



UNIT 1

I-Suite Introduction

01/28/2010

This Training Manual is for use with the 9.01.00 version of the I-Suite System.

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Changes in Training Manual

The following changes were made to the Introduction Training Manual for the 9.01.00 release:

NOTE: Underlined sections identify text that was changed within existing paragraphs.

Security

- Cannot be one of the last 24 passwords defined for your account. (See page 4)
- If you fail to login with a correct password 5 consecutive times, your user account will be locked. (See page 4)

STUDENT MANUAL

COURSE	I-Suite
UNIT	1.0 – Course Overview.
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify course organization and topics.

I. INTRODUCTION

NOTE: The Introduction Unit is not "hands on." The information for this section is explained in a Power Point presentation.

A. Transportation.

1. Who needs rides to lunch, hotel, etc.?
2. Facilities: Restrooms, drink and snack locations, emergency exits.
3. Lunch and break schedule.
4. Telephones and where emergency messages can be left.

B. Time Frames.

1. There is a lot to cover.
2. Class will start at the time specified.

C. Unit Topics.

1. The following topics are covered in this training manual:
 - a. 1.0 – Course Overview
 - b. 1.1 - Security for I-Suite
 - c. 1.2 – Getting Started with I-Suite
 - d. 1.3 – Common Features
 - e. 1.4 – I-Suite Options
 - f. 1.5 – Working with grids and tables
 - g. 1.6– I-Suite Modules

D. Course Overview.

2. The training manual is divided into separate units corresponding to the modules.
3. Handouts are located at the end of each unit.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	1.1 - Security for I-Suite
OBJECTIVES	<p>Upon completion of this unit, the trainee will be able to:</p> <ol style="list-style-type: none">1. Learn the Rules of Behavior to which you must adhere.2. Identify the key I-Suite security principles.3. Understand that I-Suite may contain PII Data and how that data is protected.4. Understand I-Suite user accounts.

I. RULES OF BEHAVIOR

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

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

- B. It is everyone's responsibility to safeguard the information that is collected, stored and maintained by the I-Suite application.
- C. The Rules of Behavior do not replace but enhance existing agency policies.
- D. 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 I-Suite application to which they do not have authorization. User accounts and additional roles can be granted by a user with a DB Admin role, which is usually the incident Computer Technical Specialist (CTSP).
- E. Security violations include, but are not limited to:
 - 1. Sharing of user name and password pairs.
 - 2. Sharing I-Suite information or data with individuals who do not have an official need to know.
 - 3. Violating any other security policy or procedure.
- F. If you leave your computer for any period of time, close the I-Suite application. This will ensure that no unauthorized person can access the I-Suite application while you are away.

II. I-SUITE SECURITY PRINCIPLES

- A. A user must have an active user account in an I-Suite database in order to log into the I-Suite application and access that database. The only exception to this rule is during the initial setup procedure when an initial DB Admin account is created.
- B. Only a user with a DB Admin role can create User Accounts. In most cases, this is the incident CTSP at the Incident.
- C. Each user must be assigned a unique user name and password to log into a database within the I-Suite application.
- D. A user cannot use the same user account to log into the same database at the same time, unless they have a DB Admin role.
- E. Backing up the I-Suite database is crucial and should be done on a regular basis. The I-Suite application includes an automatic backup feature that allows the CTSP to backup the database as often as needed. For more information on backups, refer to the *I-Suite Database Admin Training Manual*.
- F. I-Suite databases should NOT be distributed to anyone except those outlined in other policies (e.g. to transitioning team, owning unit, or authorized personnel).

- G. Before logging into I-Suite you must read and agree to the security statement that displays.
- H. Only authorized personnel can attach a repository database file. The repository database file does not use the same password as the database used to create it.
- I. You must have a DMS User Name and DMS Password to upload the repository and other export files on the I-Suite Web site (<http://isuite.nwcg.gov>).
- J. You must enter the database password to perform the following processes:
 - Attach a database
 - Detach a database
 - Restore a database from a backup
 - Copy a database
 - Rename a database
 - Merge databases
- K. When you create a new database, you MUST provide a password for the database. The requirements for the database password are:
 1. Must contain a minimum of 12 characters.
 2. Must contain at least 1 lowercase letter.
 3. Must contain at least 1 uppercase letter.
 4. Must contain at least 1 number.
 5. Must contain at least one of the following special characters:

!#%&*^
 6. Cannot be a dictionary word.

III. PII Data

- A. PII data is Personally Identifiable Information.
- B. The I-Suite 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.
- C. The I-Suite database may contain PII data, such as Social Security Numbers (SSN), Tax Identification Numbers(TIN), address and phone information.
- D. The SSN and TIN are encrypted in the database and are never visible to the user in I-Suite. Data entry is masked with asterisks and must be entered twice for verification.
- E. All data export files are encrypted for security purposes to protect PII and other sensitive data.

III. Understand I-Suite User Accounts

- A. I-Suite user accounts consist of a unique user name and password set. They are specific to each database and the same account may be used in multiple databases.
- B. A user name must be 1 to 20 characters in length and cannot be "admin." The user name usually consists of the first letter of the user's first name and their last name (e.g. John Doe is jdoe).
- C. User names must be unique to the database, regardless of the case that is used. For example, jdoe and JDoe are considered the same user name.
- D. When you change your password for any reason, your password:
 - 1. Must contain a minimum of 12 characters.
 - 2. Must contain at least 1 lowercase letter.
 - 3. Must contain at least 1 upper case letter.
 - 4. Must contain at least 1 number.
 - 5. Must contain at least one of the following special characters:

!#%&*^_
 - 6. Cannot be a dictionary word.
 - 7. Cannot be one of the last 24 passwords defined for your account.
- E. The first time you log into the I-Suite application, you must change your password.
- F. You must change your password when it is reset by an administrator (usually the incident CTSP).
- G. Passwords are case sensitive.
- H. If you fail to login with a correct password **5** consecutive times, your user account will be locked.
- I. If your User Account is locked, you must contact your local I-Suite Administrator (CTSP) to unlock your account.
- J. The password for your User Account in I-Suite will expire **60** days for the last date the password was set or reset.
- K. A message will display **3** days prior to the expiration indicating that your password is about to expire. You have the option to change the password at that time or wait.
- L. Once your password is expired, you will be prompted to change it the next time you log into I-Suite. You must change your password or you cannot access the I-Suite application.
- M. You can change your password any time in I-Suite by selecting the **Tools** menu and the **Change Password** option.
- N. If no users with a DB Admin role can access the I-Suite application, contact the Help Desk.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	1.2 - Getting Started with I-Suite
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the components of the I-Suite application.2. Identify the different methods to obtain help for the I-Suite application.

I. HELP

A. There are several methods you can use to receive Help for the I-Suite Application:

1. **Help** is available within the I-Suite application. To access the I-Suite Application Help, select the **Help** drop-down menu at the top of any I-Suite window. When the sub-menu displays, select the **I-Suite Help** option.
2. The I-Suite Website (<http://isuite.nwcg.gov>) contains a wide variety of I-Suite documentation, including:
 - a. Software Downloads
 - b. Updates
 - c. User Guides
 - d. Quick Reference Cards
 - e. Training Material
 - f. Other User Documentation
3. Contact your incident CTSP.
4. **I-Suite User Guides** include information on using the different modules within I-Suite. These are available in a PDF format on the I-Suite Website (<http://isuite.nwcg.gov>).
5. The **Training Materials** demonstrate how to use the I-Suite system. These are also available in a PDF format on the I-Suite Website (<http://isuite.nwcg.gov>).
6. For additional help, contact the **I-Suite Helpdesk**.

NOTE: Contact information for the I-Suite HelpDesk is available by selecting the **Support** option listed under the **Help** Menu in I-Suite.

II. I-Suite Components

A. I-Suite is comprised of the following modules:

1. Database Admin
2. Data Admin
3. Resources
4. Demob
5. Incident Action Plan
6. Time
7. Cost
8. Custom Reports
9. Supply
10. Injury/Illness

STUDENT MANUAL

COURSE	I-Suite
UNIT:	1.3 – I-Suite Common Features.
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the common features of the I-Suite application.<ol style="list-style-type: none">a. Menus.b. Main I-SuiteToolbar.c. Resource Filter buttons.

I. COMMON FEATURES

A. There are many features within I-Suite that are common to most of the modules. These features include:

1. The following drop-down menus are available at the top of each window in the I-Suite system:
 - a. File menu
 - b. Modules menu
 - c. Filters menu
 - d. Reports menu
 - e. Tools menu
 - f. Help menu
3. **Module Buttons** are located on the left side of the **Main** toolbar. Click these buttons to open the indicated module.
4. **Action Buttons** are located on the right side of the **Main** toolbar. These buttons allow you to **Add**, **Edit** and **Delete** entries in the I-Suite system. These buttons also enable you to **Preview** and **Print** reports and **Refresh** the window.
5. Identify the **Incident** on the top right side of the I-Suite window.

II. FILTERS AND GRID

A. Identify where the Filters and Grid are located:

1. The **Filter** toolbar is located beneath the Main toolbar. Click the buttons in this toolbar to filter the Resources grid by **Aircraft**, **Crews**, **Equipment**, **Overhead**, **All Personnel**, or display **All** records.
2. The **Filter Bar** is located above the Resources grid.
3. **Exclude Demobed** is located next to the Filter buttons.
4. **Exclude Filled** is located under Exclude Demobed.
5. The **Resources** grid is located in the center portion of the window, beneath the toolbars. If a plus sign (+) displays next to a resource, click the plus sign to display subordinate resources.

NOTE: The **Resources** grid displays on most, but not all, I-Suite windows.

NOTE: Depending on which module is open, there may be additional buttons and checkboxes.

III. I-SUITE MENUS

A. Identify **File** menu items.

1. **Open Database** - Open an incident database in I-Suite.

2. **Print** - Print a report.
 3. **Refresh Data** - Refresh the data on your window.
 4. **Exit** - Close the I-Suite application.
- B. Select an option from the **Modules** drop-down menu to open that module in the I-Suite system.
- C. Select an option from the **Filters** drop-down menu to filter the **Resources** grid.
- D. Identify the type of **Reports** you can print from the **Reports** menu:
1. Cost Reports
 2. Demob Reports
 3. Plan Reports
 4. Supply Reports
 5. Time Reports
 6. Custom Reports
 7. Injury/Illness Reports
- E. Identify **Tools** menu items.
1. **Options** - Define various I-Suite settings.

NOTE: The settings you can change in **Options** depends on the permissions that are assigned to you in the I-Suite system.

2. **Quick Stats** - Quickly view Stats in the I-Suite system.
 3. **Change Password** - Change your I-Suite password.
- F. Identify **Help** menu items.
1. **I-Suite Help** - Opens Help information for the I-Suite application.
 2. **About** - Displays version information for I-Suite.
 3. **Support** - Displays contact information for the HelpDesk.

NOTE: The **Time**, **Cost** and **Supply** modules have their own menus that display when you are in those modules. The functions within those menus are relevant to the selected module (i.e. under the Cost menu is Graphs, Accruals, etc.)

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	1.4 – I-Suite Options.
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Select options in the I-Suite application.2. Change grid colors.3. Select columns to display.4. Change the order in which grid columns display.

I. OPTIONS

A. Identify options to use in the I-Suite application.

NOTE: The options you can change are based on the rights assigned to you in the I-Suite system.

NOTE: All customizations are specific to the user. Each user account can apply their own customized views for each module.

II. GRID SETTINGS

A. Change Grid colors.

NOTE: Color changes apply to the grids in all modules.

1. Colors for the grids can be changed on the **General** tab on the **Options** window.
2. You can select a different color for each **Grid Area**.
3. Double click the **Color Box** to open the **Color Palette**.
4. When you change the color, you can preview the change under the **Grid Colors** area on the **General** tab.

NOTE: Access the **Options** window from the **Tools** menu.

B. Identify the grid columns to display and the order in which to display them.

1. Identify the grid columns to display on the **Options** window.
2. Grid columns can be defined for each module in I-Suite.
3. The columns that are available for the grid display under **Resource Grid Columns**.
4. The columns with checkmarks next to them are the ones that display in the grid.
5. The order in which the columns display in the grid is the same order in which they display under **Resource Grid Columns**.

NOTE: You can change the order of the columns in the grid by dragging them to a different position under **Resource Grid Columns**.

C. Show the Data Saved Message Box.

1. If the checkbox **Show Data Saved Message Box** is checked on the **General** tab on the **Options** window, the **Data Saved** message displays when the **Save** button is clicked on a window.
2. If the checkbox **Show Data Saved Message Box** is not checked, the **Data Saved** message does not display when the **Save** button is clicked on a window.

D. Format T-Card Labels.

1. T-Card labels can be formatted on the **Resources/Labels** tab on the **Options** window.

NOTE: A special printer must be defined to print T-Card labels.

III. RESOURCE OPTIONS

A. **Other** column titles in the Resources grid:

1. Other column titles for the Resources grid can be changed on the **Resources** tab on the **Options** window.
2. Use the box next to the default **Other** column title to change the title (i.e. to change the name of the **Other 1** column, enter the new name in the box next to **Other 1**).

NOTE: When the title for the **Other** columns are changed on the **Resources** tab in **Options**, the changes are saved to the database. This means that all users will see the changes.

B. Additional kind codes for **QuickStats**:

1. Additional **Kind Codes** for **QuickStats** can be defined on the **Resources** tab on the **Options** window.
2. The **Kind/Position** drop-down contains a list of kind codes you can add to QuickStats.
3. When you add a new code, it displays in the **Additional Kinds used for QuickStats** grid.

NOTE: When you add additional kind codes for **QuickStats**, the changes are saved to the database. This means that all users will see the changes.

C. Each user can identify the **Default Checkin Date and Time** they want to use in I-Suite.

1. Define the **Default Checkin Date and Time** on the **Resources** tab on the **Options** window.
2. You can set the the **Default Checkin Date and Time** to one of the following:
 - **System Date** - Select this option to automatically use the system date and time for the **Check-in**.
 - **Blank** - Select this option leave the **Check-In Date and Time** blank.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	1.5 – Working with Grids.
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Work with grids in the I-Suite application.2. Filter resources.3. Sort resources.

I. GRIDS

- A. Work with grids in the I-Suite application.
- B. Filter Resources
- C. Sort Resources

NOTE: The Grids that display in I-Suite depend on the module that is open.

II. FILTER RESOURCES

A. Filter Buttons:

- 1. **All** - Displays all resources in the grid.
- 2. **Aircraft** - Only displays aircrafts in the grid.
- 3. **Crews** - Only displays crews in the grid.
- 4. **Equipment** - Only displays equipment in the grid.
- 5. **Overhead** - Only displays overhead resources in the grid.
- 6. **All Personnel** - Only displays personnel in the grid.

NOTE: A **Leader** column displays in the grid when the **All Personnel** filter is selected. A checkmark in this column identifies the resource as a leader.

B. Filter Bar :

NOTE: You do not have to enter an entire search term. When you enter the first few characters of a term for any column, all entries that begin with those characters display in the grid.

- 1. Filter terms are entered in the **Filter** boxes above the columns in the grid.
- 2. When defining a filter, you only need to type one or two characters in the **Filter** box. I-Suite filters the grid as you type.

EXAMPLE: To search for all resources with a name that begins with the letter **S**, type that letter in the **Filter** box above the **Name** column.

- 3. Use the **Clear Filter Bar** button to clear any filters entered in the **Filter Bar**.

III. SORT RESOURCES

A. Column Headings:

- 1. When you click a column heading in the grid, the entries are sorted by that column.
- 2. You can sort the grid in either **Ascending** or **Descending** order. When you click the column heading once, it is sorted in **Ascending** order. Click it again to sort it in **Descending** order.

EXAMPLE: To sort grid data by request number, click the **Request Number** column

heading. If the data is in **Ascending** order and you want to display it in **Descending** order, click the column heading a second time.

B. Multiple Sorts:

1. You can use multiple sorts for the data in the grid. For example, you could click the **Overhead** button. Then enter **S** in the filter bar above the **Name** column and **FS** above the **Agency** column. Then click the **Kind Desc** heading to sort the column in ascending order.

NOTE: To use multiple columns to sort the data in the grid, hold down the **Shift** key and click each column heading you want to include in the sort.

C. Print the Sorted/Filtered Grid.

1. If you want to print a filtered/sorted grid, you would first need to **Filter** the grid. Then **Sort** it in the appropriate order.
2. When you click the **Print** button in the **Main** toolbar, a report with the filtered grid is sent to your default printer.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	1.6 – I-Suite Modules.
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify how roles determine access to each of the I-Suite modules.2. Identify the I-Suite modules.

I. USER ROLES

A. Identify how roles determine access to each of the I-Suite modules.

1. Access to each of the I-Suite Modules is determined by the user's assigned role. A User's role may include access to multiple modules (e.g. Resources and Time).

II. I-SUITE MODULES

A. Identify the function of the I-Suite Modules:

1. **Database Admin** - This module is used to Manage the Database. Access this module from the **Modules** drop-down menu. The following **Action** buttons display on the left side of the window:
 - a. **Attach** - attaches databases to the I-Suite application.
 - b. **Detach** - detaches database from the I-Suite application.
 - c. **Backup** - backs up the databases.
 - d. **Restore** - restores a backup database.
 - e. **Copy/New DB** - creates and copies databases.
 - f. **Rename** - renames a database.
 - g. **Create Repository** - creates a data repository file that can be uploaded to the repository site.
 - h. **Purge SSN/EIN** - changes all social security numbers and EINs to 9's.
 - i. **Import Data** - imports data into I-Suite.
 - j. **Export Data** - creates export data files from I-Suite.
 - k. **IMS** - merges databases.
 - l. **Users** - sets up I-Suite users and defines their permissions in the I-Suite system. There are two levels of users - Admin (server rights), and I-Suite (database rights). An Export and Import option are available to move users between databases.

NOTE: A unique user name and password must be defined for each user in the database.

2. **Data Admin** - All incident data and lookup tables are managed through the Data Admin Module. Use the options in this module to:
 - a. Define incidents in I-Suite.
 - b. Manage accounting codes.
 - c. Define non-standard lookup tables.
3. **Resources** - The Resources Module is the primary data entry point for I-Suite. Keep the following points in mind when using the Resources module:
 - a. The **Add/Edit** screen can be accessed from each module.

- b. Enter **Common Data** for each resource in the area just beneath the **Resources** grid.
 - c. **Module** tabs display at the bottom of the **Resources** window. The tabs that display are based on the permissions that the user has in I-Suite.
- 4. **Demob** - The Demob module provides additional fields and reports for demob planning, reassignment and release.
 - a. Use the **Action** buttons - **P** (Group Pending), **D** (Group Demob), and **N** (No Grouping) - on the left side of the **Demob** toolbar to change the status assigned to resources. Use the other buttons to generate Demob reports.
 - b. The **Default Data** from check-in displays in the area on the left side of the window.
 - c. **Tentative Release** information is defined in the center section on the Demob window.
 - d. **Actual Release** information is defined in the area on the right side of the window.
- 5. **IAP** - The IAP module utilizes the I-Suite database to create several of the ICS forms.
 - a. Use the buttons in the IAP toolbar to create and maintain ICS forms.
 - b. Forms created in IAP display in the Tree View.
 - c. The user can create the following ICS forms in IAP: ICS202, ICS203, ICS204, ICS205, ICS206 and ICS220.
- 6. **Time** - The Time Module allows the user to manage time records, create payment documents and reports. Use this module to:
 - a. Post personnel, crew, and contract time.
 - b. Post commissary adjustments.
 - c. Edit roster data.
 - d. Print invoices (OF-286 and OF-288).
- 7. **Cost** - The Cost Module is a tool to analyze and report cost data. Use this module to:
 - a. Generate daily cost records.
 - b. View daily cost records.
 - c. Edit daily cost records.
- 8. **Custom Reports** - Custom reports may be created using the Report Designer or by using the Advanced Designer.
 - a. **Report Designer**: Use pre-defined views and fields to design and run reports.
 - b. **Advanced Designer** - Use SQL statements to design and run reports.
- 9. **Supply** - The Supply Module allows the user to:
 - a. Track, issue and return items for resources and locations.

10. **Injury/Illness** - The Injury/Illness module allows the user to:
 - a. Track injuries, illnesses and prevention for an incident.