



Interagency Cache Logistics
Inventory Program

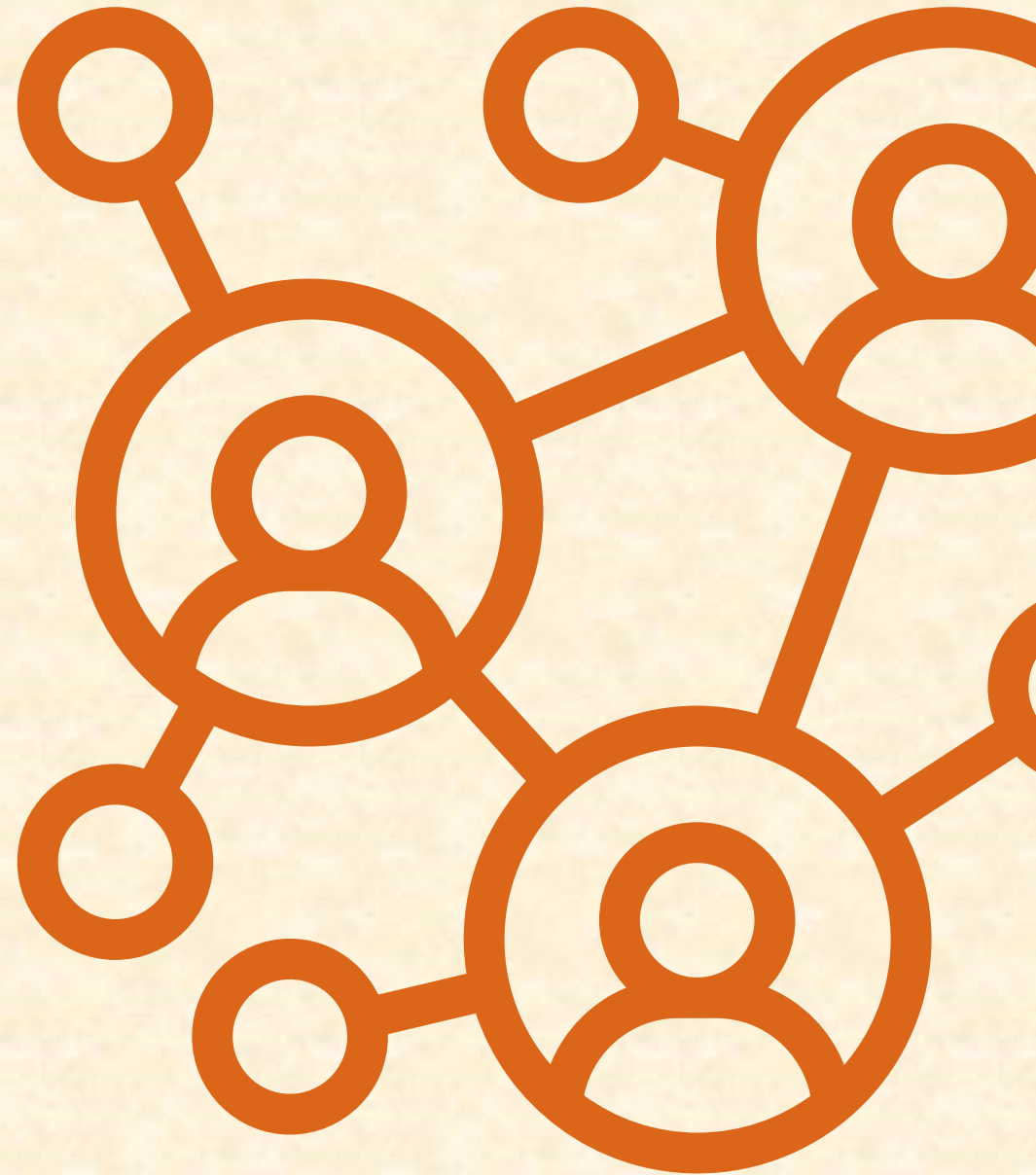
Spring Training Refresher 2026

Interagency Cache Logistics Inventory Program

04/20/2026 – 04/24/2026

Module #1

Training Info
General ICLIP Info



Purpose

**ICLIP
Overview and
Refresher**

**Hands-on
practice**

Goal

**Tips and
Tricks**

**Advanced
Training for
ICLIP**

Audience

Topics and Agenda

Each Day's Topics	Monday	Tuesday	Wednesday	Thursday	Friday
Info & Hands on Training	<u>Overview and Intro</u>	<u>User Security & Roles</u>	<u>Disposals</u>	<u>Reports</u>	<u>Q&A and Other Topics</u>
Tips	<u>Stockrooms</u>	<u>Purchase Orders</u>	<u>Incidents & Cost Centers</u>	<u>ICLIP on iPads</u>	<u>Resources</u>
			<u>ORDM Portal Process</u>		


Course Prework



Valid login to IROC Practice



Verify you have Cache Manager role in IROC Practice



Basic understanding of your role(s) in the cache.



Questions & Answers

Most questions will be answered on the spot or noted and answered during related content



Select the raised hand icon in the Reactions or Chat feature to ask questions at any time



Easy questions will be answered immediately



Additional comments will be discussed at the end of each module or during the Friday Q&A session

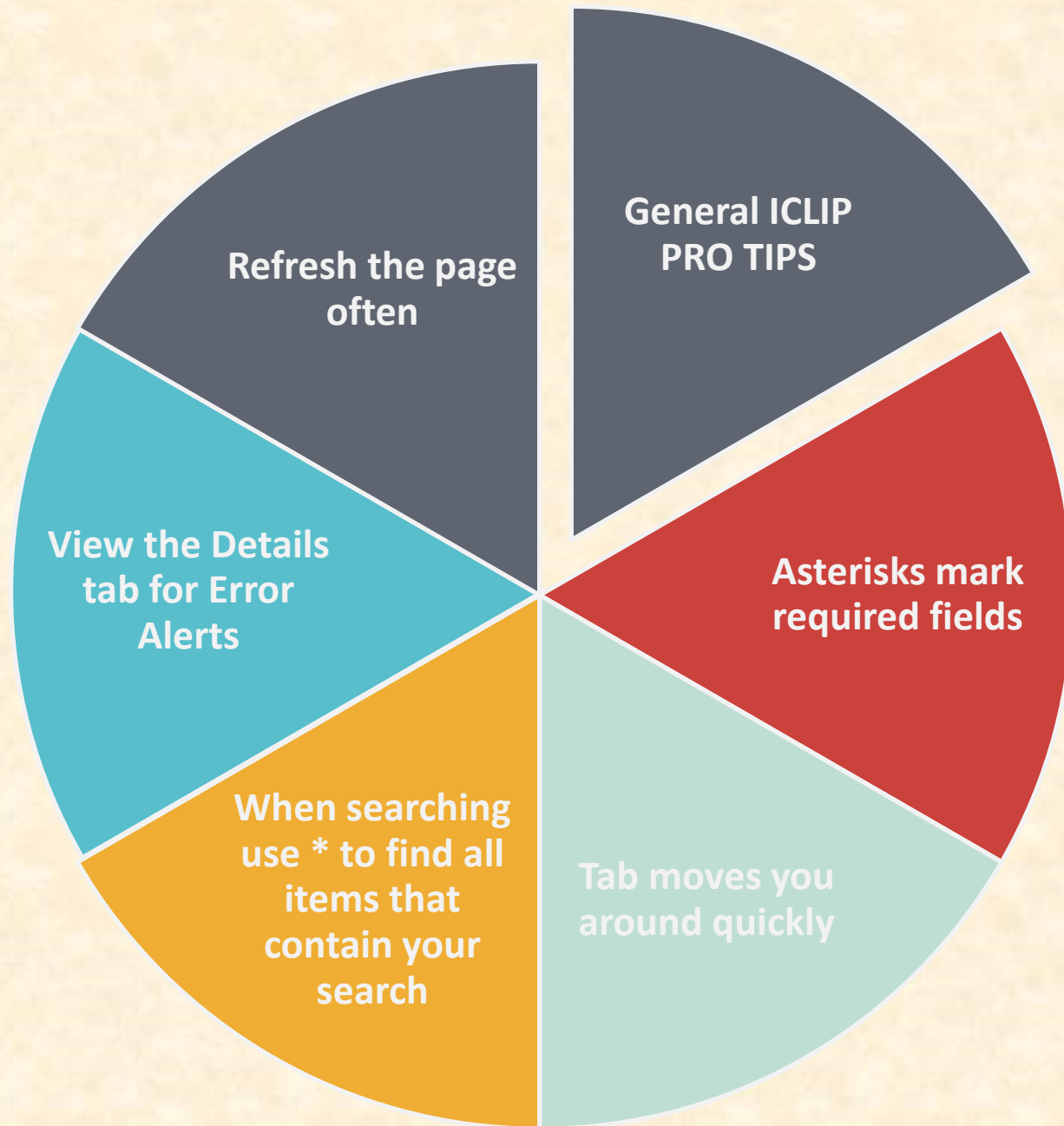
General ICLIP Resources and Links

ICLIP Knowledge

- Knowledge Articles (KBA's)
- Release Notes
- Known Issues

Wildfire.gov

- Change Management Committee information
- Knowledge Articles (KBA's)
- Release Notes & Monthly Newsletters
- Videos
- General User Support



Three Main Areas of ICLIP

#1 Enterprise Asset Workspace (EAW)
Mostly used for...

- Cache Users
- Daily Operations

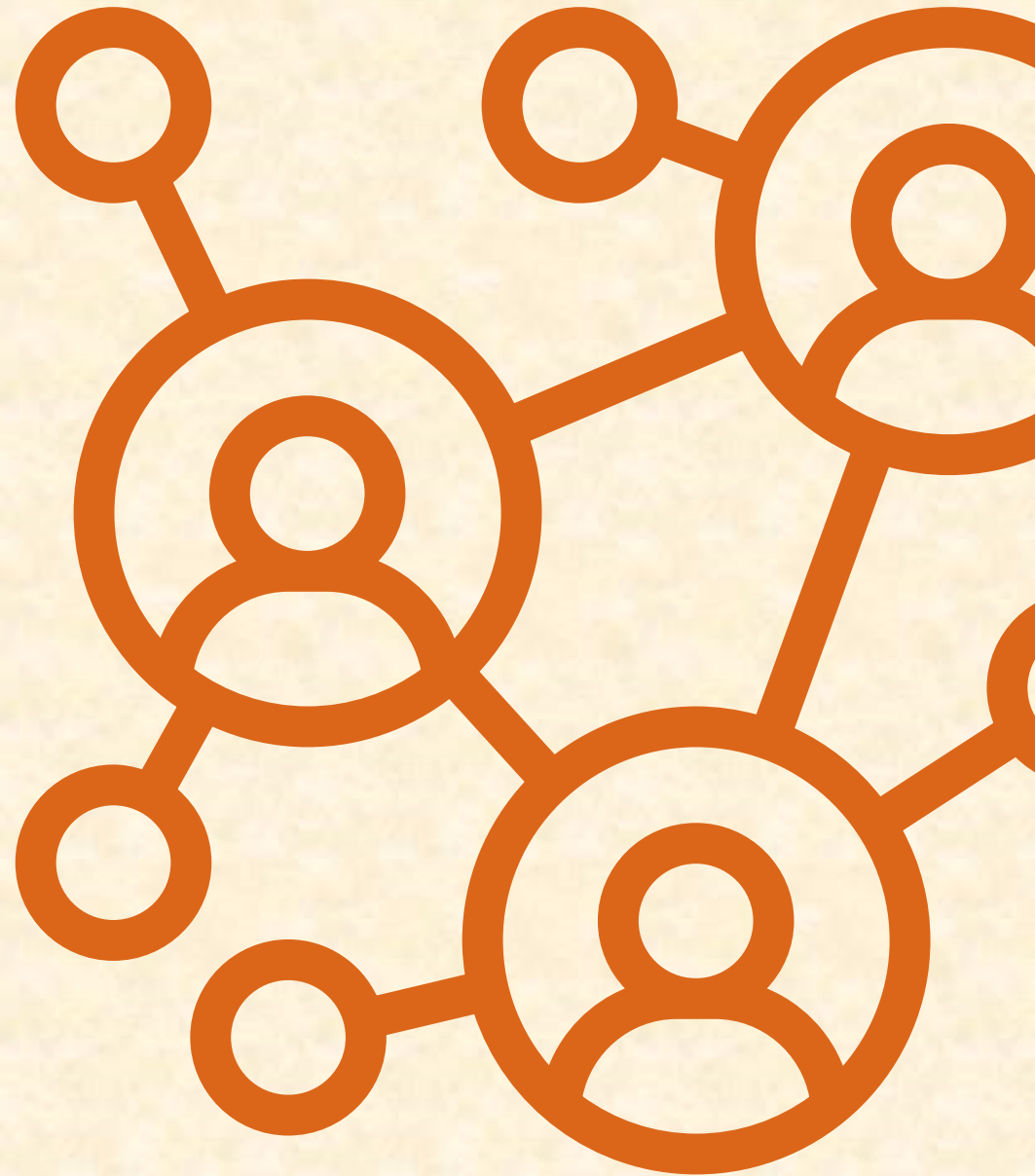
#2 DMT
Mostly used for...

- Cache Users
- Requesting C2C
- Creating Locations and Stock Room Configuration
- ICBS Billing Information Report
- User Roles and Security

#3 Portal
Mostly used for...

- Other Orders
- Incident orders by ORDM and Cache Users

Module #2
Stockrooms



Stockrooms: Expectation, Agenda, and Outcomes

Training Session

Expectations

Understanding how to manage your Cache Stockroom.

Agenda

This training will cover the following tabs in the Cache Stockroom:

- Details
- Enterprise assets
- Consumables
- Zones and Locations
- Stockroom Models

Outcomes

At the end of this section, you should be able to:

- Quickly search for inventory
- Understand how to use Kit Packing Reports
- Update records for consumables and trackables
- Create and edit locations
- Update inventory min/max

Cache Stockroom: What should I edit in the Details tab?

Update the Manager field in the Workspace

Navigation Path in EAW:

Workspace → Asset Operations → Cache Stockroom → Then select your cache

CORMK - Rocky Mountain Area Incident Support Cache


Details Task timeline Enterprise assets (2446) Consumables (2989) Ent

⋮ Stockroom Details

Name
CORMK - Rocky Mountain Area Incident Support Cache

Assignment group
CORMK) 🔍

Manager
Humberto Ontiveros 🔍



Cache Stockroom: What should I edit in the Details tab?

Update Account Code in the DMT


Navigation Path in DMT:

Open the **All** menu → Search 'Stockrooms' → Cache Stockroom → Then select your cache

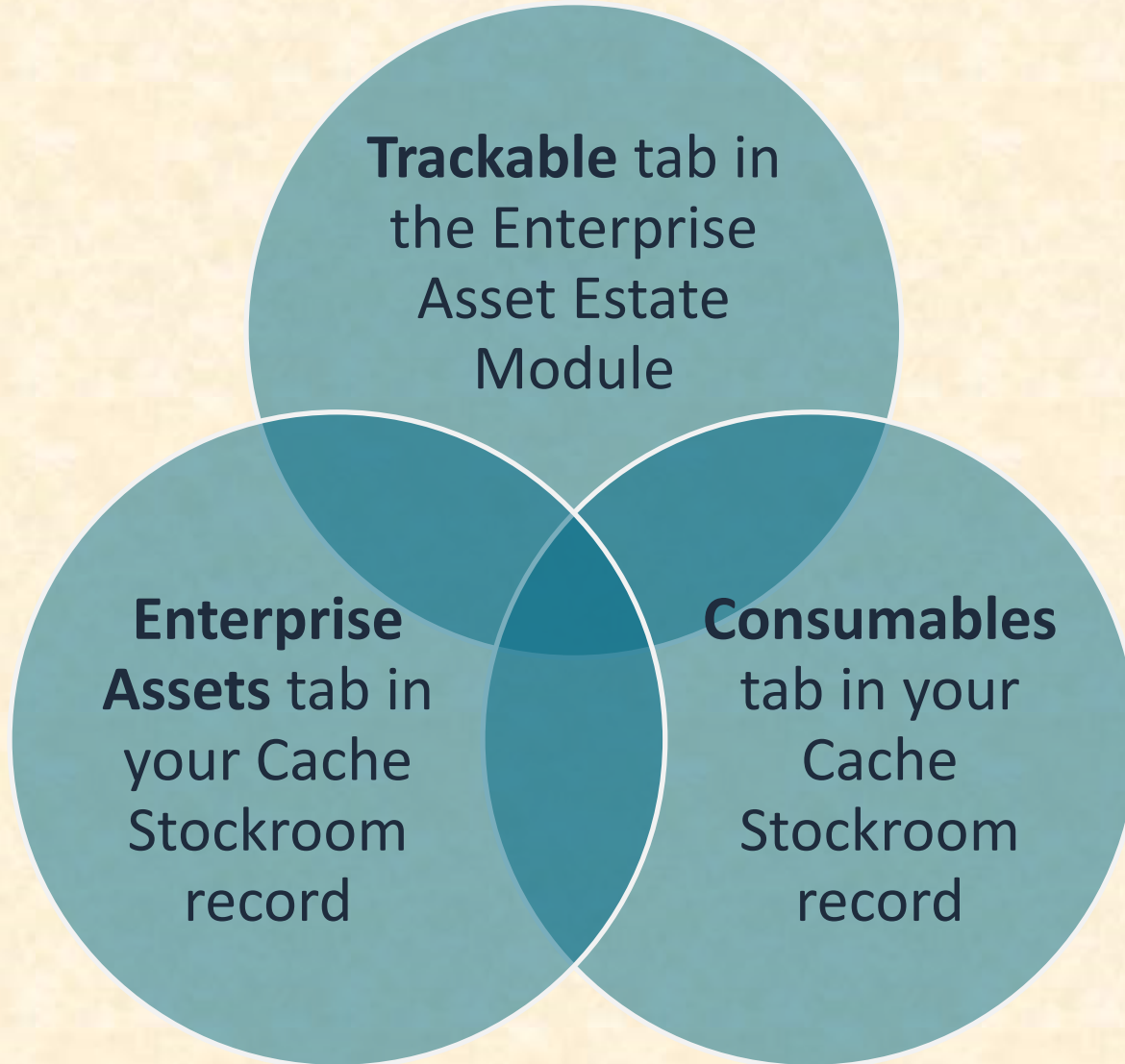
Stockroom
CORMK - Rocky Mountain Area Incident Support Cache View: ICLIP*

Name	CORMK - Rocky Mountain Area Incident Support Cache		
* Location	CORMK - Rocky Mountain Area Incident Support Cache <input type="button" value="Q"/>		
Manager	Humberto Ontiveros <input type="button" value="Q"/>	Default staging location	SHIP-SORT <input type="button" value="Q"/>
Type	Cache <input type="button" value="Q"/> <input type="button" value="i"/>	Default receiving location	RECEIVE-ZONE <input type="button" value="Q"/>

Account Codes

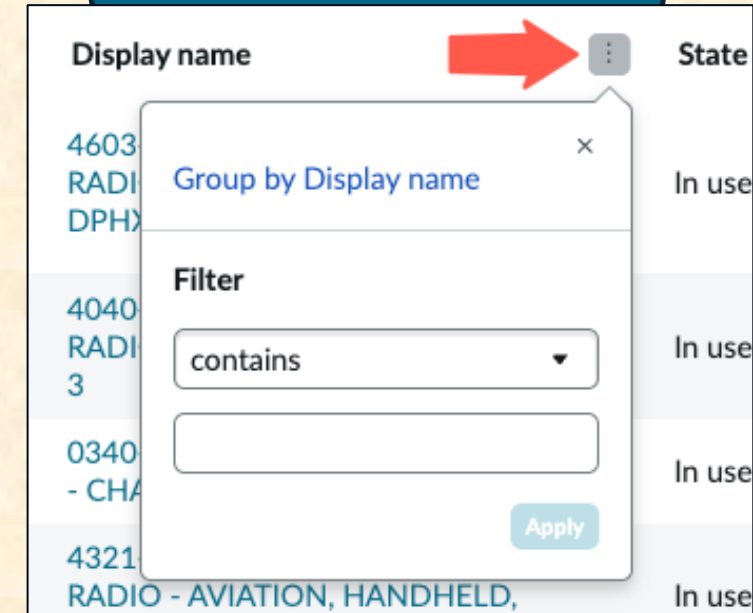
	Account Code	WGE5YB25	Shipping Account Code	PWD1MB25
	Account Override Code	0231	Shipping Account Override Code	1325

Cache Stockroom: How Do You Efficiently Search For Items?



Pro-tip:

- Familiarize yourself with the filter (three vertical dots) available next to each column name in each list.



Display name	State
4603 RADI DPH	In use
4040 RADI 3	In use
0340 - CHA	In use
4321 RADIO - AVIATION, HANDHELD,	In use

Group by Display name

Filter

contains

Apply

Cache Stockroom: How Do You Efficiently Search For Items?

Trackable tab in the Enterprise Asset Estate Module in the Workspace

Use Cases:

- **Trackables Tab:** Use this tab to search for trackables across *all* Caches.



Pro-tip:

- Familiarize yourself with the filter (three vertical dots) located next to each column name.



The screenshot shows the 'Enterprise asset estate' interface. The 'Trackables' tab is selected and highlighted with a green underline. A red box highlights the 'Trackables' icon in the left sidebar, with a red arrow pointing to the 'Trackables' tab. The table below shows a list of trackables with columns for 'Display name', 'Tags', 'State', 'Substate', and 'Asset tag'. A starburst icon is placed above the 'Tags' column header, and a filter icon (three vertical dots) is visible next to the 'Asset tag' column header.

#	Display name ▾	Tags	State	Substate	Asset tag
①	SFW-8696-153009 - 008696 - KIT - PUMP, PORTABLE, HIGH PRESSURE, BOX A (AKK SPECIFIC)		In use		SFW-8696-153009

Cache Stockroom: How Do You Efficiently Search For Items?

Enterprise Assets tab in your Cache Stockroom record in the Workspace

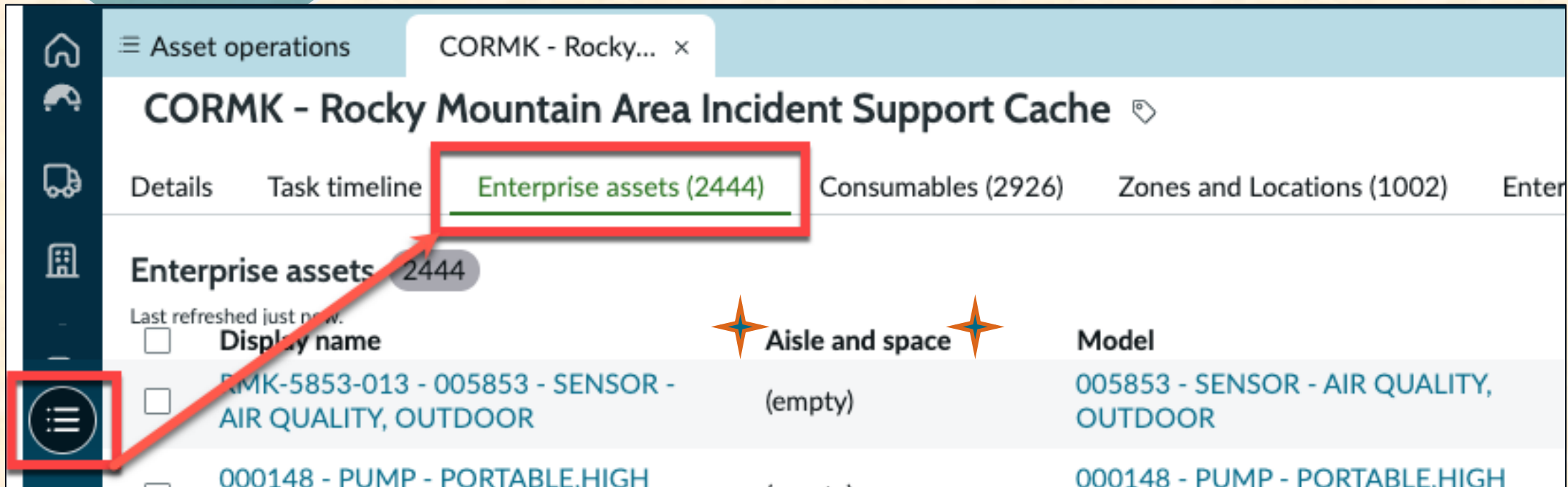
Use Cases:

- **Enterprise Assets Tab:** Search for trackables in *your* Cache Stockroom.



Pro-tip:

- Add the **Aisle & Space** column to the Enterprise Asset list.





Asset operations CORMK - Rocky... x

CORMK - Rocky Mountain Area Incident Support Cache

Details Task timeline **Enterprise assets (2444)** Consumables (2926) Zones and Locations (1002) Enter

Enterprise assets 2444

Last refreshed just now.

<input type="checkbox"/> Display name	 Aisle and space 	Model
<input type="checkbox"/> RMK-5853-013 - 005853 - SENSOR - AIR QUALITY, OUTDOOR	(empty)	005853 - SENSOR - AIR QUALITY, OUTDOOR
<input type="checkbox"/> 000148 - PUMP - PORTABLE.HIGH		000148 - PUMP - PORTABLE.HIGH

Cache Stockroom: How should you use a Trackable's record?

Navigation Path:

Workspace → Asset Operations → Cache Stockroom

Then:

Select your cache → Open Enterprise Assets/Consumables →
Select an item

Serial Numbers

- Update the serial number when building trackable kits

Work Notes

- Add work notes in the Activity Panel to include expiration dates or information pertinent to a Return. Additionally, Mechanics can track specific issues with a Work Order.

Kit Packing Report

- Click the Kit Packing Report to generate and view all items within the Kit.

Child Assets

- Viewing child assets within a kit, like a Cache Van, to ensure all trackables are accurate

Cache Stockroom: How Do You Efficiently Search For Items?



Consumables tab in your Cache Stockroom record in the Workspace

Use Cases:

- **Consumables Tab:** Search for non-trackables in your Cache Stockroom.



Pro-tip:

- Filter the **State** column to 'In Stock' and the **Substate** column to 'Available.'

Asset operations CORMK - Rocky... x

CORMK - Rocky Mountain Area Incident Support Cache

Details Task timeline Enterprise assets (2444) **Consumables (2926)** Zones and Locations (1002) Enterp

Consumables 2926
Last refreshed just now.

<input type="checkbox"/>	Display name	State	Substate	Quantity	Unit of measure
<input type="checkbox"/>	089911 - HOSE - OXYGEN	In stock	Available	83	Each
<input type="checkbox"/>	089911 - HOSE - OXYGEN			2	Each

Cache Stockroom: How should you use a Consumables record?



Navigation Path:

Workspace → Asset Operations → Cache Stockroom

Then:

Select your cache → Open Enterprise Assets/Consumables →
Select an item

Adjust Quantity

- Adjust item quantity up or down via the “Adjust Quantity” button

Pending evaluation 'Substate'

- Use this substate for items that are NRFI needing further evaluation or instruction from the WO

Splitting

- Use the Split button to place a specified quantity of an item on hold in the same location by updating its substate to 'Pending evaluation.' If the item is later returned to 'In Stock' and marked as available, it will automatically merge back into the existing inventory.

Work Notes

- Use work notes in the Activity Panel of Record

Cache Stockroom: Call out – Duplicate Consumable Records

Important:

If you encounter two non trackable records on the Consumables list that are identical and under the same location, please submit a ticket with the Help Desk. The Help Desk will merge the two records.

Example:

<input type="checkbox"/>	Aisle and space	Display name ^	Model category	State ∇	Substate	Quantity	Total value	Process ID
<input type="checkbox"/>	STOR1-03030101	000115 - HOSE - SUCTION, 1 1/2" NH X 10', RUBBER, RCKR LUG COUPL,9 NSHT/IN	Hose	In stock	Available	6	\$1,282.20	Returned Line Items: RTL00723
<input type="checkbox"/>	STOR1-03030101	000115 - HOSE - SUCTION, 1 1/2" NH X 10', RUBBER, RCKR LUG COUPL,9 NSHT/IN	Hose	In stock	Available	11	\$2,355.65	

Cache Stockroom, Zones & Locations: How does location creation work?

Note: This function is completed in the DMT

Navigation Path in DMT:

Open the **All** menu → Search 'Stockrooms' → Cache Stockroom → Then select your cache

CORMK - Rocky Mountain Area Incident Support Cache View: ICLIP*

Name: CORMK - Rocky Mountain Area Incident Support Cache

* Location: CORMK - Rocky Mountain Area Incident Support Cache

Manager: Humberto Ontiveros

Type: Cache

Default staging location: SHIP-SORT

Default receiving location: RECEIVE-ZONE

Update

Stockroom Models (1058) **Zones and Locations (1003)** Enterprise assets (2446) Consumables (2989) ICBS Trackable Items (1521) ICBS Stock Status (2090) Stock Status by Model Stock Status by Aisle and Space

Space Search Actions on selected rows... New

Stockroom = CORMK - Rocky Mountain Area Incident Support Cache

Display name	Location type	Aisle	Space	Size code	Move in sequence	Move out sequence	ICBS location
STOR1-19030201	Space	STOR1	19030201		100	119,030,201	119,030,201 STOR1-19030201



Cache Stockroom, Zones & Locations: How to create a new location



Aisle and space New record

Display name

* Stockroom

Location type

Active

1 * Aisle

2 Space

3 Size code

Current qty

Frozen

Exclude from pick

Aisle and space New record form:

1. Add Aisle (Existing)
2. Add Space (Newly created)
3. Add Size code
4. Add Move In/Move Out Sequence

What is the Size Code:
The size code indicates what fits in a specific location, not the cache's total capacity. It is separate from min/max settings and controls when items are sent to the first overflow location during put away.

Note: Aisle = Zone

Cache Stockroom, Zones & Locations: Updating Move in/out Sequences

Move in and Move out Sequences:

- Needs to be added after creating a new location
- Can be updated at any time

From the Cache Stockroom in the DMT:

1. Open the Zones and Locations tab
2. Double-click the cell and update the number.
3. Press enter or click the green checkmark

Stockroom Models (1060) **Zones and Locations (1004)** Enterprise 41521 ICBS Stock Status (2090) Stock Status by Model Stock Status by Aisle and Space

Space Search Actions on sel

Stockroom = CORMK - Rocky Mountain Area Incident Support Cache

Display name	Location type	Size code	Move in sequence	Move out sequence
REFURB-ZONE	Aisle	9,999,999	<input type="text"/>	<input type="text"/>
RECEIVE-ZONE2	Aisle	9,999,999	<input type="text"/>	<input type="text"/>

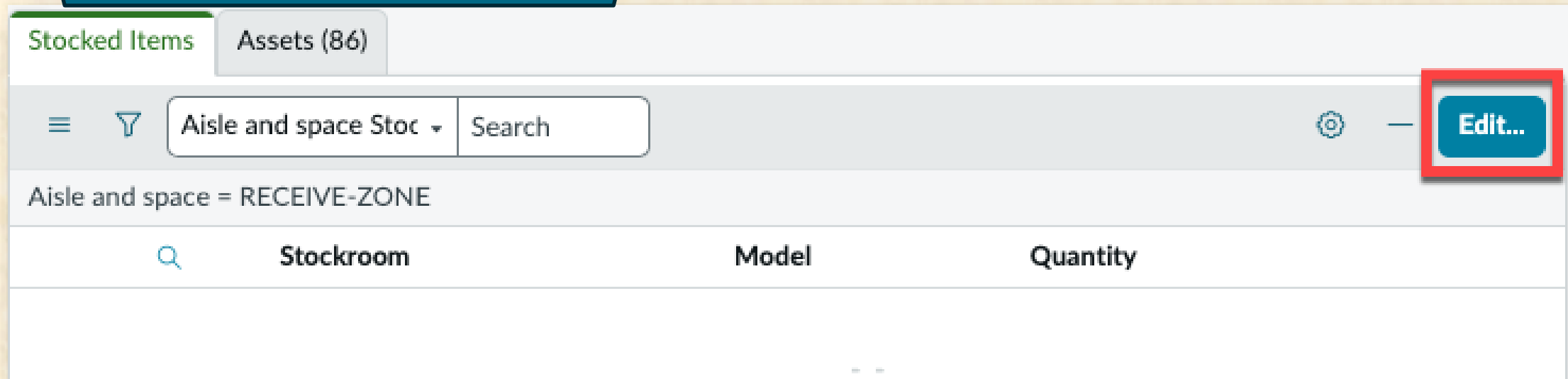
Cache Stockroom, Zones & Locations: Dedicating items to a new location

What does it mean to dedicate items to a new location?

- Dedicating items to a location ensures that only those items are allowed to be put away or moved into that location.

Navigation Path in DMT:

From your Cache Stockroom record → Select the newly created location → Click **Edit** in the Stocked Items tab



The screenshot shows the DMT interface with the 'Stocked Items' tab selected. The interface includes a search bar with the text 'Aisle and space Stoc' and a search button. Below the search bar, the text 'Aisle and space = RECEIVE-ZONE' is displayed. The main content area shows a table with columns for 'Stockroom', 'Model', and 'Quantity'. The 'Edit...' button is highlighted with a red box.

Stockroom	Model	Quantity

Cache Stockroom, Stockroom Models: Min Qty and Max Qty



Navigation Path in DMT:

Open the All menu → Search 'Stockrooms' → Cache Stockroom → Then select your cache → Stockroom Models tab

Model	Model categories	Min qty	Max qty	Owned	Av
089911 - HOSE - OXYGEN	First Aid	4	12	83	
089829 - SPLINT - WIRE MESH, 3-3/4 X 30,...	First Aid	20	60	34	

Min qty	Max qty	Owned
<input type="text" value="4"/>		
20	60	3

Pro tip: Double-click the Min/Max qty cell to quickly update the value.

Cache Stockroom, Zones & Locations: Editing an existing location

Updating a Location's Name:

- If you need to change a location name, create a new location instead. Editing or renaming will not update the Display Name. Delete the old location once it's no longer needed.

'Frozen' vs 'Exclude from pick' check boxes:

- **Frozen** = Prevents items from being put away into this location AND Prevents items from this location from being picked for pick tasks (includes Ad Hoc moves).
- **Exclude from pick** = Prevents items from this location from being picked for pick tasks.

Deleting a Stocked Item:

- It's recommended to delete a 'Stocked Item' when the item's stocked location changes and will no longer be stocked at your Cache Stockroom.

When deleting a stocked item, follow this best practice:

1. Ad Hoc the items in the 'Assets' tab
2. Delete the dedication "Stocked Item" record
3. Then Freeze the location

Tips and Tricks: Cache Stockroom, Deleting a location

Tip:

To delete a location, delete the 'Display Name' in the Zones and Locations tab in the Cache Stockroom record. **DO NOT** delete the Aisle/Space records.

Locations – build location “STOR1-35010101

Create location – Create new “Aisle & Space” record

Add size code – size code = 12,000

Move in/out sequencing – set according to your Cache processes

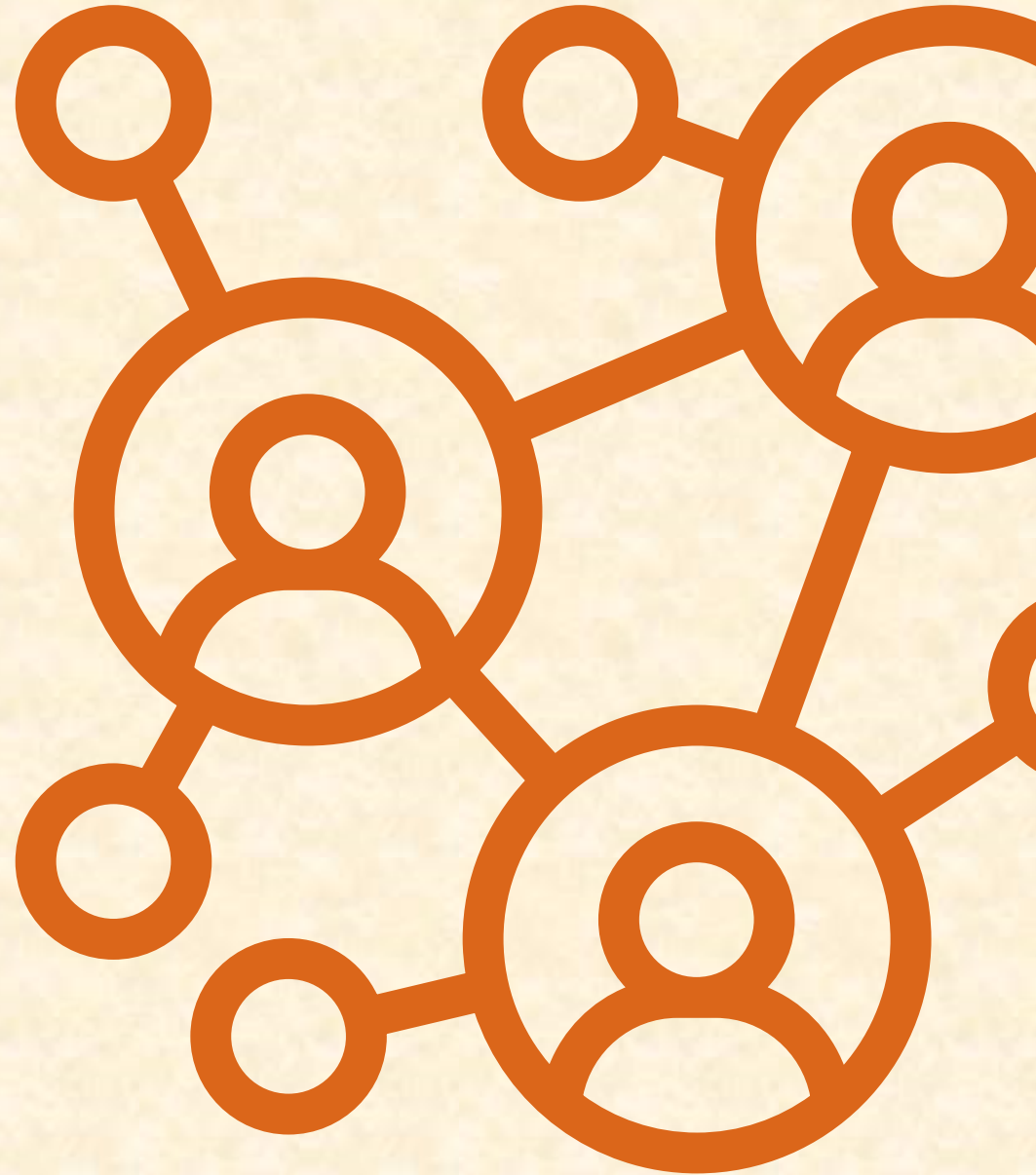
Dedicate items – dedicate NFES 0231, 0762, & 0147

Hands On Practice Module #2

Location Setup

Module #3

User Roles and Security



User Security & Roles: Expectations, Agenda, and Outcomes

Training Session

Expectations

- Understanding how to assign and remove user roles
- Understanding of which role to assign to users

Agenda

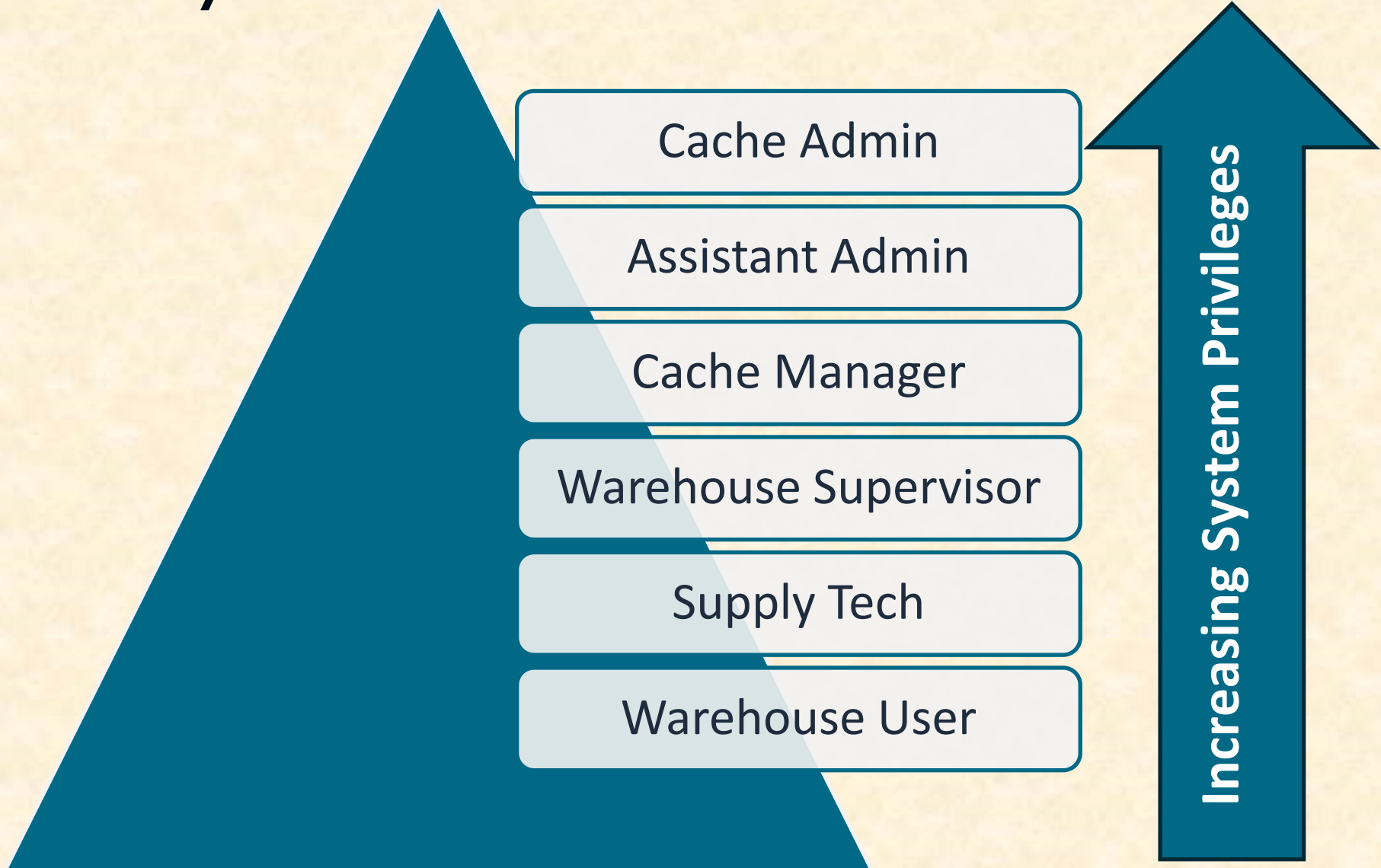
- Introduction
- Understand the fundamentals of user and group security tasks
- Hands-on practice

Outcomes

At the end of this section, you should be able to:

- Set up a persona for new users that ensures appropriate application access
- Remove or edit a user's persona
- Set a persona to active or temporary

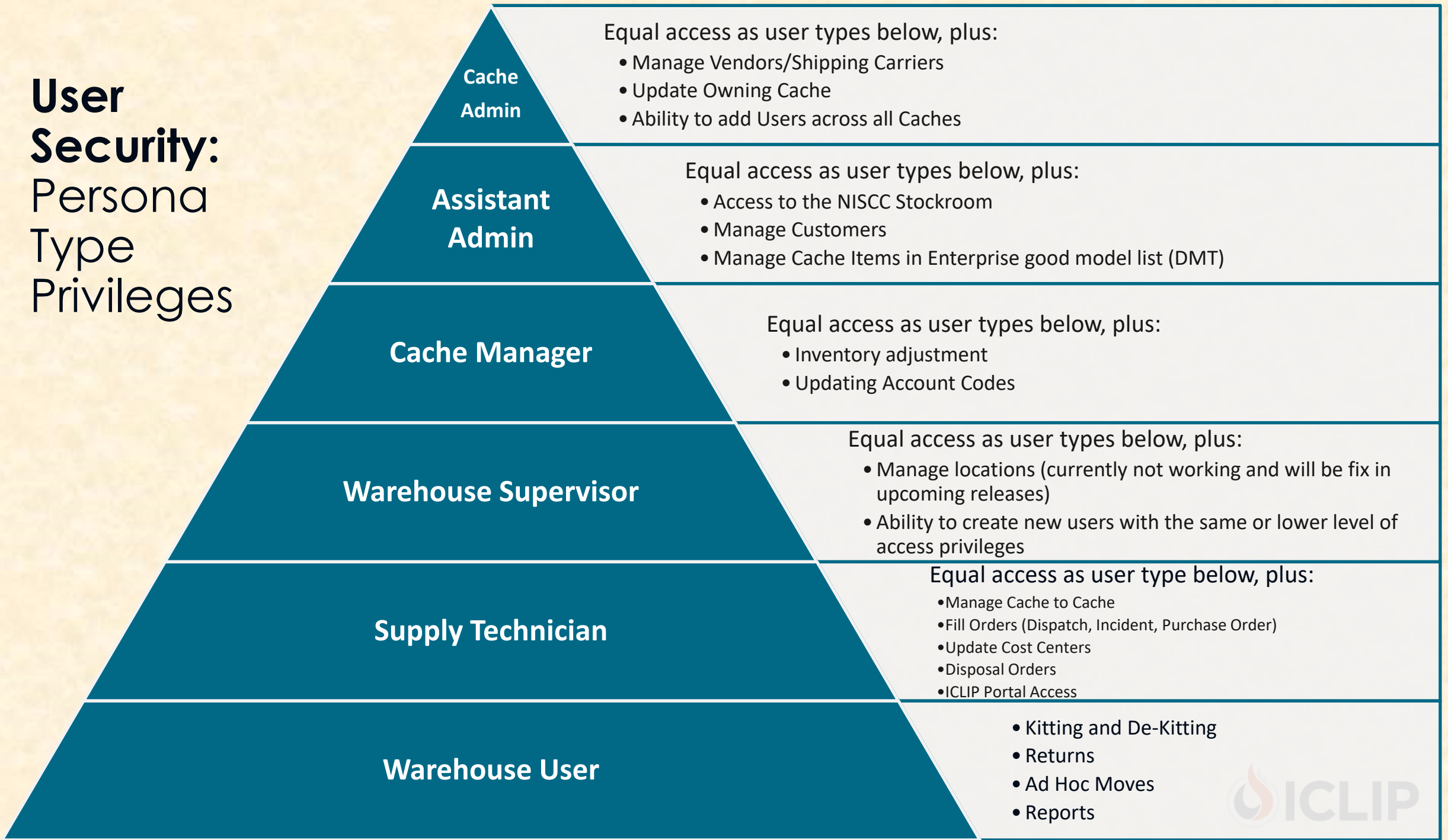
Persona Hierarchy



Future Roles:

- Radio Tech
- Kit Admin

User Security: Persona Type Privileges



User Security: Introduction

Navigation Path in DMT:

Open the All menu → Search 'Security' → User Security

Cache Administrators, Assistant Administrators, Cache Manager, and Warehouse Supervisors, set up personas for new users to ensure they have the appropriate application access. This includes:

- Removing or editing a user's persona
- Setting the user persona to active or temporary.



<input type="checkbox"/>	Number ▲	User	Cache
<input type="checkbox"/>	SEC0001061	Chris Funk	CORMK - Rocky Mountain Area Incident Sup...
<input type="checkbox"/>	SEC0001182	Helen Wright	CORMK - Rocky Mountain Area Incident Sup...
<input type="checkbox"/>	SEC0001243	Kelsey McCaslin	CORMK - Rocky Mountain Area Incident Sup...
<input type="checkbox"/>	SEC0001288	Andrew Beach	CORMK - Rocky Mountain Area Incident Sup...
<input type="checkbox"/>	SEC0001303	cindy camargo	CORMK - Rocky Mountain Area Incident Sup...
<input type="checkbox"/>	SEC0001316	Joshua Rumsey	CORMK - Rocky Mountain Area Incident Sup...

User Security: Managing User Security

Granting a user access:

1. From User Security List
2. Click New
3. Search and select the User
4. Select a Persona
5. Click Save

Note: The Temporary date range for detailers may not automatically deactivate access when it ends. Managers should still update the user's cache once the detailer leaves.

User Security New record

Number

Current

* User



Active

* Persona



Temporary

Assigning a User a new Persona:

1. Uncheck the "Active" box on their current security record
2. Create a new User record with the new Persona access

User Security

Add new user to cache

Assign new role to existing user

Remove existing user from cache

Hands On Practice Module #3

User Security and Roles

Module #4
Purchase Orders



Purchase Orders & Vendor Management: Expectations, Agenda, and Outcomes

Training Session

Expectations

- Understand how to create and manage purchase orders
- Understand how vendor management functions

Agenda

- Create and manage purchase orders for both consumable and trackable assets including DLA and Non-DLA Vendors
- Enter and manage vendor catalog item information.
- Discuss Price Variance
- How to handle situations involving under/over receiving

Outcomes

- At the end of this section, you should be able to:
- Create a new purchase order
 - Create and manage vendor catalog items
 - Work with purchase order line items
 - Export DLA Data

Questions & Answers

Most questions will be answered on the spot or noted and answered during related content



Select the raised hand icon in the Reactions or Chat feature to ask questions at any time



Easy questions will be answered immediately



Additional comments will be discussed at the end of each module or during the Friday Q&A session

Purchase Orders: Who manages Purchase orders?

Who?

- Cache Managers
- Warehouse Supervisors
- Supply Technicians

Vendor Setup

CARDIO PARTNERS INC
PO BOX 772834
DETROIT, MI 48277
615-657-7217

Shane.Burton@cardiopartners.com
[Cardio Partners](#)

Note: Cache Admins are the only user type that can create and manage Vendors/Shipping Carriers.

To add a new vendor – send the following information to Ricky, Cheri, and Reilly. Needs to be in ALL CAPS:

- COMPANY NAME; ADDRESS; PHONE NUMBER; EMAIL ADDRESS; WEBSITE

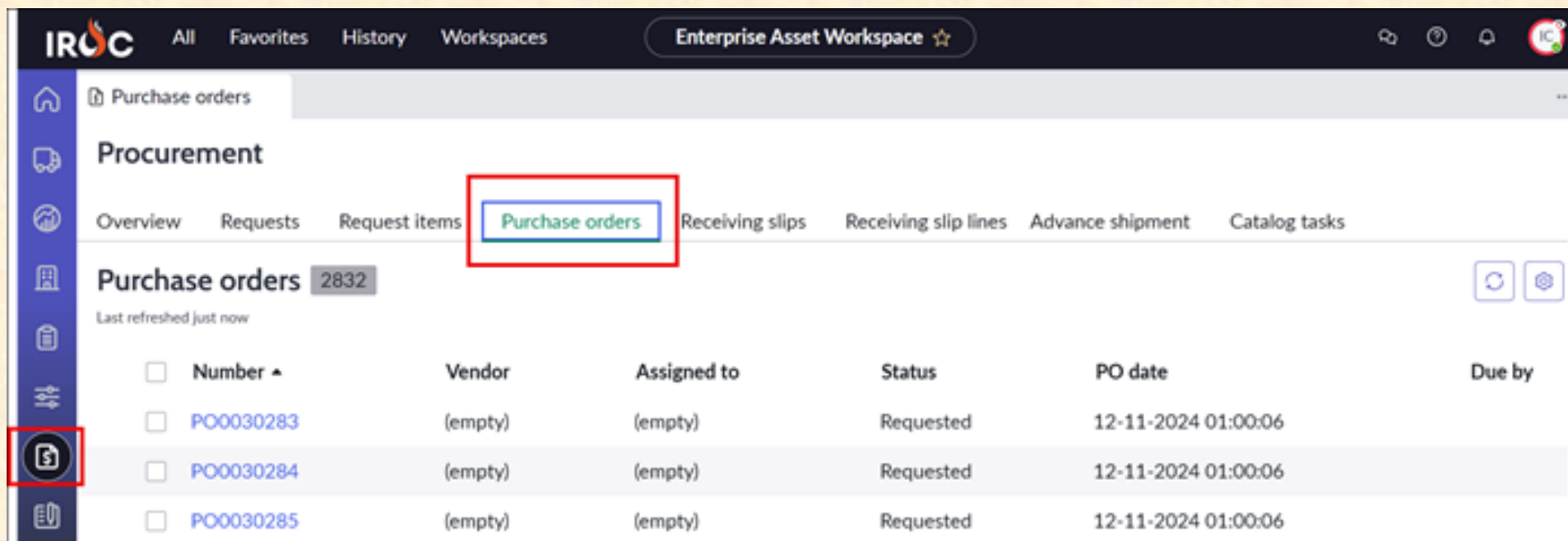
Once a Vendor has a record, users can add catalog items to the Vendor's record.

Purchase Orders: Introduction

Navigation Path in EAW:
 Workspace → Procurement → Purchase Orders tab

Purchase Orders

- This section will cover how to create and manage Purchase Orders. This includes a Non-DLA Purchase Order and a DLA Purchase Order.



The screenshot shows the IROC Enterprise Asset Workspace interface. The top navigation bar includes 'All', 'Favorites', 'History', 'Workspaces', and 'Enterprise Asset Workspace'. The left sidebar contains various icons, with the 'Purchase orders' icon highlighted. The main content area shows the 'Procurement' section with tabs for 'Overview', 'Requests', 'Request items', 'Purchase orders', 'Receiving slips', 'Receiving slip lines', 'Advance shipment', and 'Catalog tasks'. The 'Purchase orders' tab is selected, displaying a table with 2832 items. The table columns are: Number, Vendor, Assigned to, Status, PO date, and Due by. Three purchase orders are listed, all with a status of 'Requested' and a PO date of '12-11-2024 01:00:06'.

Number	Vendor	Assigned to	Status	PO date	Due by
<input type="checkbox"/> PO0030283	(empty)	(empty)	Requested	12-11-2024 01:00:06	
<input type="checkbox"/> PO0030284	(empty)	(empty)	Requested	12-11-2024 01:00:06	
<input type="checkbox"/> PO0030285	(empty)	(empty)	Requested	12-11-2024 01:00:06	

Purchase Orders: How to create a Non-DLA Purchase orders?

1. Complete the New Purchase Order Form

- Fill out all fields marked with an asterisk. Such as, Vendor, PO date, Contact name/number, Ship Rate, etc.

2. Add Purchase Order Line Items

- In the Details tab, add the Product Model, Cache Order Qty, Vendor Catalog Item, and the Vendor Order Qty
 - Review the Cache Order Quantity vs Vendor Order Quantity:
 - Vendor Std Pack
 - Vendor U/I vs (Cache) Unit of Measure
 - **Note:** If the Vendor Catalog item is not in the drop-down menu. Add a new Vendor Catalog Item in DMT.

3. Confirm Order

- Click the Confirm button

4. Receive Purchase Order Line Items

- Use the following columns: Number, Status, Product Model, Vendor U/I, Vendor Std Pack, Vendor Order Qty, Cache Order Qty, Purchase Order Cost, and Total cost.
- Receive items, enter quantity received, and enter serial numbers for Trackables
- Partially receive items as they arrive. Put away tasks will continue to be generated.

5. Complete Put Away Tasks

Purchase Orders: How to create a DLA Purchase order?

1. Complete the New Purchase Order Form

Purchase Orders: How to accept the Price Variance?

Navigation Path in EAW:
Workspace → Procurement → Variance Approval tab

Variance Approval: After completing a Purchase Order use the Variance Approval tab to:

1. Review the Purchase Order Cost field:
Click the 'i' in the Purchase Order field to access the record for additional details.
 - If the cost is incorrect, update it as needed. Then click **Save**.
 - If the cost is correct, no changes are required.
2. Review the Price Variance % field.
The Price Variance % field will show an updated percentage.



Next Steps

- Option 1:** If the Price Variance % is within the -10% to +10% range:
- The Purchase Order item is automatically approved and removed from the list. No further action is required.
- Option 2:** If the Price Variance % remains outside the -10% to +10% range:
- Confirm the cost is correct. Then select the **Variance Accepted** checkbox to manually approve the line item.
Once approved, the Purchase Order will be removed from the list.

The screenshot shows the 'Procurement' section of the EAW system. The 'Variance Approval' tab is highlighted with a red box. Below the navigation tabs, there are filter and sorting options. A table of purchase order line items is displayed with the following columns: Number, Received, Product Model, Cost, Purchase Order Cost, Price Variance %, and Variance Accepted. The first row shows a purchase order with a price variance of -22.99% and the 'Variance Accepted' checkbox is unchecked.

Number	Received	Product Model	Cost	Purchase Order Cost	Price Variance %	Variance Accepted
POL0010101	05-27-2025 16:04:23	000929 - CARTON - FIBERBOARD, 41" X 15 1/2" X 25"	\$18.18	\$14.00	-22.99	<input type="checkbox"/>

Hands On Practice – Module #4 – Purchase Orders

Make sure you have these specific columns added in to the POL items tab

Number ▲	Status	Product Model	Vendor U/I	Vendor Std Pack	Vendor Order Qty	Unit of measure	Cache Order Qty	Purchase Order Cost	Total cost
POL0012510	Received	000222 - TAPE - FILAMENT, 1" X 60 YD	RO	36 ROLLS PER CASE	72	Roll	72	\$4.25	\$306.00
POL0012511	Received	000762 - TAPE-GAFFERS, BLACK, 2" X 50 YD, 11 MIL, 3" CORE			72	Roll	72	\$19.00	\$1,368.00
POL0012512	Received	000021 - BAG - GARBAGE CAN LINER, PLASTIC, 30 GL, 39" X 33"	BX	BOX	10	Box	10	\$49.00	\$490.00

Number

Status

Product Model

Vendor U/I

Vendor Std Pack

Vendor Order Qty

Cache Order Qty

Purchase Order Cost

Total Cost

Hands On Practice - Module #4 - Purchase Orders

Create and Receive a new PO and edit Purchase Order Cost information



Include new Trackable Assets and how to add Property and Serial Numbers



Create a DLA PO with U/I conversion items



Price Variance acceptance

Hands On Practice – Module #4 – DLA Purchase Orders

Knowledge Check: This screenshot displays the correct Vendor Order Qty vs Cache Order Qty for a DLA Purchase Order. Check if your Purchase order line items tab looks identical.

Number ▲	Status	Product Model	Vendor U/I	Vendor Std Pack	Vendor Order Qty	Cache Order Qty	Purchase Order Cost	Total cost
POL0012516	Ordered	001239 - HOSE - SYNTHETIC, LINED, 1 1/2" NH X 100'	SD	1 SD/100 LG	2	200	\$237.13	\$47,426.00
POL0012517	Ordered	000727 - BANDS - RUBBER, HOSE, 1 3/8" X 9 1/2"	BX	325/BX	2	650	\$0.30	\$195.00
POL0012518	Ordered	001016 - HOSE - GARDEN, SYNTHETIC, 3/4" NH X 50'	SD	1 SD/480 LG	1	480	\$32.31	\$15,508.80
POL0012519	Ordered	000148 - PUMP - PORTABLE,HIGH PRESSURE W/FUEL LINE	EA		5	5	\$5,354.46	\$26,772.30
POL0012520	Ordered	000231 - VALVE - WYE, GATED, 1 1/2" NH-F X 1 1/2" NH-M X 1 1/2" NH-M	EA	EA-10/BX	100	100	\$125.63	\$12,563.00

Purchase Orders: Adjusting Quantities Scenarios

What should you do if you over receive items from a Purchase order?

If you need to over receive create a new Purchase order with the additional received inventory.

- If you accidentally over receive on a Purchase order, contact the Help Desk to fix the POLs.

What should you do if you under receive items from a Purchase order?

Continue processing the Purchase Order, receive the items for the original quantity requested.

- Use the Adjust Quantity button. In the form include notes with the Purchase Order# and details on the items that were not received and why there was a shortage.

Note: If the shortage is over \$20,000, submit a ticket with the Help Desk to adjust the quantity.

What should you do if you need to cancel a Purchase order in progress?

Do not use the Cancel button. Instead, complete the Purchase order and then use the Adjustment Quantity button to fix the inventory.

Tips & Tricks

Purchase Orders & Vendor Mgt

Creating PO

- Can't add items if they haven't been previously entered into the "Vendor Catalog Items" in the Vendor Record

Cancelling a PO

- If the PO is in Received State and there are put away tasks generated, do not click the cancel button

For Non-DLA Orders

- Use the *white* export button on the POL List to do a quick export of all POL items

Price Variance Approval

- Review the UOM when determining whether the cost is accurate

Price Variance Approval

- PO items are automatically removed from the list if the cost is 10% +/-

Price Variance Approval

- PO items with updated costs that remain on the list must be manually approved for the line item to be removed

For DLA Orders

- Don't click "order" until hearing back from DLA so the POL's can be adjusted depending on what is getting "filled or killed"

For Trackable Orders

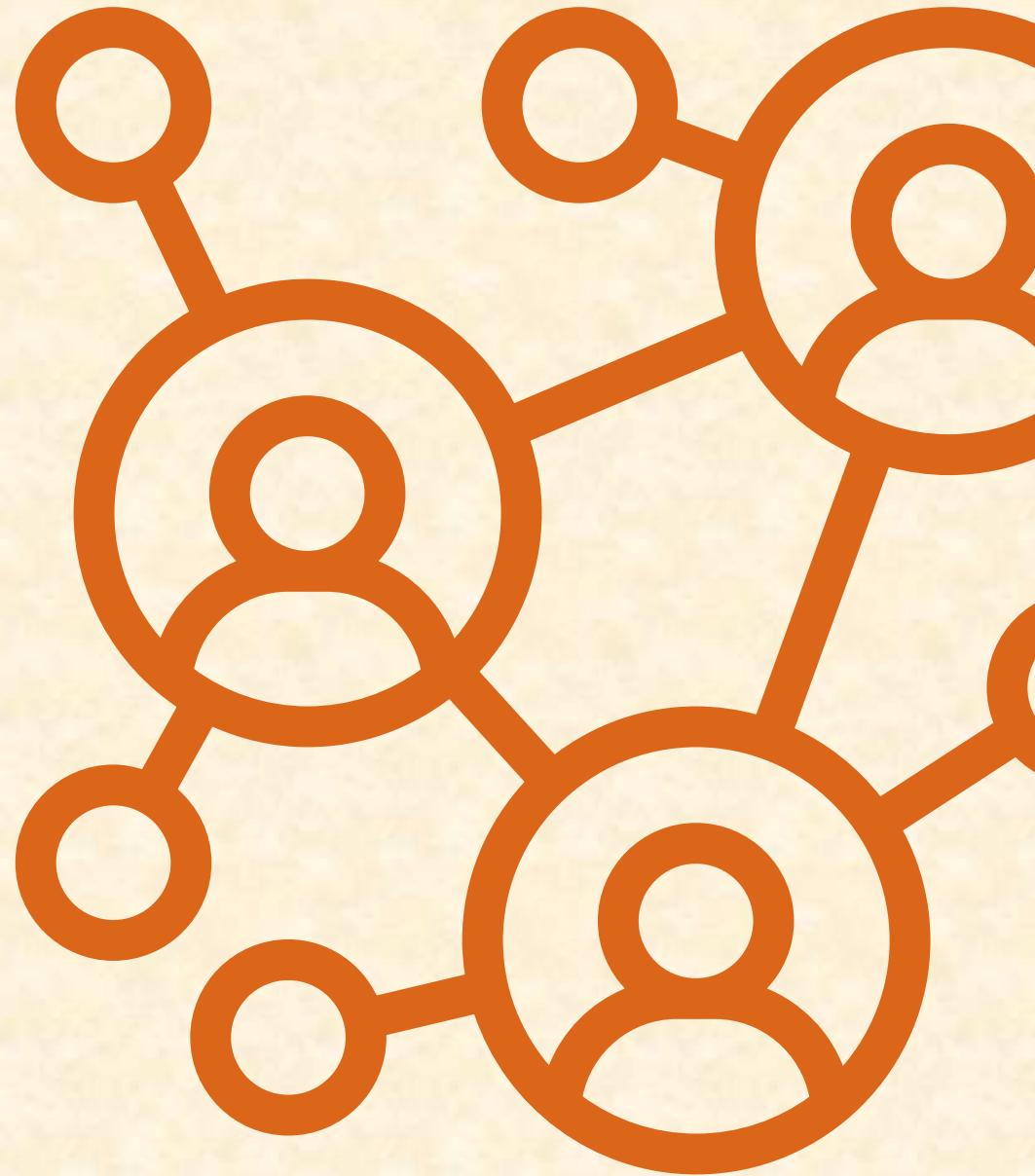
- When receiving property, click the icon on the receive line to enter Trackable assets tags and serial numbers

For Trackable Orders

- Currently users can re-use a current Trackable ID that is already in use.
- Check your data to ensure you start with the correct Trackable ID that you left off with

Module #5

Disposals



Questions & Answers

Most questions will be answered on the spot or noted and answered during related content



Select the raised hand icon in the Reactions or Chat feature to ask questions at any time



Easy questions will be answered immediately



Additional comments will be discussed at the end of each module or during the Friday Q&A session

Disposal Orders: Expectations, Agenda, and Outcomes

Training Session

Expectations

- Understand different types of disposals
- Utilize the different disposal types to update records

Agenda

- Learn how to manage trackable disposal orders in ICLIP's Enterprise Asset Workspace.

Outcomes

At the end of this training, you should be able to:

- Manage Disposal Orders
- Track and dispose assets on a yearly basis that aren't returned from an incident

Managing Disposal Orders Introduction

What are Disposal Orders used for?

- Used for assets lost or damaged on an Incident, or phasing out old/outdated equipment (i.e., radios)
- Disposal Orders can be created for Trackable Assets.

Managing Disposal Orders

Reasons For Disposal

Don't use Expired, Donation, or Receipt Error as Reasons for Disposal

Damaged

Asset damaged on incident

Excess

GSA Excess

Lost

Asset lost on incident

Unserviceable

Asset unable to be repaired but not tied to an incident

Other

User fill in reason for "Other"

Disposal Obsolete

Asset is outdated equipment

Tips & Tricks Managing Disposal Orders

Details Tab

- If the **Close Task** button does not work, view the **Details** tab for an Error Alert indicating "The following mandatory fields are not filled in:..." After the error is corrected, close the task.

Refresh

- Throughout the workflow, when accessing a Workspace tab or a related list tab, click the refresh button to reload the page and get the most up-to-date information.

Attachments

- When importing disposal documentation use the "attachments" pane along the right side of the Disposal Order Details and upload a file with the "select file" button. Users will need to upload a PDF to complete the disposal process.

Hands On Practice Module #5

Disposal Orders

Dispose a trackable asset from an Incident

- State/Substate = In Use
- Use Disposal Reason: Damaged or Lost

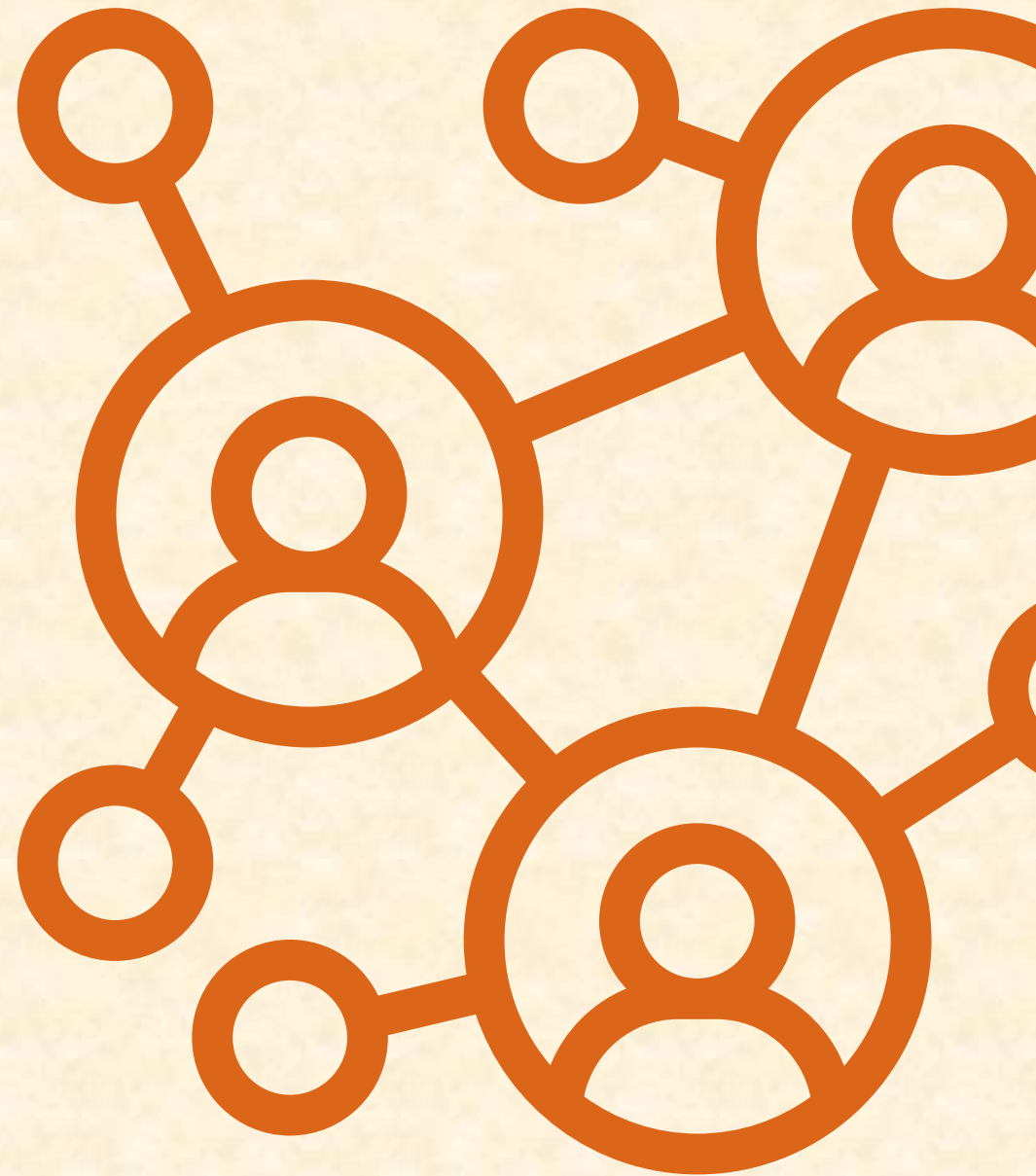
OR

Dispose trackable asset from Stockroom

- State/Substate = In Stock/Available
- Use Disposal Reason: Excess, Unserviceable, Other, or Disposal Obsolete

Module #6

Incidents



Incidents & Cost Centers: Expectations, Agenda, and Outcomes

Training Session

Expectations

- Understand how to manage Incidents and Cost Centers

Agenda

- Introduction
- Incident and Other Order Information:
 - ICLIP and IROC Incident details
 - Incident Owning Cache
 - Expense Lines
- Cost Center Information:
 - Financial Code verification
 - Troubleshooting missing Financial Codes
 - Expense Lines

Outcomes

At the end of this section, you should be able to:

- Manage existing Incidents and Cost Centers
 - Incident Owning Cache
 - Edit or update Cost Centers
 - Cost Center and Financial Code verification

Incident: Where to locate Incident Information?

Navigation Path in EAW:

Workspace →
Asset Operations →
Incidents →
Select Incident Record

ICLIP Incident Record contains:

- ICLIP Incident Number and IROC Incident Number may be formatted differently
 - i.e., 2025-ORMAF-025245 vs OR-MAF-025245
- Cost Center
- Owning Cache

Tip:

Search using the IROC Incident field using Name or Number

Navigation Path in EAW:

Workspace →
Asset Operations →
Incidents →
Select Incident Record →
Select IROC Incident Record (i)

IROC Incident Record contains:

- Financial Codes
- Billing Organizations and Subdivisions
- Incident “Status” and “Activity”
- Default Cache

Tip:

Pay attention to the Financial Code flagged “true”

Viewing and Managing Cost Centers



Who?

Cache Administrators

Assistant Administrators

Cache Managers

Warehouse Supervisors

Supply Technicians



What?

Create or Edit a Cost Center

Verify Cost Center data

Troubleshoot entering Cost Center information.



Where?

All Cost Centers: EAW → Asset Operations → Cost Centers

Incidents: EAW → Asset Operations → Incidents → Incident record → Cost Center (i)

Other Orders: EAW → Asset Operations → Other Orders → Other Order record → Cost Center (i)

Cost Centers Information

ICLIP Cost Center Record details contains:

- Verification flag
- Suppression flag
 - If Suppression is flagged: Cost Center record will display all three FS/BLM/State Financial Code fields
 - If Suppression is NOT flagged: Cost Center record will display the Financial Code of the selected agency
- Active flag
- FireCode: Acts as the “Display Name” of the Cost Center when marked “Suppression”
 - Current bug exists that does **not** always update this field when the incident is converted from an ABCD Misc. Financial Code to an official FireCode
- Incidents/Other Orders associated to the Cost Center
- All Expense Lines for all Incidents/Other Orders associated

Changing Cost Centers

What does changing Cost Centers do?

- Allows you to add or edit codes for an Incident or Other Order in ICLIP
 - This change does not affect anything within the IROC Incident information
- This will be the code that shows by default for that Incident/Other Order in ICLIP for every Dispatch, Incident, or Customer order submitted afterward

Tips and Tricks: Incidents & Cost Centers

STOP

Before creating a new Cost Center, thoroughly search the existing Cost Center list to ensure it does not already exist in the system.

Incident Order Banner Message:

"Please verify the information on this Cost Center and click the 'Financial codes Verified' checkbox."

Click the hyperlink in the banner to access and verify the specific Cost Center record is correct.

Agency Account Code fields missing on Cost Center record?

Individual fields may be collapsed. Click the arrow on each bolded Agency title section to expand or collapse that section.

Cache Best Practices:

Different agencies can "verify" the Cost Center, and the pop-up banner will **not** appear for any other agency. All Caches should verify Cost Center data for every Incident/Other Order they support regardless of the prompted banner message.

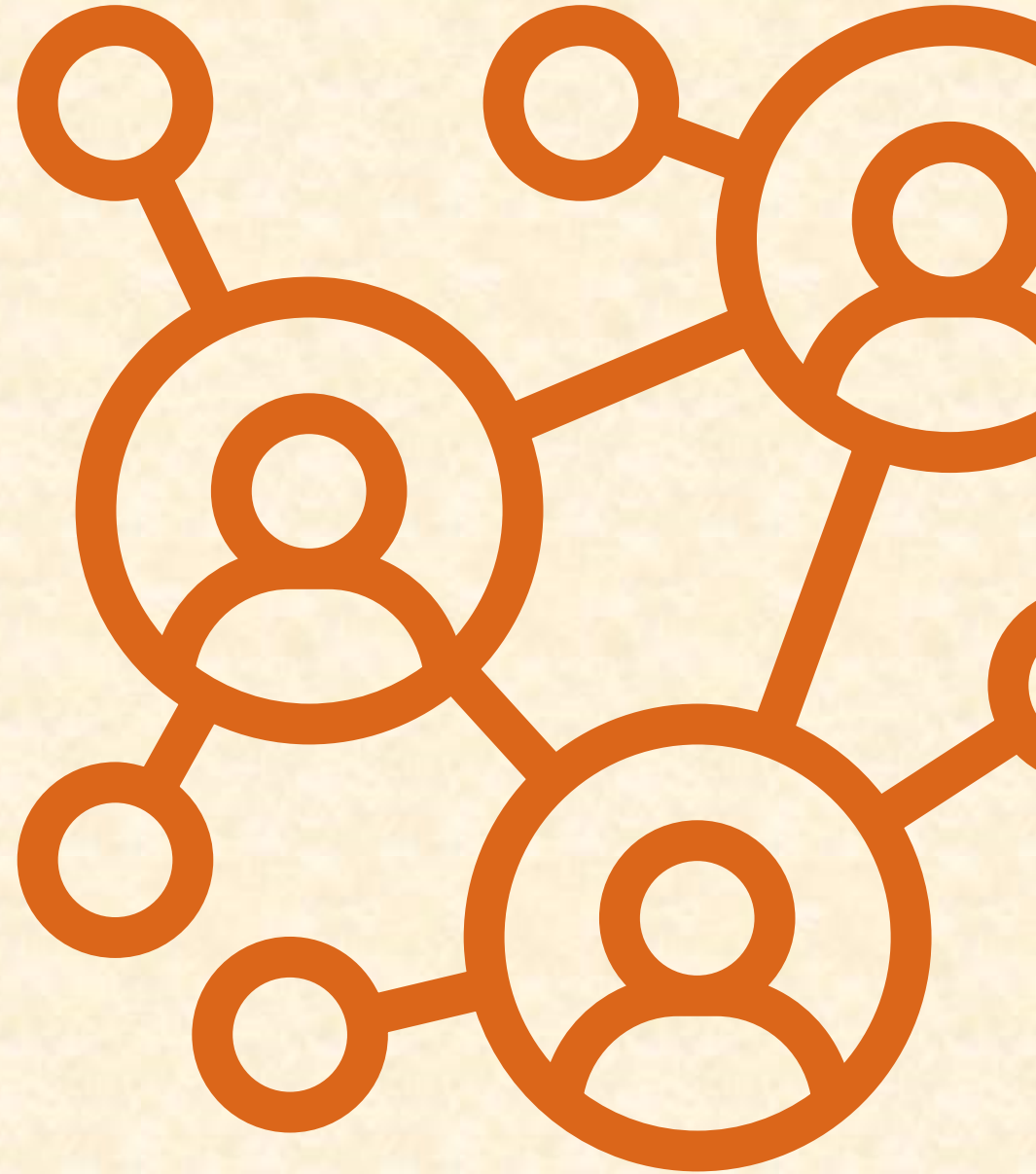
Missing Financial Code Information?

On the IROC Incident Record:

The Billing Organization and Subdivision will show the Owning Agency of the Incident to help troubleshoot missing Financial Codes – contact the Dispatch Center to help.

Module #7

ORDM Process in Portal



Incidents ORDM: Expectations, Agenda, and Outcomes

Training Session

Expectations

- Understand how the Ordering Manager role is assigned
- Understand how to process orders using the ICLIP Portal

Agenda

- Introduction
- Requesting ICLIP ORDM access
- Working in the ICLIP Portal

Outcomes

At the end of this section, you should be able to:

- Assist Ordering Managers with new access requests when changing incidents/dispatch organizations

ICLIP Ordering Portal

The screenshot shows the IROC browser sidebar menu. At the top, there are tabs for 'All', 'Favorites', and 'History'. Below these is a search bar containing the text 'portal'. Underneath the search bar, there are sections for 'FAVORITES' (showing 'No Results') and 'ALL RESULTS'. The 'ALL RESULTS' section lists several items: 'IROC Home', 'ICLIP' (with a star icon), 'ICLIP Portal' (with a star icon and underlined), and 'Ideas'.

The screenshot shows the ICLIP website homepage. The header features the ICLIP logo, the text 'Interagency Cache Logistics Inventory Program', the time '04:27', and the location 'America/Los_Angeles Thursday, April 16th 2026'. There are links for 'Home' and 'Re'. The main content area has a large background image of a mountain landscape with a lake and a tent. The text 'How can we help?' is overlaid on the image. Below the image is a search bar with the text 'Search'. At the bottom, there is a section titled 'Incident Order' with a tree icon and the text 'Ordering Manager request'.

The screenshot shows the ICLIP Incident Order form. The header includes the ICLIP logo, 'Interagency Cache Logistics Inventory Program', the time '04:27', and the location 'America/Los_Angeles Thursday, April 16th 2026'. There are links for 'Home' and 'Requests'. The main content area is titled 'Incident Order' and contains several form fields: 'Dispatch organization', 'Incident', 'Cost Center', 'Cache', 'Request Block', and 'Ordering Team'. A 'Submit' button is located at the top right. On the right side, there is a 'Required information' section with a list of items: 'Contact Name', 'Contact Phone', 'Needed by Date', 'Needed by Time: AM', and 'Needed by Time: Zone'.

ICLIP Ordering Portal – Order Status

How can we help?

Search

Incident Order
Ordering Manager request for Cache Items

Knowledge Base
Browse and search for articles, rate or submit feedback

Incident Orders for Missoula Interagency Dispatch Center

Incident Order	Incident	Incident Number	Filling Cache	Needed By Date	Total Cost	Status	Created
ORD0011181	Bachelor Creek (MT-LNF-250071)	2025-MTLNF-250071	CORMK - Rocky Mountain Area Incident Support Cache	04-18-2026	\$53.40	Shipped	04-18-2026 15:51:40
ORD0011156	Kershaw (MT-SWS-260048)	2026-MTSWS-260048	MTNRK - Northern Rockies Area Incident Support Cache	03-31-2026	\$1,558.51	Shipped	03-30-2026 16:21:45

Order Status can be seen on the Home screen in the ICLIP Portal once the Order is submitted

ICLIP Ordering Portal – Requested Item Status

14:23 | America/Los_Angeles
Tuesday, April 21st 2026

Home | Requests

Home > Requests

My Requests

View: Open requests | Search open requests

Request	State	Updated
3 requested items REQ0021878 ICLIP Ordering Manager AKK	Open	Submitted :04-21-2026 14:23:26 Request Number : REQ0021878 Estimated Delivery : 04-21-2026

Item	Delivery Date	Stage	Price (each)	Quantity	Total
001239 - HOSE - SYNTHETIC, LINED, 1 1/2" NH X 100'	04-21-2026	<input checked="" type="radio"/> Awaiting Approval (Completed) <input type="radio"/> Awaiting pick (In progress) <input type="radio"/> Pick complete (Pending - has not started) <input type="radio"/> Completed (Pending - has not started)	\$239.17	50	\$11,958.50
000030 - BATTERY - SIZE AA, 1.5 VOLT, PENLIGHT	04-21-2026	<input type="radio"/> Awaiting pick			
001238 - HOSE - SYNTHETIC, LINED, 1" NPSH X 100'	04-21-2026	<input type="radio"/> Awaiting pick			

Total: \$21,528.52

Awaiting Approval
Request has been submitted to the Cache

Awaiting Pick
Cache has confirmed the order and items are being picked

Pick Complete
Item pick tasks have been closed

Completed
Order has been completed and items will be shipped to the Incident

Ordering Managers can check item status by going to Requests and expanding the item list from the REQ submitted

All items will list the current stage of completion in real time as the Cache is processing the order

Module #8

ICLIP Reports

Billing Information
Existing ICBS Reports
Custom Lists



Reports: Expectations, Agenda, and Outcomes

Training Session

Expectations

- Understand prepopulated reports
- Review how to manage reports
- Under how to use the Billing Information report

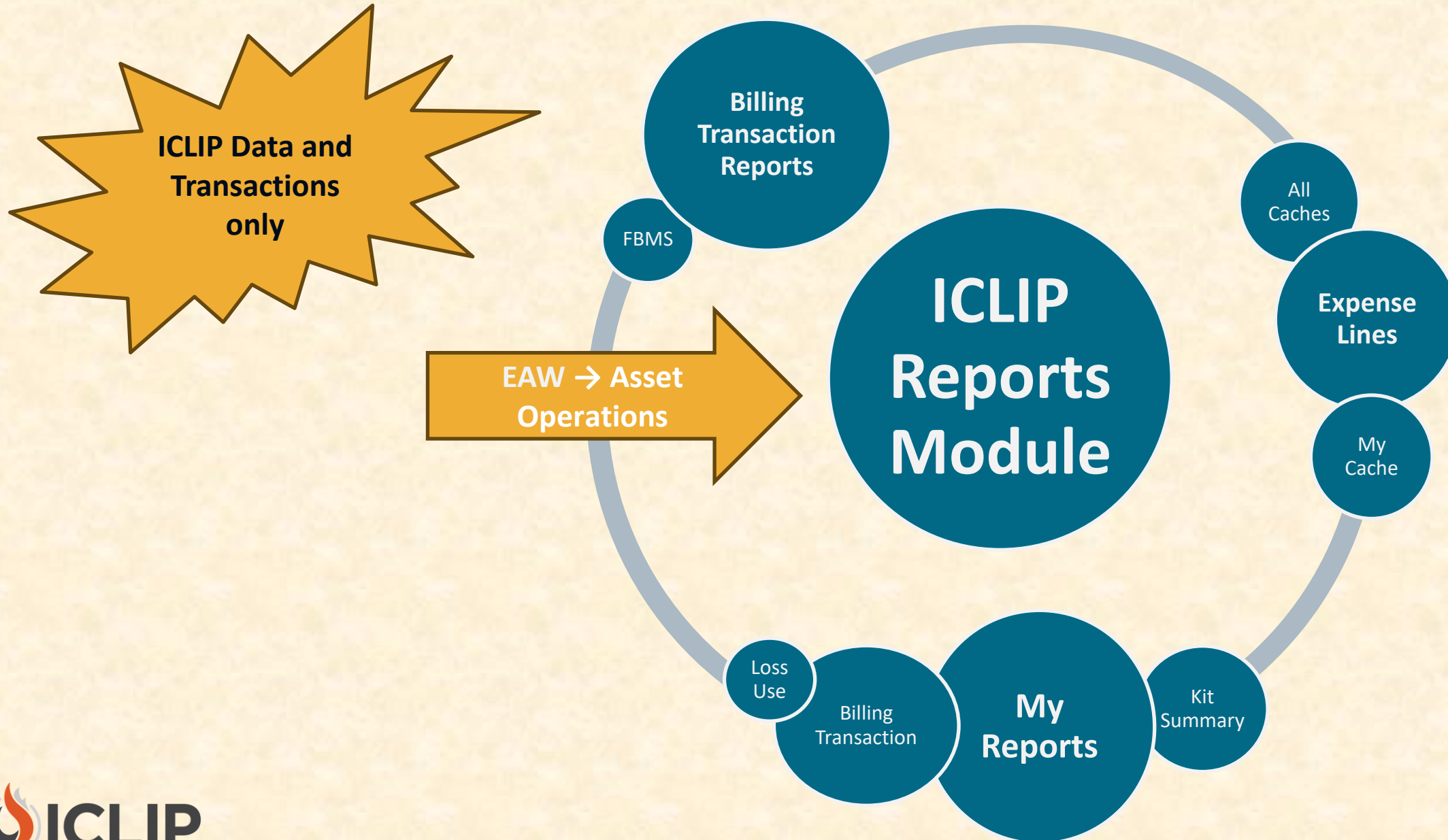
Agenda

- Billing Information
- Custom Lists
 - Incident – Owning Cache
 - Editing, Renaming, and Deleting Lists

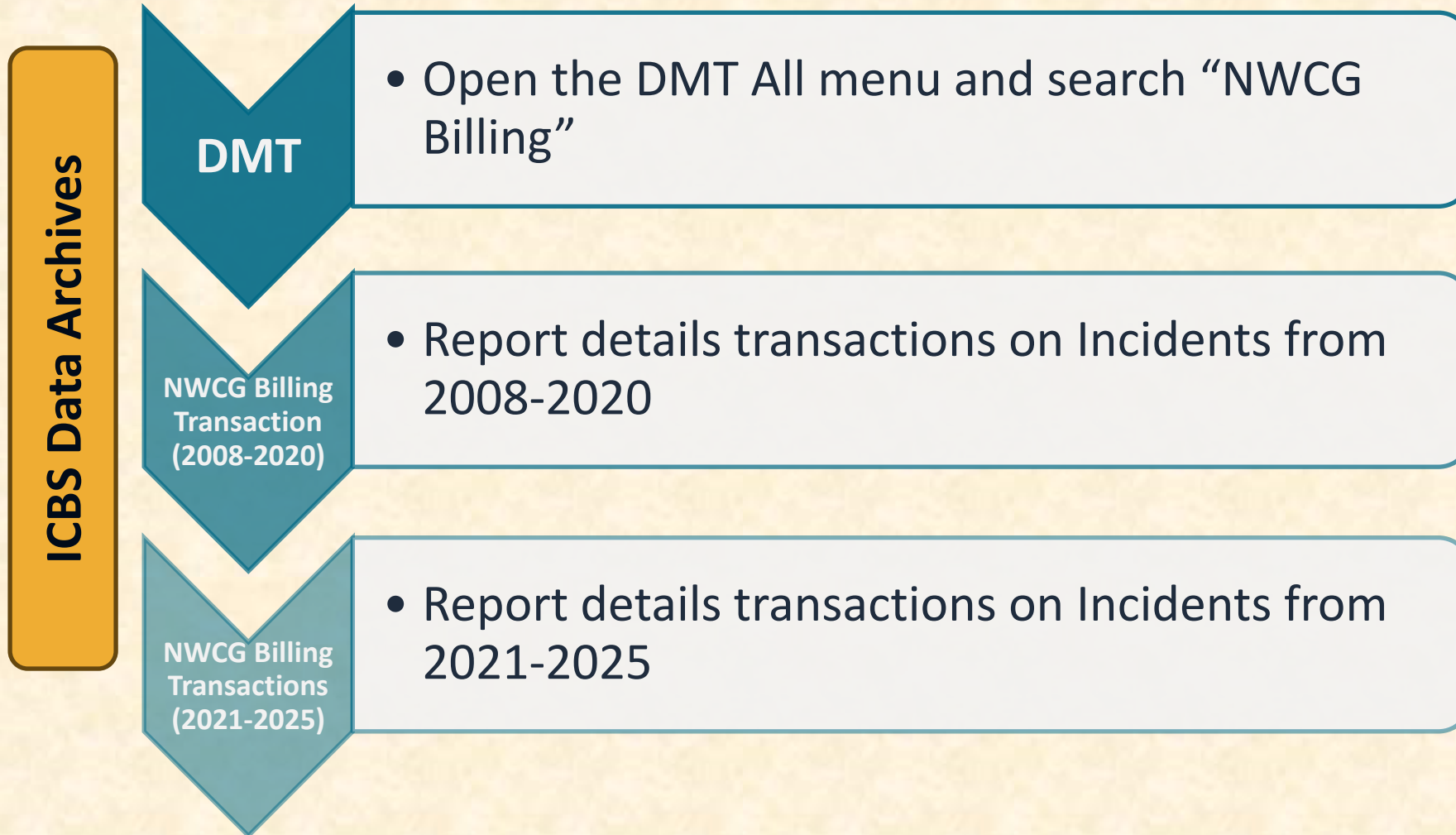
Outcomes

- Track inventory levels for ordering purposes
- Report on outstanding inventory for incidents and other orders
- Build custom lists for internal reports

ICLIP Reports: Where do I find and run reports?



ICLIP Reports: Where do I find Archived ICBS Data?



Tip:
These reports contain tons of data – filter down as much as possible *first* before trying to export

ICLIP Reports: *NEW* Billing Information Report

Information and Sorting:

Displays all Issue and Return transactions for specific Incidents/Other Orders

Can be sorted by Transaction Type or Transaction Date

Can be ran for a specific date range

Can be ran Enterprise or for a specific Cache

Recommended Use:

Use this report for Incident Business Review

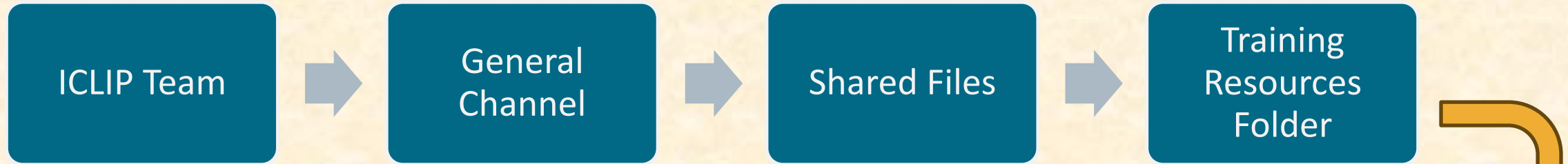
Loss Use Summary Report can be used as a supplementary document

Tip:

Select the year of the Incident when running the report

ICLIP Reports: Existing Reports and Lists

Microsoft Teams



Existing Reports and Lists Spreadsheet

- Details numerous ICBS Reports and their descriptions
- Explains where to find the information in ICLIP
- Lists columns and filters for creating custom lists

ICLIP Reports: Custom Lists

The screenshot shows the ICLIP Enterprise Asset Workspace interface. The top navigation bar includes 'IROC', 'All', 'Favorites', 'History', and 'Enterprise Asset Workspace'. The left sidebar contains a menu with 'Asset operations' expanded, showing 'Lists' and 'My Lists' (highlighted with a red box). Below 'My Lists', there are several categories: 'ICLIP' (with 'My Caches' selected), 'Inventory Items', 'ICLIP Orders', and 'ICLIP Reports'. A red box highlights the 'My Caches' item. The main content area displays 'ICLIP - My Caches' with a notification 'Last refreshed just now.' and a list of unit IDs, each with a checkbox and a refresh icon. The unit IDs are: AKAKK, AZPFK, CALSK, CANCK, CORMK, IDCDK, IDFCCK, IDGBK, IDRWK, KYSAK, MNNEK, MTBFBK, MTNRK, NISCC, NMSFK, ORLGK, ORNWK, and WAWFK. A red box highlights the 'My Caches' item in the sidebar.

Creating, Editing, and Deleting

Incident List Missing "Owning Cache"

Kit Component List

Hands On Practice1 Module #8

Creating Lists

In Production

Users create Custom
Lists:

Incident List – Missing Owning Cache

Start from existing > Incident List
Edit Columns and Filters
Save your new Custom List!

ICLIP Reports: Custom Lists – Columns and Filters

Incident List Columns and Filters

Incident List - Missing Owning Cache
Columns:
Name
IROC Incident
IROC Incident > Year
Owning Cache
IROC Incident > Default Cache
Expense Line Total
Cost Center
Tags (optional)
Created

Open
“Advanced
View” on the
filter panel to
easily edit

Advanced view

Conditions Sort by

Show labels

Saved filters

Field Operator Value
Expense line total is not \$0.00 or **and**

Field Operator
Owning cache is empty or and

Add condition set

Cancel Update

Tip:
Save the list after applying filters
– this keeps the filters on
anytime you revisit the list

Setting the Expense
line total to +/- \$0.00
will only display
Incidents with existing
transactions

Hands On Practice 2 Module #8

Creating Lists

In Production

Users create Custom
Lists:

Kit Contents

Create your own > Model
Components

Edit Columns

Search and Filter by Component or
Bundle

ICLIP Reports: Custom Lists - Columns and Filters

Kit Contents Columns and Filters

Tip:
Bundle = Kit



Kit Contents
Columns:
Component
Quantity
Component > Unit of measure
Component > Cost
Bundle



Filter by Component to see kits containing a specific item

OR

Filter by Bundle to see items in a specific kit

Tip:
Users can rename or delete a custom list from the “settings” icon on the list

Module #9

ICLIP on the iPad



ICLIP on the iPads: Expectations, Agenda, and Outcomes

Training Session

Expectations

- Understand how to setup iPads and ICLIP on the iPads
- Understand how to access ICLIP on the iPad
- Understand how to perform functions in ICLIP on the iPads

Agenda

- Establish how to use ICLIP on the iPads
- Open discussion on how each Cache uses the iPads

Outcomes

- At the end of this training, you should be able to:
- Utilize ICLIP on the iPads and perform functions and tasks such as completing pick/put away tasks.

Introduction: Using ICLIP on an iPad

To access ICLIP on the iPad follow the same steps you would on the desktop. Open Chrome and navigate to FAMAuth and log in with your login.gov account.

Tip: You may need to swipe between pages on the iPad homepage to find the Chrome application.

Users will have to switch the browser to desktop mode after signing in for ICLIP to work properly.

Tip: This only needs to be done the first time the user is signing in.

Tips and Tricks: Using ICIP on an iPad

Manager configuration of device before use:

- Removing apps
- Locking/password protecting folders and apps
- General pre-use set up

Best to use for:

- Pulling orders
- Closing tasks
- Item put aways

Monthly Requirement - Assign an individual for the following tasks:

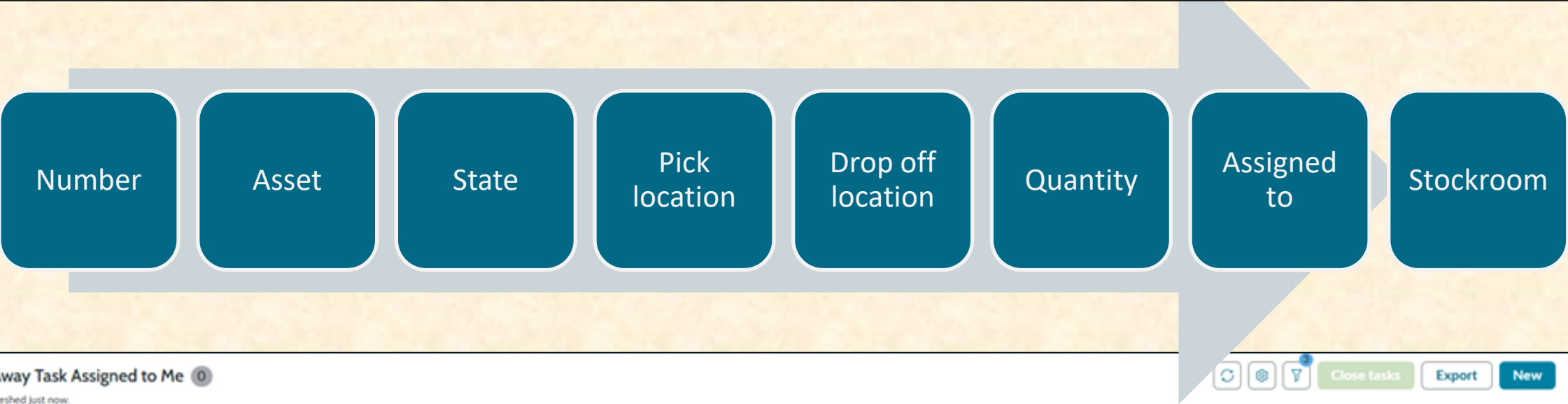
- Run iOS System Updates
 - **Note:** Ensure the device is plugged into power for required updates
- Check CIO Emails

Optimizing Column View for iPhone and iPad: Pick/Put Away Tasks

Pick Task Assigned to Me 0
Last refreshed 2m ago.

Number Asset State ▾ Pick location Drop off location Quantity Assigned to ▾ ▾ Stockroom

Close tasks Export New



Put Away Task Assigned to Me 0
Last refreshed just now.

Number Asset State ▾ Pick location Drop off location Quantity Assigned to ▾ ▾ Stockroom

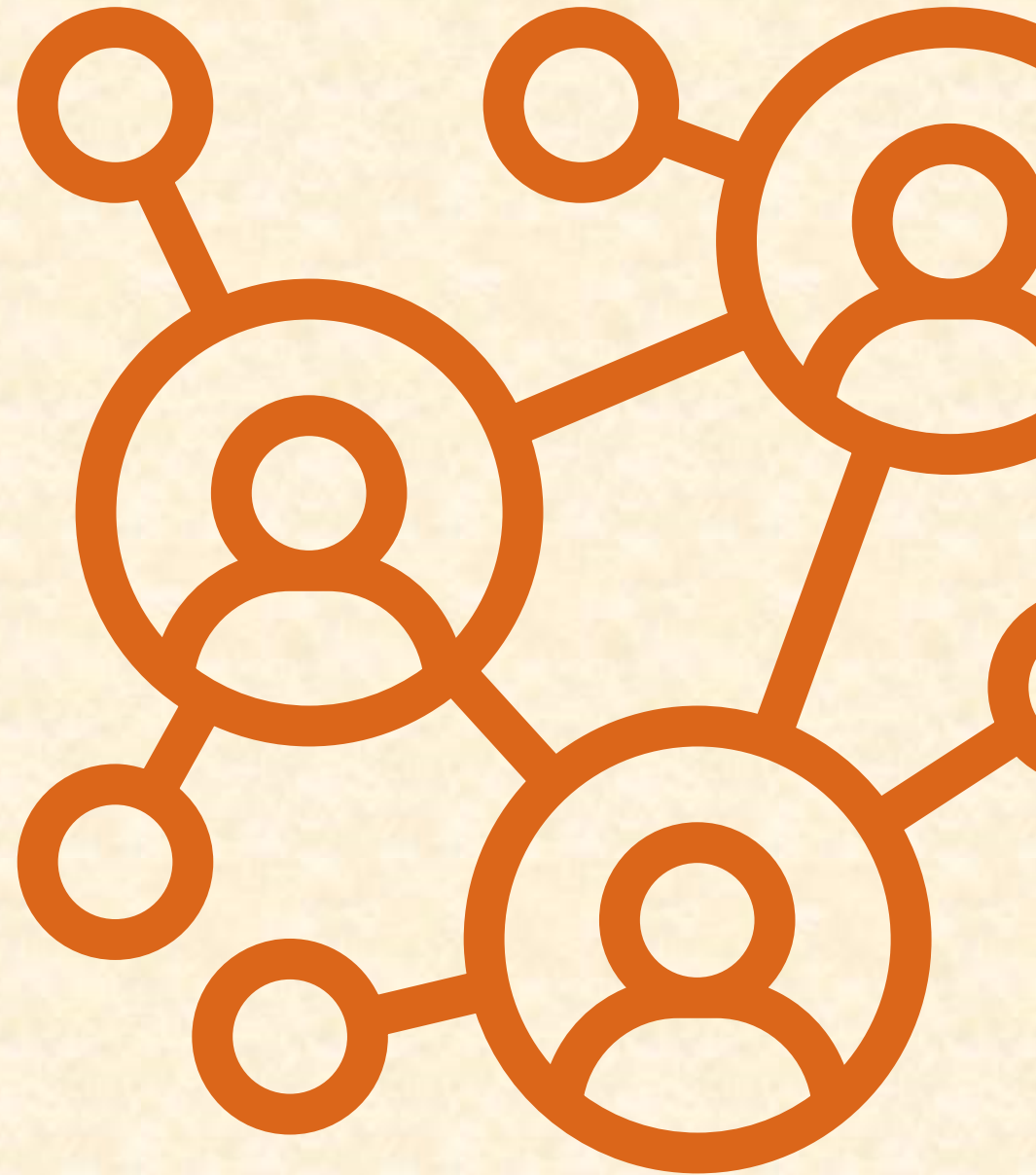
Close tasks Export New

Pro-tip: Organize columns on your desktop for a smoother experience. Your saved layout will automatically be available on the iPad.



Module #10

Resources



Resources: Day 1 – Stockroom Management

KBA

- [Managing Your Cache Stockroom's Record](#)
- [Creating a New Cache Location \(Aisle and Space\) and Item Dedication](#)
- [Managing Trackable Assets](#)
- [Managing Non-Trackable Assets](#)
- [Searching for Inventory Quantity and Locations](#)
- [Printing Labels](#)
- [Adjusting Inventory from a Zero Quantity](#)
- [Managing Quantities for Consumable Assets](#)
- [Creating an Ad-Hoc Move Task](#)

Resources: Day 2 - User Security, PO's, & Disposals

KBA

- [Managing Users and Groups](#)
- [Managing Purchase Orders](#)
- [Managing Pick and Put Away Tasks](#)
- [Managing Vendors](#)
- [Managing Variance Approvals](#)
- [Managing Trackable Disposal Orders](#)
- [AD-112 – Report of UNS, Lost, Stolen, Damaged, or Destroyed Property](#)

Resources: Day 3 - Incidents & Cost Centers & ORDM Access

KBA

- [Managing Cost Centers](#)
- [Troubleshooting Changing Charge Codes for ICLIP Incidents](#)
- [Managing Loss Use Reports](#)
- [Managing FBMS Reports](#)
- [Accessing IROC](#)
- [Submitting and Tracking a New Ordering Manager Access Request](#)
- [Managing Organization Access Roles](#)
- [Submitting Incident Orders](#)

Resources: Day 4 – Reports, Custom Lists, & Using ICLIP on the iPad

KBA

- [Using the Enterprise Stock Status Report](#)
- [Managing Loss/Use Summary Reports](#)
- [Managing “My Lists” and Custom Reports](#)
- [Managing FBMS Reports](#)
- [Managing Kit Summary Reports](#)
- [Managing Billing Information Reports](#)
- [Accessing the Desktop Site for ICLIP on the iPad](#)