

EMRS Quick Start Guide for 213RR Resource Requests



There are two types of 213RR Resource Requests created in EMRS:

- 1) Master 213RR Resource Request
- 2) 213RR Resource Request

The ability to perform the tasks described below is dependent on user roles. Only individuals with the Logistics Chief or Plans Chief role can create a Master 213 Resource Request. Once a master request and a starter/sample request have been created for an incident, all users with access to the incident/site can submit a 213RR Resource Request. A submitted 213RR progresses through several steps to record approval, ordering, and completion of the request. 213RR Resource Requests are approved and orders are completed by different personnel on an incident.

Resource Requests

213RR Resource Request information is stored in the Master 213RR's entity and the 213RR Resource Requests entity. The Logistics Chief at an Incident creates Master 213RR's that set the approval requirements for each type of resource request on an incident. Incident team members submit 213RR Resource Requests based on the master requests. A submitted 213RR progresses through several steps to record approval, ordering, and completion of the request.

Supply Request Tasks

- 1) Create Master 213RR Resource Requests and Starter/Sample 213RR's (p. 1)
- 2) Submit a 213RR Resource Request (p. 7)
- 3) Process a 213RR Resource Request (p. 9)

1. Create Master 213RR Resource Requests and Starter/Sample 213 RR's

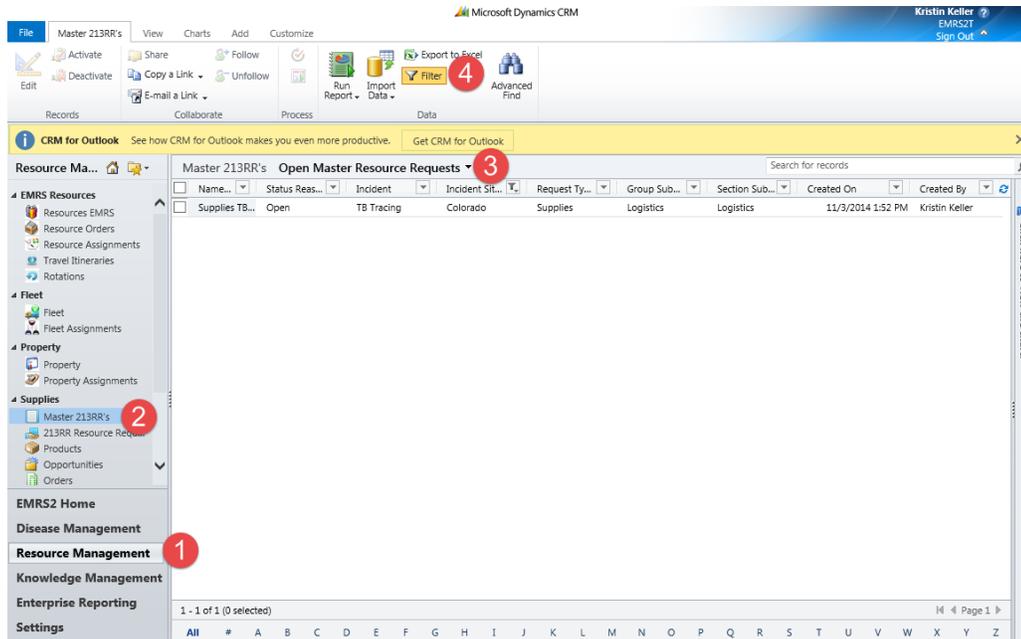
The Logistics Chief creates Master 213RR Resource Requests. Depending on the incident, the Logistics Chief may create one or more Master 213 RR's. Separate Master 213RR's can be created to allow requests for supplies, equipment, fleet, personnel, and other. *Note: a 213RR for personnel is a pre-ordering request for approval, which allows each section to submit personnel requests for an overall staffing plan prepared by Plans, which when approved by the Incident Commander, goes to Logistics for the creation of actual Resource Orders.* The Master 213RR sets the approval requirements for each type of request. After a Master Resource Request is created, the Logistics Chief creates a starter/sample 213RR Resource Request so that users can submit requests for resources for the incident.

Master 213RR Resource Request

The Master 213RR Resource Request sets the approval requirements for each type of request. To create a Master 213RR, navigate to the Master Supply Request entity.

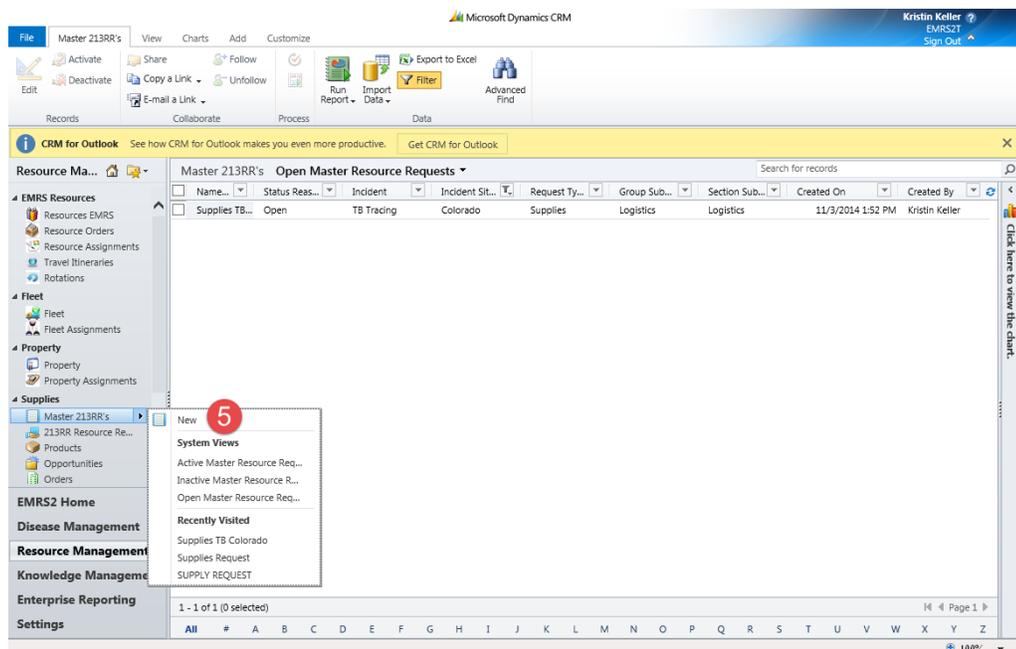
- 1) Select Resource Management.
- 2) In the Supplies section, select Master 213RR's.
- 3) Verify that Open Master Resource Requests are displaying in the view. Use the drop-down to select Open Master Resource Requests if they are not displayed.
- 4) If desired, filter the display to show only Master 213RR's for your incident and site.

Master 213RR's



- 5) Select New from the Master 213RR's fly out.

New Master 213RR



The Master 213RR form will open. Fill in the boxes with the appropriate information as shown below. Fields with a red asterisk are required. (See the screen shot on page 4.)

Request

- Incident = Incident
- Incident Site = Incident site
- Request Type = Select the request type from the drop down menu (choices are Personnel, Fleet, Equipment, Supplies, Other)
- Name = Enter a name for the request. It is recommended you name the request clearly to assist users in selecting the appropriate type when they are submitting requests (for example, Supplies, Fleet). If you do not enter a name, EMRS will assign a unique system name/number to the request.
- Access Group = Access group will default to your name. You must change the access group to the appropriate access group for your incident. **Usually, this will be the incident site.**

To change the access group, select the Look Up icon  for the Access Group field. The Look Up Record pop up will open. Change Look for: to Team. Use the Search box to search for the appropriate access group (usually the incident site state). Select the Team Name. Select OK.

Look Up Record
 Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Team
 View: Owning Teams Lookup View
 Search: Colorado

Team Name	Business Unit	Team Purpose
<input checked="" type="checkbox"/> Colorado	Colorado	Own Documents

1 - 1 of 1 (1 selected) Page 1

Properties New

OK Cancel Remove Value

Approvals Required

- Incident Command Approval = Enter the dollar amount, if any, that requires Incident Command approval and/or notification.
- Finance Section Approval = Enter the dollar amount, if any, that requires Finance Section approval and/or notification.
- Requesting Section Approval = Use the drop down menu to select if requesting section approval and/or notification is required.
- Section Submitted To = Use the drop down menu to select the section and group the request is submitted to fill the order.

6) Select Save.

Master 213RR

The screenshot displays the Microsoft Dynamics CRM interface for a Master 213RR record. The record is titled 'Fleet TB Colorado' and is categorized as a 'Request'. The form includes several sections: 'Request' with fields for Incident (TB Tracing), Incident Site (Colorado), and Request Type (Fleet); 'Approvals Required' with sub-sections for Incident Command, Finance Section, and Requesting Section, each containing 'Requires Approval' and 'Requires Notification' fields with monetary values; and 'Section Submitted To' with dropdowns for Section Submitted (Logistics) and Group Submitted to (Logistics). The status is 'Active' and the status reason is 'Open'. The ribbon at the top shows options like Save, Deactivate, Sharing, Copy a Link, E-mail a Link, and Run Report.

You can create additional Master 213RR's for additional request types (Personnel, Fleet, Equipment, Supplies, Other) as needed for the incident. *Reminder: a 213RR for personnel is a pre-ordering request for approval, which allows each section to submit personnel requests for an overall staffing plan prepared by Plans, which when approved by the Incident Commander, goes to Logistics for the creation of actual Resource Orders.*

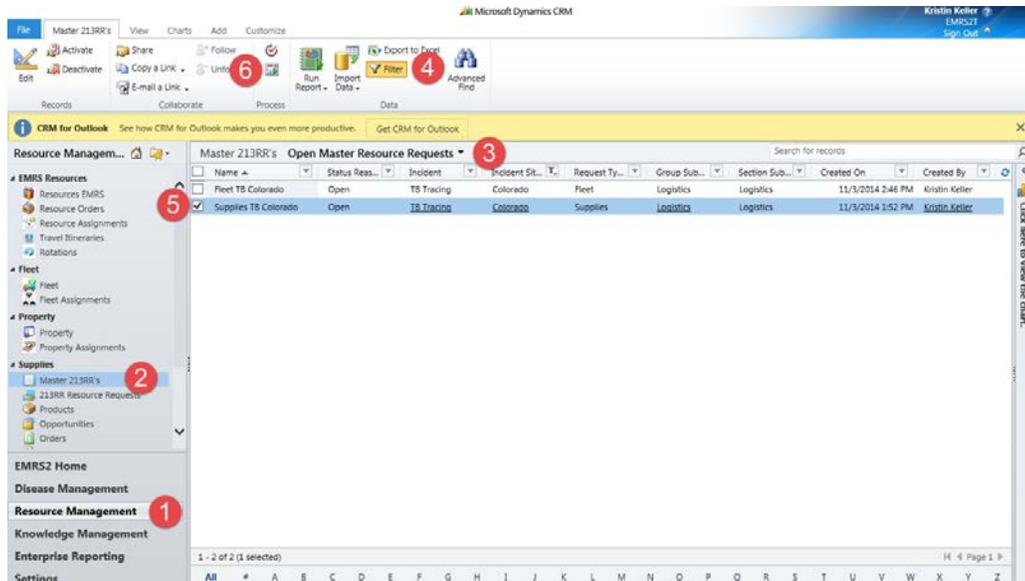
Starter 213RR Resource Request

A starter 213RR Resource Request makes it easy for users to find and submit resource requests for the correct incident, site, and request type. You can create a starter request from the master you just created. If you have created multiple master requests (for supplies, fleet, etc.), you can create a starter request for each master.

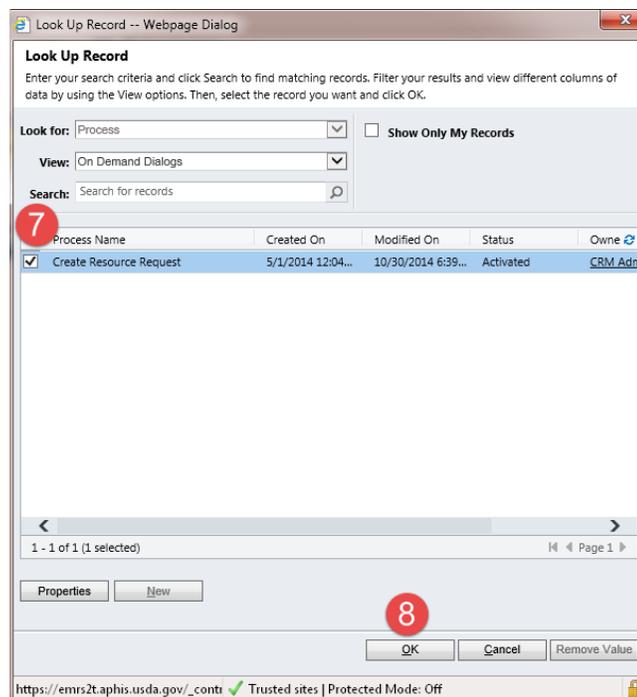
To create a starter 213RR Resource Request from a Master request, navigate to the Master 213RR's entity.

- 1) Select Resource Management.
- 2) In the Supplies section, select Master 213RR.'s
- 3) Verify that Open Master Resource Requests are displaying in the view. Use the drop-down to select Open Master Resource Requests if they are not displayed.
- 4) If desired, filter the display to show only Master 213RR's for your incident and site.
- 5) Highlight the Master Resource Request for which you want to create a starter 213RR Resource Request. You do not need to open the form.
- 6) Select the Dialog icon  in the ribbon.

Master 213RR's



- 7) Select the Create Resource Request dialog.
- 8) Select OK.



- 9) Complete the Create Resource Request dialog to create a sample request. The best way to indicate that this is a sample request is to indicate that in the Description field of the dialog.

Create Resource Request Dialog

Create Resource Request
Create a new request

Create a new resource request for (Supplies) on the incident (TB Tracing) at the site (Colorado) and submit to the section (Logistics ; Logistics)

Request Date
11/4/2014

Section Requesting
Incident Command

For pick up or delivery?
Pick-up

Requested Pick Up/ Delivery timeframe
Today

Requested Pick-up or delivery

Click to add comments

Help Summary Next Cancel

Create Resource Request
Requested

Requested for which resource?
IMT

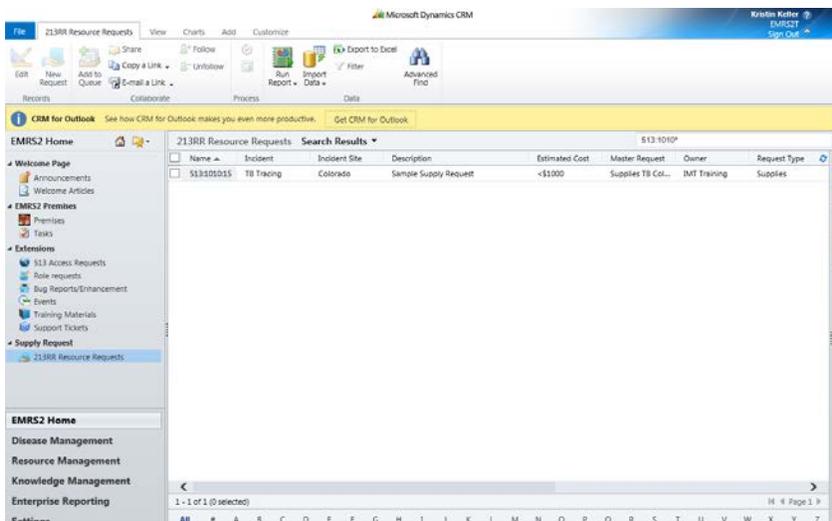
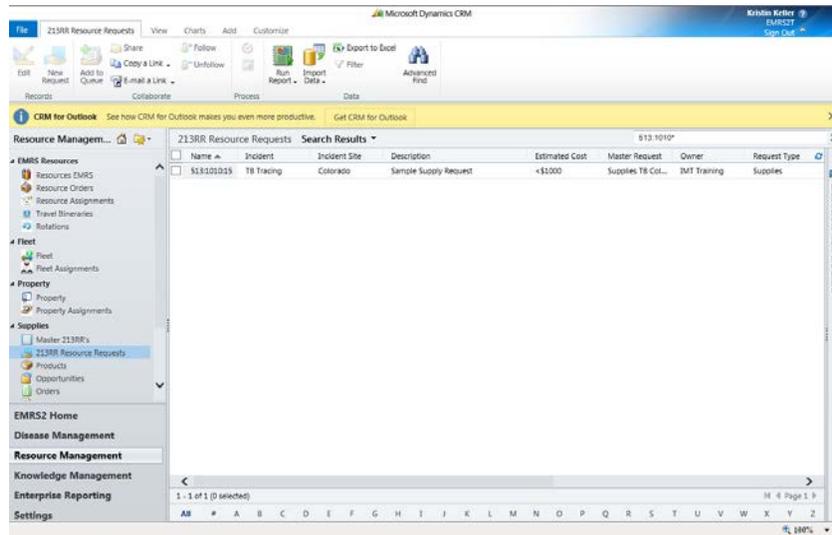
Description of Items requested-required!
Sample Supply Request

Estimated Cost
< \$1000

Click to add comments

Help Summary Previous Next Cancel

The starter/sample 213RR Resource Request will appear in both Resource Management > Supplies > 213RR Resource Requests and EMRS2 Home > Supply Request > 213RR Resource Requests.



2. Submit a 213RR Resource Request

After a Master 213RR and starter 213RR Resource Request have been created by the Logistics Chief, users can then submit 213RR Resource Requests. Masters may be created to allow requests for supplies, equipment, fleet, personnel, and other. *Note: a 213RR for personnel is a pre-ordering request for approval, which allows each section to submit personnel requests for an overall staffing plan prepared by Plans, which when approved by the Incident Commander, goes to Logistics for the creation of actual Resource Orders.*

To submit a 213RR resource request, navigate to the 213RR Resource Requests entity.

- 1) Select EMRS2 Home.
- 2) In the Supply Request section, select 213RR Resource Requests.
- 3) Verify that Active Resource Requests are displaying in the view. Use the drop-down to select Active Resource Requests if they are not displayed.
- 4) If requests are displaying for more than one incident and/or site, filter to display only 213RR's for your incident and incident site. You may also filter on specific request type (supplies, equipment, fleet, etc.).
- 5) Highlight an existing 213RR in the grid. This will activate the New Request button in the ribbon. *Note: if there is a **sample** request displaying, select this. If there are multiple samples displaying, select the sample for the type of request (supplies, equipment, fleet, etc.) you are making. If there are no sample requests, select any request in the grid.*
- 6) Select the New Request button.

New 213RR Resource Request

The screenshot displays the Microsoft Dynamics CRM interface for the 213RR Resource Requests entity. The ribbon at the top contains various actions, with 'New Request' (6) and 'Filter' (4) highlighted. The left-hand navigation pane shows the 'EMRS2 Home' (1) and 'Supply Request' > '213RR Resource Requests' (2) path. The main view area shows a table of 'Active Resource Requests' (3) with columns for Incident, Incident Site, Request Type, and Description. A table row is highlighted (5).

	N...	Status Reas...	Incident	Incident Sit...	Request Ty...	Pickup or D...	R...	Requested...	Description
<input checked="" type="checkbox"/>	5131...	Submitted	T8 Tracing	Colorado	Supplies	Pickup		Today	Sample Supply Request
<input type="checkbox"/>	5131...	Submitted	T8 Tracing	Colorado	Supplies	Pickup		Today	Sprayer
<input type="checkbox"/>	5131...	Submitted	T8 Tracing	Colorado	Supplies	Pickup		Today	Sprayer
<input type="checkbox"/>	5131...	Submitted	T8 Tracing	Colorado	Supplies	Pickup		Today	Tyvek

7) Complete the Create Resource Request dialog. The dialog has three options:

- Create a request for the same incident, site, and type of items (supplies, equipment, etc.) as the highlighted request. *Note: the Tip on the dialog screen displays the current incident and site. **IN MOST CASES, YOU SHOULD USE THIS OPTION.***
- Create a new request for the incident and site. This will retain the incident and site, but allow you to choose the type of item requested (supplies, equipment, etc.). *Note: You will only be able to choose a request type for which a Master 213RR has been created for your incident.* Use this option if you have selected an item in the grid for a different type of resource (supplies, equipment, etc.) and you know a Master 213RR exists for the type of resource you are requesting.
- Create a new request for a new incident. This will allow you to choose the incident, incident site, and type of item being requested. *Note you will only be able to choose a request type for which a Master 213RR has been created for your incident.* Only use this option if this is the first 213RR being submitted for your incident and site and no starter/sample 213RR was created for your use.

Create Resource Request Dialog

Create Resource Request
Create a new request

Take which action?

Create a request for same incident, site and type items. 7

Create a new request for incident & Site.

Create a new request for new incident.

Tip

Incident: [TB Tracing](#)
Site: [Colorado](#)

Click to add comments

Help
Summary
Next
Cancel

After completing the dialog, the 213RR Resource Request will appear in the Active Resources Request grid in Submitted status. The request is now ready for processing.

Active Resource Requests

	N...	Status	Reas...	Incident	Incident Site	Request Ty...	Pickup or D...	R...	Requested...	Description
<input type="checkbox"/>	5131...	Submitted		TB Tracing	Colorado	Supplies	Pickup		Today	Tyvek
<input type="checkbox"/>	5131...	Submitted		TB Tracing	Colorado	Supplies	Pickup		Today	Sprayer
<input type="checkbox"/>	5131...	Submitted		TB Tracing	Colorado	Supplies	Pickup		Today	Sprayer
<input type="checkbox"/>	5131...	Submitted		TB Tracing	Colorado	Supplies	Pickup		Today	Sample Supply Request
<input checked="" type="checkbox"/>	5131...	Submitted		TB Tracing	Colorado	Supplies	Pickup		Today	10 Laminated Wall Charts

3. Process a 213RR Resource Request

A submitted 213RR progresses through several stages to record approval, ordering, and completion of the request. The number and type of approvals that are required for a resource request are set in the Master 213RR's for an incident. Not all stages described here will be required for every 213RR.

- Stage 1 – Submitted Requests (p. 9)
 - Stage 1a – Pending Section Approval
 - Stage 1b – Pending Finance Approval
 - Stage 1c – Pending IC Approval
- Stage 2 – Pending Orders (p. 15)
 - Stage 2a – Ordered
- Stage 3 – Completed Resource Requests (p.18)
 - Stage 3b – Cancelled Resource Requests

Stage 1 – Submitted Requests

All 213RR's are first set to Submitted status. All Submitted orders must be processed. To view and process a submitted request, navigate to the 213RR Resource Requests entity.

- 1) Select EMRS2 Home.
- 2) In the Supply Request section, select 213RR Resource Requests.
- 3) Verify that Stage 1 – Submitted Requests is displaying in the view. Use the drop-down to select Stage 1 – Submitted Requests if it is not displayed.
- 4) If requests are displaying for more than one incident and/or site, filter to display only 213RR's for your incident and incident site.
- 5) Open the 213RR Resource Request form you wish to process. You can open the form in one of two ways:
 - Select the number displayed in the Name column of the grid
 - Select the box next to the item so that the item is highlighted. Select Edit in the ribbon.

Stage 1 – Submitted Requests

Microsoft Dynamics CRM

Kristin Keller
EMRS2T
Sign Out

213RR Resource Requests

5

4

CRM for Outlook

EMRS2 Home

213RR Resource Requests Stage 1 - Submitted Requests

Name	Status	Reas...	Incident	Incident Sit...	Request Ty...	Pickup or D...	R...	Requested...	Description
513:1007:15	Submitted		TB Tracing	Colorado	Supplies	Pickup		Today	Tyvek
513:1008:15	Submitted		TB Tracing	Colorado	Supplies	Pickup		Today	Gloves
513:1009:15	Submitted		TB Tracing	Colorado	Supplies	Pickup		Today	Sprayer
513:1010:15	Submitted		TB Tracing	Colorado	Supplies	Pickup		Today	Sample Supply Request
513:1011:15	Submitted		TB Tracing	Colorado	Supplies	Pickup		Today	10 Laminated Wall Charts

1

2

3

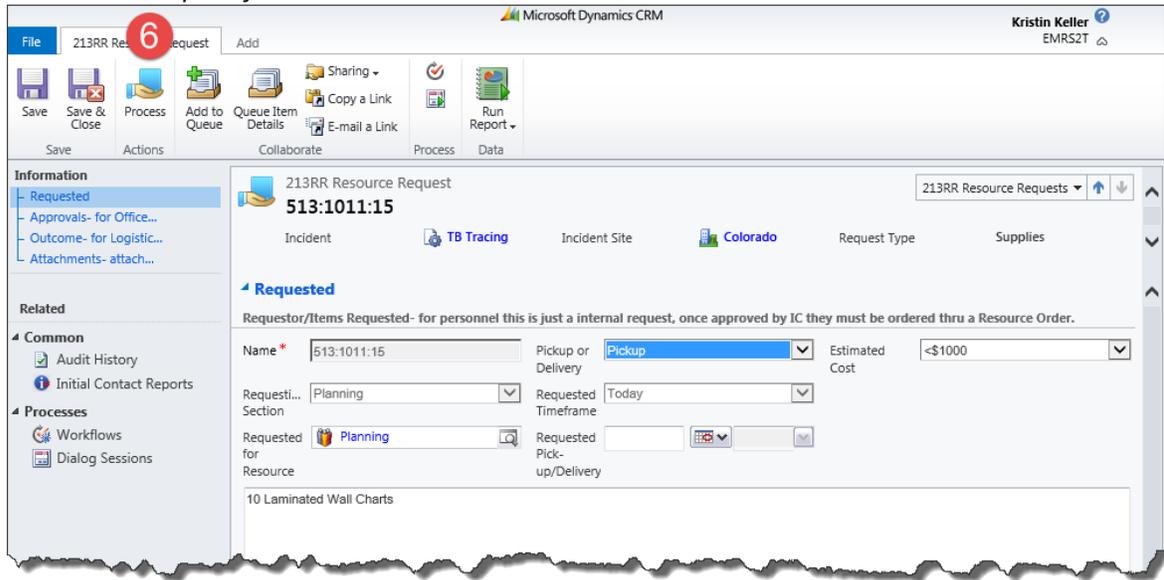
5

1 - 5 of 5 (1 selected)

Page 1

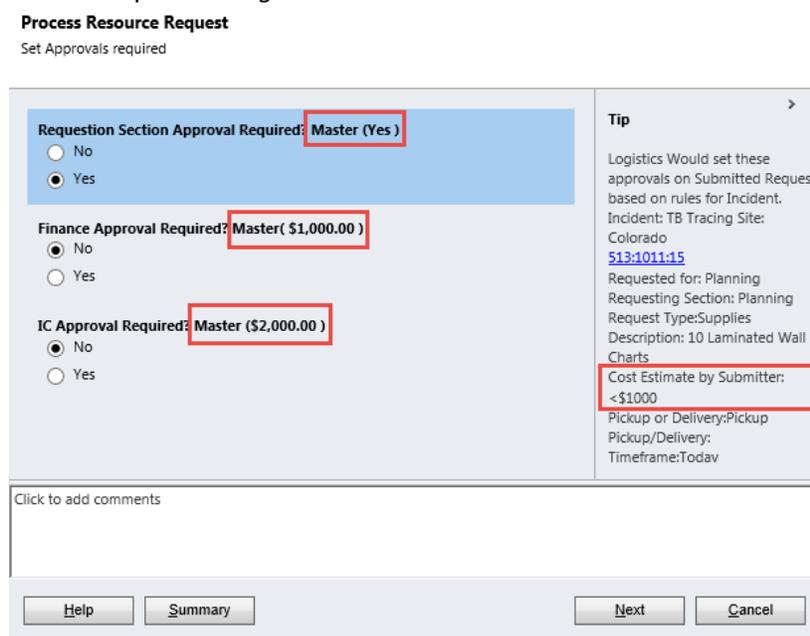
6) The 213RR Resource Request form will open. Select Process in the ribbon.

213RR Resource Request form



7) Complete the Process Resource Request dialog. Select the appropriate radio buttons for the levels of approval required. The Master 213RR specifies the approvals needed based on the rules of the incident. These requirements display in the dialog. The estimated dollar amount displays in the Tip.

Process Resource Request Dialog



At the end of the dialog, a success message indicating the completed processing stage will display.

Pending Order

The resource request [513:1001:15](#) has been processed to (Pending Order) and can be further processed by the responsible party.

Pending Section Approval

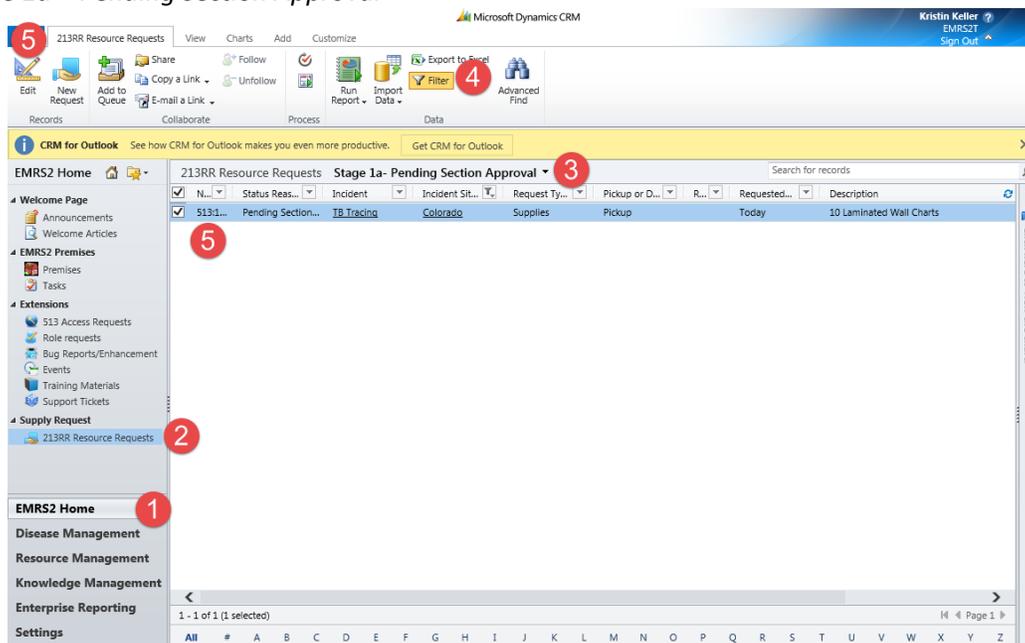
The resource request [513:1011:15](#) has been processed to (Pending Section Approval) and can be further processed by the responsible party.

Stage 1a – Pending Section Approval

To process a request requiring section approval, navigate to 213RR Resource Requests entity.

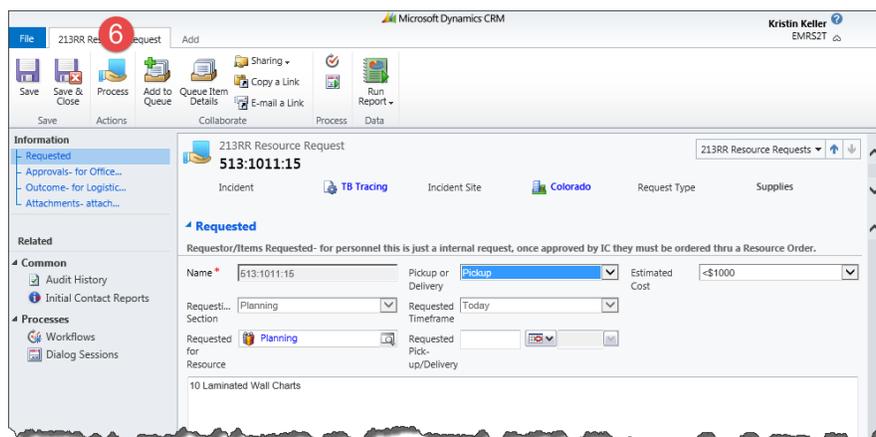
- 1) Select EMRS2 Home.
- 2) In the Supply Request section, select 213RR Resource Requests.
- 3) Verify that Stage 1a – Pending Section Approval is displaying in the view. Use the drop-down to select Stage 1a – Pending Section Approval if it is not displayed.
- 4) If requests are displaying for more than one incident and/or site, filter to display only 213RR's for your incident and incident site.
- 5) Open the 213RR Resource Request form you wish to process. You can open the form in one of two ways:
 - Select the number displayed in the Name column of the grid
 - Select the box next to the item so that the item is highlighted. Select Edit in the ribbon.

Stage 1a – Pending Section Approval



- 6) The 213RR Resource Request form will open. Select Process in the ribbon.

213RR Resource Request form



- The Process Resource Request dialog will open. Complete the dialog to approve, modify, or disapprove the request.

Process Resource Request Dialog

Process Resource Request
Approve

At the end of the dialog, a success message indicating the completed processing stage will display.

Pending Order

The resource request selected [213:1002:15](#) has been processed with the action (Approved as Requested) by (BRIAN ARCHER) from the section Incident Management) and now has a status of (Pending Order).

Pending Finance Approval

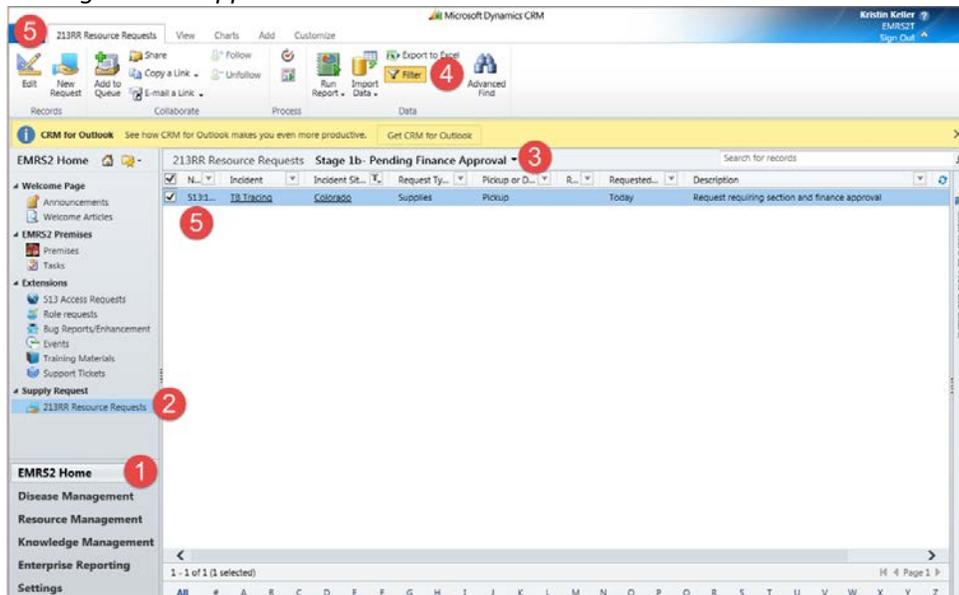
The resource request selected [513:1013:15](#) has been processed with the action Approve as Requested by (BRIAN ARCHER) from the section Incident Management) and now has a status of (Pending Finance Approval).

Stage 1b – Pending Finance Approval

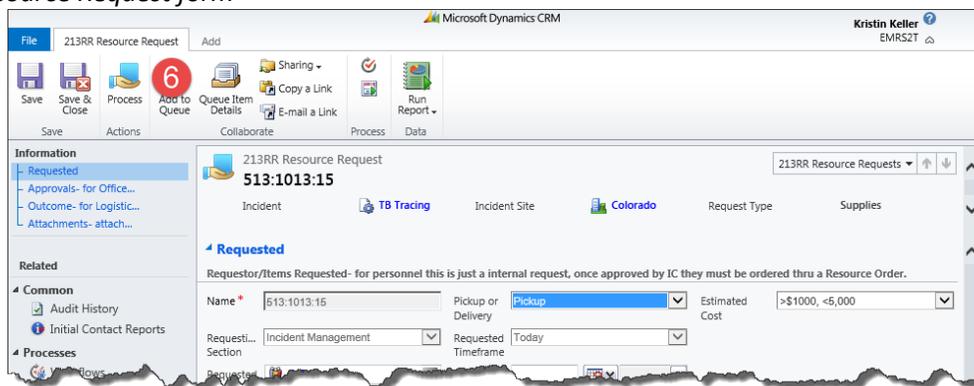
To process a request requiring finance approval, navigate to 213RR Resource Requests entity.

- Select EMRS2 Home.
- In the Supply Request section, select 213RR Resource Requests.
- Verify that Stage 1b – Pending Finance Approval is displaying in the view. Use the drop-down to select Stage 1b– Pending Finance Approval if it is not displayed.
- If requests are displaying for more than one incident and/or site, filter to display only 213RR’s for your incident and incident site.
- Open the 213RR Resource Request form you wish to process. You can open the form in one of two ways:
 - Select the number displayed in the Name column of the grid
 - Select the box next to the item so that the item is highlighted. Select Edit in the ribbon.

Stage 1b – Pending Finance Approval



- 6) The 213RR Resource Request form will open. Select Process in the ribbon.
213RR Resource Request form



- 7) The Process Resource Request Finance Approval dialog will open. Complete the dialog to approve, modify, or disapprove the request.

Process Resource Request Finance Approval Dialog

Process Resource Request
 Finance Approval

Indicate Finance Action

Approved as Requested
 Approved with Modifications
 Not Approved

Finance Action Date
 11/6/2014 11:53 AM

Finance Approver
 ELIZABETH NOLCOX

Approval/Rejection Comments- required if approved with modifications.

Click to add comments

Buttons: Help, Summary, Next, Cancel

At the end of the dialog, a success message indicating the completed processing stage will display.

Pending Order

The request 513:1013:15 was Approved as Requested by ELIZABETH NOLCOX on 11/6/2014 11:53 AM and now has a status of Pending Order.

Pending IC Approval

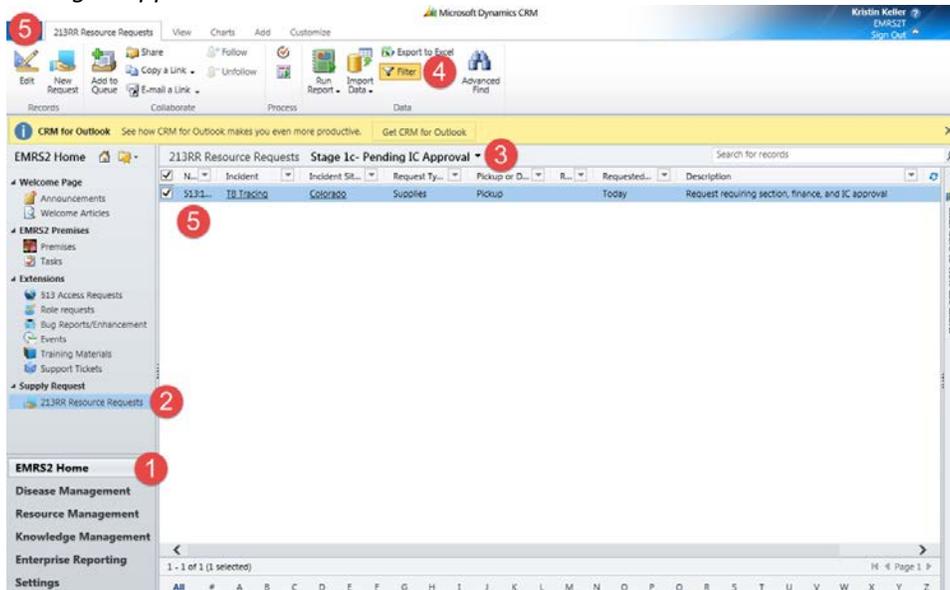
The request 513:1014:15 was Approved as Requested by ELIZABETH NOLCOX on 11/6/2014 12:00 PM and now has a status of Pending IC Approval.

Stage 1c – Pending IC Approval

To process a request requiring Incident Command approval, navigate to 213RR Resource Requests entity.

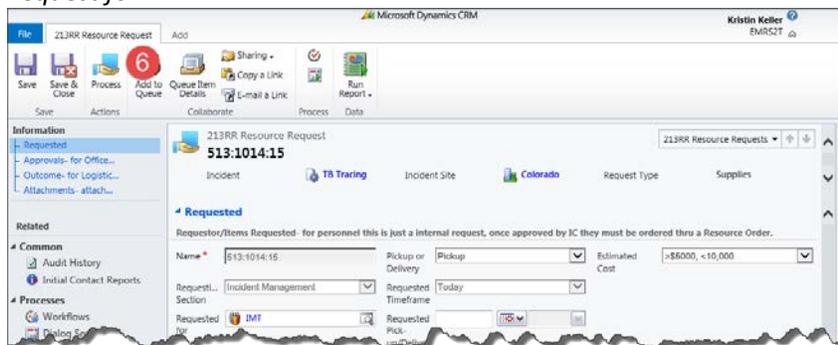
- 1) Select EMRS2 Home.
- 2) In the Supply Request section, select 213RR Resource Requests.
- 3) Verify that Stage 1c – Pending IC Approval is displaying in the view. Use the drop-down to select Stage 1c – Pending IC Approval if it is not displayed.
- 4) If requests are displaying for more than one incident and/or site, filter to display only 213RR's for your incident and incident site.
- 5) Open the 213RR Resource Request form you wish to process. You can open the form in one of two ways:
 - Select the number displayed in the Name column of the grid
 - Select the box next to the item so that the item is highlighted. Select Edit in the ribbon.

Stage 1c – Pending IC Approval



- 6) The 213RR Resource Request form will open. Select Process in the ribbon.

213RR Resource Request form



- 7) The Process Resource Request dialog will open. Complete the dialog to approve, modify, or disapprove the request.

Process Resource Request IC Approval Dialog
Process Resource Request
IC Approval

IC Action

Approved as Requested
 Approved with Modifications
 Not Approved

IC Action Date
11/6/2014 12:06 PM

IC Approver
KENNETH ANGEL

IC Approver Comments- required if Approved with Modifications

Click to add comments

Help Summary Next Cancel

At the end of the dialog, a success message indicating the completed processing stage will display.

Pending Order

The request [513:1014:15](#) now has a status of Pending Order.

If Pending Order it will be sent to the Pending Order view to be processed by Logistics Order Manager.

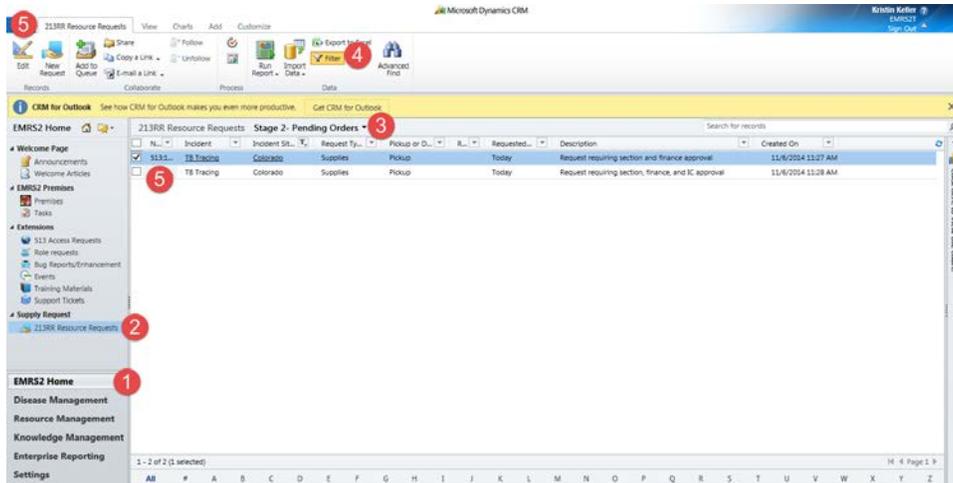
If Not approved it will be Cancelled and Completed.

Stage 2 – Pending Orders

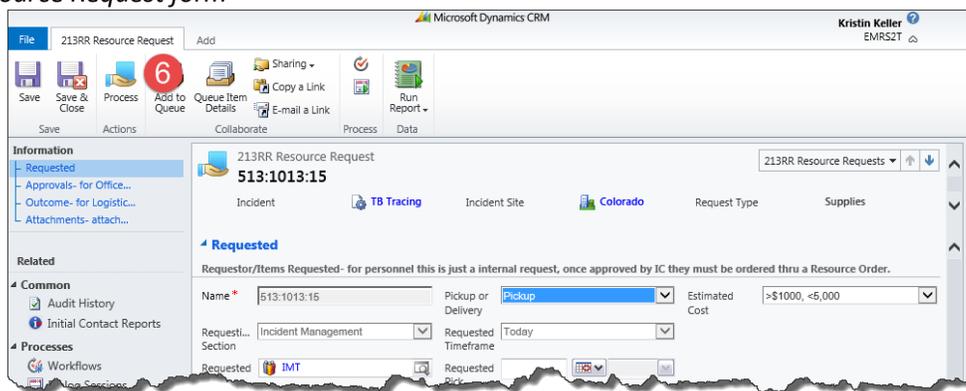
Once all required approvals have been completed, the 213RR is set to Pending Order status. To view and process a pending order request, navigate to the 213RR Resource Requests entity.

- 1) Select EMRS2 Home.
- 2) In the Supply Request section, select 213RR Resource Requests.
- 3) Verify that Stage 2 – Pending Orders is displaying in the view. Use the drop-down to select Stage 2 – Pending Orders if it is not displayed.
- 4) If requests are displaying for more than one incident and/or site, filter to display only 213RR's for your incident and incident site.
- 5) Open the 213RR Resource Request form you wish to process. You can open the form in one of two ways:
 - Select the number displayed in the Name column of the grid
 - Select the box next to the item so that the item is highlighted. Select Edit in the ribbon.

Stage 2 – Pending Orders



- 6) The 213RR Resource Request form will open. Select Process in the ribbon.
213RR Resource Request form



- 7) The Process Resource Request dialog will open. Complete the dialog to document the order. You can complete the order now or quit and return to the request to complete the order later (for example, if the item must be obtained from an outside vendor and has not yet been received).

Process Resource Request Order Dialog

Process Resource Request
Order?

Date Ordered- required
11/6/2014 2:46 PM

Actual Cost Estimate
250.00000

Ordered by: Usually Logistics Order Manager- required
LYNN CREEKMORE

Order Type
 In Stock
 Other Warehouse
 Outside Vendor
 Unable to Source

Click to add comments

Help Summary Next Cancel

Process Resource Request
Order Processing

The request 513:1013:15 now has status of Ordered.

What next?
 Quit I am done.
 Complete Order

Click to add comments

Help Summary Previous Next Cancel

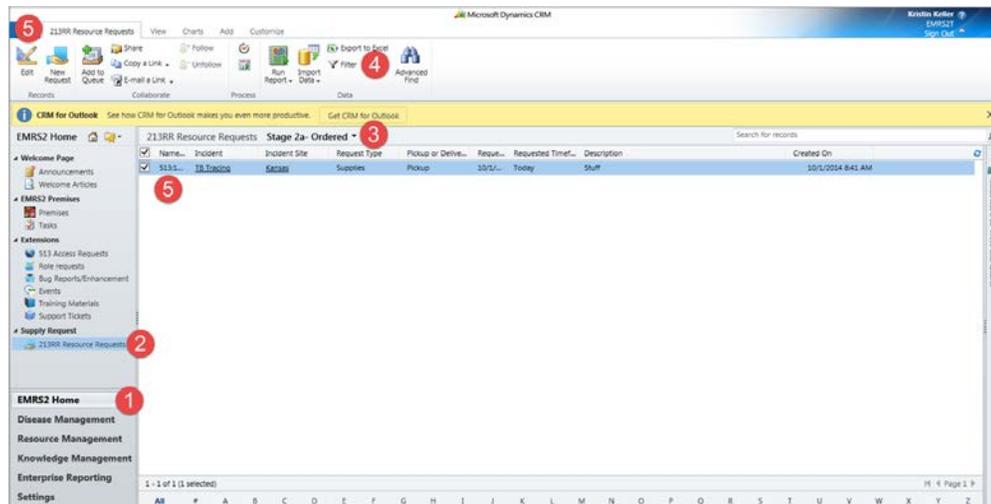
If you continue the order dialog by selecting Complete Order, the dialog will continue as shown in Stage 2a – Ordered. When the order is complete, the status is Complete.

Stage 2a – Ordered

If you continue the order dialog by selecting Complete Order, the dialog will continue as shown below. If the order dialog was closed and you are returning to the order to document its completion, navigate to the 213RR Resource Requests entity.

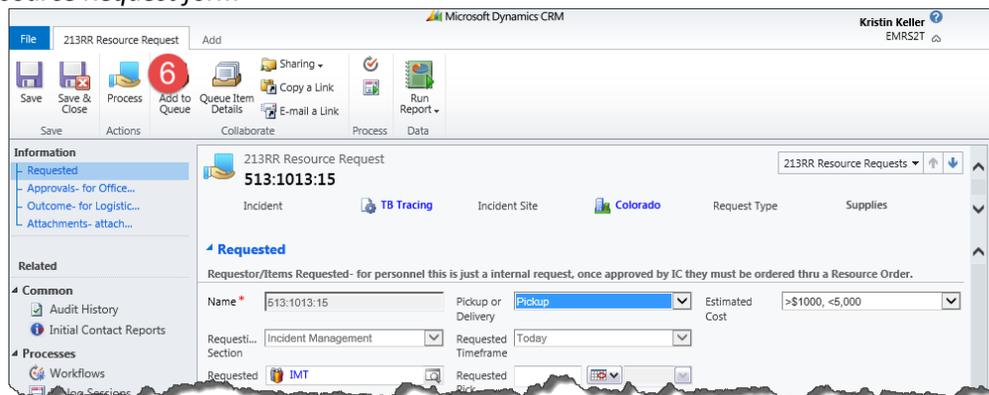
- 1) Select EMRS2 Home.
- 2) In the Supply Request section, select 213RR Resource Requests.
- 3) Verify that Stage 2a – Ordered is displaying in the view. Use the drop-down to select Stage 2a – Ordered if it is not displayed.
- 4) If requests are displaying for more than one incident and/or site, filter to display only 213RR's for your incident and incident site.
- 5) Open the 213RR Resource Request form you wish to process. You can open the form in one of two ways:
 - Select the number displayed in the Name column of the grid
 - Select the box next to the item so that the item is highlighted. Select Edit in the ribbon.

Stage 2a – Ordered



- 6) The 213RR Resource Request form will open. Select Process in the ribbon.

213RR Resource Request form



7) The Process Resource Request Complete dialog will open. Complete the dialog to document the order.

Process Resource Request Complete Dialog

Process Resource Request
Complete?

Date Completed: 11/6/2014 12:00 AM

Completed by: LYNN CREEKMORE

Outcome:
 Supplied as Ordered
 Supplied As Modified- see notes
 Not Needed

Click to add comments

Help Summary Next Cancel

When you finish the Complete Order dialog, the order has a status of Completed.

Completed Order

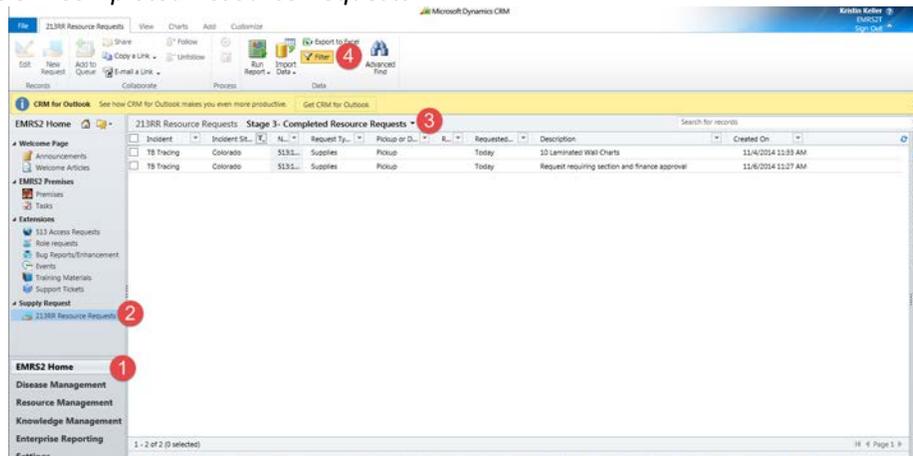
The 213 Resource Request [513:1013:15](#) now has a status of Completed and outcome of Supplied as Ordered.

Stage 3 – Completed Resource Requests

When orders are complete, they appear in Stage 3 – Completed Resource Requests. To view completed requests, navigate to the 213RR Resource Requests entity.

- 1) Select EMRS2 Home.
- 2) In the Supply Request section, select 213RR Resource Requests.
- 3) Verify that Stage 3 – Completed Resource Requests is displaying in the view. Use the drop-down to select Stage 3 – Completed Resource Requests is not displayed.
- 4) If requests are displaying for more than one incident and/or site, filter to display only 213RR's for your incident and incident site.

Stage 3 – Completed Resource Requests



Stage 3b – Cancelled Resource Requests

213RR Resource Requests can be cancelled at various stages. A request marked Not Approved at any stage (Section, Finance, or IC) is cancelled. A Pending Order completed as Unable to Source or Not Needed is cancelled. To view cancelled requests, navigate to the 213RR Resource Requests entity.

- 1) Select EMRS2 Home.
- 2) In the Supply Request section, select 213RR Resource Requests.
- 3) Verify that Stage 3b – Cancelled Resource Requests is displaying in the view. Use the drop-down to select Stage 3b – Cancelled Requests if it is not displayed.
- 4) If requests are displaying for more than one incident and/or site, filter to display only 213RR's for your incident and incident site.

Stage 3b – Cancelled Resource Requests

