UNIT 3

I-Suite Data Admin

5/1/2012

This Training Manual is for use with the 12.01.00 version of the I-Suite System.

TOTAL SUGGESTED TIME: 1 hour

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1. Manage lookup tables.
2. Add a new Kind to the Kind Codes Lookup table.

DETAILED LESSON OUTLINE

COURSE:	I-Suite
UNIT:	3.0 – Data Admin: Overview.
SUGGESTED TIME:	10 minutes
TRAINING AIDS:	Computer projector, screen, computer (one for instructor and one per trainee).
OBJECTIVES:	Upon completion of this unit, the trainee will be able to:

1. Identify the purpose of the Data Admin module.
2. Manage incident data.
3. Manage lookup tables.

OUTLINE	AIDS & CUES
INTRODUCE THE UNIT.	Instructor Comments
PRESENT UNIT OBJECTIVES.	3.0-01-ISUITE-EP
NOTE: Use Data Admin to Manage Incident Data and Lookup Tables.	Read Note
I. DATA ADMIN	3.0-02-ISUITE-EP
A. Identify the responsibilities of the Data Administrator:	
1. Manage incident data.	
2. Manage lookup tables.	
NOTE: Only those users assigned **Data Admin** rights can access the Data Admin module.	Read Note

DETAILED LESSON OUTLINE

COURSE:	I-Suite
UNIT:	3.1 – Data Admin: Manage Incident Data.
SUGGESTED TIME:	20 minutes
TRAINING AIDS:	Computer projector, screen, computer (one for instructor and one per trainee).
OBJECTIVES:	Upon completion of this unit, the trainee will be able to:

1. Manage incidents.
2. Manage accounting codes.

OUTLINE	AIDS & CUES
INTRODUCE THE UNIT.	Instructor Comments
PRESENT UNIT OBJECTIVES.	
I. INCIDENT DATA	
A. Manage incidents.	
B. Manage accounting codes.	
II. MANAGE INCIDENTS	3.0-3-ISUITE-EP
A. To manage incidents:	
NOTE: Multiple incidents can be included in one database. Each incident must have a unique default accounting code.	Read Note
NOTE: Required information is identified with an asterisk (*) before the label.	Read Note
1. From the **Modules** drop-down menu, select **Data Admin**.	
2. On the **Data Admin** window, click the **Incident Data** tab.	
3. To add a new incident to the database:	
a. Under **Feature**, click to select **Incident**.	
b. In the **Incident Name** box, type the name to assign to the incident.	
c. In the first **Incident Number** box, type the **State** for the incident. In the second box, type the **Unit ID** for the incident. In the third box, type the **Incident Number** assigned to that incident (e.g. MT-LNF-000001).	
d. From the **Incident Jurisdiction** drop-down list, select the agency that has jurisdiction for the incident.	
NOTE: The Incident Jurisdiction facilitates cost accrual category decisions.	Read Note
a. In the **Location** box, type the location of the incident.	
b. From the **State** drop-down list, select the appropriate state.	
c. In the **Start Date** box, enter the date when the	

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incident started or when the first cost was incurred, whichever is earliest. You can either type the date or select it from the drop-down calendar.	
NOTE: When the incident end's, you can enter an end date into the **End Date** box. This information is not required.	Read Note
g. From the **Agency** drop-down list, select the agency to assign to the incident.	
NOTE: An **Agency** is required. You cannot define an **Accounting Code** until an **Agency** is selected.	Read Note
h. In the **Accounting Code** box, type the accounting code to assign to the incident.	
NOTE: You must first select an **Agency** before you can define an **Accounting Code**	Read Note
i. If you selected the **FS Agency**, a **Region/Unit** drop-down list is available. Select the appropriate unit code or region from this drop-down list.	
NOTE: The **Region/Unit** is not required. If a **Region/Unit** is selected, it prints on the **OF-288** in **Block 3** (Unit 1 Acct Code).	Read Note
j. Click the **Save** button.	
4. To edit an incident:	
a. On the **Data Admin** window, click the **Incident Data** tab.	
b. Under **Feature**, click to select **Incident**.	
c. In the **Data Admin** grid click the **Incident Name** you want to edit.	
d. Under **Incident - Edit Mode**, edit the data, as needed. Click the **Save** button to save your changes.	
NOTE: You must edit **Accounting Codes** on the **Accounting Codes** window.	Read Note
HAVE STUDENTS PRACTICE CREATING AND EDITING INCIDENTS.	Instructor Comment
III. MANAGE ACCOUNTING CODES	3.0-04-ISUITE-EP

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A. To manage accounting codes:	
NOTE: Because changes will impact all users, use caution when adding or editing accounting codes. Only add accounting codes that belong to the selected Incident. Adding an accounting code to an incident that does belong to that incident can negatively impact incident cost data.	←Read Note
1. Open the **Data Admin** module.	
2. Click the **Incident Data** tab.	
3. To add a new accounting code to the database:	
a. Under **Feature**, click to select **Accounting Code**.	
b. From the **Incident Name** drop-down list, select the appropriate incident name.	
c. From the **Agency** drop down list, select the appropriate agency.	←Read Note
NOTE: If you select an **Agency** that already has an accounting code defined for the incident, a warning message will display when you save the accounting code. You can select **Yes** to continue saving the accounting code or **No** to cancel.	
d. In the **Accounting Code** box, type the new accounting code for the incident.	
e. If you selected the **FS Agency**, a **Region/Unit** drop-down list is available. Select the appropriate region or unit from this drop-down.	
f. To set the new accounting code as the default accounting code for the selected incident, click to check the **Incident Default** checkbox.	
g. Click the **Save** button to save the accounting code.	
4. To edit an accounting code:	
a. On the **Data Admin** window, click the **Incident Data** tab.	
b. Under **Feature**, click to select **Accounting Codes**.	
c. From the **Incident Name** drop-down list, select the appropriate incident name.	

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d. In the **Data Admin** grid , click to select the **Accounting Code** you want to edit.	
e. Under **Accounting Codes - Edit Mode**, edit data, as needed.	
f. Click the **Save** button to save your changes.	
HAVE STUDENTS PRACTICE CREATING AND EDITING ACCOUNTING CODES.	
	Instructor Comment
REVIEW UNIT OBJECTIVES.	**Instructor Comment**

DETAILED LESSON OUTLINE

COURSE:	I-Suite
UNIT:	3.2 – Data Admin: Manage Lookup Tables.
SUGGESTED TIME:	30 minutes
TRAINING AIDS:	Computer projector, screen, computer (one for instructor and one per trainee).
OBJECTIVES:	Upon completion of this unit, the trainee will be able to:

1. Manage lookup tables.
2. Add a new Kind to the Kind Codes Lookup table.

OUTLINE	AIDS & CUES
INTRODUCE THE UNIT.	Instructor Comments
PRESENT UNIT OBJECTIVES.	
I. LOOKUP TABLES	
A. Manage lookup tables.	
B. Add a new Kind to the Kind Codes Lookup table.	
II. MANAGE LOOKUP TABLES	3.0-05-ISUITE-EP
A. To manage lookup tables:	
NOTE: Because changes to Lookup tables will impact all users, use caution when making any changes to the Lookup tables. If the Resource Unit Leader (RESL) and Computer Technical Specialist (CTSP) are assigned to an incident, they should coordinate any changes with the Time Unit Leader (TIME).	Read Note
NOTE: The I-Suite system includes default values in the Lookup tables.	Read Note
1. Open the **Database Admin** module.	
2. On the **Data Admin** window, click the **Lookup Tables** tab.	
3. To add a new item to a lookup table:	
a. Under **Feature**, click to select the appropriate **Lookup Table**.	
b. Enter the appropriate information into the text boxes that display. The text boxes that display are based on the **Lookup Table** you have selected.	
c. After entering all required information (identified with an asterisk[*]) and any optional information, click the **Save** button.	
HAVE STUDENTS PRACTICE ADDING NEW ITEMS TO LOOKUP TABLES.	Instructor Comment
4. To edit a lookup table:	
a. On the **Data Admin** window, click the **Lookup Tables** tab.	
b. Under **Feature**, click to select the **Lookup Table** you want to edit.	

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c. Enter the appropriate information into the text boxes that display. The text boxes that display are based on the **Lookup Table** you have selected.	
d. After entering all required information and any optional information, click the **Save** button.	
NOTE: The only **Standard** lookup table in which data can be edited is the Kind Codes table. Standard indicates that the lookup data is standard in that version of the database. Data in all non-standard lookup tables can be edited.	Read Note
5. To delete a **Non-Standard** Lookup option:	
a. On the **Data Admin** window, click the **Lookup Tables** tab.	
b. Under **Feature**, click to select the **Lookup Table** with the option you want to delete.	
c. In the **Lookup** grid, click the **Non-Standard** lookup option you want to delete.	
d. Click the **Delete** button in the **Main** toolbar at the top of the window.	
e. When the confirmation message displays, click the **Yes** button to remove the option from the Lookup table.	
NOTE: You can only delete **Non-Standard** lookup tables. You cannot remove Standard lookup tables.	Read Note
HAVE STUDENTS PRACTICE EDITING LOOKUP TABLES.	Instructor Comment
B. To add a new Kind to the Kind Codes Lookup table:	3.2-01-ISUITE-HO 3.2-02-ISUITE-HO
NOTE: In the following exercise, you will practice adding Kinds to the Kind Codes Lookup table. While this exercise deals specifically with the Kind Codes Lookup table, the same concepts apply to all reference tables.	Read Note
HELP STUDENTS CREATE A NEW KIND CALLED A "SCOOPER" OR A "SCRAPER." MODEL THE NEW KIND LIKE A SKIDDER.	Instructor Comment
NOTE: A straightforward rule-of-thumb for creating a new Kind is to identify a resource similar in values to the new Kind. For example, an ATV is similar to a four-wheeler, or a golf cart is like a potable-water tender.	Read Note

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NOTE: For this exercise, refer to the "Create a Resource Kind" handout.	Read Note

1. Open the **Data Admin** module.
2. Click the **Lookup Tables** tab.
3. Under **Feature**, click to select **Kind Codes**.
4. Find a resource that is similar to the new **Kind** you are creating. Write down the specific quantity, units, and categories assigned to this resource.
5. To add a new **Kind Code**, click the **Add** button.
6. Under **Kind Codes**, enter the appropriate information including:
    a. Kind Code
    b. Quantity
    c. Units
    d. Rate Type
    e. Report Category
    f. Indicate if **Direct** resource or **Line Overhead**
    g. Daily Form
    h. Aircraft Type .
7. To save your changes, click the **Save** button. Click the **Close** button to close the window.

REVIEW UNIT OBJECTIVES. — Instructor Comment