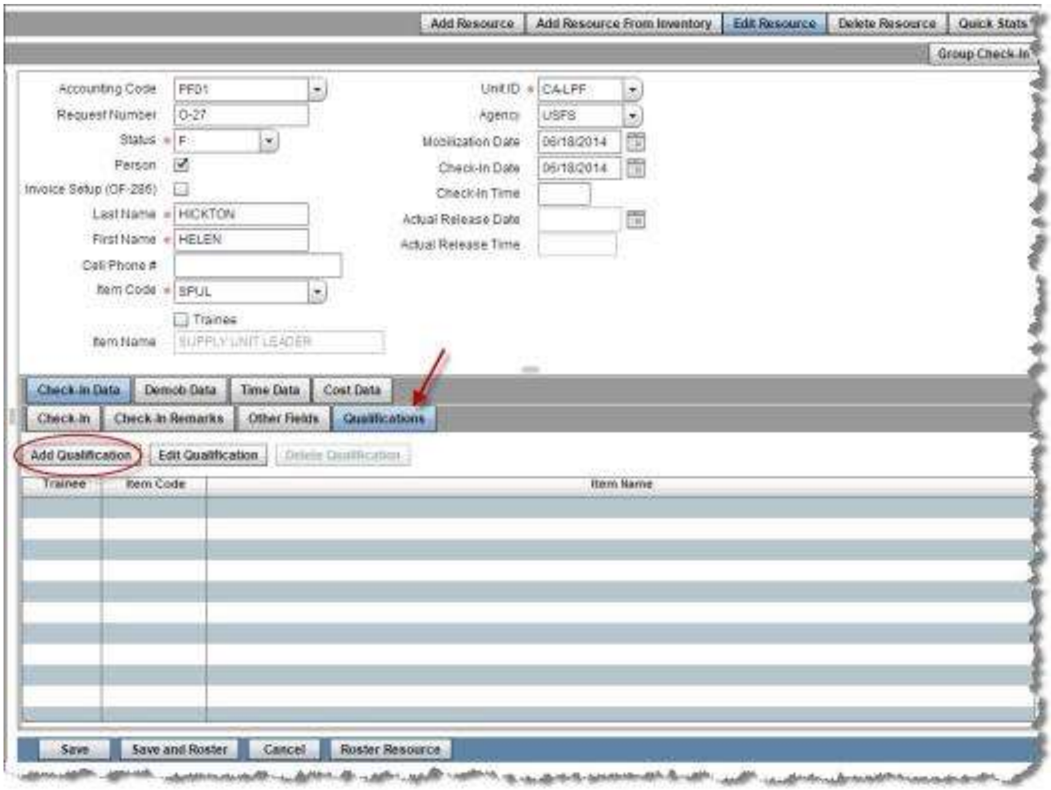


4. Click the **Save** button.

Qualifications

NOTE: This screen will only appear if the Person checkbox has been checked in the Common Data area. Qualifications should only be added if they appear on the resource's Red Card. Delete Qualification is only active if there is a qualification(s) to delete.

1. Select the **Check-In Data** tab.
2. Select the **Qualifications** sub tab.
3. Click on **Add Qualification**.



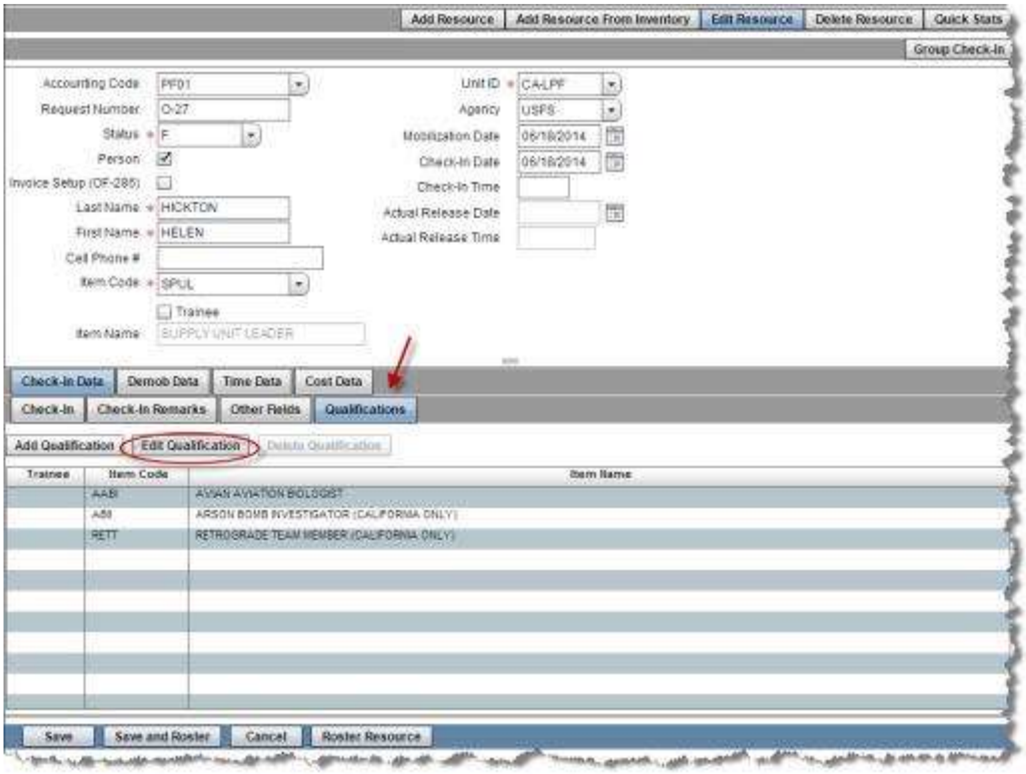
4. Choose a Qualification from the Item Code drop-down list.
5. Check the checkbox if **Trainee**.
6. Click the **Save** button.

7. Repeat steps 3-6 to add additional qualifications.

Edit a Qualification

1. Select a Qualification from the Qualifications grid to edit.
2. Click **Edit Qualification**.

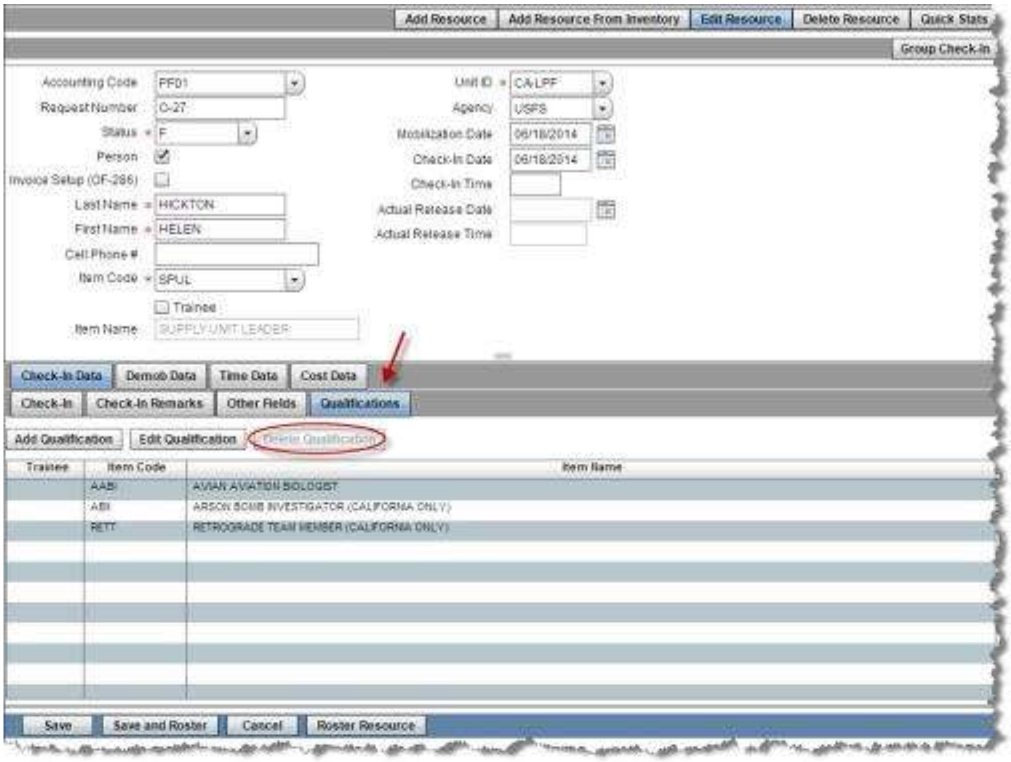
3. Make the appropriate changes to the Qualification.



4. Click the **Save** button.

Delete a Qualification

1. Select a Qualification from the Qualifications grid to delete.
2. Click the **Delete Qualification** button.



3. When the confirmation message displays, select **Yes** to delete the Qualification.

Edit a Resource

1. From the Home page click the **Incidents** button.
2. Select an Incident or an Incident Group.
3. Click the **Check-In** button.
4. Select a Resource from the resources grid to edit.
5. Click the **Edit Resource** button.

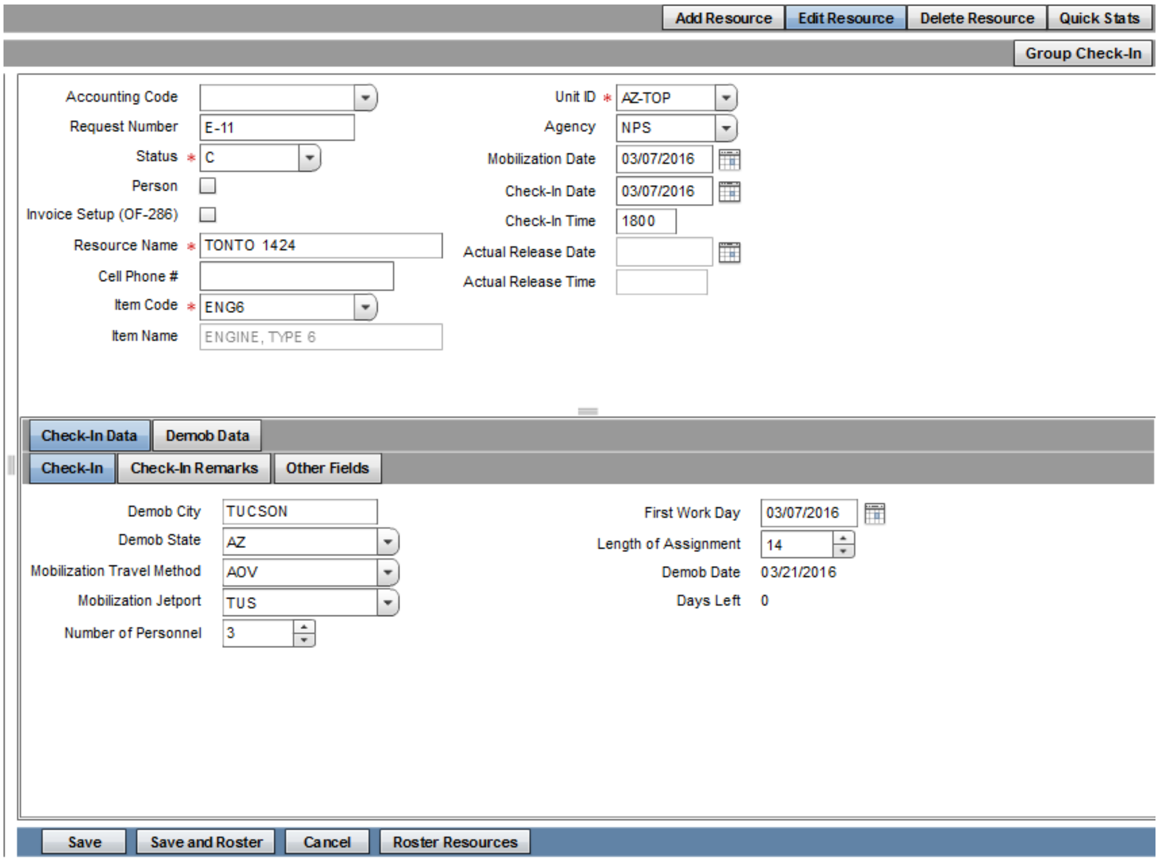
6. Make the appropriate edits. Reference Adding a Resource for more details if needed.

Editing Primary and Subordinate Resources

NOTE: See Roster Resources Propagation Popup for detailed information.

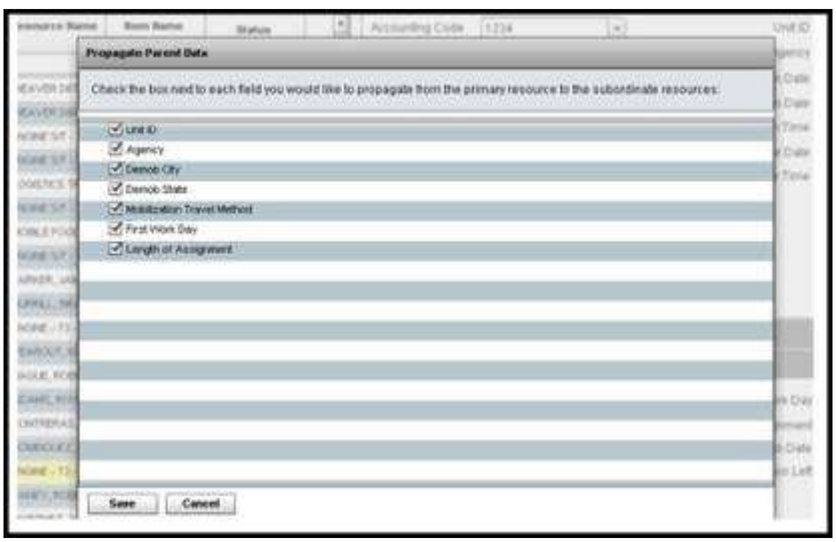
1. From the Home page click the **Incidents** button.
2. Select an Incident or an Incident Group.
3. Click the **Check-In** button.
4. Select a Primary or subordinate resource to be edited.
5. Click the **Edit Resource** button.
6. Make the appropriate edits. Reference **Adding a Resource**.

Check-In



7. Click the **Save** button.

8. When editing a primary resource a **Propagate Primary Data** pop-up window may display with checkboxes for data fields that were edited.

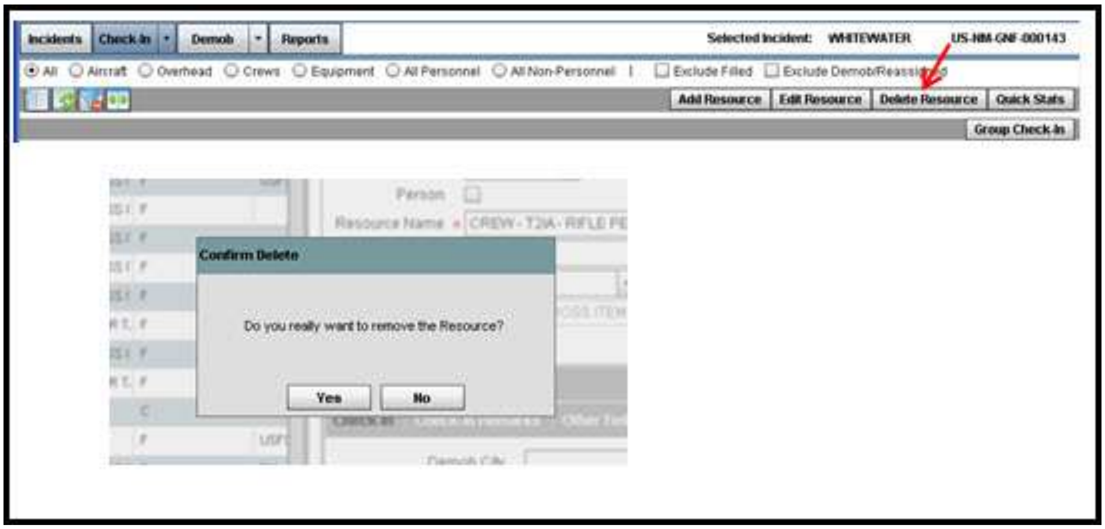


9. Check or uncheck boxes, as appropriate.

10. Click the **Save** button.

Delete a Resource

1. From the Home page click the **Incidents** button.
2. Select an Incident or an Incident Group.
3. Click the **Check-In** button.
4. Select a Resource from the resources grid to delete.
5. Click the **Delete Resource** button.



NOTE: This function will totally delete a resource from an incident. There may be associations with Time still in place which will prevent deletion. These associations must be mitigated before deletion will occur.

6. When the confirmation message displays, click **Yes** to delete the resource.

Group Check-In

Follow these steps to utilize Group Check-In within an incident in the e-ISuite System:

NOTE: With Group Check-In, the user can Check-In multiple resources using fewer steps than in Add Resources.

Advantages to Group Check-In:

- Only resources selected from the Resources Grid will show in the Group Check-In pop-up box.
- Status will automatically be changed from “F” (filled) to “C” (checked-in) as resources are selected in the pop-up grid.
- When checking in a Primary Resource with a roster, if any subordinate data fields are blank, the Primary Resource data for those fields will propagate to the subordinate record(s).
- If a subordinate record requires different data than the Primary, add/edit the fields with the correct data in the subordinate record when that record shows in the pop-up screen, then Save the record. The subordinate record will retain its unique data.

NOTE: All resources the user wishes to check in as a group, including subordinate records must be highlighted in the Resources Grid before clicking Group Check-In. Only highlighted resources show in the pop-up box.

1. From the Home page click the **Incidents** button.
2. Select an Incident or an Incident Group.
3. Click the **Check-In** button.
4. In the Resource grid utilize the Group Check-In option by selecting resources.

NOTE: For faster look-up, utilize the radio button filters located below the main menu, or utilize the filters at the top of the column headings. To select multiple resources hold down the CTRL key while making selections.

5. Click the **Group Check-In** button.

6. The Group Check-In window opens with the first selected Resource. The system automatically changes the status to "C", Checked In.

NOTE: If an Incident Group is selected and Manage as Group is not checked, the user must select an Incident for the Resource from the Select Incident drop-down box.

7. The remainder of the steps are the same as for Add Resource. (See the *Add Resource* section).

8. After entering data for a selected resource, click **Save/Next**. The next resource will display for editing.

Roster Resources

General Points

Roster Resource is the same screen process for Check-In, Time and Cost users. Entry into the rostering process has differently labeled buttons for these functions. Check-In has a Roster Resources and Save and Roster buttons. Time and Cost have a Roster button. These buttons are found at the bottom of the respective Add Resource screen. The Roster Resources and Propagation screens are exactly the same for these functions.

Categories of records which may have rosters attached are: handcrews, engine crews, helicopter crews, drivers of vehicles and operators of equipment. Drivers and equipment operators should be rostered to their equipment, not the reverse.

Common Data

Common data for the primary and subordinate resource record appears in the Roster New Resource function. Any data specific to each of the crew members, different than primary record data, should be entered for each crew member. Otherwise, only primary record data will appear in the rostered crew members' records.

The Common Data screen provides access to roster new or existing resources to a primary resource. The data fields are exactly the same as for the Add Resource function.

- Check-in uses the Roster Resource button to roster resources. All Check-in and Demob menu tabs are accessible for additions/edits.
- Time/Cost uses the Roster button to roster resources. Only the Common Data fields are accessible for additions/edits.

Common data for primary and subordinate resources can also be added/edited in the Roster Resources screen through the left grid. Click on the resource, either primary or subordinate and enter any edits. Be sure to Save the edits.

Advantages of Rostering

- Request Number will pre-fill plus a decimal point. Decimal number has to be added. Adding in sequence is recommended. As records are saved, they will appear in the pop-up box grid, allowing for double checking which number is next. (Ex: C-1.2, C-1.3)
- Status will show as "C" for each new resource rostered.
- All appropriate primary record data will be auto-filled if there is no specific data entered for an individually rostered resource.
- Data fields not auto filled should be completed. If there is any data in the subordinate record which differs from the primary resource data add/edit the individual resource's specific data.
- When Person box is checked Leader Type, Last Name and First Name fields are accessible.
- Number of Personnel Field defaults to "1" if Person box is checked.
- Check-in and Time/Cost functions can:
    - Roster a New Resource
    - Roster Existing Incident Resources
    - Roster from Resource Inventory (Enterprise version)

NOTE: As the Resources are rostered to the Primary Resource, they will display in a hierarchical manner under the Primary Resource in the grid on the left side of the window.

Strike Team/Task Force

If a Strike Team/Task Force is created at the incident, rosters can be built using the Add Existing Incident Resource function. Create a new primary Strike Team/Task Force record. Roster each crew/engine to the new primary Strike Team/Task Force record. ROSS imports may already show resources appropriately rostered. Rostering resources to a Strike Team/Task Force results in two roster actions:

1. Rostering each crew member to their crew/engine.
2. Rostering each crew/engine to the primary Strike Team/Task Force record.

In the Enterprise version, the Roster from Resource Inventory function allows adding locally inventoried resources to incident rosters.

NOTE: Propagation within a Strike Team configuration:
* Only primary Strike Team Check-in Date/Time will propagate to subordinate records.
* "Propagate Primary Data" pop-up box will only display checkboxes for Check-In Date and Time.
* A single engine in a Strike Team of engines, will propagate edits of its engine data to personnel rostered to that engine. Those data fields are listed under Propagation Rules below. .

Roster Resources Propagation Popup

The Propagation popup screen confirms with the user what data will be propagated to a subordinate record(s). Whether primary resources are selected in the main Resource grid or from the Roster Resources/Roster screen, if specific data fields are edited, the propagation popup will appear noting which fields will propagate to the subordinate records when the screen is Saved. <u>This only occurs if current data is being edited or deleted, not if the data is being entered for the first time</u>.

Rules for Propagation:

- Status:
    - Whenever Status is edited for a Primary Resource, the new Status will update all subordinates if the subordinate status is NOT "D" or "R". A "D" (demob) or "R" (reassigned) status at the subordinate level can never be changed by editing the status of the Primary Resource. Status is NOT a field included in the propagation popup screen.
- Null Field and Deletion:
    - For purposes of propagation in the <u>primary record</u>, a field is considered "null" if it has never had any data entered. Once data has been entered into a field, or even deleted, it is no longer treated as a null field. When any data is entered into a "null" field (field never having data entered), that data change does not show on the propagation popup screen.
- Once a data field has been edited, the propagation popup screen will show that field(s).

- If data is deleted from a field, that field will not show in the propagation popup screen until new data is entered.

- Propagation Popup Screen Fields:

  - If any of these fields are EDITED in the primary record, the popup screen will show. One or more checkboxes will be listed with the instruction: Check the box next to each field to propagate from the primary resource to the subordinate resources.

  - The default is the box(s) are checked. Uncheck any fields which are not to be propagated, then Save.

    - Unit ID
    - Agency
    - Check-In Date
    - Check-In Time
    - Demob City
    - Demob State
    - Mobilization Travel Method
    - Jetport
    - First Work Day
    - Length of Assignment
    - Tentative Release Date
    - Tentative Release Time
    - Estimated Arrival Date
    - Estimated Arrival Time
    - Actual Release Date
    - Actual Release Time

<u>REMINDER</u> NOTE: All fields with edited data will show as checkboxes in the Propagate Primary Data pop-up. Check or uncheck appropriate boxes for data to be propagated. If there is already specific data in a subordinate record, that data will remain and not be overwritten by the primary resource data. If there was no data in a subordinate resource data fields, the primary resource data will populate those fields.

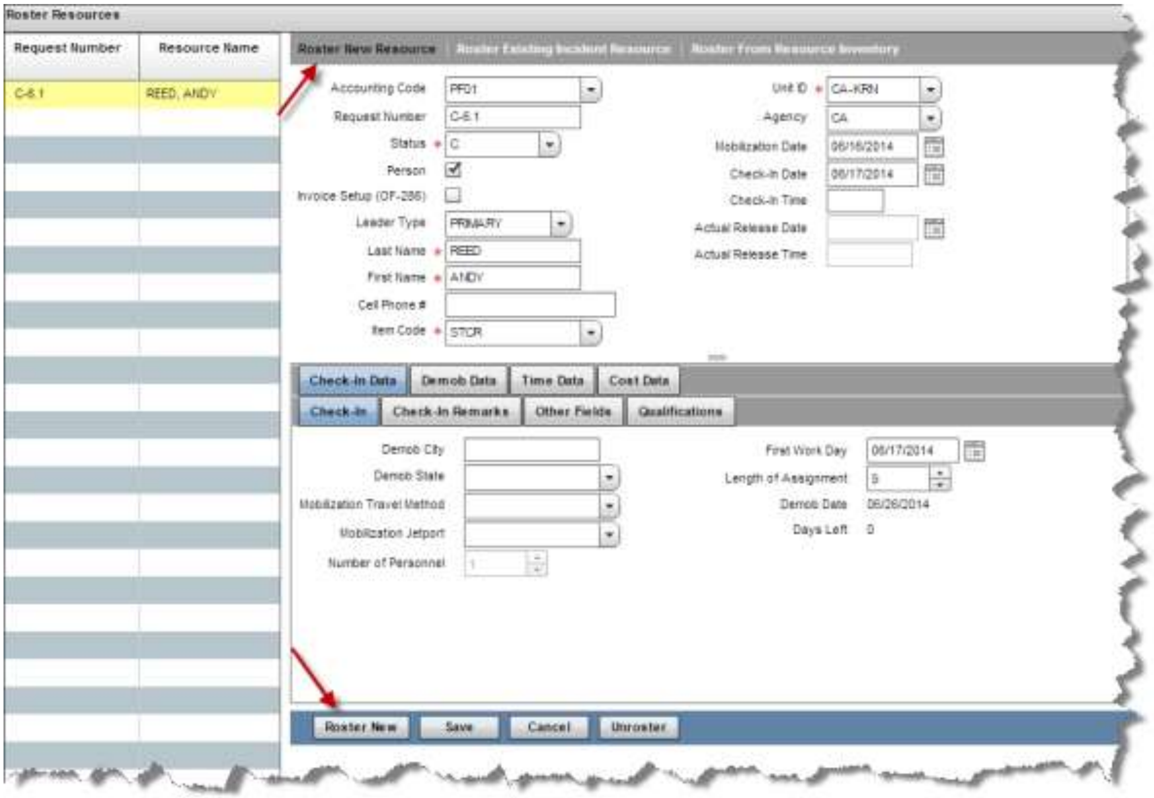
Roster a New Resource

Follow the steps in this section to Roster a New Resource in the e-ISuite system:

1. From the Home page click the **Incidents** button.
2. Select an Incident or an Incident Group.
3. Click the **Check-In** button.
4. Select an existing Resource from the Resources grid or add a new primary Resource.
5. Click the **Roster Resource** button (or **Roster** for Time/Cost roles).

6. Add resources to be rostered with their individual data variations:
    - Add new resources to the roster by clicking **Roster New**.
    - When the Person box is checked, the Leader Type field is active. The available choices in the Leader Type drop-down include: None, Primary, Secondary.
        - It is important to enter the leader name because it is a critical field for the IAP ICS 204 form. Once the Leader Type has been identified for a crew, the user can skip this field or select NONE when adding regular crew members.
    - When rostering person resources, the Person check box must be checked each time to activate Last Name, First Name fields.
    - Under **Qualifications** enter trainee position(s) for crew members.
    - **Mobilization Date** is not primary record data. It must be entered for each subordinate resource.
    - If the record is saved without adding the decimal number, click on the record in the Roster Resource grid to open it and add the decimal number. Save the changes.

- **Unroster** a resource from the roster: Highlight the resource in the grid on the left, then click the Unroster button. The resource will display in the incident grid as a single resource.



NOTE: If the user clicks the **Roster New** button without first clicking the Save button, the data from previous record will be lost. Click **Save** whenever a record is added/edited.

7. Click the **Save** button.

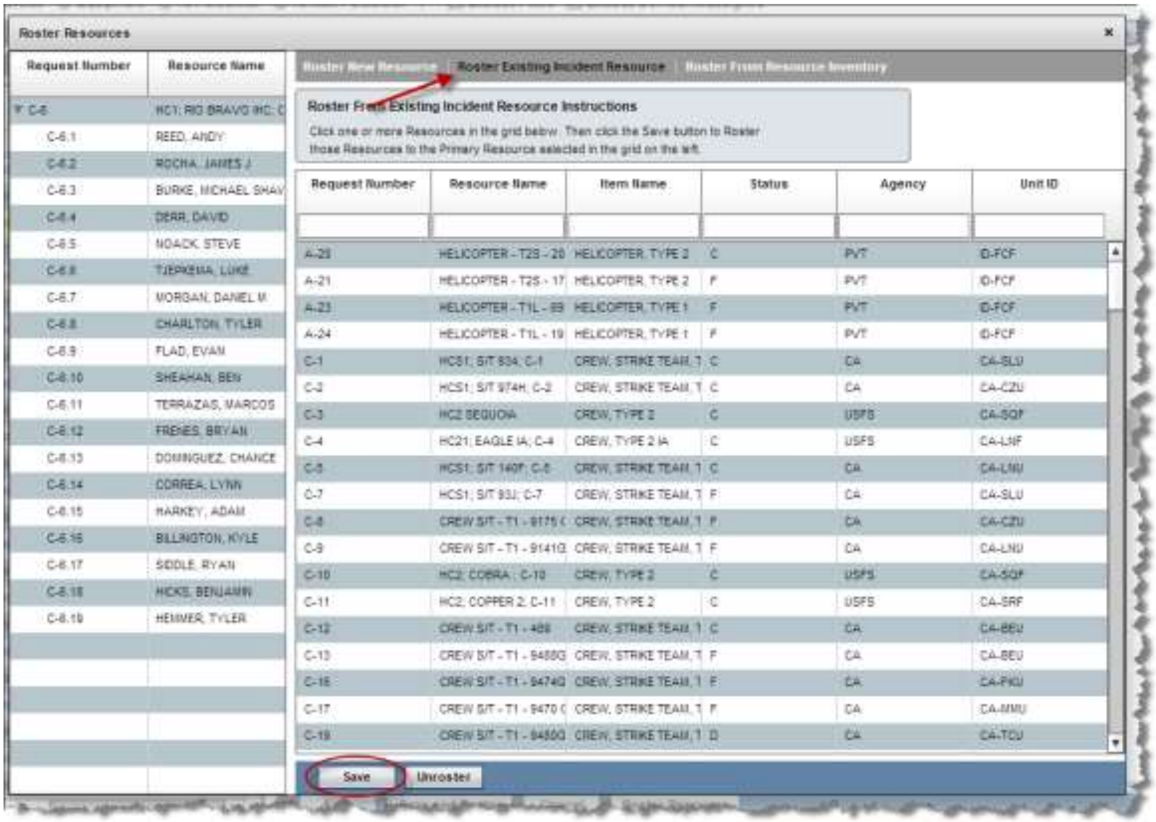
Roster Existing Incident Resources (Check-In, Time/Cost)

Existing incident resources can be added to the roster of a Primary resource on the incident. The original Request Number for newly added resources remains the same. Currently Rostered Resources appear in the resources grid on the left in the Roster Resources screen. Resources available to be rostered appear in the right grid.

Advantages:

- All primary records will show in the main resources grid for the category selected.
- All available resources that can be rostered will show in the selection grid on the right in the Roster screen. Clicking on a resource adds it to the primary record. Original Request Number remains with the rostered subordinate resource.
- This is a quick way to roster/unroster resources already on the incident to a Primary record. An unrostered Subordinate from a primary resource is returned to the main grid as a single resource.

1. Click on a Primary record from the main Resources Grid.
2. Click **Roster Resource** (in Check-in), Click **Roster** (in Time/Cost).
3. Click the **Roster Existing Incident Resources** tab.
4. Available Resources from Roster Existing Resources grid show (right grid).
5. Click on resource(s) (right grid) to be rostered to the selected primary record (left grid).
6. Click the **Save** button to roster the highlighted resource(s) to the primary resource in the left grid.
7. After closing the pop-up window, click on a newly rostered Subordinate resource to add/edit any specific data for that resource.



8. Click **Save**.

9. Subordinate record is now rostered to Primary record.

10. Click "**x**" to close the pop-up screen.

Roster Resources from Resource Inventory (Enterprise Only)

In e-ISuite Enterprise, the option is available to roster local resources from the Resource Inventory.

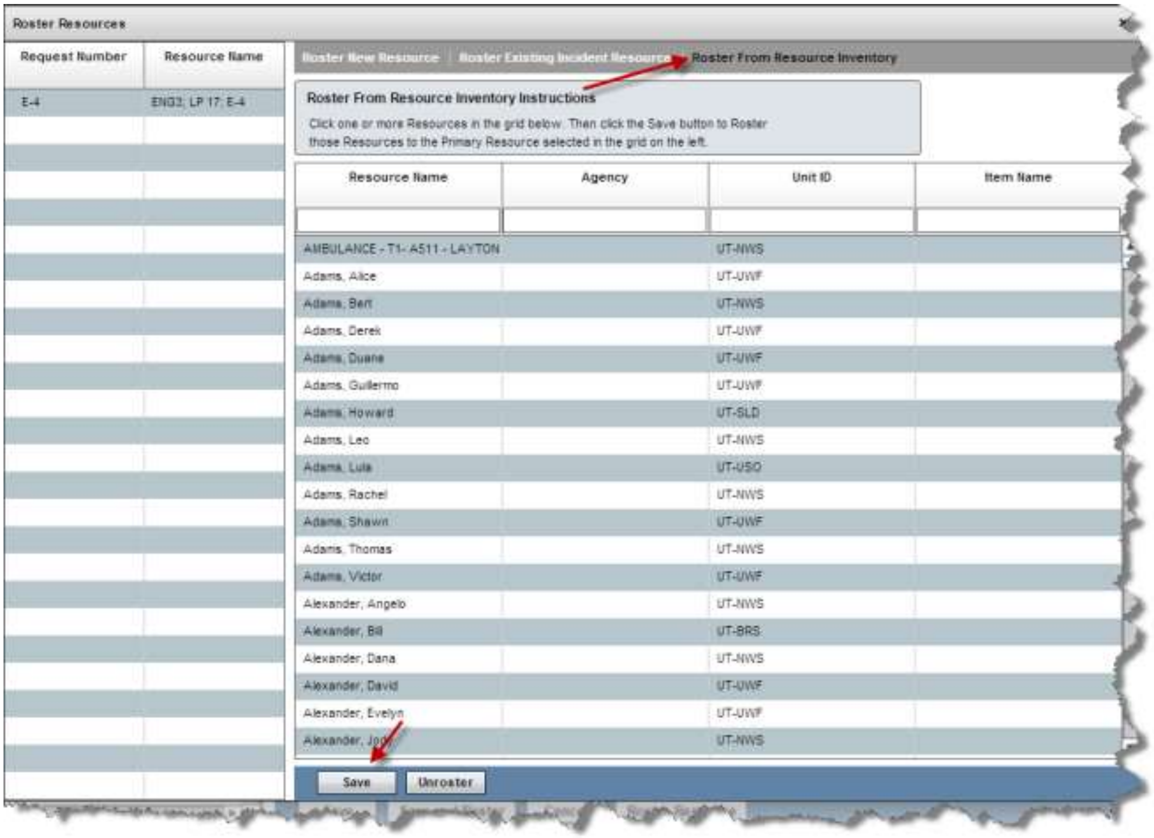
Advantages:

- All primary records will show in the main resources grid for the category selected.
- All available resources that can be rostered will show in the selection grid on the right in the Roster screen. Clicking on a resource adds it to the incident and rosters it to the primary record at the same time.
- This is a quick way to roster local resources in the Resource Inventory that were not already added to the incident.

1. Click on a Primary record from the main Resources grid.
2. Click **Roster Resource** (in Check-in). Click **Roster** (in Time/Cost).

3. Click the **Roster From Resource Inventory** tab.

4. Click one or more resources (right grid) to roster to the selected primary resource (left grid).
5. Click the **Save** button to roster the highlighted resource(s) to the primary resource in the left grid.



6. When the resources have been saved, the grid on the left now displays a list of the resources rostered to the primary resource. The right side of the screen changes to allow common data to be added to the resource highlighted on the left side grid.

7. Edit the **Request Number** and add the decimal number to it (e.g., C-1 could be changed to C-1.1).

8. Select an **Item Code** for the resource and identify whether the resource is a **Trainee** for that position.

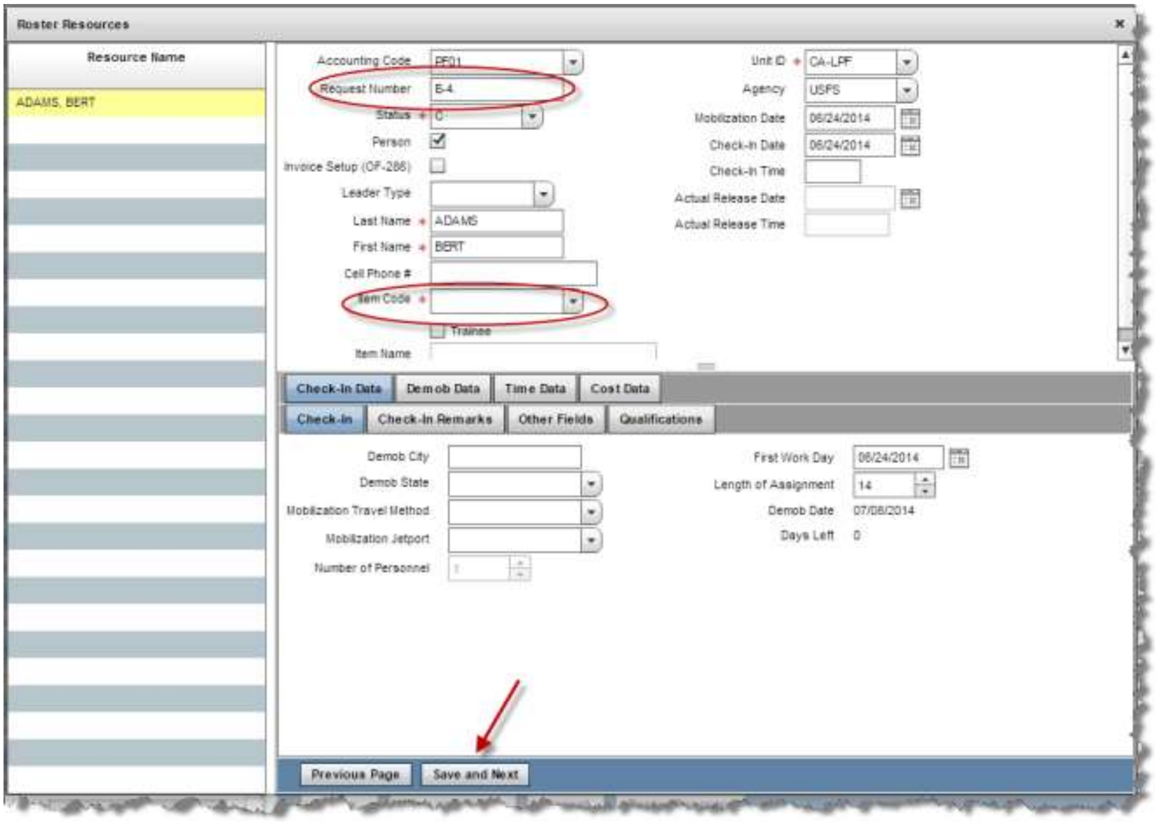
9. Enter or change any other needed data (i.e., Check-In Date, Check-In Time, etc.)

10. Click the **Save and Next** button to save the data to the highlighted resource and edit the next subordinate resource in the list on the left side of the screen.

11. Repeat steps 7-10 for each resource being rostered.

12. When the user clicks the **Save and Next** button on the last resource, the system returns to the Roster Resources pop-up.

13. Click the "**x**" in the upper-left hand side of the screen to close the pop-up.


Roster Resources
Resource Name
ADAMS, BERT
Accounting Code
PF01
Request Number
B-4
Status
C
Person
Invoice Setup (OF-286)
Leader Type
Last Name
ADAMS
First Name
BERT
Cell Phone #
Item Code
Trainee
Item Name
Unit ID
CA-LPF
Agency
USFS
Mobilization Date
06/24/2014
Check-In Date
06/24/2014
Check-In Time
Actual Release Date
Actual Release Time
Check-In Data
Demob Data
Time Data
Cost Data
Check-In
Check-In Remarks
Other Fields
Qualifications
Demob City
Demob State
Mobilization Travel Method
Mobilization Jetport
Number of Personnel
First Work Day
06/24/2014
Length of Assignment
14
Demob Date
07/08/2014
Days Left
0
Previous Page
Save and Next

Unroster a Resource

Follow the steps in this section to Unroster a resource in the e-ISuite system:

1. From the Home page click the **Incidents** button.
2. Select an Incident or an Incident Group.
3. Click on the **Check-In** button.
4. Select an existing Resource from the Resources grid.
5. Click **Roster Resource** (Check-in), click Roster (Time/Cost).

6. Click on the Primary resource from the Roster Resources Grid (left grid).
7. Resources from the Primary resource show (left grid).
8. Click on resource(s) (left grid) to be unrostered from the selected primary resource (left grid). (This can be done using either the Roster New Resource or Roster Existing Incident Resource screen.)
9. Click **Unroster**.
10. Unrostered resource now shows in available resource grid (right grid) if using the Roster Existing Incident Resource screen. If using Roster New Resource screen, next step is to click Save. (<u>Unrostered resource will be at bottom of the grid list, click the column header to reorder the grid list.</u>)
11. Click on Primary resource to add/edit Common Data. (NOTE: The Number of Personnel in Primary resource should be edited to reflect person change.)
12. Click **Save**.
13. Click "**x**" to close the pop-up screen.

NOTE: When a Primary resource with resources rostered to it is deleted, the system will delete the primary resource and all resources rostered to the primary resource. If either the primary resource or any rostered resources have critical data, the system will not delete either the primary resource or the subordinate resources. Critical data is defined as data that is part of the financial or historical record. (e.g., Time Postings, Invoices, etc.)

NOTE: When a user changes the Status or adds an Actual Release Date for a primary Resource, the system propagates that change to all subordinate Resources, regardless of the level at which they are rostered. For example, if there are five Engines rostered to a Strike Team primary Resource the system would propagate the Status change or Actual Release Date to all five Engines and their rostered crew members. Resources already with Status of "D" will not be changed.

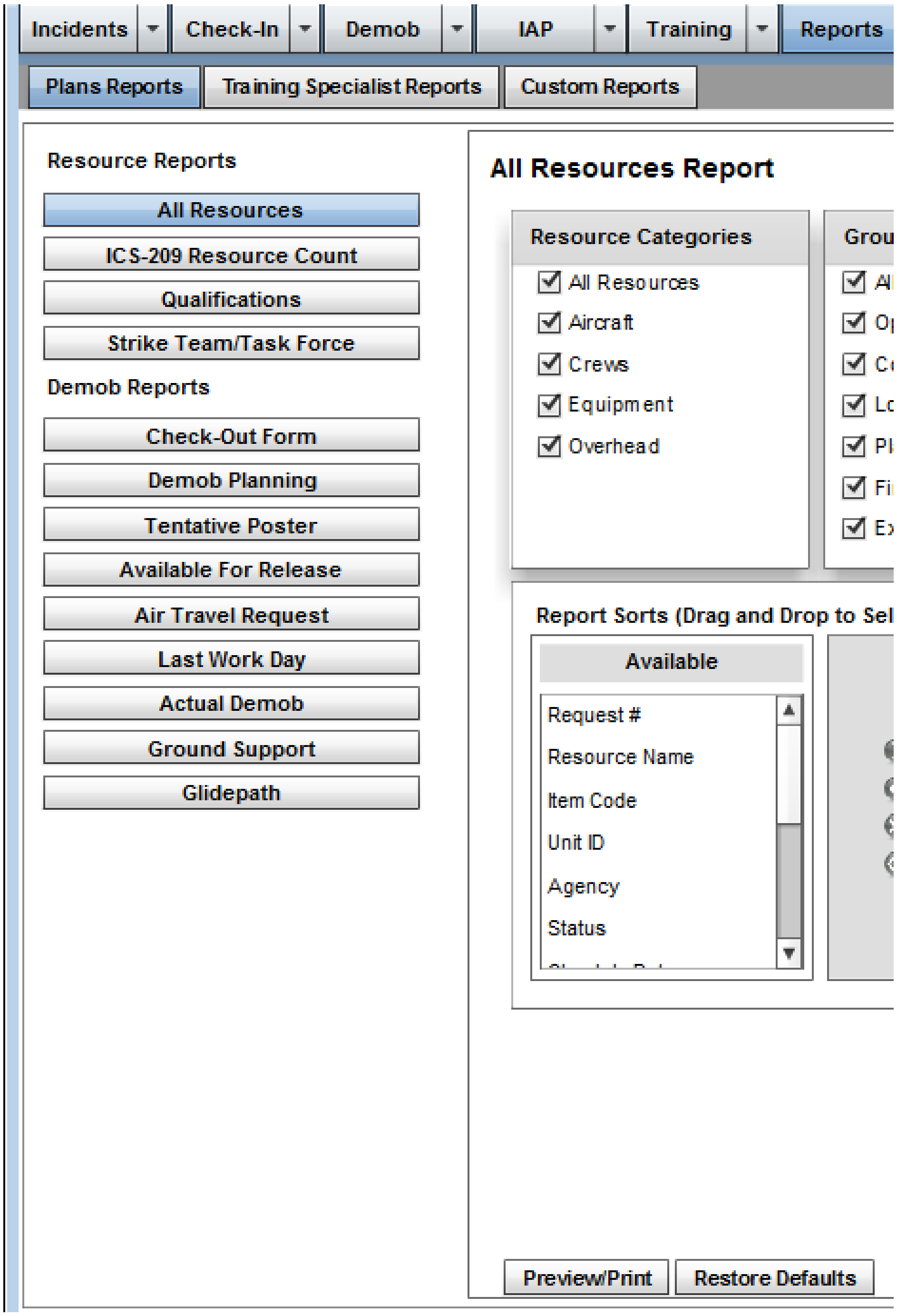
Printing Plans Reports

Follow the steps in this section to print Plans Reports for Resources in the e-ISuite system:

NOTE: General Report Characteristics--
• All Reports can be Previewed and Printed. Previewing every report before printing will ensure that the report is returning the information desired. Readjust the sorts and filters, then preview, until the desired data is returned in the report.
• Some reports have buttons to Restore Default settings. This will reset the filter and sort areas back to default status.
• Most reports have checkboxes, Drag and Drop or shuttle arrows which move data field selections back and forth. Highlight an item and drag it from Available and drop in Selected or use the arrows.
• Every report has an instruction screen which can show or be hidden. Specific requirements for reports/forms are noted in these instructions.
• Use as few as possible sort criteria to return better results. Otherwise the criteria may be so limiting that the results are not useful or cannot be returned.
• Printing Demob reports/forms can be forced by clicking the checkbox for Resource Selected in the Grid from the Demob screen.

1. From the Home page click the **Incidents** button.
2. Select an **Incident** or **Incident Group**.
3. Click **Reports** on the main toolbar.
4. Select **Plans** from the sub-menu.
5. Select one of the following options to generate the identified report:

- All Resources Report (see All Resources Report)
- ICS209 Resource List (see ICS209 Resource List)
- Qualifications Report (See Qualifications Report)
- Strike Team/Task Force Report (See Strike Team/Task Force Report)



All Resources Report

This report prints all of the Resources that exist for the selected Incident. It contains similar information as the Demob Planning Report, however there are more check-in specific fields. This report can be filtered and sorted several ways. Use this report to confirm/add/edit resource information after check-in. The report can be given to incident managers for this purpose. Blank information can be filled in and added to resource records in preparation for demob.

NOTE: If ALL Resources is check marked, as well as all other filters, ALL Resources will take precedence. If desired return is only for a few filter choices, be sure only those filters are checked.

NOTE: This report:
* Provides the Category(s), the Section(s), and the Resource Status(s) to be included in the report.
* Provides various sorts using the shuttle box to choose how a report will be sorted. Use less rather than more sort criteria.
* Check the Strike Team/Task Force Components to include subordinate records. The report will contain only Strike Teams and Task Forces that are currently active (e.g., Status = "C" or "P").
* Includes sub-totals for the first sort selected in the shuttle box, click to check the Subtotals on First Sort checkbox. Whatever data field is first in the Selected list, will show sub-totals.
* Provides a checkbox for Group by Subsection.

1. From the Report Selection panel on the left under Resource Reports, click the **All Resources** button.

2. Under **Resource Categories**, select the Categories to include in the report. Categories can include: All Resources, Aircraft, Crews, Equipment, and Overhead.

3. Under **Group by Section**, select the sections to include in the report. Sections can include: All Sections, Operations, Command, Logistics, Plans, Finance, and External.

4. Under **Resource Status**, select the status codes to include in the report. Only Resources with the selected Status Codes will be included in the report. Status options include: All Statuses, Checked-In, Demobed, Reassigned, Pending Demob, Filled.

5. Select the sort options to include in the report from the **Report Sorts** box and click the **>** arrow to move them to the Selected box. To include all Sorts, click the **>>** button.

6. To include **Strike Team/Task Force Components** on the report, select the Strike Team/Task Force Components checkbox.

7. If one or more sorts are selected, include subtotals on the first sort by checking the **Subtotals on First Sort** checkbox. If this option is checked, the Sub-Total section will show on the report along with the name of the

item associated with the sub-total, the total number of records and the total number of personnel associated with the sub-total.

8. Click **Preview** to preview the report before printing.

9. To Restore Defaults, click the **Restore Defaults** button.

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ALL RESOURCES REPORT
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REQ #	RESOURCE NAME / LEADER NAME	ITEM CODE	UNIT ID	AGENCY	STATUS	CHECK-IN DATE	MOB DATE	FIRST WORK DAY	LNG OF ASSIGN	DEMOB DATE	TRAVEL METHOD	CELL NUMBER
AIRCRAFT RESOURCES												
OPERATIONS :												
A-20	HELICOPTER - T2S - 205HQ	HEL2	ID-FCF	PVT	C	06/15/2014	06/15/2014		0			
A-21	HELICOPTER - T2S - 17HX	HEL2	ID-FCF	PVT	F							
A-23	HELICOPTER - T1L - 699RH	HEL1	ID-FCF	PVT	F		12/17/2013					
A-24	HELICOPTER - T1L - 191CH	HEL1	ID-FCF	PVT	F		12/17/2013					
CREWS RESOURCES												
OPERATIONS :												
C-1	HCS1; S/T 934; C-1 ELMORE, PETER	HCS1	CA-SLU	CA	C	06/16/2014	06/15/2014	06/16/2014	14	06/29/2014		
C-2	HCS1; S/T 974H; C-2 COPE, TONY	HCS1	CA-CZU	CA	C	06/16/2014	06/15/2014	06/16/2014	14	06/29/2014		
C-3	HC2 SEQUOIA PRIETO, HIPSTER	HC2	CA-SQF	USFS	C	06/16/2014	06/15/2014	06/16/2014	14	06/29/2014		
C-4	HC21; EAGLE IA; C-4 EBERT, WARREN	HC2I	CA-LNF	USFS	C	06/16/2014	06/15/2014	06/16/2014	12	06/27/2014		

ICS209 Resource List

This option prints the Resources that meet the 209 requirement for the selected Incident. It contains ICS209 information for Block 29 of the FAMWEB ICS209 Report.

NOTE: This Report --
* Uses the number of persons from the Strike Team/Task Force Primary record. If the count for these resources does not appear correct, correct the Primary record Number of Personnel data field.
* If no Agency has been identified for a resource in Common Data, that resource with its personnel numbers will appear in a No Agency column. These resources should be located and edited to include an Agency, and the report rerun. The goal would be to have no resources appear in the No Agency column.* The easiest way to find "no agency" resources is to have Agency as a filter in the Resource Grid. Filter the column, resources without an agency should float to the

top of the column.
* Aircraft resources are usually not appropriately checked in. A check with Air Operations personnel can confirm the true number of each type of Helicopter.
* Definition of Totals:
--Sub Total is the total of FAMWEB ICS-209 counted resources.
--Non 209 is the total of all other types of resources which are not reported in FAMWEB.
--TOTAL is the sum of the FAMWEB Sub Total and the Non 209 total. This is really the total number of personnel on the incident for ICS-209 purposes, even though it includes personnel who are not counted in the FAMWEB report columns. This TOTAL number is important to several incident functions.
* Preview the report. If there is conflicting data, return to the Resources Grid.
--Click Check-in or Demob, locate the record(s) and resolve the issue(s). Usually the problem is with calculation of Number of Personnel or no Agency has been identified. Preview the report again. When the data is correct, print and deliver the report to the appropriate person/function.

1. From the report selection panel on the left under Resource Reports, click the **ICS209 Resource Count** button.

2. Select from either the **Display States as a Group** or **Display States Individually** radio button.

3. Click **Preview** to preview the report before printing.

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ICS-209 INFORMATION FOR BLOCK 29

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NOTE: The top number in each box identifies the number of resources for that category. The bottom number in each box identifies the number of personnel associated with that resource category.

Agency Code	CRW1	CRW1 ST	CRW2	CRW2 ST	HEL1	HEL2	HEL3	ENGS	ENGS ST	DOZR	DOZR ST	WTDR	OVHD	CAMP CREWS	SUB TOTAL	NON 209	TOTAL
No Agency	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	1
	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	1
BIA	0	0	1	0	0	0	0	0	0	0	0	0	2	0	3	0	3
	0	0	21	0	0	0	0	0	0	0	0	0	2	0	23	0	23
BLM	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	1
	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	1
CNTY	0	0	0	0	0	0	0	0	0	0	0	0	2	0	2	0	2
	0	0	0	0	0	0	0	0	0	0	0	0	2	0	2	0	2
FED	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	1
	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	1
PVT	0	0	1	0	0	1	0	0	0	0	0	0	0	0	2	0	2
	0	0	20	0	0	1	0	0	0	0	0	0	0	0	21	0	21
USFS	0	0	2	0	0	0	0	12	3	2	0	2	37	0	58	21	79
	0	0	42	0	0	0	0	48	53	4	0	4	37	0	188	21	209
STATE	1	4	0	0	0	0	0	3	1	0	0	0	54	1	64	0	64

Qualifications Report

This option prints a list of all of the Resources that are qualified for the selected Item Codes. It lists the positions/Item Codes defined in the e-ISuite database with the resources that are assigned to the positions. Other supporting data is included. Typically, from one to a couple of qualifications are requested to be queried in this report. Those few Item Codes should be the only ones in the Selected shuttle box. A Report example would be Operations looking for someone with ICT3 qualifications. Move ICT3 to the Selected box and run the report. Any resource with ICT3 listed as a qualification or listed as an additional qualification at Check-in, would show in an ICT3 report. All Item Codes can be filtered for if requested, however the report could be very lengthy. Only those Item Codes with data to return will show in a comprehensive report.

NOTE: This Report --

- Sorts alphabetically by Item Code. Within each Item Code, resources are alphabetical by last name or resource name if a crew or equipment.
- Identifies the resource with an “*” when the resource is currently assigned to that position on the incident. If a name appears under an Item Code without an *, then the resource has that as an additional qualification but is not assigned to that position on the incident. This enables a resource with a specific qualification to be located and moved from one position to another if the need arises.
- Defaults to all resources - including trainees.
- Identifies Trainees with a ‘t’ in the Trainee column.
- Will display trainee resources with the Trainee checkbox checked.
- Can be filtered to exclude trainees or to display Trainees Only.
- Will display the date for Pending or Demobed status in the Tentative (T) / Demob (D) Date column with a (T) or (D) following the date.
- Will show all Item Codes with data by default if no Item Codes are moved to the Selected box.

1. From the report selection panel on the left under Resource Reports, click the **Qualifications** button.

2. Select the Item Codes from the Available box on the left and click the **>** arrow to move them to the Selected box. To include all Item Codes, click the **>>** arrow.

NOTE: Item Codes can also be moved from the Available to the Selected box by dragging and dropping it in the Selected box.

3. To include all resources, click the **All Resources** radio button.
4. To exclude trainees, click the **Qualified Only** radio button.
5. To include only trainees, click the **Trainees Only** radio button.
6. Click **Preview** to preview the report before printing.
7. To restore defaults, click the **Restore Defaults** button.

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Request Number	Name	Trainee	Agency	Item Code	Section	Tentative (T) Demob (D) Date
ADVANCED EMERGENCY MEDICAL TECHNICIAN						
O-42	* FORBES, JUDY T		CA	EMTA	LOGISTICS	06/30/201 (D)
AGENCY REPRESENTATIVE (AREP)						
O-1	* CARREIRO, DENNIS	T	CA	AREP	COMMAND	06/27/201 (D)
O-144	* HUMPHREY, GARY		CA	AREP	COMMAND	
O-57	* HUTCHINSON, RICK		CA	AREP	COMMAND	
O-47	* KING, DENNIS	T	CA	AREP	COMMAND	06/28/201 (D)
O-143	* SALVATE, JOHN		CA	AREP	COMMAND	
O-160	* STEVE PATE	T	CA	AREP	COMMAND	
AIR OPERATIONS BRANCH DIRECTOR (AOBD)						
O-56.31	* CROTTY, JOHN R		CA	AOBD	OPERATIONS	
O-167	* MASOVERO, ANTHONY JOSEPH		USFS	AOBD	OPERATIONS	11/05/201 (D)
AIR SUPPORT GROUP SUPERVISOR (ASGS)						
O-56.32	* IMT - DRIESBACH, AL G		BIA	ASGS	OPERATIONS	
O-56.33	* WARNER, CURTIS K	T	USFS	ASGS	OPERATIONS	
AIR TACTICAL GROUP SUPERVISOR (ATGS)						
O-38	* BASCH, PATRICK L		USFS	ATGS	OPERATIONS	06/29/201 (D)
O-163	* MCGUIRE, DANIEL		USFS	ATGS	OPERATIONS	07/02/201 (D)
AMBULANCE (AMBU)						

Strike Team/Task Force Report

This option prints a list of all Strike Team or Task Force Resources for the selected Incident. It identifies the members of Strike Teams and Task Forces. Only Strike Teams and Task Forces that are currently active (e.g., Status “C” or “P”) at the selected incident will be included in this report.

1. From the report selection panel on the left under Resource Reports, click the **Strike Team/Task Force** button.
2. Select one or more Strike Teams/Task Forces to include on the report.
3. To select all of the Strike Teams/Task Forces, click the **Select All** button.
4. To deselect all of the Strike Teams/Task Forces, click the **Deselect All** button.
5. To refresh the grid, click the **Refresh Grid** button.
6. Click **Preview** to preview the report before printing.

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REQ #	NAME	ITEM NAME	STATUS	# OF PERSONNEL	AGENCY	UNIT ID	TRAVEL METHOD	LAST WORK DAY	TENTATIVE RELEASE DATE	ACTUAL RELEASE DATE
C-1	**HCS1; S/T 934; C-1**	CREW, STRIKE TEAM,	C	43	CA	CA-SLU		06/29/2014		
C-1.1	ELMORE, JEFF	STRIKE TEAM LEADER,	C	1	CA	CA-SLU		06/29/2014		
C-1.2	HC1; CASTA 17; C-1.2	CREW, TYPE 1	C	21	CA	CA-SLU		06/29/2014		
C-1.2.1	WATT, MICHAEL	CREW BOSS	C	1	CA	CA-SLU		06/29/2014		
C-1.3	HC1; CASTA 15; C-1.3	CREW, TYPE 1	C	21	CA	CA-BDF		06/29/2014		
C-1.3.1	RAMLER, BRANDON	CREW BOSS	C	1	CA	CA-BDF		06/29/2014		
C-2	**HCS1; S/T 974H; C-2**	CREW, STRIKE TEAM,	C	41	CA	CA-CZU		06/29/2014		
C-2.1	HC1; MOND 19; C-2.1	CREW, TYPE 1	C	20	CA	CA-CZU		06/25/2014		
C-2.1.1	ROOKUS, JENNIFER	CREW BOSS	C	1	CA	CA-CZU		06/25/2014		
C-2.2	HC1; RAM 16; C-2.2	CREW, TYPE 1	C	20	CA	CA-DAG		06/25/2014		
C-2.2.1	GARCIA, TREY	CREW BOSS	C	1	CA	CA-DAG		06/25/2014		
C-2.3	COPE, ANDREW R	STRIKE TEAM LEADER,	C	1	CA	CA-DAG		06/25/2014		
C-5	**HCS1; S/T 140F; C-5**	CREW, STRIKE TEAM,	C	43	CA	CA-LNU		06/25/2014		
C-5.1	LAYTON, JOHN	STRIKE TEAM LEADER,	C	1	CA	CA-LOM		06/25/2014		
C-5.2	HC1; DELTA 35; C-5.2	CREW, TYPE 1	C	21	CA	CA-LNU		06/25/2014		
C-5.2.1	CLARK, CORY	CREW BOSS	C	1	CA	CA-LNU		06/25/2014		
C-5.3	HC1; DELTA 10; C5.3	CREW, TYPE 1	C	21	CA	CA-LNU		06/25/2014		
C-5.3.1	PRITCHARD, PATRICK	CREW BOSS	C	1	CA	CA-LNU		06/25/2014		
C-7	**HCS1; S/T 93J; C-7**	CREW, STRIKE TEAM,	F	1	CA	CA-SLU		06/27/2014		
C-7.1	HERRING, NATE	CREW BOSS	F	1	CA	CA-SLU		06/27/2014		
C-7.2	HC1; CASTA 222; C-7.2	CREW, TYPE 1	F	1	CA	CA-SLU		06/27/2014		
C-7.2.1	STERRETT, DON	CREW BOSS	F	1	CA	CA-SLU		06/27/2014		
C-7.3	HC1; CASTA 6; C-7.3	CREW, TYPE 1	F	21	CA	CA-SLU		06/27/2014		
C-7.3.1	POTTS, JASON	CREW BOSS	F	1	CA	CA-SLU		06/27/2014		
C-8	**CREW S/T - T1 - 9175 G**	CREW, STRIKE TEAM,	F	1	CA	CA-CZU				
C-8.1	CREW - T1 - BEN LOMOND 4	CREW, TYPE 1	F	1	CA	CA-CZU				

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