I-SUITE

4.11 –ITS: ADVANCED TOPICS

OBJECTIVES

Upon completion of this unit, the trainee will be able to:

1. Manage contractor and agreement data from IRSS input.

2. Work with the appropriate Unit of Measure (UOM) and coordinating with cost.

3. Handle complicated contracts.

4. Work with auditing functions for personnel and crew time, equipment time, and commissary time.

5. Close out payment documents.

6. Manage multiple incidents.

7. Troubleshoot the ITS application.

8. Answer outstanding questions.

I. INTRODUCTION:

A. Manage contractor and agreement data from IRSS input.

B. Work with the appropriate Unit of Measure (UOM) and coordinating with cost.

C. Handle complicated contracts.

D. Work with auditing functions for personnel and crew time, equipment time, and commissary time.

E. Close out payment documents.

F. Manage multiple incidents.

G. Troubleshoot the ITS application.

H. Answer outstanding questions.

II. EXERCISES

A. To determine if the contractor already exists in the I-Suite database, perform the following.

1. Click the **Contracts** button.

2. On the **Contracted Resource Add/Edit** screen under **Select Type**, click to select the **Contract resource** of your choice.

3. Click the **Contractor Name** drop-down arrow, and then click to select the **Contractor** of your choice.

B. To add a new contractor.

1. Click the **Contracts** button.

2. On the **Contracted Resource Add/Edit** screen on the **Add** tab.

3. Complete the following information as appropriate

   a. Name.

   b. EIN/SSN.

   c. Address.

   d. City.

   e. ST.

   f. Zip.

   g. Phone.

4. Click the **Save** button.

C. To create the agreement and attach it to the contractor.

1. On the **Contracted Resource Add/Edit** screen, click the **Contractor Name** drop-down arrow, and then click to select the **Contractor Name** of your choice.

2. Click the **Agreement** tab, and then click the **Add** tab.

3. Complete the following information.

   a. Agreement Number.

   b. Begin Date.

   c. Expiration Date.

   d. Point of Hire.

   e. Administrative Office for Payment.

4. To attach the agreement to the contractor, click the **Agreement Number** drop-down arrow, and then click to select the **Agreement Number** of your choice.

5. Click the **Save** button.

D. To add resources and rates and link them to the contractor and agreement.

1. On the **Contracted Resource Add/Edit** screen under **Select Resource By**, click **Name** or **Request Number**.

2. Click the **Unique Name** or **Request Number** drop-down arrow, and then click to select the **Name** or **Request Number** of your choice.

3. Complete the **Contractor Name** and **Agreement Number** boxes for the **Contractor/Agreement** of your choice.

4. On the **Resource** tab on the **Edit** tab, complete the following information.

   a. In the **Unique ID** box, create a unique name for the resource.

   b. Complete the **Make**, **Model**, and **Remarks** boxes, as appropriate.

   c. Click to select the **Gov't Operator** and **Gov't Supplies** check boxes, as appropriate.

   d. Complete the **Hired Date** and **Time** boxes and the **Released Date** and **Time** boxes, as appropriate.

   e. Click to select the **Withdrawn** check box, as appropriate.

   f. Click the **Rate Type** drop-down arrow, and then click to select the **Rate Type** of your choice.

   g. Click the **UOM** drop-down arrow, and then click to select the **Unit of Measure** of your choice.

   h. Click in the **Rate** box, and then type the appropriate **Rate** for that **Rate Type** and **Unit of Measure**.

   i. Press TAB twice to advance the cursor to the next **Rate Type** box.

5. Verify that the correct **Request Number**, **Contractor Name**, and **Agreement Number** display on the upper portion of the **Contracted Resource Add/Edit** screen.

6. Click the **Save** button.

7. On the **Warning – Check for Correct Agreement/Contractor** dialog box, click **Yes**.

E. To post time for resources.

1. Click the **Post Time** button, and then click the **Contract Equipment, Crews and Other** tab.

2. Under **Select Type**, select the equipment type of your choice.

3. Click the **Contractor Name** drop-down arrow, and then click to select the **Contractor Name** of your choice.

4. Perform one of the following

   a. Click the **Equipment Unique ID** drop-down arrow, and then click to select the **Equipment** of your choice.

   b. Click the **Request Number** drop-down arrow, and then click to select the **Request Number** of your choice.

5. Click the **Account Code** drop-down arrow, and then click to select the **Account Code** of your choice.

6. Under **Post Options**, click to select the **Rate Type** of your choice.

7. If one-half rate applies, click to select the **½ Rate** check box.

8. Post the required information as appropriate for that **Rate Type** and **Unit of Measure**.

9. To commit the posting, click the **Commit Posting** button.

F. To print the OF-286.

1. On the **Reports** menu, click **OF-286 w/ Deductions**.

2. On the **OF-286** dialog box, complete the following.

   a. Under **Select Type**, click to select the **equipment type** of your choice.

   b. Click the **Contractor** drop-down arrow, and then click to select the **Contractor Name** of your choice.

   c. Click the **Agreement** drop-down arrow, and then click to select the **Agreement** of your choice.

   d. Click the **Equipment** drop-down arrow, and then click to select the **Equipment** of your choice.

3. Under **Report Options**, click to select one of the following.

   a. OF-286 with Itemized Deductions.

   b. OF-286 Only.

   c. Itemized Deductions Only.

4. To preview and then print the report, click the **Preview/Print Report** button, and then click the **Print Report** icon.

G. To delete a duplicate contractor with no attached resources.

1. To locate the duplicate contractors, click the **Contracts** button, click the **Contractor Name** drop-down arrow, and then locate the duplicate **Contractor Names**.

2. To rename the duplicate contractors, perform the following.

   a. On the **Edit** tab, click the **Contractor Name** drop-down arrow, and then click to select the first duplicate **Contractor Name**.

   b. In the **Name** box, edit the **Contactor Name** and then click the **Save** button.

   c. On the **Edit** tab, click the **Contractor Name** drop-down arrow, and then click to select the second duplicate **Contractor Name**.

   d. In the **Name** box, edit the **Contractor Name** and then click the **Save** button.

3. To locate the contractor with no attached resources, perform the following.

   a. Click the **Equipment Search** button.

   b. To sort the data by **Contractor Name**, click the **Contractor Name** column heading.

   c. Scroll to the duplicate **Contractor Name(s)**.

4. To delete the agreement number attached to the duplicate contractor, click the **Contracts** button, click the **Agreement Number** drop-down arrow, click to select the appropriate **Agreement Number**, and then click the **Delete** button.

5. To delete the duplicate contractor, click the **Contractor Name** drop-down arrow, click to select the **Contractor Name** you want to delete, and then click the **Delete** button.

6. To verify that the deletion of the duplicate contractor, click the **Refresh** button.

H. To delete a duplicate contractor with attached resources.

1. To locate the duplicate contractors, click the **Contracts** button, click the **Contractor Name** drop-down arrow, and then locate the duplicate **Contractor Names**.

2. Edit/rename the duplicate contractors.

3. On the **Contracted Resource Add/Edit** screen under **Select Resource By**, click **Name** or **Request Number**, and then click to select the **Name** or **Request Number** of the resource to be moved.

4. Click to select the **target Contractor Name** and **Agreement Number** for the resource to be moved, and then click the **Save** button.

5. Move all **resources** to the **target Contractor Name/Agreement Number**.

6. To delete the agreement number attached to the duplicate contractor, click the **Contracts** button, click the **Agreement Number** drop-down arrow, click to select the appropriate **Agreement Number**, and then click the **Delete** button.

7. To delete the duplicate contractor, click the **Contractor Name** drop-down arrow, click to select the **Contractor Name** you want to delete, and then click the **Delete** button.

8. To verify that the deletion of the duplicate contractor, click the **Refresh** button.

I. To post a partial payment for a firefighter.

1. To print the **OF-288**, perform the following:

   a. On the **Reports** menu, click **OF-288**.

   b. On the **OF-288** dialog box, click the **Person** drop-down arrow, and then click to select the **Person** of your choice.

   c. Click to select the **Final** check box, and then click the **Preview Report** button

   d. To print the **OF-288**, click the **Print Report** button.

2. Click the **Personnel** button, and then click the **Edit/Lookup** tab.

3. Click the **Select Personnel** drop-down arrow, and then click to select the **Person** who is receiving the partial payment.

4. In the **Remarks** box, type the following information.

   a. PP

   b. date of partial payment.

   c. Your initials.

J. To post a partial payment to a contractor

1. On the **Reports** menu, click **OF-286**.

2. On the **OF-286** dialog box, complete the **Contractor**, **Agreement**, and **Equipment** boxes.

3. Click the **Last Date Included on Invoice** drop-down arrow, and then click to select the **Last Date** for the partial payment.

4. Under **Print Options**, click to select **Preview/Print ORIGINAL Invoice**, and then click the **Preview/Print Invoice** button.

5. Click the **Print Report** icon, and then click the **OK** and **Yes** buttons on the **IReports** dialog boxes.

K. To delete a previous invoice for payment to a contractor.

1. On the **Reports** menu, click **OF-286**.

2. On the **OF-286** dialog box, complete the **Contractor**, **Agreement**, and **Equipment** boxes.

3. On the **Warning** dialog box, click **Yes**.

4. On the **Final Warning** dialog box, click **Yes**.

5. On the **Reason** dialog box, type a brief **Reason** for deleting the invoice, and then click **OK**.