

Interagency Cache Business System

Implementation Plan



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Overview

Document Purpose

The purpose of this plan is to outline the implementation strategy and specific activities necessary to ensure successful deployment of the re-engineered Interagency Cache Business System (ICBS). This is intended to be a working document which will be updated continuously in order to serve as a useful reference to project and cache personnel.

Several appendices provide detailed reference materials and templates useful to the ICBS-R Team, its contractors and cache personnel.

Project Summary

As stated in the ICBS-R Charter dated March 5, 2003, the Project will deliver a system that provides automated support to interagency and agency National and Local Area Support Caches. The re-engineered ICBS will be a complete business system that enables the cache system to process issues, returns, incoming inventory, and to track inventory in real time on or off premises through the use of AIT (Automated ID Technology) such as bar code scanning. ICBS-R is chartered by the NWCG and co-sponsored by the Forest Service, Bureau of Land Management, and the National Interagency Support Cache (NISC) Managers.

The re-engineered ICBS is based on a commercial-off-the-shelf (COTS) warehouse/supply chain management software product called Sterling WMS (Warehouse Management Software), which was formerly called "Yantra." A contracted ICBS-R project team (part of the Sterling Commerce Corporation) is working with cache subject matter experts (SMEs) on the design, customization, implementation and support of the re-engineered ICBS.

Purpose/Business Need

The purpose of this plan is to identify the implementation details for the re-engineered ICBS application. Implementation is defined as a process or transition period from the current ICBS system (or other existing systems) to the use of the new ICBS system. Implementation includes several preparation, data migration and input, training, coaching, practicing and monitoring activities.

The business need for the ICBS project has been identified as:

- Leading to improved agency-reporting
- Better inventory accuracy and information sharing
- Elimination of many manual cache processes
- Improved efficiency in inventory deliverables
- Improved management of wildland fire/all risk costs.

Success Factors

Prior to selecting a technical approach for the re-engineered system, the ICBS-R Team defined objective performance measures with which to gauge how successful the new system will have been in terms of greater cache efficiency. The National Cache Managers (and the managers of five selected Local Area Caches) were asked to collect data on performing selected cache processes using the current technology (e.g. time, effort, accuracy, etc.). This data will be used to establish a baseline against which we will be able to quantify future improvements upon implementation of ICBS-R.

Pre-ICBS-R baseline data was collected on the following cache processes: Receipts and Receipt Input, Returns and Return Input, Physical Inventory and Inventory Input, Fire Loss Reporting, and Issue Input. Once the system has been fully implemented, increases in process efficiency will be calculated from the “before and after” performance measures data. Beyond these objective measurements, the new system will be considered generally successful if the following subjective factors have been met:

1. Users have a high level of confidence in the system and the new system enjoys a high level of user acceptance
2. System is relatively free of glitches and programming errors, and requires few user “workarounds”
3. More standardization throughout the cache system results in a greater ability to share scarce cache personnel as high activity levels shift from one cache to another
4. Centralized cache data results in less redundant data entry (e.g. organizations, customers, suppliers, etc.)
5. Real-time inventory information is readily available to system users – primarily due to the use of Automated Identification Technology (AIT)
6. Authorized users can view and/or manage the system-wide inventory for more efficient inventory utilization across the system. This results in a more efficient inventory distribution for better service to incidents
7. The system-wide National and Local Area Cache inventory (i.e. inbound, outbound, returns, receipts, issues, kit buildup, refurbishment, etc.) is much more visible and manageable. This reduces instances of over-ordering replacement stock and enables the cache system to provide the same level of incident support with less inventory
8. Trackable items are more visible to users, which increases the accountability of sensitive and/or agency property items
9. Users have an innovative and pertinent training program and materials that meet their needs
10. A responsive user support organization (Helpdesk) that understands the system and user needs is in place
11. With Caches using a single NWCG-supported system, agency system support costs are minimized
12. More efficient interaction with dispatch centers due to a ROSS-ICBS interface results in less redundant data entry, fewer transcription errors and faster processing of resource orders and cache issues
13. Interface with an NWCG Organization Information System (OIS) reduces redundant organization data entry in numerous NWCG systems

Application Demonstration and Testing

A cache demonstration project for the new ICBS was held at the Rocky Mountain Cache at the Denver Federal Center in Lakewood, Colorado in April, 2006. Although this was solely a demonstration project, it was also an opportunity to test various aspects of the ICBS system, and consisted of the IBCS alpha test. This was an opportunity for ICBS users to gain some knowledge and understanding of the new system, and to likewise test certain performance aspects of the ICBS program.

Following the demonstration, additional unit/string testing of the system was performed by the contracted Sterling Team, and the application was further configured to perform better in support of NWCG cache operations.

User beta testing of the new ICBS was begun in January 2007. This is still underway, and is made up of three distinct phases: Use of ICBS High Volume Template without AIT; Use of ICBS High Volume Template with AIT; and Use of Low Volume Template with/without AIT. At this time, the team is working through the first two phases of this testing, which entail double-blind testing of over three hundred test cases. Throughout the beta test, the Sterling Team is monitoring the results and is making modifications to the system as necessary.

Due to network issues at the designated Low Volume Cache (Las Vegas Local Area Support Cache), a decision was made in late 2007 to complete all high volume template testing and move directly into implementation at the National Caches, prior to testing the low volume template. The team will complete that testing as the implementation schedule allows, but before deploying the system to the general Local Area Support Cache (LASC) community.

Roles and Responsibilities

1. ICBS-R Project Team. The ICBS-R team is made up of a variety of positions. While all team members will be involved in the process, the Implementation Team Leader has the overall responsibility for coordinating system deployment to the user community – including delivering training in the new system.
2. National and Local Area Support Cache (LASC) Managers. The National and LASC managers are an integral part of the ICBS implementation process. They will be involved in the decisions for implementation timing and locations.
3. ICBS Helpdesk. This is primary focal point for delivering ICBS user support.
 - a. The ICBS-R Project uses a single interagency Helpdesk that supports other mission-critical incident-support systems such as ROSS, DMS and I-Suite.
 - b. ICBS training is delivered to key individuals in the Helpdesk organization, who then train and help coach other Helpdesk personnel on ICBS.
 - c. ICBS-R Team SMEs assist Helpdesk personnel onsite during initial system implementation and key system upgrades as necessary.

- d. The Sterling “eLearning” tool and ICBS quick reference guides (QRGs) are available to Helpdesk personnel as training/learning tools.
 - e. Symbol/Motorola and Sterling Mobile Applications Scan gun User’s Guides and other reference materials are available for Helpdesk personnel.
4. Lead Instructors. These roles are discussed in this document under the Training section. Specific training involves a select group of cache employees, who function as lead instructors. These individuals in turn coach other cache personnel when they are going through their respective modules of the eLearning tool.
5. Operational Users:
- a. System privileges/user roles are developed for ICBS, tailored to logical current and projected cache position functions. Each cache manager assigns the user roles for their staff members prior to system training.
 - b. In addition to cache level roles, NWCG enterprise-level roles are created to administer system-wide data, configuration, role types, etc. A limited number of users are authorized and trained in how to perform these roles.
 - c. The eLearning tool encompasses interactive training modules for:
 - i. Warehouse user group
 - ii. Cache Administrator user group
 - iii. Warehouse Leader user group
 - iv. etc.
 - d. User groups are set at the Enterprise (NWCG) level and are be used by all caches.
 - e. “LDAP” User IDs, required to access the NITC-based application, are requested by Cache System/Account Administrators via the ICBS Helpdesk
 - f. Application User ID’s are created and managed at each cache.
 - g. Each user ID must be unique and associated with at least one User Group.
 - h. The course segments are available to all users with sections being assigned based on the position a person has in the cache.

ICBS Configurations

The Sterling-based ICBS will be deployed in at least two different configurations, depending on the type of facility in which the application will be used:

1. National Caches and larger Local Area Support Caches with a high business volume will use the “High Volume” ICBS template. The Sterling system incorporates Automated ID Technology (AIT) consisting of bar code scanning for most cache processes.

The High Volume Template is based on a hybrid AIT/non-AIT version of Sterling. This means it will support data input for warehouse processes in either way, but use of AIT will result in greater efficiency. The project team assumes that all National

and Satellite Cache locations, as well as the largest LASCs, will use the high volume template in conjunction with AIT.

2. Smaller lower business volume caches, which include most of the Local Area Support Caches, will use the “Low Volume” template, based on a scaled down version of Sterling.

At this time, it’s not known whether or not AIT technology is a viable option at these facilities. AIT will be tested at a low volume cache, so that a determination can be made as to whether or not the cost/benefit justifies the use of AIT at these caches.

System-wide Pre-Conditions for Implementation

The following pre-conditions must be met in order for ICBS to be approved for production use on a system-wide basis:

1. Application Beta testing has been completed and application functionality is acceptable.
2. The production version of the application and all supporting applications/services have been installed and tested at the National Information Technology Center (NITC). A service level agreement (SLA) is in place between the ICBS-R lead agency and NITC.
3. The application has received agency certification and accreditation (C&A). The application has been granted interim (Interim Authority to Proceed - IATO) or final approval for production use.
4. Network and back-up connectivity performance has been verified (i.e. users on various networks can access ICBS; users can successfully send printing jobs to networked printers; and back-up agency dial-up access to ICBS has been tested).
5. All significant technical application issues have been addressed.
6. System-wide data (e.g. caches, customers, NFES catalog, price list, carrier server information, zones, configurations, user roles, etc.) have been loaded/configured in the new system.
7. Any system-wide duplicate data issues (e.g. national/local catalog items, suppliers, customer/organizations, etc.) have been resolved.
8. User training materials (e.g. eLearning, PowerPoint presentations and associated labs, Quick reference guides, etc.) have been developed and tested.
9. SMEs, Lead Instructors, Coaches and other supporting staff have been trained and are available to assist caches in the implementation process.
10. A trained user support Helpdesk is in place to support the re-engineered system during implementation.
 - Helpdesk will have access to Sterling ELearning and other reference materials
 - Current ROSS helpdesk metrics will be applied to ROSS/ICBS helpdesk to ensure prompt service on helpdesk calls.

- Helpdesk metrics include helpdesk performance values that must be met and that are periodically reviewed by a designated agency individual or team of agency personnel.
 - Helpdesk personnel will be trained in Symbol scanning gun use and basic trouble-shooting.
11. Symbol scanning device support is in place. This may be provided by a Symbol depot or a third party provider, and supplies users with:
- Trouble shooting and diagnostics
 - Device repair and replacement
12. WLAN support is in place for all caches where wireless AIT will be used. This may be provided by agency or a third party provider.
13. An application operations and maintenance (O&M) organization is in place to perform ongoing system maintenance and upgrade work, and to configure and test future releases of the Sterling software with the NWCG modifications.
14. An effective change control board (CCB), appointed by the National and Local Area Support Cache Managers, and is in place to manage system change requests.
15. Project stakeholders are in agreement that the application and overall system is ready for production.

Cache Pre-Conditions for Implementation

The following pre-conditions must be met in order for ICBS to be implemented at any given cache:

1. Cache Implementation Readiness Checklist has been completed. This is provided to each cache being implemented
2. Required hardware, software and wireless infrastructure (as appropriate) are in place and tested (e.g. PC configuration, network access, dial-up modems, networked laser and label printers, shipping scales, wireless scanning devices connected to WLAN and wireless coverage tested at all work areas, etc.).
1. A cache-specific COOP/ Business Resumption Plan, taking into consideration any differences in host agency requirements, has been completed.
2. Warehouse zones and locations have been identified and labeled, and any reconfiguration of the inventory to maximize efficient warehouse operations has been completed.
3. The entire inventory of the cache to be implemented has been labeled with new bar-coded labels produced by the new ICBS (NOTE: at larger caches, it's sometimes not feasible to label the *entire* inventory prior to conducting training. If so, it's completed in conjunction with a physical inventory during "go live" activities at the end of training)

4. Cache-specific data (e.g. warehouse locations and layout, warehouse devices and equipment, receiving preferences, packing strategy, retrieval strategy, put-away strategy, user profiles, etc.) have been loaded/configured in the new system.
5. A complete physical inventory has been performed, all discrepancies have been resolved, and this information has been entered into the standardized “Locations Inventory Spreadsheet” , to be loaded into the system.
6. All users have been given ICBS training in the use of the system and/or bar code scanning devices as appropriate to their user roles, have practiced using the system, and are available to assist with implementation.
7. Users have been instructed in how to obtain application user help, network trouble-shooting, and AIT device/WLAN trouble-shooting and support.
8. Some caches have unique requirements that need to be met before they can implement the new ICBS. For example, the Great Basin and Alaska Interagency Caches require BLM stores account reporting functionality to be in place before they transition from their legacy systems to the new ICBS.

Cache Wireless Infrastructure

1. Implementing the Sterling-based ICBS will result in increased cache process efficiency, enhanced real-time inventory visibility across the interagency support cache system, and reduced inventory costs. To achieve the maximum benefit, National Caches and high-volume LASCs will use wireless bar code scanners to input most inventory transactions (e.g. picking, put-away, returns, receipts, item movements, kit building, physical inventory, etc). Note: an AIT-enabled returns process is currently under development (summer 2010).
2. Smaller scale LASCs may implement wireless bar code scanners, but on a smaller scale. As part of the testing and implementation process, the project plans to test wireless AIT in conjunction with the ICBS application at a low volume LASC when the cache implementation schedule permits. This should help determine the feasibility and benefit – if any – of using wireless AIT in the smaller caches.
3. In order to use the AIT component of the ICBS application, a wireless local area network (WLAN), connected with an agency network, will be required at each cache that will use wireless bar code scanners. To increase user acceptance and reduce the impact of the transition to the new ICBS, the project implements wireless AIT at the same time it implements ICBS in the larger/high volume caches. In other words, the project does first implement a non-AIT version of ICBS at a cache, and then introduce an AIT version at a later date.
4. The ICBS-R Project obtained technical approval from the Forest Service for the purchase and installation of scanning devices and WLANs. ICBS-R obtained funding from the Forest Service to mostly outfit the National Caches and larger Local Area Support Caches with scanning devices, WLANs and label printers. This equipment is distributed and installed at caches based on need and without regard to which agency hosts the cache as part of the implementation preparation process.

5. The project received technical approval from the BLM for wireless technology to be used at a limited number of BLM facilities. Once it's been demonstrated and tested at one or two BLM caches, the project expects to receive approval from the BLM to implement at the remaining cache sites.
6. Many state-hosted caches are also served by a Forest Service agency network. Wherever possible, ICBS-R plans to use a Forest Service network at these sites to connect cache WLANs to the NITC-hosted ICBS servers. Connecting WLANs to agency networks in state-hosted facilities may require technical approval from the host agencies.
7. Design and installation of WLANs at caches without an FS network (i.e. those that would rely on the public internet to connect to the NITC-hosted ICBS) will be scheduled after implementation of the other caches. This is because several technical design issues will first need to be resolved before WLANs can be designed and connected to NITC.
8. The project will work with the ICBS-R Steering Group to help determine priorities for wireless implementation and to identify any funding gaps.
9. The following are the high level steps to be completed at each cache prior to implementing the AIT component of ICBS.
 - a. Complete wireless site survey documentation to meet the requirements of USDA Forest Service Manual 6600, Chapter 6640. This work is expected to be performed by trained agency personnel and will include the following items:
 - i. Cache diagram indicating interior and exterior work areas where wireless coverage is required (i.e. where AIT is to be used)
 - ii. Cache diagram showing the location, makes, models and specifications of current network equipment
 - iii. Documentation (textually and graphically) showing wireless survey information and recommended WLAN equipment
 - iv. Documentation of potential risks to successful wireless operation.
 - b. Deliver, install and test WLAN equipment at the cache facility.
 - c. Connect WLAN to agency network and test functionality.
 - d. Configure and install Symbol MC9090G portable computer devices (wireless bar code scanners) to the WLAN.
 - e. Using the new ICBS application, test Symbol scanners in actual warehouse conditions and in cache AIT work areas.
 - f. Provide users with basic instruction in the use of Symbol scanners (please see "Training" section of this document)
10. Wireless site surveys and WLAN installation occur on a somewhat independent track from ICBS implementation at National Caches and LASCs, but WLANs must be in

place and tested at any cache (that will implement the AIT-version of ICBS) prior to implementation.

11. The ICBS-R wireless team first focused its efforts on installing WLANs at those caches that will be involved in AIT beta testing, and where wireless site surveys had previously been developed.
12. After this initial WLAN work, the team developed site surveys and installed WLANs at sites in an order that made the most sense from a logistical and technical standpoint, with emphasis on preparing all the National and Satellite Cache facilities as soon as practical.

Implementation Strategy

The following are the key concepts in the ICBS implementation strategy. See Appendix G for a list of tasks that will need to be performed at each cache.

1. As a general rule, bring all National Caches on board first. These are the caches that process the highest volume of business. The interagency cache system will realize the most benefit from the new application by implementing these caches first. Also, bringing all National Caches online first will allow them to begin sharing information with each other as they currently do.
2. Following National Cache implementation, bring the LASCs online. Trained users in the National Caches can assist a Lead Instructor in training the new LASC users.
3. National Caches and the largest volume Local Area Support Caches (LASCs) will utilize wireless bar code scanning. Approved WLANs need to be in place prior to implementing these caches, in order for users to take advantage of AIT. This will avoid the expense and training curve of having to implement a cache in a wireless mode, and then return to that cache a second time to implement AIT.
4. Implementation by Geographic Area as determined by incident activity level. A low level of incident activity is desirable during implementation so that users can begin performing their jobs using the new system immediately after training. Implementation won't be practical at caches in Preparedness Level 4 or above, because personnel will not have time to perform their job and make the transition to the new system.

If incident activity is too high for implementation in many areas, the ICBS-R Team can consider bringing on LASCs in previously implemented Geographic Areas. Because of the logistics involved for trainers and project staff, any priority Alaska LASCs may be targeted for implementation immediately following implementation of the Alaska Interagency Cache (AKK).

5. A "pre-implementation" team of project personnel precedes the actual implementation team to advise and assist each cache in setting up locations, and instructing the staff on cache-specific system and data preparation, and checking and trouble-shooting infrastructure issues (e.g. WLANs, scan guns, networked printers, PCs, etc.). This pre-implementation visit generally precedes the actual ICBS training

by one to two weeks, and may include a member of the Sterling project team to offer technical assistance.

6. The cut-over from the legacy system to the new ICBS follows this general pattern: entering data in parallel in two systems is not feasible. Any existing transactions in the current system will be completed in that system. Any new transactions are entered in the new system.
7. Some legacy system data will need to be accessible to users after the new system is implemented. The project recommends that legacy ICBS data be migrated to the new Fire and Aviation Management (FAM) Data Warehouse for storage and retrieval by users, and has worked with the FS IRM group to migrate this data to a “holding site” at NITC. Once the Data Warehouse is stood up and the data is loaded, users will be able to use the Cognos reporting tool to produce reports on this historical data (from 1999-2010). A monumental data clean-up effort would be required to rationalize data from the 13 legacy ICBS databases and the database in the new ICBS so that reports could be run on both sets of data. This is not feasible or economically viable.
8. Identify what legacy system data will be migrated; what data should be purged or retained in some manner; and what data will need to be entered in ICBS:
 - a. Generally speaking, non-transactional data from the legacy cache systems (ICBS, InProTrak, WRAP and Cache Tracker) that can be easily reused in the new centralized ICBS will be migrated or manually entered in the new system.
 - b. Transactional data from legacy systems will not be migrated to the new system.
9. Identify enterprise (system-wide or master) data and cache data:
 - a. The Sterling team, with input from ICBS-R SME’s, has determined which data is NWCG enterprise data, and which is cache-specific data. As a general strategy, enterprise data will be migrated prior to deployment at the first cache. Each subsequent cache deployment will use these data elements as they exist in the new system.
 - i. Enterprise Data - this consists of data elements that are common across caches. A product in the NFES catalog is an example of an enterprise data element. For more detailed information on this, please see the ICBS-R Data Migration Plan.
 - ii. Cache Data – this consists of data elements that are specific to each of the caches. Inventory is an example of cache specific data. Cache data elements will be migrated prior to deployment at each of the caches.
10. Data migration methods - Where possible, the Sterling team uses its proprietary application called the Rapid Deployment Tool (RDT) to facilitate the transfer of data from the legacy ICBS to the new version. The RDT only requires the input data to load into the Sterling solution. In other words, there are no scripts to write to load

the data into the new application which typically saves time. When the RDT is either not applicable or practical, data is manually entered into the application.

11. ICBS-R Project personnel will determine the archive requirements for the new system in order to maximize access to historical data while minimizing system performance degradation. This determination will consider what data is needed; how long it's needed; and in what format it's needed (e.g. querying, reporting, performing transactions, etc.).
 - a. During initial implementation, the archive feature inherent to the Sterling COTS product will be used for data archiving
 - b. In a later release, the FAM Data Warehouse may be used for data archiving
 - c. Users will access archived data via the Cognos reporting tool which is built into the Sterling product

Training

Training is the act of providing and receiving instruction concerning a specific subject. The objective of effective training is for the targeted user to apply practically what they have learned theoretically. To be effective, the training cadre must have a thorough knowledge of the subject they are teaching. Furthermore, the training should take place at a juncture in time where the user can use new skills immediately after the training takes place.

Training Testing

ICBS-R Project SMEs (Subject Matter Experts), Project trainers, Sterling project team members, and Helpdesk staff assist in testing all course materials and methods to ensure that the training will be effective. If the need exists, new training materials are developed with each successive ICBS release or with the addition of new functionality.

Training Strategy

ICBS lead instructor training will occur for a selected few super-users, who will help coach, train and answer ICBS related issues and questions.

Training involves a mix of formal and informal instruction, individual and group instruction, coaching by ICBS lead instructors, on-the-job-training and self-paced online instruction.

Training Development

Training courses and materials are being developed in a collaborative manner by the Implementation Team Leader and Sterling training specialists. This enables the project team to take advantage of pre-existing Sterling training products and training methods, and tailor them to the interagency cache community's unique needs.

In addition to training materials for use of the ICBS system itself, a PowerPoint-based "quick reference guide" on the use of Symbol scanning guns has been developed by the

Implementation Team. In the Sterling Team's experience, on-the-job-training ("OJT") is sufficient to give users the knowledge to begin using scanning guns in conjunction with the new ICBS. The PowerPoint will augment that OJT. Symbol and Sterling Mobile Applications Scan Gun User's Guide will also be available for users' reference.

Training Materials

The overall training needs and materials of the interagency cache system were assessed, taking into consideration various options that are best suited to meeting those needs. Some of the options that were considered are as follows:

1. Existing Sterling reference materials
2. Customized ICBS eLearning tool
3. ICBS-R Project developed materials
4. Quick reference guides

Most of the ICBS training consists of items 2, 3 and 4 above.

Training Prerequisite skills

Prerequisite skills are skills that students should have prior to beginning ICBS training to ensure a higher degree of success. The higher degree of prerequisite skills one possesses, the more beneficial the classroom experience. Although having these skills is desired, possessing them is not mandatory.

- The assumption is: That the majority of ICBS-R user groups have a certain degree of competence using a PC.
- Those who are lacking in basic computer skills should be given, in house, the necessary OTJ training to become proficient in the use of a PC.

Desired prerequisite skills

- Database navigation skills and techniques.
- Mouse and keyboard usage
- Logon procedures
- Basic internet navigation

Developing Skills

- On-the-job training
- On-the-job experience
- Self study materials
- Vendor delivered training
- Agency training courses

Training Products

A key training product for the new ICBS is the Sterling "eLearning" tool, which is a web based, self directed, interactive tool that covers all aspects of the ICBS application. The "out of the box" eLearning tool has been customized specifically for cache users so that it covers typical cache use of the new system.

The Implementation Team worked with Sterling educational specialists to develop logical eLearning modules that group specific tasks around those typically performed by

individuals in specific cache positions (e.g. administration, warehouse, receiving, shipping, etc.). A member of the ICBS-R support staff has been trained to maintain the eLearning product so that it can be updated as the ICBS system itself changes.

Additional training products include course outlines and PowerPoint slide shows, and quick reference guides. These products are updated when new system updates occur (e.g. new version of COTS Sterling is released; new interfaces with other systems are developed; new ICBS functionality is deployed; etc.).

ICBS User Groups

Course content is tailored to “user groups” (which are basically user roles) in the new ICBS. User groups restrict/enable the permissions of the user belonging to that group. Several user groups are defined in ICBS for both the NWCG enterprise level (i.e. system-wide) and at the cache level (i.e. for a particular cache).

Many users will belong to more than one group and therefore have various permissions within the new system. Some users, particularly those involved in administering the system or data at the NWCG or cache level, need to be trained in the use of Sterling Configurator in order to perform their role(s).

The following is a description of the current user groups in ICBS. Additions or modifications to these user groups will likely be necessary after initial system implementation (for example, NWCG Helpdesk personnel might be assigned a number of user groups, or a separate user group might be established specifically for them):

Table 1 – ICBS User Groups

Group ID	Group Name	Group Description
NWCG_ALL	NWCG_ALL	Read/write access to all levels of console application (cache and NWCG). This is the group that “NWCG System Administrators” are assigned to
NWCG_Inquiry	NWCG Inquiry	View only access to all cache-level NWCG screens
NWCG_Cache_Manager	NWCG Cache Manager	Read access to cache screens.
NWCG Cache Account Admin	NWCG Cache Acct Admin	Creates, deletes and manages application user accounts
NWCG_Cache_Sys_Admin	NWCG Cache Sys Admin	Read/write access to all cache-level screens, including cache-level configuration in the Configurator, System Management and Exception consoles
NWCG_Help_Desk	NWCG Help Desk	Read access to cache screens.
NWCG_Mobile_User	NWCG Mobile User	Read/write access to mobile consoles
NWCG_Procurement_Spvr	NWCG Procurement Spvr	Read/write access to inbound cache screens.
NWCG_Receiving_Supervisor	NWCG Receiving Spvr	Read/write access to receiving cache screens
NWCG_Supply_Tech	NWCG Supply Tech	Read/write access to all cache transactions screens, including all orders, issues
NWCG_Shipping_Supervisor	NWCG Shipping Spvr	Read/write access to outbound cache screens.
NWCG_Supply_Supervisor	NWCG Supply Spvr	Read/write access to inventory cache screens.
SYSTEM	SYSTEM	Hub level configuration access including user group configuration

Course Content

ICBS training is provided at a given cache or within a Geographic Area for more than one cache consists of 28 PowerPoint and Labs. The PowerPoint and Labs cover all processes in the ICBS-R application. The processes are completed on the console (PC) and with the scan gun devices. For an overview of the course material, please visit our website at: <http://www.icbs.nwcg.gov/> and open the Training page.

Typical Training Session Schedule:

The general plan is to provide instruction over the course of two weeks at each cache or Geographic Area, with sessions typically beginning on a Monday afternoon and ending on Thursday afternoon or Friday morning to allow students and instructors from outside the local area time for travel. To the extent work and personal schedules permit, ICBS instructors **may** be able to provide training Tuesday through Friday and travel home on Saturday, but this will be the exception.

The first week of training, the student(s) are introduced to the various processes in the ICBS-R application through the PowerPoint and lab modules. The second week of training is spent reinforcing what was learned the previous week, i.e. The instructors go back over any process that the students want/need more practice on, using the actual cache's data in real world scenarios, in the training instance.

Typically, during the second week of training the cache that's being trained and implemented will go "live" with the production application. This generally occurs on Wednesday or Thursday, after which, the Manager/Administrator, with training personnel assistance, will go into the Configurator and set up user groups and set permissions for cache personnel. An authorized user will also go into the production instance and build up any trackable kits that have been broken down and process any business that has been put on hold through the implementation process, again with the assistance from the training cadre.

All students, both warehouse and administrator/manager personnel will attend all 28 modules. Many of the modules are inter-connected, i.e. the administrator creates the process being worked on in the console, and a warehouse worker finishes the process on the scan gun.

Sterling Configurator Training

The "Configurator" is a tool in the commercial-off-the-shelf Sterling application that enables authorized users to change settings, make system and data configuration changes, change business rules and generally make the system perform as needed so that it will support cache business.

Sterling Configurator training will be required of those who will be in the following user groups:

1. NWCG System Administrator: this role is assigned to a small number of cache personnel who manage various settings, configurations, high level business rules,

customers, units, system values, data/metadata that are applied across the entire cache enterprise; and some user profile management.

2. NWCG Catalog Administrator: this role is assigned to a small number of cache personnel who manage catalog data – including local catalog items – that are applied across the entire cache enterprise.
3. Cache System Administrator: this role is assigned to a small number of personnel at a single cache who manage various cache-level settings, configurations, and values and metadata that are applied to that cache’s ICBS data.
4. Cache Account Administrator: this role is assigned to one or two individuals at a cache who perform user profile management.
5. Cache Catalog Administrator: this role is assigned to a small number of cache personnel who manage cache-specific attributes of existing catalog items.
6. Cache Manager: this role is assigned to a small number of cache personnel who have view-only access to all cache-level screens and configurations.

These are the students who will be in the “Administrator/Cache Manager” training sessions.

The Sterling eLearning tool is **not** being developed to provide Configurator training, because use of the Configurator is not specific to ICBS. Instead, standard out-of-the-box Sterling Configurator PowerPoint training slides and scripted exercises will be used.

At the current time, the ICSB-R Project Team anticipates that basic Configurator training will be included in the Administrator/Cache Manager module, and will be delivered in each Geographic Area’s training session (e.g. four hours for cache-level users and eight hours for NWCG-level users). A select number of Helpdesk personnel, and perhaps one or two NWCG System level users, may be sent through a formal Sterling Configurator course provided by the Sterling Commerce Corporation or third party provider.

In addition to the above training, the ICBS-R Team is considering providing an initial Sterling Configurator training session for those employees assigned to Cache System and Data Administrator user groups, and the NWCG System and Catalog Administrator user groups.

Once the new ICBS system has been deployed to the cache community, additional centralized focused courses might be considered for introducing new concepts, teaching new system functionality (e.g. ROSS-ICBS interface), or even refresher training. This would increase the skills of a group of “super users” who could take this knowledge to their Geographic Areas teach them to their peers.

Training Cadre

The training cadre will consist of the Implementation Team Leader, five Lead Instructors (preferably from most geographic areas) and technical support .

Lead Instructors

The cache Lead instructors are thoroughly trained in all phases of the ICBS program. They in turn help to train individuals in all aspects of the ICBS application. Lead instructors range from warehouse lead personnel to database administrators and cache managers.

Lead Instructors are required to have these basic knowledge and skills:

- Good understanding of computers and the application
- Ability to engage targeted audience through lively interaction, motivation, and good facilitation.
- Good understanding of fire cache operations.
- Strong team member
- Well spoken and a basic understanding of teaching methods.
- Ability to accept constructive criticism and adapt presentation methods with changing environment.
- Ability to break down complex issues into understandable concepts

Training for lead instructors includes thorough training on the ICBS application, but will also include tips on how to be a good instructor.

- Methods used to improve instructional technique include:
 - Peer coaching
 - Practice in front of mirror
 - Use of appropriate anecdotes and jokes
 - Team building and facilitative exercises
 - How to deal with difficult people and situations

A list of duties for lead instructors has been written and is listed in Appendix F

Sterling/IRM support

The Sterling ICBS-R Team has a high degree of knowledge not only in the ICBS application and architecture, but also in the backbone architecture required for ICBS (e.g. WLANs, network printers, scan guns, etc.). Agency IRM support is also required in the areas of connecting, testing, trouble-shooting and supporting WLANs and printers on the appropriate agency networks. The Sterling ICBS-R Team plays a support role in trouble-shooting these components.

Training Delivery Tasks

Consideration of the tasks needed for application training is crucial to the success of the training deliverables. Consideration need be given to the following:

- Number of students in the class (determines number of computers needed)
- Length of class session
- Size of classroom (room to move around-comfort level)
- Number of instructors needed per class
- What audio/visual technology is needed

Training Course Schedule

For a copy of the current training course schedule, please see Appendix E.

Product Changes/Added Functionality

As new ICBS applications are released or new functionality is added, the Sterling group will notify the ICBS Implementation Team. The Implementation Team will update the training materials as needed for the new releases or for the added functionality.

Application Practice

An ICBS training site is available for users to practice with the application and gain a better understanding of the program. Use of the training instance of the program requires coordination with the ICBS-R Implementation Team Leader since the same instance is used for cache training and implementation.

Training Evaluation

An evaluation matrix has been developed that enables the trainee to evaluate not only the Training Products, but to evaluate the Instructors as well. These evaluation materials are handed out at each training session.

Application Instances/Servers

At a minimum, NITC provides the following “instances” of the ICBS system:

- a. Production (used only for actual cache processes)
- b. Pre-Production (used by Sterling or O&M contractor to stage upcoming versions of ICBS prior to being deployed as the production version)
- c. Development (used by Sterling or O&M contractor for system development)
- d. Training/Testing (used by Sterling or O&M contractor and/or ICBS-R SMEs to conduct system testing and training activities)

ICBS Cache Implementation Readiness Checklist

The ICBS-R Project Team has developed a concise Cache Implementation Readiness Checklist (please see Appendix D), which will be used to ensure everything is in place to make implementation of the new ICBS successful at each cache facility.

Prior to assisting a cache come to online with the re-engineered system, the ICBS-R Project Team consults with the Cache Manager or his/her designated representative, and provides assistance as needed, prior to the specific cache being implemented, to ensure that all requirements of the Cache Implementation Readiness Checklist have been met.

For Example:

1. After the implementation schedule has been finalized, the Cache Managers are notified when their particular cache is scheduled for implementation.
2. A blank Cache Implementation Readiness Checklist is provided to the Cache Managers.
3. The ICBS-R Project Team, with the Sterling team’s input, provides help to the Cache Manager or his/her representative to complete the Implementation Readiness

Checklist. Those caches at the top of the Implementation Schedule will receive priority assistance.

4. Most of the National Caches' have SME representation on the project. It is, in part, their responsibility, to monitor the progress that is being made at their representative cache toward meeting the provisions of the Implementation Readiness Checklist, and report that cache's progress and needs back to the Project Team.

Some of the factors that may influence cache readiness include:

- Activity levels from fire or other incident types.
- Infrastructure in place (e.g. adequate agency network speed, wireless local area network in place and tested; adequate number of personal computers, printers, scanning devices, etc.)
- Inventory Accuracy (e.g. physical inventory completed just prior to implementation)
- Data migration and input
- Individual cache preparation
- Availability of trained key staff
- Availability of other caches' trained staff or ICBS-R SMEs to lend support
- Availability of user support (ICBS Helpdesk)
- Continuity of Operations/Business Resumption Plan (COOP/BRP) completed and reviewed

Appendix A

Minimum System (Computer Hardware/Software) Requirements

(Updated July 21, 2010)

ICBS is a web-based application that resides in a client/server relationship. The servers for ICBS are located at the National Technology Information Center (NITC). The data entered into the ICBS application resides on the server, the ICBS application resides on the user's computer. The user will need access to the server location to work with the ICBS application and all data.

Personal Computer or Laptop	Operating System	Required Monitor and Video Card	*Recommended Processor	*Recommended Hard Disk (minimum available)	*Recommended Memory
Computer with Microsoft compatible keyboard and mouse or pointing device	Windows 2000 (service pack 2) Windows XP (service pack 2)	Capable of 1280 x1024 resolution	Pentium or higher; 1 GHZ or faster	40 Gigabyte minimum	2 Gigabyte minimum

*ICBS has no absolute minimum for these three items. This minimum configuration is a general recommendation for PCs that will be running the Windows 2000 or XP and the Internet Explorer internet browser.

Also:

- A Web Browser is required: **Internet Explorer version 6.0 with service pack 1 or greater (including Internet Explorer 8.0)**
- In order for the ICBS Configurator to launch, or for kitting/dekitting processes to be performed, **Java plug-in version 1.6.0_20 (1.6 build 20)** must be installed on the user's machine. If a newer Java version is "pushed out" to a user's PC/laptop by his/her agency, the user must uninstall that version. The next time he or she launches ICBS Configurator or attempts to perform kitting/dekitting, ICBS will install the correct Java plug-in version

Appendix B

ICBS Training strategy

1. SMEs given training prior to Beta test
2. Lead Instructor training to occur for selected cache personnel (7 have been chosen)
3. ICBS eLearning tool developed for all aspects of the application
4. PowerPoint developed for scan gun usage
5. PowerPoint slides developed for Lead Instructor training.
6. Helpdesk personnel receive training during Beta test
7. ICBS-R SME(s) assists helpdesk staff onsite during initial implementation
8. Helpdesk has all necessary reference materials and training tools to be successful.
9. The training strategy is focused toward “just in time training” for a geographic area.
10. The Lead Instructors will arrive at the training site one day prior to the training to familiarize themselves with the facility, ensure connectivity to NITC, that there are adequate computers, and all necessary training materials are available, including audio-visual equipment.
11. The number of students per session will determine whether there will be 2 or three instructors.
12. The eLearning tool is just one tool at the disposal of the instructors and augments training module PowerPoints, hand-outs and labs.
13. A PowerPoint format is used for introduction to each section, with the students working through scripted scenarios for each segment of the application using their own data that has been loaded into the training instance
14. A syllabus will be developed by the training cadre that outlines the main topics to be covered in the ICBS training.

Table 2 - Cache Training Schedule-Example

Geographic Area/Caches	Training Date	Training Location	Assigned Instructors
Southwest /Prescott (PFK) and Silver City (SFK) Caches	July 15-18: Admin/Manager July 16-18: Warehouse Leads	Prescott Fire Cache	Ed Plapp-Lead Jeri Billiard-Assist
Great Basin /Great Basin Cache (GBK)	July 22-25: Admin/Manager July 23-25 Warehouse Leads	Building 51 NIFC compound	Jeri Billiard-Lead Karen Mason-Assist

California/ Northern and Southern California Caches (NCK and LSK)	July 29-Jul 1: Admin/Manager July 30-Jul 1: Warehouse Leads	LSK training room #5	Sean Phelen-Lead Cameron Hughes- Assist

Note: The above training schedule is an example only. The schedule will be finalized and filled in at a later date to include both National and Local Area Support caches

Appendix C

Implementation Leader's Checklist

1. Lead Instructors identified
2. Lead Instructors receive ICBS training
3. Training materials and references complete
4. Room(s) identified and secured where training will take place.
5. Individual cache's implementation readiness checklist has been completed and approved by the ICBS-R Team.
6. Helpdesk trained and online to assist at implementation
7. Implementation schedule finalized for both National and LASC.
8. Advance teams are in place and ready.
9. Connectivity to NITC at training site verified.
10. Lead instructor training schedule in place.
11. Implementation Plan finalized
13. Lead instructors have been given tips and have practiced how to be more effective in training delivery.
14. Coordinate with advance team and cache to be implemented.
 - Date of arrival of advance team.
 - What advance teams objectives are
 - Expectations of cache to be implemented in relation to advance teams' arrival.
 - Materials and support needed by advance team to complete objectives
15. Lead Instructors schedule has been finalized and approved.

Appendix D

Cache Implementation Readiness Checklist

Cache Location:

Conducted by:

Reviewed by:

CODE KEY: E=Exceeds Standard; M=Meets Standard; NI=Needs Improvement; NR=Not reviewed; NA=Not Applicable				
Step #	Description (standard)	Additional Information	Code	Remarks
1) DATA MANAGEMENT				
1.	All warehouse zones have been created in new ICBS and entered into provided "Master Locations Spreadsheet"	Cache personnel will assist ICBS-R Advance Team with this task and the ones that follow		Step #1 of the implementation process
2.	All storage locations have been created in new ICBS and entered into provided "Master Locations Spreadsheet"			This is done in conjunction with Step #1 above.
3.	All dedicated locations have been identified and SKU (NFES) items have been entered into the "SKU Dedicated Locations Spreadsheet"			
4.	All location labels have been printed and positioned at each corresponding location throughout the cache	This needs to occur, prior to the physical inventory count		So as to avoid location confusion while doing the first "pre-load" inventory," the location labels will need to be posted throughout the cache
5.	Physical inventory count of cache has been completed for each storage location, and any discrepancies have been	Record location inventory count on a laptop into the "Location		

	resolved	Inventory Spreadsheet”, as you progress through the cache		
6.	Physical inventory data has been input into the “Location Inventory Spreadsheet” for migration to training instance and new system	Data is loaded from all spreadsheets (Dedicated SKU, Master Locations, and Locations Inventory Spreadsheets into the training instance, initially for data testing and training purposes.		
7.	Inventory data have been entered into new ICBS	This will occur after the cache data has been loaded from all spreadsheets (#6) into the training instance, training has been held and all data has been tested.		
8.	NWCG Unit IDs have been verified and/or entered for units served by cache			
9.	Customer IDs have been verified and/or entered for non-NWCG customers served by cache	This task is completed with guidance and assistance from Jeri B into the “Customer ID Spreadsheet” provided		
10.	Local cache suppliers have been verified and/or entered for cache	This task is completed with guidance and assistance from Jeri B, into the “Local Supplier Spreadsheet:		

11.	All local NFES items have been assigned and verified and/or entered for cache	This task is completed with guidance and assistance from Jeri B, into the “Local Item Spreadsheet.”		
12.	<p>All local settings and data have been entered into ICBS:</p> <ul style="list-style-type: none"> • WMS task activity codes- Sterling/ICBS-R member • WMS inv adjustment reason codes- Sterling/ICBS-R team member • Count configuration data- Sterling/ICBS-R team member • Devices (scanners, printers, scales, etc.)- Sterling/ICBS-R team member • Disposition codes and transition rules- Sterling/ICBS-R team member • Equipment • Inventory monitor, rules, constraints, etc.- Sterling/ICBS-R team member • Storage zones and locations-ICBS-R Team and cache personnel • Receiving preferences- Sterling/ICBS-R team member • Packing strategy- Sterling/ICBS-R team member • WLS PLA configuration- Sterling/ICBS-R team member • Putaway strategy–ICBS-R team • Queue subscription 	<p>-The activities listed for #12 are completed either on-site or remotely. Some of the activities are accomplished by the Sterling team, other tasks, jointly between the Sterling team, the ICBS-R Project team, and the cache being implemented.</p> <p>-The Dedicated Location Configuration, Cache Inventory, Storage Zones and Locations, Putaway/Pick Strategy, Item Data specific to the node for example is information that is captured into each corresponding spreadsheet, and then downloaded into the Sterling proprietary RDT (Rapid Deployment Tool)) for migration into the application. Other tasks, such</p>		* All tasks listed in #12 are accomplished either by Sterling, the Sterling/ICBS-R team, by the cache being implemented.

	configuration- Sterling/ICBS-R team member <ul style="list-style-type: none"> • Retrieval strategy-ICBS-R team • Dedicated location configuration-ICBS-R team/Cache • WMS tasks configuration- Sterling/ICBS-R team member • Users/group setup- Sterling/ICBS-R team member/Cache • Item data specific to node- Sterling/ICBS-R team member • Cache inventory-Cache staff 	as WMS inventory adjustment reasons codes, WMS tasks configuration are tasks that are accomplished through the application configurator, by a Sterling or Gov't team member.		
2) ICBS SECURITY AND ACCOUNT MANAGEMENT				
13.	Cache System Administrator role has been assigned to person who will manage ICBS accounts			It's recommended that two CSAs be assigned at each cache: a primary and a backup person
14.	Cache administrator has completed training on account management process and required security procedures	This training is conducted in combination, by the Sterling and the ICBS-R training team.		
15.	User accounts have been assigned for all ICBS users associated with the cache	All user's must complete agency required security training and sign "Rules of Behavior" documents before being given log-in information.		

3) HARDWARE/SOFTWARE/NETWORK

16.	Adequate number of networked PCs are in place for ICBS users, and conform to minimum hardware software configuration as shown below:	Reference: http://icbs.nwcg.gov “Project Reference Materials”		
17.	Operating system: Windows 2000 or XP operating system with service pack 2			
18.	Video card: capable of 1280 x 1024 resolution			
19.	Browser: Internet Explorer 6.0 with service pack 1	Note: this may change to IE 7		
20.	Approved networked label printer has been installed and tested	Zebra-Z4M Plus or Zebra ZM400		
21.	Cache has adequate label stock to complete initial location and inventory labeling			
22.	Approved shipping scale (Mettler-Toledo PS-60) has been installed and tested	This is <u>not</u> required until after interface with FedEx/UPS is in place		
23.	Access to ICBS from user PCs has been tested			
24.				

4) WIRELESS LOCAL AREA NETWORK (WLAN) INFRASTRUCTURE

Note: this section is only required of those caches that have been identified to use wireless scanning devices)

25.	Cache physical/network information has been submitted to ICBS-R Team including: general location, diagram, building measurements, racks/shelving, bldg function, construction, partitions, AC outlets, work	Reference letter dated 2/23/2007		
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	areas, photos and network equipment)			
26.	Cache WLAN site survey has been completed by ICBS-R Wireless Team			
27.	Cache WLAN design has been reviewed by cache representative			
28.	WLAN has been installed at cache			
29.	WLAN connection to agency network has been tested and verified			
30.	WLAN security configuration has been tested and verified			
31.	Wireless coverage at all cache "AIT" work areas has been tested and verified with wireless test equipment			
5) WIRELESS SCANNING DEVICES				
Note: this section is required of those caches that have been identified to use wireless scanning devices)				
32.	Adequate number of scanning devices, and accessories, are available and fully charged	Ensure that scan devices have the correct image		
33.	Current NWCG applications and settings (latest image) have been applied to all scanning devices			
34.	Wireless coverage of all cache AIT work areas has been tested and verified with scanning devices	The testing and configuration of the scan guns is done at the pre-implementation stage by the Sterling and the Government Project team.		
35.	Wireless access to ICBS application has been tested and verified			

36.	Network user accounts for devices have been provided to the cache system administrator by the agency network group	The ICBS-R Team contacts the network group and requests that this information be transmitted to the Cache System Administrator		One log-in account is assigned for each gun issued to the cache (e.g. sg1prescott, sg2prescott, etc.)
6) WAREHOUSE SETUP				
37.	All warehouse zones have been identified and recorded as recommended by team and input from the cache being implemented			
38.	The move in/Move out sequencing has been recorded on provided SKU Dedicated Locations spreadsheet.			
39.	All zones that can have inventory picked from them have been identified and recorded. Those locations that are empty are either frozen or recorded as an overflow zone.	Consult with team for how to do this. This data is collected and entered into the Dedicated SKU Locations spreadsheet		
40.	All zones that can have kit building performed in them have been identified and recorded-These will need to be identified as “kit building” zones	Consult with team for how to do this. Kitting and De-kitting is performed in the VAS zone.		
41.	All storage locations have been established and documented by zones as recommended by team into the Locations Master Spreadsheet			
42.	Each storage location quantity identifier is based on the optimum quantity of an item that can fit into said location.	The number of items that can fit into a storage location is marked on the provided spreadsheet as simply Q5,		

		Q10,(quantity 10), etc. This information is recorded in the Locations Inventory Spreadsheet		
43.	All storage locations have been labeled (location ID and bar code)	The process of printing location labels is performed by the Sterling team		
44.	Stock has been moved to different storage locations as necessary:	Consult with team for recommendations		
45.	Kit zones have been set up with all kit building materials located in those zones	The kit zones have been identified on the Master Locations Spreadsheet		
46.	Bulk storage zones have been identified with bulk materials located in those zones	The bulk zones have been identified on the Master Locations Spreadsheet		
47.	Pick zones have been identified and labeled, and NFES stock moved into those zones.			
48.	The complete cache inventory (i.e. each NFES item) has been relabeled with a bar-coded label produced by the new ICBS	This work can be completed as soon as ICBS label printing has been tested; and a Zebra printer is available on the network at the cache		To efficiently accomplish location and product bar code labeling, 3-4 ICBS-R team members working in conjunction with cache staff would be optimum
49.	A complete location-level physical inventory count has been completed, reconciled and recorded just prior to implementation	Record count in legacy ICBS or spreadsheet as recommended by team		The pre-implementation inventory is completed using the scan devices.

50.	A determination has been made by Cache Manager and Implementation Team Leader that cache meets NFES standards and can proceed with implementation	If any significant barriers exist that would prevent implementation of ICBS at cache, team will document for the ICBS-R Steering Group and move on to implement the next cache		
7) CONTINUITY OF OPERATIONS/BUSINESS RESUMPTION PLANNING				
51.	A Business Resumption Plan has been completed for the cache using the ICBS-R template	Please reference ICBS-R BRP document for template		
52.	<p>Contact information (<u>including after-hour/weekend numbers</u>) for all relevant emergency and support providers has been included in plan and verified:</p> <ul style="list-style-type: none"> • ICBS helpdesk • Agency IT support desk • Local IRM support (if any) • Scanning device support • WLAN support • Power company • Telephone company • Cable company • Internet Service Provider • Others 			
53.	BRP has been reviewed and approved by ICBS-R Team member from a different cache (since we have team members from other caches, this should ensure that a second set of eyes from another cache will review each one)			

54.	BRP has been reviewed and approved by cache host agency administrative unit			
55.	Once approved, BRP has been reviewed by all key personnel in cache, as identified by Cache Manager			
56.	<p>In-house drills have been conducted on Business Recovery procedures:</p> <ul style="list-style-type: none"> • ICBS system outage • LAN/WLAN outage • Dial-up access through agency to ICBS • Arrangements for another cache to resume operations • Alternate locations have been identified and authorized • Use manual system 	<p>Some key items to test and verify:</p> <ul style="list-style-type: none"> • All phone numbers are clearly posted • Test computer(s) w/ modem for dial-up access • Test ability of neighboring cache to assist • Test alternate site for accessing ICBS • All necessary hard copy forms are on hand to record cache transactions 		
8) TRAINING				
57.	<p>All cache staff will receive training in all training modules</p> <ul style="list-style-type: none"> • Cache System Administrator • Cache Catalog Administrator • Supply Tech • Order/Issue Entry • Cache Manager • Receiving Supervisor • Shipping Supervisor • Supply Supervisor • Procurement Supervisor • Inquiry (Reports) • Cache View-Only • Cache Mobile User) 	<p>Work with Implementation Team on this</p> <p>Don't forget local seasonal, AD, EFF and "militia" staff.</p>		

58.	Number and names of students needing training have been provided to the Implementation Team			
59.	All users have completed any agency-required security awareness training and/or background checks prior to using PCs or scanning devices	This is required annually		
60.	Appropriate “Rules of Behavior” document(s) have been signed by each user (See Appendix H) and are on file with Cache System Administrator	Please see also: http://icbs.nwcg.gov/Training.html This is required annually		
61.	Assistance has been provided to the ICBS-R Lead Instructor to schedule training session(s) for the geographic area <ul style="list-style-type: none"> • Suggest suitable training and lodging facilities • Assist in arranging PCs, projectors, screens, flipcharts, etc. 			On-site training is preferred due to learning tasks associated with scan device usage.
62.	Working with Lead Instructor, final “go-no go” decision has been made to proceed with training, based on area activity, facility preparation, data collection and validation, and availability of trainees.			
63.	Constructive feedback has been provided to the team following training session(s)			
64.	All trained cache personnel have demonstrated their knowledge and skill to: <ul style="list-style-type: none"> • Successfully perform their job • Access online eLearning and other training 	Follow-up training and/or coaching should be provided to those who need it		

	<p>materials</p> <ul style="list-style-type: none"> • Obtain assistance from the Helpdesk and other ICBS users • Demonstrate ability to program Zebra-Z4M Plus or ZM400 label printer 			
65.	Once cache staff is moderately proficient in ICBS, individuals have been made available to help train/coach users in other caches – particularly LASCs – so they can come on board.			
66.	Users have been provided information on how to self-enroll to receive email/text NITC “icbs-r notifications” on system status	http://mail.nwcg.gov/mailman/listinfo/icbsr_notify		
9) PRACTICE PROCEDURES				
67.	<p>Access web-based ICBS eLearning program and perform tasks learned in the following training modules:</p> <ul style="list-style-type: none"> • Basic Training Module • Office Functions Module • Warehouse Operations Module • Administrator/Cache Manager Module 			
68.	<p>Users in “mobile user” group use scanning devices to practice the following:</p> <ul style="list-style-type: none"> • PowerPoint scan gun basic user instructions • Returns procedures • Inventory procedures • Receiving Procedures • Shipping procedures 			
69.	Authorized users access ICBS practice instance and use the Sterling Configurator to perform tasks related to			

	<p>these roles:</p> <ul style="list-style-type: none"> • Cache System Administrator • Cache Catalog Administrator • Cache Manager 			
70.	<p>Business Resumption Plan practice: (Depending on BRP chosen)</p> <ul style="list-style-type: none"> • Cache to Cache • Cache to Dispatch Center • Switch to hard copy • Agency modem dial-up to access ICBS at NITC • Switch to off-site computer center or other designated site. • Helpdesk included in practice sessions. 			
72.	<p>ICBS-ROSS Interface:</p> <ul style="list-style-type: none"> • Practice sessions have been conducted between dispatch and cache offices using the interface. 	<p>The ROSS-ICBS NFES catalog interface was deployed in 2008. The incident, request, shipping interface is scheduled for release in early 2010</p>		
73.	<p>Cognos Reports:</p> <ul style="list-style-type: none"> • Practice sessions have been completed on accessing Cognos reporting tool. • Practice sessions have been completed using the Cognos tool for printing reports. • Practice sessions have been completed, using the Cognos application for the customization of reports (this may be limited to a select 			

	number of cache employees).			
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Appendix E

Cache Implementation Schedule

National Caches:

Implementation for the National Caches will occur one cache at a time. It is expected that one to two weeks (i.e. three to six working days) will be needed to implement each National Cache, including some ICBS-R Advance Team work the week before training. This could change due to a gain in knowledge after the first implementation. Implementation will be done primarily by Sterling and Government project SMEs and trained National Cache personnel working with personnel of the affected cache.

An advance team made up of ICBS-R Project Team personnel, Sterling personnel and/or trained personnel from previously-implemented caches may work with personnel at the affected cache the week before implementation in order to:

1. Complete the Cache Implementation Readiness Checklist
2. Ensure that COOP/BRP has been completed
3. Ensure any cache-specific data has been entered
4. Zones and Locations are defined in the ICBS template for that cache
5. Physical inventory count has been completed just prior to implementation.

Local Area Support Caches:

LASCs will be implemented following the implementation of the National Caches. It is expected that three to five working days will be needed to implement each LASC. Implementation of the LASCs will be done by project SMEs and trained National Cache personnel.

It may be feasible that more than one LASC be implemented at time (this will be determined by SME and trained cache personnel availability).

The following steps will be completed before implementation:

1. Complete the Cache Implementation Readiness Checklist
2. Ensure that COOP/BRP has been completed
3. Ensure any cache-specific data has been entered
4. Zones and Locations are defined in the ICBS template for that cache
5. Physical inventory count has been completed just prior to implementation
6. NFES supply and refurbishment standards have been met.

Proposed Cache Implementation Sequence:

Although not set in stone at this point in time, the implementation will take into consideration such factors as historical fire season, individual cache readiness and WLAN security issues. The following is a rough sequence of implementation beginning in early 2008. A caveat: beyond the first three scheduled caches, the sequence will be adjusted according to incident support levels and other factors outside the team's control:

The proposed implementation sequence is as follows:

Order	Geo. Area	Cache Name	Cache Unit ID	Notes
1	RM	Rocky Mountain Area Incident Support Cache	CORMK	Went live May 14, 2008
2	SW	Southwest Area Prescott Incident Support Cache	AZPFK	Went live May 15, 2008
3	SA	Southern Area Incident Support Cache	KYSAK	Went live August 2008
4	EA	Northeast Area Incident Support Cache	MNNEK	Went live on Oct 17, 2008
5	SW	Southwest Area Silver City Incident Support cache	NMSFK	Went live January 9, 2009
6	CA	Northern California Incident Support Cache	CANCK	Went live February 26, 2009
7	CA	Southern California Incident Support Cache	CALSK	Went live April 2009
8	NW	Northwest Area Fire Cache	ORNWK	Went live January 2010
9	NW	Wenatchee Satellite Cache	WAWFK	Went live May 2010
10	NW	LaGrande Satellite Cache	ORLGK	Went live November 2009
11	NR	Northern Rockies Area Incident Support Cache	MTNRK	Went live July 2009
12	GB	Great Basin area Incident Support Cache	IDGBK	Went live April 2010
13	AK	Alaska Incident Support Cache	AKAKK	Scheduled for Summer/Fall 2010
4	AK	Alaska State Fire Warehouse	AKSFS	
15	NR	Coeur d'Alene Interagency Fire Cache	IDCDK	Went live June 2010
16	NR	Billings Fire Cache	MTBFK	Went live September 2009
17	SA	Arkansas/Oklahoma Interagency Fire Cache	ARHSK	
18	GB	Eastern Idaho Interagency Fire Cache	(unit ID needed)	
19	GB	South Central Idaho Fire Cache	(unit ID needed)	
20	GB	Elko District Fire Cache	(unit ID needed)	
21	GB	Las Vegas Fire Cache*	(unit ID needed)	

The above list includes the seven Local Area Caches (numbers 15 through 21) that the ICBS-R Steering Group determined qualify for ICBS-R implementation (ref: letter dated February 2, 2007).

The project may implement one small/low-volume LASC during beta testing in order to test the low volume ICBS template and low volume AIT functionality. At this time, the Las Vegas Fire Cache, which has both Forest Service and Bureau of Land Management agency networks available, has been designated as this beta test cache.

Appendix F

Lead Instructor Duties

1. Attend all Lead Instructor training sessions.
2. Practice on application after having completed training sessions.
3. Coordinate with other instructors assigned to your specific geographic area.
4. Plan and coordinate training sessions in assigned geographic area(s).
5. Advertise training session, confirm number of students in the session, and obtain names of students attending.
6. Reserve meeting/training room meeting all training specifications listed.
 - a. Training room with computer, projector and screen for instructor(s)
 - b. Training room needs to be large enough for determined number of students.
 - c. Computer for each student.
 - d. Availability of flip charts/paper/markers for meeting rooms.
7. Develop letter and mail to attendees, regarding training location, suggested lodging, training dates, etc.
8. Obtain following supplies for the session:
 - e. Name tags
 - f. Flip charts and extra paper
 - g. Pens, pencils, notepads
9. Consult with area representative on class makeup and any specific training needs. Tailor class content and schedule as needed, and communicate this to other instructors.
10. Conduct training sessions in assigned geographic area(s).
11. Notify user Helpdesk of upcoming training session and upon completion of training that cache is going live with the new ICBS.
12. Document and communicate any changes needed in training curriculum.
13. Assist in other geographic area training session(s).

Appendix G

Cache Site Implementation Tasks

Task Description	Responsibility	Estimated Duration (Days)
Pre-implementation Preparation Activities		
Prepare Wireless Infrastructure	ICBS-R	
Submit Facility Info for Wireless Site Survey	Cache	3-10
Develop Wireless Site Survey from Info Submitted by Cache Personnel	ICBS-R	5-10
Schedule and Perform Wireless Site Survey	ICBS-R	1-5
Complete WLAN Plan	ICBS-R	1-5
Install and Test WLAN	ICBS-R	3-10
Send scanning devices to Cache	ICBS-R	1
Install scanning devices on WLAN and test	ICBS-R	1-3
Configure and test Zebra Label printer(s)	ICBS-R	1-2
Collect zones and locations into master XLS, to include move in and move out sequencing	ICBS-R/Cache	1-2
Collect dedicated SKU locations into Dedicated SKU spreadsheet-ensure the location freezing or assignment of overflow zones to open locations, validate UOM, and items dedicated to a specific location	ICBS-R/Cache	1-2
Assign location quantity code to each location (based on number of items that can fit into a location-example Q 5) (quantity 5).	ICBS-R/Cache	4-6
Provide final location spreadsheet to Gomathi for the printing of complete batch of location labels. (1" x 3" or 3" x 6") Contact Boise to ship location and product labels to targeted cache 1-2 weeks prior to arrival	ICBS-R	1
Locate labels onto shelf storage locations	Cache	2-3
Enter complete inventory for each location into provided spreadsheet to include trackable items with their associated numbers. Again, validate inventory with associated dedicated location.	Cache	5-15
Provide information to Jeri for Local Suppliers and Local NFES items (initiated 3-4 weeks prior to implementation)	ICBS-R/Cache	10-20
Provide spreadsheets to Jung for testing and validation		
Complete Cache Implementation Readiness Checklist	Cache	1-4
Complete COOP/Business Resumption Plan for Cache	Cache	1-2
Verify hardware/software readiness	ICBS-R	1-2
Load validated spreadsheet information into training	ICBS-R	4-5

instance 4-5 days prior to training		
Perform Advance Preparation Team Activities		
Schedule Advance Preparation Team (3-4 SMEs Optimum)	ICBS-R	1
Confirm Cache Implementation Readiness	ICBS-R	1
Prepare Warehouse for Implementation		
Make any necessary inventory movements	Cache	1-3
Update inventory spreadsheet as necessary	Cache	1-2
Label all locations as necessary	Cache	1-3
Enter and Test Cache-specific Data for Migration/Input into training instance	ICBS-R	3-5 total
WMS task activity codes	ICBS-R	
WMS inv adjustment reason codes	ICBS-R	
Count configuration data	ICBS-R	
Devices (scanners, printers, scales, etc.)	ICBS-R	
Disposition codes and transition rules	ICBS-R	
Equipment	ICBS-R	
Inventory monitor, rules, constraints, etc.	ICBS-R	
Storage zones and locations	ICBS-R	
Receiving preferences	ICBS-R	
Packing strategy	ICBS-R	
WLS PLA configuration	ICBS-R	
Putaway strategy	ICBS-R	
Queue subscription configuration	ICBS-R	
Retrieval strategy	ICBS-R	
Dedicated location configuration	ICBS-R	
WMS tasks configuration	ICBS-R	
Users/group setup	ICBS-R	
Item data specific to node	ICBS-R	
Cache inventory	ICBS-R	
Perform Training Activities		
Schedule Cache Staff w/ Cache Mgr	ICBS-R	1
Schedule Admin Staff for Training (configurator)	Cache	1
Schedule Warehouse Staff for Training	Cache	1
All cache personnel will be present for training in all the training modules-28 PowerPoint and Labs		
Schedule ICBS-R Staff		
Schedule Lead Instructor	ICBS-R	1
Schedule module instructor(s)	ICBS-R	1
Send instruction materials/equipment to training site	ICBS-R	1
Make activity level "go/no-go" decision for implementation	ICBS-R/ Cache	0
Conduct User Training		
Admin staff training	ICBS-R	6-8 total

Warehouse staff training	ICBS-R	6-8 total
Use of ICBS	ICBS-R	
Use of scanning devices	ICBS-R	
Go live with ICBS	ICSB-R/ Cache	0
Build up kits and process on hold business in production instance		1
Set up User groups and user permissions in production instance		

Appendix H:

Security Rules of Behavior

Rules of Behavior Guidelines:

- The ICBS system is hosted by the USDA National Information Technology Center (NITC), and is officially “owned” by the Forest Service. In order to comply with department and agency security policies, each user of the system is required to read and sign a “Rules of Behavior” (ROB) document when initially trained, and thereafter on an annual basis.
- Their level of access and who they are employed by will determine which ROB a user signs as their agreement to follow the rules of behavior.
- There are currently four (4) versions of the ROB:
 - FS_6600_5 (for those having access to sensitive information)
 - FS_6600_6 (for “Associate” users of the system, such as volunteers, non-FS agency employees, contractors, etc.)
 - FS_6600_7 (for FS employees)
 - FS_6600_8 (for those with “privileged access to the system)
- All of these documents are posted on the “Training” page of the ICBS-R website (<http://icbs.nwcg.gov/Training.html>).
- Administration of this activity is with the Unit ICBS Cache System Administrator. Copies of all signed ROB's shall be maintained locally by the Cache System Administrator.
- Termination of an ICBS user is the responsibility of the Cache System Administrator for the specific unit.
- Personnel transfer is the responsibility of the Cache System Administrator at each unit.
- Periodic security information is reviewed with users by unit security officers (i.e. at any time, an agency security officer may request current copies of signed ROB documents and compare them with the user accounts, and may ask to review access procedures with the Cache System Administrator).