IROC

Student Guide

IROC Interagency Resource Ordering Capability

Table of Contents

The Structure of IROC Portal

From the IROC portal homepage, you can view information, create incidents, and make requests and assignments for resources. This page is designed with five primary functional areas.

1 **Portal Banner** – Provides application information.

- a **IROC logo** – Click to return to homepage.
- b **Instance** – Current ServiceNow instance.
- c **Time and Date** – Current date, time, and time zone.
- d **Notifications** – System alerts or notifications.
- e **Quick Links** – Links to reports, DMT, and help.
- f **User** – Drop-down menu to update user profile or log out of the user session.
- g **User Content** – Current dispatch.

2 **Quick Search** – Search IROC to quickly find information. Enter a term or text to perform a type-ahead search.

3 **Content Selectors** – Filter incident, dispatch, and catalog records by setting a user context for each.

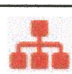
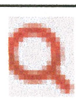
4 **Action Tiles** – Access or create incidents, requests, and resources.

- a Click an icon in each action tile to create records.
- b Click a red selector bar at the top of each tile to filter the information shown in the dynamic scoreboard.
- c The dynamic scoreboard provides a quick situational view of the data chosen in the selector bar.
- d Click the list selector bar at the bottom of the tile to open the work area for that tile.

5 **Main Work Area** – View or take action on incidents, requests, or resources.

IROC Portal User Interface Icons

Common features and commands are represented by icons in the IROC portal.

Icon	Name	Action
	Edit	Edit a record
	Delete	Delete a record
	Documentation	Add documentation/journal entries
	Add	Create a record
	Menu	View menu options
	Download	Export records to MS Excel or PDF
	Calendar	Set the date/time
	Watch	Watch an Incident
	Roster	Create and view rosters
	Search	Open the search screen
	Create	Create a new record
	Attach	Attach files to a record

Basic IROC Training: Student Guide

1. Navigating the IROC Portal

Contents

1. Objectives

Upon completion of this unit, you will be able to:

- Log in to IROC Portal.
- Navigate the IROC Portal homepage.
- Recognize and use common user interface icons.
- Navigate the action tiles.
- Navigate the work area in list view and accordion view.

2. Overview

The Interagency Resource Ordering Capability, or IROC, is a web-based cloud application accessible from your Internet browser. IROC provides a modern tool to support the interagency wildland fire community in ordering, tracking, and managing resources in response to wildland fires and all-hazard incidents.

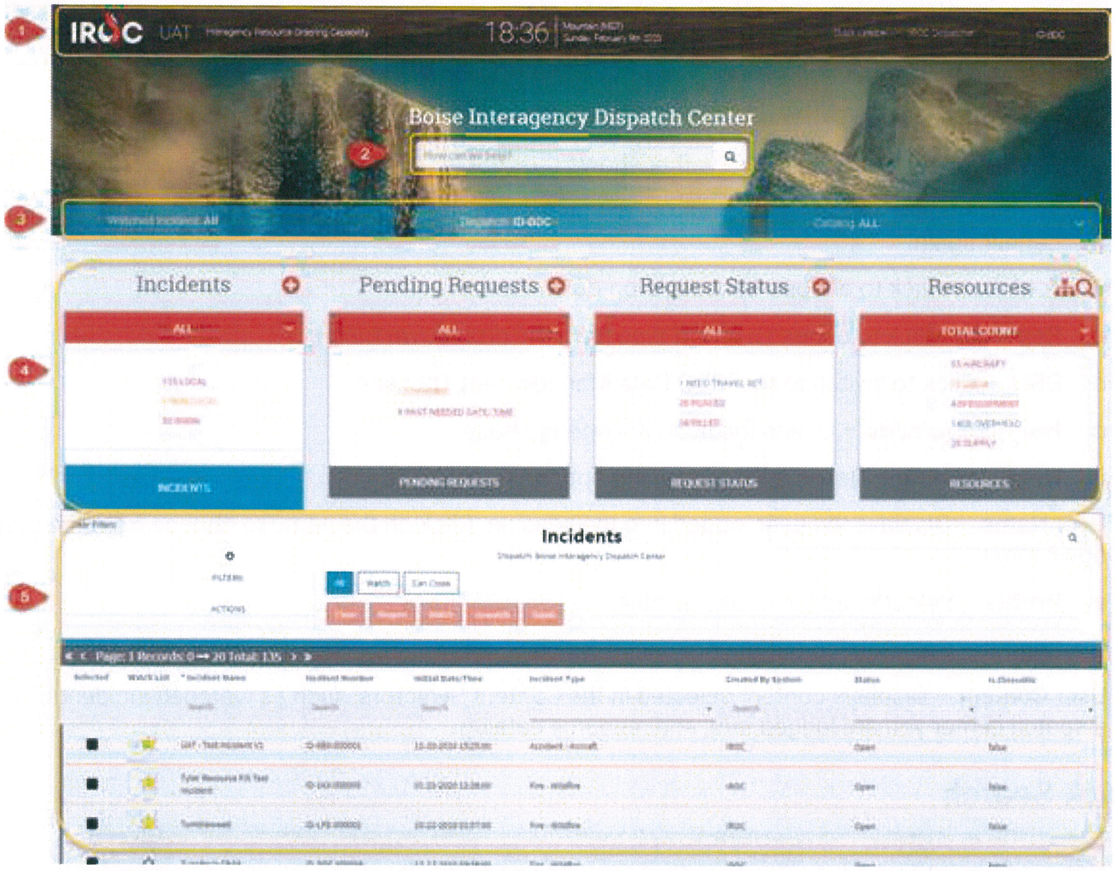
IROC is available to users through two web applications: IROC Portal and IROC Data Management Tool (DMT). IROC Portal is an application for users who perform daily dispatch-related functions, such as dispatchers, who create and manage IROC incidents and resource requests. The DMT is an application for users who perform more advanced and administrative functions within IROC, such as dispatch managers and IROC administrators.

This document describes the general layout and operation of the IROC Portal user interface. The screens, functions, and terminology introduced here will be used throughout the IROC training material.

This student guide can be used in conjunction with the Navigating the IROC Portal video, which serves as a pre-requisite for the IROC Basic User Training.

3. The Structure of IROC Portal

From the IROC Portal Homepage, you can view information, create incidents, and make requests and assignments for resources. This page is designed with five primary functional areas.



1 **Portal Banner –** Provides application information.

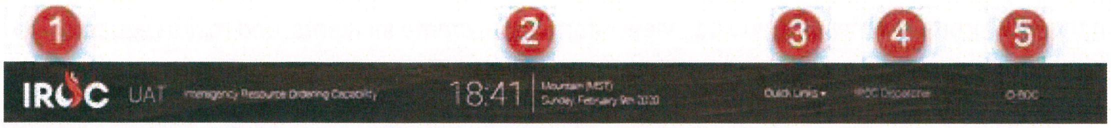
2 **Quick Search –** Search IROC to quickly find information.

3 **Content Selectors –** Filter incident, dispatch, and catalog records by setting a user context for each.

4 **Action Tiles –** Access or create incidents, requests, and resources.

5 **Main Work Area –** View or take action on incidents, requests, or resources.

The Portal Banner



1 **IROC logo** – Clicking on this logo from any screen brings you back to the homepage.

2 **Time and Date** – Shows the current date, time, and time zone for your jurisdictional unit.

   a Clicking on this brings up a view that shows the time in other zones.

   b To close this view, click the small x in the upper right corner or simply click on the time in the banner again.

3 **Quick Links** – Click to choose from the drop-down menu:

   a **Reports** – Click to choose a report type from the drop-down menu.

   b **DMT** – Click to switch to the IROC Data Management Tool site.

   c **Help–Knowledge** – Opens the IROC Knowledge Base.

   d **Help–Training** – Opens a list of training options.

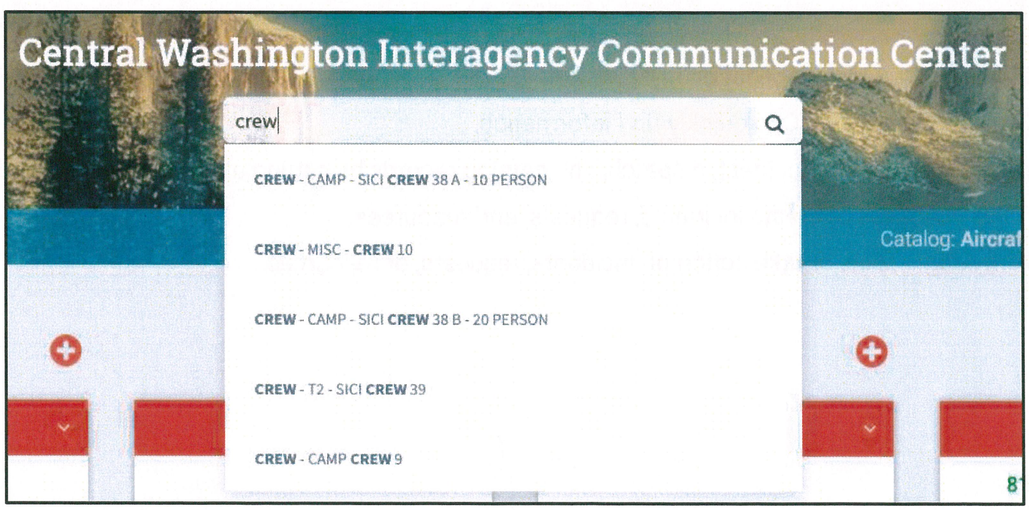
4 **User Name** – Displays the user logged into the session. Click on the name to choose from the drop-down menu.

   a **Profile** – Select to edit your user profile.

   b **Logout** – Select to log out of your user session.

5 **User Content** – Displays content selected in the Content Selectors, such as watched incidents, dispatch center you are logged into, and resource catalog.

Quick Search

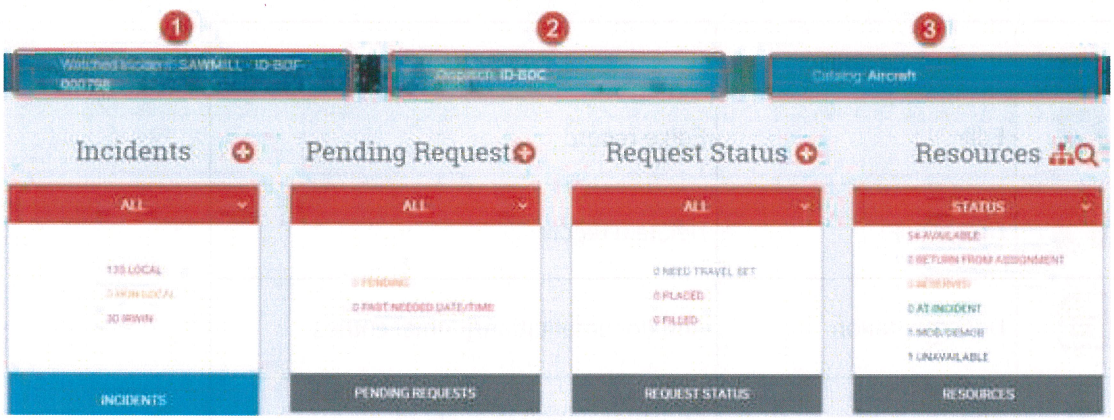


Input text in this type-ahead field to easily search for information related to resources and incidents.

> **Note:** Most drop-down menus allow you to perform a type-ahead search. Simply start typing in the field, and IROC will filter the list to match your entry.

Content Selectors

Use these selectors to determine the content for searches and record entry.



1 **Watched Incident** – Click to select an incident from the drop-down menu for editing and resource management.

2 **Dispatch** – Click to select a dispatch center from the drop-down or enter text to perform a search.

> **Note:** An IROC administrator assigns users to specific dispatch centers.

3 **Catalog** – Click to select a catalog category (or choose "All Catalogs") from the drop-down menu.

> **Note**: In this screenshot, the **Aircraft** catalog was selected. The Resources action tile shows the status for all aircraft in your dispatch center. If **All Catalogs** had been selected, the Resources action tile would show the total count for each catalog category (aircraft, crew, equipment, overhead, and supply).

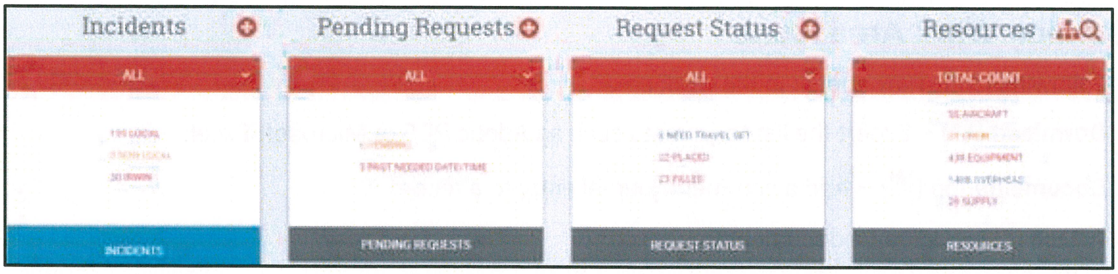
4. IROC Portal User Interface Icons

Common features and commands are represented by icons in the IROC portal.

Icon	Name	Action
	Edit	Edit a record
	Delete	Delete a record
	Documentation	Add documentation/journal entries
	Add	Add information to a record
	Menu	View menu options
	Download	Export records to MS Excel or PDF
	Calendar	Set the date/time
	Watch	Watch an Incident
	Roster	Create and view rosters
	Search	Search records
	Create	Create a new record
	Attach	Attach files to a record

5. Navigating the Action Tiles

From the action tiles, you can create, search, view, and modify incidents, requests, and resources. Each tile includes action tile icons, dynamic scoreboards, and list selectors.



1 **Action Tile Icons** – These icons appear to the right of the action tile header. Use them to quickly search or create incidents, requests, or rosters.

a **Create** () – Clicking this icon opens a screen where you can create new incidents or requests.

Note: Dispatch Managers will have a **Create** icon on the Resources action tile.

b **Roster** () – Clicking this icon opens a screen where you can create a roster or modify an existing one.

c **Search** () – Clicking this icon opens a screen where you can quickly search for and modify resources.

2 **Dynamic Scoreboards** – Each scoreboard provides a quick situational view of data for the chosen content of each action tile. Filter each scoreboard by clicking the red selector bar at the top of the tile.

Note: The scoreboard may take time to populate after changing the filter.

a **Incidents** – Shows the total number of local, non-local, or IRWIN incidents.

Note: Selecting **IRWIN** from the drop-down will open the Staging Incidents work area on the bottom half of the screen.

b **Pending Requests** – Shows the total number of local (selected dispatch center) and non-local pending requests, including the number of pending requests and of those past needed. Choosing Non-Local will show pending request placed to a parent, selection area, and subordinate organizations.

c **Request Status** – Shows the number of requests for the local or non-local dispatch center. The scoreboard will display the number of requests waiting on travel, as well as the number placed and filled.

d **Resources** – Depending on the chosen content selector, this scoreboard will show the total count of items in each catalog category or the status counts for the selected resource catalog (available, return from assignment, reserved, at incident, MOD/DEMOB, and unavailable).

3 **List Selector** – Clicking on the gray bar at the bottom of each action tile opens the work area associated with it.

6. Navigating the Work Area

The work area displays actionable records filtered by user content and selections made in the action tiles. Each work area may be viewed in one of two modes: **list view** or **accordion view.**

Common Work Area Icons

The following icons may appear in the work area.

1 **Download** () – Export the list to formats such as Adobe PDF or Microsoft Excel.

2 **Documentation** () – Add a comment/journal entry to a record.

3 **Attach** () – Upload a document to a record.

Working in List View

The list view in the work area displays a searchable, filterable list of records. Clicking on box(es) in the "Selected" column allows you to perform actions on one or more records. You can also filter and export data to either Microsoft Excel or Adobe PDF.

1 **Quick Filters –** Use these action buttons to filter list view information based on preset criteria.

2 **Action Buttons –** After selecting one or more records, you can perform specific actions, such as open, close, set status, etc.

3 **Page Selector –** Moves forward and backward in the table rows. Select the forward or backward icons (double arrows) to move 20 records at a time (single arrows) or to the beginning or end of the table (double arrows).

4 **Column Sort –** Click on a column heading to sort the list by that field.

5 **Search Fields –** Filter list results by entering search criteria in the search fields beneath each column head.

   a Enter a term into one or more search fields and then press the **Enter** key to filter the columns.

   b To remove a search term, delete the text from the search field and press the **Enter** key.

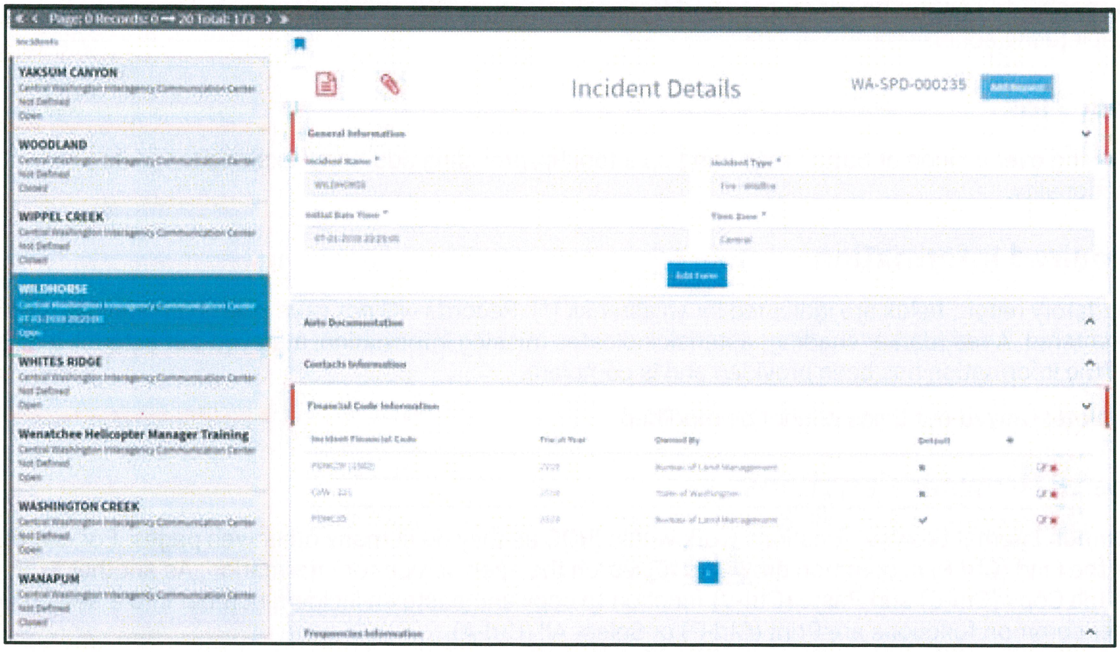
   c Some columns have drop-downs with preset search terms.

6 To open a record so you can view or modify the related information, double-click on any record (any line in the list of records) to open that record in **a**ccordion view.

Working in Accordion View

Accordion view displays a two-pane view with a list of records on the left and related information on the right. **Reminder:** To access accordion view, simply double-click on a record in list view. To return to list view, double-click on a list item on the left side of the screen.

> **Note:** Some of the data in accordion view cannot be modified here, as indicated by the grayed-out fields.



1 Select a record from the list by clicking on it in the left pane. This bring up the related information in the right pane. The blue background in the list on the left indicates that this is the selected incident.

> **Note:** The records list can be navigated quickly using the page selector at the top and bottom of the list.

2 The information on the right is displayed in accordion tabs. Clicking on a header opens or closes the associated tab, allowing you to view or modify the information. In this screenshot, the General Information tab and the Financial Code Information tab are open. The Auto Documentation tab and the Contacts Information tab are closed.

> **Note:** A vertical red bar to the left of the header title indicates that the tab is open. The entire tab is grayed out when it is closed. Similarly, the small arrow on the right of the header bar points up when the tab is closed and down when it is open.
>
> **Tip:** You can add a comment or journal entry to the record by clicking the **Documentation** icon ( ). To attach a file to the record, click the **Attach** icon ( ).

7. Additional Information

System Messages and Alerts

System error and alert messages will appear at the top of the screen in the IROC Banner. Dismiss the messages by clicking the **Close (X)** icon in the right corner of the message.

Some functions will request user confirmation before committing the requested change. Dialog boxes may appear to confirm an action or to undo/cancel an action. Select the appropriate response to complete the action.

Tool Tips

Hovering over an icon or button may bring up a tool tip, providing additional explanation of its functionality.

Required Information

Mandatory record fields are indicated by an asterisk (*). Records will not save unless all required fields are entered. A red (darker shading) asterisk indicates missing information; a grayed-out asterisk indicates that the information has been provided and is complete.

> **Note:** Grayed-out fields cannot be modified.

Useful Browser Functions

Common internet browser functions work within IROC as they do in many other web pages. For example, use the Find (Ctrl-F) in common browsers to search the open screen for information. As another example, use the Copy (Ctrl-C) and Paste (Ctrl-V) function to copy and paste an incident number into a search field. Other common functions are Print (Ctrl-P) or Select All (Ctrl-A).

Basic IROC Training: Student Guide

Creating an Incident in IROC

Contents

1. Objectives

Upon completion of this unit, you will be able to:

- Create an incident directly in IROC.
- Create a preposition incident.
- Change the incident number.
- Add or modify locations, financial codes, and radio frequencies for an incident.

2. Incidents Overview

An **incident** is a human-caused or natural event requiring action or support by emergency service personnel to prevent or minimize loss of life or damage to property and/or natural resources. Accurate, detailed information about the incident must be entered before generating resource requests for wildfires and other all-hazard incidents.

Most incidents are initiated in another system and then imported into IROC.

This guide describes how dispatchers can create a new incident within IROC.

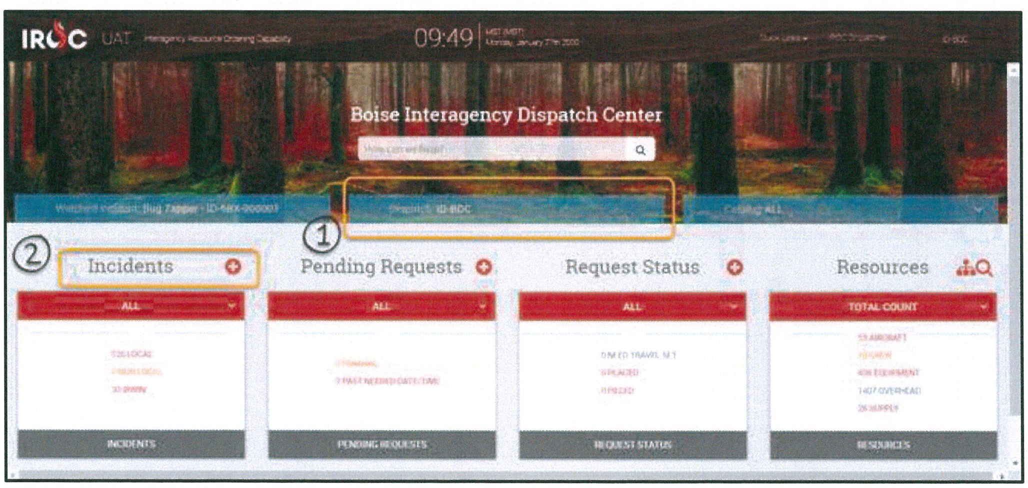
3. Creating an Incident in IROC

Scenario

Nancy is a dispatcher within the Boise Interagency Dispatch Center. A wildfire has been reported, and she needs to create an incident in IROC.

Let's walk through the steps Nancy uses to create the incident.

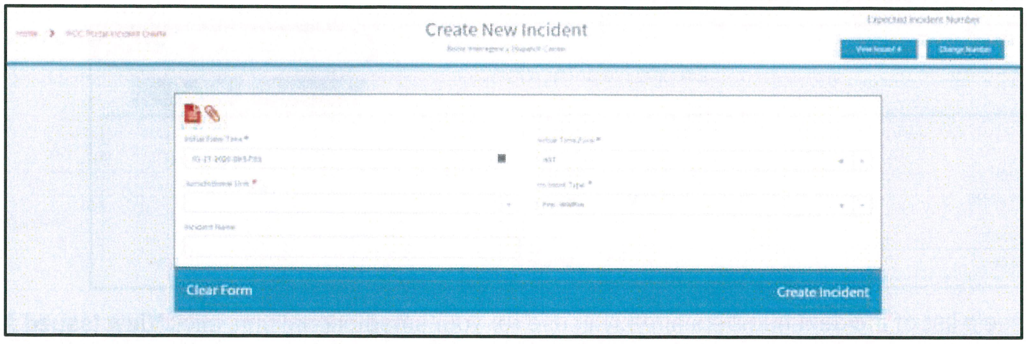
Process



1 Log in to the IROC Portal and select the appropriate dispatch center from the Dispatch Content Selector.

2 Click the **Add** ( ) icon in the Incidents tile.

3 IROC displays the Create New Incident screen.

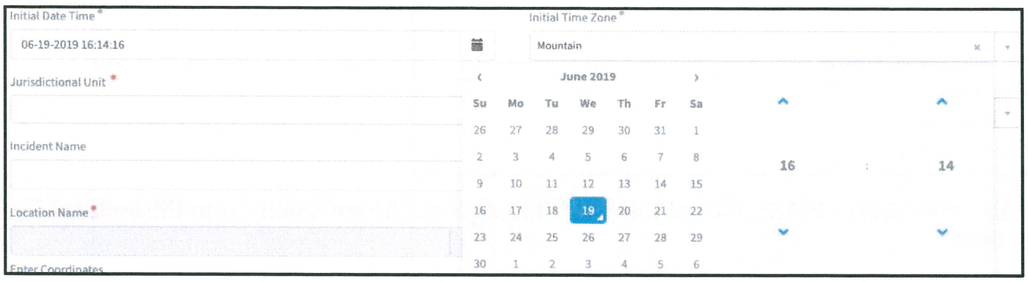


Note: All items marked with an asterisk (*) in IROC are required. A red (darker shading) asterisk indicates missing/required information; once information has been entered, the asterisk is grayed out (lighter shading).

Tip: Unless otherwise noted, you may type directly in each field. For list menus with many options, start typing in the field to perform a type-ahead search.

4 IROC defaults **Initial Date Time*** and **Initial Time Zone*** to the current date, time, and time zone for the dispatch center you are logged into.

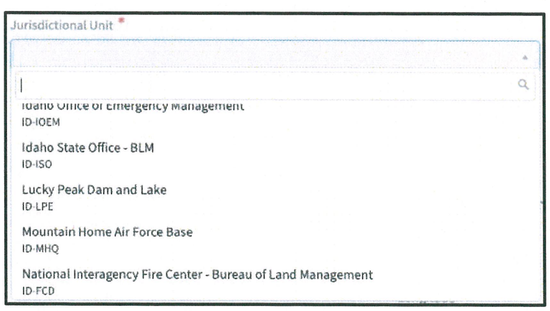
a To change the date or time, click the **Calendar** icon in that field and select the date and time.



Tip: You can also manually enter the date and time in MM-DD-YYYY hh:mm:ss format.

b To change the time zone, select from the **Initial Time Zone*** drop-down.

5 From the **Jurisdictional Unit*** drop-down, select the jurisdictional unit (formerly known as the *incident host unit*). After choosing a jurisdictional unit, additional fields will appear to allow further information to be added.

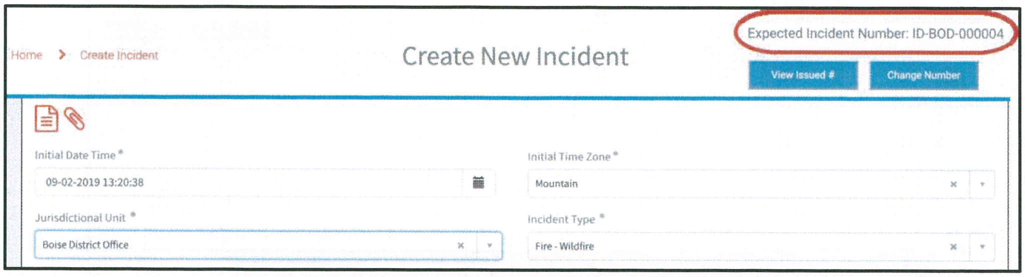


Scenario: Nancy selects "Lucky Peak Dam and Lake" from the **Jurisdictional Unit** drop-down. Only units within Nancy's dispatch center (ID-BDC) are included in the drop-down.

Note: The **Jurisdictional Unit** drop-down contains a list of jurisdictional units for the dispatch center you are logged into.

Tip: To clear a jurisdictional unit from this field, either select a new unit from the list or click the small **x** in the right side of the field and search again.

6 After you select the jurisdictional unit, IROC presents the expected incident number in the upper right corner of the Create New Incident screen.



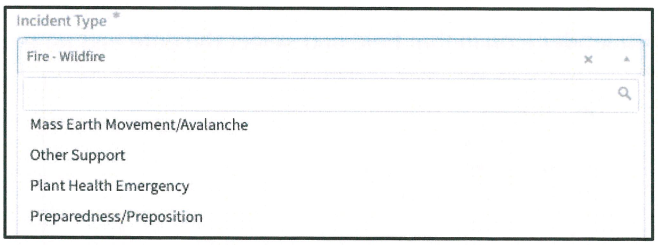
a To see a list of incident numbers already in use for your jurisdictional unit, click **View Issued #.**

b Click **Change Number** to assign a new number to your incident.

Note: Incident numbers in IROC use NWCG standards: State Code + Jurisdictional Unit ID + Sequential Incident Number.

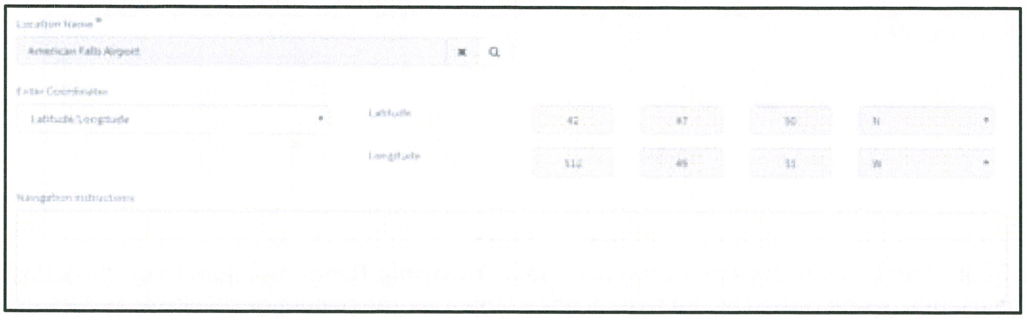
7 The **Incident Name** field and the **Location Name*** field default to the expected incident number. To change the incident name, simply type in the field.

8 IROC defaults **Incident Type*** to "Fire – Wildfire." To change this, select from the drop-down.

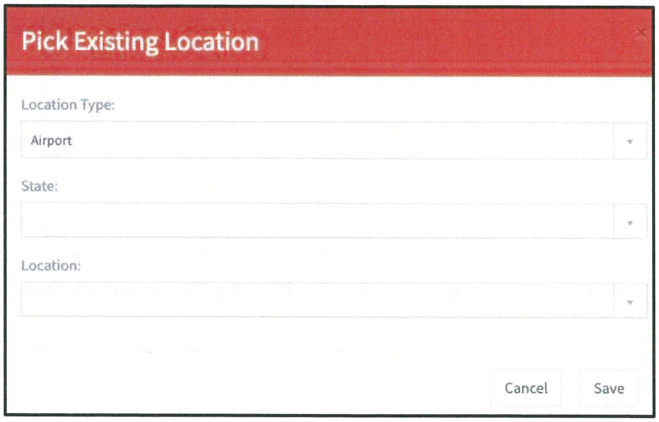


Tip: To create a preposition incident, select "Preparedness/Preposition" from the **Incident Type*** drop-down.

Incident Location



1 To select an existing location, click the **Search** icon in the **Location Name*** field to open the Pick Existing Location screen.



a Select a **Location Type** and a **State** from the drop-down menus; this narrows down the items in the **Location** menu. Location types are airports, organizations, or other locations.

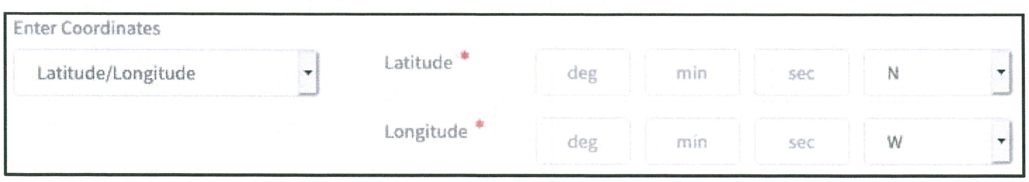
b The bottom field will change depending on the chosen location type. Select the location from the drop-down menu or enter text to perform a type-ahead search.

c When done, click **Save**. The coordinates will automatically populate.

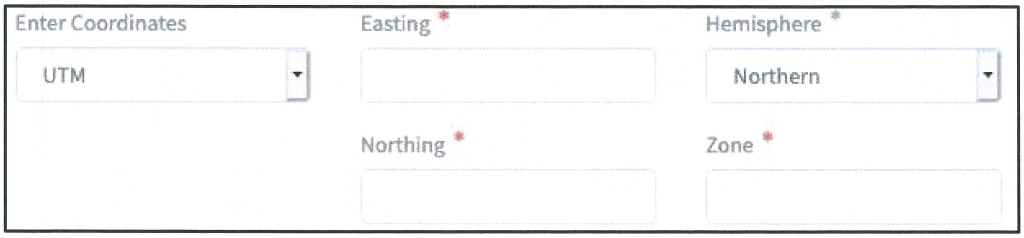
2 To set a new location for the incident, select the location coordinates type from the **Enter Coordinates*** drop-down; then enter the coordinates for the incident's point of origin.

Note: Valid coordinate types are latitude/longitude, UTM (Universal Transverse Mercator), and TRS (Township-Range-Section). IROC defaults to the Latitude/Longitude option.

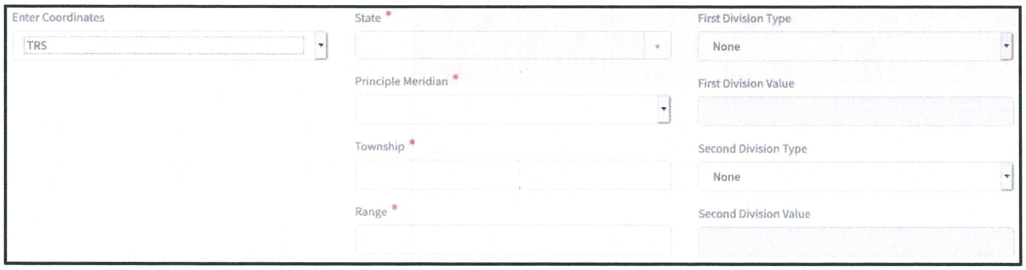
a **Latitude/Longitude** coordinates in IROC are entered in the degrees, minutes, seconds format. For example, the lat/long coordinates for Mt. Rushmore are 43° 52' 49" N, 103° 27' 32" W.



b **UTM (Universal Transverse Mercator)** is similar to the lat/long system, except it divides the earth into 60 zones. A UTM coordinate comprises an easting value (how far east you are), a northing value (how far north you are), a zone number, and hemisphere (N/S). The UTM coordinates for Mt. Rushmore are zone 13T, easting 623,794.15, northing 4,859,599.16, northern hemisphere.



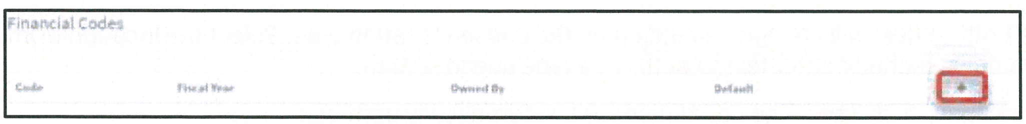
c The Public Land Survey System (PLSS) uses **TRS (Township-Range-Section)** to divide public domain lands (lands owned by the federal government for the benefit of US citizens). TRS uses three levels of location details: principle meridian, township, and range. The location may be further refined by using subdivisions (division type/value).



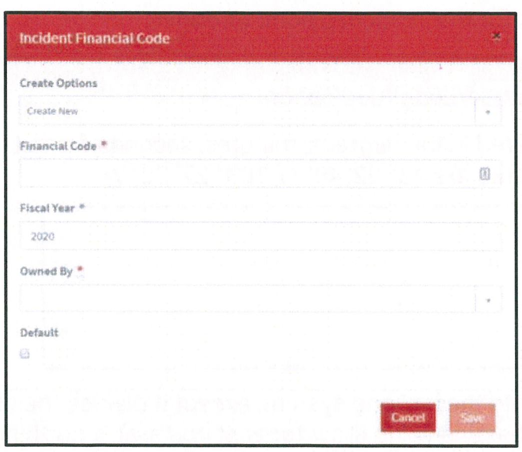
3 Enter navigation instructions, if needed, by entering text directly into the **Navigation Instructions** field in the Create New Incident screen.

Incident Financial Codes

1 To add a financial code associated with this incident, click the **Add** (**+**) icon in the Financial Code list to open the Incident Financial Code screen.



2 To create a new financial code for an incident, choose the **Create New** option.



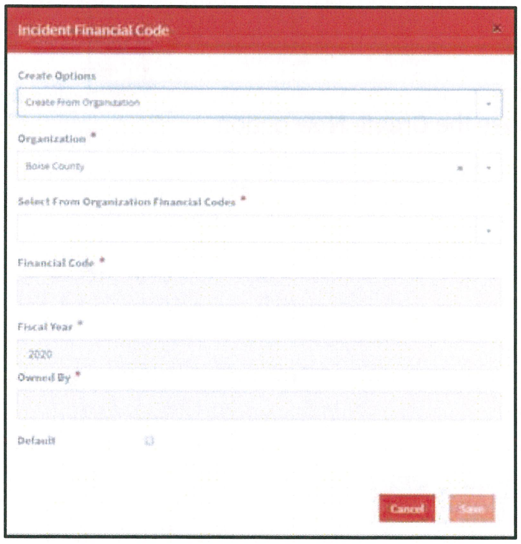
a Enter the **Financial Code***.

b Select the **Fiscal Year*** (IROC defaults to current fiscal year) and **Owned By*** information from the drop-down menus.

c Click the **Default** checkbox if appropriate. Only one financial code may be set as the default.

d When done, click **Save**.

3 To select an existing financial code, choose **Create From Organization** from the **Create Options** drop-down.



a Select an organization from the **Select From Organization Financial Codes** drop-down.

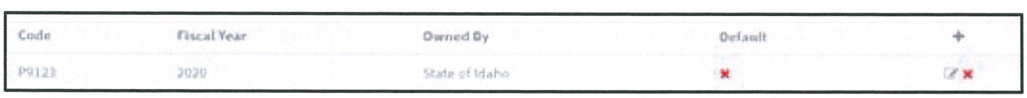
b Select a financial code from the **Select From Organization Financial Codes** drop-down. IROC will populate the **Financial Code*, Fiscal Year*,** and **Owned By*** fields with the relevant information.

Note: The codes in the **Select From Organization Financial Codes** drop-down are associated with the incident's jurisdictional unit.

c Click the **Default** checkbox to make this financial code the default for this incident. Only one financial code may be set as the default.

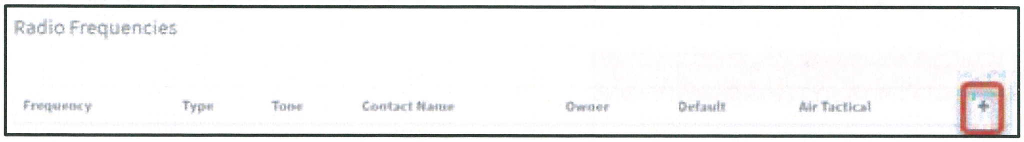
d When done, click **Save**.

4 To edit an existing financial code, click the **Edit** icon in the Financial Codes list. To delete an existing financial code, click the **x** icon.

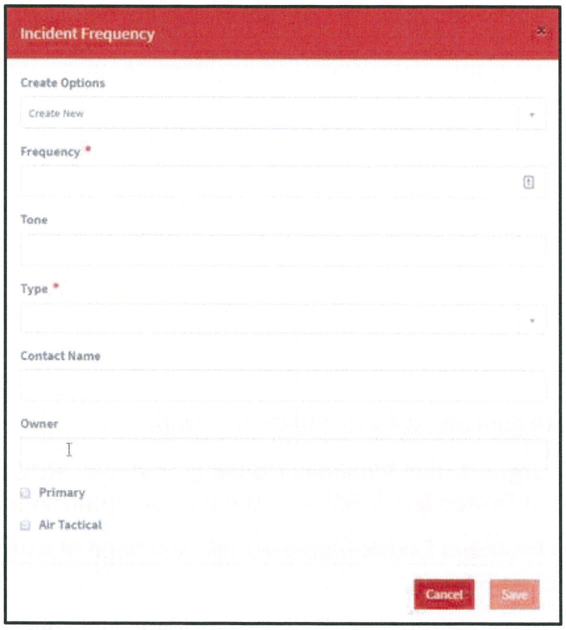


Incident Frequencies

1 To add a radio frequency to this incident, click the **Add** (**+**) icon in the Radio Frequency list to open the Incident Frequency screen.



2 To create a new radio frequency for an incident, choose the **Create New** option.



a Fill in in the relevant details, including **Frequency*** and **Type***.

b If necessary, indicate whether this frequency is **Primary** or **Air Tactical** by clicking in the appropriate checkbox.

c When done, click **Save**.

Note: A list of frequencies associated with the incident's jurisdictional unit will populate the Radio Frequency list.

3 To select an existing radio frequency, choose **Create From Organization** from the **Create Options** drop-down.

a Select an organization from the **Select From Organization Frequency** drop-down and fill in the relevant information.

b If necessary, indicate whether this frequency is **Primary** or **Air Tactical** by clicking in the appropriate checkbox.

c When done, click **Save**.

4 To edit an existing frequency, click the **Edit** icon in the Radio Frequency list. To delete an existing frequency, click the **Delete** icon.

5 After entering all relevant details for this incident, click **Create Incident** at the bottom of the **Create New Incident** screen.

Tip: To clear all entered information and start again, click **Clear Form**.

Basic IROC Training: Student Guide

8. Maintaining Incidents

Contents

1. Objectives

Upon completion of this unit, you will be able to:

- Filter, search for, and select incidents.
- Take action on multiple incidents in list view.
- View or modify incident details in accordion view.

2. Incidents Overview

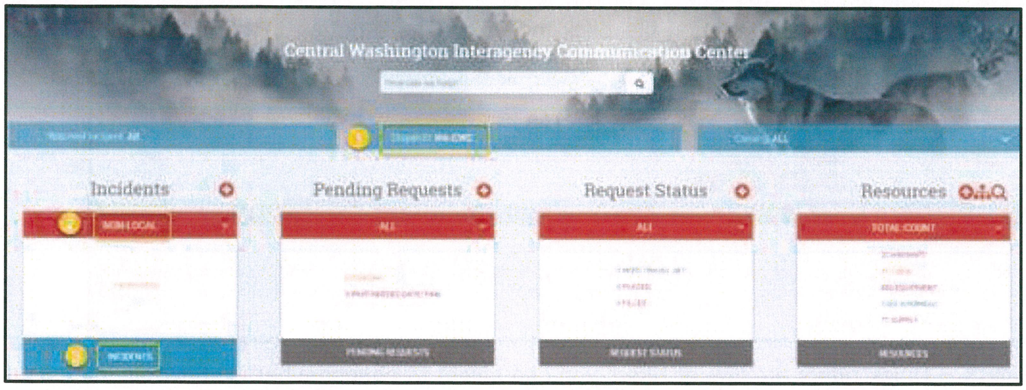
An **incident** is a human-caused or natural event requiring action or support by emergency service personnel to prevent or minimize loss of life or damage to property and/or natural resources. Accurate, detailed information about the incident must be entered before generating resource requests for wildfires and other all-hazard incidents.

Most incidents are initiated in another system and then imported into IROC. Wildfire type incidents come into IROC automatically. For other types of incidents, such as hazards or public assists, that will need resource requests, you can access the Staging Incidents work area to add them to IROC.

This guide describes how dispatchers can view and modify an existing incident within IROC and how to add an incident to IROC from outside CAD systems such as IRWIN.

> **Note:** All items marked with an asterisk (*) in IROC are required.
>
> **Tip:** Unless otherwise noted, you can type directly in each field. When you type in a drop-down menu search field, IROC will perform a type-ahead search to narrow down the choices in the list.

3. Accessing the Incidents Work Area



1 In IROC Portal, select the appropriate dispatch center from the **Dispatch** content selector.

2 You may choose one of the following filters from the red list selector at the top of the tile. This will change what is shown in both the action tile and the Incidents work area

a **All** – Displays all incidents for your chosen dispatch center.

b **Local** – Displays incidents local to the selected dispatch center.

Note: A dispatcher can only modify incidents local to their organization

c **Non-Local** – Displays incidents outside the selected dispatch center, as shown in the screenshot.

d **IRWIN** – Displays incidents received from outside CAD systems via IRWIN. Choosing this filter opens the Staging Incidents work area, where you can choose to add an incident to IROC.

3 Click the Incidents bar at the bottom of the Incidents action tile to open the work area on the bottom half of your screen. The filter you choose in the list selector will determine whether you open the Incidents work area or the Staging Incidents work area.

4. Incidents Work Area

There are two views in the work area. When you click the Incidents bar, the work area opens in list view. This is where you can view incidents, filter and search the list, and take certain actions on incidents. To see the details for a specific incident, double-click on it to move to accordion view (see Accordion View for more information).

List View

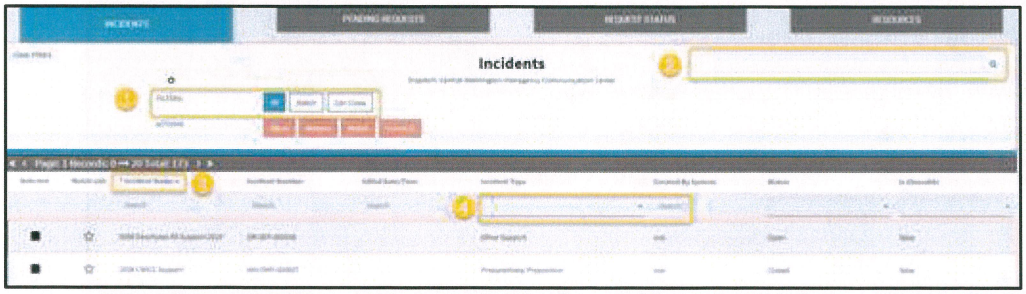
The list view of the Incidents work area provides a searchable list of all incidents within your selected dispatch center. In this view, you can quickly search for and select one or more incidents and take the following actions on them:

- Quickly filter and search incidents and select one to view in accordion view.
- Move one or more incidents from another system into IROC.
- Close or open several incidents at once.
- Add or remove items to/from your Watch List.

Note: When you filter a list of incidents in list view, this filter will be applied to the information shown in the left pane of accordion view. Return to list view to clear filters if you don't find the incident you desire in accordion view.

Navigating in List View

To navigate the items in list view, use filters, column sorting, or search fields. To remove filters that you applied using the List Selector in the action tile, click the **Clear Filters** button in the top left.



1 **Quick Filters** – Quick filters are preset filters you can select to change what is shown in the list. Depending on the List Selector chosen, you will see one of two screens in the work area—Incidents or Staging Incidents.

   a **Incidents** – If you selected All, Local, or Non-Local from the list selector, you can choose one of the following preset filters.

   - **All** – Displays all incidents.
   - **Watch** – Displays only those incidents on your Watch List.
   - **Can Close** – Displays only those incidents in a "Can Be Closed" state.

   b **Staging Incidents**– If you selected IRWIN from the list selector, you will see a list of all staging incidents, with the following preset filters.

   - **Fire** – Displays only fire-related incidents.
   - **Non Fire** – Displays only non-fire related incidents.
   - **System: All** – Displays incidents recorded in all CAD systems.
   - **System: Wildcad** – Displays only incidents recorded in Wildcad.
   - **System: Altaris** – Displays only incidents recorded in Altaris.

2 **Search Field** – Filter the list by typing search criteria in the field at the top right of the screen.

   a Type search criteria in the field and press **Enter**.

   b To remove this search, delete the contents of the search field and press **Enter**.

Note: Refer to the Wildcard Searches quick reference card for tips on different search criteria.

3 **Column Sort** – Click a column heading (e.g., Watch List, Incident Number) to sort the list by that column, in either ascending or descending order.

Tip: All column heads except Selected and Watch List can be clicked to sort.

4 **Column Search** – Enter search criteria in the search boxes beneath the column headings.

   a Type search criteria in the box and press **Enter**.

   b To remove search criteria, delete the text and press **Enter**.

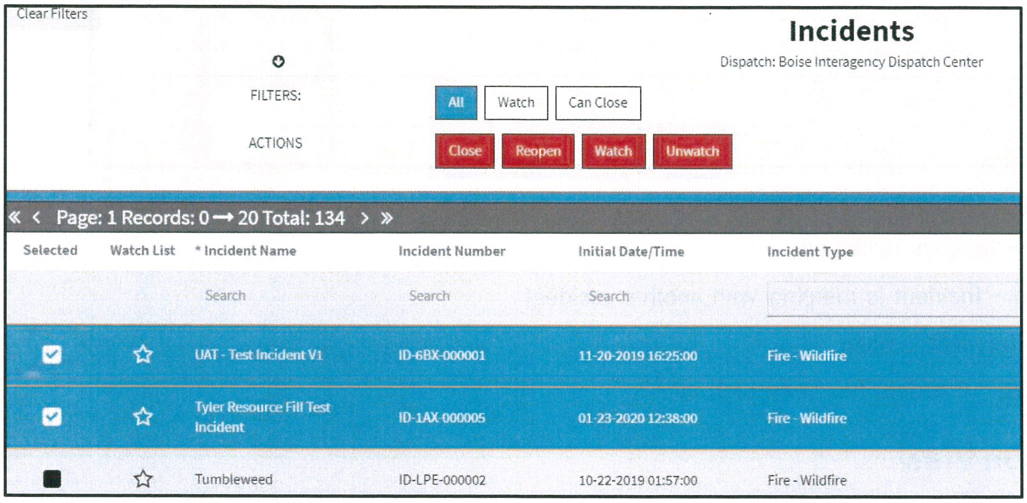
Tip: You can enter or remove text in more than one field before pressing **Enter**.

   c For some columns, choose from the drop-down list for available search terms.

5 To clear list selector filters, click the **Clear Filters** button at the top left of the work area.

Taking Action in List View

As with the filters, the action buttons available will change depending on whether you are in the Incidents or Staging Incidents work area.



1 To perform actions on multiple incidents at once, click the checkbox in the Selected column to choose one or more incidents and then one of the action buttons. Depending on the List Selector chosen, you will see one of two screens in the work area—Incidents or Staging Incidents

  a **Incidents** – If you selected All, Local, or Non-Local from the list selector, you can choose one of the following action buttons.

  - **Close** – Closes incidents.
  - **Reopen** – Reopens incidents.
  - **Watch** – Adds incidents to your Watch List.
  - **Unwatch** – Removes incidents from your Watch List.

  b **Staging Incidents**– If you selected IRWIN from the list selector, you will see a list of all staging incidents, with the following action button.

  - **Add to IROC (IRWIN)** – Adds incidents imported by IRWIN to the IROC system.

2 Click the star in the Watch List column to add an incident to or remove it from your Watch List. Yellow stars indicate items on your list.

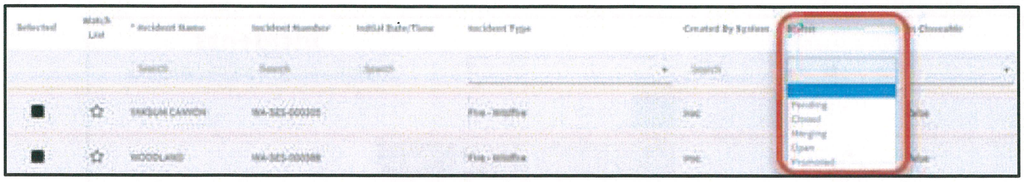
> **Tip:** You can also click anywhere inside a row to select that incident; then click the desired action button to apply the action to it.
>
> **Note:** If you click again on a row that has already been selected, you will be taken to the accordion view.

Example: Dispatcher Nancy wants to close several incidents.

- In list view, she uses quick filters or the column head search fields to quickly find specific incidents.
- She clicks the checkboxes in the Selected column to choose the relevant incidents.
- She clicks the **Close** action button to close those incidents.
- If she closes one in error, she can follow the same procedure and click the **Reopen** action button.

Viewing Incident Status

Incident status is displayed in the Status column in list view. This screenshot shows the column search drop-down expanded.



- **Pending** – Incident is pending action.
- **Closed** – Incident is closed.
- **Merging** – Incident is merging with another incident.
- **Open** – Incident is open.
- **Promoted** – Incident has been promoted.

Accordion View

To get to accordion view, double-click on a record in list view. To return to list view from accordion view, double-click on a record in the list in the left pane.

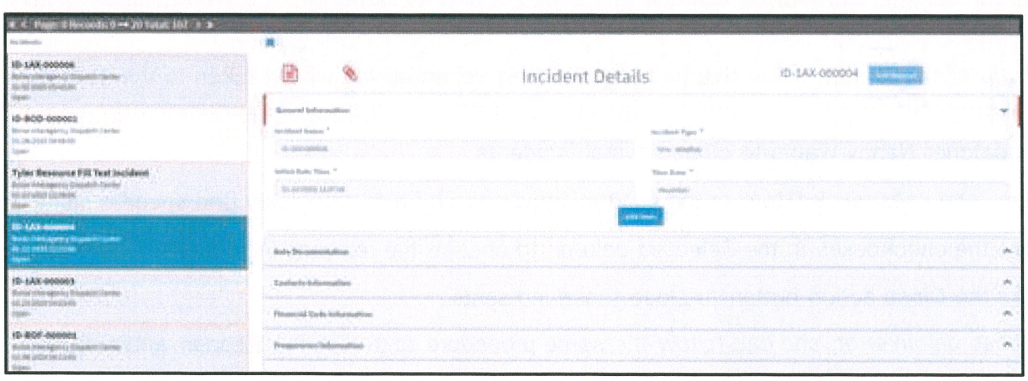
Accordion view presents a two-pane screen with a list of records on the left and related information organized into tab sections on the right. As with list view, you will see the Staging Incidents accordion view if you selected IRWIN from the list selector.

> **Note:** If a record is already selected in a list (i.e., it has a blue background), clicking once on that record will move you back to list view.

Clicking once on an incident in the list on the left brings up the accordion pane on the right. Clicking on a desired tab in the accordion expands or closes the section so you can view or modify incident details. For example, you can:

- Add or modify location information for the incident.
- Add or modify radio frequencies for the incident.
- Split a request block.
- Add a contact to an incident.

Navigating in Accordion View



1 Select a record from the list on the left by clicking on it. This brings up the related information in the right pane.

> **Note:** The records list can be navigated quickly using the page navigator arrows at the top and bottom of the list. Clicking a single arrow moves you forward or backward by one page; clicking the double arrows moves you to the beginning or end of the list.

2 The information on the right is displayed in accordion tabs. Clicking on a tab header opens or closes the associated tab, allowing you to view or modify the information.

> **Note:** A vertical red bar to the left of the header title indicates that the tab is open. The entire tab is grayed out when it is not open. Similarly, the small arrow on the right of the header bar points up when the tab is closed and down when it is open.

3 Throughout accordion view, you will find useful icons and action buttons.

a **Documentation icon** ( ) – Add documentation / journal entries to the record.

b **Attach icon** ( ) – Attach files to the record.

c **Add Request action button** – Add resource requests to the incident record.

d **Edit Form action button** – Click to edit fields on the portion of the form. Some forms are locked until the **Edit Form** button is clicked.

e **Menu icon** ( ) – Some tables within tabs have menus. Click on the **Menu** icon to export data.

Each accordion tab will show information in a form, a list, a table, or some combination. The remainder of this guide covers the details available in each accordion tab.

Examples of Using List View and Accordion View

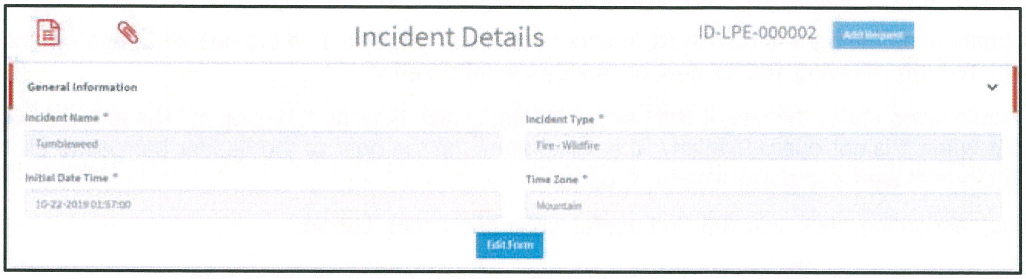
Nancy is a dispatcher within the Boise Interagency Dispatch Center. In her daily tasks, she uses both list view and accordion view to maintain incident records.

If Nancy wants to ...	She should ...
Review incidents created in IRWIN and import them to IROC.	Choose IRWIN from the selector bar to view the Staging Incidents *list view*. Here she can check the appropriate incidents in the Selected column and click the **Add to IROC** action button.
Add several incidents to her Watch List.	Click in the Selected column in *list view* to choose records and click the **Watch** action button.
Edit information related to an incident.	Double-click a record in *list view* to move to *accordion view*, where she can view and edit the necessary fields in the accordion tabs on the right.
View and edit request blocks for an incident.	Double-click a record in list view to move to *accordion view*. She can modify information in the **Request Blocks** tab on the right.
Search incidents and choose one to view and edit	Apply filters and search terms in *list view* to find a specific incident and then double-click on it to view and edit details in *accordion view*.

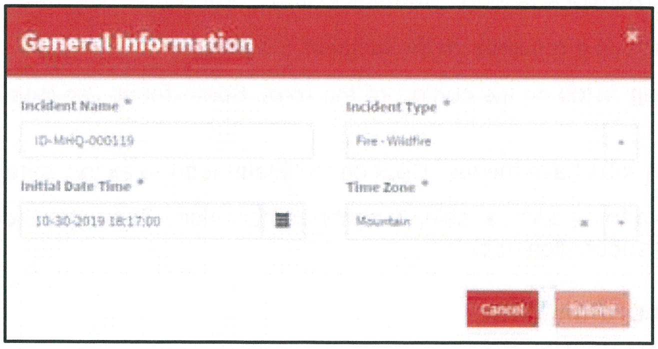
General Information Tab

Example: On this tab, Nancy can make necessary changes to general information related to the incident.

Note: If you are in the Staging Incidents accordion view for IRWIN incidents, this is the only tab that will appear. The information in it cannot be modified; it is view only.



1 To modify information on this form, click **Edit Form** to open the General Information screen.

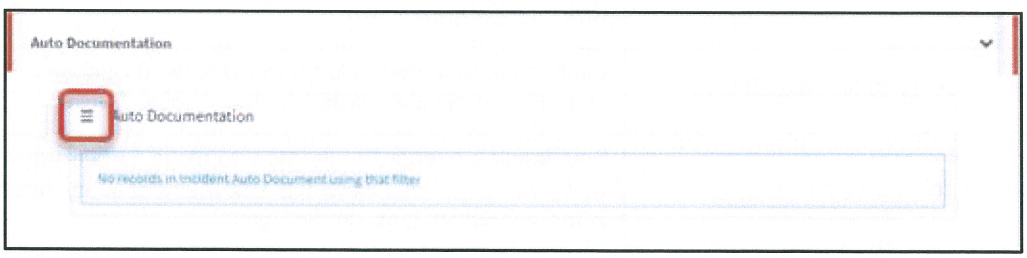


2 In the General Information screen, you can modify any of the required fields; then click **Submit.**

Note: To change to a preposition incident, select "Preparedness/Preposition" from **Incident Type**.

Auto Documentation Tab

Example: On this tab, Nancy can view the Auto Documentation log to determine what other actions have been taken on this incident.



1 Click the **Menu** icon to the left of the table head to export the log as a PDF, CSV, or Microsoft Excel document.

2 Although not shown here, you can use the column header sort and right-click filters to sort the list.

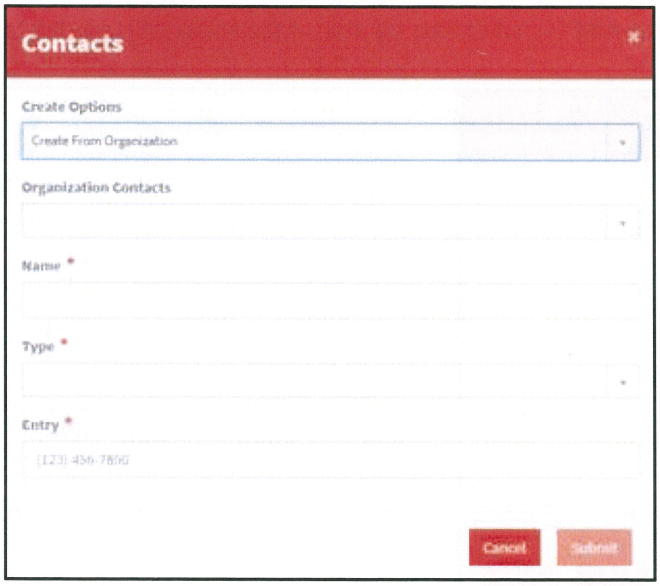
a Click a column head to sort the information in the table according to that column in ascending or descending order.

b Right-click on a table cell that you want to use as a filter and select "Show Matching." This will show all items with the same information. To exclude an item from the list, right-click and select "Filter Out."

Contacts Information Tab

Example: Dispatcher Nancy could use the Contacts Information tab to view, add, or modify contacts associated with an incident.

1 To add a contact to the list, click the **Add** (+) icon to open the Add Contact screen.



a **To Create a New Contact** – Under **Create Options**, the default is **Create New**. With this selected, simply fill in **Name***, **Type***, and **Entry*** (such as phone number). When done, click **Submit**.

b **To Add a Contact from an Organization** – Select **Create From Organization** (shown here) under **Create Options**. Choose from the **Organization Contacts** drop-down. IROC will automatically populate the rest of the fields. When done, click **Submit**.

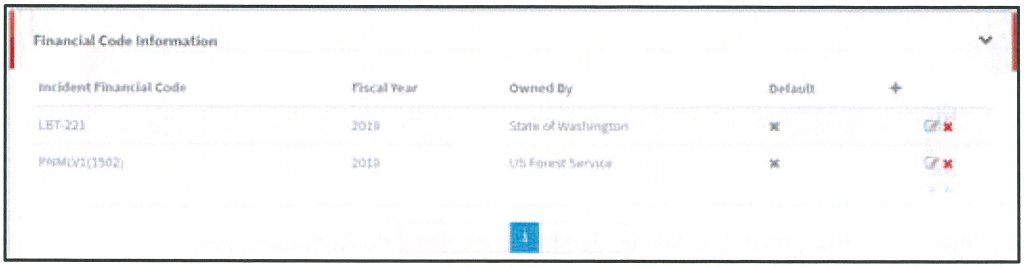
2 To edit an existing contact, click the **Edit** icon in that row of the Contacts Information list, make changes, and then click **Submit**.

3 To remove an existing contact from the incident, click the **Delete** icon in that row and click **OK**.

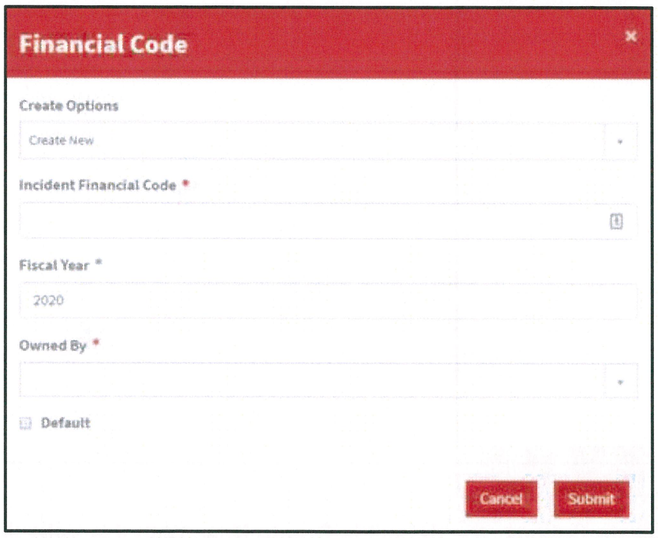
Tip: For long lists, use the navigation buttons to move forward or backward through the list.

Financial Code Information Tab

This tab contains a list that shows all financial codes for an incident.



1 To add an incident financial code, click the **Add** (**+**) icon in the top row of the Financial Code list to open the Incident Financial Code screen.



- a **To create a new financial code** – Under **Create Options**, the default is **Create New** (shown here). With this selected, enter the **Financial Code***, **Fiscal Year*** (defaults to the current fiscal year), and **Owned By*** information.
- b **To select an existing financial code** – Click the **Create Options** drop-down and select **Create From Organization.** Choose an **Organization** and **Organization Financial Code** from the drop-down. IROC will populate the remaining fields with the correct information.
- c Select **Default** to mark this as the default financial code for this incident.

Note: Only one financial code may be marked as default.

- d When done, click **Submit**.

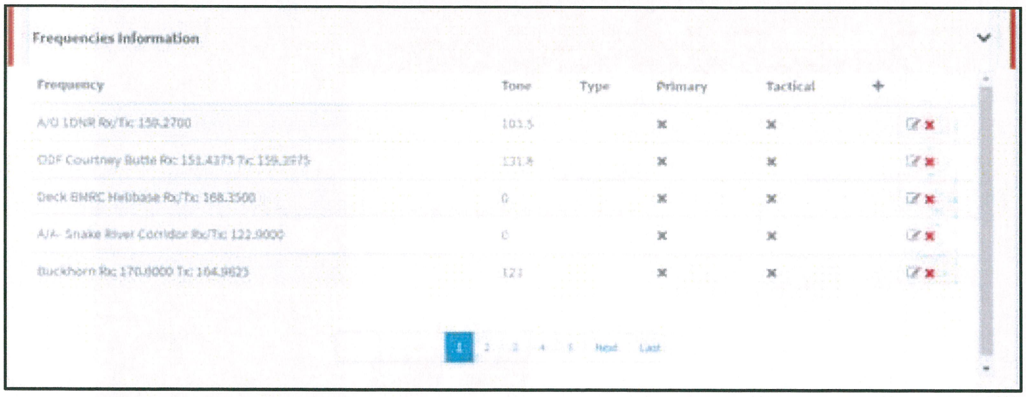
2 To edit an existing financial code, click the **Edit** icon in that row of the Incident Financial Code list, make changes, and click **Submit**.

3 To remove an existing financial code from the incident, click the **Delete** icon in that row and click **OK**.

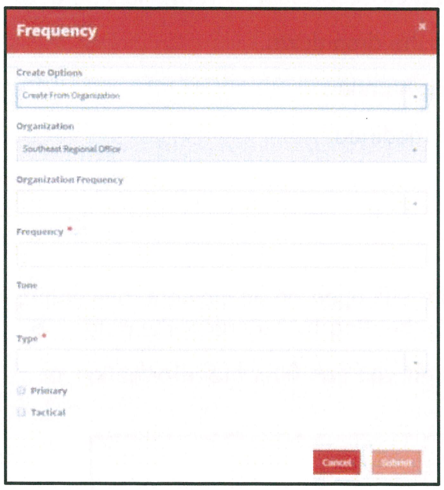
Tip: For long lists, use the navigation buttons to move forward or backward through the list.

Frequencies Information Tab

Example: Nancy uses this screen to view and update radio frequencies for the incident. She can add a variety of frequencies, including ground, air, law enforcement, or other uses.



1 To add a frequency, click the **Add** (+) icon to open the Frequency screen.



a **To Create a New Frequency** – Under **Create Options**, the default is **Create From New.** With this selected, enter the relevant information, including the require **Frequency** and **Type**. You may also indicate whether this is primary or tactical by checking the appropriate box.

b **To Create From Organization** – Click the **Create Options** drop-down and select **Create From Organization**. Choose from the **Organization Frequency** drop-down. IROC will automatically populate the remaining fields. When done, click **Submit**.

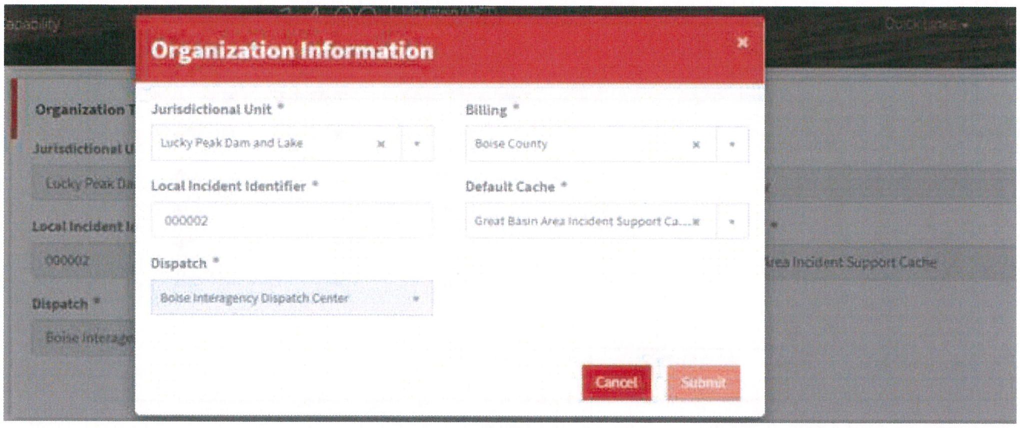
2 To edit an existing frequency, click the **Edit** icon in that row of the Frequency list, make changes, and click **Submit**.

3 To remove an existing frequency from the incident, click the **Delete** icon in that row and click **OK**.

Tip: For long lists, use the navigation buttons to move forward or backward through the list.

Organization Tab

This tab contains a form showing the incident organization information, such as jurisdictional unit, billing organization, and default cache.



1 To modify information on this form, click **Edit Form** to open the Organization Information screen.

2 You can modify each field by entering text or choosing from the drop-down.

Note: Changing the jurisdictional unit will update the incident number.

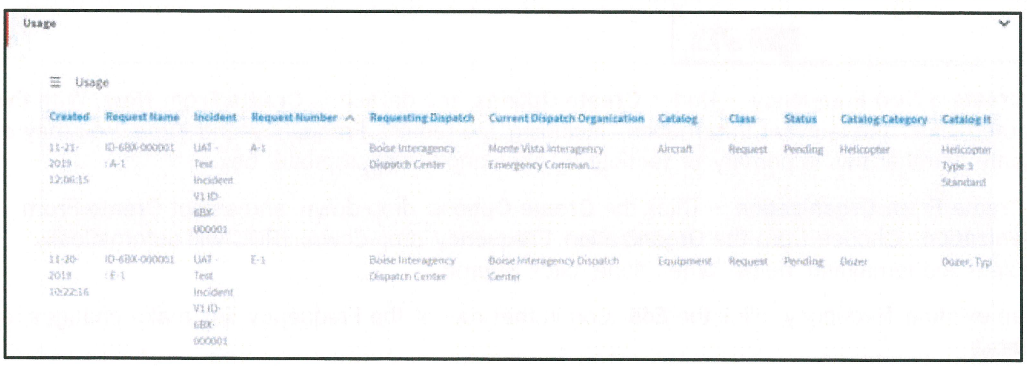
3 The assigned **Dispatch** center is display only and cannot be modified.

4 When done, click **Submit**.

Usage Tab

Example: On this tab, Nancy can view a table of requests that are still open on an incident, preventing the incident from being closed. Nancy can create a quick report for a briefing by exporting the data.

Note: The information in this table cannot be modified, though you can filter the information or download it to a report.



1 Click the **Menu** icon to export the information as a PDF, CSV, or Microsoft Excel document.

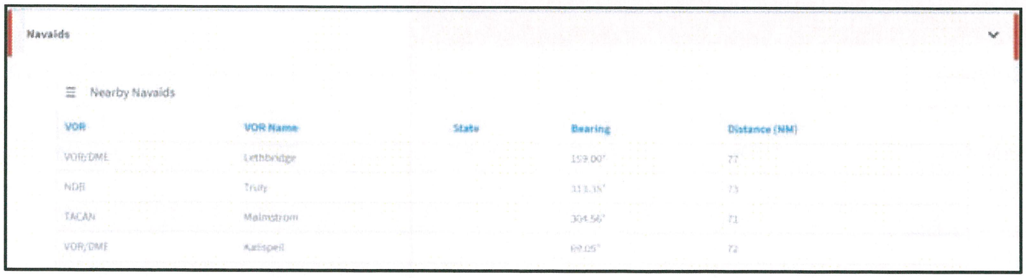
2 You have two options for filtering how you view the information in this table.

a Click a column head to sort the information in the table according to that column in ascending or descending order.

b Right-click on a table cell that you want to use as a filter and select "Show Matching." This will show all items with the same information. To exclude an item from the list, right-click and select "Filter Out."

NavAids Tab

Example: On this tab, Nancy can view or export a table of all nearby navigation aids. She cannot modify the information in this table, though she can choose to download it or filter the list.



1 Click the **Menu** icon to export the information as a PDF, CSV, or Microsoft Excel document.

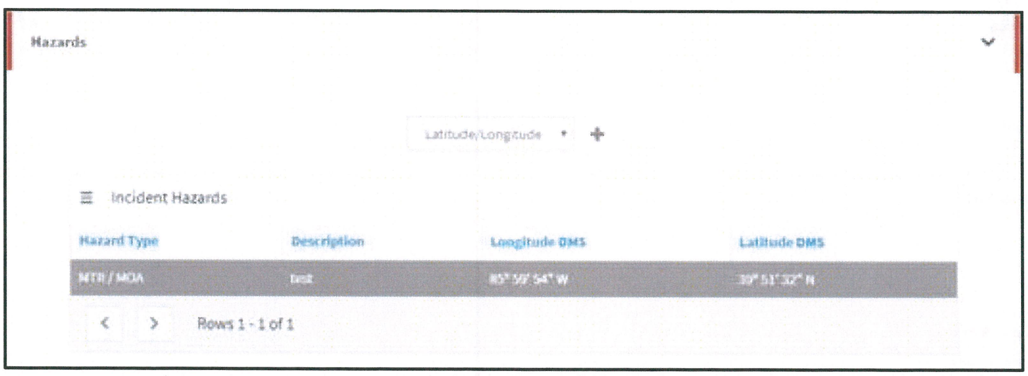
2 You have two options for filtering how you view the information in this table.

  a Click a column head to sort the information in the table according to that column in ascending or descending order.

  b Right-click on a table cell that you want to use as a filter and select "Show Matching." This will show all items with the same information. To exclude an item from the list, right-click and select "Filter Out."

Hazards Tab

Example: On this tab, Nancy can see a table of all hazards associated with the incident. She can also add hazards, such as a communication tower that poses a danger to flight operations in the area of the incident or a report of migratory birds.



1 Click the **Menu** icon to export the information as a PDF, CSV, or Microsoft Excel document.

2 You have two options for filtering how you view the information in this table.

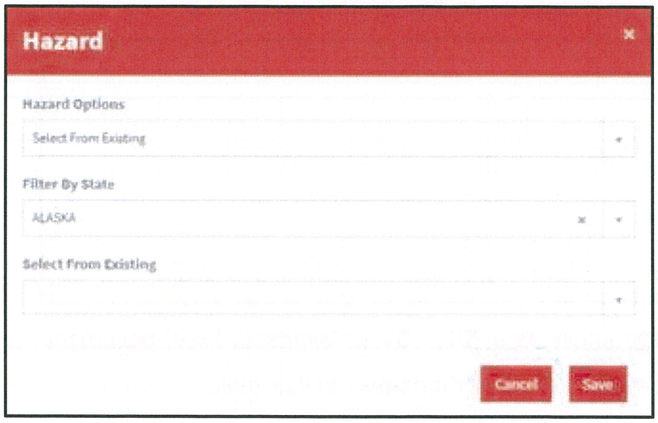
  a Click a column head to sort the information in the table according to that column in ascending or descending order.

  b Right-click on a table cell and select "Show Matching." This will show all items with the same information. To exclude an item from the list, right-click and select "Filter Out."

> **Tip:** Choose your preferred coordinates from the drop-down to change the information shown in the table. The default is to show Latitude/Longitude.

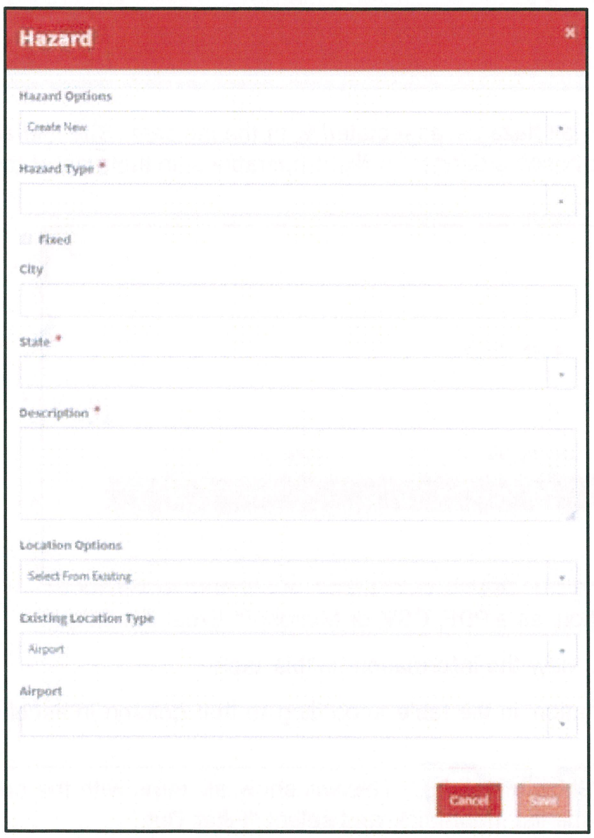
3 To add a new hazard to an incident, click the **Add (+)** icon beside the **Latitude/Longitude** drop-down to open the Hazard screen.

a **To Add an Existing Hazard** – Under **Hazard Options**, the default is **Select From Existing.** With this selected, choose a state to filter the list shown in the **Select From Existing** drop-down. Choose the hazard from the **Select From Existing** drop-down and click **Save**.



Note: Location details will automatically populate in the Hazards tab.

b **To Add a New Hazard** – From **Hazard Options**, choose **Create New**. Enter the relevant information, including **Hazard Type*, State*** and **Description***.



Note: If you select a fixed hazard type from the drop-down, the **Fixed** checkbox will automatically be checked.

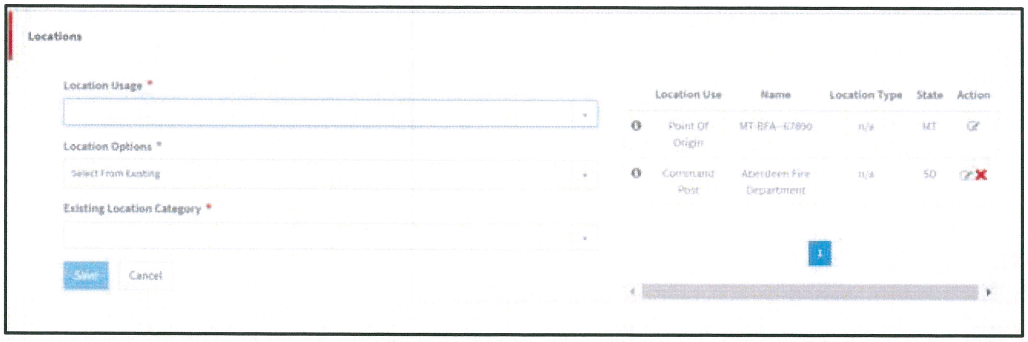
- To select an existing location, choose **Select From Existing** from the **Location Options** drop-down, choose the **Location Type** (airport, organization, or other), and then choose the appropriate location from the drop-down (the content in this drop-down changes based on the location type).

- To create a new location, choose **Create New** from **Location Options**, enter the **Location Name***, and the coordinates (the default is to enter coordinates in Latitude/Longitude format).

4 To edit or remove an existing hazard, click once on the hazard in the table to open the Hazard screen. Either edit the information and click **Save**, or click **Delete** and then **OK** to remove the hazard from the incident.

Locations Tab

Example: On this tab, Nancy can see a list of all locations associated with an incident, including the point of origin. Nancy can use the form on the left to document the location for resource delivery. It may be an airport, a rally point, or a temporary helipad. She can also document a reload base or command post.

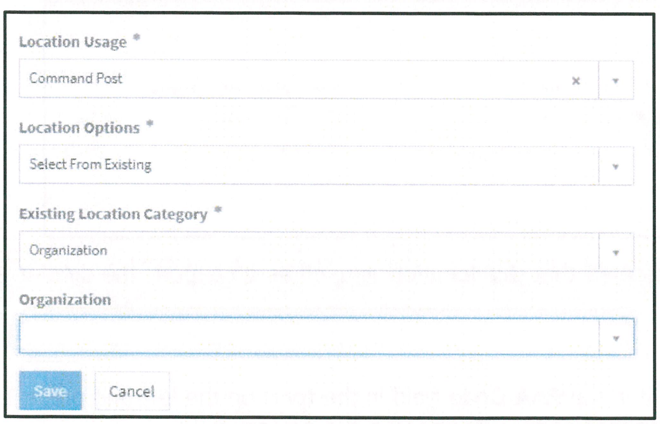


1 To add a location, choose from the drop-down menus.

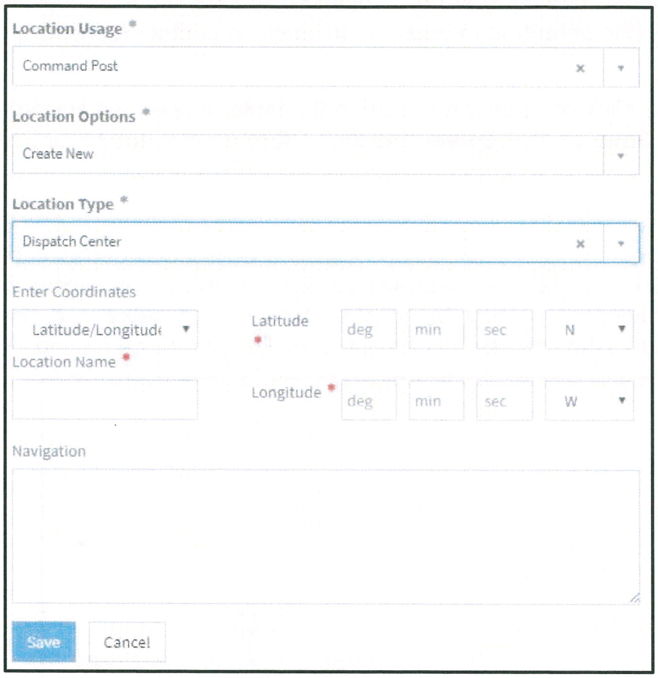
a **Location Usage** – Choose how the location is to be used in this incident (e.g., base camp, drop point, etc.).

b **Location Options** – From the Location Options drop-down, choose whether to create a new location or select an existing location.

- For **Select From Existing**, choose the **Location Category** (airport, organization, or other) and then select the appropriate item from the bottom drop-down that appears. Location data will automatically populate. Enter **Navigation Instructions** in the field that appears and click **Save** to add the location to the list on the right.



- For **Create New** (not shown above), choose the **Location Type** and enter **Coordinates***, **Location Name***, and **Navigation instructions** (if needed). Click **Save** to add the location to the list on the right.



2 Click the **Edit** icon in the **Locations** list on the right to edit an existing location. The information will appear in the form on the left. When done, click Save.

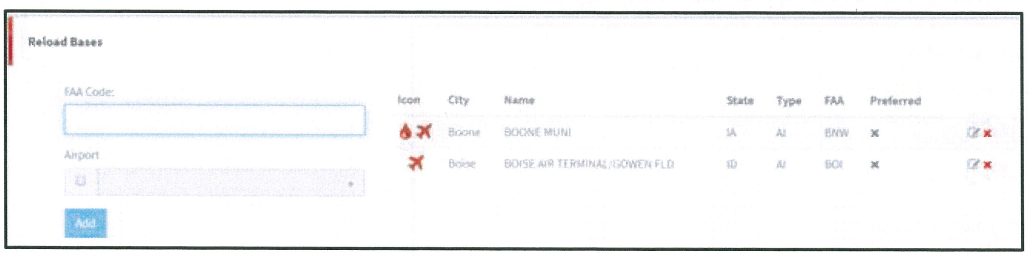
Note: You cannot change the location name for the point of origin.

3 Click the **Delete** icon to remove a location from the incident.

Note: You cannot delete the point of origin.

Reload Bases Tab

Scenario: On this tab, Nancy can view, add, or modify airports and reload bases associated with an incident.



Note: In the list, the airplane icon indicates that this location is used as an airport; the droplet icon indicates that it is a reload base.

1 To add an airport to an incident:

a If you know the FAA code, enter it in the **FAA Code** field in the form on the left and press **Tab** or **Enter**. The airport associated with that code will appear in the **Airport** field.

b If you don't know the FAA code, click the checkbox in the **Airport** field and choose from the drop-down.

2 Click to indicate whether it is a preferred airport, used as an airport, and/or used as a reload base for the incident.

Note: Only one airport may be marked as the preferred airport for an incident.

3 Enter **Navigation Instructions** as needed. If a Reload Base, enter navigation instructions for the reload base.

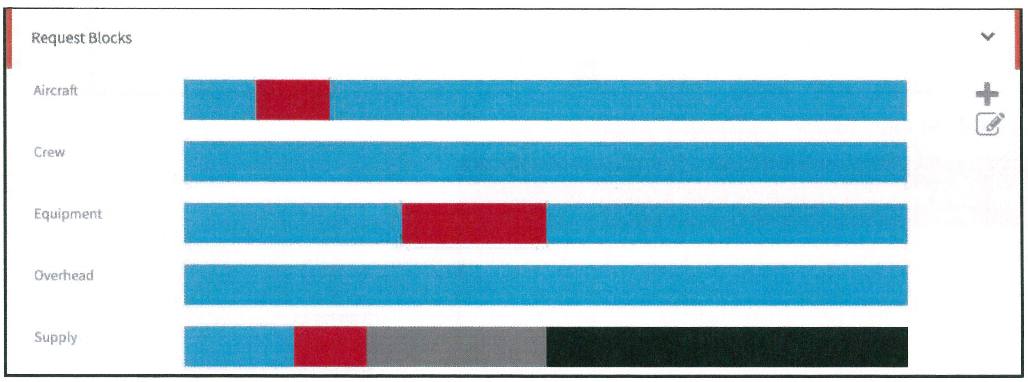
4 When done, click **Add** to add the base to the list on the right.

5 To edit a base, click the **Edit** icon in the list on the right, make changes in the form on the left, and click **Save.**

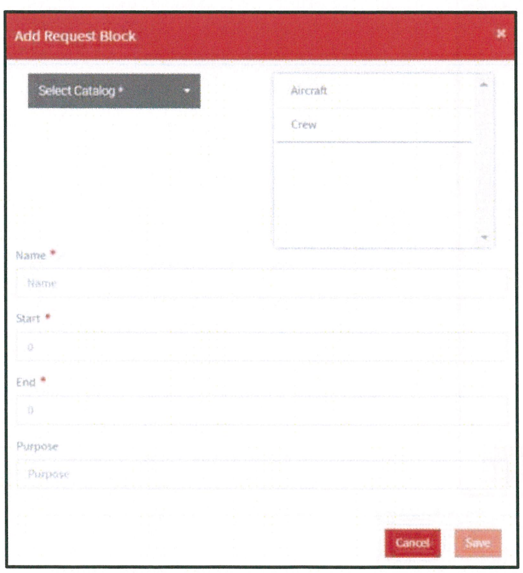
6 To remove a base, click the **Delete** icon in the list on the right and click **OK.**

Request Blocks Tab

Example: This tab shows a graph of catalog request blocks. Nancy can hover over a block to see the related information, such as block name, block range, next number, and numbers used. On this tab, Nancy can change resource request blocks for the resource catalog categories.



1 Click the **Add** (+) icon to open the Add Request Block screen.



a Select a catalog from the **Select Catalog*** drop-down. Repeat this step as often as needed.

Note: To create request blocks across multiple catalogs at the same time, simply select more than one catalog from the **Select Catalog** drop-down within the same request.

b **Name*** the request block.

c Enter Start* and End* values for the request block.

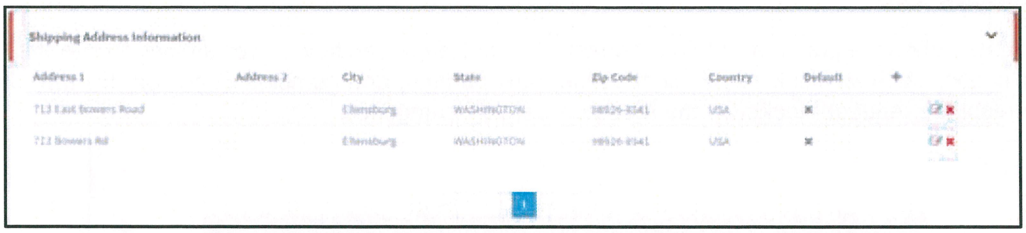
d Enter the Purpose for the request block.

e When done, click **Save**.

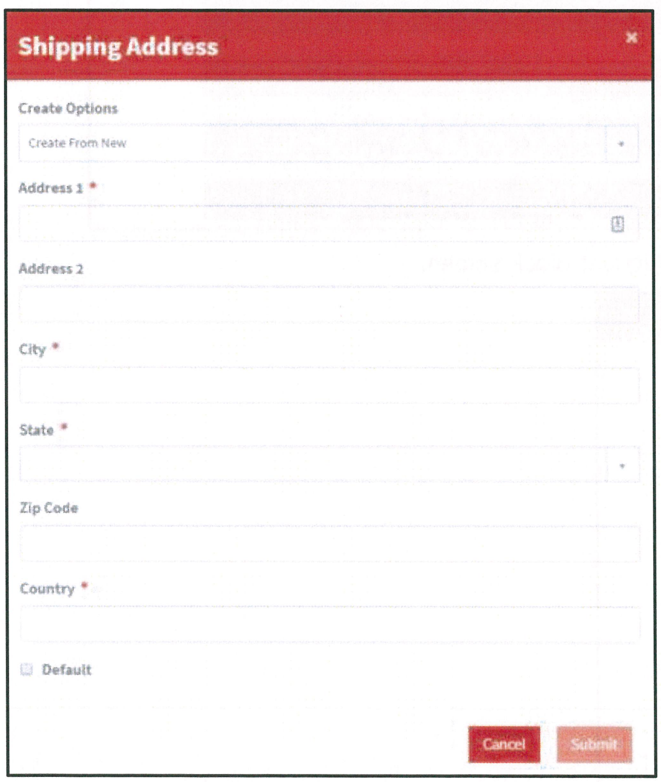
2 Click the **Edit** icon to open the Edit Request Block screen, where you can modify or split a request block. When done, click **Save**.

Shipping Address Information Tab

Scenario: On this tab, Nancy can create or edit specific locations for supply shipments.



1 Click the **Add** (**+**) icon to add a shipping address.



a. To create a new address – **Create From New** is the default under **Create Options**. With this selected, fill in the relevant information. Click the **Default** checkbox if applicable. When done, click **Submit**.

b. To add an existing organization – Select **Create from Organization** from Create Options. Choose an **Organization** and **Organization Address** (existing organizations may have multiple locations). The remaining information will be populated. Click the **Default** checkbox if applicable. When done, click **Submit**.

Note: Only one address can be the default.

2. Click the **Edit** icon in a row of the addresses list to edit an existing location. When done, click **Submit**.
3. Click the **Delete** icon and then click **OK** to remove an address from the incident.

Basic IROC Training: Student Guide

Creating a New Request

Contents

1. Objectives

Upon completion of this unit, you will be able to:

- Create a request
- Add a financial code to a request
- Add a location to a request
- Add a contact to a request
- Create an NFES request
- Add an address to an NFES request
- Create a supplemental request
- Add forms to a request
- Create a configuration request
- Create Compact, EMAC, or state-to-state orders

2. Requests Overview

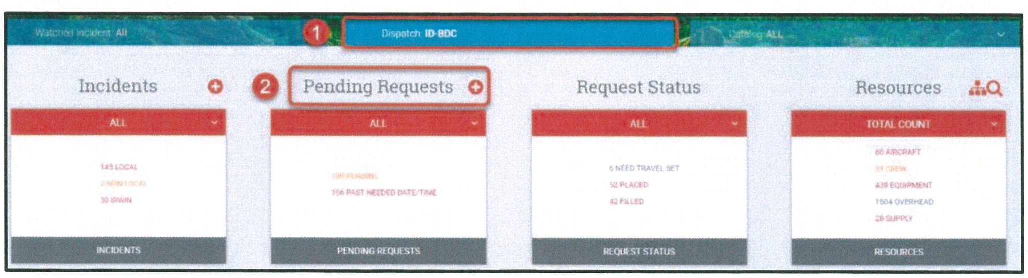
Requests are orders for resources needed on an incident. An incident can have many requests. In IROC, the subject of requests—requested items—are organized into five catalogs: Aircraft, Crew, Equipment, Overhead, and Supplies. The catalogs are further organized by category to simplify searching and filtering. Most catalog items require the same request information. However, there are some key differences depending on the selections you make, as detailed in Required and Optional Data Associated with a Request at the end of this guide.

Notes:

- Because of the Agile development used to create IROC, some of the screenshots, action buttons, and filters described here will be different from what you may see in the IROC instance you are viewing.
- Example scenarios used throughout this student guide may not accurately reflect dispatch manager workflows and are used only as a tool to walk through the features in training.

3. Creating a Request

As a dispatcher, you may need to create a request for an incident supported by your dispatch center.

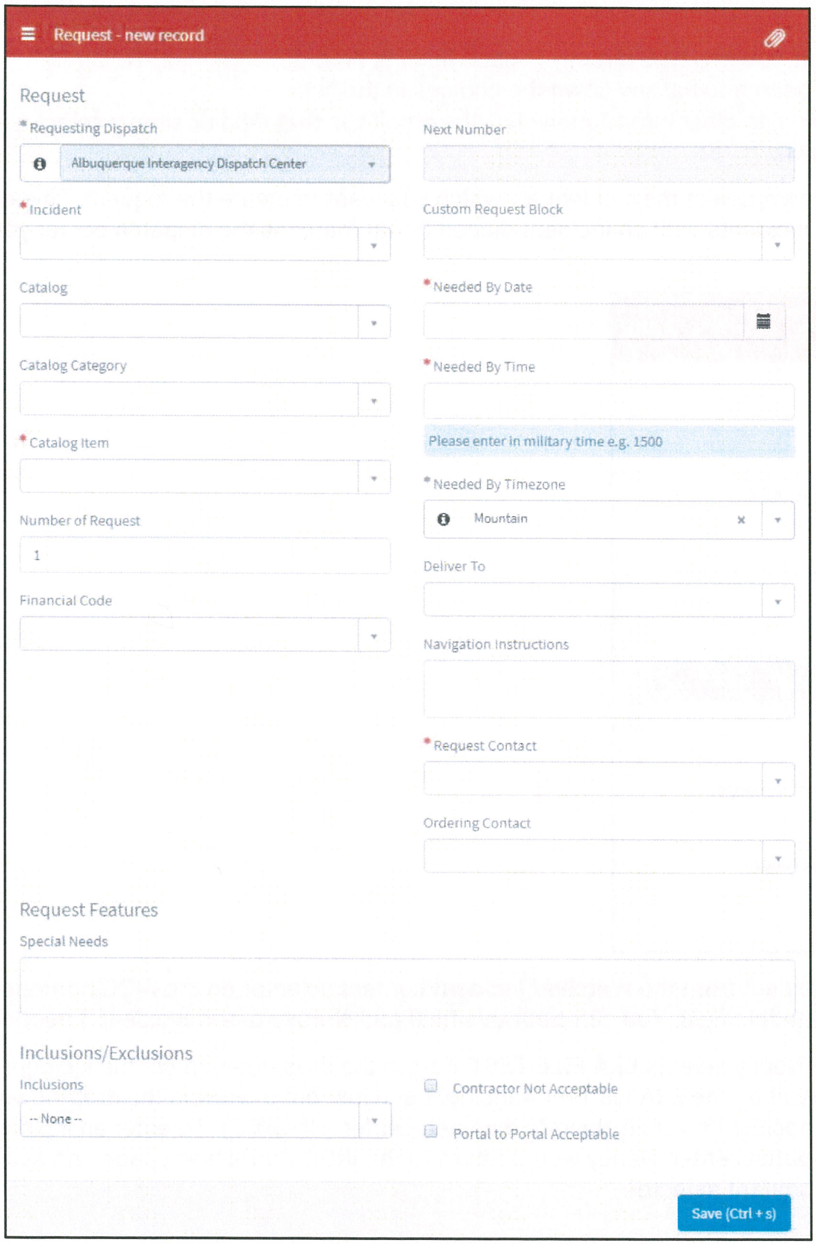


1 On the IROC Portal homepage, select a dispatch center from the **Dispatch** content selector.

Note: If you select an incident from the **Watched Incident** content selector, your request will be created for that incident. In this screenshot, your request would not have an incident automatically associated with it, because you have **Watched Incident: All** in the content selector.

2 Click the **Add** ( ) icon in the Pending Requests action tile to open the Create New Request screen.

3 The **Requesting Dispatch** field will automatically populate with the dispatch center you are currently logged into.



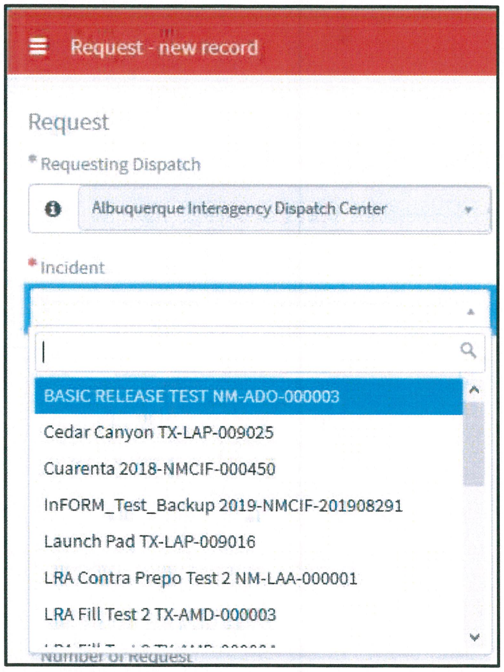
Notes:

- All items marked with an asterisk (*) in IROC are required.
- Clicking the **Information** icon (ℹ) will open a screen with details for the related record.

Tips:

- Unless otherwise noted, you can type directly in each field. In drop-down menus, IROC will perform a type-ahead search to narrow down the choices in the list.
- In most drop-down fields, to clear information click the small **x** in that field or simply select a new item from the drop-down.

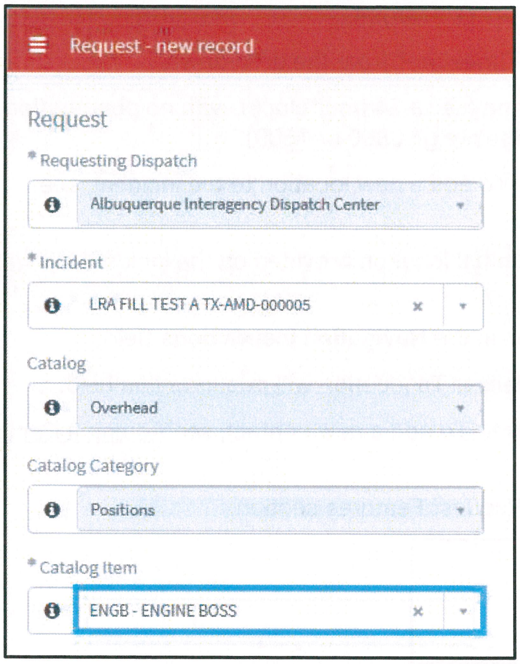
4 From the **Incident*** drop-down, select the incident for which you want to create the request. This drop-down contains a list of all incidents with an incident dispatch that matches the dispatch center you are logged into.



Note: If you selected an incident from the **Watched Incident** content selector on the IROC homepage, it will automatically populate this field. You can clear this field and choose a new incident if needed.

Example Scenario: Dispatcher Nancy selects **LRA FILL TEST A** from the drop-down to set the incident for the request. (**Note:** In the screenshot, the LRA Fill Test A incident and just out of view in the drop-down.) The drop-down includes only those units within Nancy's dispatch center (NM-ABC). To enter an incident associated with a different dispatch center, Nancy would return to the IROC Portal homepage and select a new center from the **Dispatch** content selector.

5 Choose the **Catalog***, **Catalog Category***, and **Catalog Item*** for the resource you want to request.



Notes: You can do this in any order. Choosing the catalog first will narrow down the items in the catalog category list. Choosing the catalog category will narrow down the catalog item list.

- The **Catalog** drop-down lists the five catalogs: Aircraft, Crew, Equipment, Overhead, and Supply.
- The items in the **Catalog Category** field will change to reflect the chosen catalog.
- The **Catalog Item** will be filtered to contain all catalog items within the selected **Catalog** and **Catalog Category** fields.
- If you choose from the **Catalog Item** field first, the **Catalog** and **Catalog Category** fields will automatically populate.

Example Scenario: Dispatcher Nancy needs an engine boss for the request. She chooses **Overhead** from the **Catalog** drop-down and then types "EN" in the **Catalog Item** field. She selects **ENGB – ENGINE BOSS** from the drop-down. The **Catalog Category** field automatically populates with **Positions**.

6 Enter the **Number of Requests**, representing the number of requests you want to create for this catalog item. IROC defaults this value to 1.

Note: If you choose an item that requires a reload base, the **Reload Base** field will appear. Choose the desired reload base from the drop-down.

7 *Optional:* From the **Financial Code** drop-down, select a financial code. (To add a new financial code, see Adding a Financial Code to a Request.)

Notes: This list will show all financial codes associated with an incident.

8 Select a **Custom Request Block** from the drop-down to determine numbering for this request.

Note: Custom request blocks are defined on each incident. If no custom request blocks are defined for the catalog associated with this request on this incident, the drop-down will be empty.

Tip: For more information on creating and editing request blocks, see "Request Blocks Tab" in *Maintaining Incidents Student Guide.*

9 Click the **Calendar** icon ( ) to set the **Needed by Date***.

Tip: To manually enter the date and time, use MM-DD-YYYY format.

10 Set the **Needed by Time*** and select the **Needed by Timezone*** from the drop-down.

Note: You must enter the time in four-digit military time (i.e., a 24-hour clock), with no punctuation. The time entry must be formatted on hours and minutes (e.g., 0800 or 1600).

11 Select the **Deliver To*** location from the drop-down. (To add a new location to the incident, see Adding a Location to a Request.)

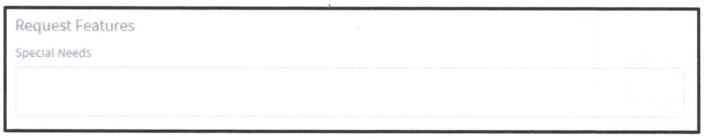
Note: The **Deliver To** drop-down is populated by the initial location provided on the incident, as well as any locations subsequently added to the incident.

12 *Optional:* Type instructions for the **Deliver To** location in the **Navigation Instructions** field.

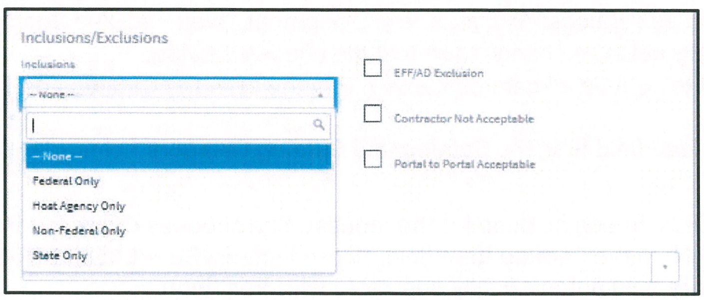
Note: Any instructions associated with an existing **Deliver To** location will populate this field.

13 Select the **Request Contact*** and the **Ordering Contact**. (To add a new contact, see Adding a Contact to a Request.)

14 If needed, type any **Special Needs** in the field in the Request Features section.



15 Set **Inclusions/Exclusions** by choosing from the **Inclusions** drop-down and clicking in the appropriate exclusion checkboxes on the right.

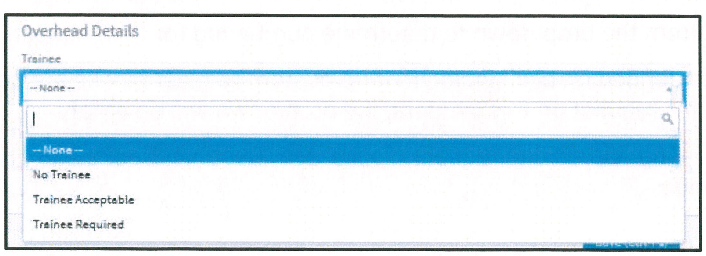


a This portion of the form is where you create Compact, EMAC, or state-to-state orders. To specify the type of order, select the appropriate inclusion/exclusion. (For more information, see Creating Compact, EMAC, or State-to-State Orders.)

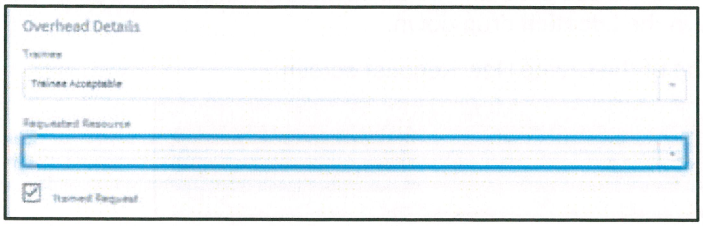
Note: The **EFF/AD Exclusion** checkbox only appears for overhead catalog items.

16 For overhead catalog items:

a Select from the **Trainee** drop-down in Overhead Details: **No Trainee**, **Trainee Acceptable,** or **Trainee Required.**



b To generate a named request for an overhead item, check the **Named Request** field and choose from the **Requested Resource** drop-down that appears.

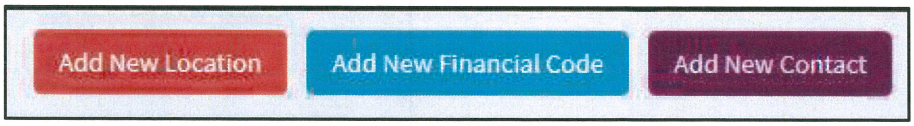


17 When done, click **Save** (or Ctrl-s) to place the request in your pending request list.

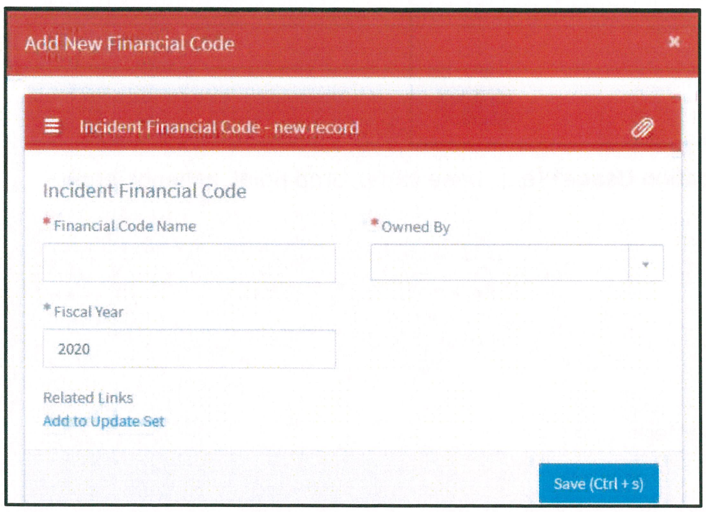
Adding a Financial Code to a Request

When creating a request, you can choose to add a financial code to be associated with the incident. This financial code will then be available to you in the **Financial Code** drop-down.

1 Click **Add New Financial Code** at the top of the Create New Request screen.



2 IROC presents the Add New Financial Code screen.



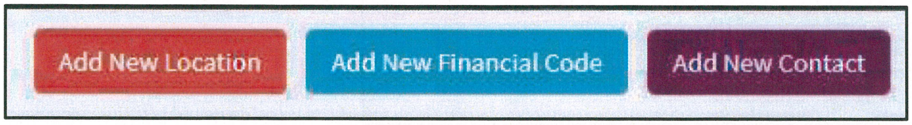
3 Fill in the required fields: **Financial Code Name***, **Owned By***, and **Fiscal Year***.

4 When done, click **Save** to save the financial code and associate it to the incident.

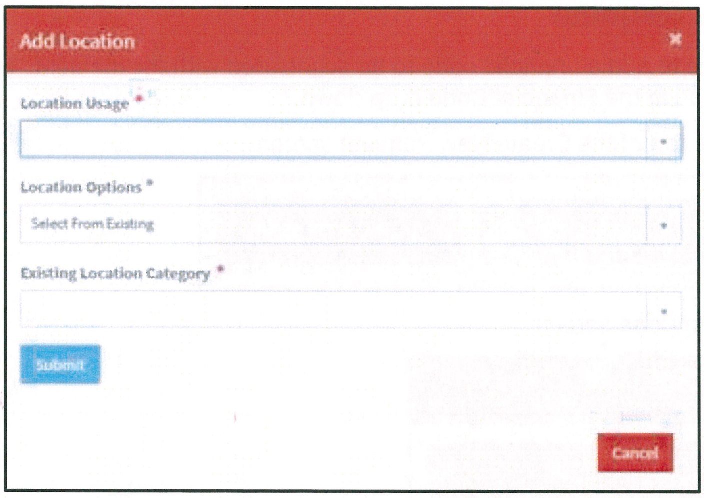
Adding a Location to a Request

When creating a request, you can choose to add a location to be associated with the incident. This location will then be available to you in the **Location** drop-down.

1 Click **Add New Location** at the top of the Create New Request screen.



2 IROC presents the Add Location screen. From this screen, you can either select an existing location or create a new one for the incident.

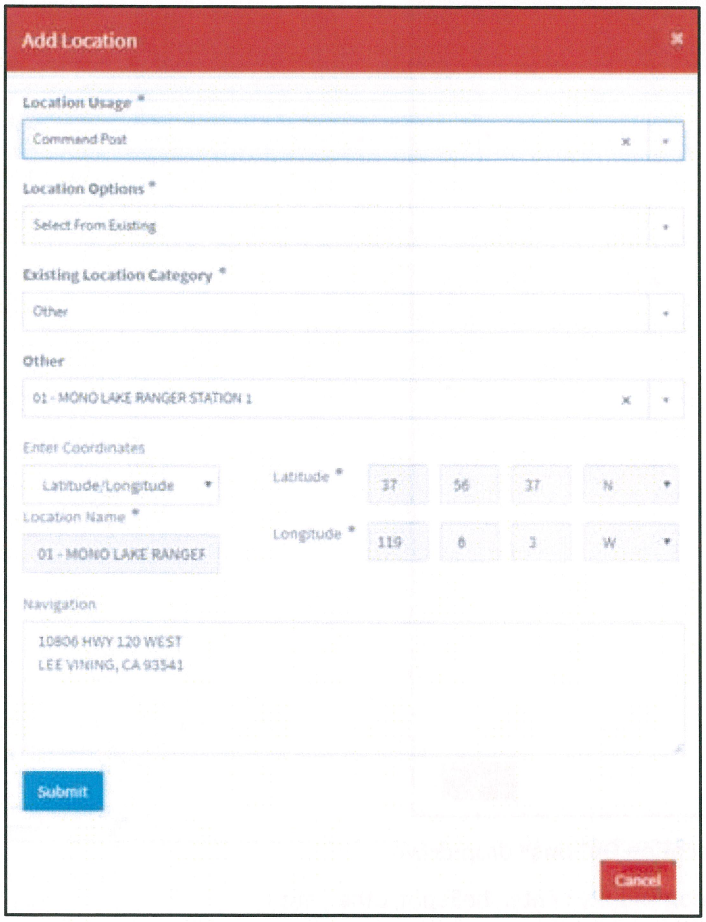


3 For either option, first select the **Location Usage*** (e.g., base camp, drop point, helispot, etc.).

Valid Location Usage Selections

- Base Camp
- Command Post
- Delivery Point
- Demobilization Center
- Drop Point
- Equipment Inspection Demob Center
- Evacuation Center
- Expanded Dispatch Center
- Fire Cache
- Helibase
- Heliport
- Helispot
- Mobilization Center
- R&R Center
- Staging Area
- Water Dip Site

4 To select an existing location:

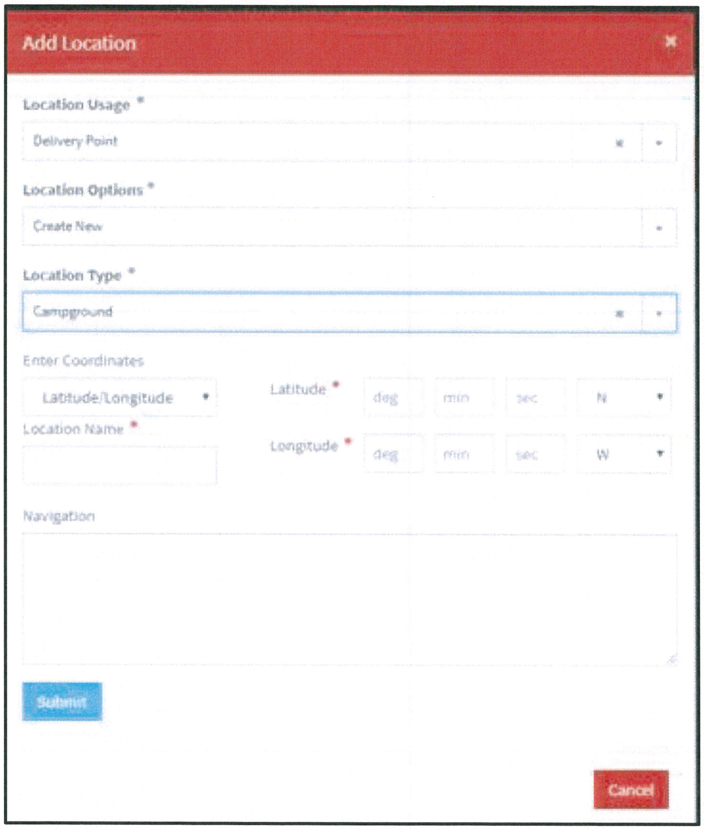


- **a** Choose **Select from Existing** from the **Location Options*** drop-down.
- **b** Choose an **Existing Location Category*** (airport, organization, or other)
- **c** Choose the appropriate item from the fourth drop-down.

Note: The title of this fourth field changes to match the chosen location category.

- **d** The location **Coordinates** and **Location Name** will automatically populate.
- **e** Any navigation instructions associated with the selected location will automatically populate the **Navigation** field. You can type additional information directly in this field if needed.
- **f** When done, click **Submit**.

5 To add a new location:



a Choose **Create New** from the **Location Options*** drop-down.

b Choose a **Location Type*** (e.g., community center, helispot, other, etc.).

c Enter the coordinates:

- If you select Latitude/Longitude, then you must enter the **Latitude*** and **Longitude***.
- If you select UTM, you must enter **Easting***, **Hemisphere***, **Northing***, and **Zone***.
- If you select Town, Range and Section (TRS), you must enter **Principle Meridian***, **Township***, and **Range***.

Note: IROC automatically converts from the coordinate type you entered (lat/long, UTM, or TRS) to the other two.

6 Enter the **Location Name***.

7 If needed, type instructions in the **Navigation** field.

8 When done, click **Submit** to save the location and associate it to the incident.

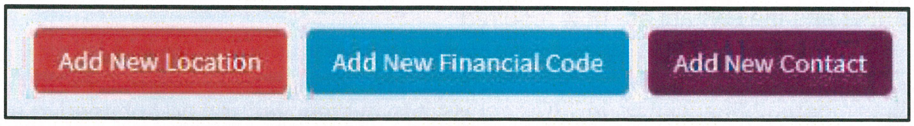
Note: After clicking **Submit**, the Add New Location screen will remain, allowing you to add more locations. If you are done, click **Cancel** to return to the Create New Request screen.

Adding a Contact to a Request

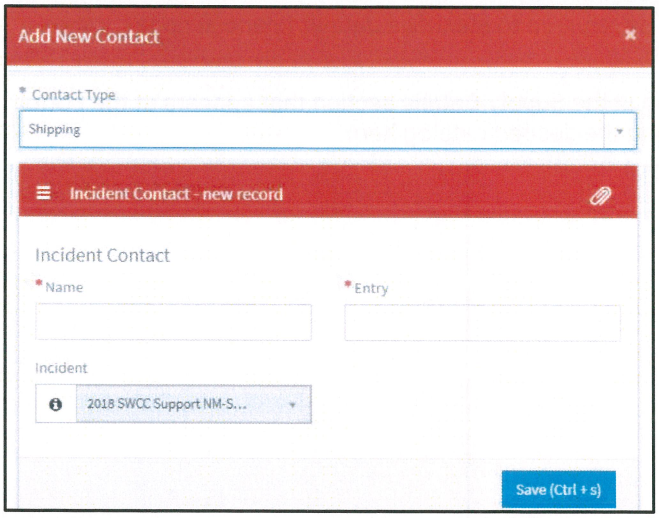
When creating a request, you can choose to add a new contact to be associated with the incident. This contact will then be available to you in the **Request Contact** and **Ordering Contact** drop-downs. It will also appear in the **Shipping Contact** field for NFES supplies.

> **Tip:** If the name does not appear after adding the contact, type in the drop-down field to perform a type-ahead search.

1 Click **Add New Contact** to open the Add New Contact screen.



2 Select the **Contact Type*** from the drop-down.



> **Valid Contact Types**
> - Assigning
> - Ordering
> - Pickup
> - Requesting
> - Shipping

3 Enter the required information: **Name*** and **Entry*** (phone number or email).

4 Click **Save** to save the contact and associate it with the incident.

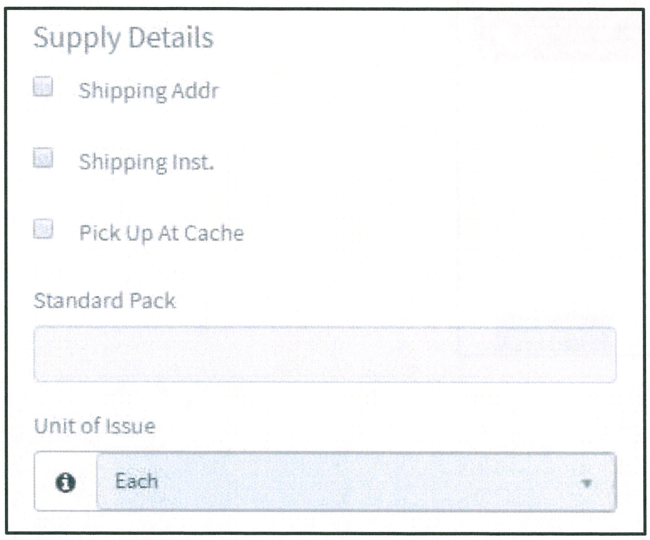
4. Creating an NFES Request

You can create a request for an NFES supply item and place the request to supply cache. The requirements for NFES requests are different from those for other types of requests. Before a request can be placed to a cache, the following must be true:

- The incident must have a default financial code, and the request must have a financial code.
- You must provide shipping information either in the form of a shipping address or shipping instructions or by explaining that the item will be picked up at the cache.
- Both the phone number and the contact are now required.

> **Notes:**
>
> - If the incident has a default financial code, IROC copies it to the request; you do not need to enter a separate financial code for the request.
> - If you create a financial code for the request but the incident does not have a default financial code, you'll receive an error and will be required to identify a default financial code for the incident.

The information for NFES requests is entered in the **Supply Details** section that appears at the bottom of the Create New Request screen after choosing the desired catalog item.

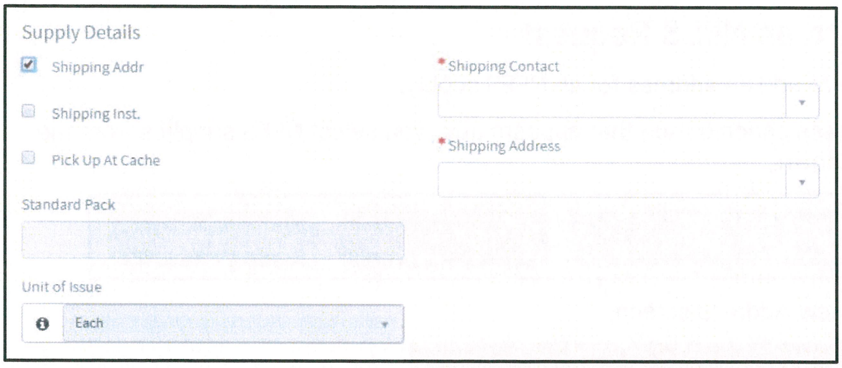


1 Select the NFES supply catalog item you want to request. (See Creating a Request, step 5.)

2 IROC presents the additional required fields in the Supply Details section of the Create New Request screen.

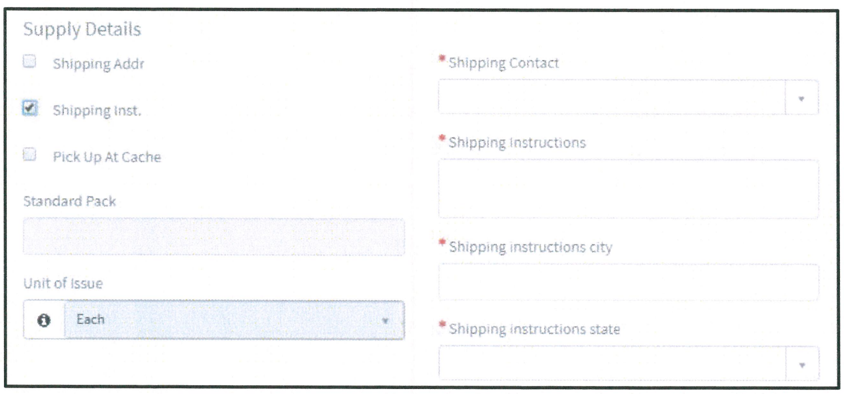
> **Note:** The information in this section changes depending on the checkbox you select on the left.

3 If you select Shipping Address, choose the **Shipping Contact*** and **Shipping Address*** from the drop-down menus.



Note: You can create a new shipping contact and/or a new shipping address by clicking the **Add New Contact** or **Add New Address** action buttons at the top of the Create New Request screen. (See also Adding a Contact to a Request and Adding an Address to an NFES Request.)

4 If you select Shipping Instructions, choose the **Shipping Contact***, **Shipping Instructions City***, and **Shipping Instructions State*** from the drop-down menus. You may also enter **Shipping Instructions** by typing in the field.



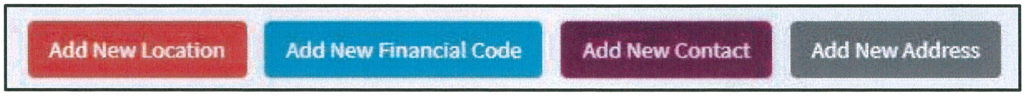
5 If you select Pick Up At Cache, choose the **Shipping Contact***, **Pickup Contact***, **Pick Up Date***, **Pick Up Time***, and **Pick Up Date Time zone*** from the drop-down menus.

Note: For information on managing pending requests, including placing up to your parent dispatch center for a request that you created but cannot fill, see *Managing Pending Requests Student Guide*.

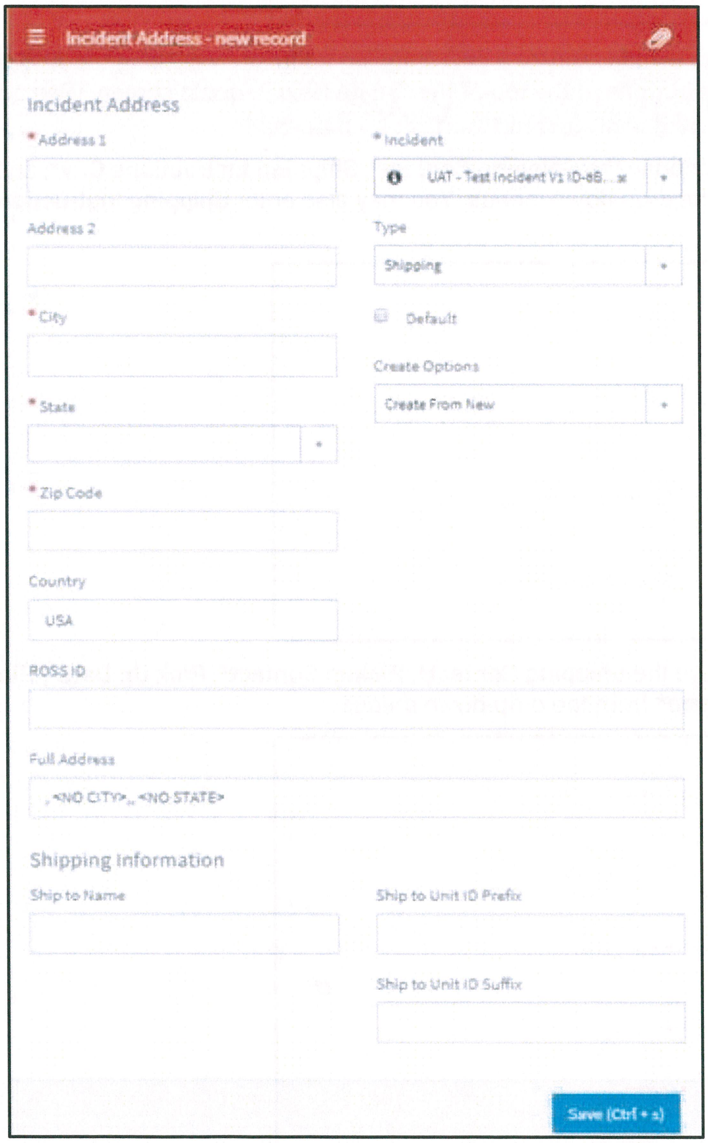
Adding an Address to an NFES Request

Follow the instructions here to add an address for an NFES supply.

1 Click the **Add New Address** action button that appears after you select NFES supplies from the **Catalog Category** drop-down.



2 IROC displays the Add New Address screen.



3 To select an existing organization:

a Choose **Create From Organization** in the **Create Options** drop-down.

b Select the **Organization*** and **Organization Address*** in the fields that appear.

c The address and **Type** fields will automatically populate with the address details and shipping type. You can modify any of the fields if necessary.

d Click the **Default** checkbox if this will be the default shipping address.

e When done, click **Save**.

4 To create a new address:

a Select **Create From New** in the **Create Options** drop-down.

b Fill in the required fields: **Address 1***, **City***, **State***, and **Zip Code***.

c Indicate the type of address: **Mailing**, **Official**, or **Shipping**. This field defaults to **Shipping**.

d Click the **Default** checkbox if this will be the default address.

e When done, click **Save**.

5. Create a Supplemental Request

For requests that require a supplemental form, you can attach the form directly to the request. This can be done when creating a request (in the Create New Request screen) or when managing a request (from either the Manage Request screen or the Request Details accordion view). Once attached, the form can be viewed by anyone in the ordering chain (requesting, filling, etc.). Examples of requests requiring supplemental forms:

- Temporary Flight Restriction (TFR)
- Infrared Flight Request
- Mobile Food and Shower Service Request Form

For example, for infrared flight requests, a form would be attached to the request to specify infrared scanner boundaries, radio frequencies and remarks, incident weather, delivery points, or incident VOR. The adding a supplemental form appear on the next page.

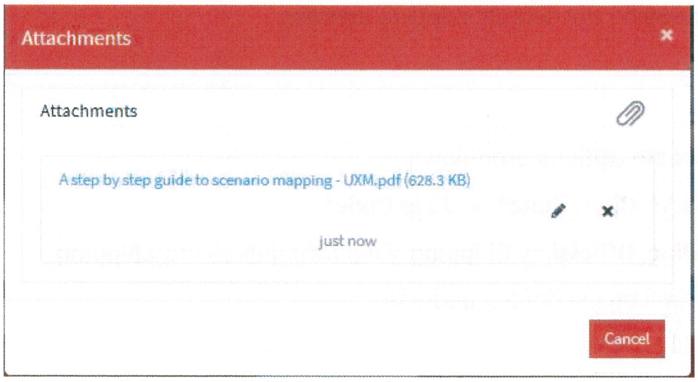
The instructions for adding or modifying a supplemental form can also be followed to add a Detail Request Form or Manifests.

Attaching a Supplemental Form

Regardless of when you decide to add a form, the instructions are the same.

1 Click the **Attach** icon ( ) at the top of the page.

2 In the Attachments screen, you can either click the gray **Attach** icon in the **Attachments** field and select a file or drag and drop a file from your computer into the **Attachments** field.



Notes:

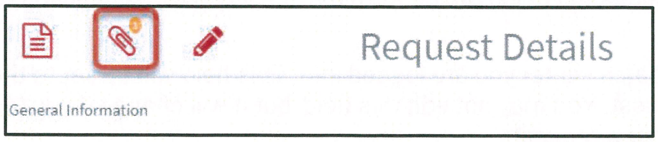
- If adding an attachment from the Create New Request screen, you can simply choose a file from your computer after clicking the **Attach** icon.
- To remove an attachment added on the Create New Request screen, click **Edit** and then click **Delete (x)**.

3 When done attaching from the Manage Request screen or Request Details accordion, click the **x** in the upper right corner to close the Attachments screen.

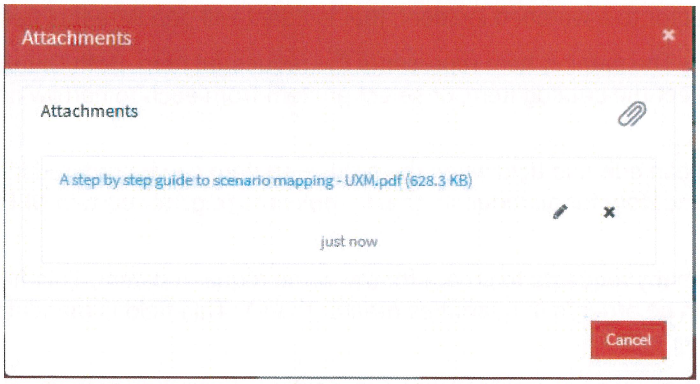
4 To view the attachment, you can see it at the top of the Create New Request screen. In the Manage Request screen and the Request Details accordion, a small number beside the Attach icon indicates that the request has additional forms added.

Modifying a Supplemental Form

On the Manage Request screen and in the Request Details accordion view, a small number beside the **Attach** icon will indicate the number of attachments on this request.



1 Click the **Attach** icon to open the Attachments screen.



2 To rename a file, click the **Edit** (✎) icon and make your changes.

3 To remove a file, click the **Delete** (**x**) icon to the right of the file name and then click **OK**.

4 To add more files, click the gray **Attach** icon or drag and drop.

5 When done, click the small **x** in the upper-right corner to close the screen.

6. Creating a Configuration Request

You may create a configuration request using the same steps you would use for creating any request. The configuration is identified on the catalog item you request. For information on filling the configuration request and its subordinates, see *Assignment Rosters Student Guide*.

> **Note:** Keep the following in mind when creating a configuration request:
>
> - The request you create will be the parent request for the configuration.
> - The subordinate requests for the configuration will not be generated when you create the parent request.
> - You must fill the parent request, create the assignment roster for the parent request, and then generate the subordinate requests.

7. Creating Compact, EMAC, or State-to-State Orders

You may create a Compact, EMAC, or state-to-state order using the same steps you would use for creating any request. In Step 15 of Creating a Request, specify the type of order by selecting the appropriate **Inclusions and Exclusions** in the lower section of the **Create Request** screen. These types of requests can then be placed in IROC through predetermined selection areas.

8. Required and Optional Fields Associated with a Request

The information shown in the Create Request screen will change depending on the catalog item you are requesting. All items in this list that are marked with an asterisk are required for all catalog items. Depending on the item you are requesting, additional fields on the form may be required, as indicated by asterisks and/or a system message in IROC.

Requesting Dispatch* – Represents the dispatch center you are logged into. This field will be set to the dispatch requesting the resource on the request. You may not edit this field, but it will change if you log into a different dispatch center and create a new request.

Incident* – Represents the incident for which you are creating the request. This field is required for all requests. If you filtered your content selector to a watched incident, that incident will populate this field.

Catalog*, Category*, and Catalog Item* – The catalog item represents the requested item. Both **Catalog** and **Category** are populated once you select the catalog item, or select an item from each to narrow down the choices in the **Catalog Item** list.

Quantity Requested – Defaults to 1. You can edit this field when the requested item can be ordered in quantities greater than 1. This field is mandatory for all requests that it applies to (e.g., for certain NFES supplies).

Number of Requests – Determines how many requests to create for the same requested item. This field does not display if the requested item can be ordered in quantities greater than 1. This field is mandatory for all requests that it applies to.

Financial Code – The list shows all financial codes associated with the incident, if any. You may update it by adding a new financial code. (See Adding a Financial Code to a Request.)

Request Block – The default request blocks for each catalog for the incident are used by default. You can select a custom request block to change the numbering for the request. Custom request blocks are defined on each incident. If no custom request blocks are defined for the catalog associated with this request on this incident, the drop-down will be empty.

Needed by Date* – The day, month, and year that the requested item is needed. This field is mandatory for all requests.

Needed by Time*/Timezone* – The hour and minute and time zone on the needed by date that the requested item is needed. These fields are mandatory for all requests.

Deliver to Location* – This field defaults to the incident location. You may update it by adding a new location. (See Adding a Location to a Request.) This field is mandatory for all requests except for NFES supplies.

Navigation Instructions – Displays when the request is for a non-NFES catalog item. You may update it by typing in the field.

Requesting Contact* – This drop-down includes incident contacts with the type "requesting." This field is mandatory.

Ordering Contact – This field represents the ordering contact on the incident. You may update it by adding a new contact. (See Adding a Contact to a Request.)

Reload Base – This field defaults to the dispatch organization's default reload base. You may update it. It is required when the requested item requires a tanker base, such as an Airtanker, Type 3 (Multi-Engine).

Special Needs – This field is optional. You may update the special needs text when the request is pending and the resource's mob ETD has not passed.

Features – This field appears for certain types of requests, such as indicating the desired features for a Helicopter, Type 1, Standard. Requested features will not limit what can be filled.

Inclusions – Defaults to **None**. You may update it to include or exclude certain resources (e.g., Federal Only, State Only, Host Agency Only, or Non-Federal Only.).

Trainee Status Exclusion – In Overhead Details, this defaults to **No Trainee**. You may update it to **Trainee Allowed** or **Trainee Required**.

EFF/AD Exclusion – Defaults to no checkmark, which means this exclusion does not apply. Clicking to select the checkbox excludes emergency firefighters from filling the request. This only appears when requesting an overhead catalog item.

Contractor Not Acceptable Exclusion – Defaults to no checkmark, which means this exclusion does not apply. Clicking to select the checkbox excludes contractors from filling the request.

Portal to Portal Acceptable Exclusion – Defaults to no checkmark, which means the exclusion does not apply. Clicking to select the checkbox excludes portal resources from filling the request.

Reporting Instructions – Will only display when the requested item is a non-NFES supply item.

Item Description – Displays if you select "!Not in Catalog Supplies" for a non-NFES supply.

Named Request – If selected, an overhead resource name can be requested from the list of all qualified resources in IROC.

Supply Details – This section appears when requesting an NFES supply. See Creating an NFES Request for more information. All required fields in this section are marked with an asterisk.

Overhead details – For overhead requests, you will have the option to choose Rental Car Approved, Cell Phone Approved, and Laptop Approved.

Attach Icon – Click the **Attach** icon at the top of the page to add supplemental requests for temporary flight restrictions, infrared aircraft scanners, or food service. You can also click this icon to add manifests to crew catalog requests or to add module requests or detail request forms to overhead requests.

Basic IROC Training: Student Guide

Managing Pending Requests

Contents

1. Objectives

Upon completion of this unit, you will be able to:

- Access pending requests from list view and the Manage Request screen.
- Filter the Pending Requests list.
- Navigate the Manage Request screen.
- Claim a request.
- Place a request up, down, or direct.
- Cancel a request.
- UTF a request.
- Cancel UTF a request.
- Send back an incorrectly placed request.
- Send back a request as unable to fill (UTF).
- Retrieve a request.
- Fill a request with available and reserved resources.
- Fill a request with a contracted resource.
- Fill a request with a VIPR resource.
- Fill a request with an EFF/AD resource.
- Fill a request with a local purchase.
- Fill with override.
- Generate a Resource Order Form.
- Document that a resource declined an assignment.

2. Pending Requests Overview

Pending requests are those requests awaiting action from your dispatch center. They were either created by or placed to your dispatch center. This document describes how to view and manage pending requests from the Pending Request work area or the Manage Requests screen in IROC.

For more information on pending requests and the request chain in general, see Request Chain Overview, at the end of this document.

> **Note:** Because of the Agile development used to create IROC, some of the screenshots, action buttons, and filters described here will be different from what you may see in the IROC instance you are viewing.

3. Pending Requests List View

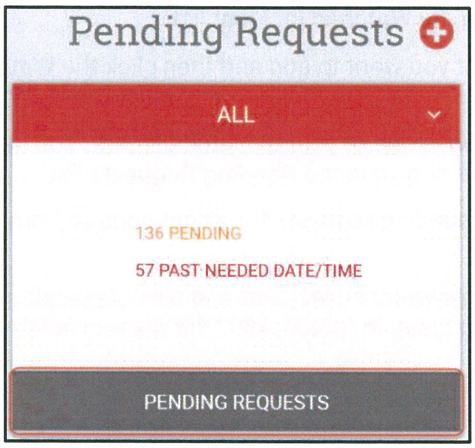
After a request has been created but not placed or filled, it sits in the Pending Requests list view. In this view, you can perform several actions on a request. This section describes how to access the list view and the actions you can take on requests from there.

Example scenario: Dispatcher Nancy has requests pending for her dispatch center. She needs to evaluate the requests and decide how to manage them. Nancy will use Pending Request filters to find the requests needed and then take action on them.

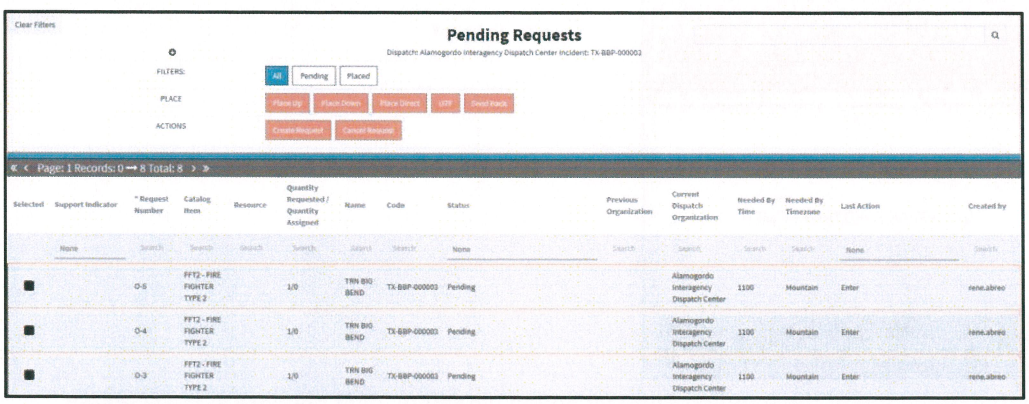
Accessing the Pending Requests List View

Follow these steps to access the **Pending Requests** list from the IROC homepage.

1 Click the **Pending Requests** list selector on the Pending Requests action tile.



2 IROC displays the Pending Requests list view in the work area.



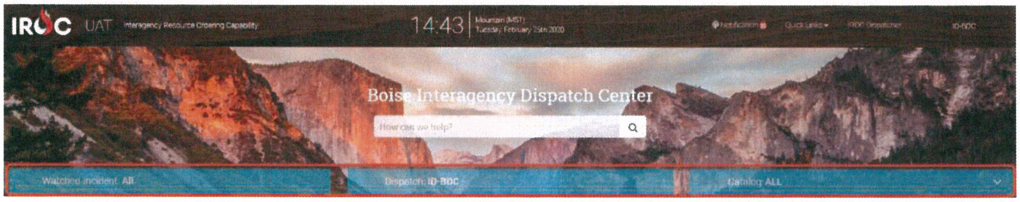
Filtering the Pending Requests List

Before taking action on a request, you can use the various filter functions in IROC to find a specific pending request record. Each option is explained in further detail in this section.

- The content selectors, including Watched Incident, Dispatch, and Catalog
- The Pending Requests selector bar, including All, Local, and Non-Local
- The Pending Requests list view filters
- The Pending Requests list view columns

Filtering Using Content Selectors

The **Content Selectors** are drop-down lists on the IROC homepage that allow you to choose filters for the **Pending Requests** list.



1 **Watched Incident Content Selector** – Click on this selector to choose either a specific watched incident or all incidents at the dispatch center you are logged into. If you do not see the incident you want to filter for, navigate to the Incident list and either:

   a Click the **Star** icon for the incident you want to add to the **Watched Incident** list.

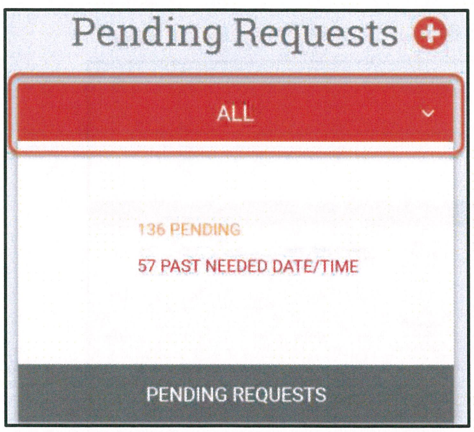
   b Check the box in the **Selected** column for the incident you want to add and then click the **Watch** action button.

2 **Dispatch Content Selector** – Click on this selector to choose one of your dispatch centers. You can only select one at a time. This will change the information shown in the **Pending Requests** list.

3 **Catalog Content Selector** – Click on this selector to see pending requests for all catalogs or from any one of the five catalogs.

> **Note:** These selectors are cumulative. If you select a single watched incident and a single catalog, the **Pending Requests** list will be filtered to show only the requests on that incident for the requested item's catalog.

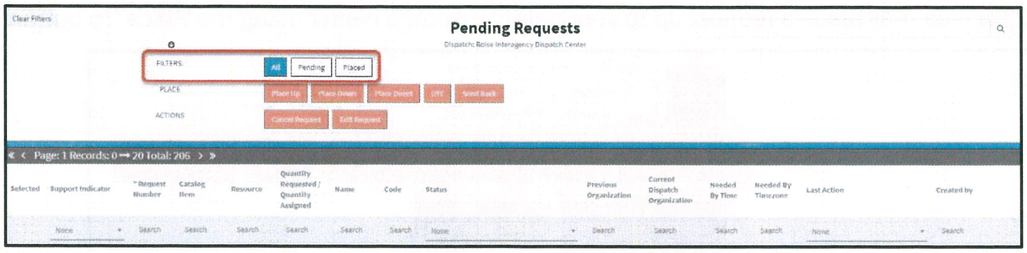
Filtering Using the Pending Request Selector Bar



The selector bar at the top of the Pending Request action tile filters what appears in the **Pending Requests** list.

- **All** – Select to show all pending requests for the incident, dispatch center, and catalog you selected in the content selectors.
- **Local** – Select to show all pending requests created at the dispatch center you're logged into for the incident and catalog you selected in the content selectors.
- **Non-Local** – Select to show all pending requests placed to the dispatch center you're logged into for the incident and catalog you selected in the content selectors.

Filtering Using the Pending Request Filters



The Pending and Placed filters on the **Pending Request** list are cumulative. You can click on one or both to alter what appears in the list view.

1 **All** – Displays all pending requests.

2 **Pending** – Displays pending requests *created* at the dispatch center you're logged into.

3 **Placed** – Displays all pending requests *placed* to the dispatch center you're logged into.

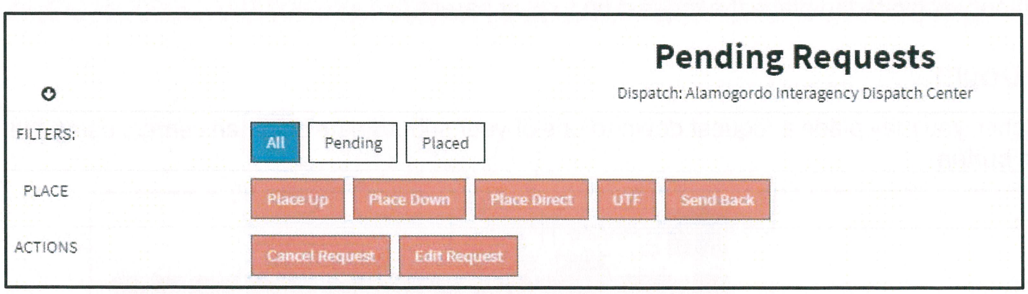
> **Note:** Keep in mind that the list is already filtered by the **Watched Incident**, **Dispatch Center,** and **Catalog** you selected in the content selectors. If you cannot find what you are looking for, you may want to clear the content selector filters by clicking **Clear Filters** in the upper-left corner of the list view work area.

Filtering Using the List View Columns

Refer to "Navigating the Work Area" in *Navigating the IROC Portal Student Guide* for more information on using the column header sort and the column header search options. You can also perform a wildcard search in the **Search** field in the upper-right corner of the list view work area.

4. Managing Requests in Pending Requests List View

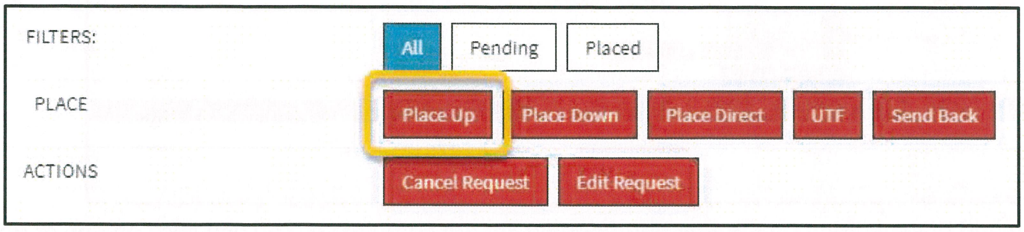
This section describes actions you can take on one or more requests from the Pending Requests list view. In this view, you can place multiple requests up, down, or direct. You can also cancel, UTF, or send back pending requests. The **Place** and **Action** buttons at the top of the screen will become active when you select one or more pending requests from the list. For all actions, first navigate to the Pending Requests list view from the IROC homepage.



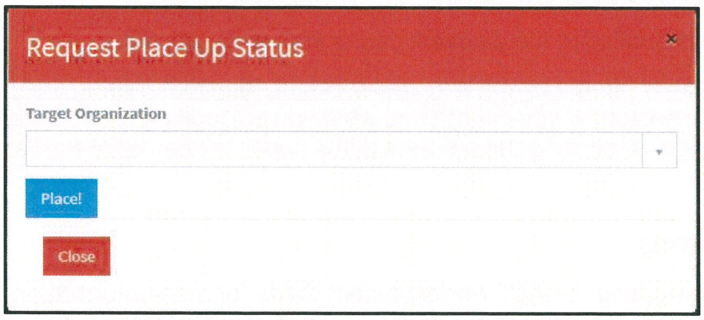
> **Note:** For more information on performing actions on a request, see Managing Requests in the Manage Request Screen.

Placing Up

As a dispatcher, you may place a request up to your parent dispatch center using the **Place Up** button.



1. In the Pending Requests list view, select one or more pending requests by clicking in the box in the **Selected** column.
2. Click the **Place Up** button to open the Request Place Up Status screen.



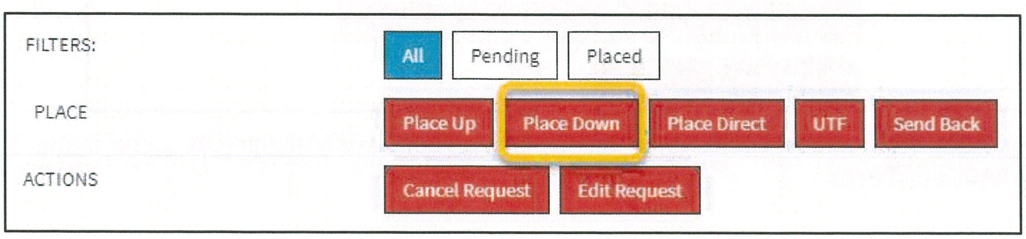
   a. Select the **Target Organization** from the drop-down.
   b. Click **Place**.
   c. Once IROC confirms the place action, click **Close**.

Note: Keep the following in mind when you are placing requests:

- The **Place Up** button will only become active if you have a parent dispatch center to which you can place the pending request.
- If a request was placed to you via a selection area, the selection area must have place up authority activated to place the request up to your parent.

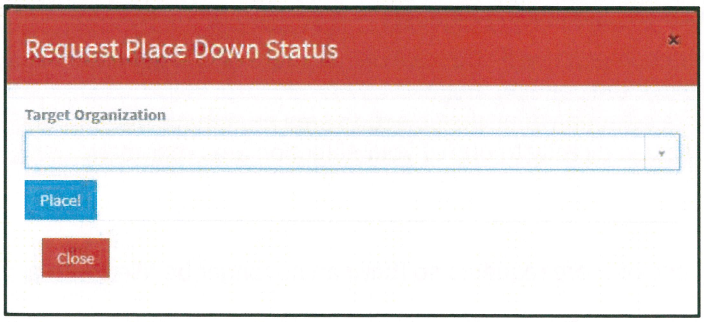
Placing Down

As a dispatcher, you may place a request down to one of your subordinate dispatch centers using the **Place Down** button.



1. In the Pending Requests list view, select one or more pending requests by clicking in the box in the **Selected** column.

2 Click the **Place Down** button to open the Request Place Down Status screen.



a. Select the **Target Organization** from the drop-down.

b. Click **Place**.

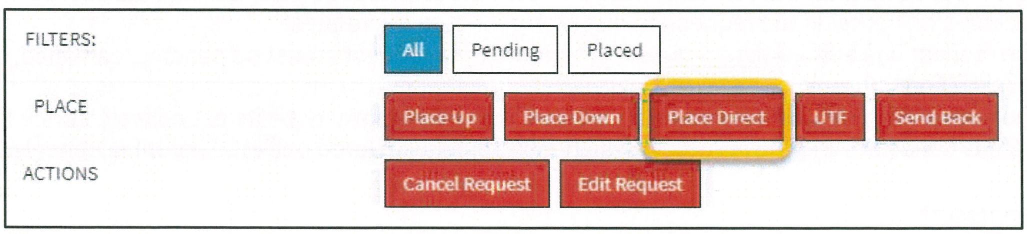
c. Once IROC confirms the place action, click **Close**.

Note: Keep the following in mind when you are placing requests:

- The **Place Down** button will only become active if you have one or more subordinate dispatch centers to which you can place the pending request.
- If a request was placed to you via a selection area, the selection area must have place down authority activated to place the request down to one of your subordinates.

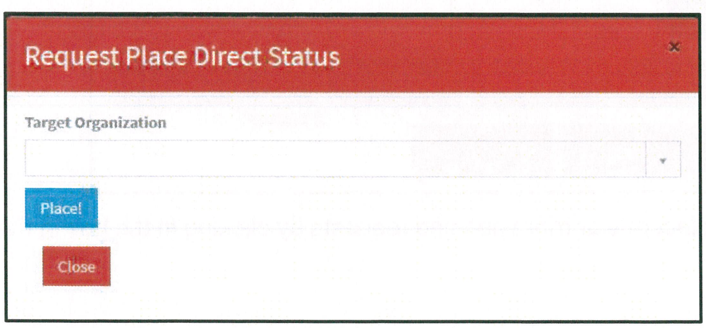
Placing Direct

As a dispatcher, you may place a request to one of your selection area members using the **Place Direct** button at the top of the **Pending Request** list.



1 In the Pending Requests list view, select one or more pending requests by clicking in the box in the **Selected** column.

2 Click the **Place Direct** button to open the Request Place Direct Status screen.



3 Select the **Target Organization** from the drop-down.

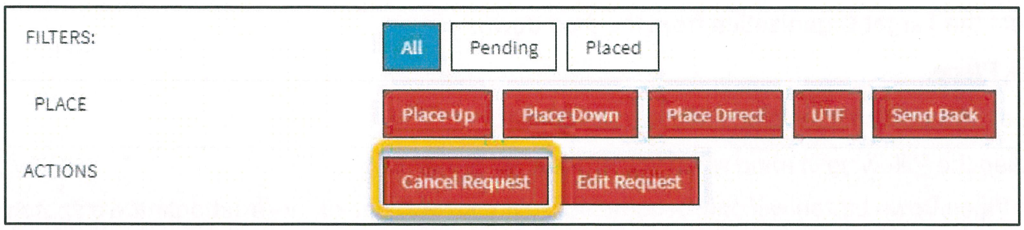
4 Click **Place**.

5 Once IROC confirms the place action, click **Close**.

Note: Keep the following in mind when you are placing requests:
- The **Place Direct** button will only become active if you have one or more dispatch centers in a selection area to which you can place the pending request.
- If a request was placed to you via a selection area, the selection area must have place direct authority activated to place the request directly to one of your selection area members.

Canceling a Request

As a dispatcher, you may need to cancel one or more requests so they can no longer be filled with a resource.



1 In the Pending Requests list view, select one or more pending requests by clicking in the box in the **Selected** column.

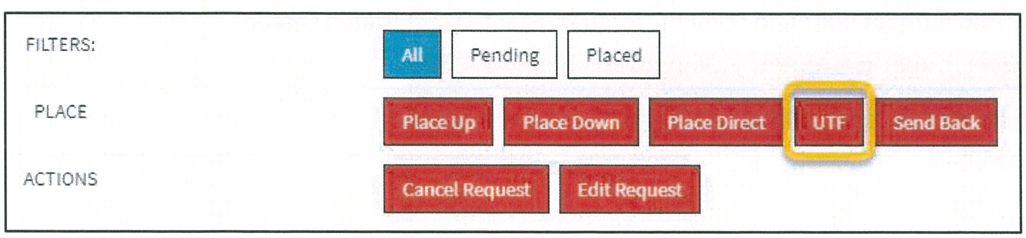
2 Click the **Cancel Request** button.

3 IROC will cancel the requests and remove them from the **Pending Requests** list.

Note: Keep the following in mind when you are cancelling requests:
- The **Cancel Request** button will only appear if the request is pending at your dispatch center and your dispatch center is the requesting dispatch center on the request.
- If the request has subordinate requests, all subordinate requests must be pending, canceled, or cancel UTFed.
- If the request has subordinate requests, all pending subordinate requests are canceled once the parent is canceled, and the request's assignment roster is deleted once the parent is canceled.

UTF a Request

As a dispatcher, if you are unable to fill (UTF) a request, you can return it to the dispatch center that placed it to you.



1 In the Pending Requests list view, select one or more pending requests by clicking in the box in the **Selected** column.

2 Click the **UTF** button.

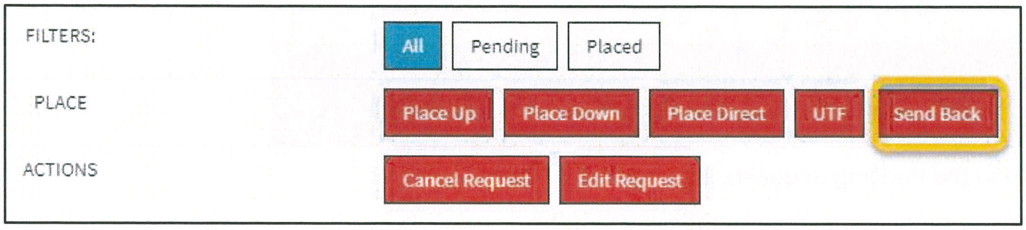
3 IROC will send the requests back to the dispatch center that placed it them you, mark them as unable to fill (UTF), and place them on that dispatch center's **Pending Request** list.

Note: Keep the following in mind when you are canceling requests because they are UTF:

- The **UTF** button will only appear if the request is pending and it was placed to your dispatch center.
- If the request has subordinate requests, all subordinate requests must be pending, canceled, or cancel UTFed.
- If the request has subordinate requests, all pending subordinate requests are cancel UTFed once the parent is cancel UTFed, and the request's assignment roster is deleted once the parent is cancel UTFed.

Sending Back a Request

As a dispatcher, you may send one or more requests incorrectly placed to you back to the dispatch center that placed them to you.



1 In the Pending Requests list view, select one or more pending requests by clicking in the box in the **Selected** column.

2 Click the **Send Back** button.

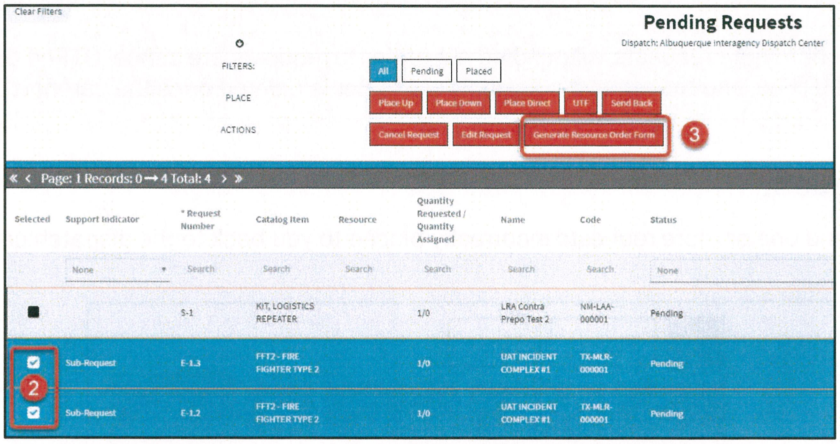
3 IROC will send the requests back to the dispatch center that placed them to you and place them on that dispatch center's **Pending Requests** list.

Notes: Keep the following in mind when sending back a request:

- The **Send Back** action button only appears if the requests you select are pending at your dispatch center.
- If the requests have support requests controlled by your dispatch center, you'll need to disposition those support requests.
- If the requests have support requests not controlled by your dispatch center, IROC will send a notification to the controlling dispatch center(s) notifying them that the parent request has been sent back.

Generating a Resource Order Form

As a dispatcher, you may need to send a request to someone who does not have direct access to IROC. To do this, you would generate a resource order form.

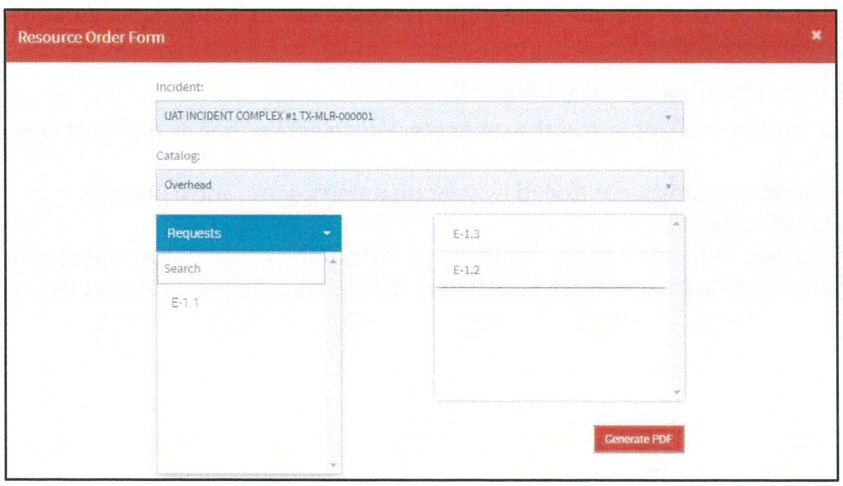


1 Navigate to the Pending Requests list.

2 Select one or more requests to include in your form.

> **Note:** To generate a request for multiple requests, the items must be for the same incident and be in the same catalog.

3 Click the **Generate Resource Order Form** action button to open the Resource Order Form screen.



4 From the **Requests** drop-down, you can choose additional requests to add to the form.

5 When done, click **Generate PDF**.

5. The Manage Request Screen

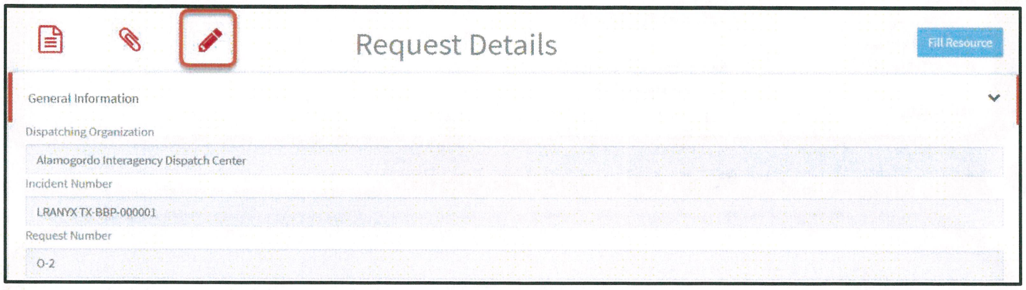
The Manage Request screen is the IROC place for taking actions on a request in IROC. This section of the guide explains how to access the Manage Request screen and provides an overview of its layout. See Managing Requests in the Manage Request Screen for more information.

Accessing the Manage Request Screen

There are two ways to access the Manage Request screen—from the Request Details accordion or from the Create Request screen.

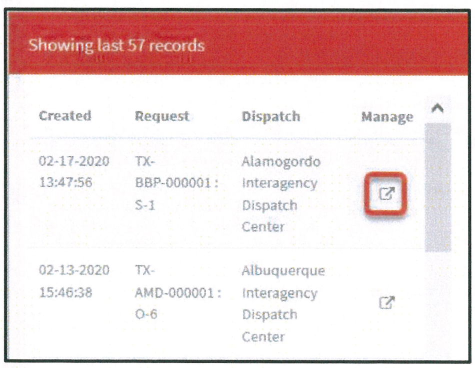
Access the Manage Request Screen from the Request Accordion

In the Request Details accordion view, click the **Edit** icon at the top of the screen to open the Manage Request screen, which shows all information related to that request.



Access the Manage Request Screen from the Create Request Screen

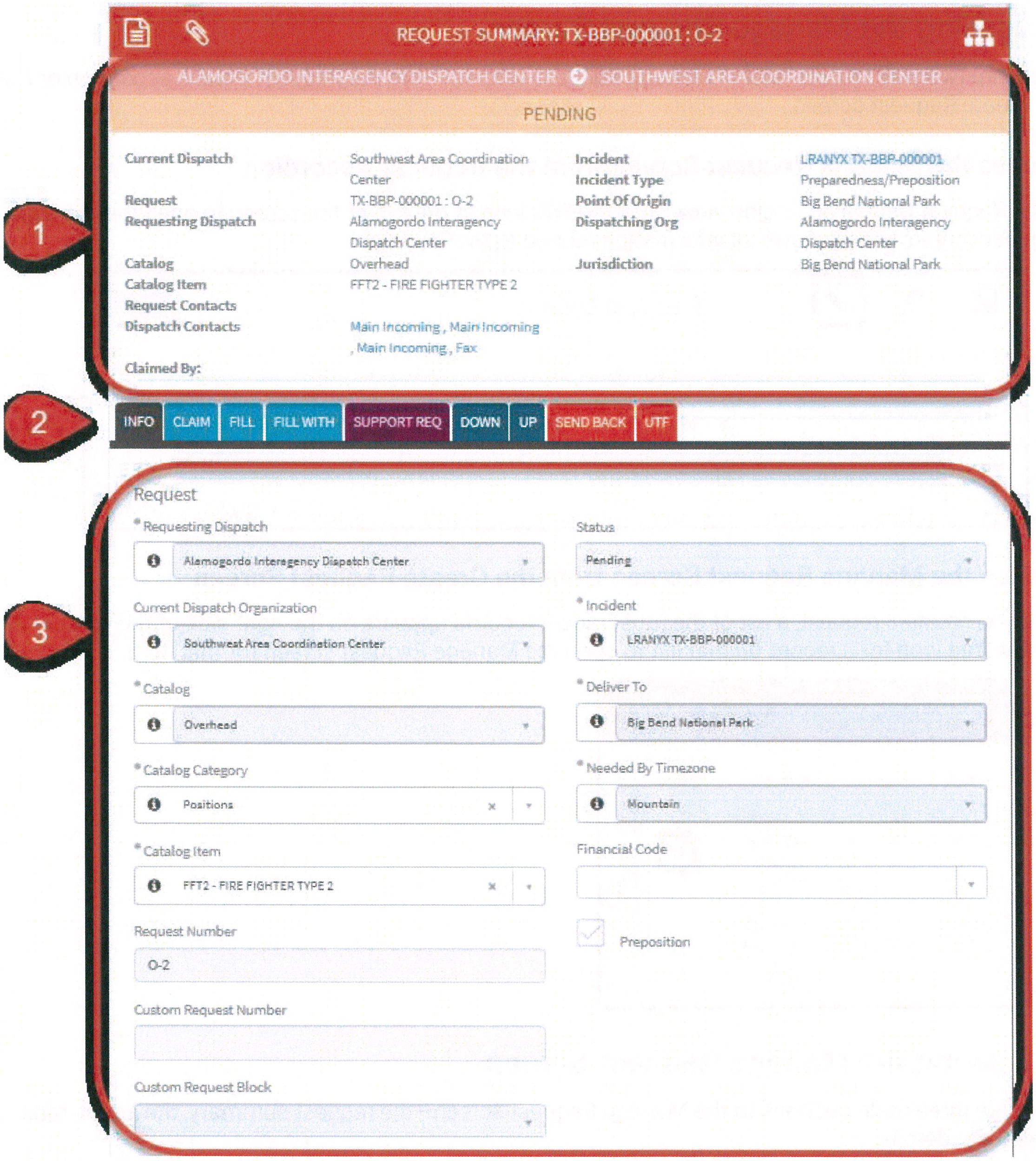
After you create a request, a list of the most recent records appears on the right side of the screen. Click the **Manage** icon for a record on that list to open the Manage Request screen for that item.



Navigating the Manage Request Screen

There are three main sections to the Manage Request screen—the request summary, the action tabs, and the request details.

Note: Because of space, the next page shows only the top portion of the Manage Request screen.



1 **Request Summary –** The request summary displays basic information about a request, including:

- Request Status (in the yellow bar)
- Current Dispatch Center
- Request Number
- Requesting Dispatch Center
- Catalog
- Catalog Item
- Request Contacts
- Dispatch Contacts
- Claimed By information

- Incident Name/Number
- Incident Type
- Incident Point of Origin
- Dispatching Organization
- Jurisdictional Unit

Tip: Click on blue text, such as for **Dispatch Contacts**, to see related details.

2 **Action Tabs –** The action tabs are based on the status of the request and the dispatch center you are logged into. Most of the work on a pending request happens on theses tabs.

- Claim
- Fill
- Fill With
- Support Req
- Down
- Up
- Direct
- Send Back
- Retrieve
- UTF
- Cancel UTF

Note: You will only see the tabs that are applicable to the status of the request and what you can do with that request.

3 **Request Details –** This section contains additional information about the request. The specific data elements displayed depend on the type of request selected. Unlike the Request Summary section, some fields in this section can be modified here.

Note: Grayed-out fields are read-only and cannot be modified.

6. Managing Requests in the Manage Request Screen

This section of the guide explains how to perform various actions on a request. For information on how to get to the Manage Request Screen, see Accessing the Manage Request Screen. For information on how to perform specific actions on multiple requests at once, see Managing Requests in Pending Requests List View.

Claiming a Request

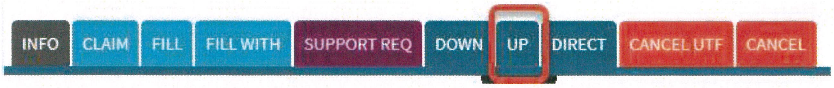
As a dispatcher, you may claim a request so that other dispatchers know you are working the request.

1 Navigate to the **Manage Request** screen for the request you want to claim.

2 Click on the **Claim** action tab to add the request to your claimed list.

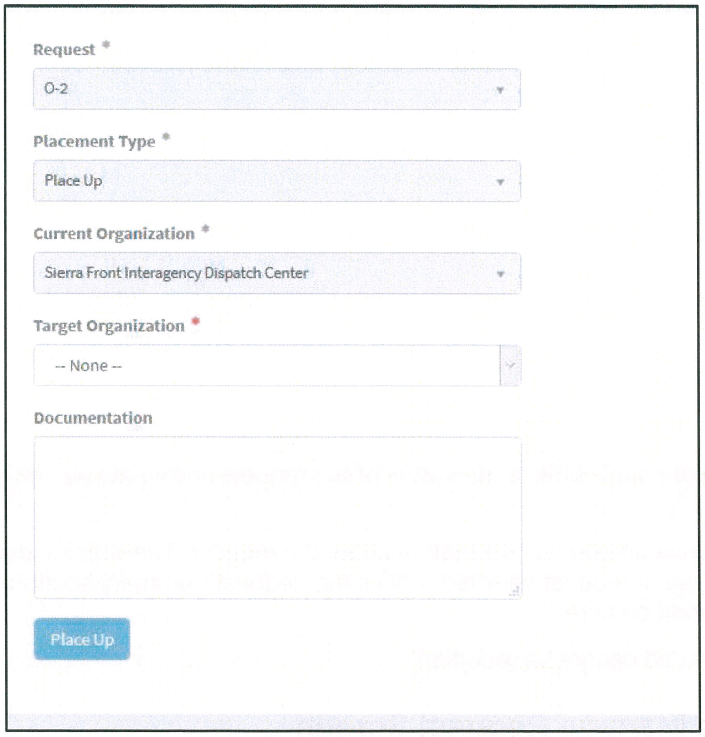
Placing Up

As a dispatcher, you may place a request up to your parent dispatch center using the **Up** tab on the **Manage Request** screen.



1 Navigate to the **Manage Request** screen for the request you want to place up.

2 Click on the **Up** tab to display the **Place Up** form in the Request Details section.



a Select the **Target Organization*** from the drop-down.

b Enter any necessary comments in the **Documentation** field.

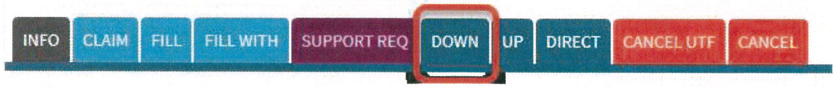
c When done, click **Place Up**.

Note: Keep the following in mind when you are placing requests:

- The **Up** tab will only become active if you have a parent dispatch center to which you can place the pending request.
- If a request was placed to you via a selection area, the selection area must have place up authority activated to place the request up to your parent.

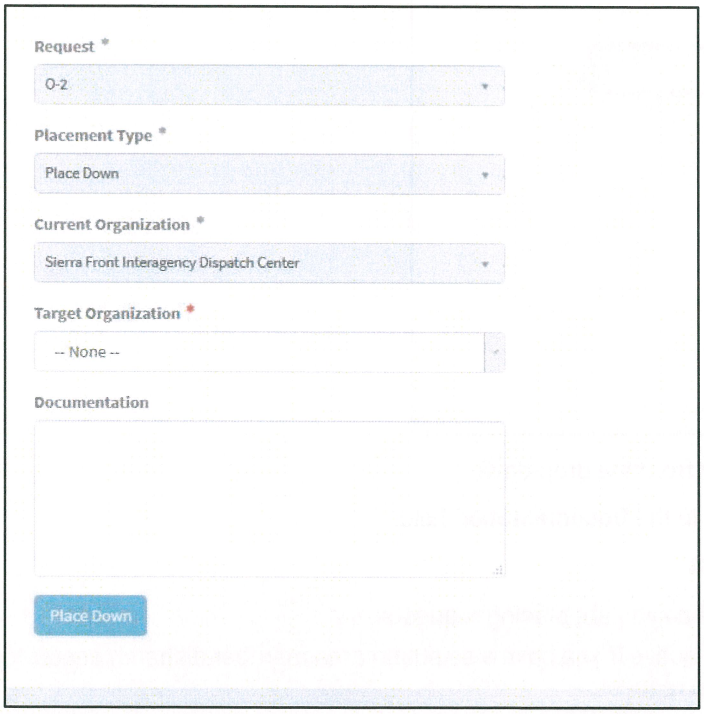
Placing Down

As a dispatcher, you may place a request down to one of your subordinate dispatch centers using the **Down** tab on the **Manage Request** screen.



1 Navigate to the **Manage Request** screen for the request you want to place down.

2 Click on the **Down** tab to display the **Place Down** form in the Request Details section.



a Select the **Target Organization*** from the drop-down.

b Enter any necessary comments in the **Documentation** field.

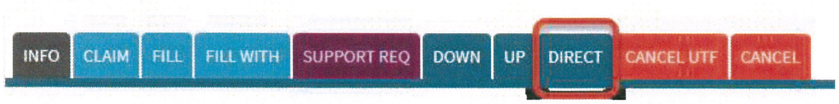
c When done, click **Place Down**.

Note: Keep the following in mind when you are placing requests:

- The **Down** tab will only become active if you have a subordinate dispatch center to which you can place the pending request.
- If a request was placed to you via a selection area, the selection area must have place down authority activated to place the request up to your parent.

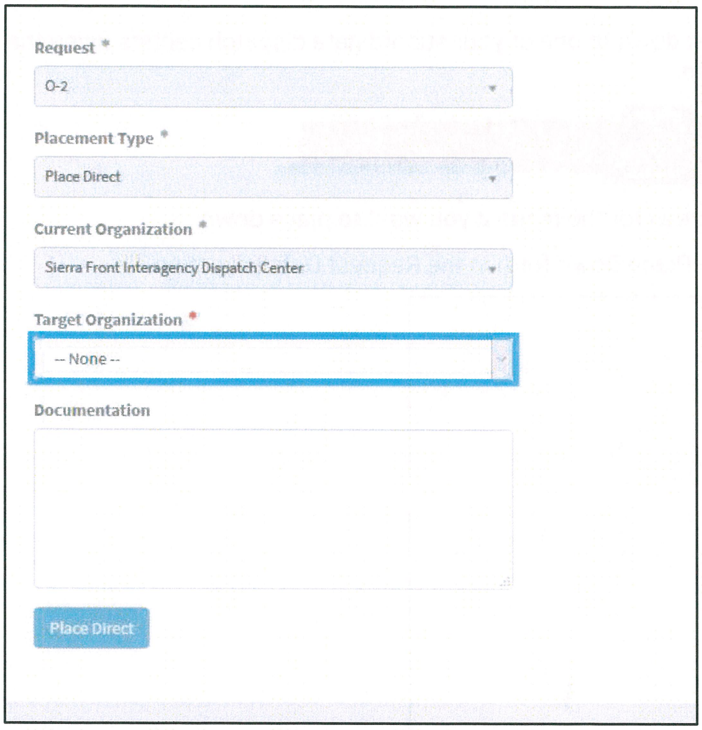
Placing Direct

As a dispatcher, you may place a request to one of your selection area members using the **Direct** tab on the **Manage Request** screen.



1 Navigate to the **Manage Request** screen for the request you want to place direct.

2 Click on the **Direct** tab to display the **Place Direct** form in the Request Details screen.



a Select the **Target Organization*** from the drop-down.

b Enter any necessary comments in the **Documentation** field.

c When done, click on **Place Direct**.

Note: Keep the following in mind when you are placing requests:

- The **Direct** tab will only become active if you have a selection area member dispatch center to which you can place the pending request.
- If a request was placed to you via a selection area, the selection area must have place direct authority activated to place the request up to your parent.

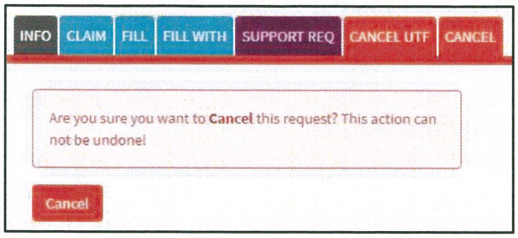
Canceling a Request

As a dispatcher, you may need to cancel a request so that it can no longer be filled with a resource.

1 Navigate to the **Manage Request** screen for the request you want to cancel.

2 Click on the **Cancel** action tab.

3 IROC will present a confirmation message to confirm the cancel.



4 After you confirm, IROC will cancel the request and remove it from the **Pending Requests** list.

> **Note:** Keep the following in mind when you are cancelling requests:
> - The **Cancel** tab will only appear if the request is pending at your dispatch center and your dispatch center is the requesting dispatch center on the request.
> - If the request has subordinate requests, all subordinate requests must be pending, canceled, or cancel UTFed.
> - If the request has subordinate requests, all pending subordinate requests are canceled once the parent is canceled, and the request's assignment roster is deleted once the parent is canceled.

UTF a Request

As a dispatcher, if you are unable to fill (UTF) a request, you can return it to the dispatch center that placed it to you.

1 Navigate to the **Manage Request** screen for the request you want to UTF.

2 Click on the **UTF** action tab.

3 IROC will present a confirmation message to confirm the UTF.

4 After you confirm, IROC will send the request back to the dispatch center that placed it to you, mark it as unable to fill (UTF), and place it on that dispatch center's **Pending Request** list.

> **Note**: Keep the following in mind when you are canceling requests because they were unable to be filled:
> - The **UTF** tab will only appear if the request is pending and it was placed to your dispatch center.
> - If the request has subordinate requests, all subordinate requests must be pending, canceled, or cancel UTFed.
> - If the request has subordinate requests, all pending subordinate requests are cancel UTFed once the parent is cancel UTFed, and the request's assignment roster is deleted once the parent is cancel UTFed.

Canceling a Request Because You Are Unable to Fill (Cancel UTF)

As a dispatcher, you may cancel UTF a request so you can indicate that a need exists for the resource but the request was unable to be filled due to a lack of resources.

1 Navigate to the **Manage Request** screen for the request.

2 Click on the **Cancel UTF** action tab.

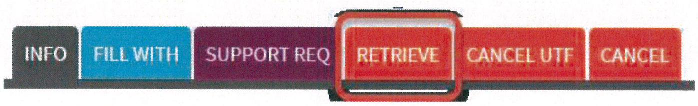
3 IROC will ask that you confirm the cancel UTF.

4 Once you confirm, IROC will cancel the request and remove it from the **Pending Requests** list.

> **Note**: Keep the following in mind when you choose to Cancel UTF:
> - The **Cancel UTF** tab will only appear if your dispatch center is the requesting dispatch center on the request and the request is pending at your dispatch center.
> - If the request has subordinate requests, all subordinate requests must be pending, canceled, or cancel UTFed.
> - If the request has subordinate requests, all pending subordinate requests are cancel UTFed once the parent is cancel UTFed, and the request's assignment roster is deleted once the parent is cancel UTFed.

Retrieving a Request

As a dispatcher, you may retrieve a request for which you are in the ordering chain so you can recall the request from the dispatch center it was placed to without that dispatch center having to UTF the request.



1 Navigate to the **Request Status** screen for the request you want to retrieve.

2 Click on the **Retrieve** action tab.

3 IROC will retrieve the request and place it on your **Pending Requests** list.

> **Note:** Keep the following in mind when you are retrieving requests:
> - Requests you can retrieve appear on the **Request Status** list. To navigate to the **Request Status** list, clicking on **Request Status** on the Request Status action tile on the IROC homepage.
> - The **Retrieve** tab will only appear if the request you are retrieving is pending at another dispatch center and your dispatch center is in the ordering chain for the request.
> - If the request has support requests controlled by your dispatch center, you'll need to disposition those support requests.
> - If the request has support requests not controlled by your dispatch center, IROC will send a notification to the controlling dispatch center(s), notifying them that the parent request has been retrieved.

Sending Back a Request

As a dispatcher, you may need to send an incorrectly placed request back to the dispatch center that placed it to you.

1 Navigate to the **Manage Request** screen for the request you want to send back.

2 Click on the **Send Back** action tab.

3 IROC will send the request back to the dispatch center that placed it to you and place the request on that dispatch center's **Pending Request** list.

> **Note**: Keep the following in mind when you are retrieving requests:
> - The **Send Back** tab will only appear if the request you are sending back is pending at your dispatch center.

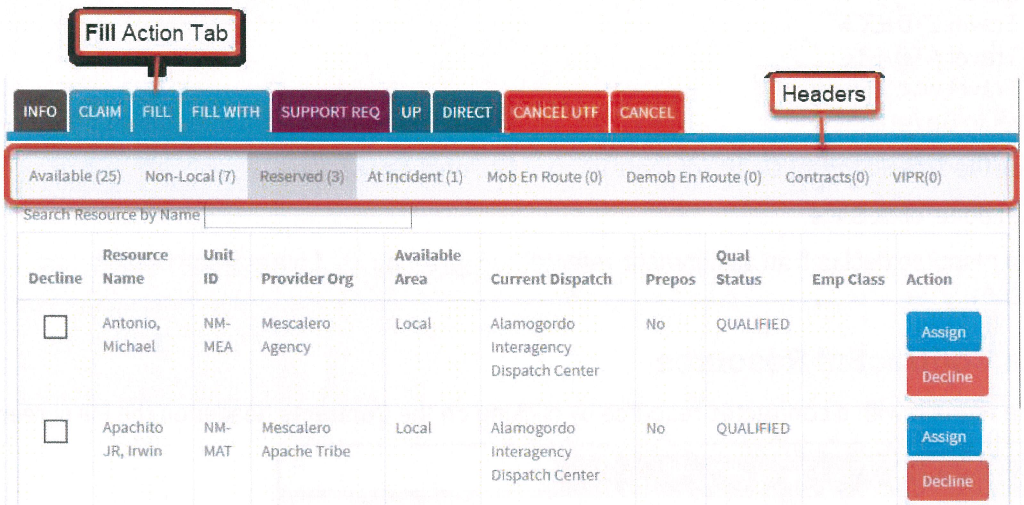
- If the request has support requests controlled by your dispatch center, you'll need to disposition those support requests.
- If the request has support requests not controlled by your dispatch center, IROC will send a notification to the controlling dispatch center(s), notifying them that the parent request has been retrieved.

7. Filling a Request

Most pending request actions take place on the Manage Request screen. To fill a request, you will click on the **Fill** or **Fill With** action tab in the Request Details section of the Manage Request screen. In the **Fill** tab, you will see a series of headers that show the count of resources available to fill the request. Click on a header to assign a resource to a request. The **Fill With** tab allows you to fill with non-local inventory or other similar options.

Fill with a Resource from Available and Reserved Status

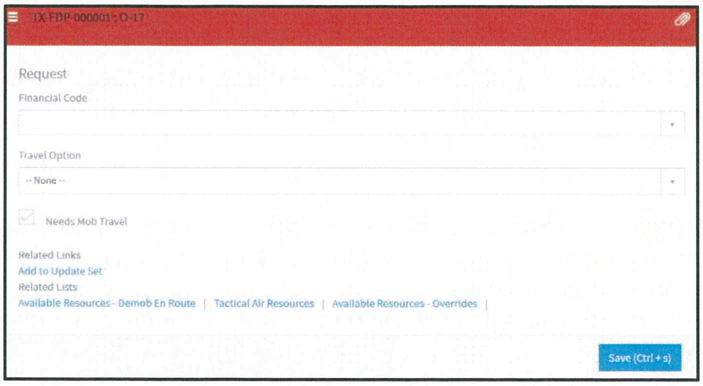
In the **Fill** tab, click the **Available** header to see available, local resources; click the **Non-Local** header to see available, non-local resources; or click the **Reserved** header to see reserved resources that can be reassigned to the current request.



1. Navigate to the **Manage Request** screen for the request you want to fill.
2. Click on the **Fill** action tab.
3. Click the **Available, Non-Local,** or **Reserved** header, depending on what you are looking for.
4. Click the **Assign** action button for the resource you want to assign.

Tip: You can use the **Search Resource by Name** field if needed to find the desired resource.

5 IROC presents the Incident Request screen.



a *Optional:* Select a **Financial Code** for the assignment.

b You must select a **Travel Option*** from the drop-down.

Valid Travel Options

- No Travel
- Set Travel ETD/ETA
- Set Travel ATD/ETE
- Set Travel with Itinerary
- Travel to Be Arranged

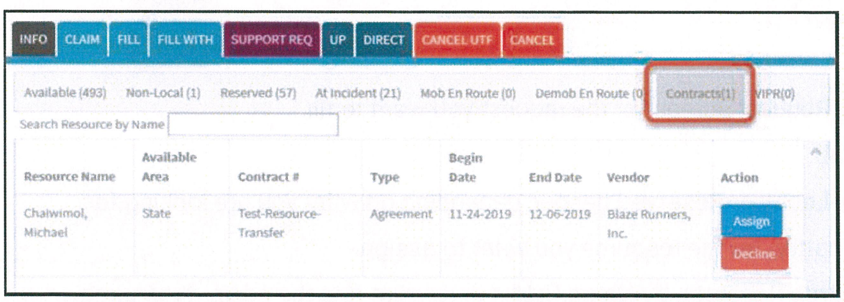
Note: See the *Travel Student Guide* for more information on these options.

c When done, click **Save**.

Note: If a resource declines an assignment, refer to Documenting That a Resource Declined an Assignment.

Fill with a Contracted Resource

You may fill a request with a contracted resource by clicking on the **Contracts** header on the Fill screen.



1 Navigate to the **Manage Request** screen for the request you want to fill.

2 Click on the **Fill** action tab.

3 Click the **Contracts** header and search for the required resource.

4 Click the **Assign** action button for that resource.

5 In the Incident Request screen, set the **Financial Code**, if needed, and the required **Travel Options.** (See Fill with a Resource from Available and Reserved Status, Step 5.)

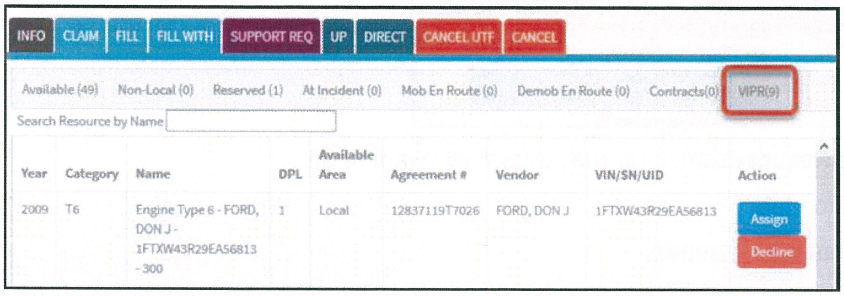
Note: See the *Travel Student Guide* for more information on these options.

6 When done, click **Save**.

> **Note:** Your dispatch center must have direct access to the contract to see resources available for assignment.
>
> **Note:** If a resource declines an assignment, refer to Documenting That a Resource Declined an Assignment.

Fill with a VIPR Resource

You may fill a request with a VIPR resource by clicking on the **VIPR** header on the Fill screen.



1 Navigate to the **Manage Request** screen for the request you want to fill.

2 Click on the **Fill** action tab.

3 Select the **VIPR** header and search for the required resources.

4 Click the **Assign** action button for that resource.

5 In the Incident Request screen, set the **Financial Code**, if needed, and the required **Travel Options.** (See Fill with a Resource from Available and Reserved Status, Step 5.)

> **Note:** See the *Travel Student Guide* for more information on these options.

6 When done, click **Save**.

> **Note:** Your dispatch center must have direct access to the contract to see resources available for assignment.
>
> **Note:** If a resource declines an assignment, refer to Documenting That a Resource Declined an Assignment.

Documenting Reasons for a DPL Bypass

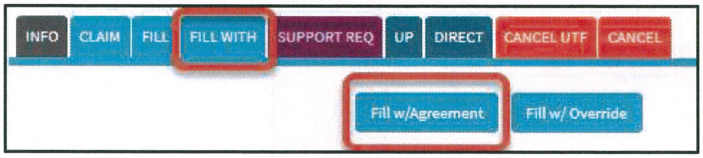
The resources shown on the VIPR Fill screen are listed according to their Dispatch Priority List (DPL). You are required to assign available resources according to their priority on the DPL list. If you must assign a lower-priority VIPR resource, you are required to provide a reason for bypassing the DPL. You may also provide a detailed explanation of the bypass reason.

> **Note:** The DPL Bypass Reasons available on the drop-down are:
>
> - Attribute required on request
> - Cannot meet date and time needed
> - Government discretion for effective response
> - Host agency policy
> - Initial attack of incident
> - Resource displaying is unavailable
> - Resource not at identified location per agreement
> - Resource unavailable per contract with contractor

- Tribal preference policy
- Unable to contact contractor
- Contractor declined assignment
- Other

Fill with a Non-Inventory Agreement Resource

Fill with agreement is used to fill a request with a resource that is not in the inventory. Non-inventory resources are temporary resources that are not added to the IROC inventory.

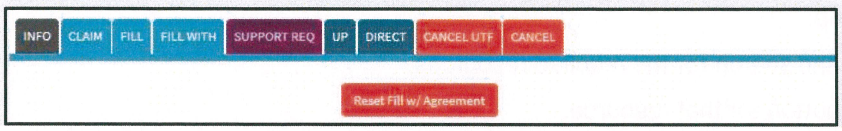


1 Navigate to the **Manage Request** screen for the request you want to fill.

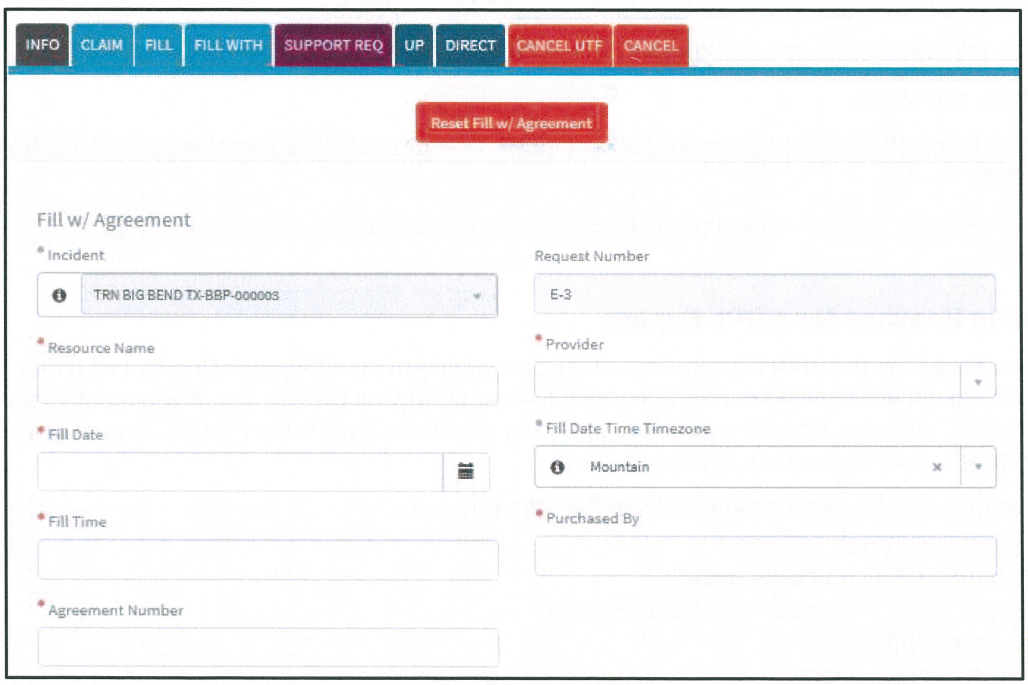
2 Click on the **Fill With** action tab.

3 Click the **Fill w/Agreement** action button.

Note: After clicking **Fill w/Agreement**, if you decide you don't want to fill the request with agreement, click **Reset Fill w/Agreement** and select another fill option.



4 Complete all required fields and any other relevant information in the Fill w/Agreement form.



Note: Due to the size of the screenshot, we have not shown the entire screen here.

Note: The information in this screen will vary depending on the selected resource.

5 When done, click **Save**.

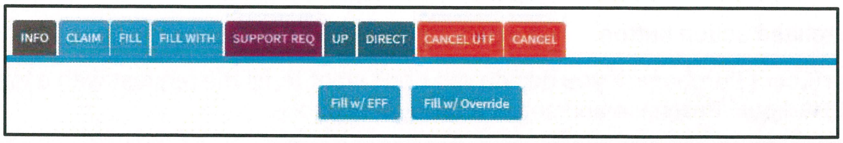
6 Once you have completed filling the request, click **Complete Fill w/Agreement**.

Note: Keep the following in mind when filling with agreement:

- When a non-inventory agreement is used to fill a request, no IROC resource items are being assigned. However, your dispatch becomes the "home dispatch" of the temporary non-inventory resource until it is released.
- Non-inventory agreement resources do not have to be checked in upon completion of their assignment; thus, they do not become statused as "returned from assignment." Requests filled with non-inventory agreement resources are closed when the demobilization ETA is reached.
- On requests for supply items that are in the catalog, the **Resource Name** field displays the catalog item name and cannot be changed.

Fill with a Non-Inventory EFF/AD Resource

As a dispatcher, you may fill a request with a non-inventory EFF/AD (emergency fire fighter / administratively determined) resource.

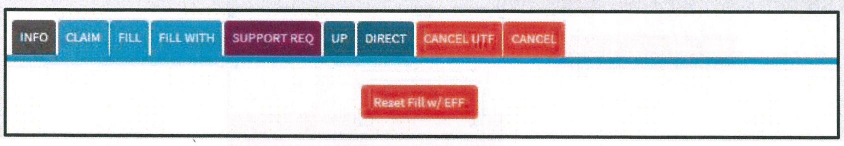


1 Navigate to the **Manage Request** screen for the request you want to fill.

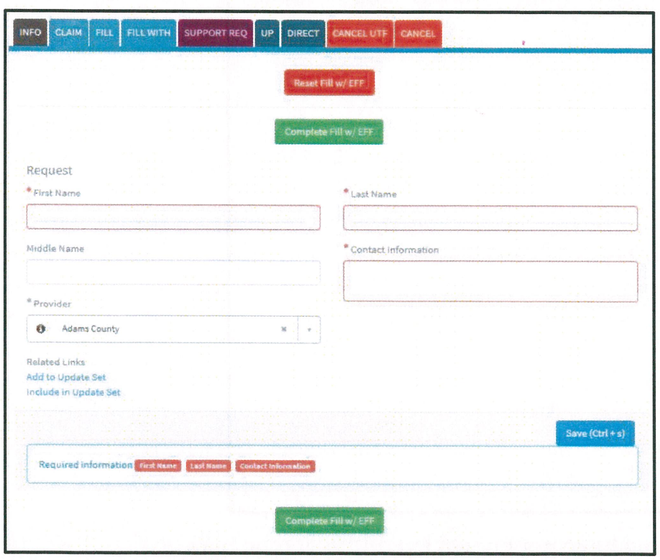
2 Click on the **Fill With** action tab.

3 Click the **Fill w/EFF** action button.

Note: After clicking **Fill w/EFF**, if you decide you don't want to fill the request with an EFF/AD resource, click **Reset Fill w/EFF** and select another fill option.



4 Complete all required fields and any other relevant information in the Request form.



5 When done, click **Save**.

6 Once you have completed filling the request, click **Complete Fill w/EFF**.

> **Note**: Keep the following in mind when filling a request with an EFF/AD resource:
> - The request must be for an overhead catalog item.
> - The requested item must not be a service and it cannot have a configuration.

Fill with a Local Purchase

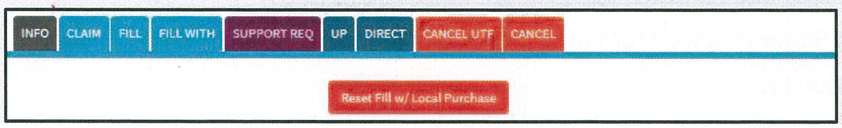
As a dispatcher, you can fill a request with a local purchase.

1 Navigate to the **Manage Request** screen for the request you want to fill.

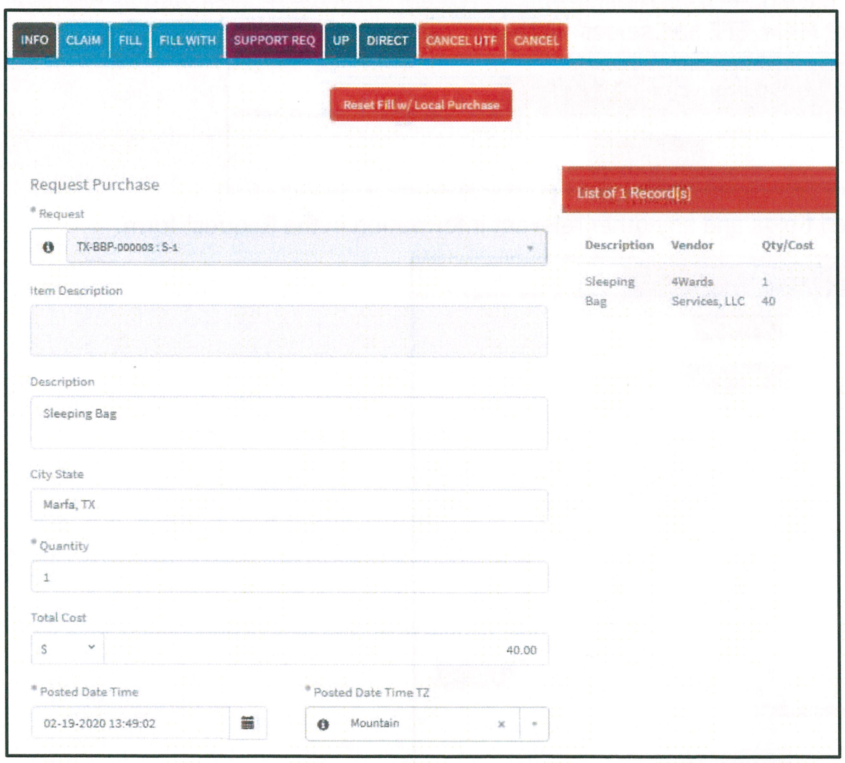
2 Click on the **Fill With** action tab.

3 Click the **Fill w/Local Purchase** action button.

> **Note:** After clicking **Fill w/Local Purchase**, if you decide you don't want to fill the request with a local purchase, click **Reset Fill w/Local Purchase** and select another fill option.



4 Complete all required fields and any other relevant information in the Request Purchase form.



> **Note:** Due to the size of the screenshot, we have not shown the entire screen here.

5 When done, click **Save**.

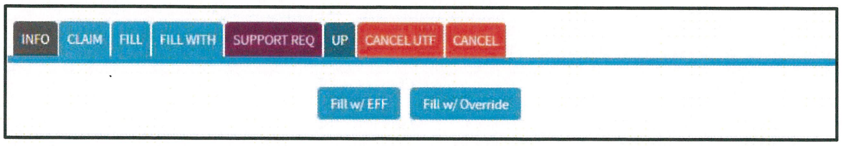
> **Note:** When you save the fill information, a record is created and displayed in the **List of Records** on the right side of the screen.

6 Once you have completed filling the request, click **Fill the Request**.

> **Note:** When filling with a local purchase, keep in mind that if you choose to track the item, you will need to set travel. (See the *Travel Student Guide* for more information.)

Fill with Override

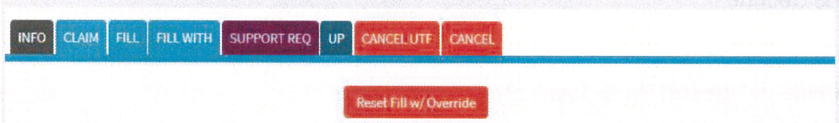
As a dispatcher, you can fill a request using the override so that you can override inclusions and exclusions on the request.



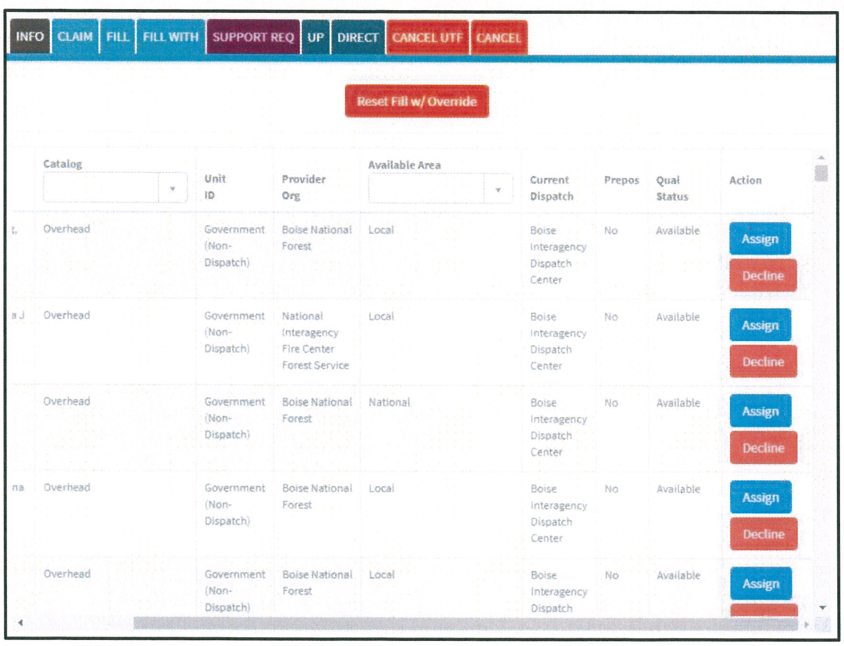
1 Navigate to the **Manage Request** screen for the request you want to fill.

2 Click on the **Fill With** action tab.

3 Click the **Fill w/Override** action button.

> **Note:** After clicking **Fill w/Override**, if you decide you don't want to fill the request with override, click **Reset Fill w/Override** and select another fill option.
>
> 
>

4 Click the **Assign** button for the appropriate record. **IROC** fills the request with the resource you identified.



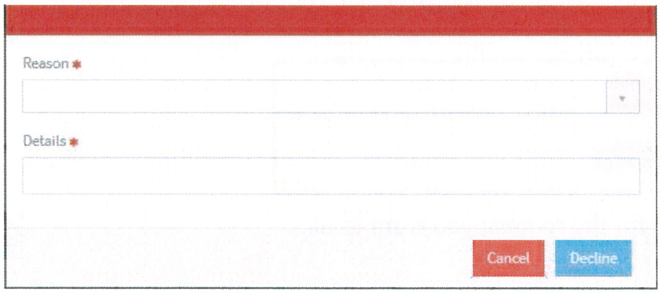
Tip: You may need to use the scroll bar at the bottom of the screen to see the **Assign/Decline** action buttons.

Note: You can set travel for the resource on this assignment by clicking on the **Travel** tab. (See the *Travel Student Guide* for more information.)

Note: If a resource declines an assignment, refer to Documenting That a Resource Declined an Assignment.

Documenting That a Resource Declined an Assignment

As a dispatcher, you may need to document that a resource declined an assignment.



1 In the Resource list, click **Decline** for the resource that declined the assignment.

2 In the pop-up screen, select a **Reason** from the drop-down list.

3 Add **Details** explaining the decline.

4 Click **Decline**.

Note: Valid reasons available in **Reason** drop-down are:

- Cannot meet date and time needed
- Resource displaying not available
- Declined assignment
- Unable to contact
- Other

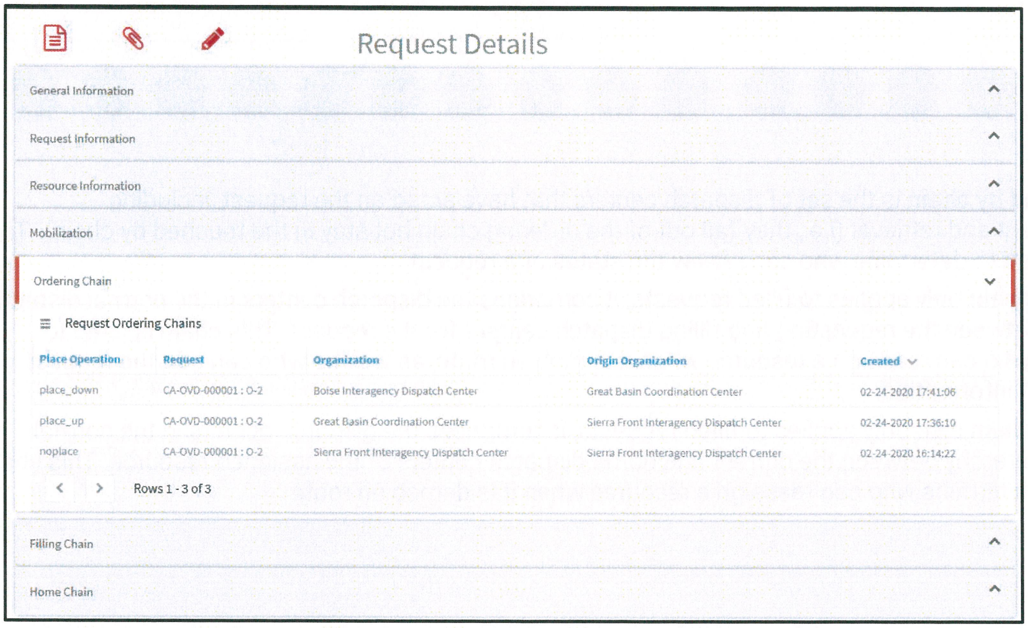
8. View Ordering Chain Information for a Request

As a dispatcher, you may need to see request ordering chains for a request.

1 Navigate to the Request Status list in the work area from either the Pending Requests or the Request Status action tile.

2 Double-click on a request to open the Request Details screen.

3 Open the **Ordering Chain** tab in the accordion view.



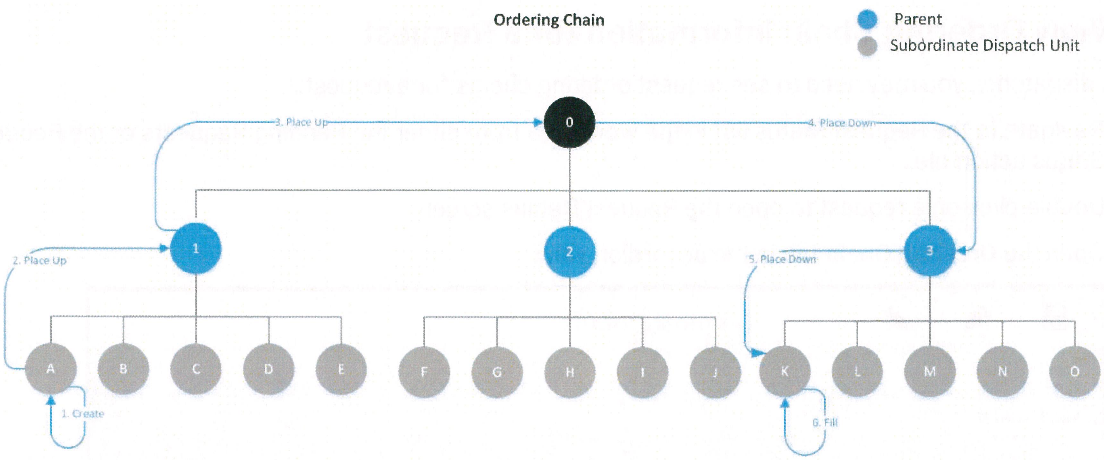
9. Request Chain Overview

Request chain business rules dictate which dispatch centers can view and take action on a particular request. Request chains include the ordering chain, touched by chain, filling chain, and home chain.

The **ordering chain** is the set of dispatch units that have created, placed, or filled the request or reassigned a resource from the request. This chain is used for the following:

- Determine which dispatch centers can view the status of a request
- Retrieve a pending request from another dispatch center
- Manage (view, create, or edit) a resource's travel on the request
- Add documentation to the request
- Receive notification messages regarding the request
- Receive notifications regarding the incident the request is associated with for both local and non-local incidents.

In the example below, Dispatches A, 1, 0, 3 and K are members of the ordering chain for this request. Note that certain actions result in dispatch centers falling out of the ordering chain. For example, If Dispatch 1 were to retrieve the request, Dispatches 0, 3, and K would fall out of the request's ordering chain.



The **touched by chain** is the set of dispatch centers that have acted on the request, including reassignment and retrieval (i.e., they fall out of the ordering chain but stay in the touched by chain). This chain is used to determine who can review the status of a request.

The **filling chain** only applies to filled requests; it comprises the dispatch centers in the normal dispatch hierarchy between the requesting and filling dispatch centers for the request. This chain is used to determine who can reassign a resource when it is mob en route, as well as who can edit the request assignment information.

The **home chain** also only applies to filled requests; it comprises the dispatch centers in the normal dispatch hierarchy between the current and home dispatch centers of the assigned resource. This chain is used to determine who can reassign a resource when it is demob en route.

Basic IROC Training: Student Guide

Request Status

Contents

1 Objectives

Upon completion of this unit, you will be able to:

- View the status of multiple and single requests in IROC.
- Edit a request.
- Edit an assignment.
- Unfill a request.
- Retrieve a request

2 Request Status Overview

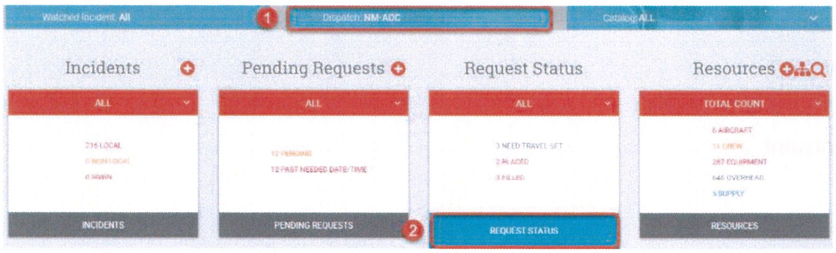
Requests status is the state of requests that have been created or placed to your dispatch center. It can be used to determine the status of an individual request or to provide information on groups of requests for briefings or shift changes. Possible resource statuses include:

- At Incident
- At Preposition – Available
- At Preposition – Committed)
- Canceled
- Canceled UTF
- Canceled-Merged
- Closed
- Closed Due to Merge
- Complete
- Deleted
- Draft
- Ferry
- Fill/Close
- Filled
- Merged
- Partial Fill
- Pending
- Reassigned
- Reassigned Due to Merge
- Reassignment Cancelled Due to Merge
- Released
- Tentative Release
- UTF (Unable to Fill)

This guide describes how dispatchers can view and set resource status within IROC, as well as how to view the details associated with a resource.

Example Scenario: Dispatcher Nancy wants to see a quick view of which requests need travel. To do this, she navigates to Request Status list view and clicks the **Needs Mob Travel** and **Needs Demob Travel** actin buttons. She then receives a request for further information on a request with status UTF. She clears the travel filters and choose **UTF** from the **Status** column drop-down. If necessary, Nancy can click the **Download** icon to export the filtered list to a PDF report or Excel spreadsheet format.

3 Viewing Request Status



1 In IROC Portal, select the appropriate dispatch center from the **Dispatch** content selector.

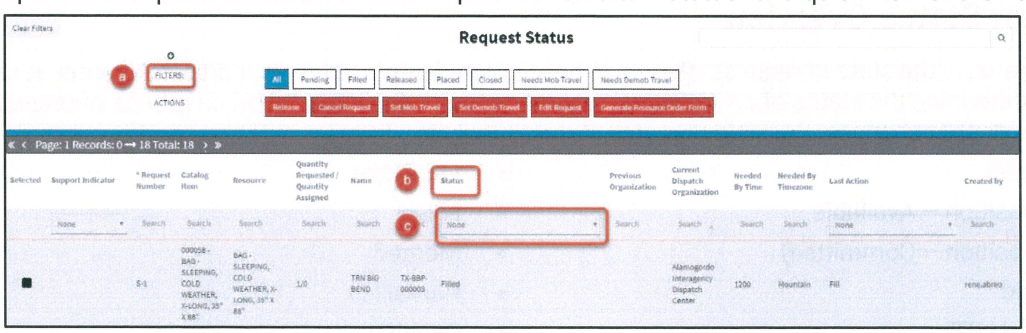
2 Click the **Request Status** list selector on the Request Status Action Tile to open the work area.

> **Note:** You can also view status and manage requests from the **Pending Requests** tile; however, you will only see pending requests.

Options for Viewing Request Status

In the work area, you have several options for seeing the status of a request.

1 In the default list view, there are several ways to filter the request status column. This is a good option if a dispatcher needs to list all requests of a certain status for a quick view of their operations.



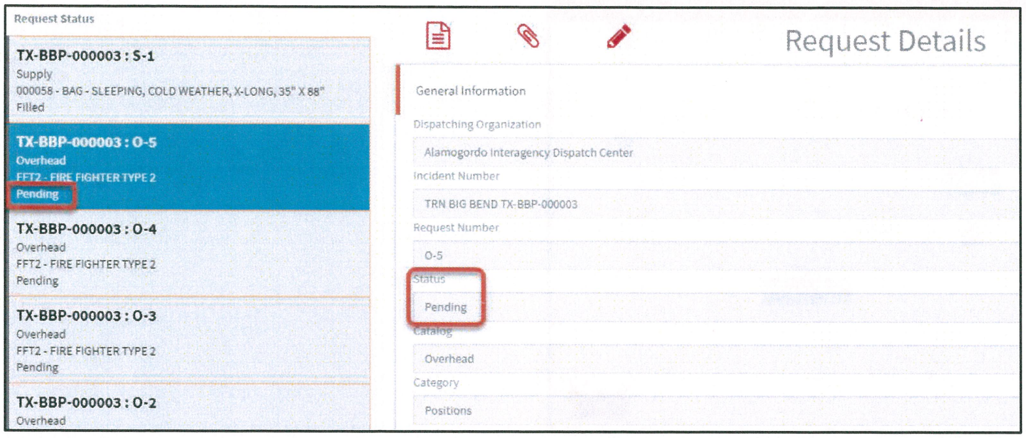
a Click on one or more quick filters. Selected options are blue; unselected options are white. To remove a quick filter, click it again. To revert to the default view, click **All** to see all.

b Click on the status column header to sort the items in the field in ascending or descending alphabetical order.

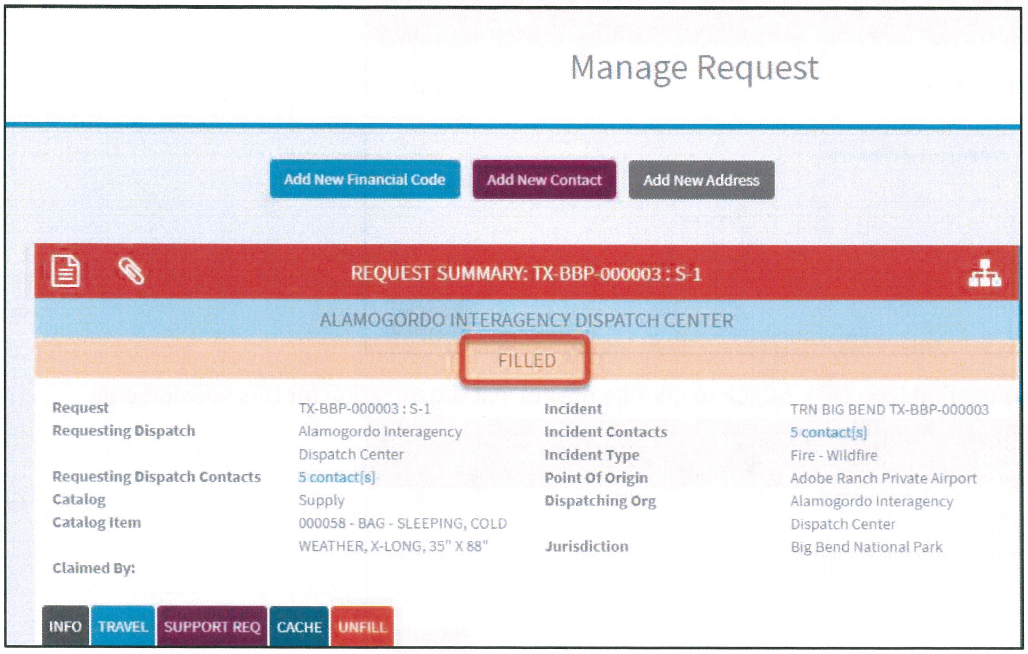
c Select a status from the Status column drop-down to filter the list to show only items that match your criteria.

> **Tips:**
>
> - To create a report or to export the filtered list, click the **Download** ( ) icon to export the information to PDF or Excel formats.
> - You can also use a wildcard search in the **Search** field in the upper-right corner of the screen to search for a specific status.

2 Double-click on a request in the list to move to **a**ccordion view. In accordion view, the status is listed in the list on the left and in the **Status** field of the General Information tab on the right.



3 Clicking on the **Edit** icon in accordion view moves you to the Manage Request screen, where the request status is indicated in a yellow bar at the top of the screen.



4 Editing a Request/Assignment

Editing a request or assignment is handled in the Manage Request screen.

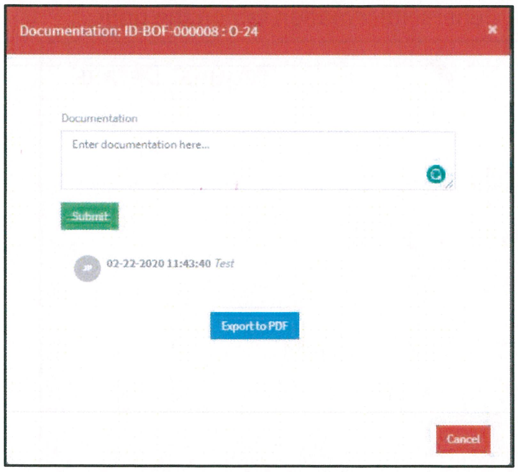
Example Scenario: Dispatcher Nancy needs to modify some information in a request from her dispatch center. She locates the request in Request Status list view and clicks on the request to see details in accordion view. From this view, she clicks the **Edit** icon to open the Manage Request screen, where she can add and modify information.

1 Navigate to the **Manage Request** screen for the request you want to modify.

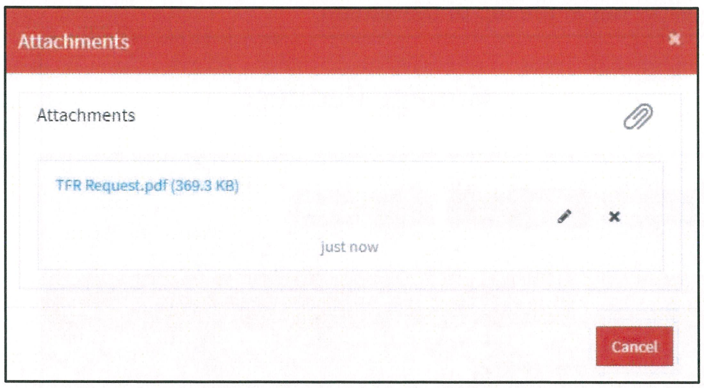
2 The available fields and action tabs will vary depending on the request type and status. For any request, you can perform the following actions by clicking on one of these icons:

Note: The **Documentation** and **Attach** icon are also available from the Request Status work area.

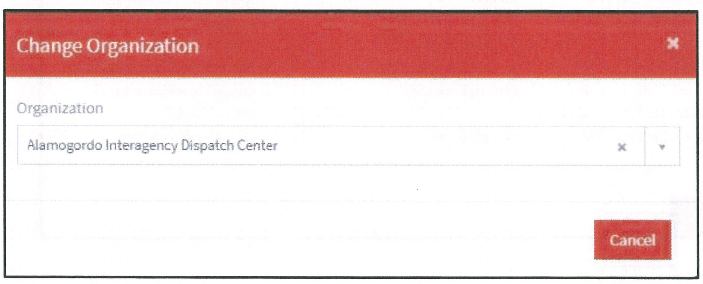
a **Documentation icon** ( ) – Click to add a comment/journal entry to the record.



b **Attach icon** ( ) – Click to attach a document to the record.

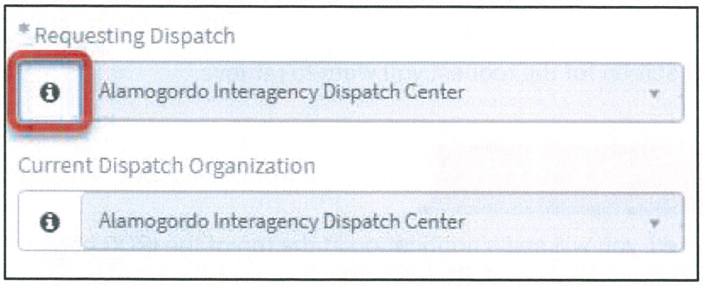


c **Organization icon** ( ) – Click to change the current organization for this session only.



Note: Any organizations to which you have access will appear in the drop-down.

d **Information icon** (ℹ) – Click the information icon shown adjacent to some fields to view the source record for this field.



3 Click on an action tab to open the related form and make the needed changes. For example, to change the travel for a request, click the **Travel** tab. To modify general information related to the request, click the **Info** tab.

Note: The tabs shown will differ depending on the request status.

4 When done, click **Save**.

Note: All items marked with an asterisk (*) in IROC are required.

Tip: Unless otherwise noted, you can type directly in each field. In drop-down menus, IROC will perform a type-ahead search to narrow down the choices in the list.

Note: Any fields that are grayed out are read only and cannot be edited for this record and user.

5 Unfilling a Request

Example Scenario: Dispatcher Nancy needs to unfill a request that is already filled. She searches for the request in list view and clicks on the request to move to accordion view. She then clicks the **Edit** icon to open the Manage Request screen. Here she clicks the **Unfill** tab.

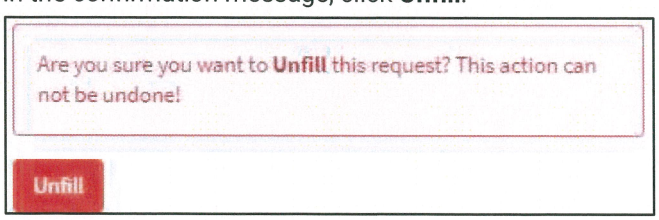
When you unfill a request, it becomes pending with your dispatch.

1 Navigate to the **Manage Request** screen for the request you want to unfill.

Note: For a request to be unfilled, it must have a Filled status.

2 Select the **Unfill** tab.

3 In the confirmation message, click **Unfill**.



6 Retrieving a Request

This function retrieves a placed request where your dispatch is in the ordering chain. The request must be pending.

1 Navigate to the **Manage Request** screen for the request you want to retrieve.

2 Click on the **Retrieve** tab.

3 Once the request has been retrieved, you will see a notification at the top of the IROC page.

Note: Keep in mind the following when retrieving a request:

- A request can only be retrieved if it has already been placed to a different organization.
- The request cannot have an open assignment roster.
- You cannot retrieve the request if your dispatch UTFed the request.

Basic IROC Training: Student Guide

Assignment Rosters

Contents

1. Objectives

Upon completion of this unit, you will be able to:

- Fill a request using an assignment roster
- Manage roster items on a request
- Fill nested rosters

2. Assignment Rosters Overview

An assignment roster is created when filling a request that has a configuration. That request is called the *parent request*. You work with the assignment roster to generate the subordinate requests for the parent request.

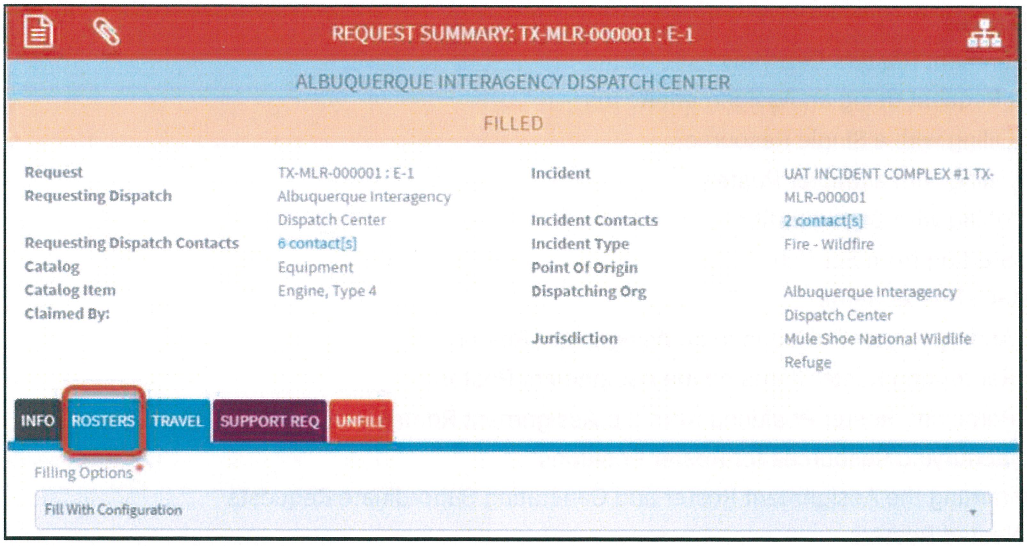
> **Example:**
>
> An Engine Type 6 is defined in the IROC catalog as having a configuration.
>
> That configuration is defined as an Engine, Type 6, plus one Engine Operator and two Fire Fighter Type 2s.
>
> The final assignment roster would have a single parent request for the engine, a subordinate request for the engine operator, and two more subordinate requests, one for each firefighter.

To generate the assignment roster, you first have to fill the parent (the Engine, Type 6, in our example). You then have the option of filling the configuration.

> **Note:** Because of the Agile development used to create IROC, some of the screenshots, action buttons, and filters described here will be different from what you may see in the IROC instance you are viewing.

3. Fill a Request Using an Assignment Roster

When you fill a request for an item that has a configuration, IROC presents the **Rosters** tab on the Manage Requests screen, allowing you to create an assignment roster and generate the subordinate requests. Click on this tab to see the **Filling Options*** drop-down.



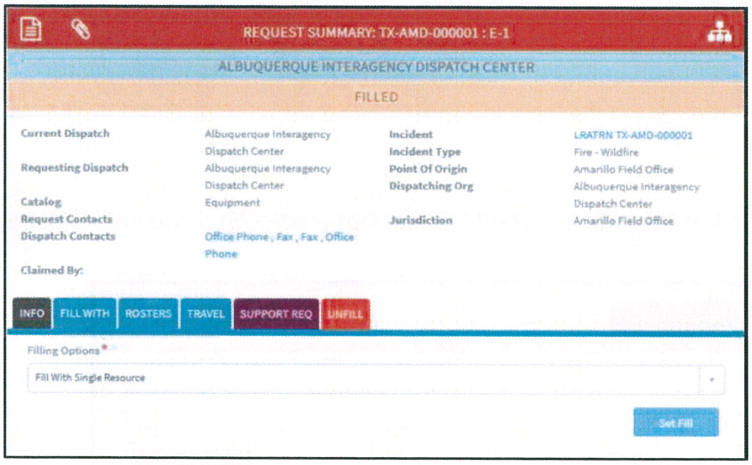
On the **Rosters** tab, you can choose from the following four filling options:

- **Fill with Single Resource –** After filling with a single resource, no further action is needed.
- **Fill with a Master Roster –** Choose this to fill the request with one of the resource's master rosters, if any exist, to get a set of roster positions, all or some of which have resources identified.
- **Fill with Configuration –** Fill the request using the catalog configuration associated with the requested item to have a starting set of roster positions with no resources identified.
- **Start from Scratch –** Start a new assignment roster from scratch so you can add the roster positions and identify the resources for each based on your needs.

> **Note:** Regardless of which method you use to generate the assignment roster, you can add, reorder, and remove assignment roster positions on the **Roster** tab.
>
> **Note:** To fill a request using an assignment roster, the parent request must be filled. The yellow status bar at the top of the screen shows that this request is filled. If this said "Pending," you would need to fill the request before proceeding.

Filling with a Single Resource

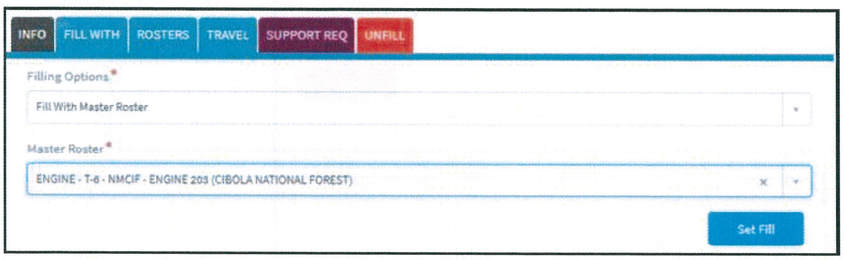
1 On the **Rosters** tab, select **Fill With Single Resource** from the **Filling Options** drop-down.



Filling with a Master Roster

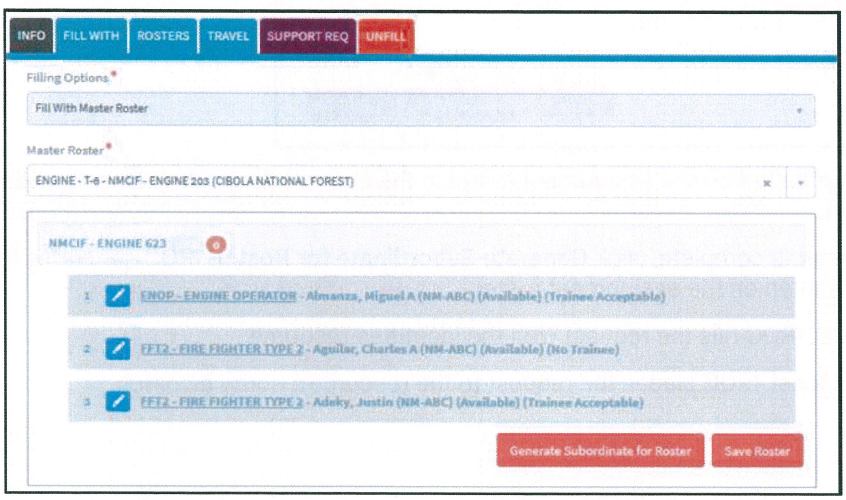
1 On the **Rosters** tab, select **Fill With Master Roster** from the **Filling Options*** drop-down.

2 Select the resource's master roster from the **Master Roster*** drop-down and click **Set Fill**.



Note: If the resource has no master rosters, the drop-down list will be empty.

3 IROC populates the assignment roster with the roster positions and their associated resources.



4 Once the assignment roster is complete, click **Generate Subordinate for Roster**. IROC generates the subordinates for each position on the assignment roster.

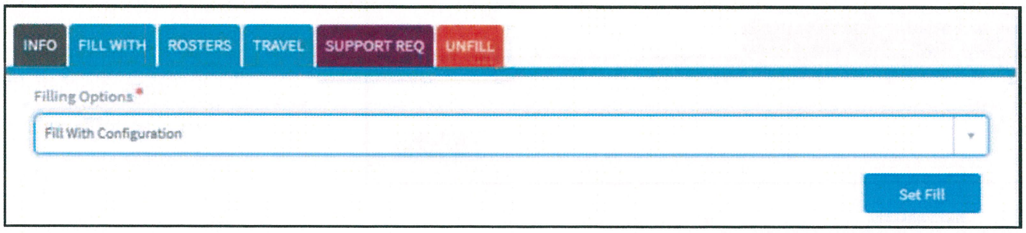
a If the resource is local, IROC fills the request with the identified resource.

b If the resource is not local, IROC places the request to the resource's home dispatch.

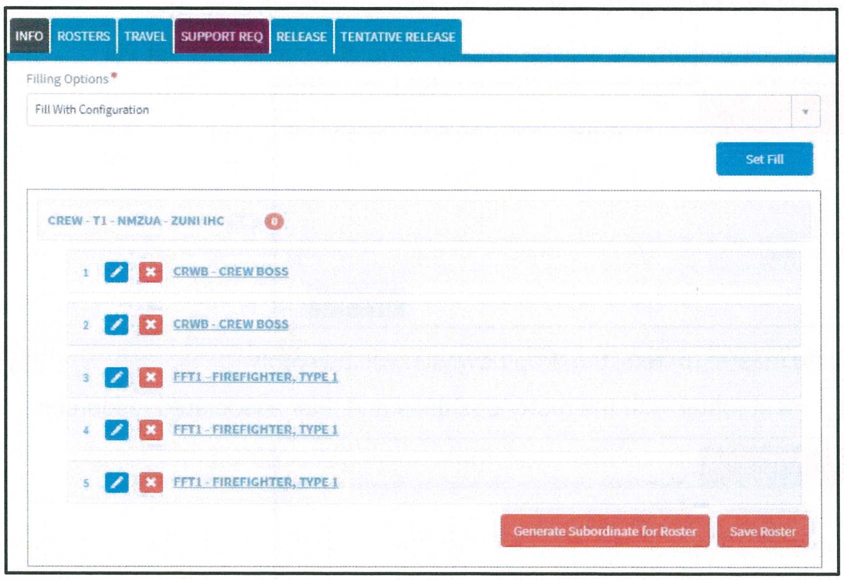
Note: The roster positions for which you generated subordinate requests are committed and cannot be edited or reordered after you take this action. However, you can add additional roster positions below these on the assignment roster and generate subordinate requests for those new roster positions.

Filling with Configuration

1 In the **Rosters** tab, select **Fill With Configuration** from the **Filling Options*** drop-down and click **Set Fill**.



2 IROC populates the assignment roster with the items from the resource's catalog configuration.



Note: These items are numbered on the assignment roster in the same order as they are numbered in the catalog configuration.

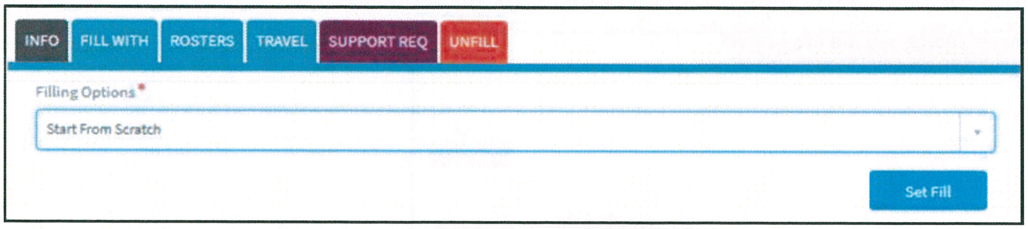
3 Once the assignment roster is complete, click **Generate Subordinate for Roster**. IROC generates the subordinates for each position on the assignment roster.

a If the resource is local, IROC fills the request with the identified resource.

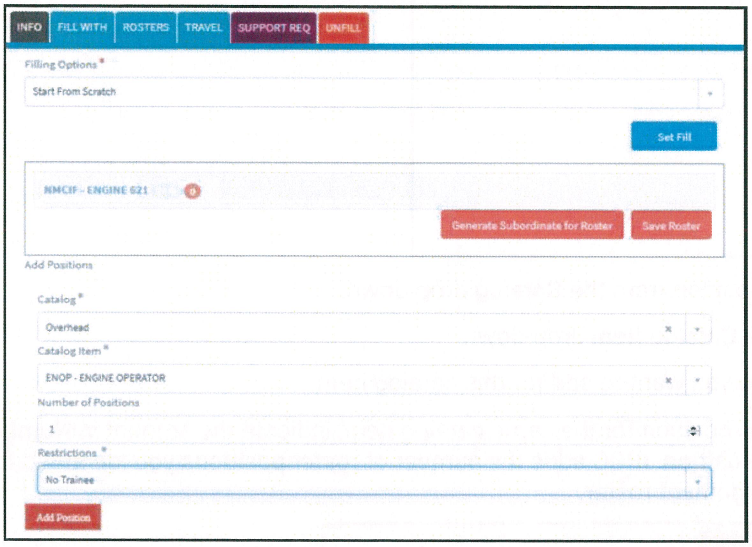
b If the resource is not local, IROC places the request to the resource's home dispatch.

Starting from Scratch

1 On the **Rosters** tab, select **Start From Scratch** from the **Filling Options** drop-down and click **Set Fill**.



2 IROC displays a blank assignment roster to which you can add roster positions.



Note: For more information, see Adding Roster Positions to an Assignment Roster.

4. Manage Roster Items

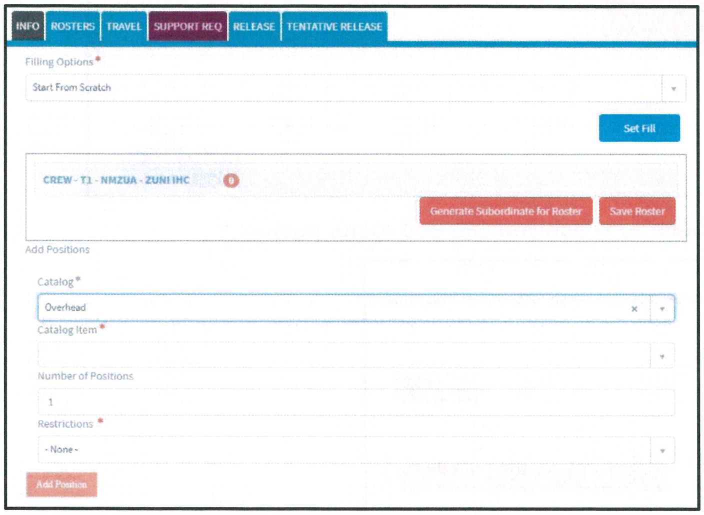
After creating an assignment roster, you can add or remove positions, reorder positions on the roster, assign resources to a position, and commit the roster to generate subordinate requests.

Notes: IROC allows you to manage assignment rosters regardless of the method used to generate the initial assignment roster. It's important to keep the following in mind:

- You can add, remove, and reorder roster positions any time before generating the subordinate requests for the assignment roster.
- When editing an assignment roster for which you've already generated subordinate requests, you can add positions below the committed positions, but you cannot rearrange or reorder committed positions. Nor can you insert new positions within committed positions.

Adding Roster Positions to an Assignment Roster

1 Navigate to the **Rosters** tab for the parent request for which you want to manage the assignment roster. IROC displays the current assignment roster for the request.

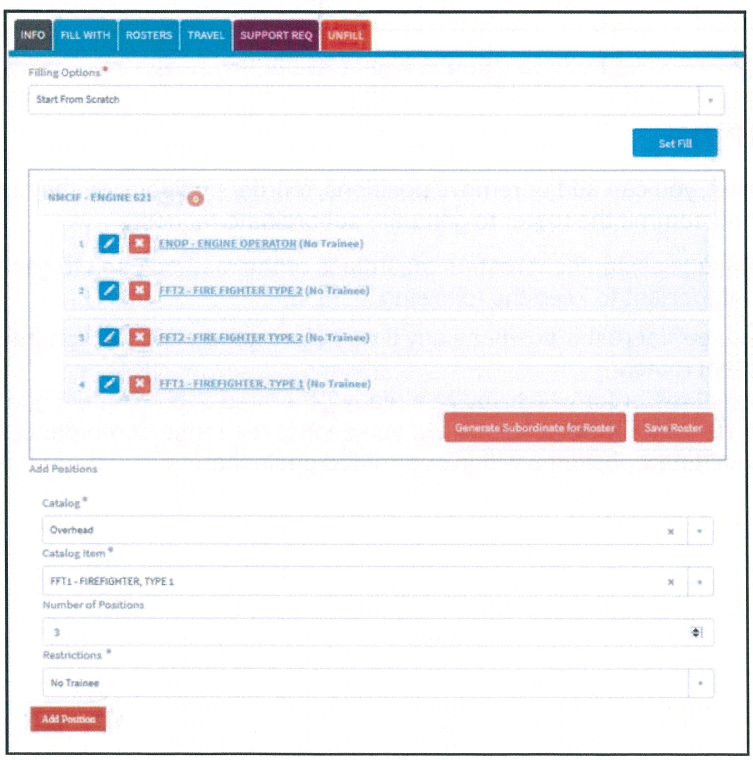


2 Select the catalog for the new position from the **Catalog** drop-down.

3 Select the catalog item from the **Catalog Item** drop-down.

4 Identify the **Number of Positions** you want to add for this catalog item.

a To add more than one roster position for the same catalog item, indicate the amount in **Number of Positions** and click **Add Position**. IROC adds the number of roster positions you identified for that catalog item to the assignment roster.



5 Select the training restrictions from the **Restrictions** drop-down, if applicable.

Note: The **Restrictions** drop-down only appears for certain catalog items.

6 Click **Add Position**.

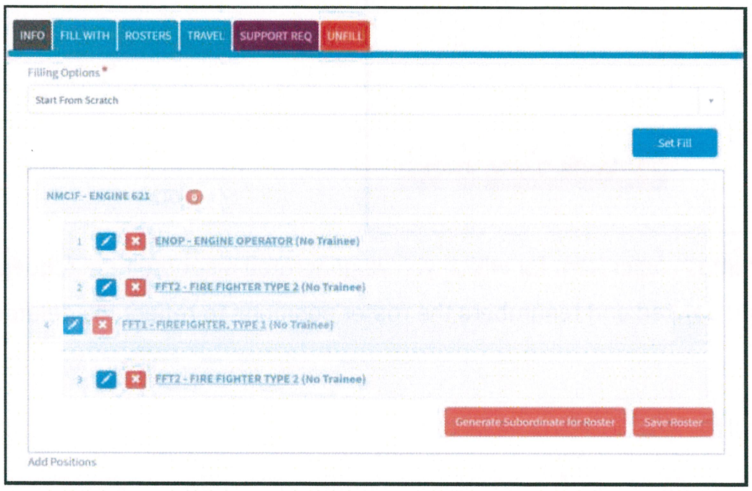
7 IROC adds the roster position to the assignment roster.

Note: You can edit or delete the new position, but you cannot move it to precede existing positions.

Reordering Roster Items on the Assignment Roster

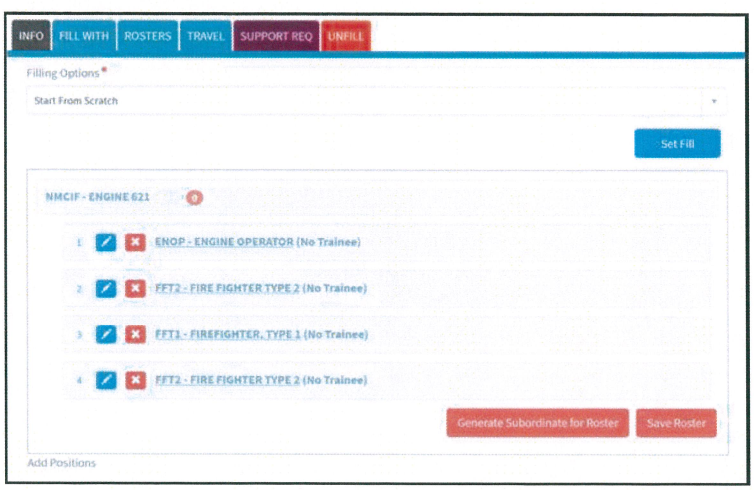
1 Navigate to the **Rosters** tab for the parent request for which you want to manage the assignment roster. IROC displays the current assignment roster for the request.

2 Click and drag to move the roster position where you would like it placed on the assignment roster.



Note: You cannot reorder committed roster positions for which you've generated subordinate requests.

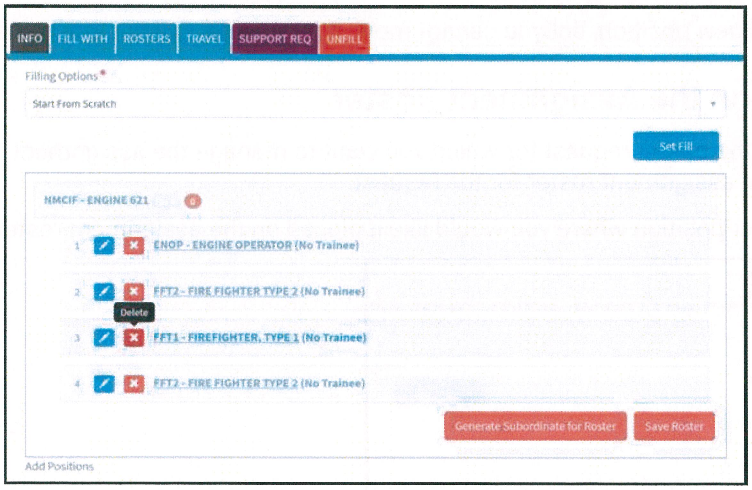
3 IROC renumbers the roster positions to represent the new order, as indicated by the numbers to the left of each position.



Removing Roster Positions from the Assignment Roster

1 Navigate to the **Rosters** tab for the parent request for which you want to manage the assignment roster. IROC displays the current assignment roster for the request.

2 Click the **Delete** icon ( ) beside the item you want to remove.

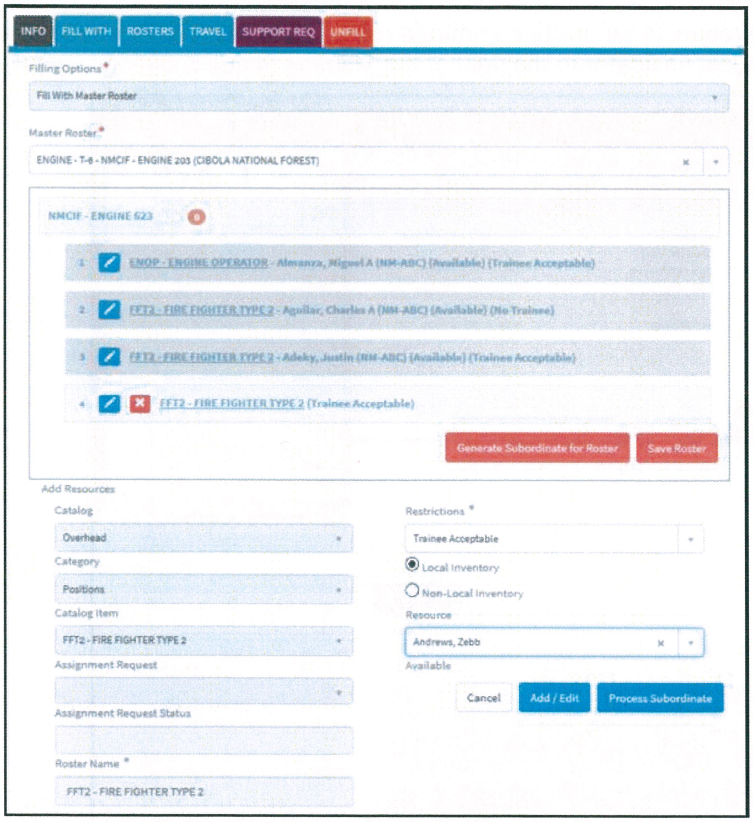


Note: You cannot delete a committed roster item for which you've generated a subordinate request.

3 IROC removes the roster item you deleted and renumbers the roster positions to reflect the deleted roster position.

Identifying Resources for Roster Positions

1. Navigate to the **Rosters** tab for the parent request for which you want to manage the assignment roster. IROC displays the current assignment roster for the request.
2. Click the **Edit** icon ( ) beside the roster position for which you want to identify a resource. IROC displays the Add Resources screen.



3. Adjust the restrictions, if needed, by selecting from the **Restrictions** drop-down.

Note: The **Restrictions** drop-down only appears for certain resources.

4. Select either the **Local Inventory** or **Non-Local Inventory** radio button.

Note: Selecting **Local Inventory** limits your search to only those resources local to your dispatch center. Selecting **Non-Local Inventory** brings up the Dispatch drop-down, where you can choose another dispatch center and search for resources from across the community.

5. Select a resource from the **Resource** drop-down and click **Add/Edit**. IROC adds the resource you identified to the roster position on the assignment roster.

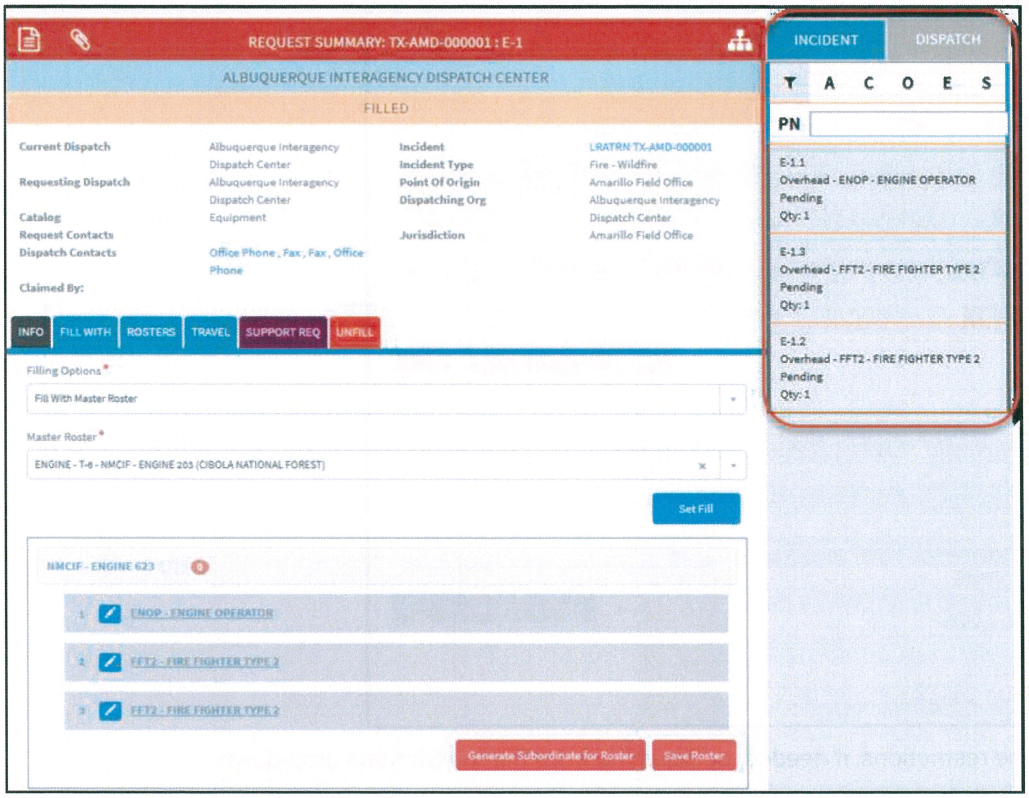
Note: You can choose to commit this position and generate subordinates for the uncommitted roster positions, or you can continue adding, reordering, and/or removing more roster positions on the assignment roster.

5. Committing the Assignment Roster and Generating Subordinate Requests

1 Navigate to the **Rosters** tab for the parent request for which you want to manage the assignment roster. IROC displays the current assignment roster for the request.

2 Click **Generate Subordinate for Roster**.

3 IROC generates the subordinate requests for any uncommitted roster positions. You can see these subordinate requests on the request navigator to the right of the Manage Request screen.



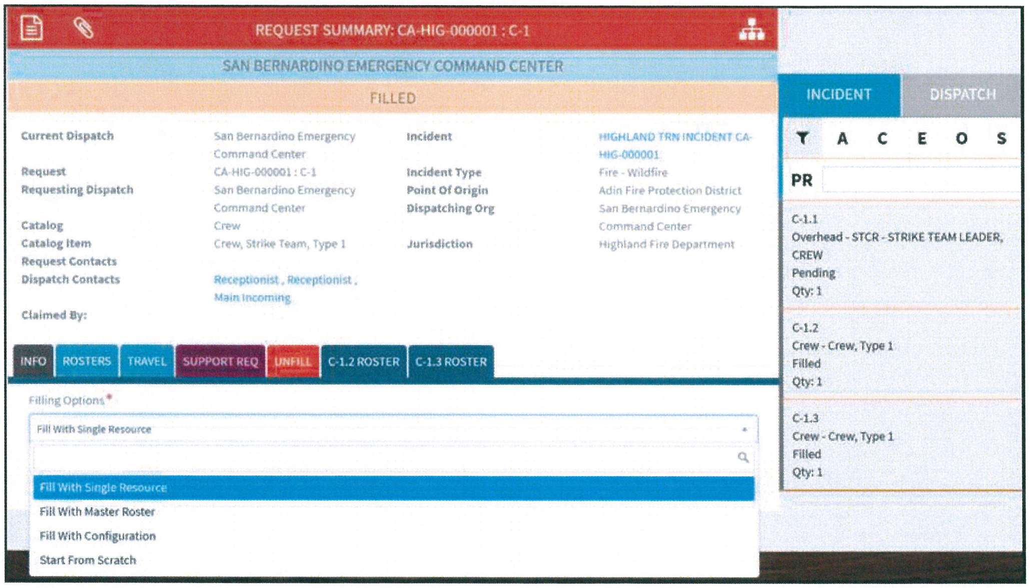
Note: IROC locks the committed roster positions and restricts any further editing. IROC also only generates subordinate requests for uncommitted roster positions.

Tip: In the request navigator, you can filter by catalog or pending requests by clicking on one or more of the letters: **A** = aircraft, **C** = crew, **O** = overhead, **E** = equipment, **S** = Supply, and **PR** = Pending Request. To remove all filters, click the **Filter** icon. You can also click on **Dispatch** to see all requests for your dispatch center or **Incident** to see all requests for the selected incident.

6. Fill Nested Rosters

Nested rosters, such as those found on strike teams, are built using the same procedure used to build the roster on the parent. Each subordinate that has a configuration displays in a tab numbered the same as the request number. In the example below, C-1.2 in the list on the right is a crew. When you navigate to the nested roster, you have the same filling options available on the parent configuration.

Once you generate an assignment roster for the nested roster, you can generate the subordinates. The assignment roster for the nested roster(s) will be available so you can add subordinates at this level. The same rules that apply to the parent roster apply to each nested roster.



Basic IROC Training: Student Guide

Maintaining Rosters

Contents

1. Objectives

Upon completion of this unit, you will be able to:

- Create a roster in IROC.
- Add positions to a roster.
- Modify existing positions on a roster.
- Manage the roster list.

2. Rosters Overview

A roster is a list of resources attached to a parent request or resource, based on a predetermined configuration, as defined by an NWCG configuration and the resources that fill each position in the configuration. The standard NWCG configuration for a Type 3 Helicopter Module, for example, is a manager and two crew members. A roster for this module would consist of the three positions and the names of the people filling them. For example, HMGB—Bill Adams, HECM—Bradley Hutton, and HECM—Allison James.

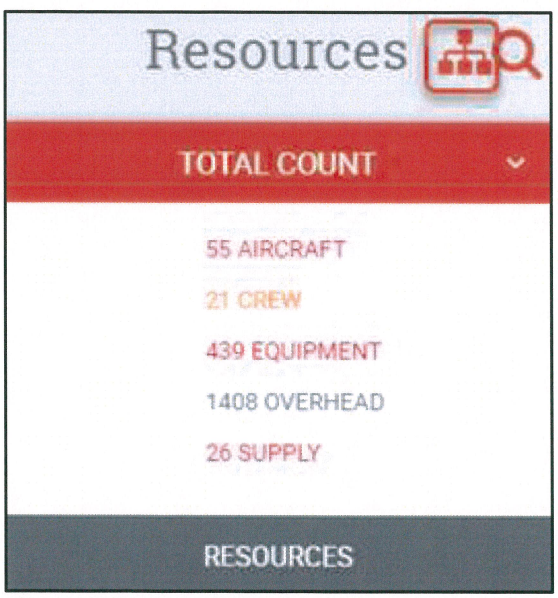
This guide describes how dispatchers can create and maintain rosters within IROC.

3. Creating a New Roster

Example scenario: Nancy is a dispatcher within the Boise Interagency Dispatch Center. She needs to create a roster from scratch in IROC. In the Roster screen, she chooses **Create New Roster** and selects Crew from the **Catalog** field. In the **Method of Creation** field, she chooses **Create From Scratch**. Nancy chooses CREW-T1-BOISE-IHC as the **Resource Name**. IROC populates the **Roster Name** with the resource name. Nancy clicks **Create Roster** to complete the process. Her roster appears on the right, and the screen on the left now defaults to **Edit Existing Roster**.

Let's walk through the steps used by Nancy to create this roster.

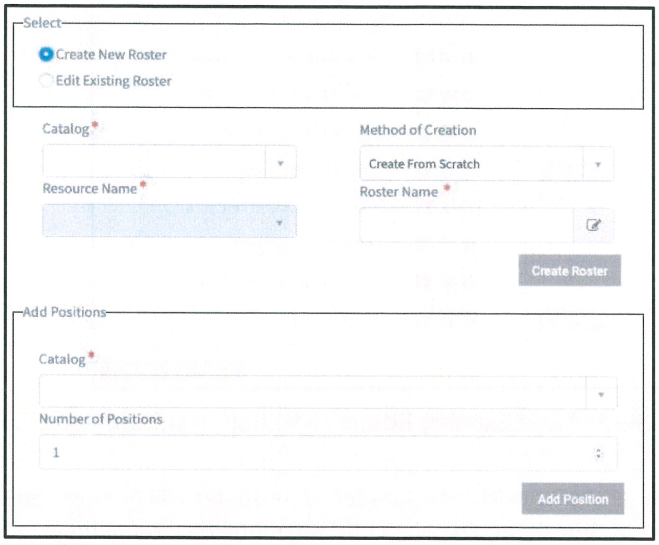
1 On the IROC homepage, click the **Roster** action icon in the Resources tile to open the Roster screen.



Note: All items marked with an asterisk (*) in IROC are required. Red (darker shading) asterisks indicate fields that still need to be filled; gray asterisks (lighter shading) are complete.

Note: Unless otherwise noted, you can type directly in each field. In drop-down menus, you can perform a type-ahead search to narrow down the choices in the list.

2 Make sure the **Create New Roster** radio button is selected.



Note: This view is the default after clicking the **Rosters** icon on the Resources tile.

3 Select a **Catalog*** category: Aircraft, Crew, Equipment, or Overhead.

4 Select a **Resource Name***.

Note: Items in the **Resource Name** drop-down are filtered by the selected catalog.

5 Select the **Method of Creation**.

a **Create From Scratch** – Create a new roster for the resource.

b **Create From Master Roster** – Create a new roster using resources from an existing roster; select an existing **Master Roster*** from the drop-down that appears after selecting this option.

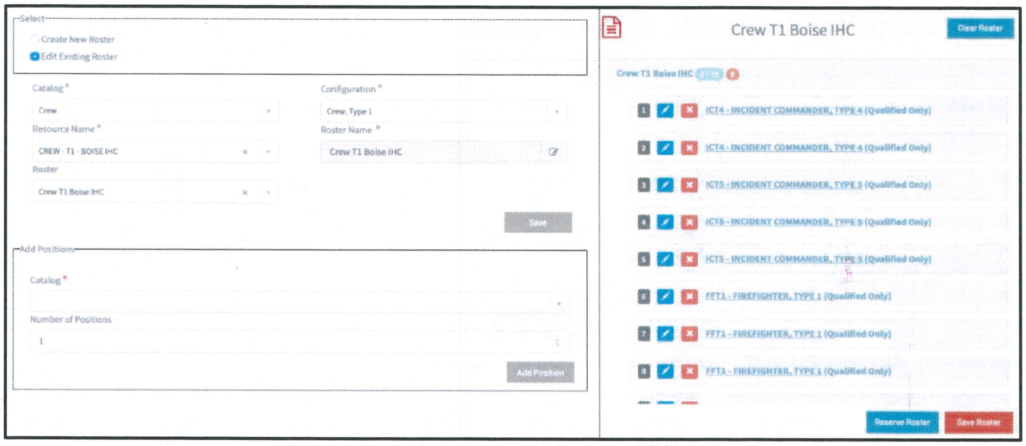
Note: The **Create From Master Roster** option will not appear in the drop-down if a master roster is not available for the chosen resource.

c **Create From Configuration** – Create a new roster using an existing configuration; select a **Configuration*** from the drop-down that appears after selecting this option.

6 IROC defaults **Roster Name*** to the resource item name. To rename the roster, simply type in the field. The roster name must be unique.

Tip: If the **Roster Name** field is grayed out, click the **Edit** icon to make it active and then type in the field.

7 Click **Create Roster**. Your roster appears on the right side of the screen, with the roster name showing at the top. In this screenshot, **Create From Configuration** was chosen.



Note: The left side of the screen now shows the **Edit Existing Roster** radio button selected and includes the information for the roster.

Note: When creating a roster using a master roster or a configuration, your roster will be populated with positions, as shown on the right side of the screen. You can add positions as described in Maintaining a Roster.

4. Maintaining a Roster

Example scenario: Nancy wants to add a transport bus to her roster. She searches for and opens the roster. In the Add Positions pane, she chooses **Equipment** from the **Catalog** drop-down. In the **Catalog Item** field, she types "bus" to populate the list with all entries with "bus" in the title; she chooses **Transportation, Bus, Crew Carrier**. Because she needs two buses, she selects two positions. When done, she clicks **Add Position.** She also needs to add two drivers to the roster; to do this, she chooses **Overhead**, and types "driver" in the **Catalog Item** field until she sees the type of driver she wants. She chooses **DRVB – Driver Class B**, two positions, and Qualified Only. Nancy then clicks **Add Position**. She then clicks **Save Roster** on the right side of the screen to save her work.

Finding an Existing Roster

1 To modify an existing roster, click on the **Rosters** icon in the Resources action tile on the IROC homepage.

2 In the Roster screen, click the **Edit Exiting Roster** radio button.

3 Choose the **Catalog*** to which the roster belongs.

4 Select the **Resource Name*** from the drop-down.

5 Select the **Roster** from the available items in the drop-down. The **Roster Name*** field will automatically populate, and the roster information will appear on the right side of the screen.

Tip: To edit the **Roster Name** field, click the **Edit** icon in the right side of the field to make it editable.

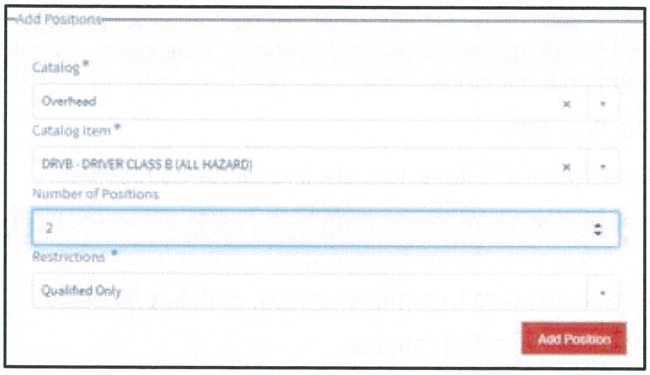
From here, you can clear the roster, delete the roster, reserve it, and add or modify positions, as described below.

Adding Positions to a Roster

During or after creating a roster—whether from scratch, a master roster, or a configuration—you may need to add positions.

1 To add positions to the roster, follow the instructions under Finding an Existing Roster, if necessary.

2 Select a **Catalog*** from the drop-down in the Add Positions pane.



> **Note:** The fields in this section change depending on the chosen catalog.

3 Choose a **Catalog Item***.

> **Note:** The **Catalog Item** field is filtered by the selected catalog.

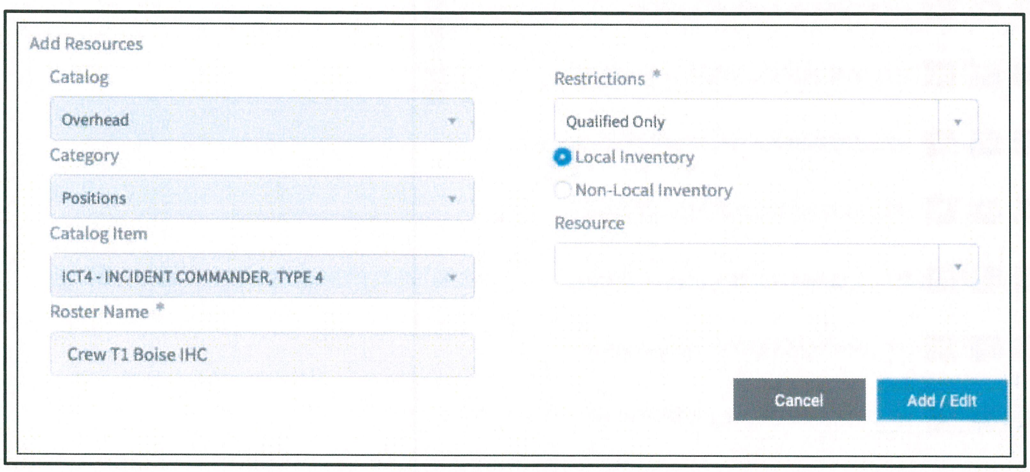
4 Choose the **Number of Positions** required for this resource.

5 Add **Restrictions***. This field only appears if applicable.

6 Click **Add Position**. Positions associated with this roster will appear on the right side of the screen. Continue to add positions until your roster is complete.

Modifying Existing Resources on a Roster

1 To add or edit a resource associated with a roster position, click the **Edit** ( ) icon for that position in the list on the right to bring up the Add Resources pane on the left.



> **Note:** Grayed-out fields are shown for reference only and are not available to edit.
>
> **Note:** Fields available will vary, depending on the resource catalog.

2 In the Add Resources pane, you may make changes to the position requirements or add a resource.

a **Restrictions*** – All overhead and certain crew resources are limited by qualification—Qualified Only, Trainee Acceptable, or Trainee Required.

b **Resource Inventory Source** – Select either **Local Inventory** or **Non-Local Inventory** to filter the list of available resources for the position to either those resources from your current dispatch center or resources from another dispatch.

Tip: To add **Non-Local Inventory** resources to your roster, select the **Non-Local Inventory** radio button in the Add Resources pane. Doing so brings up the **Dispatch** drop-down, where you can choose the appropriate dispatch center before selecting a resource.

c **Resource** – Select a **Resource** from the drop-down.

d **Reserved** – Click the **Reserved** checkbox, when available, to mark a resource as reserved.

Note: Reserved is a status only and will not prevent the resource from being assigned to another incident.

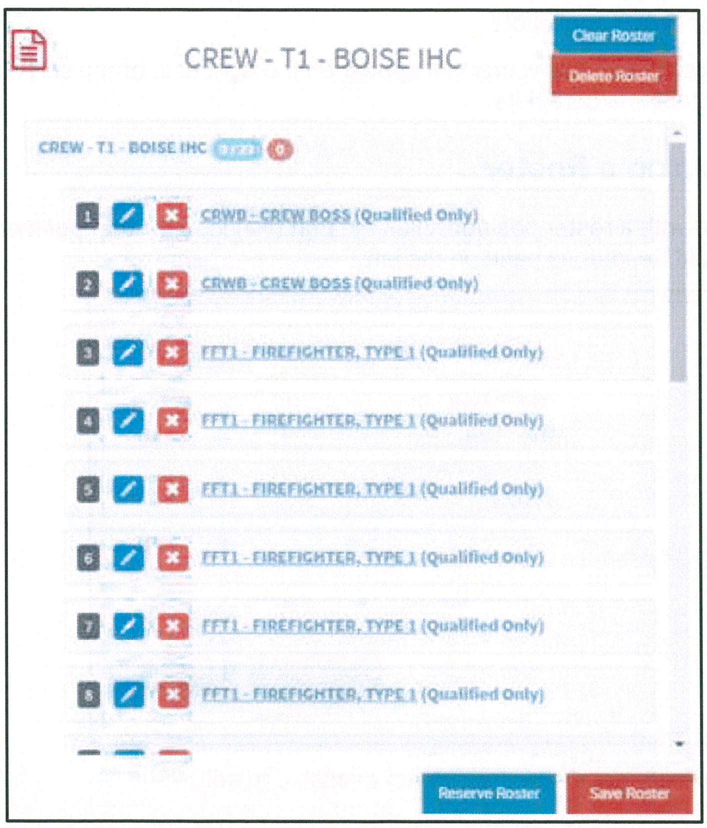
3 **Set Available** – To change an unavailable local resource to available status, click **Set Available**.

Note: If the resource is already available, this button will not appear.

4 When done, click **Add/Edit** to add the resource to the position or to save the edits; click **Cancel** to abandon your changes.

5. Managing the Roster List

There are many options for managing the roster positions on the right side of the screen.



Note: Rosters will automatically save periodically. A green confirmation message will appear at the top of the screen, reminding you the record was saved.

1 **Add Documentation –** Click the **Documentation** icon ( ) to add user documentation/journal entries.

2 **Clear Roster –** Click **Clear Roster** to remove all positions and resources from the roster.

3 **Delete Roster –** Click **Delete Roster** to remove the roster, including all positions and resources.

Note: You will be prompted to confirm the **Clear Roster** and **Delete Roster** actions.

4 **Roster Status –** The numbers at the top of the roster indicate roster position and resource status.

a The first set of numbers beside the roster name, such as 2/7, show the number of positions filled with a resource and the number of positions listed in the roster.

Example: "0/20" shows no position filled out of 22 total positions.

b The second number beside the roster name shows the number of positions filled with a resource that is in an unavailable status.

c Lines highlighted in red indicate that an assigned resource is in an unavailable status.

5 **Reorder Positions –** To reorder the list of roster positions, click and drag a position to a different line in the roster.

Note: The numbers on the left will automatically shift.

6 **Delete Positions –** To delete a position from the roster, click the **Delete** ( ) icon in that row.

7 **Reserve –** To mark the roster as reserved, click **Reserve Roster**.

8 **Save –** To complete the roster, click **Save Roster**.

9 **Return to IROC Homepage –** To exit Rosters and return to the homepage, click **Home** on the top left corner of the screen.

Note: It's important to click **Save Roster** before exiting Rosters. When leaving Rosters to return to the homepage, a dialog box will appear verifying you have saved your work. Click **Cancel** if you still need to return and save your roster, or click **OK** to continue to exit.

Basic IROC Training: Student Guide

Resource Status

Contents

1. Objectives

Upon completion of this unit, you will be able to:

- View resource status directly in IROC.
- Set the availability for a resource.
- Set a resource available to a specific area.
- Set resource availability periods.
- View the details for a resource.

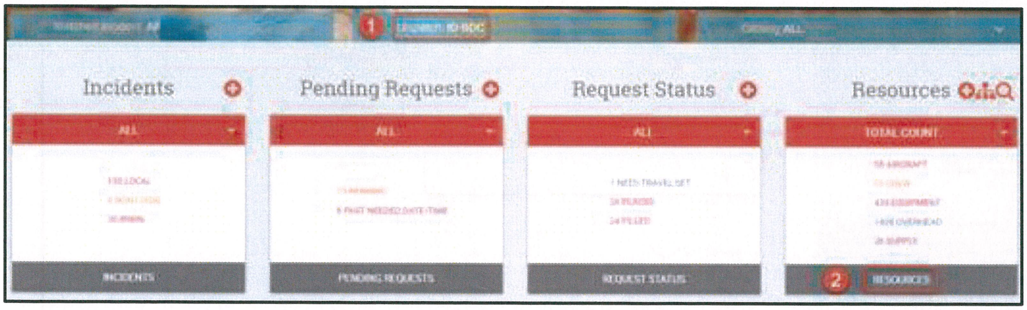
2. Resources Overview

Resources are the aircraft, crews, equipment, overhead, and supplies mobilized to incidents in IROC. Only dispatch managers can create a resource. However, all dispatchers can view resource information and set resource status.

This guide describes how dispatchers can view and set resource status within IROC, as well as how to view the details associated with a resource.

3. Viewing Resource Status

Example Scenario: Dispatcher Nancy wants to find all overhead resources listed as returned from assignment that need to be updated to available. She ensures that Catalog: Overhead is selected in the **Catalog** content selector. She clicks the Resources bar at the bottom of the action tile to navigate to list view. She clicks the **Returned From Assignment** quick filter to see a list with the relevant information.

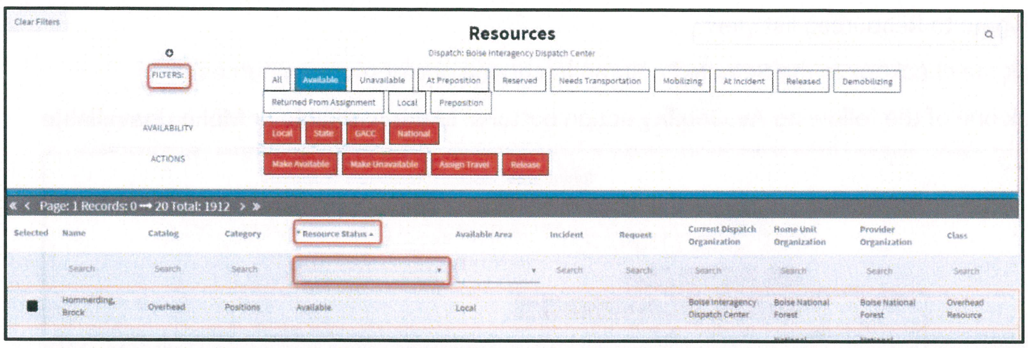


1 In IROC Portal, select the appropriate dispatch center from the **Dispatch** content selector.

2 Click the **Resources** bar on the Resources action tile to open the Resources work area on the bottom portion of your screen.

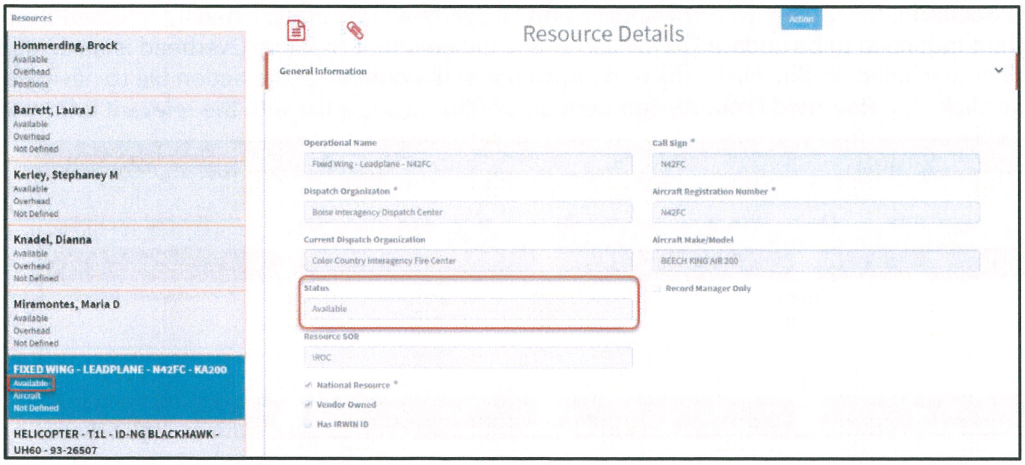
3 There are several ways to view resource status within the work area.

a In the default list view, you can filter the resource status column.



- Use the quick filters to choose one or more options. Selected options are blue; unselected options are white. To remove a quick filter, click it again.
- Click on the Resource Status column header to sort the items in the field in ascending or descending alphabetical order.
- Select a status from the drop-down list at the top of the column to filter the list to show only items that match your criteria.

b In accordion view, the status is listed beneath the resource name in the list on the left and is also displayed in the **Status** field of the General Information tab on the right.

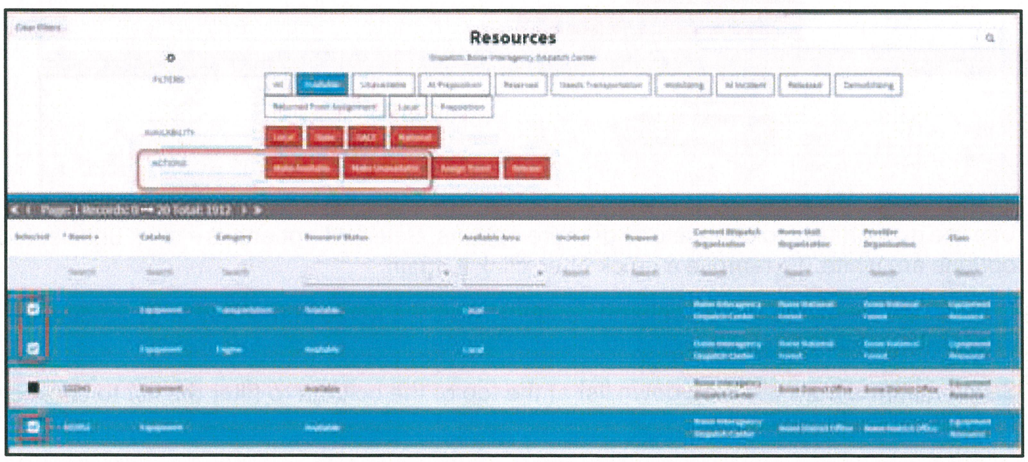


4. Setting Resource Availability

In the Resources list view of the work area, dispatchers can set resource availability to one or more items.

Example Scenario: After filtering the list to show resources returned from assignment, Dispatcher Nancy wants to set them all as available. She follows the steps here to change their status all at once.

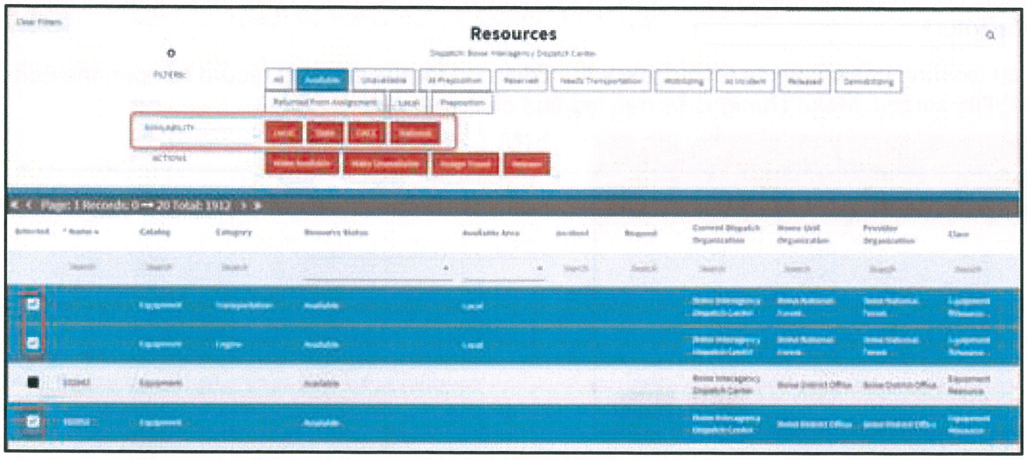
1. Navigate to Resources list view.
2. Click the checkbox in the **Selected** column to choose one or more resources.
3. Click one of the following **Availability** action buttons: **Make Available** or **Make Unavailable**



Note: The **Assign Travel** and **Release** action buttons will be covered in another section of the student guide.

5. Setting Resource Availability Area

Dispatchers can set the resource availability area for one or more resources.



1 Navigate to Resources list view.

2 Click the checkbox in the Selected column to choose one or more resources.

3 Click one of the following **Availability** action buttons: **Local**, **State**, **GACC**, or **National**.

Note: In ROSS, *availability area* was referred to as *selection area*.

6. Setting Resource Unavailability Periods

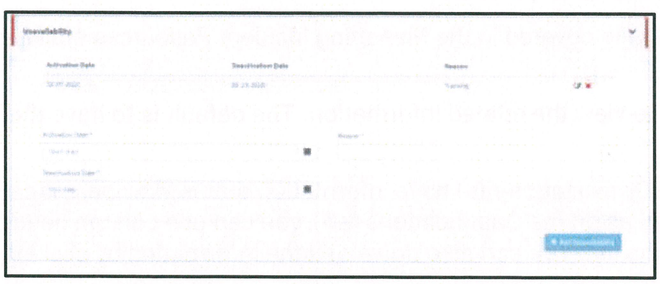
Dispatchers can set unavailability periods in the accordion view for Resources.

Example Scenario: Dispatcher Nancy needs to set an overhead resource as unavailable due to upcoming training. She follows the steps below to add the unavailability period to the resource.

1 Navigate to Resource list view.

2 Double-click on a row to choose a resource.

3 Select the Unavailability tab in the accordion view on the right side of the screen. In this tab, you'll see a list of existing unavailability information at the top. Beneath that is a form where you add additional information for this resource.



Tip: You will need to scroll down to the bottom of the accordion view to get to the Unavailability tab.

4 Enter dates the resource will not be available for service.

  a Enter the start date in the **Activation Date*** field.

  b Enter the end date in the **Deactivation Date*** field.

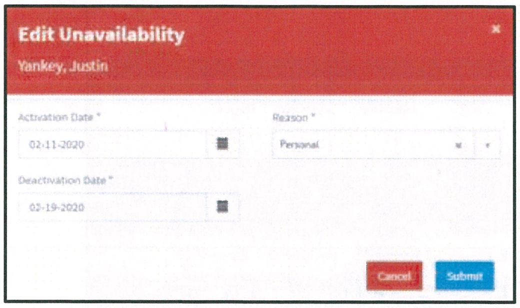
Note: If the resource will be unavailable for one day only, use the same date in both fields.

5 Select a **Reason*** from the drop-down.

Tip: Begin typing in the **Reason** field to perform a type-ahead search.

6 When done, click **Add Unavailability**. If the button is grayed out, check to ensure your dates are valid and in the future.

7 To edit an existing unavailability record, click the **Edit** icon for the existing record to open the Edit Unavailability screen. Make changes as needed and click **Submit.**



8 To delete an existing unavailability record, click the **Delete** icon for the existing record.

7. Viewing Resource Details

Example Scenario: Dispatcher Nancy wants to download a report of all assignments for a crew resource. She selects the resource in list view and then double-clicks on it and navigates to the Assignment History tab in accordion view. Clicking the Menu icon allows her to download the report as a PDF document. She could also choose Microsoft Excel or CSV as the format for the report.

1 Navigate to Resource Status accordion view.

2 The accordion view fields will vary depending on the Resource category. You can perform the following actions, regardless of category, by clicking on one of the following icons:

- **a** **Documentation icon** () – Click to add a comment/journal entry to the resource record.
- **b** **Attachment icon** () – Click to attach a document to the resource record.
- **c** **Release Resource action button**
- **d** **Edit Resource action button** – Available in the General Information tab. Click to view all resource details. This action button is grayed out for dispatchers.

Note: The **Release Resource** action button is covered in the Managing Incident Resources student guide.

3 Click a tab in the Resource Details pane to view the related information. The default is to have the General Information tab expanded.

Note: Many tabs (such as the list on the Organization tab) have information that is view only; it cannot be modified. However, for all tables (such as on the Qualifications tab), you can use column head sort and right-click functions to sort or filter the list. You can also download the information by clicking the **Menu** icon (≡).

Note: The Additional Attributes tab and the Contact Information tab are available only for Overhead resources.

- **a** **General information** – A view-only form showing a resource's operational name; dispatch organization; current dispatch organization; status; resource system of record; preferred jetport; and whether it is a national resource, is vendor owned, or has an IRWIN ID. The information on this tab cannot be modified by dispatchers.

- **b** **Additional Attributes** – A view-only list of additional attributes for an Overhead resource.
- **c** **Assignment History** – A table showing the assignment history for a resource.
- **d** **Auto Documentation** – A table showing all record activity for a resource.
- **e** **Contact Information** – A table showing all contact information for an Overhead resource.
- **f** **Contracts** – A table showing all contracts associated with a resource.
- **g** **Documentation** – Type text in the **Documentation** field and click **Submit**. The submitted information appears. Click **Export to PDF** to save this information as a Resource List report.
- **h** **Features** – A view-only list of features associated with a resource.
- **i** **Organizations** – A view-only list of all organizations associated with a resource.
- **j** **Qualifications** – A table showing all qualifications for a resource.
- **k** **Rosters** – A table showing all rosters associated with a resource.
- **l** **Unavailability** – See Setting Resource Unavailability Periods for more information.

For more information on how to view, filter, or download information in the tabs, refer to the "Navigating the IROC Portal Student Guide."

Basic IROC Training: Student Guide

Travel

Contents

1 Objectives

Upon completion of this unit, you will be able to:

- Set a resource's travel ETD and ETA

> **Note:** This guide currently covers setting Resource ETD/ETA. Future versions of this guide will contain information on the other travel options available in IROC.

2 Overview

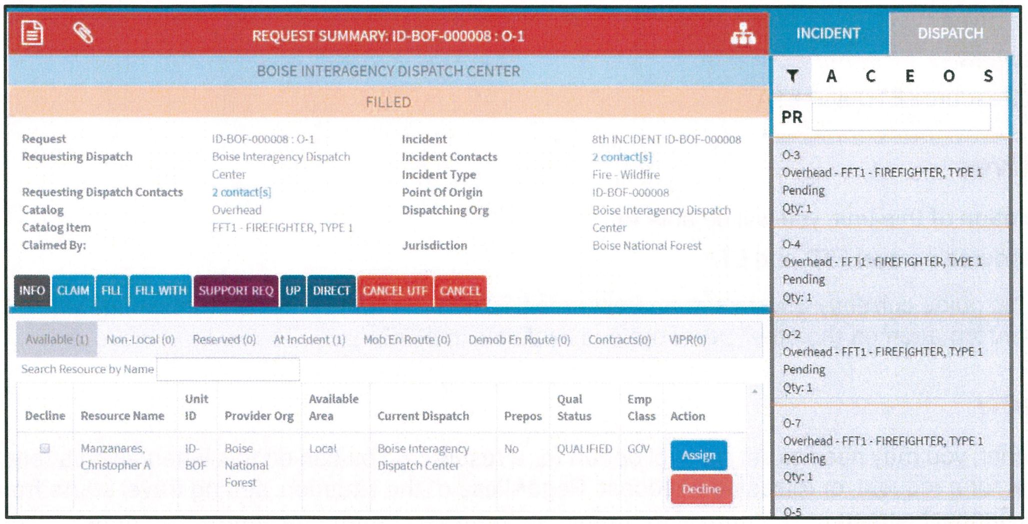
As a dispatcher, you may need to set a travel option for a resource. You can do this when filling a request, setting travel for a request, or releasing a request. Regardless of the situation, setting travel starts from the Manage Request screen.

3 Set Resource ETD and ETA

Where a detailed itinerary is not available, you can set an estimated time of departure and arrival for the resource. This section explains how to set resource ETD/ETA when filling, releasing, or modifying a request.

When Filling a Request

Example Scenario: Dispatcher Nancy is filling a request for a firefighter. As she fills with her resource, she chooses to set travel with the ETD/ETA option. She completes the resource's estimated time of departure to the incident and the estimated time of arrival. She then saves her record.

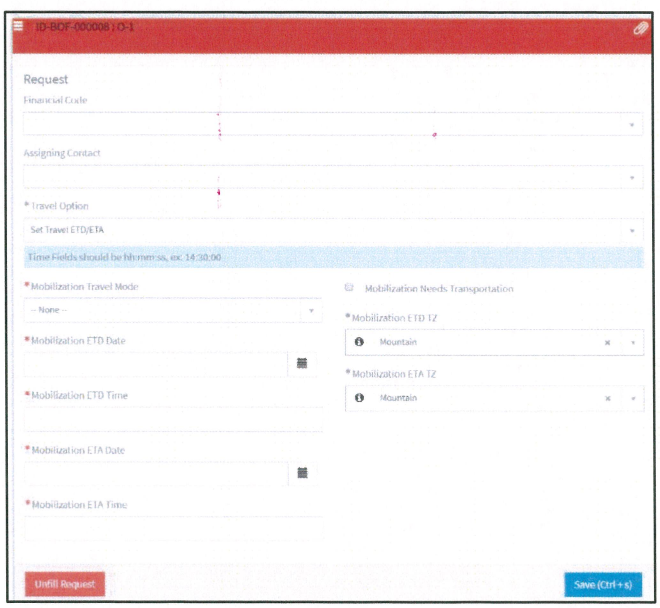


1 Navigate to the **Manage Request** screen.

2 Click the **Fill** action button to add a resource to the request.

3 Choose a resource and click the **Assign** action button to fill the request with that resource.

4 In the Incident request screen, choose **Set Travel ETD/ETA** from the **Travel Options*** drop-down.



5 Complete the required fields.

   a Mobilization Travel Mode

   b Mobilization ETD Date and Time – To set estimated departure

   c Mobilization ETA Date and Time – To set estimated arrival

   d ETD and ETA Time Zones – This defaults to the time zone for your current dispatch center.

6 When done with all fields, click **Save**.

When a Request Is Filled and Pending

When the resource is filled on a request, you can edit mobilization travel by clicking on the Travel tab from the Manage Request screen for that resource. Complete the same fields as previously described and save the request.

When the Resource Is Released from Incident

When the resource is released from incident, you can go to the Manage Request screen and enter their demobilization travel for when they are released. Complete the same fields as previously described and save the request.

> **Notes:**
>
> To set travel for a resource, your dispatch must be **one** of following:
>
> - The incident dispatch
> - A member of the ordering chain of the request
> - The home dispatch of the resource demobilizing to home
> - The preposition dispatch of a resource demobilizing from non-preposition back to preposition