

IROC REPORTS

The basics

WELCOME

INTRODUCTION & COURSE OVERVIEW

COURSE OVERVIEW

- Purpose
 - This session is intended to demonstrate the following:
 - Using pre-defined global reports
 - Printing reports
 - Scheduling reports



Self Help



Accessing IROC reports



IROC reports user basics



Saving a copy of an existing global report



Modifying a saved report



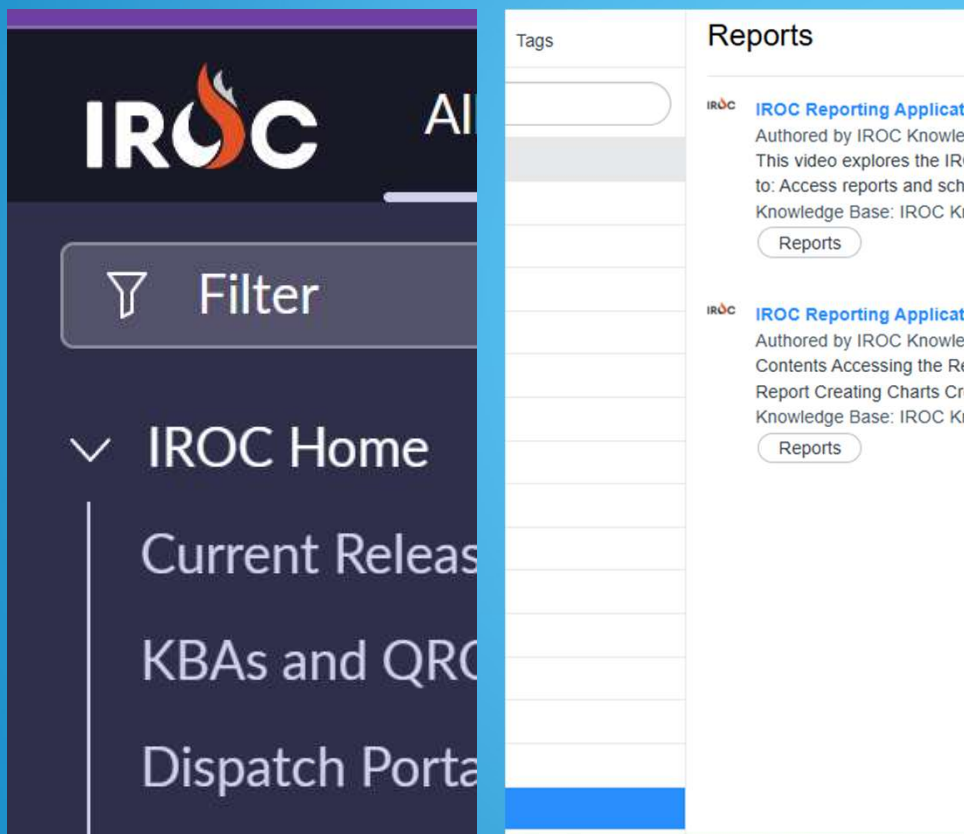
Exporting and printing reports



Scheduling reports

COURSE OBJECTIVES

SELF HELP



- From IROC application
 - DMT – KBAs and QRCs
 - https://iroc.nwcg.gov/kb_view.do?sysparm_article=KB0010234

SELF HELP

<https://www.wildfire.gov/page/iroc-kba-knowledge-based-articles>

IROC Quick Reference Cards and Training Videos

CDAT 2024 References

Name
IROC Basics Reports for CDAT v 1.7
IROC Advanced Reports for CDAT v1

Reports

Name
Accessing ROSS Legacy Reports
Ad Hoc Incident Resource Reporting^{cf}
IROC Reporting Application^{cf}
IROC Basic Reports Tip Sheet
IROC-ROSS Legacy DCAT Reports Tip Sheet
Viewing and Creating Dashboards^{cf}

IROC REPORTS

Reports Overview

- Accessing IROC reports via the Data Management Tool (DMT)
 - IROC DMT
 - Type IROC Reporting in Filter Navigator



IROC Reporting Application

IROC Reporting Modules

REPORTS OVERVIEW

- IROC reporting modules
 - My Center Reports
 - Reports which have been shared to all users in the center
 - The center you are currently logged in to
 - Slightly different run options
 - My Scheduled Reports
 - Reports for which you have created a schedule
 - IROC Reports
 - Accessing Existing Reports
 - My Reports
 - Group
 - Global
 - All

REPORTS OVERVIEW

- IROC reporting modules
 - IROC Report Data Sources
 - Data sources in use
 - Reports those data sources have been used for
 - Reporting Lists
 - QST₁
 - RST₁
 - RST₂

Reports Overview

The screenshot shows the IROC Reports Overview interface. At the top, there is a navigation bar with the IROC logo, links for 'All', 'Favorites', 'History', and 'IROC Help', and a breadcrumb 'IROC - Report Users and Groups' with a star icon. Below the navigation bar, there is a search bar with a dropdown menu for 'Report ID' and a search input field. The main content area shows a breadcrumb 'All > Group ID is WY-CDC' and a table of reports. The table has three columns: 'Group ID', 'Report ID', and 'Created by'. Each column has a search input field. The table contains the following data:

Group ID	Report ID	Created by
WY-CDC	AD Resources Available OH Fire Org	hbromley
WY-CDC	All Filled Requests	hbromley
WY-CDC	All Filled Requests	tbraten
WY-CDC	All Filled Requests - EH	ehutton
WY-CDC	All Filled Requests - EH	aspaulding
WY-CDC	Available Crews By Provider	hbromley
WY-CDC	Available Equipment By Provider	hbromley
WY-CDC	BUYM Requests October 1-31, 2021	lmcauley

- My Center Reports

- Breadcrumbs at the top indicate current center
 - Contains reports distributed to that center
 - Report Name
 - Who created the report
 - Columns are customizable

Reports Overview

The screenshot displays the IROC Reports Overview interface. At the top, there is a navigation bar with the IROC logo, links for 'All', 'Favorites', 'History', and 'IROC Help', and a 'IROC- Scheduled Email' button. Below this is a filter bar with a search icon, a dropdown menu set to 'Updated', and a search input field. The main content area shows a breadcrumb 'All > Created by = scanady' and a table of reports. The table has columns for 'Name', 'Run', 'Time', and 'Subject', each with a search input field. The table contains three rows of data:

Name	Run	Time	Subject
Scheduled execution of OSC38	Daily	00:00:00	
Scheduled execution of IMT assignments for 2022	Monthly	07:00:00	IMT assignments for 2022
Scheduled execution of OES Region VI Assigned Resources	Daily	06:00:00	OES Region VI Assigned Resources

- My Scheduled Reports
 - Breadcrumbs at the top indicate user
 - Contains your distribution schedules
 - Report Name
 - Columns are customizable

Reports Overview



- IROC Reports
 - My reports
 - Displays all reports you have modified and saved.
 - Group
 - Displays reports shared by a group or user or by those with valid login credentials.
 - Global
 - Displays reports shared to a global group.
 - All
 - Displays all reports you have access to.

Reports Overview

- Global Reports
 - Report titles are categorized by an alphanumeric prefix. Click on a report title to view the report.
 - The first letter indicates the record type
 - (I – Incident, Q – Request, R – Resource).
 - The next two letters indicate the action
 - (RQ – Request, TX – Transaction, ST – Status).
 - The number indicates the dispatch focus
 - (100 – National, 200 – GACC, 300 – Dispatch Center).

Reports Overview

- IROC Reports









- Each report name is preceded by three icons

- Click the **Edit** icon to open and edit the report.

- Click the **Favorite** icon to label the report as a favorite.

To see only your favorite reports, click the star icon in the column header.

- The icon in the **Type** column indicates the type of report.








		<u>Type</u>	 <u>Title</u>
			<u>IRQ100 - Inci</u>
			<u>IRQ100 - Inci</u>

ANY QUESTIONS?

Demo 1

DEMO 1

- Find a report and set as a favorite
 - Click the star

			<u>IRQ205 - Compact Request List by Compact and Created Date</u>
			<u>IRQ300 - Incident Request List</u>
			<u>IRQ301 - Pending Requests by Incident for selected Catalog, Category, Catalog Item</u>

DEMO 1: SET FAVORITE

Purpose:

You want to set the IRQ300 report as a favorite

TASK 1. Open IROC Reports

1. Go to IROC DMT
2. Search IROC Reporting in Filter Navigator

TASK 2. Find desired report

1. Select Global reports
 1. Find IRQ300 – Incident Request List
 2. Click star to set as favorite

SAVING AND MODIFYING REPORTS

SAVING A COPY OF AN EXISTING REPORT

- Using an existing report is an easy way to create your own report without starting from scratch
- Find the report you want to modify and click either the edit icon or the report name to open
 - GROUP
 - GLOBAL
 - ALL

SAVING A COPY OF AN EXISTING REPORT

- Rename and save your report before modifying
 - Two options to rename
 - Insert and Stay to save to your 'My Reports'

The screenshot shows the 'Edit report' interface. The top navigation bar includes a back arrow, 'Edit report', and 'Switch to Classic UI'. Below the navigation bar, there are tabs for 'Data', 'Type', 'Configure', and 'Style'. The main content area is divided into two columns. The left column contains the 'Report name' field, which is currently set to 'IRQ300 - Incident Request List'. The right column contains the 'Report Title' field, which is also set to 'IRQ300 - Incident Request List'. A dropdown menu is open over the 'Report Title' field, showing two options: 'Insert' and 'Insert and Stay'. A yellow arrow points from the 'Report name' field to the 'Report Title' field, and a green arrow points from the 'Insert and Stay' option to the 'Report Title' field.


Demo 2

DEMO 2

- Select, Rename and Save a copy of the IRQ300 report (from Demo 1) to modify *later*



The screenshot shows a web interface for managing reports. At the top, there is a navigation bar with a hamburger menu icon, the word 'Reports', and a tabbed interface with three tabs: 'My reports' (which is selected and highlighted with a dark blue border), 'Group', and 'Global'. To the right of these tabs is an 'All' button. Below the navigation bar is a table with the following structure:

	☆	Type	↑ Title
	☆		<u>TRAINING - IRQ300 - Incident Request List</u>

DEMO 2: SELECT, RENAME AND SAVE REPORT

Purpose:

You want to save a copy of irq300 in order to filter for requests on a specific incident

TASK 1. Open IROC Reports

1. Go to IROC DMT
2. Search IROC Reporting in Filter Navigator

TASK 2. Save Desired Report

1. Select Global reports
 1. Find and open IRQ300 – Incident Request List
2. Rename report to Demo 2
3. Click Save/Insert icon
 1. Select Insert or Insert and Stay
4. Return to IROC reports list
 1. Confirm report has saved to My Reports

MODIFYING A REPORT

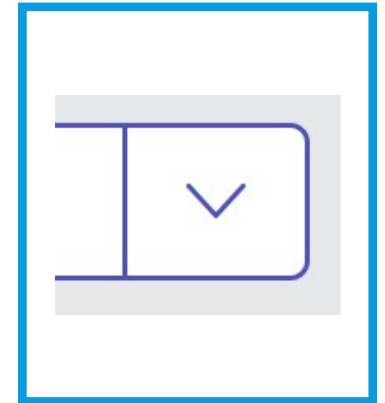
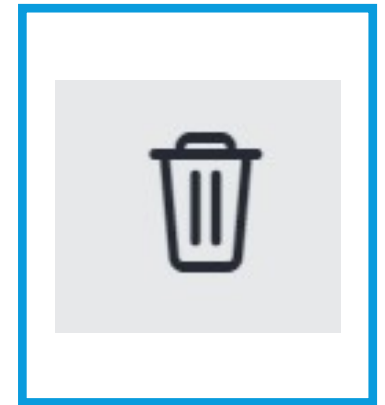
MODIFYING A REPORT



- Report options
 - Using New UI
 - Better functionality
 - *Click link to switch if you are currently in Classic UI*
 - Information
 - Option to add a description of the report
 - Sharing
 - Share to Groups/Users
 - Schedule
 - Add to Dashboard
 - Export to PDF

MODIFYING A REPORT

- Delete
 - Deletes the report
- Save/Insert
 - Save/Update
 - Insert
 - Insert and stay
- Run
 - Run without saving



MODIFYING A REPORT

- IROC Reports
 - Left click column header to sort by that item
 - Right click column header for additional options
 - Sorting
 - Bar and Pie charts
 - Configure
 - Export
 - Excel, CSV, etc.



Modifying a Report

- IROC Reports

- Columns

- Move left to remove from report

- Move right to add to report

- Selecting a green item with + allows drill down

- Clicking plus adds 'tree' to open more items

- Change order by selecting item and moving up or down



Columns

Available

- Catalog [+]
- Catalog Item [+]
- Mobilization ETD TZ [+]
- Mobilization ETA TZ [+]
- Demobilization ETD TZ [+]
- Demobilization ETA TZ [+]
- Active
- Active Direct Placement
- Actual Cost
- Agreement Comments
- Agreement Description
- Agreement Number
- Allow Place Direct After Place D
- Allow Place Direct After Place D
- Allow Place Direct After Place U
- Allow Place Down After Place D
- Allow Place Up After Place Dir

Selected

- Incident.Dispatching Organization
- Incident.Dispatching Organization
- Incident.Incident Number
- Incident.Incident Name
- Incident.Protecting Unit.Subdivi
- Incident.Protecting Unit.Subdivi
- Request Status
- Catalog
- Request Number
- Catalog Item
- Inclusions
- EFF/AD Exclusion
- Special Needs
- Resource Assignment.Catalog It
- Assignment Name
- Resource Assignment.Resource
- Resource Assignment.Home Dic

OK

MODIFYING A REPORT

- Using Advanced Filters
 - Apply advanced filters to adjust results
 - Using a combination of AND/OR statements
 - May also be Dynamic
 - Fit the context of the user running the report



MODIFYING A REPORT

- Using Advanced Filters
 - Click the Filter icon to modify and create filter conditions

Table: Request [x_fosf_iroc_request]



All > Incident is anything > Catalog is anything > Catalog Category
Request Status is anything > Created between 01-01-2020 00:00:00 and
Incident Dispatching Organization is Cody Interagency Dispatch Center

MODIFYING A REPORT

○ Using Advanced Filters

○ Start modifying the filter by adjusting **Conditions**.

- Choose a field to test
- Choose a condition statement (Operator)
 - Condition statement menu will change based on selected item
- Enter the matching data or condition (Search Field)

○ Example:

- "Incident - is - anything"; "Catalog Category - is - Aircraft Groups"; "Request Status - is - At Incident"

▼ CONDITIONS

All of these conditions must be met

AND	Incident	is anything	⊖	OR	AND
	Catalog Category	is	⊖	OR	AND
	Request Status	is	⊖	OR	AND

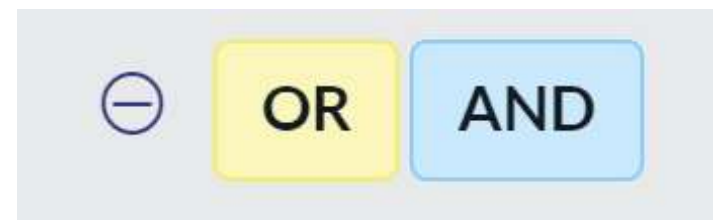
Choose Field

Operator

Search Field

MODIFYING A REPORT

- Using Advanced Filters
 - Click minus sign to the right of a condition to remove that line.
 - Click OR / AND to add additional filters



MODIFYING A REPORT



○ When do I use them??

○ AND

- Used when you want all filter criteria's to be met
- Example: You want to see all incidents in NWCC in July.
- Incident GACC = NWCC **AND**
Initial Date = Between July 1 through July 31

○ OR

- Used when you want one or more filter criteria's to be met
- Example: You want to see all incidents in SWCC or GBCC
- Incident GACC = SWCC **OR** Incident GACC = GBCC

MODIFYING A REPORT

- Using Advanced Filters

- For options with a next button, click to drill down to related fields.



▼ **CONDITIONS**

All of these conditions must be met

Incident. is anything

AND

Search: inci Incident → Incident Fields

Amount At Incident	FireCode Requested
Incident >	In IROC
Incident Jetports	Incident Complex >
Incident Ordering Contact	Incident Created On List View
irwinCID	Incident Name
TFR Effective Incident Date/Time	Incident Number
	Incident Type (incident_type) >

MODIFYING A REPORT

○ Using Advanced Filters

- Click New Criteria to add a new series of conditions, separate from the previous
- Click Related List Conditions to show only the results that have the selected number of related records

The screenshot shows a 'New Criteria' dialog box. At the top, there is a button labeled 'New Criteria'. Below it, a section titled 'RELATED LIST CONDITIONS' is expanded, showing a condition: 'Greater than or Equal to 1 selected table'. A dropdown menu is open, displaying a search bar with a magnifying glass icon and a search result: 'Aircraft Resource->Prepo Request'.

MODIFYING A REPORT

- Using Advanced Filters
 - Check your filters any time by clicking Run to execute the search and display resulting data without saving the changes.
- **Save your work frequently.**
 - If you inadvertently click on a link in your report results, you will leave the page and lose your work.

Demo 3

DEMO 3: MODIFY SAVED REPORT

Purpose:

You want to modify your saved (Demo 2) report to only show Bear Gulch incident requests (WA-OLF-000178) using complex filters

TASK 1. Open IROC Reports

1. Navigate to My Reports
 1. Search for your saved copy of IRQ300
2. Open the IRQ300 report
3. Change report name to Demo 3 Bear Gulch Request List
4. Insert and Stay

DEMO 3: MODIFY A SAVED REPORT

TASK 2. Modify report to include Bear Gulch incident requests only

1. Modify 'Incident' selection to 'Incident Number'
 1. Click arrow next to Incident in dropdown to drill down
2. Set Condition statement to 'is'
3. Enter WA-OLF-000178 in Data field
4. 'And' Incident Year 'is' 2025
5. Change incident Dispatching Organization condition to 'is anything'
6. Run report
 1. Confirm correct data
7. Save

DEMO 3: MODIFY A SAVED REPORT

All of these conditions must be met

Incident . Incident Number	is	WA-OLF-000178
Catalog	is anything	
Catalog Category	is anything	
Catalog Item	is anything	
Request Status	is anything	
Created	between	01-01-202... Today
Incident . Dispatching Organization	is anything	
Incident . Year	is	2025

AND

Demo 4

DEMO 4: MODIFY SAVED REPORT

Purpose:

You want to modify your saved Bear Gulch report to group requests by catalog

TASK 1. Open IROC Reports

1. Navigate to My Reports
 1. Search for your saved Bear Gulch Request List report
2. Open report
3. Change report name to Demo 4 Bear Gulch Request List by Catalog
4. Save

DEMO 4: MODIFY A SAVED REPORT

TASK 2. Modify report requests by Catalog

1. Modify 'Group By' to Catalog
 1. Open dropdown for Group By
 2. Set to Catalog
2. Run report
3. Save

The screenshot shows a report configuration interface with a breadcrumb trail: Data > Type > **Configure** > Style. The 'Configure' section contains three fields: 'Choose columns', 'Group by' (highlighted with a brown box and set to 'Catalog'), and 'Additional group by'. To the right, a summary table shows '3846 total Requests' and a list of categories with counts.

3846 total Requests			
▶	Unit Identifier	Unit Identifier	Incident
▶	Catalog: Aircraft	(229)	
▶	Catalog: Crew	(41)	
▶	Catalog: Equipment	(254)	
▶	Catalog: Overhead	(1557)	
▶	Catalog: Supply	(1765)	

Demo 5

DEMO 5: MODIFY SAVED IROC REPORT

Purpose:

You want to modify your saved Bear Gulch report to see how many requests were 'Cancelled UTF'

TASK 1. Open IROC Reports

1. Navigate to My Reports
 1. Search for your saved Bear Gulch Request List report
2. Open report
3. Change name to Demo 5 UTF
4. Save
5. Change report Group By to --None--

DEMO 5: MODIFY A SAVED REPORT

TASK 2. Filter report requests by Request Status

1. Modify 'Request Status' condition to 'is'
2. Select 'Cancelled UTF' in the data dropdown
3. Run report
4. How many requests were Cancelled UTF?
5. Save

Demo 6

DEMO 6: MODIFY SAVED IROC REPORT

Purpose:

You want to modify the columns of your report

TASK 1. Open IROC Reports

1. Navigate to My Reports
 1. Search for your saved Bear Gulch Request List report
2. Open report
3. Set Request Status to 'is anything'

DEMO 6: MODIFY A SAVED REPORT

1. Open choose columns modal
2. Add and remove columns to show only the following:
 1. Request Number
 2. Resource Name
 3. Resource Provider.Unit Identifier
 4. Catalog Item
 5. Special Needs
 6. Financial Code
 7. Released on Date
 8. Mobilization ETD Date
 9. Demobilization ETA Date
3. Run report
4. Save

Request Number	Resource Name	Unit identifier	Catalog Item	Request Status	Special Needs	Financial Code	Released On Date	Mobilization ETD Date	Demobilization ETA Date
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Demo 7

DEMO 7: MODIFY SAVED IROC REPORT

Purpose:

You want to modify the title at the top of the report
(Not the saved name of the report)

TASK 1. Open IROC Reports

1. Navigate to My Reports
 1. Search for your saved Bear Gulch Request List report
2. Open report

DEMO 7: MODIFY A SAVED REPORT

TASK 2. Filter report requests by Request Status

1. Select 'Style' tab
2. In Chart Title field, enter the name *Bear Gulch Training Report 1*
3. Change chart color to Critical Red
4. Change report name to Bear Gulch Training Report 1
5. Insert and stay
6. Save

PRINTING REPORTS

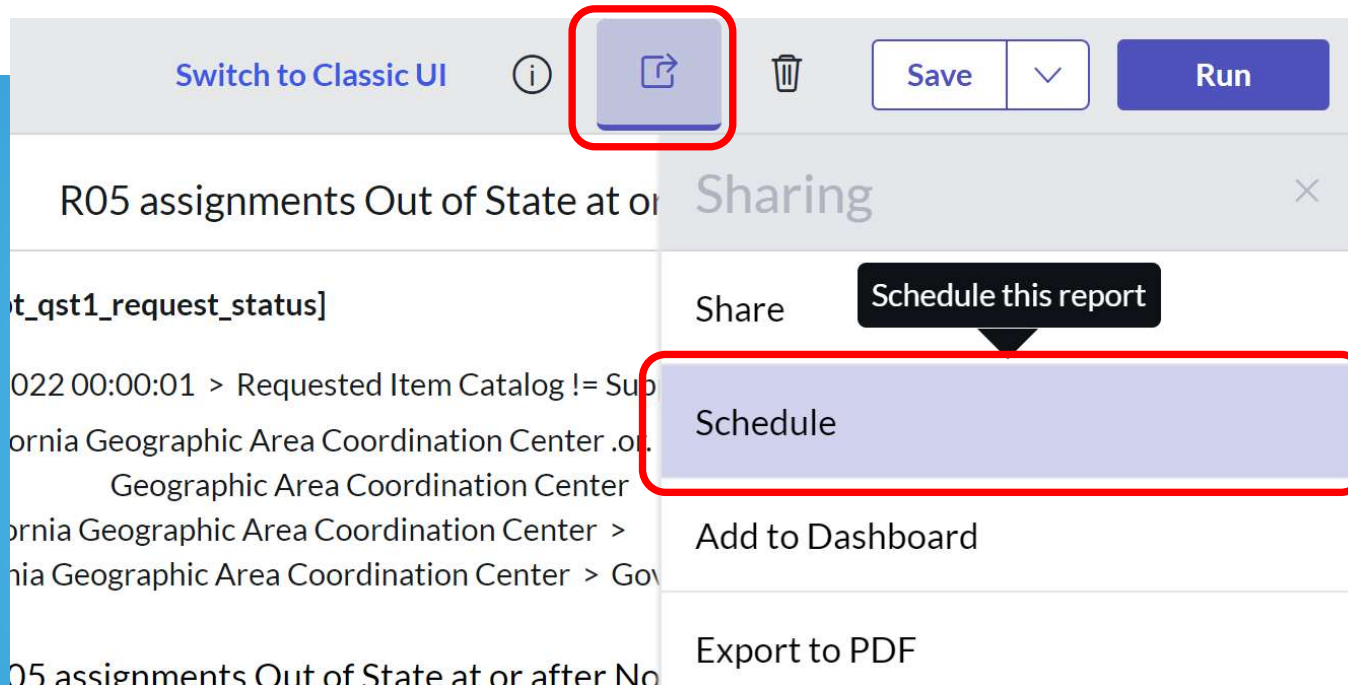
Printing Reports

There is no 'print' option in list view.

Options for printing:

- Right click the top of a column and export
- Open Sharing and export
- Open your user settings and select Printer Friendly Version

Scheduling Reports



IROC can automatically distribute reports to groups and individuals on your behalf.

- Click the **Sharing** icon to create report sharing options for the open report.
- Click **Schedule** to schedule report distribution in the scheduling options pane.

Scheduling Reports

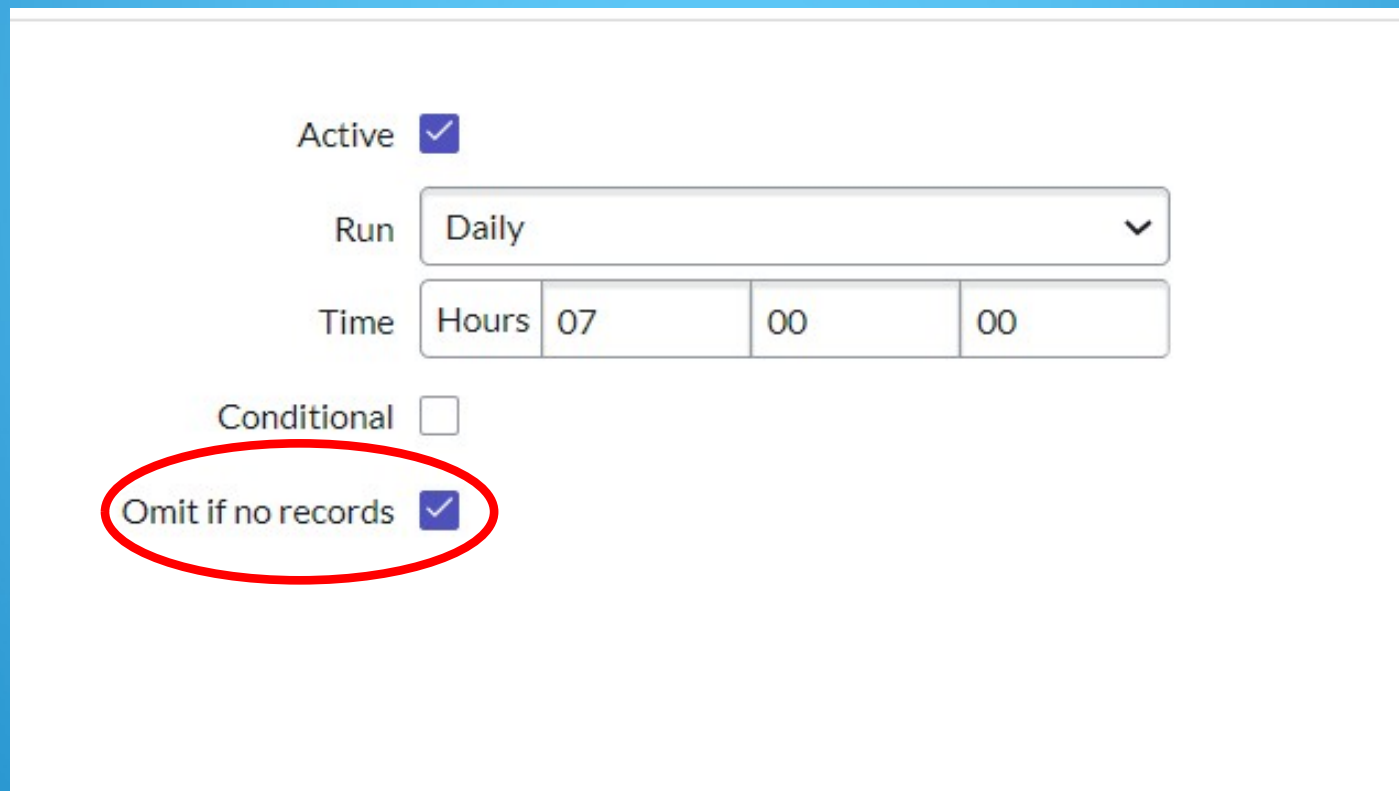
- Enter a descriptive **Name** for your report schedule.
- Select **Users**, **Groups**, and/or **Email Addresses** to distribute your report to.

The screenshot shows a web interface for scheduling reports. It features several input fields and a list of users and groups. The 'Name' field contains 'R05 assignments Out of State at or after Nov 20'. The 'Report' field contains 'R05 assignments Out of State at or after N'. The 'Users' field is a list box containing 'Matthew Ahearn' and 'James Tomaselli'. Below it, a search box contains 'tomas' and a dropdown menu is open, showing 'James Tomaselli', 'John Tomasini', 'Tomas Liogys', and 'Tomas Rivero'. The 'Groups' field is empty. The 'Email addresses' field contains 'Tim.Person@fire.ca.gov'. There are several icons to the right of the fields, including a magnifying glass, an information icon, a plus icon, a minus icon, a lock icon, and an envelope icon.

Group refers to dispatch ID. Choose users if you do not want everyone with center access to get the report.

Scheduling Reports

- Select the report **Run** frequency
- Check **Omit If No Records** to suppress the scheduled report .



The screenshot shows a configuration interface for scheduling reports. It includes the following elements:

- Active**:
- Run**: A dropdown menu set to **Daily**.
- Time**: A time selection grid with columns for **Hours**, **07**, **00**, and **00**.
- Conditional**:
- Omit if no records**: (This option is circled in red in the original image).

Scheduling Reports

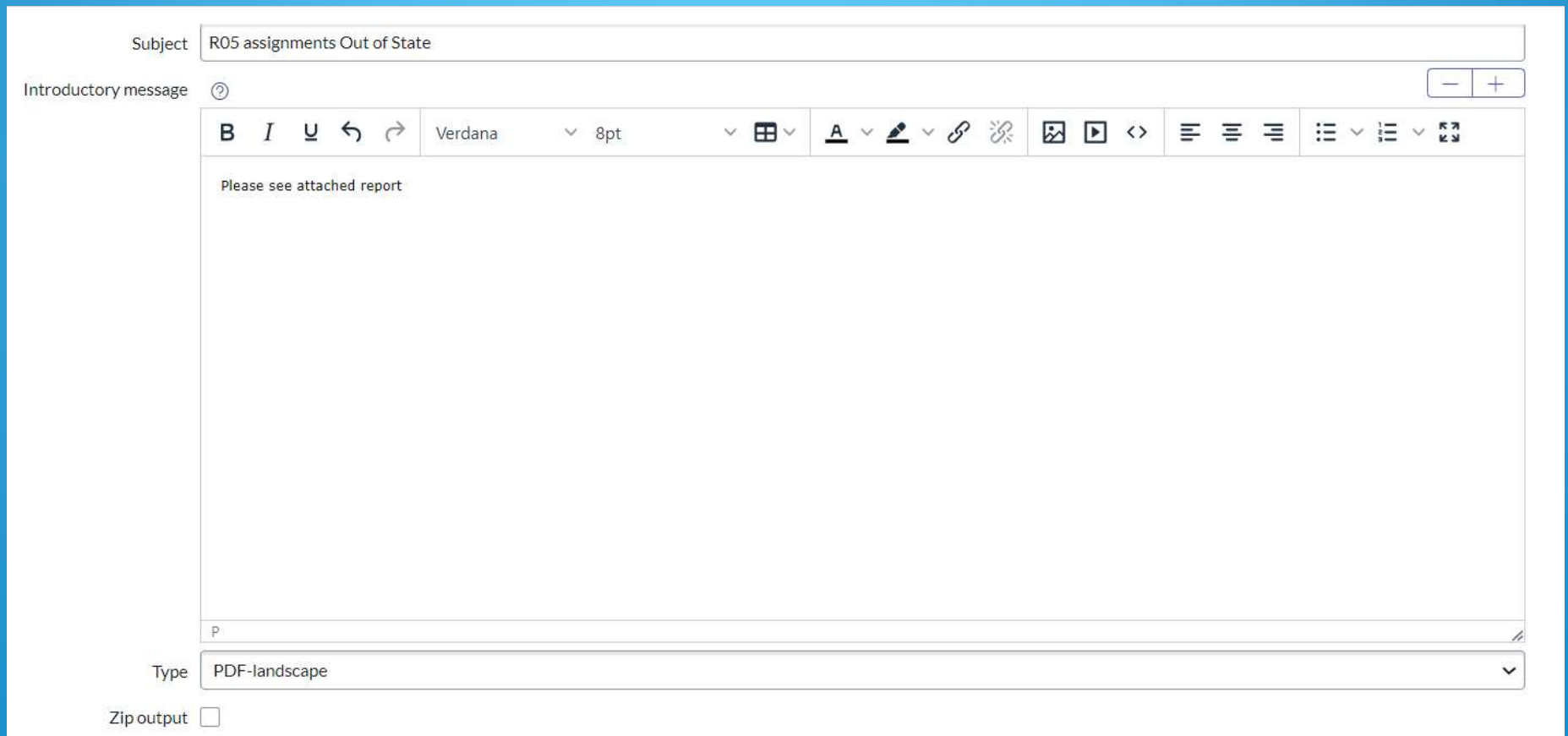
Enter a **Subject** and **Introductory Message** for the email that will accompany the report.

Subject

Introductory message

Type

Zip output

The image shows a web-based form for scheduling reports. At the top, there is a 'Subject' field with the text 'R05 assignments Out of State'. Below it is an 'Introductory message' field with a text area containing 'Please see attached report'. A rich text editor toolbar is visible above the text area, featuring icons for bold, italic, underline, undo, redo, font face (Verdana), font size (8pt), text color, background color, link, unlink, insert image, video, code, bulleted list, numbered list, and indent. Below the text area is a 'Type' dropdown menu set to 'PDF-landscape'. At the bottom left, there is a 'Zip output' checkbox which is currently unchecked.

Scheduling Reports

- To manage existing scheduled reports, select the **My Scheduled Reports** module from the IROC Reporting application.
- *To temporarily stop distributing a scheduled report, uncheck the **Active** box. Check the box again to reactivate the schedule.*

The End!