



Version 6.2.4 User Guide  
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## Working with This User Guide

This User Guide is not intended to be read straight through like a textbook. Rather, it is a reference and information source for specific tasks you'll perform in IRIS. Depending on your duties and access privileges, you may never need (or see) some of the pages and functions described here.

- If you're new to IRIS, **Section 2.0: Getting Started** gives you basic information about navigating and working in the program. After reviewing this section, we recommend reviewing **Section 3.0: Working with Support Data** before beginning to enter resource or personnel information.
- If you're responsible for maintaining the supporting data that describes resources or personnel or if you are new to IRIS, see **Section 3.0: Working with Support Data**.
- If you need to work with resource records, turn to **Section 4.0: Working with Resources** for details on how to search, add, edit, delete, and manage resources in IRIS.
- If you need to work with personnel records, see **Section 5.0: Working with Personnel** for details on how to add, edit, delete, search, and manage personnel in IRIS.
- If you need to manage the resource typing definitions or position qualifications in IRIS, refer to **Section 6.0: Working with Definitions and Qualifications**.
- If you need to share your data with other systems, to include other IRIS installations, see **Section 7.0: Data Sharing**.
- If your duties include managing other IRIS users and their access privileges, **Section 8.0: Working with User Accounts** has what you need to know.
- If you have just downloaded and installed IRIS or need to configure the IRIS system as a whole, review **Appendix A: Configuring IRIS [System Administrator Guidance]**.

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## 1.0 Introduction

The Incident Resource Inventory System (IRIS) is a “no cost” resource inventory tool provided by the Federal Emergency Management Agency (FEMA) National Preparedness Directorate (NPD). This software enables response officials to record resources in a database and to search for and identify specific resources for incident response and mutual aid planning and use. IRIS is developed and maintained by Preparedness Toolkit (PrepToolkit) staff, who are under contract with FEMA NPD.

*Resource typing* is the process of categorizing, by capability, the resources requested, deployed, and used in incidents. Measurable standards identifying resource capabilities and performance levels serve as the basis for categories. Resource users at all levels use these standards to identify and inventory resources. The National Incident Management System (NIMS) describes standardized resource management practices such as typing, inventorying, organizing, and tracking. These practices allow for effective sharing and integration of critical resources across jurisdictions.

Resource typing exists to provide common standards and terminology when discussing the resources that multiple agencies are deploying to an incident. If each agency identifies its resources with the same typing scheme, you can ask for a given resource by name and be confident that the resource delivered will be the same thing you envisioned when you made the request. You’ll also know its basic capabilities, which will enable you to assign that resource to appropriate tasks. All these concepts are part of NIMS Component III, Resource Management, as defined in the core NIMS document [Ref 4].

IRIS allows you to connect with the Resource Typing Library Tool (RTLTL), which is an online catalog of national typing definitions and position qualifications. The connection between IRIS and RTLTL provides you with the most up-to-date national resource typing definitions and job titles/position qualifications when inventorying your resources.

For more detailed training on resource typing, resource management, and related concepts, you can take FEMA’s online independent study course, IS-703: NIMS Resource Management [Ref 3].

IRIS is designed to help your agency comply with NIMS by inventorying and typing resources using standard definitions. If your agency manages resources that don’t match any of the standard definitions or position qualifications, you also can create your own definitions and qualifications. FEMA’s national standard definitions and qualifications are displayed in the system as *National Tier*, while local definitions and qualifications are displayed as *Local Tier*.

### 1.1 Records in IRIS

The focus of IRIS is the records for resources and personnel, so you’ll likely spend a lot of time working with resource records and personnel records. **Section 4.0: Working with Resources** and **Section 5.0 Working with Personnel** describe these processes in more detail. If you’re familiar with typed resources and position qualifications or are a veteran user of previous IRIS versions, you can skip to those sections for detailed instructions on how to work with resources and personnel in IRIS. If you are a new user, you may want to review **Section 2.0: Getting Started** before attempting to dive into resource and personnel creation.

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**Note:** IRIS stores all data locally on the user's computer or network, depending upon setup. IRIS is **not** a database centrally managed by FEMA. Users and their respective agencies are responsible for their own data, including system credentials.

## 1.2 Getting Help

### 1.2.1 Embedded Help and Tooltips

IRIS includes an embedded help feature. On any page of IRIS, click the Help link in the top right corner of the page to access this user guide. In addition, most controls in IRIS have *tooltips*. A tooltip is a small amount of text that appears when you hover your mouse pointer over a button, hyperlink, or field. These tooltips are intended to provide quick references for the functions of these controls.

### 1.2.2 Help Desk Support

Technical experts are available to provide additional assistance installing and using IRIS. You may submit IRIS enhancement requests or contact the IRIS Help Desk at [iris@preptoolkit.fema.dhs.gov](mailto:iris@preptoolkit.fema.dhs.gov).

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## 2.0 Getting Started

IRIS is a Web-based application, which means you access your organization's copy of IRIS through a Web browser. You can get the appropriate Web address from the person or department that serves as the system administrator. **Table 1: Recommended Web Browsers** lists the web browsers that work well with IRIS.

**Table 1: Recommended Web Browsers**

Web Browser	Recommended Versions
Google Chrome	60+
Microsoft Internet Explorer	11
Mozilla Firefox	55+

### 2.1 Your IRIS Account

#### 2.1.1 Log In

##### 2.1.1.1 Default Credentials

If you downloaded and installed IRIS, you can access the system by using the default credentials. See **A.5: Initial Login and Setup** for additional information.

##### 2.1.1.2 Provided Credentials

If your system administrator installed and configured IRIS, log into IRIS by opening the Web address supplied by your IRIS system administrator in one of the recommended browsers (see **Table 1: Recommended Web Browsers**). Enter in your Username and Password as supplied by your system administrator.

On your initial log in, the system will prompt you to reset your password. Password rules are provided for you on the page. Enter a new password, confirm the password, and select **Reset Password**. You will be asked to select three different Password Reset Questions and provide answers to those questions. Select **Update**.

#### 2.1.2 Log Out

To log out of IRIS, click the **Log Out** link at the top of any page.

#### 2.1.3 User Roles

IRIS takes a role-based approach to your access. This means your system administrator can define specific roles (i.e., job descriptions), assign appropriate levels of access to each role, and then assign one or more roles to each user. Thus, your assigned roles determine which IRIS functions you can see and use. You can have a different role in each of your organizations (see **Section 2.2.2: Organizations**).

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This guide describes the full set of functions available in IRIS. If you do not see a particular control or piece of information and think you should have access to it, the most likely explanation is that your assigned roles do not include that level of access. For assistance with role and permission issues, contact your system administrator.

For more information on managing roles and users as an administrator, see **Section 8.0: Working with User Accounts**.

## 2.1.4 Managing Your Password and Reset Questions

To change your password, click your username at the top of the page. This opens the Change Password page. Follow the instructions on the Change Password page then click the **Change Password** button. The Change Password page refreshes to confirm that IRIS has saved your new password.

Beside the **Change Password** button is a **Manage Reset Questions** button. The **Manage Reset Questions** button gives you the opportunity to view the reset password questions and answers you provided and the opportunity to update those questions and answers.

## 2.1.5 Forgotten Password

**Note:** The IRIS Help Desk cannot reset your password for you. Please contact your system administrator.

If you forget your password, click the **Forgot Password** button on the IRIS login page. Enter your username then click **Continue**. You will be directed to answer your security questions then click **Submit**. If you answered your questions correctly, you will have the opportunity to enter in a new password. If you answered your questions incorrectly, you will have an opportunity to try answering your questions a second time. However, if you are not able to gain access after several attempts, you should seek assistance from your system administrator.

## 2.2 Basic Information

As a Web-based application, IRIS behaves like most familiar websites. It uses hyperlinks and buttons to control navigation and actions. It presents different controls and information on different pages. Other controls for data entry, such as text fields, drop-down lists, and check boxes, also work the same way in IRIS as they do in other website forms.

### 2.2.1 Home Page

When you log into IRIS, the first page presented to you is the IRIS Home page. The **Home** tab will always return you to the home page.

The home page contains the top-level navigation links for the main types of data you can manage in IRIS and contains the Resource Typing Library Dashboard.

- If a new version of IRIS is available for download you will see a **New Version Available** link. The link takes you to a page to view the new version number with a description of the new version, and provides a link to download the newest version available.

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- The Resource Typing Library Dashboard displays the status of the national resource typing definitions and position qualifications that FEMA manages through its Resource Typing Library Tool (RTLTL). For more information on RTLTL and how IRIS works with it to keep your organization's definitions and qualifications up-to-date, see **Section 6.1: Updating Definitions and Qualifications from RTLTL** or visit the RTLTL's webpage at <https://rtltoolkit.fema.gov>.
  - The **Resources** button/tab takes you to the resource records stored in IRIS. Depending on your role, you can view, edit, create, or delete these resource records. For more information on resource records and how to work with them, see **Section 4.0: Working with Resources**.
  - The **Personnel** button/tab takes you to the personnel records stored in IRIS, much like the **Resources** button/tab. Depending on your role, you can view, edit, create, or delete these personnel records. For more information on personnel records and how to work with them, see **5.0: Working with Personnel**.
  - The **Typing Library** button/tab provides access to view all resource typing definitions and position qualifications in the system and the opportunity to create and manage local tier resource typing definitions and position qualifications. For more information on local tier definitions, see **Section 6.2: Working with Local Tier Definitions**.
  - The **Support Data** button/tab takes you to the sets of information that underpin the resource and personnel records (certifications, training, contacts, contracts, manufacturers, resource owners, etc.), typing library (categories, core capabilities, and types), resource typing definitions (kinds, components, metrics, etc.), and position qualification (criteria categories). Depending on your role, you can view, edit, create, or delete items in these lists of support data. For more information on support data and how to work with it, see **Section 3.0: Working with Support Data**.
  - The **Public Directory** button takes you to a list of other IRIS installations, enabling you to search and discover other IRIS installations that have optionally chosen to participate in the directory. For more information about the Public Directory, see **Section 7.1: Public Directory**.
  - The **Administration** button/tab provides access to IRIS's user management functions and the settings that determine how your organization's copy of IRIS operates. For more information on the administrative side of IRIS, see **Section 8.0: Working with User Accounts** and **Appendix A: Configuring IRIS [System Administrator Guidance]**.

The top right side of the page contains three additional links and may contain a dropdown list:

- **Organization** is a dropdown list that enables you to see and change the organization in which you're working (see **Section 2.2.2: Organizations**). This dropdown list will only be visible if you have access to more than one organization in IRIS.
- The link with your username enables you to change your password and manage your password reset questions (see **Section 2.1.4: Managing Your Password and Reset Questions**).
- **Help** opens a copy of this user guide.
- **Log Out** logs you out of IRIS.

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At the bottom of the page, you will see the IRIS version number and a link to contact the help desk and the privacy policy.

## 2.2.2 Organizations

Your copy of IRIS can be used to manage the resources and personnel records of many different departments or groups. For example, if you use a single copy of IRIS to manage the resources and personnel of all county agencies that might be involved in disaster response, it might include records for the city fire department, the city police, the county sheriff's department, the county ambulance service, the city public works department, and the county highway department. IRIS refers to each of these agencies or departments as a separate *organization*.

As a user, you may have different roles (i.e., different levels of access) with different organizations. You can work with only one organization's resources and personnel at a time. If you have access to more than one organization, the **Organization** drop-down list in the header menu shows the organization in which you're currently working. To work in a different organization's records, open the list and select the one you want.

For more information on setting up organizations within IRIS, see **Section A.7.1: Adding Organizations**.

## 2.3 Standard Pages and Controls

Many different pieces of information make up the records and resource typing definitions and position qualifications in IRIS. Most of your work with these data elements will involve a few standard pages, each with its own standard controls. The information on each page will change depending on the type of data you're working with, but similar pages generally will work the same way.

### 2.3.1 "List" Pages

A list page centers on a table which lists all the data elements of a given type, like resources, personnel, contracts, or locations. A list page isn't actually titled "List," but rather is named according to the type of data it lists. Thus, the list page for resources is titled "Resource."

The table of data elements always contains at least two columns: **Name**, which contains each data element's name, and **Actions**, which contains hyperlinks for certain basic actions you can perform with each data element. If the full list contains more than 25 items, additional navigation links become active at the table's bottom right corner, allowing you to scroll forward and back through the list. The table will show a maximum of 25 items at once.

On a List page, you can:

- Search for data elements that contain a specific word or phrase. Enter your search target in the text box above the table's top right corner, then click the **Search** button. This reloads the page, with the table now displaying only the data elements that match your search target.
- Create a new data element of the appropriate type. Click the **Create [type]** link above the table's top left corner. This opens a create page – see **Section 2.3.4: "Create" Pages**.

- 
- View the details of a selected data element. Click the corresponding **View** link in the table’s Actions column or click the name of the item in the list. This opens a view page for the selected data element – see **Section 2.3.2: “View” Pages**.
  - Edit the details of a selected data element. Click the corresponding **Edit** link in the table’s Actions column. This opens an edit page for the selected data element – see **Section 2.3.3: “Edit” Pages**.
  - Delete a selected data element. Click the corresponding **Delete** link in the table’s Actions column. This opens a delete page for the selected data element – see **Section 2.3.5: “Delete” Pages**.
  - Export the complete records of all data elements shown in the table to a CSV, KML, or XML file.<sup>1</sup> Click the **Export CSV**, **Export KML**, or **Export XML** button at the bottom of the page. This opens a standard file download dialog (whose appearance may differ depending on your operating system and Web browser). Open or save the file as desired.
  - Some List pages will give you the option to import records. Import records by clicking the **Import CSV** or **Import XML** button at the bottom of the page. This opens a standard file import dialog (whose appearance may differ depending on your operating system and Web browser). Browse to the desired file and select **Upload**.

## 2.3.2 “View” Pages

A view page displays the details of a single data element. Each view page is titled “View,” followed by the type of data element it displays – e.g., “View Person” or “View Resource.”

On a view page, you can:

- Return to the list page for this data type. Click the **Return** button at the bottom left corner of the page.
- Edit the details of the current data element. Click the Edit button at the bottom left corner of the page. This opens an edit page for this data element – see **Section 2.3.3: “Edit” Pages**.
- Export the current data element to a CSV or XML file. Click the **Export CSV** or **Export XML** button at the bottom of the page. This opens a standard file download dialog (whose appearance may differ depending on your operating system and Web browser). Open or save the file as desired.
- Delete the current data element. Click the **Delete** button at the bottom left corner of the page. This opens a delete page for the selected data element – see **Section 2.3.5: “Delete” Pages**.

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<sup>1</sup> If the table reflects the results of a search, the export file will contain only the data elements shown in those results. If the table has more than 25 entries (i.e., spans more than one page), the export file will contain all entries, not just the 25 on the current page.



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### 2.3.3 “Edit” Pages

An edit page enables you to change the details of a single data element. Each edit page is titled “Edit,” followed by the type of data element it allows you to modify – e.g., “Edit Location” or “Edit Owner.”

On an edit page, you can:

- Change any information in any text box; change the selection of any drop-down list; and check or uncheck any check box.
- Save your changes. Click the **Save** button or the **Save and Close** button at the bottom left corner of the page. IRIS saves any changes you’ve made and returns to the list page for this data type.
- Cancel your changes. Click the **Cancel** button at the bottom left corner of the page. IRIS discards any changes you’ve made and returns to the list page for this data type.
- View the data element without editing it. Click the **View** button at the bottom left corner of the page. IRIS discards any changes you’ve made and opens the view page for the current data element – see **Section 2.3.2: “View” Pages**.
- Delete the data element. Click the **Delete** button at the bottom left corner of the page. This opens a delete page for the selected data element – see **Section 2.3.5: “Delete” Pages**.

To prevent accidental breakage of records, you can’t edit a typing definition or position qualification support data element that is referenced by one or more national tier resource typing definitions or position qualification. For example, you can’t change the name of the Animal Emergency Response resource category because the Animal Sheltering Team definition classifies that resource under that category. If you try to edit such a data element, IRIS notifies you of the relationship and prevents the change.

#### 2.3.3.1 *Attaching Files and Hyperlinks*

When you’re editing a resource, certification, contract, or local tier resource typing definition or position qualification, you can attach files and links to the data element for use as references.

To add a file, click the **Add** (or **Add File**) link under **Files**. Click the **Choose File**<sup>4</sup> button and drill down to the file you want to add, select **Open**, then click the **Add** or **Save** button.

To add a link, click the **Add** (or **Add Link**) link under **Links**. Add in the display text for the link and the Uniform Resource Locator (URL), select **Open**, then click the **Add** or **Save** button.

If you need to remove a file or a link, select the appropriate **Remove** link for that file or link.

### 2.3.4 “Create” Pages

**Note:** For specific information regarding the creation of resources, see **Section 4.1: Create Resource**. For more specific information regarding the creation of personnel, see **Section 5.1: Create Person**.

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A create page enables you to create a data element. Each create page is titled “Create,” followed by the type of data element it allows you to create – e.g., “Create Contact Group” or “Create Custom Attribute.”

On a create page, you can:

- Add any information in any text box; make a selection of any drop-down list; and check or uncheck any check box.
- Save your creation. Click the *Save* (or *Save and Close*) button at the bottom left corner of the page. IRIS saves what you’ve added and on some pages gives you the opportunity to add more information. If this is the case, select *Update* to save the additional information. Otherwise IRIS returns to the list page for this data type.
- Some Create pages will give you the option to import records. Import records by clicking the *Import CSV* or *Import XML* button at the bottom of the page. This opens a standard file import dialog (whose appearance may differ depending on your operating system and Web browser). Browse to the desired file and select *Upload*.
- Cancel your changes. Click the *Cancel* button at the bottom left corner of the page. IRIS discards any additions you’ve made and returns to the list page for this data type.

### 2.3.5 “Delete” Pages

A delete page displays the details of a single data element, similar to a view page. Each delete page is titled “Delete,” followed by the type of data element it displays – e.g., “Delete Contract Group” or “Delete Manufacturer.” You can reach a delete page only by clicking a *Delete* button or link. This page allows you to confirm or cancel this deletion.

On a delete page, you can:

- Permanently delete the current data element. Click the *Delete* button at the bottom left corner of the page. The item is deleted and IRIS returns to the list page for that data type.
- Cancel the deletion. Click the *Cancel* button at the bottom left corner of the page. IRIS returns to the list page for that data type but does not delete that item.

**Caution:** IRIS has no un-delete function. If you click the *Delete* button on a delete page, deletion is permanent. The selected data element cannot be recovered without restoring the entire database from a backup, if a backup is available. See **Section A.9.1: Backup/Restore** for more information regarding backups.

To prevent accidental breakage of resource records, you can’t delete a support data element that is referenced by one or more resources or personnel. For example, you can’t delete a contact that is listed as any resource’s primary or deployment contact. If you try to do so, IRIS prevents the deletion and advises you to remove those references.

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## 2.4 Specific Pages

Certain pages are only available when working with resources or personnel. The pages are explained in the following sections.

### 2.4.1 Clone

If an already documented resource or person is very similar to one you want to add, you may copy the existing record into a new record then change the attributes that are different. In IRIS, this is called *cloning*. For more information regarding cloning, see **Section 4.4: Clone Resource** or **Section 5.4: Clone Personnel**.

### 2.4.2 Bulk Update

The bulk update allows you to change supporting data for all your records results at one time. You can select the checkboxes of the supporting data to update – status, definition, duty station, supervisor, type, owner, home location, present location, manufacturer, model, minimum lead time, etc., – then update the information using the correlating dropdown boxes. To perform a bulk update, see **Section 4.7: Bulk Updates or Bulk Delete** for resources or **Section 5.7: Bulk Updates or Bulk Delete** for personnel.

### 2.4.3 Bulk Delete

A bulk delete functions in the same manner as a bulk update, but you are deleting records instead of updating or changing them. To perform a bulk update, see **Section 4.7: Bulk Updates or Bulk Delete** for resources or **Section 5.7: Bulk Updates or Bulk Delete** for personnel.

### 2.4.4 Export and Import

Certain export and import buttons are only available on specific pages. When available, buttons for ***Export KML***<sup>2</sup>, ***Import XML*** and ***Import CSV*** will be available to perform those specific actions.

The ***Import XML*** feature is most helpful when transferring information from one installation of IRIS into another or when transferring information from one organization in IRIS into another organization within the same IRIS. Note that the source IRIS and the destination IRIS should be of the same version (for example, IRIS Version 6.2.4).

The ***Import CSV*** feature is helpful for System Administrators, Organization Administrators, Resource/Personnel Managers, and Resource/Personnel Entry roles when importing resources, locations, contacts, and/or personnel from a separate system or from a separate database or spreadsheet. Below are recommended steps for importing resources via CSV.

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<sup>2</sup> In order for exporting to KML work, you will need a Geographic Information System (GIS) system such as Google Earth and longitude/latitude data entered in IRIS for the locations of resources and personnel.

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1. Download the national resource typing definitions from RTLTL using the Resource Typing Library Dashboard on the home page of IRIS. For more information on downloading definitions, see **Section A.6: Downloading Definitions**.
  2. To get a CSV file template, log into IRIS, navigate to the Resource or Personnel tab, and select the “Export CSV” button. NOTE: It is recommended that you create one “test record” in IRIS with all fields populated prior to this export so you have example data when working with the template.
  3. If your data needs to be divided amongst different organizations, go ahead and set up these organizations in your IRIS. Populate a separate template for each organization.
  4. Begin populating your template that you downloaded in step 1 for each organization (only one if there is only one organization in IRIS). The first row in the template will contain the headers and will be needed in the file which is imported. If example data was added in step 2, above, the second row will contain example data.
  5. If the same location or contact is to be used for multiple records, ensure the same location/contact information is entered for those resources. Otherwise, ensure the names of your elements are unique. For example, if you have two different “fire station” locations, ensure each has a unique name (e.g., “Fire Station 1” and “Fire Station 2”).
  6. You do not have to use all of the fields contained in the template, and the organization field can/should be left blank (see step 10 for more information on organizations). The import file essentially functions like the fields onscreen within IRIS--some are required and some aren't. At minimum, all you need is the Name field (the status will default to Available, in that case).
  7. To type resources or personnel against the national resource typing definitions, identify the "Resource Typing Definition ID" and "Resource Typing Definition Type" in IRIS for your records and populate those fields in your template. IRIS will use those two data points to populate the rest of the necessary definition information.
  8. Local resource typing definitions are created by a System Administrator or Definitions Manager. To type records against local resource typing definitions or position qualifications, you may either:
    - a. Populate the applicable fields in the template for that definition or qualification. Leave the Resource Typing Definition ID field blank. Once you have imported your records, you will need to add criteria to these definitions through the IRIS user interface and add types to your records (e.g., Type 1, Type 2, Type 3).
    - b. Create your local resource typing definitions directly in the IRIS interface. This can be done by navigating to the *Typing Library* tab and selecting the **Create Resource Typing Definition** or **Create Position Qualification** link. Once you have your resource typing definitions or position qualifications in IRIS, you may type the resources in your CSV file for import by referencing the appropriate local definition name and type in the “Resource Typing Definition Name” and “Resource Typing Definition Type” columns, respectively.

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9. Certain contact information is denoted within parenthesis (e.g., values for "Contact 1" and "Contact 1 Phone 1" columns). These values specify the contact type and the contact phone type, respectively, and are required for these fields. Ensure a contact type of **Primary** or **Deployment** is added for each contact and that a value of After Hours, Cell, Day Time, Fax, or Other is added for each contact phone.
  10. To import your file, navigate to the **Resources** or **Personnel** tab in IRIS and select the **Import CSV** button. When importing, ensure you are logged into the appropriate organization under which you would like your records to be added. The Organization column in the template is ignored upon import—all records in the file will be assigned to the organization under which you are logged in.

Once your file is ready for importing, it can be imported by selecting the **Import CSV** button on the Resources or Personnel page.

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## 3.0 Working with Support Data

The purpose of IRIS is to inventory and classify resources and personnel. Accordingly, most of your work will occur with resources and personnel themselves (as described in **Section 4.0: Working with Resources** and **Section 5.0: Working with Personnel**). However, IRIS also manages a large amount of other information that is associated with resources and personnel, even if it doesn't directly describe the resources or personnel themselves. We refer to this other information as *support data*.

Support data has a “one-to-many” relationship with resources and personnel. In other words, a single piece of support data can help define multiple resource and personnel records. An example of this is a contract that covers the lease of heavy equipment for debris removal in the event of a major disaster. Once you save a copy of this contract in IRIS, you can attach that contract to each bulldozer, grader, excavator, and dump truck resource that the contract covers. If you need to record a later update to that contract, you only have to change the central contract record in IRIS's support data area, rather than having to make individual changes to each associated resource.

To start working with support data, click the header menu's **Support Data** tab or the IRIS Home page's **Support Data** button. This launches the Support Data page. On this page, support data is divided into several categories: *asset support data*, *resource support data*, *personnel support data*, *typing library support data*, *resource typing definition support data*, and *position qualification support data*.

### 3.1 Asset Support Data

Asset support data is information that describes the contacts, contracts, locations, and other attributes associated with a resource or a person. All asset support data is specific to the organization – it's not shared across all organizations in your instance of IRIS.

#### 3.1.1 Contacts

A contact is an individual who is a person's supervisor or has control or authority over a resource. You can record a contact's job title, organizational affiliation, email address, and phone numbers. You can then associate a contact with one or more resources or personnel records.

There is a relationship between contacts and personnel stored in IRIS. See **5.9 Relationship Between Personnel and Contacts** for more information.

#### 3.1.2 Contact Groups

A contact group is a collection of multiple contacts who are related in some way – typically, members of the same organization. You can add any number of contacts to a contact group, then associate the contact group with one or more resource.

#### 3.1.3 Contracts

IRIS enables you to record contracts that are related to a person or a resource availability or deployment. An example is the contract that covers the lease of heavy equipment for debris removal described above in **Section 3.0: Working with Support Data**. Once you've recorded a contract's details (including any

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files, such as a PDF copy of the contract, and any links, such as the websites of other parties to the contract), you can associate the contract with one or more resources.

### 3.1.4 Custom Attributes

The addition of this feature lets you add a custom attribute and a value via free-form text boxes. These attributes and values can be added to resources or personnel.

An example of using custom attributes (and selecting the *Allow value reuse* checkbox) would be to add the attribute “Incident Number” to declared disasters. The value would be the actual incident number assigned to the disaster. Since the value was selected to be reused, it could be added to multiple resources and personnel that were deployed to the disaster. An advanced search by the incident number could list all of the resources used during that disaster and every person who was deployed.

Custom attributes could be used to add a quantity to a resource. An example would be inventorying bottled water that was donated to your volunteer fire department. You created a resource entry for 1000 bottles of water to keep on hand for the volunteer firefighters and displaced home/business owners. After battling a house fire, the volunteer firefighters consumed 50 bottles of water. The bottled water quantity could then be updated to 950.

If you wanted to add a custom attribute of a vehicle identification number (VIN) to resources, you could add the VIN and not select the *Allow value reuse* checkbox, since each resource would have a unique VIN value.

### 3.1.5 Locations

In IRIS, a location is a fixed address or set of coordinates that defines a place at which a person or a resource can be located. Each resource record can include a home location (its permanent station, office, or storage facility) and its present location (the base, command post, maintenance yard, or other place where it’s located temporarily). Each personnel record can include a duty station (their normal office or worksite) and their deployed location (the base, post, or other place they are temporarily located).

Each location can have a street address,<sup>3</sup> a latitude and longitude coordinate set, and a U.S. National Grid (USNG [Ref 2]) reference. You don’t have to add all of these, though. Use only those which apply to the way your agency and its response partners handle navigation.

#### 3.1.5.1 Using Latitude and Longitude

If you use latitude and longitude in IRIS, record these coordinates in decimal minutes (e.g., 37.083056), *not* degrees-minutes-seconds (e.g., 37° 4’ 59”). Many websites offer converters for these two formats. For example, the Federal Communications Commission (FCC) hosts one at <https://www.fcc.gov/media/radio/dms-decimal>.

Most locations in the United States and its territories have a north (positive) latitude and a west (negative) longitude. To enter a negative coordinate value, add the minus sign (-) in front of the number. You don’t need to add a plus sign (+) for a positive coordinate value.

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<sup>3</sup> IRIS supports U.S., Canadian, and Mexican addresses, including these nations’ postal code formats.

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### 3.1.5.2 Using U.S. National Grid

If you use USNG in IRIS, you must enter a grid zone designation (GZD) and a 100,000-meter square – for example, “16SGH.” Grid coordinates aren’t required beyond this level of accuracy, though you can enter them as desired. You must enter your whole USNG coordinate with no spaces.

## 3.2 Resource Support Data

Resource support data is information that describes the certifications, manufacturers, and owners associated with a resource. All resource support data is specific to the organization – it’s not shared across all organizations in your instance of IRIS.

### 3.2.1 Certifications

A certification indicates that a resource (or the organization that owns it) meets certain standards of performance, training, or capability. For example, different search and rescue (SAR) teams may be trained to different minimum levels for confined space search and rescue, rope rescue, and swift water search and rescue. Each SAR team’s record in IRIS can be associated with the appropriate levels of certification in each area of specialty. This enables users to see the specific tasks that each SAR team can perform, or to search on a certification to see all SAR teams with that competency.

### 3.2.2 Manufacturers

Part of what defines a piece of equipment is its manufacturing information – the manufacturer’s name and the equipment’s model number. To help you search on standard terms, IRIS enables you to create a list of manufacturers, then create sub-lists of models produced by each manufacturer. For example, if you wanted to ensure that your copy of IRIS supported all your agency’s pickup trucks, you could create appropriate manufacturers and models as shown in the following table:

**Table 2: Manufacturer and Model Example**

Manufacturer	Models
Chevrolet	Colorado S-10 Silverado
Ford	F-150 F-350 Ranger
Nissan	Frontier Titan

Each manufacturer is a separate support data element, and each of that manufacturer’s models is a sub-element of the overall manufacturer (as shown by the manufacturer-model rows in **Table 2: Manufacturer and Model Example**). To edit models, you must first choose to edit the associated manufacturer.



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### 3.2.3 Resource Owners

A resource's owner is the agency, company, person, or other entity that owns it. If your copy of IRIS is set up so that each agency is a single organization, a resource's owner and organization may be the same. However, if your copy of IRIS is set up so that each organization represents a higher-level jurisdiction, owners may be individual agencies within that jurisdiction. Consider the example of a multi-county IRIS system, in which each county government is an organization. In this case, resource owners would include the individual fire departments, sheriff's offices, and public works departments in those counties.

Resource owners also can be entities that aren't represented within IRIS at all. An example of this is a construction company that owns heavy equipment. The county has contracted with the company for debris removal and those heavy equipment resources are available, but the company itself isn't an IRIS user. In this case, the records of the equipment would be maintained in the appropriate IRIS organization, but the construction company would be listed as the owner of those resources.

## 3.3 Personnel Support Data

Personnel support data is information that describes the training associated with a person. Personnel support data is specific to the organization – it's not shared across all organizations in your instance of IRIS.

### 3.3.1 Training

Training describes the type of training personnel have received. Standard types of training are education, training, experience, and license/certification.

## 3.4 Typing Library Support Data

Typing library support data is information that helps classify and describe resource and personnel. Your copy of IRIS shares all its typing library support data across all its organizations.

If your agency chooses to use only the standard National Tier definitions, you'll rarely need to do anything with this support data. However, if your agency chooses to extend the standard definition set by adding its own local definitions (as described in **Section 6.2: Working with Local Tier Definitions**), you may need to add additional elements to this support data.

### 3.4.1 Categories

Categories describe functions of incident response. A resource typing definition's category is the response function in which it would be *most* useful.

A new copy of IRIS comes pre-loaded with the NIMS standard resource categories. You can add additional categories as needed.

### 3.4.2 Core Capabilities

The National Preparedness Goal (the Goal) [Ref 5] defines a list of core capabilities. These are specific capabilities that the federal government considers essential to preventing, protecting against, mitigating,

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responding to, and recovering from major disasters. In a resource typing definition, a resource is designated as supporting one of these core capabilities.

A new copy of IRIS comes pre-loaded with the core capabilities listed in the Goal. If FEMA releases new core capabilities through the Goal, the new capabilities can be added in IRIS.

### 3.4.3 Types

This support data element contains the numbered type rankings that resource typing definitions use to establish levels of capability for each resource.

A new copy of IRIS comes pre-loaded with the FEMA standard types of Type 1 - Type 7. Additional Types may be added with updates from RTL. You can add additional type rankings as needed.

## 3.5 Resource Typing Definition Support Data

Resource typing support data is information that classifies a resource and describes its capabilities. Your copy of IRIS shares all its resource typing support data across all its organizations.

If your agency chooses to use only the standard National Tier definitions, you'll rarely need to do anything with this support data. However, if your agency chooses to extend the standard definition set by adding its own local definitions (as described in **Section 6.2: Working with Local Tier Definitions**), you may need to add additional elements to this support data.

### 3.5.1 Resource Typing Definitions

Resource typing definitions are standards which you can use to describe the roles and capabilities of individual resources. Because of the complexity and importance of these definitions, they have their own chapter of this guide: **Section 6.0: Working with Definitions and Qualifications**.

### 3.5.2 Kinds

Kinds describe broad classes of similar resources. NIMS defines teams, equipment, supplies, vehicles, and aircraft as basic kinds of resources. A new copy of IRIS comes pre-loaded with the NIMS and FEMA standard resource kinds. You can add additional kinds as needed.

### 3.5.3 Components, Metrics, and Capabilities

Although components, metrics, and capabilities are three separate items on the support data menu, we've grouped them under this heading because they're so closely related. In a resource typing definition, each of the resource's overall capabilities – the measurable things it has or tasks it can perform – is composed of a component, a metric, and a capability.

- A *component* is a sub-element of the overall resource. It can be a vehicle, a piece of equipment, a group of personnel, or a level of training inherent to those personnel.
- A *metric* is a measurement standard for one aspect of a component. Examples include size, endurance, capacity, range, flow rate, and number per resource unit.

- A *capability* describes what the metric is measuring.

In a resource typing definition, each set of component, metric, and capability then links to a quantitative value that sets the minimum capability of each type within that definition.

The following table shows how a component, metric, and capability fit together to define the capabilities of several sample resources.

**Table 3: Component, Metric, and Capability Examples**

Resource	Component	Metric	Capability	Type	Attribute
Field Kitchen Unit	Equipment	Maximum Daily Meal Count	Unit output: meals served	Type 1	20,000
				Type 2	20,000 or fewer
				Type 3	10,000 or fewer
	Personnel	Per unit	Direct Services and Support	Type 1	40
				Type 2	30
				Type 3	20
Helicopters, Firefighting	Vehicle	Gallons		Type 1	700
				Type 2	300
				Type 3	100
				Type 4	75
Swiftwater/Flood Search and Rescue Team	Personnel	Minimum number Helicopter/Aquatic Rescue Operations		Type 1	4
				Type 2	2
Mass Casualty Support Vehicle	Equipment to treat/triage patients	Number of patients		Type 1	100
				Type 2	50
				Type 3	25

### 3.6 Position Qualification Support Data

Position qualification support data is information that helps classify and describe personnel. Your copy of IRIS shares all its position qualification support data across all its organizations.

If your agency chooses to use only the standard National Tier definitions, you'll rarely need to do anything with this support data. However, if your agency chooses to extend the standard definition set by adding its own local definitions (as described in **Section 6.2: Working with Local Tier Definitions**), you may need to add additional elements to this support data.

#### 3.6.1 Criteria Categories

Criteria categories are the categories into which a person's qualifications may be grouped—education, training, experience, etc.

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## 3.7 Search Support Data

Each supporting data element is searchable from its list page. The basic search function will filter through different fields for each type of support data, always at least searching by the name. Beside the search box is a grey circle with an “i” in it. If you hover your mouse over the circle, a tool tip will appear with the exact search fields for the specific support data. Enter the target word or phrase for which you want to search in the text box and click the ***Search*** button.

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## 4.0 Working with Resources

### 4.1 Create Resources

**Note:** If national tier resource typing definitions are not displaying in IRIS, contact the system administrator and/or typing library manager. Resource typing definitions must be downloaded from RTLT before they are viewable in IRIS.

If you have access to more than one organization in IRIS, your present **Organization** can be found in the top righthand corner of the page. The organization shown is the IRIS organization that maintains the record of this resource. This isn't necessarily the same as the real-world organization that actually owns the resource. For more information on how IRIS uses organizations to sort and classify resource data, see **Section 2.2.2: Organizations** (and, if you need even more detail, refer to the administrator instructions in **Appendix A: Configuring IRIS [System Administrator Guidance]**). If you have access to more than one organization, select which organization the resource is assigned to from the dropdown in the header menu.

**Caution:** IRIS does not allow you to move resources between organizations. Once you add a resource, it is permanently assigned to the organization in which you first added it.

IRIS offers two simple ways to add resources. If you are familiar with the resource typing definitions and types, you can quickly add a resource by selecting **Resources** from the header menu then select **Create Resource**. If you are not familiar with the resource typing definitions and types, you can select **Typing Library** from the header menu and review the different definitions. Once you have selected a definition to view, you are able to review the definitions details. IRIS has implemented a Resource Typing Calculator to assist you in calculating a resource's type. Once you have selected the appropriate cells that describe your resource, a **Create Resource** button appears at the bottom of the page. Once selected, you will be taken to a create resource page.

The create resource page will allow you to enter the resource information. Required fields and are marked with a red asterisks (\*). Unlike previous versions, IRIS will now let you add a resource with a minimal amount of information – only requiring a resource name and status. However, the resource will not be mutual aid ready until the resource name, status, definition, home location with location details, present location with location details, point of contact, and owner are entered. Some expanded selections will show a field with a red asterisks if you have selected to add new information. For example, if you have selected to enter a new home location, the home location name is now required.

Once the organization is selected and you have determined a resource entry method, add the basic resource information:

- **Name:** The unique name by which the resource is known. In lists of resources, this is how IRIS will identify the resource.
- **Aliases:** Any other names by which the resource is known, whether formally or informally. These can be radio call signs, license numbers, nicknames, or anything else that may help users identify the resource.
- **Status:** The resource's current status or readiness state. IRIS provides five statuses from which to choose:
  - **Available:** Usable for operations; unassigned.
  - **Committed:** Assigned to an incident but not yet deployed to the field.
  - **Decommissioned:** Still in inventory but permanently unavailable for service.
  - **In Use:** Deployed to an incident or otherwise involved in operations.
  - **Out of Service:** In maintenance, in recovery and refit, or otherwise unavailable for service.
  - **Temporarily Unavailable:** Currently unavailable for service but expected to be available soon.

To the right is an optional **Image** of the resource that is attached to its record. To add an image, select **Browse** or **Choose File**<sup>4</sup> and drill down to the appropriate image. Once you have saved your data, a thumbnail image (scaled-down copies of the original image, made smaller to save screen space) will be

<sup>4</sup> If you are using Firefox or Internet Explorer, you will see a Browse button. Google Chrome has a Choose File button.

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available. To see a full-size version of an image, click its thumbnail. Once saved, you can also remove the image by clicking **Remove**.

Beneath the **Name**, **Alias**, **Status**, and **Image** is the resource support data that provides identifying and supplemental information on the resource. Some of the sections can have one or more separate entries associated with it. Note that you can save your resource at any time by selecting **Save** at the bottom of the page. The support data sections are:

- **Resource Typing Definition:** The resource typing definition that applies to the resource. This can be either a FEMA national tier definition or a local tier definition.<sup>5</sup> This also includes the resource type, which is the resource's level of capability within its assigned definition. Most resource typing definitions include multiple resource types, with the lowest number ("Type 1") indicating the greatest capability. Select a resource typing definition from the drop down list. Once you have made your selection, IRIS automatically populates the Definition fields. Click the dropdown box beside **Type** to select the resource type. If you are unsure of the type, once a definition is selected, you can select to **View Details** of the definition and type. This will open a new tab or window displaying a Resource Typing Calculator and the details of your chosen resource typing definition. To calculate your resource's type, select the cells that are applicable to your resource. After your selections are made, you may click back to the original tab or window with your previously entered data and select the calculated type in the **Type** dropdown list. Alternatively, after calculating your resource's type, click the **Create Resource** button at the bottom of the page to launch a new create resource page with the chosen definition and type.
- **Mutual Aid Readiness:** Deploying a resource in response to a mutual aid request goes more smoothly if certain information about that resource is available. This section indicates whether the resource includes the required information to be mutual aid ready.
  - If a resource is mutual aid ready, a check mark in a green circle will appear beside the section.
  - If the resource is not mutual aid ready, a yellow triangle with an exclamation mark in it will be present. The expanded section will list the missing information needed to make the resource mutual aid ready.
- **Home Location:** The resource's permanent storage location, base, or office. If the home location is already entered in the system, you can select it from the dropdown box. If you need to enter a new home location, select **New** from the dropdown and enter the information.
- **Present Location:** The resource's current storage location, base, office, or deployment assignment. If the present location is already entered in the system, you can select it from the dropdown box. If you need to enter a new location, select **New** from the dropdown. If the present location is the same as the home location of the resource, check the **Same as Home** checkbox.
- **Point of Contact:** Individuals who are points of contact for communication related to the resource. To add a POC, select **Add**. The first dropdown is to select the type of contact. Only two Points of Contact can be entered – a Deployment POC and a Primary POC. In the second

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<sup>5</sup> Local tier definitions typically are used for local resources that don't conform to any federal definition and aren't available for interstate mutual aid. For more information on setting up and using these definitions, see **Section 6.2: Working with Local Tier Definitions**.

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dropdown you can choose an individual or group POC if they are already in the system, or select **New** to enter a new individual or group contact. Only one phone number per type can be added from this page and can be selected from the dropdown beside **Phone**. If additional phone numbers, contact group members, or other information needs to be added, it can be added by editing the support data for the contact or contact group. See **Sections 3.1.1: Contacts** and **3.1.2: Contact Groups** for additional information. To add a second Point of Contact, select **Add** under the expanded section and enter the information. Once two POCs are added, **Add** is no longer available. If you need to remove a contact, select **Remove**.

- **Owner:** The agency, company, person, or other entity that owns the resource. The owner of a resource may be different than the point of contact. If the owner is already in the system, you can select it from the dropdown. Otherwise, select **New** to enter in the owner name and description. Only one owner can be selected at a time. To remove an owner, change the dropdown selection to **None**.
- **Manufacturer/Model:** The company which made the resource and the model name under which it was sold. Obviously, these won't apply to personnel or teams, only to equipment. If the manufacturer and/or model are already in the system, you can select them from the dropdown boxes. If you need to enter new information, select **New** from the dropdown and enter in the new information. This section also includes a free form text box for the **Serial Number**; the resource's unique identifying number. This is a real-world inventory control number or other value used in official records.
- **Custom Attributes:** As the name suggests, a custom attribute is a customized field that your agency can add to resource records. This can contain whatever information is necessary that the standard fields don't already cover. Custom attributes must be defined before they are added to a resource – see **Section 3.1.4: Custom Attributes**. To add a custom attribute value to a resource, select **Add** and make a selection from the first dropdown. If the custom attribute has shared values, a second dropdown will be available. You can select a value from the second dropdown or add a new value by selecting **New** and entering the value in the text box. If the custom attribute does not have reusable values, enter a value in the text box.
- **Certifications:** Official qualifications, certifications, or licenses associated with the resource. To add a certification, select **Add** under the expanded Certifications section and enter the information or select a certification from the dropdown. If you need to add additional certifications or remove certifications, you can do so by selecting the **Add** and **Remove** buttons.
- **Contracts:** Purchase, lease, rental, or other financial agreements associated with the resource. To add a contract to the resource, expand the section and select **Add**. If the contract is already entered in the system, select it from the dropdown. If you need to enter new contract information, select **New** from the dropdown and enter the data in the **Name**, **Description**, and **Cost Per Day** fields. If you need to add additional contracts or remove associated contracts, you can do so by selecting the **Add** and **Remove** buttons.
- **Files:** Documents or other files attached to the resource record. To add a file, select **Add** under the expanded Files section. Click the **Browse** or **Choose File**<sup>4</sup> button and drill down to the file you would like to add. If you would like to remove the file, select **Remove**. If you need to add additional files, select **Add**. To open or download a file, click its associated link.



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- **Links:** External Web addresses associated with the resource record. If you would like to add a link to the resource, select **Add**. Enter the **Display Text** and the **URL**. If you need to add additional links or remove links, you can do so by selecting the **Add** and **Remove** buttons. To open a link, click its name. It will open in a new browser tab or window.
  - **Notes:** Free-form text box to house any additional information or notes regarding the resource, with a maximum of 4,000 characters.
  - **Deployment Information:** Information needed to request a resource, to include:
    - **Minimum Lead Time:** The minimum amount of time a resource needs to be deployable for incident or mutual aid response, in hours, and must be entered as a numerical value.
    - **Maximum Deployment Time:** The maximum amount of time a resource can be deployed or involved in a response before it needs to be pulled back for maintenance, recovery, or resupply, in days, and must be entered as a numerical value.
    - **Restrictions:** Any restrictions placed on the resource use, capabilities, etc.
    - **Request Instructions:** Any information on how to go about requesting the resource.
    - **Reimbursement Process:** Any information regarding the reimbursement process.
    - **Release and Return Instructions:** Any information regarding the release and return of the resource.
    - **Sustainability Requirements:** Any information regarding sustainability requirements.

Once the supporting data is complete, you can select to **Save**, **Save and Close**, or **Cancel**. If you click **Cancel**, IRIS discards any changes you've made and returns to the Resource list page.

**Caution:** IRIS times out after 60 minutes of inactivity. Any pending changes will be lost.

## 4.2 View Resources

You can view resources in IRIS by selecting the **Resources** tab. On the left side of the page, under the Create Resource header, you will see **Name**, **Alias**, **Status**, and **Actions**. Resources can be sorted by their name, alias, and status in an ascending or descending order. Potential available actions are **View**, **Edit**, and **Delete**. Actions will be based on your level of permissions.

## 4.3 Search Resources

Like most data elements, resource records are searchable. The basic search function is on the Resources page (**Resources** from the header menu or the IRIS Home page). A link for the **Advanced Search** is also available at the top of the page.

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### 4.3.1 Basic Search

The basic search function will filter through the resource name, alias, and status. Enter the target word or phrase for which you want to search in the text box and click the **Search** button. For a more robust search, use the advanced search feature.

### 4.3.2 Advanced Search

The advanced search uses filters to search for resources. On the Resources page, click the **Advanced Search** link.

Enter your search criteria and click the **Search** button. Results will display at the bottom of the page. To perform another search or clear the current filters, click the **Clear** button.

To view the resource data of another IRIS organization, add the organization in the **Internal/External Organizations** box or select **All** from the list items.

## 4.4 Clone Resources

To clone a resource, select to **View** a resource. At the bottom of the page click the **Clone** button. IRIS prompts you for the number of duplicates to create. Enter a numerical value and click **Clone**. IRIS creates the number of duplicates you entered, renaming each one with the original's name and "Copy X" (where "X" is a unique number). All of the original resource's information is copied into each new resource, *except*:

- Status (the clone status will default to Available)
- Serial Number

If you create only one duplicate, IRIS opens the Edit Resource page for the new resource, enabling you to change the attributes that differ from the original resource. If you create more than one duplicate, IRIS opens the Resources list page, enabling you to edit each new resource and change its differing attributes in turn.

**Note:** When cloning, you can only clone to a maximum of 100 duplicates at a time.

## 4.5 Edit Resources

To edit a resource in IRIS, select **Resources** from the header menu. Once you locate the resource to edit, select the **Edit** link under Actions. You will be taken to an edit page, as discussed in **Section 2.3.3: "Edit" Pages**.

### 4.5.1 Change Resource Status

A resource's status in IRIS is an indicator of its current condition and availability. The resource statuses are:

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- **Available:** Usable for operations; unassigned.
  - **Committed:** Assigned to an incident but not yet deployed to the field.
  - **Decommissioned:** Still in inventory but permanently unavailable for service.
  - **In Use:** Deployed to an incident or otherwise involved in operations.
  - **Out of Service:** In maintenance, in recovery and refit, or otherwise unavailable for service.
  - **Temporarily Unavailable:** Currently unavailable for service but expected to be available soon.

To update a single resource's status, edit that resource and change its *Status* field.

To update the status of multiple resources at once, use the basic or advanced search feature (see **Section 4.3.1: Basic Search** or **Section 4.3.2: Advanced Search**) to select the resources you want, then click the **Bulk Update** button. This opens the Bulk Edit Resource page. Change the *Status* field to the status you want to apply to all selected resources, check the box next to *Status*, and click the **Update** button.

## 4.6 Delete Resources

**Caution:** IRIS has no un-delete function. If you click the **Delete** button on a delete page, deletion is permanent. The selected data element cannot be recovered without restoring the entire database from a backup, if a backup is available. See **Section A.9.1: Backup/Restore** for more information regarding backups.

A resource can be deleted several ways. A **Delete** link is listed under **Actions** on the Resource list page. Resources can also be deleted while viewing or editing the resource. Once you select to delete the resource, IRIS will ask if you are sure you want to delete the resource. You can select to **Delete** or **Cancel** and be returned to the Resource list page.

## 4.7 Bulk Updates or Bulk Delete

**Caution:** IRIS has no un-delete function. If you click the **Delete** button on a delete page, deletion is permanent. The selected data element cannot be recovered without restoring the entire database from a backup, if a backup is available. See **Section A.9.1: Backup/Restore** for more information regarding backups.

A bulk update can be made to all of the resources within your organization, or narrowed by using a basic search or an advanced search, if necessary. The resources shown on the page can be checked to be included the bulk update. Perform a bulk update by selecting **Resources** from the header menu, then click the **Bulk Update** button at the bottom of the page. Once all of updates are entered, click the **Update** button to update the resources with the new information, or click **Cancel** to return to the Resource list page.

To perform a bulk delete, if necessary, perform a basic or advanced search to narrow your resources to only those you would like to delete, then select the **Bulk Delete** button at the bottom of the page. Select the **Delete** button to remove those resources, or **Cancel** to return to the Resource list page.

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## 4.8 Export Resource Information to a File

IRIS offers three types of file exports – CSV, KML, and XML. To export the entire list of resources within an organization, select **Resources** from the header menu and select the type of export you prefer. You can narrow your resource list by using the basic or advanced search, if necessary. Once the results are displayed, you can select the **Export CSV**, **Export KML**, or the **Export XML** button.

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## 5.0 Working with Personnel

### 5.1 Create Person

**Note:** If national tier position qualifications are not displaying in IRIS, contact the system administrator and/or typing library manager. Position qualifications must be downloaded from RTLTL before they are viewable in IRIS.

If you have access to more than one organization in IRIS, your present **Organization** can be found in the top righthand corner of the page. The organization shown is the IRIS organization that maintains the record of this person. For more information on how IRIS uses organizations to sort and classify personnel data, see **Section 2.2.2: Organizations** (and, if you need even more detail, refer to the administrator instructions in **Appendix A: Configuring IRIS [System Administrator Guidance]**). If you have access to more than one organization, select which organization the person is assigned to from the dropdown in the header menu.

**Caution:** IRIS does not allow you to move personnel between organizations. Once you add a person, they are permanently assigned to the organization in which you first added them.

IRIS offers two simple ways to add a person. If you are familiar with the typing library and position qualification and types, you can quickly add a person by selecting **Personnel** from the header menu then select **Create Person**. If you are not familiar with the typing library and position qualifications and types, you can select **Typing Library** from the header menu and review the different position qualifications. Once you have selected a qualification to view, you are able to review the qualification details. IRIS has implemented a Person Typing Calculator to assist you in calculating a person's type. Once you have selected the appropriate cells that describe your person, a **Create Person** button appears at the bottom of the page. Once selected, you will be taken to a create person page.

The create person page will allow you to enter the person's information. Required fields are marked with a red asterisks (\*). A person can be added with a minimal amount of information – only requiring a person's name and status. However, the person will not be mutual aid ready until the person's name, status, duty station with location details, deployed location with location details, title, agency affiliation, email, and phone are entered. Some expanded selections will show a field with a red asterisks if you have selected to add new information. For example, if you have selected to enter a new deployed location, the deployed location name is now required.

Once the organization is selected and you have determined an entry method, add the basic information:

- **Name**
- **Status:** The person's current status or readiness state. IRIS provides five statuses from which to choose:
  - **Available:** Usable for operations; unassigned.
  - **Committed:** Assigned to an incident but not yet deployed to the field.

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- **Decommissioned:** Still in the records but permanently unavailable for service.
  - **In Use:** Deployed to an incident or otherwise involved in operations.
  - **Out of Service:** Currently unavailable for service.
  - **Temporarily Unavailable:** Currently unavailable for service but expected to be available soon.

- *Title*
- *Agency Affiliation*
- *Email*

To the right is an optional **Person Image** of the person that is attached to their record. To add an image, select **Browse** or **Choose File**<sup>6</sup> and drill down to the appropriate image. Once you have saved your data, a thumbnail image (scaled-down copies of the original image, made smaller to save screen space) will be available. To see a full-size version of an image, click its thumbnail. Once saved, you can also remove the image by clicking **Remove**.

Beneath the basic information are sections containing the personnel support data. The support data is identifying and supplemental information for the person. Some of the sections can have one or more separate entries associated with it. Note that you can save the person's record at any time by selecting **Save** at the bottom of the page. The support data sections are:

- **Phones:** Several types of phone numbers can be added, like after hours, cell, day time, fax, and other.
- **Mutual Aid Readiness:** Deploying a person in response to a mutual aid request goes more smoothly if certain information about that person is available. This section indicates whether the person's record includes the required information to be mutual aid ready.
  - If a person's record is mutual aid ready, a check mark in a green circle will appear beside the section.
  - If the record is not mutual aid ready, a yellow triangle with an exclamation mark in it will be present. The expanded section will list the missing information needed to make the record mutual aid ready.
- **Positions:** The position qualification that applies to the person. This can be either a FEMA national tier qualification or a local tier qualification.<sup>7</sup> This also includes the type, which is the level of capability within its assigned qualification. Some qualifications include multiple types, with the lowest number ("Type 1") indicating the greatest capability. Select a qualification from

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<sup>6</sup> If you are using Firefox or Internet Explorer, you will see a Browse button. Google Chrome has a Choose File button.

<sup>7</sup> Local tier definitions typically are used for local definitions that don't conform to any federal definition and aren't available for interstate mutual aid. For more information on setting up and using these definitions, see **Section 6.2: Working with Local Tier Definitions**.

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the drop down list. Once you have made your selection, IRIS automatically populates the Positions fields. Click the dropdown box beside **Type** to select the type. If you are unsure of the type, once a qualification is selected, you can select to **View Details** of the qualification and type. This will open a new tab or window displaying a Person Typing Calculator and the details of your chosen position qualification. To calculate the person's type, select the cells that are applicable to the person. After your selections are made, you may click back to the original tab or window with your previously entered data and select the calculated type in the **Type** dropdown list. Alternatively, after calculating the person's type, click the **Create Person** button at the bottom of the page to launch a new create person page with the chosen qualification and type.

- **Supervisor:** The person's reporting supervisor. If the supervisor is already entered in the system, you can select them from the dropdown box. If you need to enter a new supervisor, select **New** from the dropdown and enter the information. Supervisor information can be added and edited under the **Support Data** tab's **Contacts** section.
- **Duty Station:** The person's current location, base, office, or deployment assignment. If the duty station is already entered in the system, you can select it from the dropdown box. If you need to enter a new location, select **New** from the dropdown.
- **Deployed Location:** The person's deployed location, office, or deployment assignment. If the deployed location is already entered in the system, you can select it from the dropdown box. If you need to enter a new location, select **New** from the dropdown. If the deployed location is the same as the duty station, check the **Same as Duty Station** checkbox.
- **Contracts:** Any type of contracts associated with the person.
- **Training:** Classified as education, training, experience, and license/certifications. Fields for the training name, description, number, and expiration are available.
- **Notes:** Free-form text box to house any additional information or notes regarding the person or their training, with a maximum of 4,000 characters.
- **Custom Attributes:** As the name suggests, a custom attribute is a customized field that your agency can add to personnel records. This can contain whatever information is necessary that the standard fields don't already cover. Custom attributes must be defined before they are added to a resource – see **Section 3.1.4: Custom Attributes**. To add a custom attribute value to a record, select **Add** and make a selection from the first dropdown. If the custom attribute has value that is reusable, a second dropdown will be available. You can select a value from the second dropdown or add a new value by selecting **New** and entering the value in the text box. If the custom attribute does not have reusable values, enter a value in the text box.
- **Files:** Documents or other files attached to the record. To add a file, select **Add** under the expanded **Files** section. Click the **Browse** or **Choose File**<sup>4</sup> button and drill down to the file you would like to add. If you would like to remove the file, select **Remove**. If you need to add additional files, select **Add**. To open or download a file, click its associated link.
- **Links:** External Web addresses associated with the personnel record. If you would like to add a link to the record, select **Add**. Enter the **Display Text** and the **URL**. If you need to add additional

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links or remove links, you can do so by selecting the **Add** and **Remove** buttons. To open a link, click its name. It will open in a new browser tab or window.

- **Deployment Information:** Information needed to request a person, to include:
  - **Minimum Lead Time:** The minimum amount of time a person needs to be deployable for incident or mutual aid response, in hours, and must be entered as a numerical value.
  - **Maximum Deployment Time:** The maximum amount of time a person can be deployed or involved in a response before they need to return, in days, and must be entered as a numerical value.
  - **Restrictions:** Any restrictions placed on the person, their capabilities, etc.
  - **Request Instructions:** Any information on how to go about requesting the person for deployment.
  - **Reimbursement Process:** Any information regarding the reimbursement process.
  - **Release and Return Instructions:** Any information regarding the release and return of the person.

Once the supporting data is complete, you can select to **Save**, **Save and Close**, or **Cancel**. If you click **Cancel**, IRIS discards any changes you've made and returns to the personnel list page.

**Caution:** IRIS times out after 60 minutes of inactivity. Any pending changes will be lost.

## 5.2 View Personnel

You can view personnel records in IRIS by selecting the **Personnel** tab. On the left side of the page, under the Create Person header, you will see **Name**, **Status**, and **Actions**. Personnel can be sorted by their name, and status in an ascending or descending order. Potential available actions are **View**, **Edit**, and **Delete**. Actions will be based on your level of permissions.

## 5.3 Search Personnel

Like most data elements, personnel records are searchable. The basic search function is on the Personnel page (**Personnel** tab from the header menu or the button on the IRIS Home page). A link for the **Advanced Search** is also available at the top of the page.

### 5.3.1 Basic Search

The basic search function will filter through the person's name and status. Enter the target word or phrase for which you want to search in the text box and click the **Search** button. For a more robust search, use the advanced search feature.



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## 5.3.2 Advanced Search

The advanced search uses filters to search for resources. On the Personnel page, click the *Advanced Search* link.

Enter your search criteria and click the *Search* button. Results will display at the bottom of the page. To perform another search or clear the current filters, click the *Clear* button.

To view the personnel data of another IRIS organization, add the organization in the *Internal/External Organizations* box or select *All* from the list items.

## 5.4 Clone Personnel

To clone a person's record, select to *View* a person. At the bottom of the page click the *Clone* button. IRIS prompts you for the number of duplicates to create. Enter a numerical value and click *Clone*. IRIS creates the number of duplicates you entered, renaming each one with the original's name and "Copy X" (where "X" is a unique number). All of the original person's information is copied into each new resource, *except*:

- Status (the status will default to Available)
- Email
- Training

If you create only one duplicate, IRIS opens the Edit Person page for the new person, enabling you to change the attributes that differ from the original person. If you create more than one duplicate, IRIS opens the Personnel list page, enabling you to edit each new record and change its differing attributes in turn.

**Note:** When cloning, you can only clone to a maximum of 100 duplicates at a time.

## 5.5 Edit Personnel

To edit a personnel record in IRIS, select *Personnel* from the header menu. Once you locate the record to edit, select the *Edit* link under Actions. You will be taken to an edit page, as discussed in **Section 2.3.3: "Edit" Pages**.

### 5.5.1 Change Personnel Status

A person's status in IRIS is an indicator of their current condition and availability. The personnel statuses are:

- **Available:** Usable for operations; unassigned.
- **Committed:** Assigned to an incident but not yet deployed to the field.
- **Decommissioned:** Still in the records but permanently unavailable for service.

- 
- ***In Use***: Deployed to an incident or otherwise involved in operations.
  - ***Out of Service***: Currently unavailable for service.
  - ***Temporarily Unavailable***: Currently unavailable for service but expected to be available soon.

To update a single person's status, edit that record and change its ***Status*** field.

To update the status of multiple records at once, use the basic or advanced search feature (see **Section 5.3.1: Basic Search** or **Section 5.3.2: Advanced Search**) to select the records you want, then click the ***Bulk Update*** button. This opens the Bulk Edit Personnel page. Change the ***Status*** field to the status you want to apply to all selected records, check the box next to ***Status***, and click the ***Update*** button.

## 5.6 Delete Personnel

**Caution:** IRIS has no un-delete function. If you click the ***Delete*** button on a delete page, deletion is permanent. The selected data element cannot be recovered without restoring the entire database from a backup, if a backup is available. See **Section A.9.1: Backup/Restore** for more information regarding backups.

A record can be deleted several ways. A ***Delete*** link is listed under ***Actions*** on the Personnel list page. Records can also be deleted while viewing or editing the record. Once you select to delete the record, IRIS will ask if you are sure you want to delete the person. You can select to ***Delete*** or ***Cancel*** and be returned to the Personnel list page.

## 5.7 Bulk Updates or Bulk Delete

**Caution:** IRIS has no un-delete function. If you click the ***Delete*** button on a delete page, deletion is permanent. The selected data element cannot be recovered without restoring the entire database from a backup, if a backup is available. See **Section A.9.1: Backup/Restore** for more information regarding backups.

A bulk update can be made to all of the records within your organization, or narrowed by using a basic search or an advanced search, if necessary. The records shown on the page can be checked to be included the bulk update. Perform a bulk update by selecting ***Personnel*** from the header menu, then click the ***Bulk Update*** button at the bottom of the page. Once all of updates are entered, click the ***Update*** button to update the records with the new information, or click ***Cancel*** to return to the Personnel list page.

To perform a bulk delete, if necessary, perform a search or an advanced search to narrow your records to only those you would like to delete, then select the ***Bulk Delete*** button at the bottom of the page. Select the ***Delete*** button to remove those people, or ***Cancel*** to return to the Personnel list page.

## 5.8 Export Personnel Information to a File

IRIS offers three types of file exports – CSV, KML, and XML. To export the entire list of personnel within an organization, select ***Personnel*** from the header menu and select the type of export you prefer.

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You can narrow your personnel list by using the basic or advanced search, if necessary. Once the results are displayed, you can select the *Export CSV*, *Export KML*, or the *Export XML* button.

## 5.9 Relationship Between Personnel and Contacts

All personnel added to IRIS are also stored as contacts. (All contacts are not stored as personnel, however, since limited information is provided when creating a contact.) Since all personnel are contacts, basic information for that person (name, title, agency, email, phone numbers) can be edited for that person either by editing their contact record or by editing their personnel record.

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## 6.0 Working with Definitions and Qualifications

The following subsections describe how to ensure your copy of IRIS has the latest national tier definitions published through RTLTL and how to add and maintain your local tier definitions. You may also want to refer to **Section 3.3: Personnel Support Data**, which explains the support data elements that go into both national tier and local tier definitions.

### 6.1 Updating Definitions and Qualifications from RTLTL

**Note:** This section applies only to Typing Library Managers and System Administrators. National tier resource typing definitions must be downloaded from RTLTL before they are viewable in IRIS. If resource typing definitions are not displaying in IRIS, contact the System Administrator and/or Typing Library Manager.

If IRIS has an Internet connection, it periodically checks RTLTL for new, updated, and obsolete definitions and qualifications. The IRIS Home page contains the Resource Typing Library Dashboard, which shows you *Pending National Tier Definitions* and *Existing Definitions*. If any pending definitions or qualifications are listed, a link will be provided to *Update Definitions*.

To download these updates, click the *Update Definitions* link on the IRIS Home page. This opens the Definition Update page, which provides a summary of pending national tier definitions and a summary of existing definitions in IRIS. Select the **Download** button to navigate to the Download Definitions page. The Download Definitions page provides a complete list of national tier resource typing definitions and qualifications available for download, as well as available actions for you to take. Available actions may include:

- **Add New Definition:** This action will download the national tier definition to IRIS.
- **Convert Definition to Local Tier:** This action will convert the previously downloaded national tier definition in IRIS to a local tier definition.
- **Overwrite Local Definition:** This action will overwrite the previously downloaded national tier definition in IRIS with the latest changes from FEMA.
- **Remove Obsolete Definition:** This action will remove the previously downloaded national tier definition from IRIS.

Once an action has been chosen for each of the pending national tier definitions, select the **Download** button at the bottom of the page.

**Caution:** If you are preparing to download a definition with a status of Obsolete, you are encouraged to ensure that none of your resources or personnel are assigned to the definition before you select the action to **Remove Obsolete Definition**. Taking this action will un-type any resources or personnel tied to that definition. If any resources or personnel are assigned to the definition, an *Affected* column will be displayed. Click the *Show/Hide* link to view any affected records. If you determine that you would not like to remove the obsolete definition, you may choose to **Convert Definition to Local Tier**.

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## 6.2 Working with Local Tier Definitions

Resource typing definitions and position qualifications exist to ensure all response partners have a consistent understanding of what a given resource or personnel is and what it/they can do. To help ensure this consistency, it's best if your organization's typing efforts focus on national tier definitions – the national standard definitions published by FEMA through RTLIT. However, if national tier definitions don't cover all your resources or personnel, you also can develop your own local tier definitions for local use.

Partial examples of local tier definitions consist of the following:

Category	Resource	Kind
Law Enforcement Operations	Patrol Car	Vehicle
Law Enforcement Operations	Patrol Truck	Vehicle

### 6.2.1 Creating a Local Tier Resource Definition

To create a local tier resource definition, select **Typing Library** from the IRIS home page. At the top of the list page, click the link to **Create Resource Typing Definition**. Enter the typing definition information. You can add additional capabilities by selecting the **Add Capability Row** link, or add additional Comments, References, Files, and Links by selecting the corresponding **Add** link below each section. If the capabilities will only have three types, you can delete **Type 4** by selecting the red X beside **Type 4**. If you need to add the **Type** column back, an **Add Type Column** link will become available if there are more types available than currently displayed. Once all of the information is entered, select **Save** to save the information. IRIS will give you the opportunity to review the definition information. You can select the **Publish** button at the bottom of the screen. Once selected, IRIS will verify you want to publish the new resource typing definition. **Cancel** will return you to the Typing Library list page. After the resource typing definition has been published, you are able to add resources to the new definition.

### 6.2.2 Creating a Local Tier Position Qualification

To create a local tier position qualification, select **Typing Library** from the IRIS home page. At the top of the list page, click the link to **Create Position Qualification**. Enter the position qualification information. You can add additional categories by selecting the **Add Category Row** link, or add additional Ordering Specifications or Designations, References, Notes, Files, and Links by selecting the corresponding **Add** link below each section. If the categories will only have one type, you can delete **Type 2** by selecting the red X beside **Type 2**. If you need to add the **Type** column back, an **Add Type Column** link will become available if there are more types available than currently displayed. More Types can be added from the Support Data page. Once all of the information is entered, select **Save** to save the information. IRIS will give you the opportunity to review the qualification information. You can select the **Publish** button at the bottom of the screen. Once selected, IRIS will verify you want to publish the new position qualification. **Cancel** will return you to the Typing Library list page. After the position qualification has been published, you are able to add records to the new position qualification.

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## 7.0 Data Sharing

With appropriate configuration (as described in **Section A.8 Data Sharing**), IRIS data can be shared with other IRIS installations, WebEOC, and/or other third-party systems.

### 7.1 Public Directory

A public directory was created to allow IRIS installations to discover one another. Since participation is optional, the public directory listing is not an exhaustive list of all users. Instead, it is a list of users who have opted to share their contact information with content that is actively updated. To view the public directory, select the **Public Directory** button from the IRIS Home Page. Instance information, including contact name, email, phone number, city, and state for the instance can be viewed by selecting the **Instance Name** or the **View** button.

For more information about updating your own IRIS information in the IRIS Directory, see **Section A.8.1 Directory and Metrics Data**,

### 7.2 IRIS-to-IRIS Sharing

IRIS may be given visibility into other IRIS installations from within the IRIS user interface. Access must be granted by the system administrator of the IRIS providing the data. To view resources or personnel from another instance of IRIS, navigate to the **Resources** tab or the **Personnel**, then the **Advanced Search** link. To select a specific organization to search by, click in the **Internal/External Organizations** search box. All of the organizations will appear in a drop down menu. Add any additional search criteria and select the **Search** button. For additional information regarding resource advanced searches, see **Section 4.3.2: Advanced Search**. For more information regarding advanced searches for personnel, see **Section 5.3.2: Advanced Search**.

For information about how to gain or grant visibility to another IRIS installation, see **Sections A.8.2 API Security** and **A.8.2.1 IRIS Sharing**.

### 7.3 Push to WebEOC

IRIS is able to push resource data to an individual IRIS WebEOC board or multiple ones at the same time.

Only system administrators can create, edit, or delete WebEOC configurations (see **Section A.8.4 WebEOC Configurations**). However, by default, users in the Organization Administrator, Resource Entry, or Resource Manager role can view an IRIS' WebEOC configuration and push data to those destinations.

To view WebEOC connections, navigate to the **Administration** tab, then the **WebEOC Configurations** link. From this page you may take several actions.

- Select the **View** link to view the WebEOC configuration details (such as which IRIS organizations can send data, whether data will be automatically sent, etc.).

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- Select the ***Check*** link to verify your connection with the targeted WebEOC Board. If the connection fails, you will be provided with information onscreen to help you diagnose the connection issue.
  - Select the ***Send*** link to manually send information to the WebEOC board(s) supported by that WebEOC Configuration. Alternatively, select the ***Send All*** button to manually send to all WebEOC boards simultaneously. These manual send features may be useful if the system administrator opted against automatically sending data. This may also be useful if data needs to be sent immediately, rather than waiting for the required “Send Interval” specified in the WebEOC Configuration details.

Please note that you can only send resource data from the organizations in which you are in an Organization Administrator, Resource Entry, or Resource Manager role.

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## 8.0 Working with User Accounts

**Note:** This section applies only to Organization Administrators and System Administrators. If you do not see a particular control or piece of information and think you should have access to it, contact your system administrator.

User accounts in IRIS operate on a role-based model of access and permissions. Each user account is assigned to one or more roles, and each of these roles is associated with an organization (for more information on organizations and how they affect users and data in IRIS, see **Appendix A: Configuring IRIS [System Administrator Guidance]**). These assignments determine what a user can do in each organization. If a user has no roles assigned within a given organization, that user can't view or modify any of that organization's data. The following table provides an example of this, using the default roles described in **Section 8.1: Default User Roles**.

**Table 4: Example of Organization-Specific Roles**

Organization	Role	What the user can do with this organization's data
Central City Fire Department	Organization Administrator	View, edit, create, and delete all the organization's support data elements. View, edit, create, and delete all the organization's resources and personnel. View, edit, create, and delete all the organization's users. <sup>8</sup>
Central City Hospital	Resource Manager	View, edit, create, and delete all the organization's support data elements related to resources. View, edit, create, and delete all the organization's resources.
Metropolis Fire Department	Personnel Entry	View, edit, and create all the organization's support data elements related to personnel. View, edit, and create all the organization's personnel.
Central City Police Department	Resource Viewer	View all the organization's resources. View the details of each record's support data (e.g., attached contracts).
Liberty County Sheriff's Office	None	Nothing; the user can't even select this organization in the Organization drop-down.

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<sup>8</sup> The Organizational Administrator can only delete user accounts if that user is **only** associated with that organization. If the user has a role in another organization, the Organizational Administrator will not be able to delete the user. However, if a user has roles in several organizations, any of the Organizational Administrators will be able to update the user's password, even if the user has roles in other organizations.



## 8.1 Default User Roles

A new copy of IRIS comes pre-loaded with eight user roles. **Table 5: Default User Roles** provides an overview of the tasks each role can perform and the type of user who should be assigned to that role. Unless otherwise indicated, all permissions are limited to the organization level. **Appendix C: Default User Role Permissions** provides technical details on the permissions assigned to each of these roles.

**Table 5: Default User Roles**

Role	What It Can Do	Who Should Have It
Organization Administrator	<ul style="list-style-type: none"> <li>View, create, edit, and delete resources, personnel and support data.</li> <li>View, create, edit, and delete user accounts and role assignments.<sup>9</sup></li> <li>View all national tier resource typing definitions and position qualifications.</li> <li>View, create, and edit local tier resource typing definitions and position qualifications.</li> </ul>	Administrative users who are responsible for maintaining both the organization's resource and personnel records and the IRIS access of the organization's other users.
Personnel Manager	<ul style="list-style-type: none"> <li>View, create, edit, and delete personnel and related support data.</li> <li>View all resource typing definitions and position qualifications.</li> </ul>	Users who are responsible for maintaining all aspects of the organization's personnel records.
Personnel Entry	<ul style="list-style-type: none"> <li>View, create, and edit personnel and related support data.</li> <li>View all resource typing definitions and position qualifications.</li> </ul>	Users who are responsible for maintaining personnel status or entering new personnel.
Personnel Viewer	<ul style="list-style-type: none"> <li>View personnel and related support data.</li> <li>View all resource typing definitions and position qualifications.</li> </ul>	Users who need to know what personnel an organization has.
Resource Manager	<ul style="list-style-type: none"> <li>View, create, edit, and delete resources and related support data.</li> <li>View all resource typing definitions and position qualifications.</li> </ul>	Users who are responsible for maintaining all aspects of the organization's resource records.
Resource Entry	<ul style="list-style-type: none"> <li>View, create, and edit resources and related support data.</li> <li>View all resource typing definitions and position qualifications.</li> </ul>	Users who are responsible for maintaining resource status or entering new resources.
Resource Viewer	<ul style="list-style-type: none"> <li>View resources and related support data.</li> </ul>	Users who need to know what resources an organization has.

<sup>9</sup> If the user has role assignments in other organizations, the organization administrator can't delete the overall user account – only the user's access within the administrator's own organization.

Role	What It Can Do	Who Should Have It
	<ul style="list-style-type: none"> <li>View all resource typing definitions and position qualifications.</li> </ul>	
Typing Library Manager	<ul style="list-style-type: none"> <li>View national tier resource typing definitions and position qualifications for all organizations.</li> <li>Update national tier definitions and position qualifications for all organizations through IRIS's connection to RTLTL.</li> <li>View, create, edit, and delete local tier definitions and position qualifications for all organizations.</li> </ul>	Administrative users who are involved in typing efforts across all the organizations in your copy of IRIS.

### 8.1.1 System Administrator Account

In addition to the user roles described above, IRIS has a system administrator account. This account has a username of **admin**. It is the “super-user” account. It can create, edit, and delete all data elements (except national tier definitions) across your entire IRIS system. For more information on the System Administrator Account, see **Appendix A: Configuring IRIS [System Administrator Guidance]**.

## 8.2 Defining User Roles

If you need additional user roles beyond the default roles described in **Section 8.1: Default User Roles**, you can add your own. You also can edit the permissions of the default roles, but we recommend using the default roles.

### 8.3 Adding a User

Adding a user can be done by selecting **Administration** from the header menu, then selecting the **Users** link. From the Users page, you can select the **Create User** link. When creating a new user, you will select a username and a password for the new user. Once set, the username cannot be changed. The user will be prompted on their initial login to reset the password. Once a user is added, make sure to add a role to that user. Default roles are described in **Section 8.1: Default User Roles**.

### 8.4 Editing a User

To edit a user, select **Administration** from the header menu, then select the **Users** link. From the Users page, select the **Edit** link. The edit user page gives you the opportunity to edit the user's name, phone, email, and roles.

### 8.5 Reset a User's Password

To reset a user's password, select **Administration** from the header menu, then select the **Users** link. From the Users page, select the **Reset Password** link. You will be prompted to enter and confirm a new password. Password rules are listed on the Reset User Password page.

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## 8.6 Removing a User

Removing a user can also be performed from the User page (by selecting **Administration** from the header menu, then selecting **Users**). The right side of the page gives you a link to delete. Once the link is selected, you are asked if you are sure you want to delete the following user. If you are sure, click the **Delete** button. If you do not want to delete the user, select **Cancel**. You will be returned to the User list page.

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# Appendix A: Configuring IRIS [System Administrator Guidance]

## A.1 System Administrator Account

Because of its capacity to manage other user accounts, the system administrator account also serves as your master account management tool. It can reset any other account's password. However, the IRIS Help Desk has no way to reset the system administrator account's password remotely. For this reason, we strongly recommend that you store your system administrator password in a secure location, only give it to users who truly need this level of access, and use the account sparingly. Almost all necessary tasks in IRIS can be handled by regular user accounts with the Organization Administrator and Typing Library Manager roles.

## A.2 System/Technical Requirements

IRIS is designed to run on the following operating systems:

- Microsoft Windows 7 Service Pack (SP) 1
- Microsoft Windows 8
- Microsoft Windows 8.1
- Microsoft Windows 10
- Microsoft Windows Server 2008 R2
- Microsoft Windows Server 2012
- Microsoft Windows Server 2012 R2
- Microsoft Windows Server 2016

IRIS requires minimal hard drive space. The precise amount depends on the supporting Microsoft components that may need to be downloaded and installed,<sup>10</sup> but no IRIS installation will require more than 1 GB of hard drive space.

Any computer that will run one of the operating systems listed above will have sufficient processor and memory to run IRIS.

It is technically possible to install IRIS on a computer that's running a Windows operating system other than those listed above. However, because PrepToolkit staff have not tested IRIS on other operating

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<sup>10</sup> These may include Internet Information Services (IIS), Structured Query Language (SQL) Server, and .NET Framework components.

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systems, the IRIS Help Desk may have difficulty assisting you if you encounter problems with such an installation.

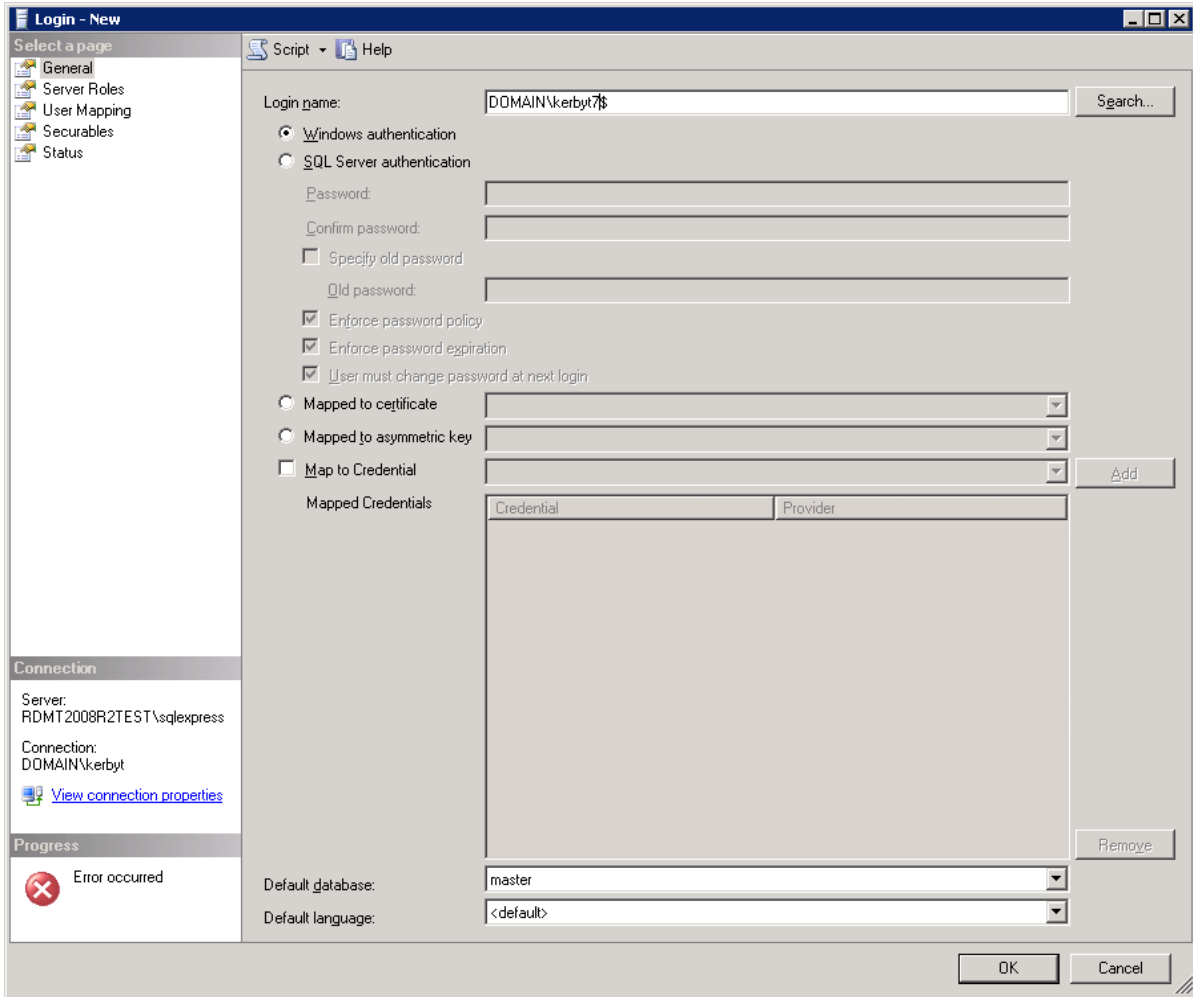
To access IRIS, you need a Web browser as outlined in **Section 2.0: Getting Started**.

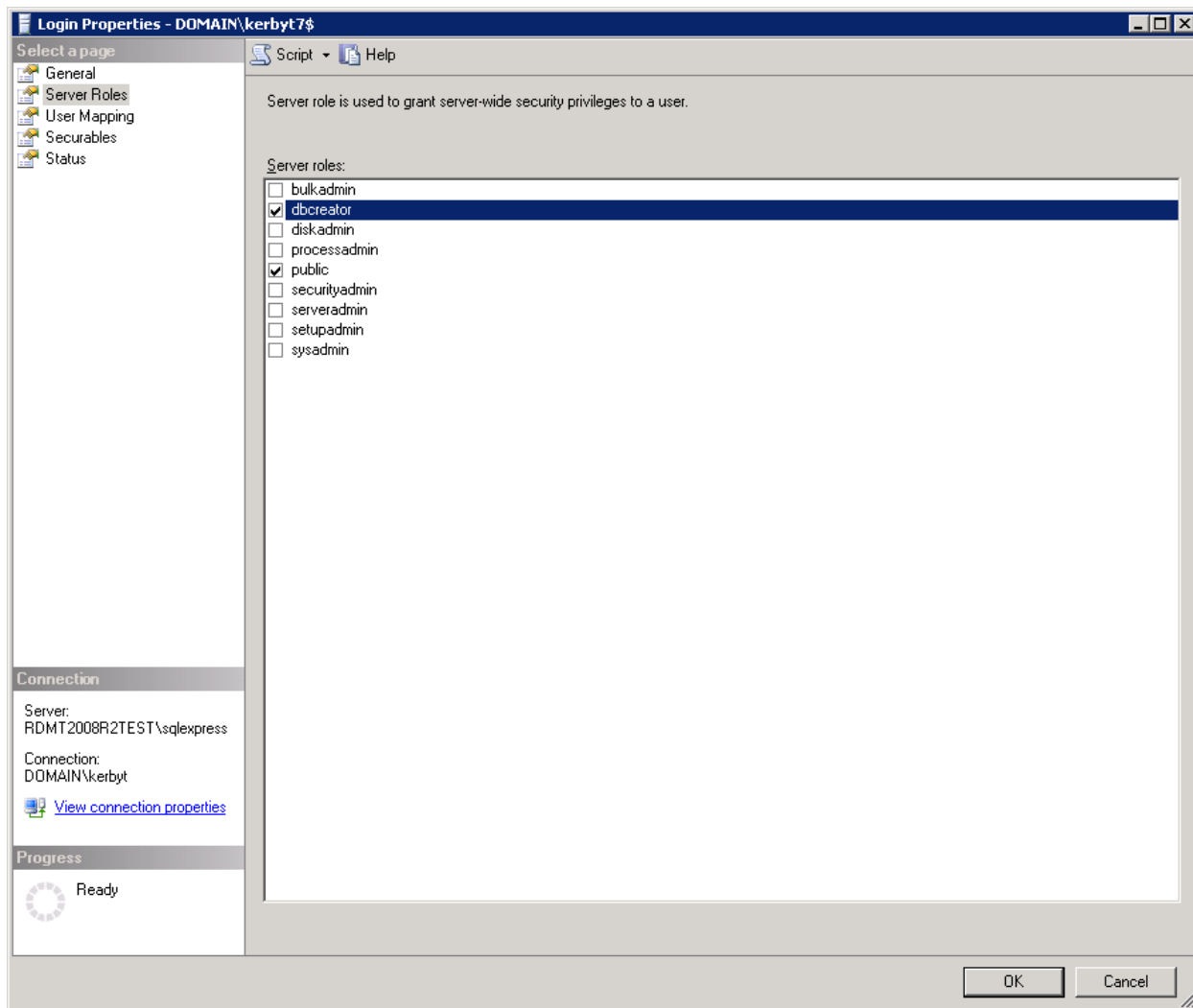
### A.3 Using an Existing SQL Server

IRIS can be used with an existing SQL server instance in lieu of using the default SQL Server Express installation option. In order for IRIS to function, an MS SQL Server instance (2008, 2008R2, 2012, or 2014; Standard or Express) needs to be in place.

If the database is to reside on a different machine than the website, you must complete the following actions for the MS SQL Server instance:

- Allow remote connections.
- Have TCP/IP enabled (via SQL Server Configuration Manager).
- Create a login account in SQL Server instance for the Web Server to use to create the new IRIS database and give that account both public and dbcreator roles. In this case we are using the machine name (computer hosting the IRIS website) for the account and are using Integrated Security with Windows Authentication.
  - Note: Microsoft strongly suggests using Windows Authentication, if possible, versus SQL Authentication (<https://docs.microsoft.com/en-us/dotnet/framework/data/adonet/sql/authentication-in-sql-server>).



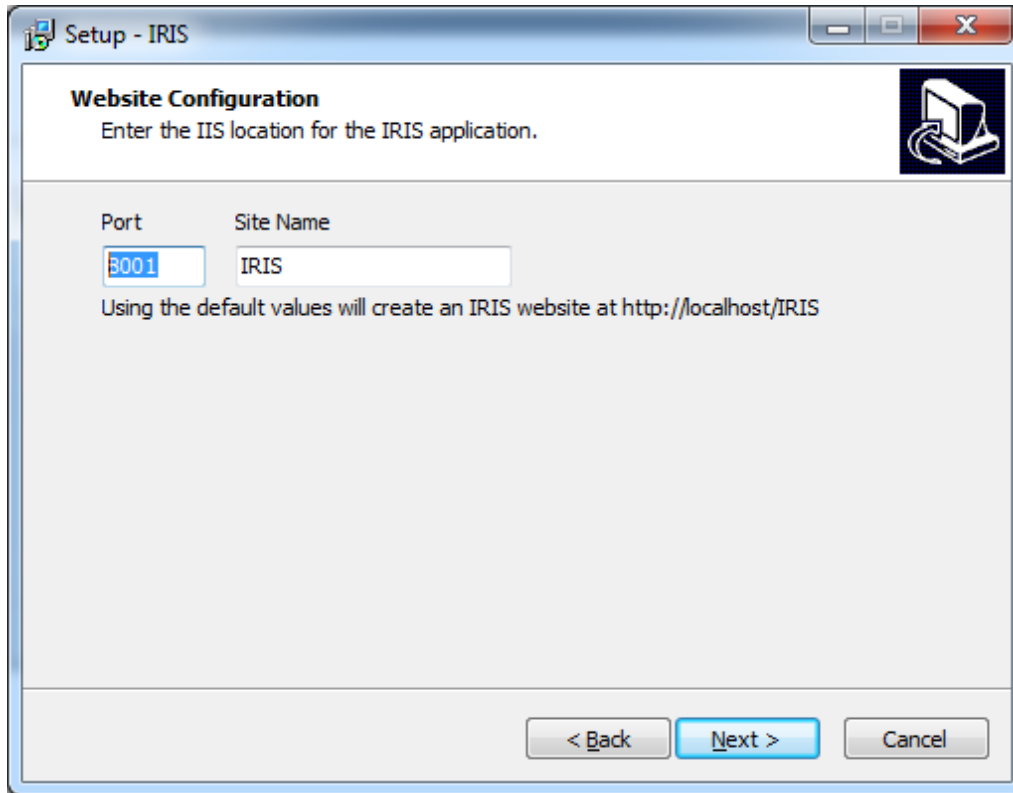


- Install IRIS on the Web Server and set it to connect to this SQL Server instance.

## A.4 Using an Existing Web Site

IRIS can be deployed to an existing website in lieu of using the default option. The default option will deploy to “Default Web Site/IRIS”. This will create a website that can be accessed locally at <http://localhost/iris>.

Providing the website location and port during installation will allow IRIS to be deployed correctly. The example below will deploy the IRIS website code to a local IRIS website that can be accessed at <http://localhost:8001/iris>.



In order to install correctly, the target website must exist in IIS prior to IRIS installation. IIS website creation and management is outside the scope of this guide.

## A.5 Initial Login and Setup

After you have installed IRIS and opened the program, you will see the IRIS Login Page. The default system administrator username is **admin** and the default password is **admin123**. After your first successful login, you will be prompted to reset your password and select three security questions and answers.

Once you have successfully set your security questions and answers, you will be directed to the Directory and Metrics Data page. Enter an Instance Name, Contact Information, Organization Information, and determine if you would like your instance listed in the IRIS public directory and which metrics you would like to send. Then select **Update**. For more information on metrics, see **Section A.8.1: Directory and Metrics Data**.

During the initial setup, it is recommended that the system administrator create the organizations, add users and their roles, and download the resource typing definitions.

## A.6 Downloading Definitions

Resource typing definitions and position qualifications must be downloaded from RTLT before they are viewable in IRIS. Upon your initial login, under the Resource Typing Library Dashboard, you will see a link to **Update Definitions**. Once you click that link, you will be directed to the Definitions Update page, which provides a summary of pending Tier 1 definitions and a summary of existing definitions in IRIS.



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Select the **Download** button to navigate to the Download Definitions page. The Download Definitions page provides a complete list of Tier 1 resource typing definitions and position qualifications available for download, as well as available actions for you to take. Definitions not previously downloaded to the IRIS system will only have one available action in the action column: **Add New Definition**. Select the **Download** button at the bottom of the page to download the pending Tier 1 definitions and qualifications to IRIS.

## A.7 Security

Security is available under **Administration** and gives you the opportunity to view and edit organizations, roles, and users.

### A.7.1 Adding Organizations

Different organizations can be added within the same instance of IRIS. Those different organizations can share or restrict information and resources as they see fit. Organizations are added by selecting **Administration** from the header menu, then selecting **Organizations**, and **Create Organization**. Enter a name for the organization and select **Create** to save the organization or **Cancel** to return to the Organization list page.

### A.7.2 Adding Roles and Users

Roles exist at the system level, therefore they span across all organizations added into the system. It is recommended that you use the eight default roles established in IRIS.

To add users, select **Administration** from the IRIS header menu, then select **Users**. Click the **Create User** link and enter the user information. Note that the username cannot be changed once the user is created. The password you provide will be a temporary password. The user will be prompted to reset their password on their first login. Select **Continue** to save the user information and proceed to the Edit User page or select **Cancel** to return to the User list page. IRIS also allows users to be imported with an XML import (**Administration** >> **Import XML**). After continuing the XML import, IRIS will display an XML Import Summary with the imported user names and computer generated passwords. If passwords are not captured at this time, they will need to be reset for each user imported.

Roles can be added to users during the creation of the user or added from the User list page (**Administration** >> **Users** >> **Edit**) from the Edit User page. To review which permissions each of the roles have, see **Appendix C: Default User Role Permissions**. To add a role to a user account, select the **Add Role** link. Select the appropriate organization and role for the user from the drop down boxes. Select **Add** to save the role for the user or **Cancel** to return to the Edit User page. If the user will have additional roles under different organizations, select **Add Role** again, then select the second organization and appropriate role.

Once the appropriate roles have been added to the user, select **Update** to save the changes, **Cancel** to return to the User list page, **View** to see the user's information, organization roles, and activity log, or **Delete** to delete the user.

To view the list of users and their associated roles within an organization, select **Administration** >> **Organization** and select the organization you wish to view the users for.

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## A.8 Data Sharing

### A.8.1 Directory and Metrics Data

The directory and metrics data page provides you with valuable information including the IRIS instance name, product version, operating system, database information, and the metrics which are optionally provided to PrepToolkit staff to inform future IRIS releases.

This page also gives you the opportunity to edit the instance name, edit contact information and organization information for your installation of IRIS, list the IRIS in the public directory, and the opportunity to edit metric information. We encourage users to send metrics, as the metrics collected by PrepToolkit staff help to ensure user needs are met during future IRIS development.

**Note:** PrepToolkit staff do not collect or track any of the actual resources stored in your installation of IRIS.

### A.8.2 API Security

IRIS allows a third-party system (known as the consuming system) to view resource information in an installation of IRIS (known as the providing system). In order for this connection to work, the providing IRIS must be publicly accessible and must have an Application Programming Interface (API) user account set up. To create an API user, select **Administration >> API Security >> Create API User**. Fill out the required fields (marked with a red asterisks [\*]). A computer generated password is provided on the screen and must be securely transmitted to the user/administrator of the third-party system. Select the organizations to be accessed by the API user (thereby granting the user the ability to see the organization's resources and personnel), then select **Save** or **Save and Close**.

#### A.8.2.1 IRIS Sharing

IRIS itself can serve as consuming system for another IRIS; IRIS allows users in one installation of IRIS (the consumer) to view resource information in another installation of IRIS (the provider). The connection between the two systems must be set up by the system administrators for both the consumer and the provider. The system administrator of the providing system will follow the steps outlined in **Section A.8.2 API Security** and provide the appropriate URL, username for the API user account, and the above mentioned password to the consuming system.

The URL which you must provide to another IRIS in order for it to connect must be of the form <https://myIRIS/api/v2/soap>, where <https://myIRIS> is the standard URL used to access your IRIS instance.

The system administrator of the consuming system will set up the connection from the **External IRIS Configurations** page (for more information, see **Section A.8.3: External IRIS Configurations**).

### A.8.3 External IRIS Configurations

To create an external IRIS configuration to view resource information in another installation of IRIS, select **Administration >> External IRIS Configurations >> Create External IRIS Configuration**. Fill out the required fields (marked with a red asterisks [\*]). Select **Save and Check** to ensure there are no errors. Select **Return**. Select **Save** or **Save and Close**.

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Once the external IRIS configuration is set up, users must be granted permissions to see the organizations in that IRIS, just as they are granted permissions in the internal IRIS. These permissions may be assigned from the Users page (**Administration >> Users**), just like with other permission assignments. Users viewing other IRISes should be granted the External IRIS API role.

## A.8.4 WebEOC Configurations

A “push-to-WebEOC” feature has been developed using the WebEOC API. The WebEOC connections can be configured to send IRIS data from all organizations or from select ones. A scheduling feature is also available to configure IRIS data to be sent at regular intervals.

A manual push option for individual organizations can be used by any roles in that organization that have both WebEOC configuration view access and update permissions for IRIS resources for that organization. By default, users assigned a role of Organization Administrator, Resource Entry, or Resource Manager can have these permissions.

### A.8.4.1 Create

To create a WebEOC configuration, work with an administrator of the specific WebEOC system to gain the required credentials to make a connection.<sup>11</sup> The following pieces of information will be needed:

- API URL
- Username
- Password
- Position
- Jurisdiction (optional)
- Incident (optional)
- Board Name

Select **Administration >> WebEOC Configurations >> Create WebEOC Configuration**. Provide a Name and Description for this particular WebEOC connection. Type the information provided by the WebEOC administrator in the remaining fields. Required fields are marked with a red asterisk [\*].

You may optionally choose to automatically send data to this WebEOC Board. If this is left unchecked, IRIS data must be sent by manually selecting a button. If the “Automatically Send Data” checkbox is selected, set the “Send Interval,” in hours, to specify how often the data should be sent.

Choose the organizations within your IRIS from which you would like to send data. If an organization is left unchecked, none of its resource data will be sent to the WebEOC board. After all of your selections

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<sup>11</sup> Detailed instructions for the WebEOC administrator are available in the IRIS WebEOC Board User Instructions packaged with the IRIS WebEOC Board.

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are made, select **Save and Check** to ensure there are no errors in the configuration. Select **Return**. Select **Save and Close**.

#### A.8.4.2 *Maintaining*

WebEOC Configurations can be maintained on the WebEOC Configurations page. Buttons to **Export CSV**, **Export XML**, **Send All**, and **Purge All** are available at the bottom of the page. Available actions for individual connections are:

- **View** the configuration information, including the API URL, if data is being automatically sent, the send interval, the organizations that are sending data, and the last time data was sent.
- **Check** the connection status.
- **Send** data to the WebEOC board.
- **Purge** data from the WebEOC board. This feature is useful if an IRIS has been restored (see **Section A.9.1 Backup/Restore**).
- **Edit** the configuration, including the API URL, Username, Password, Position, Board Name, Send Intervals, and the Organizations that are sending data.
- **Delete** the WebEOC configuration.

## A.9 Maintenance

Maintenance is available under **Administration** and gives you the opportunity to view and edit the installation and metrics data, create backups and restore from backups, import XML data files, and configure the definition updates.

### A.9.1 Backup/Restore

As with any system that houses valuable information, we recommend you backup your data on a regular basis. To create a backup, select **Backup/Restore** then **Backup**. Enter a backup name and description. Click **Backup** to create the backup or **Cancel** to return to the Backup and Restore list page. Once your backup is saved, you will see the when it was created and when it expires on the list page.

Because SQL Server requires an expiration date, backups automatically “expire” after 90 days. The functionality of backups does not change once they expire. You can cleanup expired backups by selecting the **Cleanup** link. The Cleanup Expired Backups page will list all the expired backups and gives you the opportunity to **Cleanup** and delete those backups or **Cancel** to return to the Backup and Restore list page.

The Backup and Restore list page also gives you the opportunity to view any of your backups, edit the name and/or description, restore from that backup, or delete the backup. If you choose to **Restore** from a backup, you will be asked if you are sure you want to restore the backup. You can select to **Restore** or **Cancel**.

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**Note:** When restoring from a backup, the system is restored as it was at the time the backup was creating – including users’ account passwords.

If an IRIS installation has active WebEOC configurations, it is recommended that the data for all configurations be purged and resent using the “purge” and “push” features described in **Section A.8.4.2 Maintaining**. This step will ensure resource data between IRIS and WebEOC is in sync after a restoration.

## A.9.2 Import XML

To import an IRIS XML data file, select **Import XML** then **Browse** or **Choose File**. Drill down to the XML file to import and select **Upload**. You will have the opportunity to review the import then click to **Confirm** the import or **Cancel** to return to the XML Import page. If confirmed, IRIS will show you what items have been imported.

## A.9.3 Definition Updates

If changes need to be made to the definition service configuration, select **Administration** from the home page or the header menu. Under Maintenance, select **Definition Updates**. Select the **Configure** button to update the Service URL, or the frequency IRIS checks for updates (in hours). The default settings are:

- Service URL: <https://rtlt.preptoolkit.fema.gov/api/v2/soap>.
- Check Every (hours): 2

Once changes have been made, select **Update** to save the changes or **Cancel** to return to the Definition Updates page.

## A.10 Resetting Passwords

As a system administrator, you can reset passwords for users who have forgotten their password. To reset a password, select **Administration** from the header menu, then select **Users**. On the right side of the page, you will see the action to **Reset Password**. Once clicked, you have the opportunity to reset the user’s password. The password must follow the rules on the page. The user will be prompted to reset their password the next time they log in.

# Appendix B: The IRIS Data Model

Administrators and users who work with multiple organizations may find it helpful to understand the way IRIS stores data. Every resource record is associated with a specific organization. Only users who have roles within that organization can view those records. The same applies to all resource support data. However, all resource typing definitions, as well as resource typing support data, are system-wide – that is, shared between all organizations in the system. User accounts and role definitions also exist at the system level. **Figure 1: The IRIS System Data Model** illustrates this organizational system.

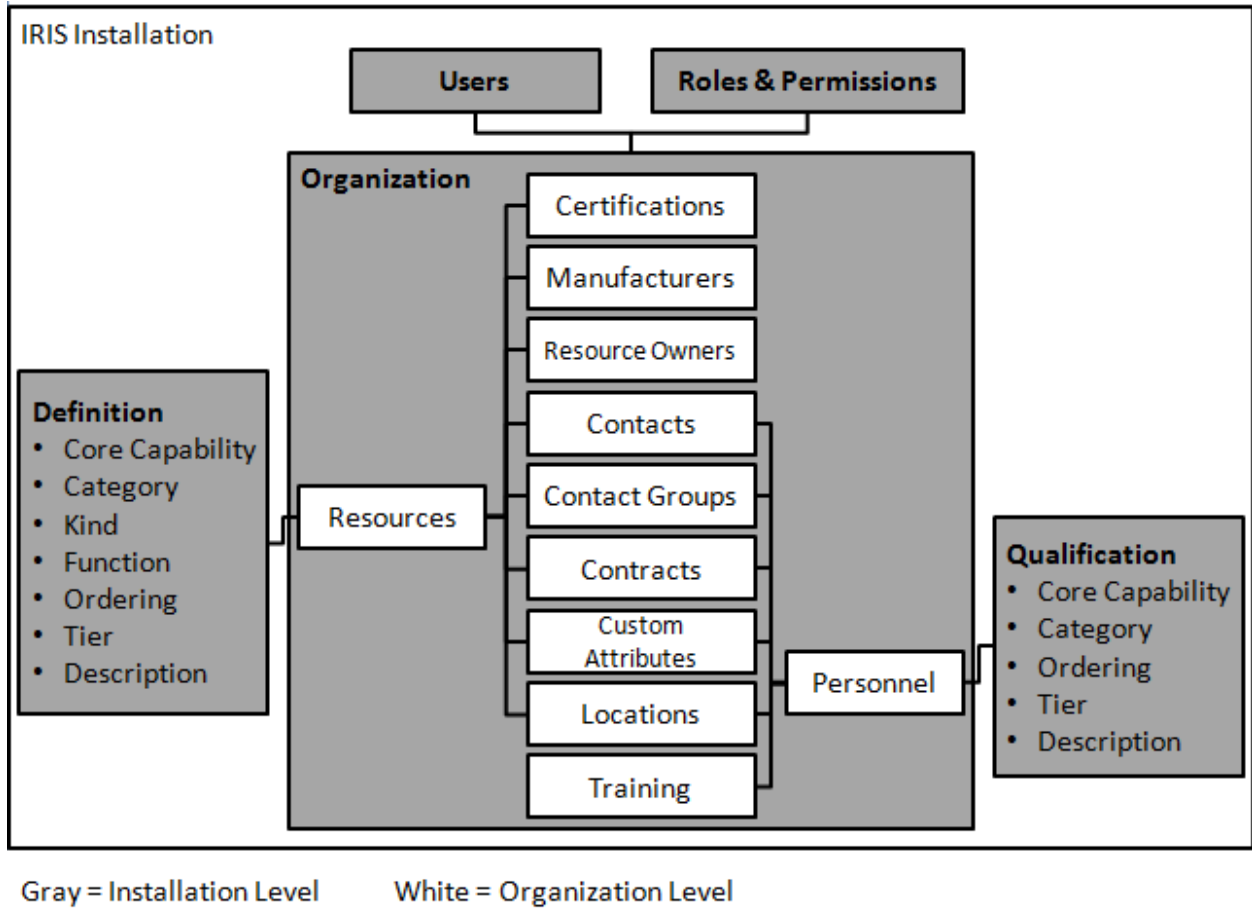


Figure 1: The IRIS System Data Model

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## Appendix C: Default User Role Permissions

This appendix lists the standard permissions of each default user role. This may be helpful in determining which user to assign which role, how to set up new roles, or in restoring the default roles to their original states if you edit them and later decide to revert their permissions.

IRIS is installed with eight default user roles – Organization Administrator, Personnel Entry, Personnel Manager, Personnel Viewer, Resource Entry, Resource Manager, Resource Viewer, and Typing Library Manager. The roles and permissions are listed below.

**Note:** If the All operation is selected, the role has permissions to List, Read, Create/Update, and Delete the target.

### C.1 Organization Administrator

Target	Operation
Person	All
Training	All
File	Create
Link	Create
Role	Read
Core Capability	Create
Core Capability	Read
Core Capability	Update
Definition Type	Create
Definition Type	Read
Definition Type	Update
Category	Create
Category	Read
Category	Update
Mission Area	Create
Mission Area	Read
Mission Area	Update
Capability	Create
Capability	Read
Capability	Update
Component	Create
Component	Read
Component	Update
Resource Typing Definition	Create
Resource Typing Definition	Read
Resource Typing Definition	Update
Kind	Create
Kind	Read
Kind	Update
Metric	Create

Target	Operation
Metric	Read
Metric	Update
Criteria Category	Create
Criteria Category	Read
Criteria Category	Update
Position Qualification	Create
Position Qualification	Read
Position Qualification	Update
Instance	Read
Certification	All
Contact	All
Contact Group	All
Contract	All
Custom Attribute	All
Location	All
Manufacturer	All
Owner	All
Resource	All
User	All
WebEOC Configuration	Read

## C.2 Personnel Entry

Target	Operation
Person	Create
Person	Read
Person	Update
Training	Create
Training	Read
Training	Update
File	Create
Link	Create
Core Capability	Read
Definition Type	Read
Category	Read
Mission Area	Read
Capability	Read
Component	Read
Resource Typing Definition	Read
Kind	Read
Metric	Read
Criteria Category	Read
Position Qualification	Read
Contact	Create
Contact	Read
Contact	Update
Contact Group	Create



Target	Operation
Contact Group	Read
Contact Group	Update
Contract	Create
Contract	Read
Contract	Update
Custom Attribute	Read
Location	Create
Location	Read
Location	Update
WebEOC Configuration	Read

### C.3 Personnel Manager

Target	Operation
Person	All
Training	All
File	Create
Link	Create
Core Capability	Read
Definition Type	Read
Category	Read
Mission Area	Read
Capability	Read
Component	Read
Resource Typing Definition	Read
Kind	Read
Metric	Read
Criteria Category	Read
Position Qualification	Read
Contact	All
Contact Group	All
Contract	All
Custom Attribute	All
Location	All
WebEOC Configuration	Read

### C.4 Personnel Viewer

Target	Operation
Person	Read
Training	Read
Core Capability	Read
Definition Type	Read
Category	Read
Mission Area	Read
Capability	Read
Component	Read

Target	Operation
Resource Typing Definition	Read
Kind	Read
Metric	Read
Criteria Category	Read
Position Qualification	Read
Contact	Read
Contact Group	Read
Contract	Read
Custom Attribute	Read
Location	Read
WebEOC Configuration	Read

## C.5 Resource Entry

Target	Operation
File	Create
Link	Create
Core Capability	Read
Definition Type	Read
Category	Read
Mission Area	Read
Capability	Read
Component	Read
Resource Typing Definition	Read
Kind	Read
Metric	Read
Criteria Category	Read
Position Qualification	Read
Certification	Create
Certification	Read
Certification	Update
Contact	Create
Contact	Read
Contact	Update
Contact Group	Create
Contact Group	Read
Contact Group	Update
Contract	Create
Contract	Read
Contract	Update
Custom Attribute	Read
Location	Create
Location	Read
Location	Update
Manufacturer	Create

Target	Operation
Manufacturer	Read
Manufacturer	Update
Owner	Create
Owner	Read
Owner	Update
Resource	Create
Resource	Read
Resource	Update
WebEOC Configuration	Read

## C.6 Resource Manager

Target	Operation
File	Create
Link	Create
Core Capability	Read
Definition Type	Read
Category	Read
Mission Area	Read
Capability	Read
Component	Read
Resource Typing Definition	Read
Kind	Read
Metric	Read
Criteria Category	Read
Position Qualification	Read
Certification	All
Contact	All
Contact Group	All
Contract	All
Custom Attribute	All
Location	All
Manufacturer	All
Owner	All
Resource	All
WebEOC Configuration	Read

## C.7 Resource Viewer

Target	Operation
Core Capability	Read
Definition Type	Read
Category	Read
Mission Area	Read
Capability	Read
Component	Read
Resource Typing Definition	Read

Target	Operation
Kind	Read
Metric	Read
Criteria Category	Read
Position Qualification	Read
Certification	Read
Contact	Read
Contact Group	Read
Contract	Read
Location	Read
Manufacturer	Read
Owner	Read
Resource	Read

## C.8 Typing Library Manager

Target	Operation
Core Capability	All
Definition Type	All
Category	All
Mission Area	All
Capability	All
Component	All
Resource Typing Definition	All
Kind	All
Metric	All
Criteria Category	All
Position Qualification	All
Definition Service Configuration	All

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## **Appendix D: IRIS Web Service Documentation**

Coming soon...

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## Appendix E: References

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## Appendix F: List of Acronyms and Abbreviations

API	Application Programming Interface
CSV	Comma-Separated Value
FCC	Federal Communications Commission
FEMA	Federal Emergency Management Agency
GB	Gigabyte
GIS	Geographic Information System
Goal	National Preparedness Goal
GZD	Grid Zone Designation
ID	Identification
IIS	Internet Information Services
IRIS	Incident Resource Inventory System
IS	Independent Study
KML	Keyhole Markup Language
MS	Microsoft
N/A	Not Applicable
NIMS	National Incident Management System
NPD	National Preparedness Directorate
PDF	Portable Document Format
POC	Point of Contact
PrepToolkit	Preparedness Toolkit
RTLTL	Resource Typing Library Tool
SAR	Search and Rescue
SP	Service Pack
SQL	Structured Query Language

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TCP/IP	Transmission Control Protocol/Internet Protocol
URL	Uniform Resource Locator
U.S.	United States
USNG	U.S. National Grid
VIN	Vehicle Identification Number
XML	Extensible Markup Language