



UNIT 4

I-Suite Resources

12/12/2007

This Training Manual is for use with the 7.01.05 version of the I-Suite System.

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Changes in Training Manual

The following changes were made to the Resources Training Manual for the 7.01.05 release:

Roster Crew Members

- When rostering Crew Members, users can now add Plans and Cost data, as well as Time data (*See To roster a person to a resource: on Page 5*).

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	4.0 – Resources: Overview.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the primary purpose of the Resources module.2. Identify Options on the Resources window.

I. RESOURCES

A. Review the Resources module.

NOTE: The Resources module shares data with other I-Suite modules.

1. The primary purpose of the Resources module is to provide a standardized method to check-in resources when they arrive at an incident. This makes record keeping and status assessment easier.
2. Resources also produces various incident reports, including the 209 Report Data Table, Section Report, Qualifications Report, and Daily Incident Reports.

II. RESOURCES WINDOW

A. Review the Resources window:

1. The **Print T Card Label** button displays to the right of the Filter toolbar. Use this button to print T Card Labels at your default printer, which is defined in **Tools/Options**.
2. The **Resources** grid displays beneath the toolbars in the center part of the window. This grid contains a list of all resources currently defined in the system.
3. When you click either the **Edit** or **Add** button in the **Main** toolbar, a **Manage Resource** area displays at the bottom of the window. Use this area to edit or add resources.
4. Depending on the user rights assigned to you, the following tabs may display at the bottom of the window:
 - **Plans** - This tab displays for users with Resource rights.
 - **Time** - This tab displays for users with Time rights.
 - **Cost** - This tab displays for users with Cost rights.
5. A toolbar displays at the bottom of the Manage Resources area. The buttons in this toolbar include:
 - a. Close
 - b. Add
 - c. Clear
 - d. Previous
 - e. Next
 - f. Save
 - g. Roster (For a non-person resource)
 - h. Add New Component (For a Strike Team/Task Force)

- i. Add Existing Resources/Remove Component (For a Strike Team/Task Force)

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 4.1 – Resources: Options.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Define Resource Options, which includes:
 - Selecting Resource Grid Columns and set order.
 - Changing “Other” Column Titles.
 - Setting Default Check-in Date.
 - Changing Quick Stats kinds.
 - Displaying Quick Stats.
 - Defining Label Settings

I. RESOURCE OPTIONS

- A. Select Resource Grid Columns and set order.
- B. Change "Other" Column Titles.
- C. Set Default Check-in Date.
- D. Change Quick Stats kinds.
- E. Display Quick Stats.
- F. Define Label Settings.

II. RESOURCES GRID

- A. To identify the columns to display in the grid and the order in which to display them:
 1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
 2. Click the **Resources** tab. Then click to select the lower **Resources** tab.

NOTE: The lower **Resources** tab on the **Options** window allows you to define the options available on the Resources window.

3. Under **Resource Grid Columns**, click to check the checkbox next to each of the columns you want to display in the grid.

NOTE: You can also click to highlight a column, and then click the **Show** button to display that column in the grid. If you want to remove the selected columns from the **Resources** grid, click the **Hide** button.

3. To adjust the order in which the columns display in the **Resources** grid, click a column. Then click the **Move Up** or **Move Down** button to move the column.
 4. When finished, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

III. "OTHER" COLUMN TITLES

- A. To change "Other" Column Titles:
 1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
 2. Click the **Resources** tab. Then click the lower **Resources** tab.

NOTE: The "**Other**" columns are useful for filtering specific information (e.g. Team Member, EMT, etc).

3. If you want to change the titles that display for the "**Other**" columns, type the new name for the column in 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**). You can change the title for the following columns:
 - a. Other 1.

- b. Other 2.
- c. Other 3.

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.

- 4. When finished, click the **Save** button, and then click **OK** to close the **Options** window.

IV. DEFAULT CHECK-IN DATE AND TIME

A. To set the Default Check-in Date and Time:

- 1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
- 2. Click the **Resources** tab. Then click the lower **Resources** tab.
- 3. If you want to automatically insert the system date and time for the **Check-In Date and Time**, click the **System Date** option in the **Default Check-In Date and Time** box.

If you want to leave the **Check-In Date and Time** blank, click the **Blank** option in the **Default Check-In Date and Time** box.

V. QUICK STATS

NOTE: Quick Stats contains useful information for the IC or Section Chiefs for a quick picture of incident resources.

A. To change the kinds included in Quick Stats:

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.

- 1. From the **Tools** drop-down list, select **Options** to open the **Options** window.
- 2. Click the **Resources** tab. Then click the lower **Resources** tab.
- 3. Under **Additional Kinds used for QuickStats**, select the code you want to add from the **Kind/Position** drop-down list. Then click the **Save** button.

To remove **Kind Codes for QuickStats**, click the selector button next to the code listed under **Additional Kinds used for QuickStats**. Then click the **Delete** button at the bottom of the Options window.

- 4. When finished, click the **Save** button to save your changes. Click the **OK** button to close the **Options** window.

B. To display Quick Stats:

- 1. From the **Tools** drop-down menu, select **Quick Stats**.

VI. RESOURCE LABELS

NOTE: Use this option to set the default printer for T-Card labels.

A. To define Label settings:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
2. Click the **Resources** tab. Then click the **Labels** tab.
3. From the **Special Purpose Label Printer** drop-down list, select the label printer to use.
4. In the **First Fontsize** box, enter the font size to use for the first line on the label.
5. In the **Second Fontsize** box, enter the font size to use for the second line of the label.
6. In the **Top Offset** box, enter the print offset to use at the top of the label. This identifies the amount of space to insert at the top of the label.
7. In the **Left Offset** box, enter the print offset to use on the left side of the label. This identifies the amount of space to insert on the left side of the label.
8. From the **Font Name** drop-down list, select the type of font to print on the label.
9. Click the **Save** button to save your changes. Click the **OK** button to close the Options window.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	4.2 – Resources: Filtering Data.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Use the Filter bar.2. Filter using Exclude Demobed/Exclude Filled.3. Filter with the filter buttons.4. Sort using table column headers.

I. FILTER RESOURCES

- A. Use the Filter bar.
- B. Filter using Exclude Demobed/Exclude Filled.
- C. Filter using the Aircraft, Crews, Equipment, Overhead, All Resources, and All Personnel buttons.
- D. Sort using table column headers.

II. FILTER BAR

- A. To use the Filter bar:

NOTE: You can search for specific characters in any column.

1. Open the **Resources** module.
2. On the **Filter Bar**, click in the **Filter** box above the column you want to filter.
3. In the **Filter** box, type the first several characters of the term by which you want to filter the data.

EXAMPLE: Type **AIR** in the **Filter** box above the **Kind Desc** column heading to only display resources with Kind descriptions that begin with **AIR**.

4. To remove your filter, either delete the characters that you typed or click the **Clear Filter Bar** button to the left of the **Filter Bar**.

NOTE: You can filter by multiple columns at the same time by entering filter criteria in each of the columns you want to use.

III. EXCLUDE DEMOBED/EXCLUDE FILLED

- A. To use the **Exclude Demobed** checkbox to filter:

1. Open the **Resources** module.
2. On the **Resources** window, click to check the **Exclude Demobed** checkbox. This removes all demobed resources from the grid.

- B. To use the **Exclude Filled** checkbox to filter:

1. Open the **Resources** module.
2. On the **Resources** window, click to check the **Exclude Filled** checkbox. This removes all resources with a **Filled** status from the grid.

IV. FILTER TOOLBAR

- A. To filter using the Aircraft, Crews, Equipment, Overhead, All Resources, and All Personnel buttons:

1. Open the **Resources** module.
2. On the **Resources** window, click the **Aircraft, Crews, Equipment, Overhead, All**

Resources, or **All Personnel** button to filter the grid based on your selection.

V. SORT RESOURCES GRID

A. Sort using table column headers.

1. Open the **Resources** module.
2. In the **Resources** grid, click the column heading you want to use to sort the information in the grid. For example, if you click the **Name** column heading, the information is sorted in **Name** order.
3. Click the heading once to sort the information in **Ascending** order. Click the heading a second time to sort in **Descending** order.

NOTE: To use multiple columns to sort the data in the grid, click an initial column heading by which to sort. Then hold down the Shift key and click each additional column heading.

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 4.3 – Resources: Managing Data and Resources.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Identify the importance of data entry guidelines.
 2. Identify common data.
 3. Manage all incidents as one.
 4. Manage incidents separately.
 5. Add Resources (Aircraft, Overhead, Crews, Equipment).
 6. Create a Strike Team/Task Force Parent Record.
 7. Attach new resources to a Strike Team/Task Force Parent Record.
 8. Attach existing resources to a Strike Team/Task Force Parent Record.
 9. Edit Resources (Aircraft, Overhead, Crews, Equipment).
 10. Refresh Data
 11. Delete Resources

I. MANAGE RESOURCES

- A. Identify the importance of data entry guidelines.
- B. Identify common data.
- C. Manage all incidents as one.
- D. Manage incidents separately.
- E. Add Resources (Aircraft, Overhead, Crews, Equipment) using an ICS 211 or optional check in form.
- F. Create a Strike Team/Task Force (Parent Record).
- G. Attach new resources to a Strike Team/Task Force Parent – Method 1.
- H. Attach existing resources to a Strike Team/Task Force Parent – Method 2.
- I. Edit Resources
- J. Refresh Data
- K. Delete Resources

II. DATA ENTRY GUIDELINES

- A. Review and discuss the importance of data entry guidelines.

NOTE: ROSS Import data will follow ROSS data standards. ROSS information that is imported into I-Suite includes Resource Name, Request Number, and Mob Date. It may also include Agency, HomeUnit, KindCode, and JetPort if they are defined in ROSS.

Make sure you check the imported ROSS information at check-in for accuracy. There may be incorrect or missing data. Also check Crew Rosters with the CRWB.

NOTE: If you are working with a team, follow the team's protocol or Standard Operating Procedures for data entry.

1. In **Resources**, data is organized and presented based on the ICS 211 form.
2. Before saving a resource, you must define the required information.

NOTE: If information is required, an asterisk (*) displays to the left of the label.

This required information includes:

- a. Request Number.

NOTE: The request number must begin with one of the following letters: **A, C, E, I, O, or S.**

- b. Account Code.
- c. Resource Name.
- d. Kind/Position.

- e. Status.
- f. Configuration.

NOTE: The **Agency** and **Unit ID** are important fields, but they are not required. Entering incorrect data in these fields is worse than having no data defined. An incorrect **Agency** code will generate incorrect **Cost** data.

- 3. Before rostering resources or adding additional qualifications, you must define the required information and save the resource.

III. COMMON DATA

A. To review common data:

- 1. From the **Modules** drop-down menu, select **Resources**.

OR

Click the **Resources** button in the **Main** toolbar.

- 2. On the **Resources** window, click the **Add** button.

NOTE: Entry items located above the tabs (i.e. just below the **Manage Resource – Add Mode** label) are common to all I-Suite modules.

NOTE: Data entry items for specific modules are located on their respective tabs (i.e. on the **Plans**, **Cost**, and **Time** tabs). The tabs that display are based on the rights assigned to the user.

NOTE: Resources is the primary data entry point for I-Suite data. The quality of the initial data is critical to successful integration of the data in other I-Suite modules.

NOTE: Understanding the concept of data sharing is critical. Data is shared between all I-Suite modules. Changes, additions, or deletions from any functional area effects the other I-Suite modules. Successful integration requires cooperation and established Data Ownership Rules. If you are working with a team, follow the team's protocol or Standard Operating Procedures for data entry.

IV. MANAGE INCIDENTS

A. To Manage all incidents as one:

NOTE: This is used if multiple incidents are created in the same database.

- 1. On the top right side of the window, click to check the **Manage All Incidents As One** checkbox.
- 2. When the **Manage All Incidents as One** message displays, click the **OK** button.

NOTE: When adding a resource with **Manage All Incidents As One** selected, an **Incident Name** drop-down box displays on the **Manage Resource – Add Mode** window. Verify that the correct incident appears in the **Incident Name** box.

B. Manage incidents separately.

1. On the top right side of the window, click to uncheck the **Manage All Incidents As One** checkbox.
2. From the **Incident** drop-down list, select the **Incident** you want to manage.

NOTE: When **Managing Incidents Separately**, make sure you verify that the correct incident is selected in the **Incident** box.

V. ADD RESOURCES

A. To add Resources (Aircraft, Overhead, Crews, Equipment) using an ICS 211 or optional check-in form:

1. Open the **Resources** module.
2. Click the **Add** button in the **Main** toolbar.
3. On the **Manage Resource – Add Mode** window, enter the following information:
 - a. Request Number
 - b. Account Code
 - c. Resource Name

NOTE: When the **Person** checkbox is checked, **Resource Name** is replaced with **Last Name** and **First Name**. On the **Plans** tab, an **Other Quals** section displays.

- d. Kind/Position
 - e. Trainee checkbox (Optional)
 - f. Status
 - g. Unit ID (Optional)
 - h. Agency (Optional)
 - d. Configuration
 - e. Actual Release Date (Optional)
 - f. Actual Release Time (Optional)
4. On the **Plans** tab, define the following information, as needed:

NOTE: The **Plans** tab only displays when the user has Resource rights.

- a. Check-In Date
- b. Check-In Time
- c. Num Personnel
- d. Demob City
- e. Demob State
- f. Jetport

- g. Travel Method
- h. Mobilization Date
- i. Length of Assignment (Days)
- j. Demobilization Date

NOTE: The **Demobilization Date** is calculated from the **Mobilization** and **Length of Assignment**. Discuss with your Resource Unit Leader.

- k. Other (1, 2, & 3)
 - l. Vehicle ID
 - m. Original Order/Request Number
 - n. Plans Remarks
4. Click the **Save** button.
5. To enter other quals for a person:
- a. Under **Other Quals**, select the appropriate kind code from the **Kind Code** drop-down list.
 - b. If the person is a trainee for the selected kind code, click to check the **Trainee** checkbox.
 - c. To save other quals, click the **Save Quals** button.
6. To roster a person to a resource:

NOTE: The **Person** checkbox must be unchecked to Roster a person to a resource.

NOTE: To Roster a person, the resource must be saved.

- a. Click the **Roster** button.
- b. On the **Roster Resource – Add Mode** area, enter the appropriate information for the person being rostered to the resource including:
 - Request Number
 - Leader checkbox (Optional)
 - Last Name
 - First Name
 - Kind/Position
 - Trainee checkbox (Optional)
 - Status
 - Unit ID (Optional)

- Agency (Optional)
 - Actual Release Date (Optional)
 - Actual Release Time (Optional)
- c. On the **Plans** tab, enter the following information, as needed:
- Check-in Date
 - Check-in Time
 - Demob City
 - Demob State
 - Jetport
 - Travel Method
 - Other Quals

NOTE: The **Plans** tab only displays when the user has **Plan** rights.

- d. On the **Time** tab, enter the appropriate Time data.

NOTE: The **Time** tab only displays when the user has Time rights.

- e. On the **Cost** tab, enter the appropriate Cost data.

NOTE: The **Cost** tab only displays when the user has **Cost** rights.

- e. Click the **Save** button.

NOTE: There are two methods for creating a Strike Team/Task Force. Use the **First Method** when a group of resources not defined in the I-Suite database was ordered as a Strike Team/Task Force.

Use the **Second Method** when assembling a Strike Team/Task Force at the incident from resources that already exist in the I-Suite database.

Both methods require you to create a **Parent Record** or **Place Holder**. You then need to add or attach the **Strike Team/Task Force Components** to the Parent Record.

B. Create a Strike Team/Task Force (Parent Record).

1. Open the **Resources** module.
2. Click the **Add** button in the **Main** toolbar.
3. On the **Manage Resource – Add Mode** window, enter the appropriate information, including ALL required information.
 - a. When selecting the **Kind/Position**, select a type applicable to the type of Strike

Team (e.g. select “ES3” for a type 3 strike team).

- b. When selecting the **Configuration**, select **S/T**. Notice that the label **Manage Resources – Add Mode** changes to **Add Strike Team / Task Force**. The **Roster** button is replaced with two new buttons for adding components.

NOTE: You cannot roster people to a Strike Team / Task Force parent.

- c. On the **Plans** and other tabs, complete the information, as needed.
4. To complete the Strike Team/Task Force parent record, continue with **Method 1** or **Method 2**.

NOTE: Use Method 1 to add Strike Team Or Task Force Components that do not already exist in the I-Suite database.

NOTE: If you add the Strike Team Leader last, you will not have to change the KindCode.

C. To attach new resources to a **Strike Team/Task Force Parent – Method 1:**

1. On the **Add Strike Team/Task Force** window, click the **Add New Component** button.
2. When the **Add New Strike Team/Task Force** message displays, click **Yes** to save the parent record.
3. On the **Add New Strike Team/Task Force Component** window, enter the appropriate common information.

NOTE: The **Configuration** defaults to **C** for component.

4. On the **Plans** tab and other tabs, complete the information, as appropriate.

NOTE: In the **Num Personnel** box, type the total number of people on the Strike Team/Task Force component.

5. **Roster** crew members, as needed.
6. To save the **Strike Team/Task Force Component** after entering the appropriate information, including ALL required information, click the **Save** button.
7. When the **Data Saved** message displays, click the **OK** button.
8. Continue adding components, as needed.
9. After adding the final component, click the **Close** button.

NOTE: Several boxes are automatically completed based on the Parent Record. Review this information for accuracy. Make sure you change the **Kind Code** when Rostering people.

NOTE: Use **Method 2** to add Strike Team or Task Force Components that already exist in the I-Suite database.

D. To attach existing resources to a **Strike Team/Task Force Parent – Method 2:**

1. On the **Add Strike Team/Task Force** window, click the **Add Existing Resource**

button.

2. When the **Add Strike Team/Task Force** message displays, click the **Yes** button to save the parent record.
3. On the **Add Existing Strike Team/Task Force Component** window, click one or more resources listed in the grid to add to the Strike Team/Task Force. Then click the **Add** button.
4. Repeat step 3 for each resource you want to add to the Strike team/Task Force.

NOTE: If you want to remove a resource that was added to the Strike/Team Task force, click the resource in the grid at the top of the window. Then click the **Remove Component(s)** button that displays beneath the grid.

5. After adding all appropriate components to the Strike Team/Task Force, click the **Close** button.

VI. EDIT RESOURCES

A. Edit Resources (Aircraft, Overhead, Crews, Equipment).

1. Open the **Resources** module.
2. In the **Resources** grid, click to select the resource you want to edit.
3. Click the **Edit** button in the **Main** toolbar.
4. On the **Manage Resource - Edit Mode** window, edit the appropriate information.
5. Click the **Save** button to save your changes.

B. Refresh Data.

1. Click the **Refresh** button in the toolbar.

C. Delete a Resource.

1. Open the **Resources** module.
2. In the **Resources** grid, click to select the resource you want to delete.
3. Click the **Delete** button in the **Main** toolbar.
4. Review the delete warning message.
5. To commit the delete request, click the **Yes** button.

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 4.4 – Resources: Resources Reports.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Run and print standard reports.

I. RESOURCE REPORTS

A. Run and print standard reports.

II. PRINT RESOURCE REPORTS

A. Run and print standard Resources reports.

NOTE: I-Suite includes a number of features you can use to produce standard Resource reports.

1. Click the **Reports** button in the toolbar. Then click to select the **Plans** tab.

OR

From the **Reports** drop-down menu, select **Plans Reports**.

2. Under **Reports**, click to select one of the following reports:

- a. **Aircraft Report** - This report identifies the aircraft on the incident. You can print the report for:
 - aircraft that is checked-in, pending, or in staging,
 - demobed or reassigned aircraft,
 - aircraft pending demob,
 - aircraft that is not demobed,
 - filled aircraft assignments,
 - unfilled aircraft assignments,
 - or all aircraft resources.
- b. **Crew Report** - This report identifies the crews on the incident. You can print the report for:
 - crews that are checked-in, pending, or in staging demobed or reassigned crews,
 - crews pending demob,
 - crews that are not demobed,
 - filled crew assignments,
 - unfilled crew assignments,
 - or all crew resources.

- c. **Equipment Report** - This report identifies the equipment on the incident. You can print the report for:
- equipment that is checked-in, pending, or in staging,
 - demobed or reassigned equipment,
 - equipment pending demob,
 - equipment that is not demobed,
 - filled equipment assignments,
 - unfilled equipment assignments,
 - or all equipment resources.
- d. **Overhead Report** - This report identifies the overhead personnel on the incident. You can print the report for:
- overhead personnel that are checked-in, pending, or in staging,
 - demobed or reassigned overhead personnel,
 - overhead personnel pending demob,
 - overhead personnel that are not demobed,
 - filled overhead personnel assignments,
 - unfilled overhead personnel assignments,
 - or all overhead personnel resources.
- e. **209 Resource List** - This report contains ICS-209 information for Block 29 of the FAMWEB ICS 209 generated by the Situation Unit Leader.

NOTE: The 209 Report uses the number of people from the Strike Team/Task Force parent.

- f. **Qualifications Report** - This report identifies the positions/kind codes defined in the I-Suite database and those resources that are assigned to the positions. You can filter the information in this report to include:
- One, several, or all kind codes.

NOTE: If the **All Kinds** checkbox is checked, all kinds are included. If the **All Kinds** checkbox is not checked, only those kinds listed under **Selected Kinds** are included. To include a kind, click the kind under **Kind Codes**. Then click the > button to move it under **Selected Kinds**.

NOTE: Use the **Kind Search** filter box to quickly find kind codes to use as a filter. When you enter data into this box, the kind code that matches is highlighted. Click the > button to move

the kind under **Selected Kinds**.

- No Trainees (Exclude Trainees)
- Trainees Only

NOTE: An asterisk (*) notes that the person is currently assigned to that position.

g. **Section Report** - This report identifies those resources assigned to different sections (e.g. Command Staff, Operations Section, etc.).

3. For the **Report** you selected in step 2, complete the following **Report Parameters**, as appropriate:

NOTE: Some standard reports do not have **Report Settings** (i.e. the 209).

- a. Under **Sort**, click to select the sorts to use when creating the report. Click the sort options in the order in which you want the information sorted.
 - b. If you want to include the Strike Team/Task Force Components in the report, click to check the **Include strike team/task force components** checkbox.
 - c. If you want to include sub-totals for the first sort that you selected, click to check the **Subtotals on first sort** checkbox.
4. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.
 5. To print the report without previewing, click the **Print** button.