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 The IQCS for the first time, managing your password, and setting up favorite pages.

From your Home page, you can customize the available applications and pagelets. Some of the applications are available to all roles while some of the pagelets are available to only designated roles.

The Reports pagelet has been added for all roles. 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.

NEW June 2022

- Update screenshot for effective date

TABLE OF CONTENTS

THE IQCS APPLICATION

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

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

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

The online flexibility of the 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.
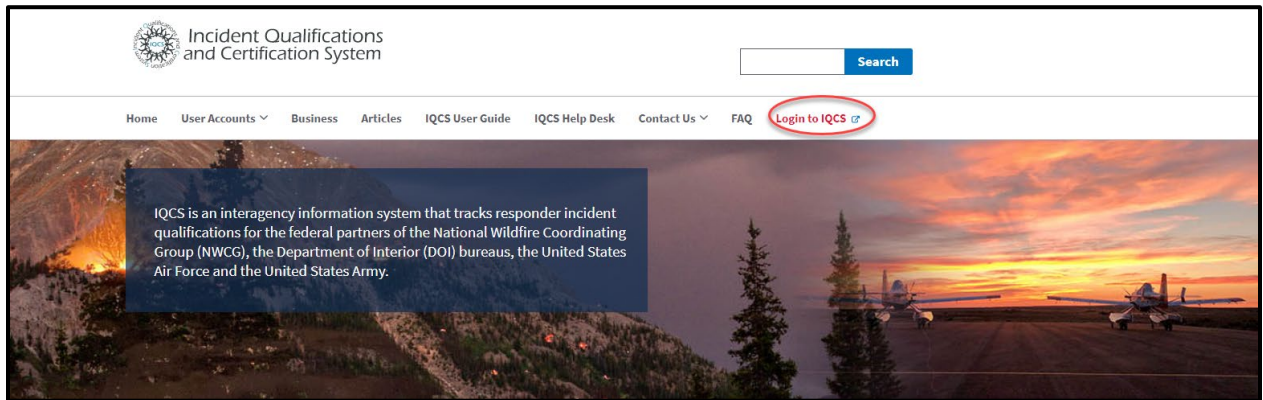
INSTRUCTIONS - LOGGING IN TO THE IQCS

1. Navigate to the IQCS website: IQCS Web.
2. Select the **IQCS Login** link on the top menu bar to login to the application.
3. Take a moment to read the warning banner. By selecting **I Agree**, you consent to the terms of system monitoring. 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 ticket system. This is sent after all training is completed, certificate(s) on file, the IQCS, agency authorization received, and user request form submitted.

Your initial password will expire with your first successful logon. Select the hyperlink to change your password.

Your password has expired.

Click here to change your password.
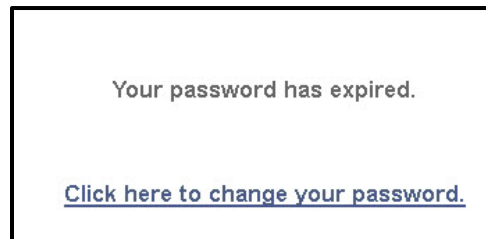
PASSWORD REQUIREMENTS

After logging in to the 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.
    - The required 1special character must be one of the following: # $ % & = ?
    - You may have more than on special character, but at least one of them must be from the above list.
- Contain at least 1 number.
- Be changed every 60 days.
- Not match your User ID.

Your password needs to be difficult to guess, but something that you can remember. Avoid dictionary words and family or pet names.

After three failed attempts to login your account is locked. Use the Forgot your Password link to have a new password sent to the email address on file in the IQCS. Do not copy and paste the new password.

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

PASSWORD SHARING

Logging into the IQCS indicates 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 the IQCS. This includes commitment to adequately protect and not share individual user IDs and passwords.
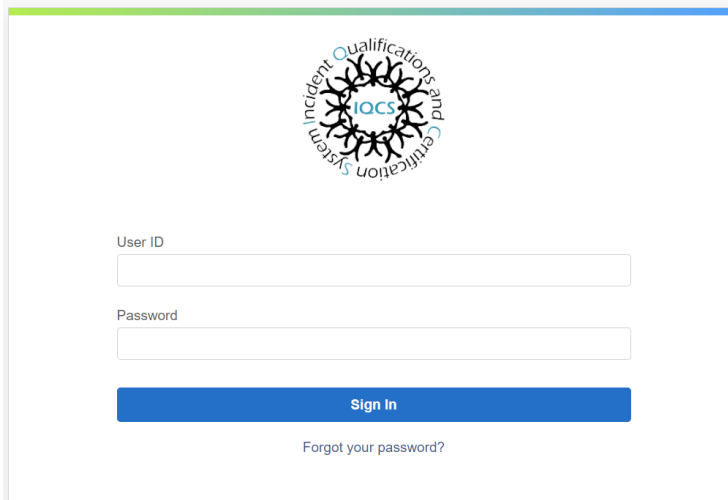
The Terms of Service and the Privacy Policy are links on the login page.

Violation of these Terms of Service may result in the loss or limitation of access to the 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 the IQCS, you should set up your password recovery question.
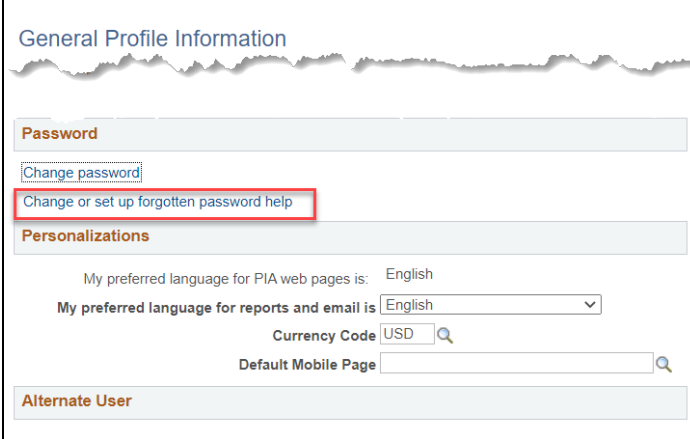

the IQCS has a feature that will send you a temporary password if you forget your password or have locked out your account. You can answer a security question to have your temporary password e-mailed to you.

To use this feature, you must have logged in and setup your password hint.

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 Password section.
3. Choose a security question from the dropdown menu.
4. Add your response to the question and select **OK**.
5. Select the **Save** button.

IQCS HOME PAGE

After you log in, the IQCS home page opens.

MENU STRUCTURE

- Add To allows you to add to favorites and the NavBar.
- NavBar allows you to navigate to favorites that you have set using the Add To drop down.
  - The NavBar gear icon will allow you to remove items you have saved.

The Menu is a drop-down menu structure. When a folder is selected a submenu will cascade to the

right. The submenu may contain additional folders and single sheets.
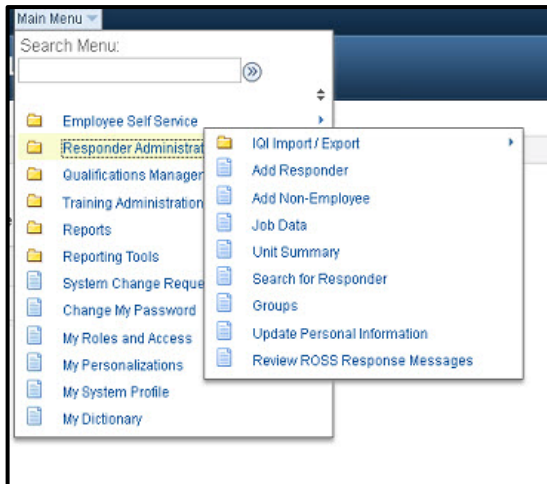
The folders signify that another submenu will cascade to the right of the higher-level menu. The single sheet icon represents a single page to open.

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 hit enter or select the **>>** button to the right of the search field.

FAVORITE PAGES

The IQCS allows you to designate frequently used pages as favorites. These pages will appear in the Favorites area of the menu. 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

While on the page you wish to mark as a favorite, select **Add To** in the menu bar, upper right-hand corner of the page then select Favorites.

1. When prompted, you can retain the default name or add your own description.
2. Select **OK** to add to the favorites list. Select **Cancel** to return to previous screen.

INSTRUCTIONS - EDITING FAVORITES

If you need to edit an existing favorite, select **Edit Favorites** from the Favorites menu, upper left side of the screen. 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.

INSTRUCTIONS – ADDING OR REMOVING FAVORITES ON THE NAVBAR

1. While on the page you wish to add to the NavBar, select the **Add To drop down and choose NavBar**
2. On the NavBar, choose the gear icon and then the red x for those that you want to remove

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.

LINKS & ANNOUNCEMENTS

Links & Announcements is turned on for all users and cannot be moved or turned off. The IQCS team will use that area to display useful links and major announcements. The IQCS Website is the primary source for news updates.

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, **Content** and **Layout**.

Click the Content link to personalize content on the **My Page. A**pplications and pagelets, if available, can be selected.

Menu sets the menu to show vertically down the left side of the screen. No selection will default to menus across the top of the page.

My Reports provides a link to the Report Manager.

Report List displays your completed reports. This has been turned on for all users and cannot be unselected.

My Active Course Sessions is turned on for all users with active sessions where they are the course coordinator.
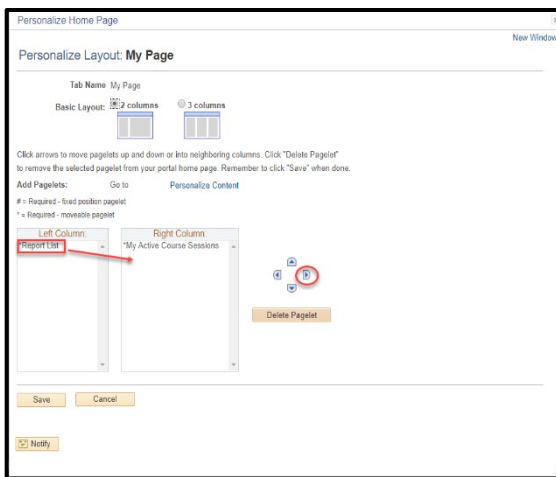
INSTRUCTIONS - PERSONALIZE CONTENT
1. Select the **Content** hyperlink.
2. Select or unselect the items you want to appear or not appear on the page.
   - Pagelets displayed on this page correspond to role access.
   - If a pagelet is identified as required, the check box will be grayed out.
3. Select the **Personalize Layout** hyperlink to arrange the pagelet(s).
4. Select the **Save** button, changes to both content and layout will be saved.

PERSONALIZE LAYOUT

The default position is the left column. Select the Layout link in the upper right-hand corner of your homepage to personalize the layout on the **Personalize Content: My Page**

The page can be changed from 2 to 3 columns.

The arrows to the right of the columns move the pagelets and applications from on column to another or change the order.

INSTRUCTIONS - PERSONALIZE LAYOUT
1. Select the **Layout** hyperlink.
2. Select the pagelet and then use the arrows to more it up down or over to a neighboring column.
3. Select the **Personalized Content** hyperlink to add/remove the pagelet.
4. Select the **Save** button, changes to both content and layout will be saved.

NAVIGATING THE IQCS

The IQCS is an Internet application, it functions similar 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 the IQCS. This is useful when you need to access information on one page while still referring to the information on the original page.

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 launched or each instance of the IQCS running in another browser will share the 20-minute timer on page expiration. Once one window times out, all windows timeout.

BASIC AND ADVANCED 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 the most accurate and fastest search.
- Last Name - may not be unique and can return many results.
- First Name in combination with the Last Name field – 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.

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 arrow on each search field. The search parameters are: **begins with**, **contains**, **=**, **not=**, **<**, **<=**, **>**, **>=**, **between**, and **in**.

Use as many of the search fields as you wish to refine your search.

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.

WILDCARD SEARCH

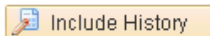Wildcard search only works with the begin with and contains operators

Wildcard characters

- % match one or more characters
  - S%ANFO in last name will return all last names that begin with S and contain "anfo" in the last name. For example, Stanford, Sanford, Stanforth.

ACCESSING INFORMATION

There are multiple ways in which you can access information within the IQCS. You may not be able to use all options due to the security and roles you have been granted. Additionally, not all pages will allow you to correct history.

| Include History | This action works allows the user to review not only current and future rows of information, but also historical rows of data. |

| Correct History | **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, 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 the IQCS, you run the risk of overwriting, or eliminating, historical data. the IQCS has a system in place to help prevent this.

To retain history, select the **+** button to add a new Effective Date row. You can then set the effective date of the change being made. 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. the 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 can 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.
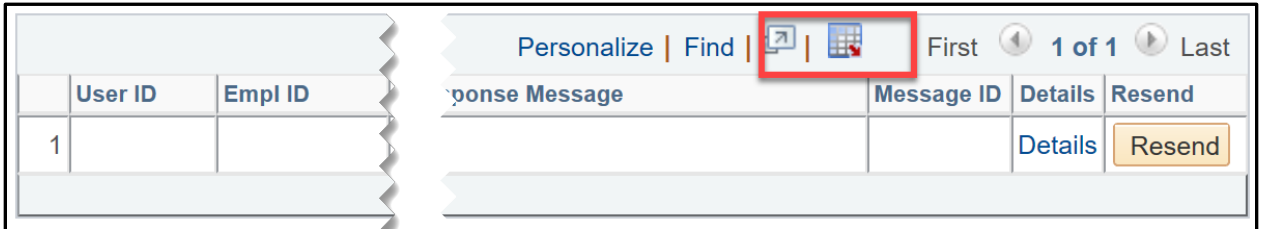
The header of the scroll area may display a navigation bar with links/icons for viewing a previous, next, top, or bottom row. Scroll areas enable scrolling through multiple rows of data by selecting the forward and back arrows next to the word **First** and **Last**. You can view all rows at one time by selecting **View All**.

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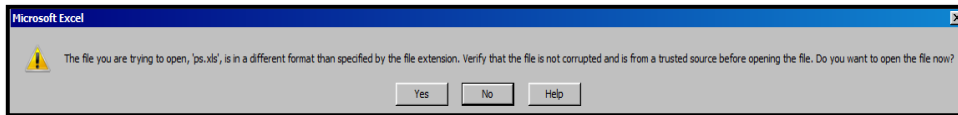- *Not all users will have the ability to correct history.*

INSTRUCTIONS - DOWNLOAD DATA TO AN EXCEL SPREADSHEET

This function will download data from the screen to an Excel spreadsheet. Any page with the icon shown can have the data downloaded into an Excel spreadsheet. A limitation of this process may be your computer settings.

1. Select the download icon to download the content of the grid into an Excel spreadsheet.

	User ID	Empl ID	ponse Message	Message ID	Details	Resend
			Personalize | Find | ☑ | 🔲 First ◀ **1 of 1** ▶ Last			
1					Details	Resend

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. Excel will open with the data.