UNIT 3

I-Suite Data Admin

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This Training Manual is for use with the 9.01.00 version of the I-Suite System.

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Changes in Training Manual

The following changes were made to the Data Admin Training Manual for the 9.01.01 release:

Manage Incidents

- 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). (See page 2)

Manage Accounting Codes

- **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. (See page 3)

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	3.0 – Data Admin: Overview.
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.

NOTE: Use Data Admin to Manage Incident Data and Lookup Tables.

I. DATA ADMIN

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.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	3.1 – Data Admin: Manage Incident Data.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: 1. Manage incidents. 2. Manage accounting codes.

I. INCIDENT DATA

A. Manage incidents.

B. Manage accounting codes.

II. MANAGE INCIDENTS

A. To manage incidents:

NOTE: Multiple incidents can be included in one database. Each incident must have a unique default accounting code.

NOTE: Required information is identified with an asterisk (*) before the label.

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.

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 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.

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.

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**

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).

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.

III. MANAGE ACCOUNTING CODES

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.

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.

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.

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.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	3.2 – Data Admin: Manage Lookup Tables.
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.

I. LOOKUP TABLES

A. Manage lookup tables.

B. Add a new Kind to the Kind Codes Lookup table.

II. MANAGE LOOKUP TABLES

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).

NOTE: The I-Suite system includes default values in the Lookup tables.

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.
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.
   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.

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.

B. To add a new Kind to the Kind Codes Lookup table:

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.

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.

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

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.