



March 12, 2013

**To:** Cal Fire, California Emergency Management Agency (Cal EMA) and CA ROSS Dispatch Centers

**From:** Incident Qualification System (IQS) and Resource Ordering and Status System (ROSS)

**Subject:** Transitioning California Agencies to Using IQSweb

The purpose of this memo is to describe upcoming changes that will be occurring in California for those agencies that currently or plan to use the Incident Qualification System (IQS) and the Resource Ordering and Status System (ROSS). Currently in California there are two methods for getting resource records into ROSS:

1. **ROSS Interface** - Directly enter resource information into ROSS. The system of record (SOR) in ROSS for those resources entered directly into ROSS is **ROSS**. ROSS resources have a resource clearinghouse id that ensures uniqueness between resources within ROSS that are owned by other systems such as IQS or IQCS.
2. **IQS Legacy Import** - Export resource information from IQS as a file and then upload this file into ROSS using the ROSS interface. Uploading records exported from IQS into ROSS is performed by the agency if they have ROSS access or by their dispatch center. The SOR in ROSS for resources imported into ROSS using the IQS legacy import is **IQS**. IQS resources entered using the legacy import do not have a resource clearinghouse id since this method was employed before the clearinghouse existed.

***Due to changes in technology, the IQS Legacy Import method will be discontinued on March 18, 2013.*** IQSweb 2.0 and higher has the capability to use web methods to communicate directly between IQS and ROSS for synchronizing resource information. IQS resources are registered and given a resource clearinghouse id using this method. This function, called IQSweb ROSS Management, is being used by all states with the exception of California. California is the last state to complete this transition because of the number and agency diversity of its IQS and ROSS users. After March 18, 2013 there will *still* be two methods for getting resources into ROSS. They will be:

1. **ROSS Interface** - Directly enter resource information into ROSS as described above. Resources entered directly into ROSS will have a system of record (SOR) of ROSS.
2. **IQSweb ROSS Management** - Use IQSweb V3.0.1 to communicate directly with ROSS to update resources. The SOR in ROSS for resources updated using IQSweb ROSS Management is **IQS** and those resources have a clearinghouse ID.

#### **What does this mean for you?**

1. If your agency currently enters resource information directly into ROSS you will see no changes. You will not need to take any action **unless** you plan to start using IQSweb and use the IQSweb ROSS Management interface. This document outlines the details of this transition.
2. If your agency uploads resource information from IQS to ROSS via the IQS Legacy Import method, you will no longer be able to use this method as of March 18, 2013. All IQS resources that have been imported using the IQS Legacy Import will have their SOR in ROSS changed from IQS to ROSS as of March 18, 2013. This will allow the ROSS support team to merge the records



that were imported using the legacy method with those that will be registered and updated using IQSweb ROSS Management. More specifically:

- a. All CA ROSS resources with a System of Record (SOR) of IQS that **do not** have a Resource Clearinghouse ID (RCID) will have their SOR changed from IQS to ROSS by the ROSS team.
  - b. All resource records that are uploaded to ROSS using IQSweb ROSS management will go through the resource clearinghouse. The purpose of the clearinghouse is to check to make sure that resource is not already in ROSS (a duplicate) and assigned to another agency or system of record. The clearinghouse will also check to make sure the resource record contains key information required for all ROSS records (name, employment type, jet port etc.) before the record is accepted into ROSS.
  - c. The legacy resources will need to either be merged with those registered using the new process or deleted.
3. Please follow the steps outlined on the following pages to transition to the new IQSweb ROSS Management interface.



## Agency Steps to Transition to IQSweb and the ROSS Management Interface

1. Install or upgrade to IQSweb version 3.0.1 so that you have the latest version of IQSweb installed. Software installation and documentation for IQSweb are available at [www.vdatasys.com](http://www.vdatasys.com)
2. Ensure you have downloaded **IQSweb Reference G - ROSS Migration/Registration** from [www.vdatasys.com](http://www.vdatasys.com) as it contains the details necessary to complete the following steps.
3. Once you have IQSweb V3.0.1 installed, you can begin preparing the individuals in your IQSweb database to be sent to ROSS. This may take a significant amount of time depending on the number of persons you plan to send to ROSS. Detailed instructions can be found in the IQSweb Help documentation. Click the **Help** link located in the upper right or lower left on any IQSweb page after logging in. In the Help contents, open the folder **ROSS**, then open the folder **ROSS Management**. Click on the page "Identifying ROSS Resources in IQSweb". If you are not familiar with the ROSS Management process, it is suggested that you read through all the help pages under the folder ROSS Management. *This step can be performed independently from steps 4 - 10, but should be completed prior to step 11.*
4. IQSweb users who will be responsible for moving records from IQSweb to ROSS will need a ROSS user account. In addition to the basic user rights the user will need additional rights granted to them by their specific ROSS dispatch center. See **Reference G, ROSS User Accounts** for more details for the type of access required for new and existing ROSS user accounts. *This step can be performed independently from steps 5- 7, but should be completed prior to step 8.*
5. Test Agency Network Connectivity to ROSS.
  - a. See **Reference G, Test Agency Network Connectivity to ROSS** for specific details on how to do this. If the ROSS connectivity test passes proceed to the next step. If the test does not pass you will need to create a firewall exception. Specific details along with a sample justification request for your agency's IT department are also included in **Reference G**. *This test must be passed before proceeding to step 6 – Requesting a ROSS security certificate.*
6. Email request for ROSS security certificate to the ROSS Help Desk. Requests may be sent to the ROSS help desk beginning March 25, 2013. Directions for the email request and content are outlined in **Reference G, ROSS Interface Migration, Step 2**.
  - a. Standard cutover times are Tuesday and Thursday mornings. When agencies submit their security certificate requests to the ROSS help desk, the ROSS operations team will schedule the cutover for the next available slot. Those slots are filled on first come first serve basis. The ROSS operations team will respond back with your scheduled cutover date with a 3 day lead time. Cutover process will begin March 26, 2013.
  - b. Priority will be given for California agencies cutover requests until April 30, 2013. After April 30<sup>th</sup>, requests will be prioritized along with the other help desk requests on a national basis.



7. Install the ROSS SSL Security Certificate. On the scheduled cutover date you will receive instructions on how to obtain the ROSS SSL Certificate. The certificate cannot be installed prior to the cutover date. See **Reference G, Installing the ROSS SSL Certificate** for specific instructions.
8. Register your IQSweb system with ROSS by following the steps in **Reference G, ROSS Registration**.
9. **Run SQL script to disable ROSS preregistration** process - A majority of IQS users converted to ROSS management in 2010. At that time users were allowed to “pre-register” their resources with the Resource Clearinghouse. This option is no longer available. An SQL script must be run against your IQSweb database to disable preregistration. Follow the steps in **Reference G, Disable Pre-Registration Script** to run this script.
10. **Synchronize IQSweb with ROSS**. This step will require you to work closely with your ROSS dispatch center and the Resource Clearinghouse data stewards to resolve duplicate resources and merge like resources (See steps 10 and 11 below). Follow the steps in **Reference G, Synchronize IQSweb with ROSS**.
11. CA units that used the legacy IQS import method, and are now using IQSweb, will need their dispatch centers to delete or merge records to manage duplicates following these steps:
  - a. In ROSS open the Resource Item screen, highlight the record to be removed and select the Remove Overhead Icon. Remove all records that will eventually be imported from IQSweb.
  - b. Select the Manage Overhead Resources icon, and delete all the records that have no reference.
  - c. After the IQSweb records are imported some duplicate records may remain in the removed bin (Manage Overhead Resources screen). If this is the case, restore the record back into ROSS from the Manage Overhead Resources screen. Open the Merge Resource screen and merge the record with the SOR of ROSS into the IQSweb record. This will preserve the history attached to the ROSS record.
12. CA units that previously entered records directly into ROSS and are transitioning to IQSweb (i.e. records already exist in the Resource Clearinghouse), the dispatch center will need to REMOVE those records from ROSS in order to prepare for merging in the Resource Clearinghouse following these steps:
  - a. In ROSS open the Resource Item screen, highlight the record to be removed and select the Remove Overhead Icon. Remove all records that will eventually be imported from IQSweb.
  - b. Select the Manage Overhead Resources icon, and delete all the records that have no reference. The Clearinghouse Data Steward will merge these records with the IQSweb records.

**Remember, as of March 18, 2013 the legacy ROSS import method will be discontinued. We encourage you to start planning for this change now so your agency will have a smooth transition.**



Specific questions can be directed to your IQS support team. Contact information is available at [www.vdatasys.com](http://www.vdatasys.com).