IQCS User Guide

MODULE 2: NAVIGATING THE IQCS

OVERVIEW

Welcome to the Navigating the IQCS module. In this module, we examine the basics of accessing, using, and navigating through the Incident Qualifications and Certification System (IQCS). This includes the process you should go through when logging in to IQCS for the first time, managing your password, and setting up favorite pages.

The 2015 Upgrade to IQCS has not only brought new hardware that will provide faster 64-bit processing, operating system and a more stable environment.

The PeopleSoft program has also been upgraded which allowed some new features to be turned on, e.g. Pagelets. An explanation of the new feature can be found on page 13.

IQCS now allows the user to customize the menu with a top menu bar and breadcrumbs to the 'Classic' 2004 menu structure.

From your Home page, you can customize it with available applications and pagelets. Some of the applications are available to all roles while some of the pagelets are available to only designated roles. (TIP: Try the Reports pagelet. When a report has finished posting, it will display in this pagelet, thus eliminating having to stay in the Report Manager or Process Monitor pushing the Refresh button.)

IQCS users are not allowed to enter, edit or remove their own data on any pages, with the exception of experience records, in the IQCS application.

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THE IQCS APPLICATION

IQCS is based on HRMS 9, a commercial, off-the-shelf software package from PeopleSoft.

IQCS is an internet application that does not require you to install any client software on your individual computer. You can access IQCS through most of the popular web browsers. You can use any of the following browsers to access IQCS:

- o   Internet Explorer
- o   Mozilla Firefox
- o   Google Chrome
- o   Apple Safari

The online flexibility of IQCS enables you to choose from a variety of methods to access information within the system. You have the ability to modify how some pages display columns and data.

It also allows you to choose when you access the application.   The qualification system is available to anyone with a valid username and password 24 hours a day.

INSTRUCTIONS - LOGGING IN TO IQCS

1. Navigate to the IQCS website at http://iqcs.nwcg.gov/
2. Select the **IQCS Login** link on the top menu bar to login to the application.
   - Take a moment to read the warning banner. By selecting **I Agree**, you consent to the terms of system monitoring. There are no expectations of privacy for the usage of the data entered.
3. Select **I Agree** on the warning banner. If you select **I Disagree**, you are returned to the home page.
4. Enter your User ID and password.
5. Select the Sign In button.

Note: If you are a new user, you will receive an initial password from the IQCS Application Steward. Remember this is after all training must be completed with the certificate on file with IQCS, agency authorization received and user request form submitted.

Your initial password will expire with your first successful logon. Select the hyperlink titled 'Click here to change your password' to update it.
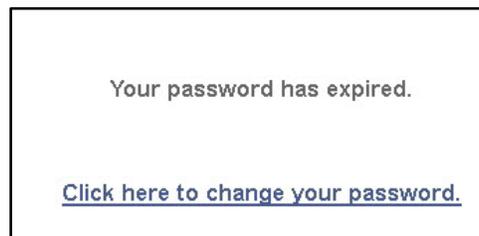
PASSWORD REQUIREMENTS

After logging in to IQCS for the first time, you will be required to create a new password. Your IQCS password needs to be secure enough to ensure that only you will be able to access the system with your credentials. To help support this, your password must:

- Contain a minimum of 12 characters.
- Contain at least 1 special character.
- Contain at least 1 number.
- Be changed every 60 days.
- Not match your User ID.

With all this in mind, your password needs to be difficult to guess, but something that you can remember. Avoid dictionary words, family and pet names.

After three failed attempts to log in your account is locked. This will require that you submit a help ticket to have your account unlocked or use the Password Recovery feature.

If you ever suspect that your password has been compromised, you should change it immediately.


PASSWORD SHARING

Logging into IQCS indicates the user's consent to the Terms of Service for applications hosted by the Bureau of Land Management –Fire and Aviation Directorate. The Terms of Service identifies the conditions of use, privileged access, and commitment to uphold security requirements within IQCS. This includes commitment to adequately protect and not share individual user IDs and passwords.

Violation of these Terms of Service may result in the loss or limitation of access to IQCS. Each agency/bureau lead will handle each infraction on a case-by-case basis.

The USFS has identified a mitigation process to regain access. Please review the FSFAQG, Chapter 2; Record Keeping.

PASSWORD RECOVERY

Once you have set up a permanent password for IQCS, you should set up your password recovery question.
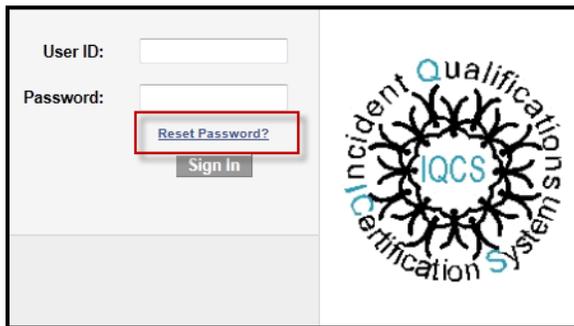
IQCS has a feature that will send you a temporary password in the event that you forget your password or get locked out of IQCS. You can answer a security question to have your temporary password e-mailed to you.

To setup this feature you must be successfully logged and at the Main Menu, so it is suggested you set the recovery question up after changing your password on your first login.

Use the procedure on the next page when you set up your password recovery question.

INSTRUCTIONS - SETTING UP PASSWORD RECOVERY QUESTION

1. Select the **My System Profile** link from the Main Menu dropdown at the top of the IQCS home screen.

2. Select the **Change or set up forgotten password help** link from the top of the Password section.
3. Choose a security question from the dropdown menu.
4. Add your response to the question and select **OK**.
5. Confirm that the correct email address is recorded at the bottom of the page. You should use your agency email address rather than a personal address and ensure that IQCS emails do not get caught in any spam filter.
6. Select the **Save** button once you have returned to the General Profile information page.

IQCS HOME PAGE

After you log in, the IQCS home page opens. PeopleSoft 9 provides the option of having the Menu along the top of the page as drop down menus or the classic Menu on the left-hand side of the screen.

NEW MENU STRUCTURE

The Menu is now along the top of the screen giving you more 'desktop' space on which to work. The Menu is a drop-down menu structure that when a folder is selected a submenu will cascade to the right. The submenu may contain additional folders and single sheets.
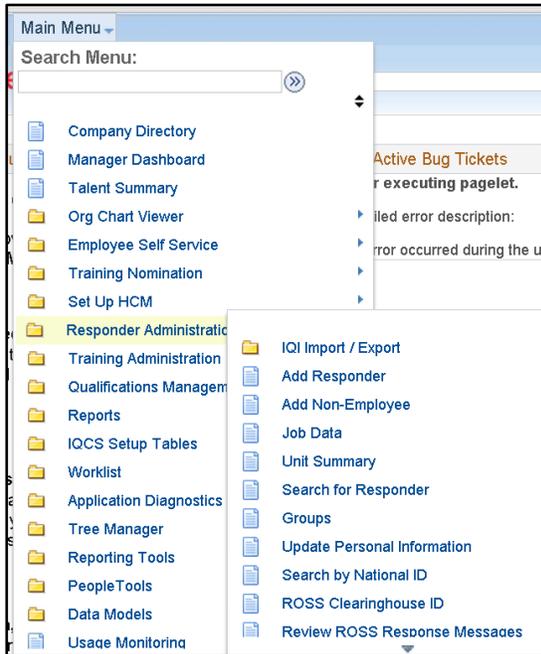
The folders signify that another submenu will cascade to the right of the higher level menu. The single sheet icon represents a single page to open.

You can then expand the menu item to reveal the component you want.

The Main Menu Search box can be used to search the application. Type a keyword into the search field and select the **>>** button to the right of the search field.

Select a folder, e.g. *Responder Administration*, to view the pages within that component.

MENU – CLASSIC STRUCTURE

The Menu – Classic can be selected so that it appears at the left of the desktop.   By personalizing the content of My Page, the classic IQCS Menu can be used.

It is a difference of how you like your menu displayed, either vertically or horizontally. You have the ability to choose which way is most logical and comfortable for you.

Instructions on how to personalize the content of your home page, including adding the classic menu, will follow in the Pagelets section.

Top Menu Features Description

Our menu has changed!

The menu is now located across the top of the page. Click on **Main Menu** to get started.

Highlights

Recently Used pages now appear under the Favorites menu, located at the top left.

Breadcrumbs visually display your navigation path and give you access to the contents of subfolders.

Menu Search, located under the Main Menu, now supports type ahead which makes finding pages much faster.

This box will display on your home page when you first come in to IQCS. It will guide you to the new features of the upgraded PeopleSoft IQCS.

It explains the Top Menu, Breadcrumbs and the Favorites feature.

Favorites will automatically compile your recently used pages. You may rename and re-order your favorites.

Breadcrumbs mark your path as you move within a page component. It allows you to 'back track' to the next higher page, e.g. *Responder Administration*, without having to go all the way back to the Main Menu if you want to switch to *Groups* on the *Responder Administration* component.

Favorites | Main Menu | Responder Administration | Job Data
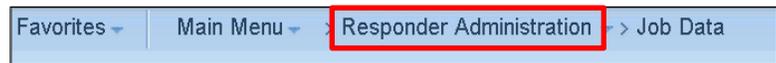
FAVORITE PAGES

IQCS allows you to designate frequently used pages as favorites. These pages will appear in the My Favorites area of the menu. These Favorite pages can be added in addition to your Recently Used pages.

If you ever need to provide the navigation path of one of your favorites to someone else, select the saved link. The new window will open with the breadcrumbs displayed at the top of the page.

INSTRUCTIONS - ADDING FAVORITES

The process for adding a page to your favorites is a simple one. Just follow the steps below to add a page to your favorites.

1. While on the page you wish to mark as a favorite, select **Add to Favorites** in the menu bar at the upper right-hand corner of the page.
2. When prompted, you can retain the default name or add a description of our own.
3. Select **OK** to add to the favorites list. Otherwise, select **Cancel** to return to previous screen.

INSTRUCTIONS - EDITING FAVORITES

If you need to edit an existing favorite, select **My Favorites** from the menu. From here, you can select **Edit Favorites** in order to change the link's display name, set or change the display order, or delete the favorite altogether. Select **Save** once the changes have been made.

PAGELETS

Pagelets are small pages that provide display-only snapshots of useful and relevant content to a user. Like other menus and locations in the IQCS system, access to a pagelet is controlled by permissions and roles and will return data specific to a user's roles. A pagelet that is viewable by one user may not be viewable to another user due to differences in roles. Home page content and layout can easily be personalized by each user to display the information that they want or need.

The content and/or content structure displayed by a pagelet is set; however, the user can select what pagelets are displayed if they have the corresponding role and the location that the pagelet holds on their IQCS home page. Once added to a home page, pagelets can be refreshed, minimized, expanded or removed by simply selecting the buttons on the top right of each pagelet.

PERSONALIZE CONTENT

In the upper right-hand corner, you will find two links, **Personalize Content** and **Layout**. Click on **Content** to open **Personalize Content: My Page**.

On **My Page**, applications and pagelets, if available, can be selected. When completed, select **Save** to personalize your Home page.

Top Menu Features Description provides brief explanation of the new features in this upgrade of PeopleSoft

My Reports provides a link to the Report Manager

Report List displays your completed reports. Select the report name to open in a new window.

Pagelets are small pages that provide display-only snapshots of useful and relevant content to a user. Like other menus and locations in the IQCS system, access to a pagelet is controlled by roles and will return data specific to a user's permission list. A pagelet that is viewable by one user may not be viewable to another user due to differences in roles.

If the box to display is grayed out on the Personalize Content: My Page, the pagelet is required by a role on your account profile.

INSTRUCTIONS - PERSONALIZE CONTENT
1. Select the **Personalize Content** hyperlink.
2. Select or unselect the items you want to appear or not appear on the page.
    - Pagelets displayed on this page correspond to role access.
    - If a pagelet is identified as required, the check box will be grayed out.
3. Select the **Save** button
4. Select the **Personalized Layout** hyperlink to arrange the pagelet(s) in the columns or select the **Return to Home** hyperlink to return to you IQCS homepage.

PERSONALIZE LAYOUT

The default position is in left column. Select the Layout link in the upper right-hand corner of your homepage to modify or Personalize Layout on the **Personalize Content: My Page**
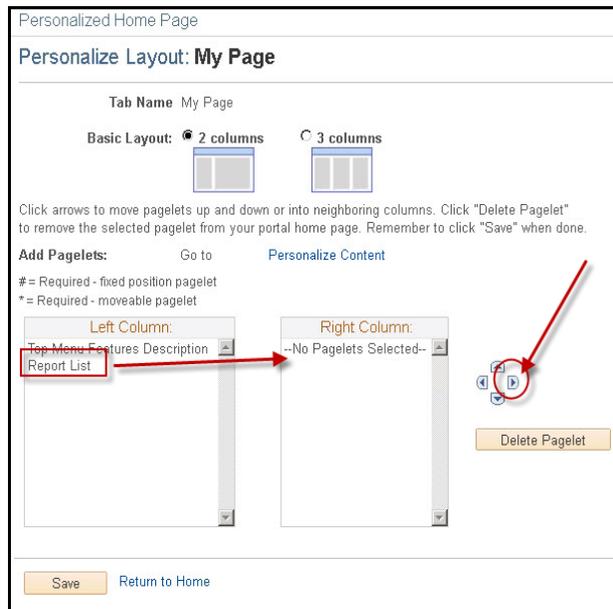
The page can be changed from 2 to 3 columns.

Use the arrows to the right of the columns to move the pagelets and applications to your liking.

Select **Save** to personalize the layout your Home page.

INSTRUCTIONS - PERSONALIZE LAYOUT
1. Select the **Personalize Layout** hyperlink
2. Select the pagelet and then use the arrows to more it up down or over into a neighboring column.
3. Select the **Save** button
4. Select the **Personalized Content** hyperlink to add/remove the pagelet on the homepage or select the **Return to Home** hyperlink to return to you IQCS homepage.

NAVIGATING IQCS

Since IQCS is an Internet application, it functions similarly to many web pages you use regularly. You can tell if you are able to select a link because the cursor will switch from an arrow to a small hand. Some features are unique to PeopleSoft

OPENING A NEW WINDOW

You can open multiple new windows from within IQCS. This is useful when you need to access information on one page while still referring back to the information on the original page.

No matter what IQCS screen you are on, you can always select the **New Window** link in the upper right corner to open a new window. This window will either open in a new browser window or in a new tab within your current browser, depending on your browser settings.

Once the new window opens, you can navigate to the additional desired menu item.

NOTE: Each new window will start its own 20-minute timer before the page expires.

BASIC AND ADVANCE SEARCH

To find existing values of data, you must use a search. A search page displays when you select a component or a prompt. Typically, you will use various field values to narrow your search. There are typically two search options to choose from: Basic and Advance.

- **EmplID** is always the strongest, fastest search
- Last Name is second strongest search – but may not be unique and return many options
- First Name in combination with the Last Name field is strong – may not be unique
- Name: format is **lastname,firstname**

The more fields or characters you enter, the more specific your search results become. This will reduce the number of rows of data returned from which you will make a selection. You can scroll through the search list to find the specific value. Select the row of data that you want to view to access that data.

Regardless of the search type, the list box displays the first 300 records in the table that match the value(s) you specified in the search area. If the search results display 1-100 of 300, there **are** more than 300 records. This is a good indicator you should refine your search criteria.

BASIC SEARCH

The basic search is used to search within one data column with a set search parameter. The Search By drop down is defined by the data table and the user can only select one at a time in the basic search.

If your search does not return the expected results, refine your search or try different options such as changing begins with to contains, use the wildcard (%) within a search string, etc.

ADVANCED SEARCH

The advance search allows the user to search across multiple data columns using different search parameters and criteria. The search criteria fields are defined by the data table.

You can refine your search using the dropdown icon Parameters on each Search Key. The search parameters are: **begins with**, **contains**, **=**, **not=**, **<**, **<=**, **>**, **>=**, **between**, and **in**.

Use as many of the Search Keys as you wish to refine your search. When a search screen includes an EmplID field (system- generated Employee ID number), at least one Key must contain information in order for the system to query the database.

If your search does not return the expected results, refine your search or try different options such as changing begins with to contains, use the wildcard (%) within a search string, etc.

Search criteria can be defined and saved for future use in the Advance Search option. Criteria must be defined prior to selecting the **Save Search Criteria** hyperlink.

ACCESSING INFORMATION

There are multiple ways in which you can access information within IQCS. You may not be able to use all of these options based on the security and permissions you've been granted. Additionally, not all pages will allow you to correct history.

The **Add** action adds a new row of information to the database with a new high level, primary key. This is like adding a new file folder to a filing cabinet.

Update/Display is the default when you enter a page. You can view and update information here. When you insert a new row in this mode, it is like adding a piece of paper to a file folder.

This action works the same as **Update/Display**, but allows the user to review not only current and future rows of information, but also historical rows of data.

Correct History is the most inclusive of action types. This action is not available on all pages. The goal is to preserve true historical data. Use this this action judiciously. If, however, a correction is needed and the Correct History button is not available, contact your IQCS Agency Representative or the IQCS Help Desk.

USE OF EFFECTIVE DATES

When you update information in IQCS, you run the risk of overwriting, or eliminating, historical data. IQCS has a system in place to help prevent this.

To retain this history, you should select the **+** button to add a new Effective Date row. You can then set the effective date of the change being made. Generally speaking, you can just accept the default date of today's date, but there are some instances when you will want to use some future date as the effective date. IQCS recognizes three types of Effective Date rows:

- **Current Rows:** The data row with the most recent effective date that predates or is equal to the system date (typically today's date). There can only be one current row.
- **History Rows:** The data rows with effective dates that precede the current row. There can be multiple history rows.
- **Future Rows:** The data rows with effective dates that are in the future. There can be multiple future rows.

Effective sequences are only used when more than one action is taken on an Effective Date row during the same day.

ADD OR DELETE ROWS TO A RECORD

Within various pages throughout the system, you have the ability to add rows of data to include all applicable values and details. To include this information on a page, you are provided with **Insert** [**+**] and **Delete** [**-**] buttons. These buttons are associated with what is referred to as scroll areas.

The header of the scroll area may display a navigation bar with links/icons for viewing a previous, next, top, or bottom row. Scroll areas enable scrolling through multiple rows of data by selecting the forward and back arrows next to the word **First** and **Last**. You can view all rows at one time by selecting **View All**.

- *Not all pages allow a user to correct history.*
- *Not all users will have the ability to correct history.*

INSTRUCTIONS - DOWNLOAD DATA TO AN EXCEL SPREADSHEET

This function will download data from the screen to an Excel spreadsheet. At any page that the link is loaded the data can be downloaded into an Excel spreadsheet. A limitation of this process may be your computer settings.

1. Select the grid to download any list into an Excel spreadsheet.

Operation	Position	ROSS Response Message Text	PubID	Details	Resend
				Details	Resend

Personalize | Find | 🔲 | 📊   First ◀ 1 of 1 ▶ Last

2. Depending on your browser, the File Download window may appear. Select Open.
3. The following Microsoft Excel window may appear. Select Yes.

Microsoft Excel

⚠ The file you are trying to open, 'ps.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

[Yes]   [No]   [Help]

4. An Excel window will open with data.

HOT KEYS AND ACCESS KEYS

You can use your keyboard to access and navigate through IQCS. You do this by using hot keys and access keys.

Hot keys perform an immediate action. For example, when focus is in a field that has lookup processing, Alt+5 invokes the Lookup page without having to press the Enter key.

Access keys are key combinations using the Alt key that move focus to a specific field on the current page. For example, Alt+\ toggles between **Add a New Value** and **Find an Existing Value** on the Search page. Once a selection is made, you can press the Enter key to invoke that action or use the Tab key to move to the next Toolbar button.

A complete list of IQCS hot keys and access keys is available by selecting the Reference button at the bottom of this screen.

LIST OF ACCESS KEYS AND HOT KEYS

ALT + 1   Executes different buttons depending on the page type:

- Save button on the toolbar in a page
- OK button on a secondary page
- Search or Add button on a Search or Lookup page

ALT + 2   Return to Search
ALT + 3   Next in List
ALT + 4   Previous in List
ALT + 5   Valid Lookup Values
ALT + 6   Related Links
ALT + 7   Insert Row in grid or scroll area
ALT + 8   Delete Row in grid or scroll area
ALT + 0   Refresh the page by invoking the Refresh button on the toolbar
ALT + .   Next set of rows in grid or scroll area [ALT period]
ALT + ,   Previous set of rows in grid or scroll area [ALT comma]
ALT + /   Find in grid or scroll area [ALT forward slash]
ALT + '   View All in grid or scroll area [ALT prime]
ALT + \   Executes different buttons depending on the page type:

- Moves focus to first button on the toolbar [ALT backslash]
- Toggle between Add and Update on the Search page [ALT backslash]

CTRL + J   System Information
CTRL + K   Keyboard Information
CTRL + Y   Toggle menu between collapsed and expanded
ENTER   Invoke the following buttons where present: OK, Search, Lookup
ESC   Cancel