



UNIT 1

I-Suite Introduction

7/12/2013

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Unit 1

I-Suite Introduction

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2. Identify the I-Suite modules.

STUDENT MANUAL

COURSE	I-Suite
UNIT	1.0 – Course Overview.
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify course organization and topics.

I. INTRODUCTION

NOTE: The Introduction Unit is not "hands on." The information for this section is explained in a Power Point presentation.

A. Transportation.

1. Who needs rides to lunch, hotel, etc.?
2. Facilities: Restrooms, drink and snack locations, emergency exits.
3. Lunch and break schedule.
4. Telephones and where emergency messages can be left.

B. Time Frames.

1. There is a lot to cover.
2. Class will start at the time specified.

C. Unit Topics.

1. The following topics are covered in this training manual:
 - a. 1.0 – Course Overview
 - b. 1.1 - Security for I-Suite
 - c. 1.2 – Getting Started with I-Suite
 - d. 1.3 – Common Features
 - e. 1.4 – I-Suite Options
 - f. 1.5 – Working with grids and tables
 - g. 1.6– I-Suite Modules

D. Course Overview.

1. The training manual is divided into separate units corresponding to the modules.
2. Handouts are located at the end of each unit.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	1.1 - Security for I-Suite
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Learn the Rules of Behavior to which you must adhere.2. Identify the key I-Suite security principles.3. Understand that I-Suite may contain PII Data and how that data is protected.4. Understand I-Suite user accounts.

I. RULES OF BEHAVIOR

- A. All I-Suite users must understand and follow the Rules of Behavior, the security principles and practices, and know and practice their responsibilities regarding I-Suite security.

NOTE: Some Incident Management Teams have a Rules of Behavior document that must be read and signed.

- B. It is everyone's responsibility to safeguard the information that is collected, stored and maintained by the I-Suite application.
- C. The Rules of Behavior do not replace but enhance existing agency policies.
- D. Users are to work within the confines of their authorized access or role. Users should not attempt to access other modules or screens in the I-Suite application to which they do not have authorization. User accounts and additional roles can be granted by a user with a DB Admin role, which is usually the incident Computer Technical Specialist (CTSP).
- E. Security violations include, but are not limited to:
 - 1. Sharing of user name and password pairs.
 - 2. Sharing I-Suite information or data with individuals who do not have an official need to know.
 - 3. Violating any other security policy or procedure.
- F. If you leave your computer for any period of time, close the I-Suite application. This will ensure that no unauthorized person can access the I-Suite application while you are away.

II. I-SUITE SECURITY PRINCIPLES

- A. A user must have an active user account in an I-Suite database in order to log into the I-Suite application and access that database. The only exception to this rule is during the initial setup procedure when an initial DB Admin account is created.
- B. Only a user with a DB Admin role can create User Accounts. In most cases, this is the incident CTSP at the Incident.
- C. Each user must be assigned a unique user name and password to log into a database within the I-Suite application.
- D. A user cannot use the same user account to log into the same database at the same time, unless they have a DB Admin role.
- E. Backing up the I-Suite database is crucial and should be done on a regular basis. The I-Suite application includes an automatic backup feature that allows the CTSP to backup the database as often as needed. For more information on backups, refer to the *I-Suite Database Admin Training Manual*.
- F. I-Suite databases should NOT be distributed to anyone except those outlined in other

- policies (e.g. to transitioning team, owning unit, or authorized personnel).
- G. Before logging into I-Suite you must read and agree to the security statement that displays.
- H. Only authorized personnel can attach a repository database file. The repository database file does not use the same password as the database used to create it.
- I. You must have a DMS User Name and DMS Password to upload the repository and other export files on the I-Suite Web site (<http://isuite.nwcg.gov>).
- J. You must enter the database password to perform the following processes:
- Attach a database
 - Detach a database
 - Restore a database from a backup
 - Copy a database
 - Rename a database
 - Merge databases
- K. When you create a new database, you **MUST** provide a password for the database. The requirements for the database password are:
1. Must contain a minimum of 12 characters.
 2. Must contain at least 1 lowercase letter.
 3. Must contain at least 1 uppercase letter.
 4. Must contain at least 1 number.
 5. Must contain at least one of the following special characters:

!#%&*^
 6. Cannot be a dictionary word.

III. PII Data

- A. PII data is Personally Identifiable Information.
- B. The I-Suite application limits access to data based on roles assigned to User Accounts. A user can only access data that is relevant to their assigned role.
- C. The I-Suite database may contain PII data, such as Social Security Numbers (SSN), Tax Identification Numbers(TIN), address and phone information.
- D. The SSN and TIN are encrypted in the database and are never visible to the user in I-Suite. Data entry is masked with asterisks and must be entered twice for verification.
- E. All data export files are encrypted for security purposes to protect PII and other sensitive data.

III. Understand I-Suite User Accounts

- A. I-Suite user accounts consist of a unique user name and password set. They are specific to each database and the same account may be used in multiple databases.
- B. A user name must be 1 to 20 characters in length and cannot be "admin." The user name usually consists of the first letter of the user's first name and their last name (e.g. John Doe is jdoe).
- C. User names must be unique to the database, regardless of the case that is used. For example, jdoe and JDoe are considered the same user name.
- D. When you change your password for any reason, your password:
 - 1. Must contain a minimum of 12 characters.
 - 2. Must contain at least 1 lowercase letter.
 - 3. Must contain at least 1 upper case letter.
 - 4. Must contain at least 1 number.
 - 5. Must contain at least one of the following special characters:

!#%&*^_
 - 6. Cannot be a dictionary word.
 - 7. Cannot be one of the last 24 passwords defined for your account.
- E. The first time you log into the I-Suite application, you must change your password.
- F. You must change your password when it is reset by an administrator (usually the incident CTSP).
- G. Passwords are case sensitive.
- H. If you fail to login with a correct password **5** consecutive times, your user account will be locked.
- I. If your User Account is locked, you must contact your local I-Suite Administrator (CTSP) to unlock your account.
- J. The password for your User Account in I-Suite will expire **60** days for the last date the password was set or reset.
- K. A message will display **3** days prior to the expiration indicating that your password is about to expire. You have the option to change the password at that time or wait.
- L. Once your password is expired, you will be prompted to change it the next time you log into I-Suite. You must change your password or you cannot access the I-Suite application.
- M. You can change your password any time in I-Suite by selecting the **Tools** menu and the **Change Password** option.
- N. If no users with a DB Admin role can access the I-Suite application, contact the Help Desk.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	1.2 - Getting Started with I-Suite
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the components of the I-Suite application.2. Identify the different methods to obtain help for the I-Suite application.

I. HELP

A. There are several methods you can use to receive Help for the I-Suite Application:

1. **Help** is available within the I-Suite application. To access the I-Suite Application Help, select the **Help** drop-down menu at the top of any I-Suite window. When the sub-menu displays, select the **I-Suite Help** option.
2. The I-Suite Website (<http://isuite.nwcg.gov>) contains a wide variety of I-Suite documentation, including:
 - a. Software Downloads
 - b. Updates
 - c. User Guides
 - d. Quick Reference Cards
 - e. Training Material
 - f. Other User Documentation
3. Contact your incident CTSP.
4. **I-Suite User Guides** include information on using the different modules within I-Suite. These are available in a PDF format on the I-Suite Website (<http://isuite.nwcg.gov>).
5. The **Training Materials** demonstrate how to use the I-Suite system. These are also available in a PDF format on the I-Suite Website (<http://isuite.nwcg.gov>).
6. For additional help, contact the **I-Suite Helpdesk**.

NOTE: Contact information for the I-Suite HelpDesk is available by selecting the **Support** option listed under the **Help** Menu in I-Suite.

II. I-Suite Components

A. I-Suite is comprised of the following modules:

1. Database Admin
2. Data Admin
3. Resources
4. Demob
5. Incident Action Plan
6. Time
7. Cost
8. Custom Reports
9. Supply
10. Injury/Illness

STUDENT MANUAL

COURSE	I-Suite
UNIT:	1.3 – I-Suite Common Features.
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the common features of the I-Suite application.<ol style="list-style-type: none">a. Menus.b. Main I-SuiteToolbar.c. Resource Filter buttons.

I. COMMON FEATURES

A. There are many features within I-Suite that are common to most of the modules. These features include:

1. The following drop-down menus are available at the top of each window in the I-Suite system:
 - a. File menu
 - b. Modules menu
 - c. Filters menu
 - d. Reports menu
 - e. Tools menu
 - f. Help menu
3. **Module Buttons** are located on the left side of the **Main** toolbar. Click these buttons to open the indicated module.
4. **Action Buttons** are located on the right side of the **Main** toolbar. These buttons allow you to **Add**, **Edit** and **Delete** entries in the I-Suite system. These buttons also enable you to **Preview** and **Print** reports and **Refresh** the window.
5. Identify the **Incident** on the top right side of the I-Suite window.

II. FILTERS AND GRID

A. Identify where the Filters and Grid are located:

1. The **Filter** toolbar is located beneath the Main toolbar. Click the buttons in this toolbar to filter the Resources grid by **Aircraft**, **Crews**, **Equipment**, **Overhead**, **All Personnel**, or display **All** records.
2. The **Filter Bar** is located above the Resources grid.
3. **Exclude Demobed** is located next to the Filter buttons.
4. **Exclude Filled** is located under Exclude Demobed.
5. The **Resources** grid is located in the center portion of the window, beneath the toolbars. If a plus sign (+) displays next to a resource, click the plus sign to display subordinate resources.

NOTE: The **Resources** grid displays on most, but not all, I-Suite windows.

NOTE: Depending on which module is open, there may be additional buttons and checkboxes.

III. I-SUITE MENUS

A. Identify **File** menu items.

1. **Open Database** - Open an incident database in I-Suite.

2. **Print** - Print a report.
 3. **Refresh Data** - Refresh the data on your window.
 4. **Exit** - Close the I-Suite application.
- B. Select an option from the **Modules** drop-down menu to open that module in the I-Suite system.
- C. Select an option from the **Filters** drop-down menu to filter the **Resources** grid.
- D. Identify the type of **Reports** you can print from the **Reports** menu:
1. Cost Reports
 2. Demob Reports
 3. Plan Reports
 4. Supply Reports
 5. Time Reports
 6. Custom Reports
 7. Injury/Illness Reports
- E. Identify **Tools** menu items.
1. **Options** - Define various I-Suite settings.

NOTE: The settings you can change in **Options** depends on the permissions that are assigned to you in the I-Suite system.

2. **Quick Stats** - Quickly view Stats in the I-Suite system.
 3. **Change Password** - Change your I-Suite password.
- F. Identify **Help** menu items.
1. **I-Suite Help** - Opens Help information for the I-Suite application.
 2. **About** - Displays version information for I-Suite.
 3. **Support** - Displays contact information for the HelpDesk.

NOTE: The **Time**, **Cost** and **Supply** modules have their own menus that display when you are in those modules. The functions within those menus are relevant to the selected module (i.e. under the Cost menu is Graphs, Accruals, etc.)

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	1.4 – I-Suite Options.
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Select options in the I-Suite application.2. Change grid colors.3. Select columns to display.4. Change the order in which grid columns display.

I. OPTIONS

A. Identify options to use in the I-Suite application.

NOTE: The options you can change are based on the rights assigned to you in the I-Suite system.

NOTE: All customizations are specific to the user. Each user account can apply their own customized views for each module.

II. GRID SETTINGS

A. Change Grid colors.

NOTE: Color changes apply to the grids in all modules.

1. Colors for the grids can be changed on the **General** tab on the **Options** window.
2. You can select a different color for each **Grid Area**.
3. Double click the **Color Box** to open the **Color Palette**.
4. When you change the color, you can preview the change under the **Grid Colors** area on the **General** tab.

NOTE: Access the **Options** window from the **Tools** menu.

B. Identify the grid columns to display and the order in which to display them.

1. Identify the grid columns to display on the **Options** window.
2. Grid columns can be defined for each module in I-Suite.
3. The columns that are available for the grid display under **Resource Grid Columns**.
4. The columns with checkmarks next to them are the ones that display in the grid.
5. The order in which the columns display in the grid is the same order in which they display under **Resource Grid Columns**.

NOTE: You can change the order of the columns in the grid by dragging them to a different position under **Resource Grid Columns**.

C. Show the Data Saved Message Box.

1. If the checkbox **Show Data Saved Message Box** is checked on the **General** tab on the **Options** window, the **Data Saved** message displays when the **Save** button is clicked on a window.
2. If the checkbox **Show Data Saved Message Box** is not checked, the **Data Saved** message does not display when the **Save** button is clicked on a window.

D. Format T-Card Labels.

1. T-Card labels can be formatted on the **Resources/Labels** tab on the **Options** window.

NOTE: A special printer must be defined to print T-Card labels.

III. RESOURCE OPTIONS

A. **Other** column titles in the Resources grid:

1. Other column titles for the Resources grid can be changed on the **Resources** tab on the **Options** window.
2. Use the box next to the default **Other** column title to change the title (i.e. to change the name of the **Other 1** column, enter the new name in the box next to **Other 1**).

NOTE: When the title for the **Other** columns are changed on the **Resources** tab in **Options**, the changes are saved to the database. This means that all users will see the changes.

B. Additional kind codes for **QuickStats**:

1. Additional **Kind Codes** for **QuickStats** can be defined on the **Resources** tab on the **Options** window.
2. The **Kind/Position** drop-down contains a list of kind codes you can add to QuickStats.
3. When you add a new code, it displays in the **Additional Kinds used for QuickStats** grid.

NOTE: When you add additional kind codes for **QuickStats**, the changes are saved to the database. This means that all users will see the changes.

C. Each user can identify the **Default Checkin Date and Time** they want to use in I-Suite.

1. Define the **Default Checkin Date and Time** on the **Resources** tab on the **Options** window.
2. You can set the the **Default Checkin Date and Time** to one of the following:
 - **System Date** - Select this option to automatically use the system date and time for the **Check-in**.
 - **Blank** - Select this option leave the **Check-In Date and Time** blank.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	1.5 – Working with Grids.
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Work with grids in the I-Suite application.2. Filter resources.3. Sort resources.

I. GRIDS

- A. Work with grids in the I-Suite application.
- B. Filter Resources
- C. Sort Resources

NOTE: The Grids that display in I-Suite depend on the module that is open.

II. FILTER RESOURCES

A. Filter Buttons:

1. **All** - Displays all resources in the grid.
2. **Aircraft** - Only displays aircrafts in the grid.
3. **Crews** - Only displays crews in the grid.
4. **Equipment** - Only displays equipment in the grid.
5. **Overhead** - Only displays overhead resources in the grid.
6. **All Personnel** - Only displays personnel in the grid.

NOTE: A **Leader** column displays in the grid when the **All Personnel** filter is selected. A checkmark in this column identifies the resource as a leader.

B. Filter Bar :

NOTE: You do not have to enter an entire search term. When you enter the first few characters of a term for any column, all entries that begin with those characters display in the grid.

1. Filter terms are entered in the **Filter** boxes above the columns in the grid.
2. When defining a filter, you only need to type one or two characters in the **Filter** box. I-Suite filters the grid as you type.

EXAMPLE: To search for all resources with a name that begins with the letter **S**, type that letter in the **Filter** box above the **Name** column.

3. Use the **Clear Filter Bar** button to clear any filters entered in the **Filter Bar**.

III. SORT RESOURCES

A. Column Headings:

1. When you click a column heading in the grid, the entries are sorted by that column.
2. You can sort the grid in either **Ascending** or **Descending** order. When you click the column heading once, it is sorted in **Ascending** order. Click it again to sort it in **Descending** order.

EXAMPLE: To sort grid data by request number, click the **Request Number**

column heading. If the data is in **Ascending** order and you want to display it in **Descending** order, click the column heading a second time.

B. Multiple Sorts:

1. You can use multiple sorts for the data in the grid. For example, you could click the **Overhead** button. Then enter **S** in the filter bar above the **Name** column and **FS** above the **Agency** column. Then click the **Kind Desc** heading to sort the column in ascending order.

NOTE: To use multiple columns to sort the data in the grid, hold down the **Shift** key and click each column heading you want to include in the sort.

C. Print the Sorted/Filtered Grid.

1. If you want to print a filtered/sorted grid, you would first need to **Filter** the grid. Then **Sort** it in the appropriate order.
2. When you click the **Print** button in the **Main** toolbar, a report with the filtered grid is sent to your default printer.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	1.6 – I-Suite Modules.
OBJECTIVES	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify how roles determine access to each of the I-Suite modules.2. Identify the I-Suite modules.

I. USER ROLES

A. Identify how roles determine access to each of the I-Suite modules.

1. Access to each of the I-Suite Modules is determined by the user's assigned role. A User's role may include access to multiple modules (e.g. Resources and Time).

II. I-SUITE MODULES

A. Identify the function of the I-Suite Modules:

1. **Database Admin** - This module is used to Manage the Database. Access this module from the **Modules** drop-down menu. The following **Action** buttons display on the left side of the window:

- a. **Attach** - attaches databases to the I-Suite application.
- b. **Detach** - detaches database from the I-Suite application.
- c. **Backup** - backs up the databases.
- d. **Restore** - restores a backup database.
- e. **Copy/New DB** - creates and copies databases.
- f. **Rename** - renames a database.
- g. **Create Repository** - creates a data repository file that can be uploaded to the repository site.
- h. **Purge SSN/EIN** - changes all social security numbers and EINs to 9's.
- i. **Import Data** - imports data into I-Suite.
- j. **Export Data** - creates export data files from I-Suite.
- k. **IMS** - merges databases.
- l. **Users** - sets up I-Suite users and defines their permissions in the I-Suite system. There are two levels of users - Admin (server rights), and I-Suite (database rights). An Export and Import option are available to move users between databases.

NOTE: A unique user name and password must be defined for each user in the database.

2. **Data Admin** - All incident data and lookup tables are managed through the Data Admin Module. Use the options in this module to:

- a. Define incidents in I-Suite.
- b. Manage accounting codes.
- c. Define non-standard lookup tables.

3. **Resources** - The Resources Module is the primary data entry point for I-Suite. Keep the following points in mind when using the Resources module:

- a. The **Add/Edit** screen can be accessed from each module.

- b. Enter **Common Data** for each resource in the area just beneath the **Resources** grid.
 - c. **Module** tabs display at the bottom of the **Resources** window. The tabs that display are based on the permissions that the user has in I-Suite.
4. **Demob** - The Demob module provides additional fields and reports for demob planning, reassignment and release.
- a. Use the **Action** buttons - **P** (Group Pending), **D** (Group Demob), and **N** (No Grouping) - on the left side of the **Demob** toolbar to change the status assigned to resources. Use the other buttons to generate Demob reports.
 - b. The **Default Data** from check-in displays in the area on the left side of the window.
 - c. **Tentative Release** information is defined in the center section on the Demob window.
 - d. **Actual Release** information is defined in the area on the right side of the window.
5. **IAP** - The IAP module utilizes the I-Suite database to create several of the ICS forms.
- a. Use the buttons in the IAP toolbar to create and maintain ICS forms.
 - b. Forms created in IAP display in the Tree View.
 - c. The user can create the following ICS forms in IAP: ICS202, ICS203, ICS204, ICS205, ICS206 and ICS220.
6. **Time** - The Time Module allows the user to manage time records, create payment documents and reports. Use this module to:
- a. Post personnel, crew, and contract time.
 - b. Post commissary adjustments.
 - c. Edit roster data.
 - d. Print invoices (OF-286 and OF-288).
7. **Cost** - The Cost Module is a tool to analyze and report cost data. Use this module to:
- a. Generate daily cost records.
 - b. View daily cost records.
 - c. Edit daily cost records.
8. **Custom Reports** - Custom reports may be created using the Report Designer or by using the Advanced Designer.
- a. **Report Designer**: Use pre-defined views and fields to design and run reports.
 - b. **Advanced Designer** - Use SQL statements to design and run reports.
9. **Supply** - The Supply Module allows the user to:

- a. Track, issue and return items for resources and locations.
10. **Injury/Illness** - The Injury/Illness module allows the user to:
- a. Track injuries, illnesses and prevention for an incident.



UNIT 2

I-Suite Database Admin

7/12/2013

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Unit 2

I-Suite Database Admin

2.0 – Database Admin: Overview.

1. Identify the purpose of the Database Admin module.

2.1 – Database Admin: Managing Your Incident Database.

1. Manage an Incident Database:
 - a. Creating an incident database.
 - b. Attaching an incident database.
 - c. Detaching an incident database.
 - d. Backing up an incident database manually.
 - e. Backing up an incident database automatically.
 - f. Restoring an incident database.
 - g. Copying an incident database.
 - h. Renaming an incident database.
 - i. Identifying the current versions of the I-Suite application, database, and installation.

2.2 – Database Admin: Managing Users and Roles.

1. Manage Users and Roles:
 - a. Creating Database Admin users.
 - b. Creating new users.
 - c. Managing users.
 - d. Exporting Users
 - e. Importing Users
 - f. Disconnecting Users

2.3 – Database Admin: Importing ROSS Data.

1. Import ROSS data into I-Suite.

2.4 – Database Admin: Creating Export Files.

1. Export Data by creating a Data Repository File.
2. Identify how to export Financial and Injury/Illness Data.

2.5 – Database Admin: Purging SSN/EIN's from the database.

1. Purge SSN/EIN's from the database.

2.6 – Database Admin: Auditing.

1. Audit activity in the I-Suite system.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	2.0 – Database Admin: Overview.
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: <ol style="list-style-type: none">1. Identify the purpose of the Database Admin module.

NOTE: Although Database Admin is the primary responsibility of the Computer Technical Specialist (CTSP), if you are only using one module in I-Suite or if you are an separate individual using I-Suite (i.e., not networked) you will need to be familiar with the Database Admin module to setup your system.

I. DATABASE ADMIN

NOTE: You must be assigned the **Database Admin** role and be working on the I-Suite server computer to perform **Database Admin** functions.

A. The purpose of the Database Admin module is to:

1. Manage the incident database, which includes:
 - a. Creating an incident database.
 - b. Attaching an incident database.
 - c. Detaching an incident database.
 - d. Backing up an incident database.
 - e. Restoring an incident database.
 - f. Copying an incident database.
 - g. Renaming an incident database.
2. Define I-Suite users and roles.
3. Import ROSS data into I-Suite.
4. Create the data repository file.
5. Export financial and injury/illness data.
6. Purge SSN/EIN's from the database.
7. Merge an incident database.

NOTE: Procedures for **Merging** a database can be found in the **Help** system and the *Database Admin User Reference Manual*.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	2.1 – Database Admin: Managing Your Incident Database.
OBJECTIVES:	<p>Upon completion of this unit, the trainee will be able to:</p> <ol style="list-style-type: none">1. Manage an Incident Database:<ol style="list-style-type: none">a. Creating an incident database.b. Attaching an incident database.c. Detaching an incident database.d. Backing up an incident database manually.e. Backing up an incident database automatically.f. Restoring an incident database.g. Copying an incident database.h. Renaming an incident database.i. Identifying the current versions of the I-Suite application, database, and installation.

I. MANAGE INCIDENT DATABASE

- A. Create an incident database.
- B. Copy an incident database.
- C. Attach an incident database.
- D. Detach an incident database.
- E. Back up an incident database manually.
- F. Back up an incident database automatically.
- G. Restore an incident database.
- H. Rename an incident database.
- I. Identify the current versions of your I-Suite application, database, and installation.

NOTE: Use your team's naming standards to name the new incident database. General Database Naming Rules are as follows:

- The database name should include the incident name.
- The name must not include any spaces, semi-colons, dollar signs, or any characters not allowed by MS Windows File Naming Conventions.

NOTE: All activities in the Database Admin module can only be performed on the I-Suite Server.

II. CREATE NEW DATABASE/COPY DATABASE

A. To create a blank incident database:

1. From the **Modules** drop-down menu, select **Database Admin** to open the **Database Admin** window.
2. Click the **Copy/New DB** button to open the **Copy Database** window.
3. Click the **Create New Database** button.
4. In the **Database Name** box, type the name you want to assign to the new database.

NOTE: The database name should follow the General Database Rules that were previously defined.

5. In the **Database Password** box, type the password to assign to the database.
6. Retype the password in the **Verify Password** box to make sure it was entered correctly.

NOTE: The password you define must be at least 12 characters long and include at least one lowercase letter, one uppercase letter, one number, and one Special Character. The only Special Characters you can use are **!#%&*^_**. You cannot use any other special characters in

the password.

6. Click the **OK** button to create the new database.

NOTE: The **File Path Of New Database** box displays the complete file location of the new incident database.

B. To create a new database by copying the master database:

1. Open the **Database Admin** module.
2. On the **Database Admin** window, click the **Copy/New DB** button.
3. From the **Name of Database to Copy** drop-down list, select the database you want to copy.

Notice that the path for the database automatically displays in the **Database File** box when you select a database. If the path is not correct, you can either type a new path in this box or use the browse button to select the path.

4. In the **Database Password** box, type the password for the database you are copying.
5. Under **New Database**, type the name to assign to the new database in the **Database Name** box.

NOTE: Follow your team's naming standards to name the new incident database. Make sure you follow the General Database Naming Rules that were previously defined.

6. In the **Database Password** box, type the password to assign to the new database. Retype the password in the **Verify Password** box to make sure it was entered correctly.

7. Click the **OK** button to create the new database.

NOTE: The **Copy Database** procedure automatically attaches the new copy of the incident database.

III. ATTACH/DETACH DATABASE

A. Attach an incident database.

1. Open the **Database Admin** module.
2. On the **Database Admin** window, click the **Attach** button to open the **Attach Database** window.
3. Click the browse button next to **IDB.GPG File of database to attach**.
4. On the **Browse for Existing Database File** window, click to select the master database file (extension .gpg) you want to attach. Then click the **OK** button.

The name of the database you are attaching displays in the **Attach as** box. This is the name the system automatically assigns to the database. You cannot change this name.

NOTE: You cannot use the attach function to attach the Master (ISuite.gpg) database.

5. In the **Database Password** field, type the password for the database you are attaching.

B. Detach an incident database.

NOTE: Make sure no one is using the database when it is detached or their unsaved data will be lost.

When you detach a database, other users will no longer have access to the database.

1. Open the **Database Admin** module.
2. Click the **Detach** button to open the **Detach Database** window.
3. From the **Name of Database to Detach** drop-down list, select the database you want to detach.
4. In the **Database Password** box, type the password for the database you are detaching.
5. Click the **OK** button.
6. A message displays indicating that you are about to detach the database. Click the **Yes** button to continue.
7. If there are open connections to the database, a message displays indicating that there are connections open. Click the **Yes** button to close the connections and detach the database.

IV. BACKUP DATABASE

A. To Manually backup an incident database:

1. Open the **Database Admin** module.
2. On the **Database Admin** screen, click the **Backup** button.
3. On the **Backup Database** window, click the **Manual Backup** tab.
4. From the **Database** drop-list, select the database you want to backup.
5. I-Suite automatically inserts a name for the backup in the **Name** box. This name contains the name of the database and the date and time of the backup. If needed, you can change this entry.
6. I-Suite automatically inserts the path **C:\Program Files\ISuite\Database\Backup** into the **Backup To** box. If needed, you can change this path by either typing a new one or using the **Browse** button to select the path.

NOTE: If you change the default path for the backup, I-Suite will back the database up to both the default path and the directory specified in the **Backup To** box.

7. Click the **Backup Now** button.

B. To automatically backup an incident database:

NOTE: Once initiated, automatic backups will continue at the specified intervals until

automatic backups are deactivated.

1. Open the **Database Admin** module.
2. On the **Database Admin** window, click the **Backup** button.
3. On the **Backup Database** window, click the **Auto Backup** tab.
4. Click to check the **Auto Backup Enabled** checkbox.
5. Under **Selected Databases**, click to check the checkbox next to each of the Databases you want to include in the backup procedure.
6. From the **Backup Interval** drop-down list, select the total amount of time the system should wait before performing the backup.
7. In the **Backup Destination** box, either type the path for the directory where you want to save the backup copy or use the browse button to select the path.

NOTE: If you change the default path for the backup, I-Suite will back the database up to both the default path and the directory specified in the **Backup To** box

8. Click the **Save** button, and then click the **Close** button to close the **Backup Database** window. Click the **OK** button to acknowledge that automatic backups have been activated.

NOTE: If you close the I-Suite application, Automatic Backups will not occur. For security reasons, lock your computer screen when you leave the computer.

V. RESTORE DATABASE

NOTE: You can restore either the **.bak** or the **.pgp** file.

A. Restore an incident database.

1. Open the **Database Admin** module.
2. On the **Database Admin** window, click the **Restore** button to open the Restore Database window.
3. Click the browse button next to **Restore From**.
4. On the **Browse for Existing Database Backup File** window, click to select the backup file (bak) you want to restore. Then click the **OK button**.
5. In the **Restore as database** box, type the name to assign to the restored database.

NOTE: Restoring the database with the same name as the original database will rename the original database with 1 appended to the end of the name.

The Database Name should follow the same General Database Naming Rules that were previously defined.

6. In the **Database Password** box, type the password for the database you are restoring. Then click the **OK** button.

VI. RENAME DATABASE

A. To rename an incident database:

1. Open the **Database Admin** module.
2. Click the **Rename** button.
3. From the **Name of Database to Rename** drop-down list, select the database you want to rename.

Notice that the path for the database automatically displays in the **Master Data File Source of Database** box when you select a database. If the path is not correct, you can either type a new path in this box or use the browse button to select the path.

4. In the **New Database Name** box, type the new name for the database.
5. In the **Database Password** box, type the password for the renamed database.

NOTE: Make sure you follow the General Database Naming Rules that were previously defined.

6. Click the **OK** button to rename the database.

VII. DATABASE VERSION

A. To identify the current versions of your I-Suite application, database, and installation.

1. From the **Help** drop-down menu, select **About**.
2. Review the version information on the **About** window.
3. Click the **OK** button to close the window when you have finished reviewing the information.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	2.2 – Database Admin: Managing Users and Roles.
OBJECTIVES	<p>Upon completion of this unit, the trainee will be able to:</p> <ol style="list-style-type: none">1. Manage Users and Roles:<ol style="list-style-type: none">a. Creating Database Admin users.b. Creating new users.c. Managing users.d. Exporting Userse. Importing Usersf. Disconnecting Users

I. MANAGE USERS AND ROLES

- A. Create the Database Admin user.
- B. Create a new user.
- C. Manage users.
- D. Export users.
- E. Import users.
- F. Disconnect users.

II. DATABASE ADMIN USER

NOTE: The Database Admin user is a special account that is added to the I-Suite server, rather than a database in I-Suite.

A. To create an initial Database Admin user:

1. Open I-Suite on the server.
2. After reading the security message that displays, click the **Yes** button to continue.
3. Click the **Initial Server Setup** button on the Login window.
4. On the **New User** window, complete the following:
 - a. In the **User Name** box, type a **User Name** for the **Database Admin** user.
 - b. Type the **First Name** and **Last Name** of the new **Database Admin** user in the appropriate boxes.
 - c. In the **New Password** box, type a **New Password** following the requirements specified on the window.
 - d. In the **Confirm Password** box, enter the **New Password**.

4. To save the **New User**, click the **Save** button.

NOTE: All rights except for the Injury/Illness module are automatically assigned to the Database Admin. To change the rights for the Database Admin, refer to step **III-B - Manage Users**.

III. I-SUITE USERS

NOTE: I-Suite users are added to a selected database.

A. To create a new user:

1. Open the **Database Admin** module.
2. Click the **Users** button to open the User Management window.
3. Click the **ISuite Users** tab.
4. From the **Database** drop-down list, select the database to which you are adding the

user. Then click the **Connect** button.

5. In the **User Name** box, type the user name to assign to the person.

6. Enter the person's **First Name** and **Last Name**.

7. Type a temporary **Password** for the person in the **Password** box. Type the password a second time in the **Verify Password** box to make sure it was entered correctly.

NOTE: The password you enter is a temporary password for the person. When they log into the system for the first time, they will be required to enter a new password.

8. To activate the user account, click to check the **Active** checkbox.

9. Click to check the appropriate rights for the user (e.g. **Resources, Time, Cost**, etc.).

NOTE: If you click the **All Rights** button, all rights except **Injury/Illness** are assigned to the user. You must click to check the **Injury/Illness** checkbox to assign those rights to a user.

10. After you have defined the user's rights, click the **Save** button to save the user to the system.

11. To add another **New User**, click the **Add** button. Then follow the preceding instructions for adding a new user.

NOTE: Each user must have a unique user name to log into a database. You cannot have multiple users logged into a database with the same user name. If you try to log into the database under a user name that is already logged in, a message displays indicating that they are already logged into the system (e.g. jdoe is currently logged in on IBM-98se4200).

B. To manage users:

1. Open the **Database Admin** module.

2. On the **Database Admin** window, click the **Users** button to open the **User Management** window.

3. Under **Users** on the **I-Suite Users** tab, click to select a **User Name**.

4. To change the rights of the **User**, click to check or uncheck the rights you want to assign (e.g. **Resources, Time, Cost**, etc.).

NOTE: Deselecting a user's rights restricts the user's access to those modules in I-Suite.

5. To activate or deactivate the user, click to check or uncheck the **Active** checkbox.

6. When you are finished, click the **Save** button to save your changes. Then click the **Close** button to close the **User Management** window.

IV. EXPORT USERS

NOTE: This process exports all users with an **Active** status to a file. The export includes all of the user information, including their permissions. After you export users from a database, use the **Import Users** option to import the users into a different database.

A. To export users from a database:

1. Open the Database Admin module.
2. Click the **Users** button to open the **User Management** window.
3. Click the **Export Users** button to open the **User Export** window.
4. From the **Name of database with users to export** drop-down list, select the appropriate database.
5. In the **Export File Name** box, type the name to assign to the user file you are exporting.
6. Click the **OK** button to export the users to a file.
7. When the message **Isuite User Data Export complete** message displays, click the **OK** button to close the window.
8. When the **User Export** window re-displays, notice that the path where the file was exported displays in the **Export File Name** box. Click the **Close** button to close the **User Export** window.

V. IMPORT USERS

NOTE: You must first export the users to a file before you can import them into a different database (See section IV. Export Users).

1. Open the **Database Admin** module.
2. Click the **Users** button to open the **User Management** window.
3. Click the **Import Users** button to open the **User Import** window.
4. From the **Name of database for User Data Import** drop-down list, select the database into which you want to import the users.
5. Click the **Browse** button next to the **User Data file for import** box to search for the user data file you want to import. On the **Browse for Existing User Data File** window, click the file you want to import then the **OK** button to insert it into the **User Data file for import** box.
6. In the **Generic password for imported users** box, type a temporary password to assign to all of the imported users.
7. In the **Confirm password for imported users** box, re-type the temporary password to ensure it was entered correctly.
8. Click the **OK** button to import the users to the selected database.
9. A message displays identifying any fields that were not updated for the users. Click the **OK button** to close this window.
10. When the **Isuite User Data Import Successful** message displays, click the **OK** button to close the window.
11. Click the **Close** button on the **User Import** window to close the window.

VI. DISCONNECT USER

- A. To clear a user connection if problems occur when logging into the system:
1. Open the **Database Admin** module.
 2. In the **Connection Information** grid, click the user that you want to disconnect.
 3. Click the **Disconnect User** button in the bottom right-hand corner of the window.
 4. When the confirmation window displays, click the **Yes** button to disconnect the user.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	2.3 – Database Admin: Importing ROSS Data.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Import ROSS data into I-Suite.

I. ROSS FILE DOWNLOAD AND IMPORT

- A. Check Internet Settings
- B. Download ROSS File
- C. Import ROSS data into I-Suite.
- D. Import Excluded Resources

II. IMPORT ROSS DATA

- A. Check Internet Settings Prior to Download

IF THE INSTRUCTOR HAS AN INTERNET CONNECTION, THEY MAY WANT TO DEMONSTRATE THE ROSS DOWNLOAD PROCEDURE.

1. In Internet Explorer, select the **Tools** menu and the **Internet Options**.
 2. Click the **Security** tab and select the **Trusted sites** option.
 3. Click the **Sites** button.
 4. In the **Add this website to the zone** box, enter **http://fam.nwcg.gov** and click the **Add** button.
 5. Click the **Close** button to close the Trusted sites window.
 6. Click the **Custom Level** button.
 7. Under **Active X controls and plug-ins**, select **Enable** for the following options:
 - Download unsigned ActiveX controls.
 - Initialize and script ActiveX controls not marked as safe for scripting.
 8. Click the **OK** button on the Trusted Sites Zone window to apply the changes.
 9. Close Internet Explorer.
- B. Download a ROSS data file.

NOTE: For training purposes, you will be importing the ROSS Data File provided by the instructor.

NOTE: This process can be run either from ROSS or directly from Internet Explorer. If you run this process from ROSS, select the Administration/Reports Menu option, then skip to step 6. When running the process directly from Internet Explorer, complete all steps.

1. Open your **Internet** browser.
2. In the **Address** box, type **http://fam/nwcg.gov/crn/cgi-bin/cognos.cgi**.
3. From the Namespace drop-down on the Login page, select **ROSSLDAPSSL** and click the **OK** button.
4. Enter your ROSS **User ID** and **Password**. Click the **OK** button to log into Cognos.

5. On the **Public Folders** tab, select **ROSS**.
6. Select the **User Community Reports** option.
7. Select the **System Extracts** option.
8. Select the **I-Suite Import File** option.
9. Click the **Incident** label on the top left side of the page to expand or collapse the incident selection area.
10. To filter the list of incidents, enter the filter criteria and click the **Filter** button.
11. Select an incident from the list.
12. Click the **View Report** button.
13. After the report opens on the page, click the **Create ISuite Extract** button to extract the data in the report for I-Suite.
14. In the **Enter a Filepath and Filename** box, enter the path and name to assign to the file you are extracting. Click the **OK** button to extract the file.

NOTE: The path and name defaults to c:\Isuite.txt. The Isuite.txt file will overwrite an existing Isuite.txt file. If needed, you can change this name and path. If you change the file name, make sure the extension .txt is appended to the end of the name or the file will not import into the I-Suite system.

15. When the extract is complete, a message displays indicating that the extract was successful. Click the **OK** button to close the message.
16. Click the **Log Off** option on the top left corner of the page.
17. Close Internet Explorer.

C. Import ROSS data into I-Suite.

NOTE: ROSS Data Files are updated every two hours. You can import ROSS data into an I-Suite Database as many times as needed.

NOTE: There might be more characters in ROSS data than are allowed for the corresponding data in I-Suite. If this occurs, you will be prompted to shorten the data.

1. Open the **Database Admin** module.
2. Click the **Import Data** button.

NOTE: The **Status Bar** in the bottom left corner of the **Ross Import** window identifies the database into which you are importing data. It also shows the current step on which you are working in the process.

3. On the **ROSS Import** window, click the **Import from File** option under **Import Type**.
4. Click the browse button next to **Import File Name**.
5. On the **Browse for Existing ROSS Import File** window, click the **Look in** drop-

down list. Then select the folder into which you copied the ROSS data file.

6. Click to select the ROSS data file to be imported into I-Suite, and then click the **OK** button.
7. On the **ROSS Import** window, click the **Load Data** button.
8. After the data has finished loading, the **Match/Add Incident** step displays as the first step under **Import Steps** on the ROSS Import window. Click the >> button to move the **ROSS Incident** to the **I-Suite Incidents** grid, and then click the **Next** button.

OR

9. If you want to match a **ROSS incident** to an **I-Suite incident**, click the **Selector** button to select the ROSS incident. Then click the **Selector** button to select the **I-Suite incident**. Click **Match** to match the incidents. Then click the **Next** button.

NOTE: I-Suite uses Ross IDs to match Resources in the Ross Data File with resources in the I-Suite Database. One or more of the following steps may be required, depending on the Resource Matches:

- **PREVIOUS MATCHES** – Previously Matched Ross and I-Suite Resources.
 - **VALIDATE MATCHES 1** – Ross and I-Suite Resources matched by **Request Number** and **Name**.
 - **VALIDATE MATCHES 2** – Ross and I-Suite Resources matched by **Request Number**. This step requires the user to manually match a ROSS resource to an I-Suite resource.
 - **MANUALLY MATCH/ADD** – Ross Resources that were not matched to I-Suite Resources. Ross Resources can be manually matched or added to I-Suite Resources.
 - **VALIDATE CREWS** – Crew Members with similar **Request Numbers** that were not matched to a Crew.
9. To complete the **Add Resources** step, click the >> button to add all resources from the **ROSS Resources** grid to the **I-Suite Resources** grid. To add individual resources, click the **Selector** for each ROSS resource, and then click the > button.
 10. After all of the appropriate **ROSS Resources** have been added to the **I-Suite Resources** grid, click the **Next** button to import the ROSS resources into the I-Suite database.
 11. To complete the **Previous Matches** step, compare the **ROSS Resources** to the **I-Suite Resources**. If matched resources that should not be matched are found, click the **Selector** button for the I-Suite resource, and then click **Unmatch**. To edit the I-Suite resources, type directly into the **I-Suite** grid.
 12. When you are finished editing I-Suite resources, click the **Next** button.
 13. To complete the **Validate Matches** step, compare **ROSS Resources** that were matched to **I-Suite Resources**.

14. If you find there are resources that were incorrectly matched, click the **Selector** button to select the I-Suite resource. Then click the **Unmatch** button. To edit an I-Suite resource, type directly into the **I-Suite** grid.
15. When you are finished editing the I-Suite resources, click the **Next** button.
16. To complete the **Manually Match/Add Resources** step, click the **Selector** button to select the **ROSS resource** and the **I-Suite resource**. Then click the **Match** button. To edit an I-Suite resource, type directly into the **I-Suite** grid.
17. To add all resources from the **ROSS Resources** grid to the **I-Suite Resources** grid, click the >> button. To add individual ROSS resources to the **I-Suite Resources** grid, click the **Selector** button for each ROSS resource, and then click the > button.

NOTE: An "X" displays in the **Ross Resources** grid next to each resource that was manually matched to an I-Suite Resource.

18. I-Suite automatically places crew members into the appropriate crews. To complete the **Validate Crews** step, review the list of crew members listed in the grid for each crew. If a crew member was assigned to the wrong crew, click the Selector button for the incorrect crew member and click the < button to remove the crew member from the crew.

NOTE: The I-Suite system will not import a crew member that was removed from a crew. To import that resource as a single resource, you must use the Import From Previous Exclusions option after completing the ROSS Import process.

18. Click the **Next** button. Then repeat the **Validate Crews** step for all remaining unassigned crew members.
19. When all of the crews are validated, click the **Next** button to move to the next step in the import process.
20. To complete the **Excluded Resources** step, review the list of excluded resources that displays.

NOTE: A list of excluded resources only displays if you did not import all of the resources in the ROSS Import file.

21. When you have finished reviewing the excluded resources, click the **Next** button to display the message **Import process is complete**. Click the **OK** button to close the window.

III. Import Excluded Resources

A. To import resources that were excluded when importing a ROSS Import file:

NOTE: This process is only available if you did not import all resources in a ROSS Import file.

1. Open the **Database Admin** module.
2. Click the **Import Data** button.

3. Click the **Import from Previous Exclusions** option under **Import Type**.
4. From the **Import Incident** drop-down list, select the ROSS Import File that included the resources that were excluded from the import.
5. Click the **Load Data** button.
6. Complete the remaining import steps listed under the **Import Steps** area on the **Ross Import** window.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	2.4 – Database Admin: Creating Export Files.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Export Data by creating a Data Repository File.2. Identify how to export Financial and Injury/Illness Data.

I. EXPORT FILES

- A. Create the data repository file.
- B. Identify how to export Financial and Injury/Illness Data.

II. DATA REPOSITORY EXPORT

- A. Create an I-Suite data repository file.

NOTE: You must have a **DMS User Name** and **Password** to access the I-Suite Data Repository Site. For more information, contact your incident commander or the I-Suite HelpDesk.

1. Open the **Database Admin** module.
2. Click the **Export Data** button to open the **Data Export** window.
3. Under **Export Type**, click the **Repository** option.
4. From the **Database** drop-down list, select the attached database for which you are creating the repository file.
5. Under **Select incident to be used in the file name**, click to check the checkbox for one or more incident(s) to export.
6. Click the **OK** button to create the Repository file.
7. When the **End of Incident** window displays, identify whether this is the end of the incident. If it is, click the **Yes** button. If it is not, click the **No** button.
8. When the system has finished creating the repository files, a **Repository Files Created** window displays. Click the **OK** button to close the window.

- B. Upload an I-Suite data repository file.

NOTE: The default folder in which I-Suite Data Repository Files are saved is **C:\Program Files\ISuite\Database\Backup\Repository**.

Start your **Internet** browser.

In the **Address** box, type **http://isuite.nwcg.gov**.

On the **Welcome to I-Suite** webpage, click **Data Repository**.

On the **Security Alert** window, click the **Yes** button.

On the **I-Suite Login** window, type your **DMS User Name** and **DMS Password** in the appropriate boxes, and then click the **OK** button.

On the **I-Suite Upload Form**, click the browse button next to the **File** box. Browse to where the file is located. Then click the file to select it.

Click the **Upload** button.

III. FINANCIAL AND INJURY/ILLNESS EXPORTS

- A. The **Financial** option under **Export Type** is used by the CTSP to export Financial data

(Accrual and Casual Pay). The Injury/Illness option under Export Type is used by the CTSP to export Injury/Illness data.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	2.5 – Database Admin: Purging SSN/EIN's from the database.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Purge SSN/EIN's from the database.

I. PURGE SSN/EIN

A. Purge SSN/EIN's from the database.

II. PURGE PROCESS

A. To purge SSN/EIN's from the database:

1. Open the **Database Admin** module.
2. Under **Databases**, click to select the **Database** you want to purge. Then click the **Purge SSN/EIN** button.
3. On the **Clear SSN's and EIN's** window, click the **Yes** button to set all SSN's and EIN's in the database to 9's.
4. When the second **Clear SSN's and EIN's** window displays, click **Yes** to confirm that you want to set all SSN's and EIN's in the database to 9's.

NOTE: Because the purge process cannot be reversed, two warning messages for the procedure display.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	2.6 – Database Admin: Auditing.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Audit activity in the I-Suite system.

I. AUDITING

- A. View I-Suite Login History.
- B. View External Access History
- C. View User Account History
- D. View External Account History

II. View I-Suite Login History

A. To view a history of logs into and out of different databases in the I-Suite System:

- 1. Open the **Database Admin** module.
- 2. Click the **Auditing** button.
- 3. Make sure the **I-Suite Login History** tab is selected.

NOTE: The **Login History** identifies the user name logged into the database, the name of the database into which the user is logged, whether the login attempt was successful and the date and time when the login occurred.

- 3. When you have finished viewing the login history, click the **Close** button to close the **Auditing** window.

VIEWING A LOGIN HISTORY

II. View External Access History

A. To view a history of external user accounts that accessed an I-Suite database in an external application:

- 1. Open the **Database Admin** module.
- 2. Click the **Auditing** button.
- 3. Click the **External Access History** tab.
- 4. If **External Auditing** is **Disabled**, click the **Enabled** option under **External Account Auditing**. Then and click the **Save** button to enable this auditing function.

NOTE: Enabling the **External Account Auditing** function starts the auditing process. The external access audit history will only contain a history of external accounts that accessed an external application from that point on. It will not include any history that occurred prior to that point.

- 5. Click the **Import External Account Data** button to import all of the external access history that occurred since this function was either last enabled or run.

NOTE: Depending on the amount of history that is available, it may take several minutes for the system to import the current external access history.

- 6. When you have finished viewing the external access history, click the **Close** button to

close the **Auditing** window.

VIEWING AN EXTERNAL ACCESS HISTORY

III. View User Account History

A. To view a history of changes made to User and Admin Accounts in the I-Suite system:

1. Open the **Database Admin** module.
2. Click the **Auditing** button.
3. Click the **User Account History** tab.

NOTE: The **User Account** history identifies the user name, the audit event, the database associated with the account, the user who created the account and the date and time when the account was created.

4. When you have finished viewing the User Account history, click the **Close** button to close the **Auditing** window.

VIEWING AN EXTERNAL ACCESS HISTORY

IV. View External Account History

A. To view a history of changes made to External User Accounts in the I-Suite system:

1. Open the **Database Admin** module.
2. Click the **Auditing** button.
3. Click the **External Account History** tab.

NOTE: The **External Account History** identifies the user name, the audit event, the database associated with the External User Account, the user who created the account and the date and time when the account was created.

4. When you have finished viewing the External Account history, click the **Close** button to close the **Auditing** window.

VIEWING AN EXTERNAL ACCESS HISTORY



UNIT 3

I-Suite Data Admin

7/12/2013

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Unit 3

I-Suite Data Admin

3.0 – Data Admin: Overview.

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

3.1 – Data Admin: Manage Incident Data.

1. Manage incidents.
2. Manage accounting codes.

3.2 – Data Admin: Manage Lookup Tables.

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

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	3.0 – Data Admin: Overview.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">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: <ol style="list-style-type: none">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 ends, 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 not 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: <ol style="list-style-type: none">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.



UNIT 4

I-Suite Resources

7/12/2013

Table of Contents

Unit 4

I-Suite Resources

4.0 – Resources: Overview.

1. Identify the primary purpose of the Resources module.
2. Identify Options on the Resources window.

4.1 – Resources: Options.

1. Define Resource Options, which includes:

4.2 – Resources: Filtering Data.

1. Use the Filter bar.
2. Filter using Exclude Demobed/Exclude Filled.
3. Filter with the filter buttons.
4. Sort using table column headers.

4.3 – Resources: Managing Data and Resources.

1. Identify the importance of data entry guidelines.
2. Identify common data.
3. Manage all incidents as one.
4. Manage incidents separately.
5. Add Resources (Aircraft, Overhead, Crews, Equipment).
6. Create a Strike Team/Task Force Parent Record.
7. Attach new resources to a Strike Team/Task Force Parent Record.
8. Attach existing resources to a Strike Team/Task Force Parent Record.
9. Edit Resources (Aircraft, Overhead, Crews, Equipment).
10. Refresh Data
11. Delete Resources

4.4 – Resources: Resources Reports.

1. Run and print standard reports.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	4.0 – Resources: Overview.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the primary purpose of the Resources module.2. Identify Options on the Resources window.

I. RESOURCES

A. Review the Resources module.

NOTE: The Resources module shares data with other I-Suite modules.

1. The primary purpose of the Resources module is to provide a standardized method to check-in resources when they arrive at an incident. This makes record keeping and status assessment easier.
2. Resources also produces various incident reports, including the 209 Report Data Table, Section Report, Qualifications Report, and Daily Incident Reports.

II. RESOURCES WINDOW

A. Review the Resources window:

1. The **Print T Card Label** button displays to the right of the Filter toolbar. Use this button to print T Card Labels at your default printer, which is defined in **Tools/Options**.
2. The **Resources** grid displays beneath the toolbars in the center part of the window. This grid contains a list of all resources currently defined in the system.
3. When you click either the **Edit** or **Add** button in the **Main** toolbar, a **Manage Resource** area displays at the bottom of the window. Use this area to edit or add resources.
4. Depending on the user rights assigned to you, the following tabs may display at the bottom of the window:
 - **Plans** - This tab displays for users with Resource rights.
 - **Time** - This tab displays for users with Time rights.
 - **Cost** - This tab displays for users with Cost rights.
5. A toolbar displays at the bottom of the Manage Resources area. The buttons in this toolbar include:
 - a. Close
 - b. Add
 - c. Clear
 - d. Previous
 - e. Next
 - f. Save
 - g. Roster (For a non-person resource)
 - h. Add New Component (For a Strike Team/Task Force)
 - i. Add Existing Resources/Remove Component (Strike Team/Task Force)

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 4.1 – Resources: Options.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Define Resource Options, which includes:
 - Selecting Resource Grid Columns and set order.
 - Changing “Other” Column Titles.
 - Setting Default Check-in Date.
 - Changing Quick Stats kinds.
 - Displaying Quick Stats.
 - Defining Label Settings

I. RESOURCE OPTIONS

- A. Select Resource Grid Columns and set order.
- B. Change "Other" Column Titles.
- C. Set Default Check-in Date.
- D. Change Quick Stats kinds.
- E. Display Quick Stats.
- F. Define Label Settings.

II. RESOURCES GRID

A. To identify the columns to display in the grid and the order in which to display them:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
2. Click the **Resources** tab. Then click to select the lower **Resources** tab.

NOTE: The lower **Resources** tab on the **Options** window allows you to define the options available on the Resources window.

3. Under **Resource Grid Columns**, click to check the checkbox next to each of the columns you want to display in the grid.

NOTE: You can also click to highlight a column, and then click the **Show** button to display that column in the grid. If you want to remove the selected columns from the **Resources** grid, click the **Hide** button.

3. To adjust the order in which the columns display in the **Resources** grid, click a column. Then click the **Move Up** or **Move Down** button to move the column.
4. When finished, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

III. "OTHER" COLUMN TITLES

A. To change "Other" Column Titles:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
2. Click the **Resources** tab. Then click the lower **Resources** tab.

NOTE: The "**Other**" columns are useful for filtering specific information (e.g. Team Member, EMT, etc).

3. If you want to change the titles that display for the "**Other**" columns, type the new name for the column in the box next to the default **Other** column title to change the title (i.e. to change the name of the **Other 1** column, enter the new name in the box next to **Other 1**). You can change the title for the following columns:

- a. Other 1.

- b. Other 2.
- c. Other 3.

NOTE: When the title for the **Other** columns are changed on the **Resources** tab in **Options**, the changes are saved to the database. This means that all users will see the changes.

- 4. When finished, click the **Save** button, and then click **OK** to close the **Options** window.

IV. DEFAULT CHECK-IN DATE AND TIME

A. To set the Default Check-in Date and Time:

- 1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
- 2. Click the **Resources** tab. Then click the lower **Resources** tab.
- 3. If you want to automatically insert the system date and time for the **Check-In Date and Time**, click the **System Date** option in the **Default Check-In Date and Time** box.

If you want to leave the **Check-In Date and Time** blank, click the **Blank** option in the **Default Check-In Date and Time** box.

V. QUICK STATS

NOTE: Quick Stats contains useful information for the IC or Section Chiefs for a quick picture of incident resources.

A. To change the kinds included in Quick Stats:

NOTE: When you add additional kind codes for **QuickStats**, the changes are saved to the database. This means that all users will see the changes.

- 1. From the **Tools** drop-down list, select **Options** to open the **Options** window.
- 2. Click the **Resources** tab. Then click the lower **Resources** tab.
- 3. Under **Additional Kinds used for QuickStats**, select the code you want to add from the **Kind/Position** drop-down list. Then click the **Save** button.

To remove **Kind Codes for QuickStats**, click the selector button next to the code listed under **Additional Kinds used for QuickStats**. Then click the **Delete** button at the bottom of the Options window.

- 4. When finished, click the **Save** button to save your changes. Click the **OK** button to close the **Options** window.

B. To display Quick Stats:

- 1. From the **Tools** drop-down menu, select **Quick Stats**.

VI. RESOURCE LABELS

NOTE: Use this option to set the default printer for T-Card labels.

A. To define Label settings:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
2. Click the **Resources** tab. Then click the **Labels** tab.
3. From the **Special Purpose Label Printer** drop-down list, select the label printer to use.
4. In the **First Fontsize** box, enter the font size to use for the first line on the label.
5. In the **Second Fontsize** box, enter the font size to use for the second line of the label.
6. In the **Top Offset** box, enter the print offset to use at the top of the label. This identifies the amount of space to insert at the top of the label.
7. In the **Left Offset** box, enter the print offset to use on the left side of the label. This identifies the amount of space to insert on the left side of the label.
8. From the **Font Name** drop-down list, select the type of font to print on the label.
9. Click the **Save** button to save your changes. Click the **OK** button to close the Options window.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	4.2 – Resources: Filtering Data.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Use the Filter bar.2. Filter using Exclude Demobed/Exclude Filled.3. Filter with the filter buttons.4. Sort using table column headers.

I. FILTER RESOURCES

- A. Use the Filter bar.
- B. Filter using Exclude Demobed/Exclude Filled.
- C. Filter using the Aircraft, Crews, Equipment, Overhead, All Resources, and All Personnel buttons.
- D. Sort using table column headers.

II. FILTER BAR

- A. To use the Filter bar:

NOTE: You can search for specific characters in any column.

1. Open the **Resources** module.
2. On the **Filter Bar**, click in the **Filter** box above the column you want to filter.
3. In the **Filter** box, type the first several characters of the term by which you want to filter the data.

EXAMPLE: Type **AIR** in the **Filter** box above the **Kind Desc** column heading to only display resources with Kind descriptions that begin with **AIR**.

4. To remove your filter, either delete the characters that you typed or click the **Clear Filter Bar** button to the left of the **Filter Bar**.

NOTE: If your team is part of the Supply Pilot and you have the Resources grid open in the Resource's module, you can scan an incident card to identify the resource associated with that card.

NOTE: You can filter by multiple columns at the same time by entering filter criteria in each of the columns you want to use.

III. EXCLUDE DEMOBED/EXCLUDE FILLED

- A. To use the **Exclude Demobed** checkbox to filter:

1. Open the **Resources** module.
2. On the **Resources** window, click to check the **Exclude Demobed** checkbox. This removes all demobed resources from the grid.

- B. To use the **Exclude Filled** checkbox to filter:

1. Open the **Resources** module.
2. On the **Resources** window, click to check the **Exclude Filled** checkbox. This removes all resources with a **Filled** status from the grid.

IV. FILTER TOOLBAR

- A. To filter using the Aircraft, Crews, Equipment, Overhead, All Resources, and All Personnel

buttons:

1. Open the **Resources** module.
2. On the **Resources** window, click the **Aircraft, Crews, Equipment, Overhead, All Resources**, or **All Personnel** button to filter the grid based on your selection.

V. SORT RESOURCES GRID

A. Sort using table column headers.

1. Open the **Resources** module.
2. In the **Resources** grid, click the column heading you want to use to sort the information in the grid. For example, if you click the **Name** column heading, the information is sorted in **Name** order.
3. Click the heading once to sort the information in **Ascending** order. Click the heading a second time to sort in **Descending** order.

NOTE: To use multiple columns to sort the data in the grid, click an initial column heading by which to sort. Then hold down the Shift key and click each additional column heading.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	4.3 – Resources: Managing Data and Resources.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the importance of data entry guidelines.2. Identify common data.3. Manage all incidents as one.4. Manage incidents separately.5. Add Resources (Aircraft, Overhead, Crews, Equipment).6. Create a Strike Team/Task Force Parent Record.7. Attach new resources to a Strike Team/Task Force Parent Record.8. Attach existing resources to a Strike Team/Task Force Parent Record.9. Edit Resources (Aircraft, Overhead, Crews, Equipment).10. Refresh Data11. Delete Resources

I. MANAGE RESOURCES

- A. Identify the importance of data entry guidelines.
- B. Identify common data.
- C. Manage all incidents as one.
- D. Manage incidents separately.
- E. Add Resources (Aircraft, Overhead, Crews, Equipment) using an ICS 211 or optional check in form.
- F. Create a Strike Team/Task Force (Parent Record).
- G. Attach new resources to a Strike Team/Task Force Parent – Method 1.
- H. Attach existing resources to a Strike Team/Task Force Parent – Method 2.
- I. Edit Resources
- J. Refresh Data
- K. Delete Resources

II. DATA ENTRY GUIDELINES

- A. Review and discuss the importance of data entry guidelines.

NOTE: ROSS Import data will follow ROSS data standards. ROSS information that is imported into I-Suite includes Resource Name, Request Number, and Mob Date. It may also include Agency, HomeUnit, KindCode, and JetPort if they are defined in ROSS.

Make sure you check the imported ROSS information at check-in for accuracy. There may be incorrect or missing data. Also check Crew Rosters with the CRWB.

NOTE: If you are working with a team, follow the team's protocol or Standard Operating Procedures for data entry.

1. In **Resources**, data is organized and presented based on the ICS 211 form.
2. Before saving a resource, you must define the required information.

NOTE: If information is required, an asterisk (*) displays to the left of the label.

This required information includes:

- a. Request Number.

NOTE: The request number must begin with one of the following letters: **A, C, E, I, O, or S.**

- b. Account Code.
- c. Resource Name.
- d. Kind/Position.

- e. Status.
- f. Configuration.
- g. When Status is D, Actual Release Date.

NOTE: The **Agency** and **Unit ID** are important fields, but they are not required. Entering incorrect data in these fields is worse than having no data defined. An incorrect **Agency** code will generate incorrect **Cost** data.

- 3. Before rostering resources or adding additional qualifications, you must define the required information and save the resource.

III. COMMON DATA

A. To review common data:

- 1. From the **Modules** drop-down menu, select **Resources**.

OR

Click the **Resources** button in the **Main** toolbar.

- 2. On the **Resources** window, click the **Add** button.

NOTE: Entry items located above the tabs (i.e. just below the **Manage Resource – Add Mode** label) are common to all I-Suite modules.

NOTE: Data entry items for specific modules are located on their respective tabs (i.e. on the **Plans**, **Cost**, and **Time** tabs). The tabs that display are based on the rights assigned to the user.

NOTE: Resources is the primary data entry point for I-Suite data. The quality of the initial data is critical to successful integration of the data in other I-Suite modules.

NOTE: Understanding the concept of data sharing is critical. Data is shared between all I-Suite modules. Changes, additions, or deletions from any functional area effects the other I-Suite modules. Successful integration requires cooperation and established Data Ownership Rules. If you are working with a team, follow the team's protocol or Standard Operating Procedures for data entry.

IV. MANAGE INCIDENTS

A. To Manage all incidents as one:

NOTE: This is used if multiple incidents are created in the same database.

- 1. On the top right side of the window, click to check the **Manage All Incidents As One** checkbox.
- 2. When the **Manage All Incidents as One** message displays, click the **OK** button.

NOTE: When adding a resource with **Manage All Incidents As One** selected, an **Incident Name** drop-down box displays on the **Manage Resource – Add Mode** window. Verify that

the correct incident appears in the **Incident Name** box.

B. Manage incidents separately.

1. On the top right side of the window, click to uncheck the **Manage All Incidents As One** checkbox.

2. From the **Incident** drop-down list, select the **Incident** you want to manage.

NOTE: When **Managing Incidents Separately**, make sure you verify that the correct incident is selected in the **Incident** box.

V. ADD RESOURCES

A. To add Resources (Aircraft, Overhead, Crews, Equipment) using an ICS 211 or optional check-in form:

1. Open the **Resources** module.

2. Click the **Add** button in the **Main** toolbar.

3. On the **Manage Resource – Add Mode** window, enter the following information:

a. Request Number

b. Account Code

c. Resource Name

NOTE: When the **Person** checkbox is checked, **Resource Name** is replaced with **Last Name** and **First Name**. On the **Plans** tab, an **Other Quals** section displays.

d. Cell Phone

e. Kind/Position

f. Trainee checkbox (Optional)

g. Status

h. Unit ID (Optional)

i. Agency (Optional)

d. Configuration

e. Actual Release Date (Optional when Status is not D)

f. Actual Release Time (Optional)

4. On the **Plans** tab, define the following information, as needed:

NOTE: The **Plans** tab only displays when the user has Resource rights.

a. Check-In Date

NOTE: When the Check-In Date is more than 5 days prior to the system date, a warning message will be displayed

- b. Check-In Time
- c. Num Personnel
- d. Demob City
- e. Demob State
- f. Jetport
- g. Travel Method

NOTE: When the **Travel Method** is **Air** or **A/R**, a **Travel Questions** button displays beneath the **Travel Method** field. Click the button to respond to **Travel Questions** for the resource.

- a. Mobilization Date
- b. First Work Day
- c. Length of Assignment (Days)
- d. Demobilization Date

NOTE: The **Demobilization Date** is calculated from the **First Work Day** and **Length of Assignment**. Discuss with your Resource Unit Leader.

- k. Other (1, 2, & 3)
- l. Vehicle ID
- m. Original Order/Request Number
- n. Incident Card #

NOTE: The **Incident Card #** is only applicable for the Supply Pilot Release. If your team is currently part of the Supply Pilot, you can either enter the incident card number for a resource into the Incident Card # box or scan the number on the resource's incident card. If you enter the number, you only need to enter the actual numeric digit. You do not need to enter any leading zeros or the underscore and letter at the beginning of the number (e.g., for the number _P000000004, you would only need to enter 4).

- k. Plans Remarks

4. Click the **Save** button.

5. To enter other quals for a person:

- a. Under **Other Quals**, select the appropriate kind code from the **Kind Code** drop-down list.
- b. If the person is a trainee for the selected kind code, click to check the **Trainee** checkbox.
- c. To save other quals, click the **Save Quals** button.

6. To roster a person to a resource:

NOTE: The **Person** checkbox must be unchecked to Roster a person to a resource.

NOTE: To Roster a person, the resource must be saved.

- a. Click the **Roster** button.
- b. On the **Roster Resource – Add Mode** area, enter the appropriate information for the person being rostered to the resource including:
 - Request Number
 - Leader checkbox (Optional)
 - Last Name
 - First Name
 - Cell Phone
 - Kind/Position
 - Trainee checkbox (Optional)
 - Status
 - Unit ID (Optional)
 - Agency (Optional)
 - Actual Release Date (Optional when Status is not D)
 - Actual Release Time (Optional)
- c. On the **Plans** tab, enter the following information, as needed:
 - Check-in Date
 - Check-in Time
 - Demob City
 - Demob State
 - Jetport
 - Travel Method
 - Mobilization Date
 - First Work Day
 - Demobilization Date
 - Other 1
 - Other 2

- Other 3
- Vehicle ID
- Original Order/Request Number
- Plans Remarks
- Other Quals

NOTE: The **Plans** tab only displays when the user has **Plan** rights.

- d. On the **Time** tab, enter the appropriate Time data.

NOTE: The **Time** tab only displays when the user has Time rights.

- e. On the **Cost** tab, enter the appropriate Cost data.

NOTE: The **Cost** tab only displays when the user has **Cost** rights.

- e. Click the **Save** button.

NOTE: There are two methods for creating a Strike Team/Task Force. Use the **First Method** when a group of resources not defined in the I-Suite database was ordered as a Strike Team/Task Force.

Use the **Second Method** when assembling a Strike Team/Task Force at the incident from resources that already exist in the I-Suite database.

Both methods require you to create a **Parent Record** or **Place Holder**. You then need to add or attach the **Strike Team/Task Force Components** to the Parent Record.

B. Create a Strike Team/Task Force (Parent Record).

1. Open the **Resources** module.
2. Click the **Add** button in the **Main** toolbar.
3. On the **Manage Resource – Add Mode** window, enter the appropriate information, including ALL required information.
 - a. When selecting the **Kind/Position**, select a type applicable to the type of Strike Team (e.g. select “ES3” for a type 3 strike team).
 - b. When selecting the **Configuration**, select **S/T**. Notice that the label **Manage Resources – Add Mode** changes to **Add Strike Team / Task Force**. The **Roster** button is replaced with two new buttons for adding components.

NOTE: You cannot roster people to a Strike Team / Task Force parent.

- c. On the **Plans** and other tabs, complete the information, as needed.
4. To complete the Strike Team/Task Force parent record, continue with **Method 1** or **Method 2**.

NOTE: Use Method 1 to add Strike Team Or Task Force Components that do not already exist in the I-Suite database.

NOTE: If you add the Strike Team Leader last, you will not have to change the KindCode.

C. To attach new resources to a **Strike Team/Task Force Parent – Method 1:**

1. On the **Add Strike Team/Task Force** window, click the **Add New Component** button.
2. When the **Add New Strike Team/Task Force** message displays, click **Yes** to save the parent record.
3. On the **Add New Strike Team/Task Force Component** window, enter the appropriate common information.

NOTE: The **Configuration** defaults to **C** for component.

4. On the **Plans** tab and other tabs, complete the information, as appropriate.

NOTE: In the **Num Personnel** box, type the total number of people on the Strike Team/Task Force component.

5. **Roster** crew members, as needed.
6. To save the **Strike Team/Task Force Component** after entering the appropriate information, including ALL required information, click the **Save** button.
7. When the **Data Saved** message displays, click the **OK** button.
8. Continue adding components, as needed.
9. After adding the final component, click the **Close** button.

NOTE: Several boxes are automatically completed based on the Parent Record. Review this information for accuracy. Make sure you change the **Kind Code** when Rostering people.

NOTE: Use **Method 2** to add Strike Team or Task Force Components that already exist in the I-Suite database.

D. To attach existing resources to a **Strike Team/Task Force Parent – Method 2:**

1. On the **Add Strike Team/Task Force** window, click the **Add Existing Resource** button.
2. When the **Add Strike Team/Task Force** message displays, click the **Yes** button to save the parent record.
3. On the **Add Existing Strike Team/Task Force Component** window, click one or more resources listed in the grid to add to the Strike Team/Task Force. Then click the **Add** button.
4. Repeat step 3 for each resource you want to add to the Strike team/Task Force.

NOTE: If you want to remove a resource that was added to the Strike/Team Task force, click the resource in the grid at the top of the window. Then click the **Remove Component(s)**

button that displays beneath the grid.

5. After adding all appropriate components to the Strike Team/Task Force, click the **Close** button.

VI. EDIT RESOURCES

A. Edit Resources (Aircraft, Overhead, Crews, Equipment).

1. Open the **Resources** module.
2. In the **Resources** grid, click to select the resource you want to edit.
3. Click the **Edit** button in the **Main** toolbar.
4. On the **Manage Resource - Edit Mode** window, edit the appropriate information.
5. Click the **Save** button to save your changes.

B. Refresh Data.

1. Click the **Refresh** button in the toolbar.

C. Delete a Resource.

1. Open the **Resources** module.
2. In the **Resources** grid, click to select the resource you want to delete.
3. Click the **Delete** button in the **Main** toolbar.
4. Review the delete warning message.
5. To commit the delete request, click the **Yes** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	4.4 – Resources: Resources Reports.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Run and print standard reports.

I. RESOURCE REPORTS

A. Run and print standard reports.

II. PRINT RESOURCE REPORTS

A. Run and print standard Resource reports.

NOTE: I-Suite includes a number of features you can use to produce standard Resource reports.

1. Click the **Reports** button in the toolbar. Then click to select the **Plans** tab.

OR

From the **Reports** drop-down menu, select **Plans Reports**.

2. Under **Reports**, click to select one of the following reports:

- a. **Aircraft Report** - This report identifies the aircraft on the incident. You can print the report for:
 - aircraft that is checked-in, pending, or in staging,
 - demobed or reassigned aircraft,
 - aircraft pending demob,
 - aircraft that is not demobed,
 - filled aircraft assignments,
 - unfilled aircraft assignments,
 - or all aircraft resources.
- b. **Crew Report** - This report identifies the crews on the incident. You can print the report for:
 - crews that are checked-in, pending, or in staging demobed or reassigned crews,
 - crews pending demob,
 - crews that are not demobed,
 - filled crew assignments,
 - unfilled crew assignments,
 - or all crew resources.

- c. **Equipment Report** - This report identifies the equipment on the incident. You can print the report for:
- equipment that is checked-in, pending, or in staging,
 - demobed or reassigned equipment,
 - equipment pending demob,
 - equipment that is not demobed,
 - filled equipment assignments,
 - unfilled equipment assignments,
 - or all equipment resources.
- d. **Overhead Report** - This report identifies the overhead personnel on the incident. You can print the report for:
- overhead personnel that are checked-in, pending, or in staging,
 - demobed or reassigned overhead personnel,
 - overhead personnel pending demob,
 - overhead personnel that are not demobed,
 - filled overhead personnel assignments,
 - unfilled overhead personnel assignments,
 - or all overhead personnel resources.
- e. **209 Resource List** - This report contains ICS-209 information for Block 29 of the FAMWEB ICS 209 generated by the Situation Unit Leader.

NOTE: The 209 Report uses the number of people from the Strike Team/Task Force parent.

- f. **Qualifications Report** - This report identifies the positions/kind codes defined in the I-Suite database and those resources that are assigned to the positions. You can filter the information in this report to include:
- One, several, or all kind codes.

NOTE: If the **All Kinds** checkbox is checked, all kinds are included. If the **All Kinds** checkbox is not checked, only those kinds listed under **Selected Kinds** are included. To include a kind, click the kind under **Kind Codes**. Then click the > button to move it under **Selected Kinds**.

NOTE: Use the **Kind Search** filter box to quickly find kind codes to use as a filter. When you enter data into this box, the kind code that matches is highlighted. Click the > button to move

the kind under **Selected Kinds**.

- No Trainees (Exclude Trainees)
- Trainees Only

NOTE: An asterisk (*) notes that the person is currently assigned to that position.

- Section Report** - This report identifies those resources assigned to different sections (e.g. Command Staff, Operations Section, etc.).
- ST/TF Report** - This report identifies the members of the Strike Teams and Task Forces that were included in the report. You can only include Strike Teams and Task Forces that are currently active (e.g., Check-In, Pending Demob) at the selected incident.

3. For the **Report** you selected in step 2, complete the **Report Settings**, as appropriate. Several of the reports include the following options:

NOTE: Some standard reports do not have **Report Settings** (i.e. the 209).

- Under **Sort**, click to select the sorts to use when creating the report. Click the sort options in the order in which you want the information sorted.
 - If you want to include the Strike Team/Task Force Components in the report, click to check the **Include strike team/task force components** checkbox.
 - If you want to include sub-totals for the first sort that you selected, click to check the **Subtotals on first sort** checkbox.
4. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.
5. To print the report without previewing, click the **Print** button.



UNIT 5

I-Suite Demob

7/12/2013

Table of Contents

Unit 5

I-Suite Demob

5.0 – Demob: Overview.

1. Identify the Demob Module's Purpose.
2. Identify Demob Options.

5.1 – Demob: Options.

1. Select Demob Grid Columns and set order.
2. Customize the Checkout Form (ICS 221).
3. Select Travel Questions and set order.

5.2 – Demob: Demob a Resource.

1. Demob a Resource, which includes:

5.3 – Demob: Demob Reports.

1. Generate reports using the Demob report buttons.
2. Generate standard Demob reports.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	5.0 – Demob: Overview.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the Demob Module's Purpose.2. Identify Demob Options.

I. DEMOB

A. Identify the Demob module's purpose.

NOTE: The Demob module shares data with other I-Suite Modules.

1. The primary purpose of the Demob module is to assist in preplanning and demobilization of resources.

II. DEMOB WINDOW

A. Review the Demob window:

1. Demob Toolbar.

- a. **P** Button (Group Pending) - Click a group of resources in the grid. Then click the **P** button to change the status of the selected group to **Pending**.
- b. **D** Button (Group Demob) - Click a group of resources in the grid. Then click the **D** button to change the status of the selected group to **Demobed**.

NOTE: When you click either the **P** or **D** button, the **Save** button changes to **Save & Next**. You must click this button to save the changed status to the resource and make changes to the grid. When you click the **Save & Next** button, the changes are saved and the next selected record displays.

- c. **N** Button (No Grouping) - If you have used the **P** or **D** button to change the status of a group of resources, you can change the status back by clicking the **N** button. You must click the **N** button before saving any changes to the resources. If you saved the status change to a resource, it will not be changed back to the original status code.
- d. **Demob Report** Buttons - Prints the following reports when you click the respective buttons:
 - Tentative Poster
 - Available for Release
 - Air Travel Request
 - Check Out
 - Actual Demob
 - Ground Support
- e. **Resources Selected in Grid** - When this checkbox is checked and you click a Report Button, the report is generated for the resource(s) selected in the grid.

2. The **Resources** grid contains a list of the resources currently in the I-Suite database.

3. **Demobilization** information for a Resource is automatically defined on the left side of

the window.

- a. Select an Equipment or Crew Resource – No Quals display.

4. **Tentative Release** information for a resource is defined in the middle section of the window.

- a. All tentative information is entered here.
- b. Select **Return Travel Method** of **A/R** or **AIR** – Additional information about Air Travel displays.

5. **Actual Release** information is defined on the right side of the window.

- a. All actual information is entered here.

6. The following buttons display at the bottom of the **Demob** window:

- a. **Close** - Closes the Demob window.
- b. **Previous** - Moves to the previous record in the Resources grid.
- c. **Next** - Moves to the next record in the Resources grid.
- d. **Save** - Saves any changes made to the Demob information.

7. You can print additional reports by selecting the **Reports** drop-down menu, and then clicking **Demob Reports**.

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 5.1 – Demob: Options.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Select Demob Grid Columns and set order.
 2. Customize the Checkout Form (ICS 221).
 3. Select Travel Questions and set order.

I. DEMOB OPTIONS

- A. Select Demob Grid Columns and set order.
- B. Customize the Checkout Form (ICS 221).
- C. Select Travel Questions and set order.

II. RESOURCE GRID

- A. To identify the columns to display in the grid and the order in which to display them:
 1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
 2. Click the **Demob** tab. Then click to select the lower **Demob** tab.
 3. Under **Resource Grid Columns**, click to check the checkbox next to each of the columns you want to display in the Resources grid.

NOTE: You can also click to highlight a column, and then click the **Show** button to display that column in the grid. If you want to remove the selected columns from the **Resources** grid, click the **Hide** button.

4. To adjust the order in which the columns display on the **Demob** window, click a column. Then click the **Move Up** or **Move Down** button to move the column.
5. When you have made all of your changes, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

III. CHECKOUT

- A. To customize the Checkout Form (ICS 221):
 1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
 2. Click the **Demob** tab. Then click to select the **Checkout** tab.
 3. Under the **Logistics Section**, click to check each of the options you want to include in the Logistics section of form ICS-221. You can include:
 - a. Supply Unit
 - b. Communications Unit
 - c. Facilities Unit
 - d. Ground Support Unit.
 4. If you want to include the **Documentation Unit** in the **Planning Section** of the ICS-221 form, click to check the **Documentation Unit** checkbox.
 5. If you want to include the **Demob Unit** in the **Planning Section** of the ICS-221 form, click to check the **Demob Unit** checkbox.
 6. If you want to include the **Time Unit** in the **Finance Section** of the ICS-221 form, click to check the **Time Unit** checkbox.
 7. If you want to include the **Security Unit** in the **Other Section** of the ICS-221 form,

click to check the **Security Unit** checkbox.

8. To include additional information in the **Other Section** of the ICS-221 form, type the name of the option in either of the blank boxes under the **Other Section**. When the name is defined, click to check the checkbox next to the option to select it.

NOTE: An example of additional information is "**Washing Station**."

9. When finished, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

IV. TRAVEL QUESTIONS

A. To select Travel Questions and set the order:

1. From the **Tools** drop-down menu, select **Options**.
2. On the **Options** window, click the **Demob** tab. Then click to select the **Travel Questions** tab.
3. To display a listed question in the **Air Travel** grid for **Demob**, click to check the **Display** checkbox next to the question.
4. To adjust the order in which a travel question displays, click to select the **Question**, and then click the **Move Up** or **Move Down** button to adjust the order.
5. To add a new travel question:

NOTE: You must click in the grid for the **Add** button to display.

- a. Click the **Add** button.
 - b. In the **Question** box, enter your new travel question.
 - c. Click to check the **Display** checkbox, if appropriate.
 - d. Click the **Save** button to save the new question.
6. When finished, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

NOTE: Travel Questions only display in **Demob** if the **Travel Method** for the selected resource(s) is defined as **AIR** or **A/R** (Air with Rental) in the **Common Data** or **Tentative Release** areas. Travel questions and answers print on the **Commercial Air Travel Request Form**.

NOTE: If you uncheck **Display** for a **Travel Question**, the responses to the question no longer display. Although the responses do not display, they are still saved in the database.

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 5.2 – Demob: Demob a Resource.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Demob a Resource, which includes:
 - Defining demobilization information for a resource.
 - Defining tentative release information for a resource.
 - Defining actual release information for a resource.

I. DEMOB RESOURCES

- A. Define demobilization information for a resource.
- B. Define tentative release information for a resource.
- C. Define actual release information for a resource.

II. DEMOB INFORMATION

- A. To define demobilization information for a resource:
 - 1. From the **Modules** drop-down menu, select **Demob**.

OR

Click the **Demob** button in the **Main** toolbar.

- 2. In the **Resources** grid, click to select the appropriate resource.

NOTE: To remove demobed resources from the Resources grid, click to check the **Exclude Demobed** checkbox. To only display those resources that were demobed in the Resources grid, click to check the **Demobed Only** checkbox.

- 3. On the **Demob** window, check the following resource information that is auto-filled on the left side of the window. Enter any missing information.
 - a. Status
 - b. Demob City
 - c. Demob State
 - d. Jetport
 - e. Travel Method
 - f. Mobilization Date
 - g. First Work Day

NOTE: When you enter a **First Work Day** and **Length of Assignment (Days)**, the system automatically calculates the **Demobilization Date** and inserts it into the **Demobilization Date** box. To change this date, increase or decrease the **Length of Assignment Days** by the number of days needed to adjust the **Demobilization Date**. This is important if you are creating **Demob Reports** from the Demob data (e.g. Last Day Work). Some Demob Dates may need to be adjusted to reflect the current incident status (e.g. rain putting the fire out).

- h. Length of Assignment (Days).
 - i. Plans Remarks.
 - j. If the resource is a person, enter the appropriate information in the **Other Quals** area.

4. When finished, click the **Save** button to save your changes.

NOTE: If you need to edit **Common Data** that does not appear on the Demob window (e.g. Unit ID), click the resource in the grid. Then click the **Edit** button in the **Main** toolbar. Edit the information in the **Manage Resource - Edit Mode** area that displays. Follow incident established protocols or Standard Operating Procedures when editing any incident data.

III. TENTATIVE RELEASE INFORMATION

A. To define tentative release information for a resource:

1. In the **Resources** grid on the Demob window, click to select the appropriate resource.

2. Under **Tentative Release**, enter the following information:

a. Available for Reassignment

NOTE: When the **Available for Reassignment** checkbox is checked, **Y** (for Yes) displays in the **Available for Release Report**, along with additional **Quals**. This information will also display on the Commercial Air Travel Request.

b. Tentative Release Date (trigger for resource being listed on Tentative Poster and Available for Release report.)

c. Tentative Release Time

d. Return Travel Method (auto-fills from Common Data.)

NOTE: If the **Return Travel Method** is different from the **Arrival Travel Method**, make sure you change the entry in this box. This is important when you are creating **Travel Method Reports**.

e. Remarks (if necessary)

NOTE: If your remarks will not fit in the **Remarks** box, click the **Remarks** button to display a **Tentative Release Remarks** window where you can enter additional remarks.

NOTE: Remarks do not print on the **Available for Release Report**.

f. Dispatch Notified.

NOTE: When the **Dispatch Notified** checkbox is checked, the resource will no longer be included in the **Available for Release Reports**. The assumption is that the report will be faxed to **Dispatch**. This resource should not be sent in again. If the resource needs to be sent again, click to check the **Resources Selected in Grid** checkbox, then select the resource in the grid. Click the **Available for Release** button to print the report again.

g. If the **Return Travel** method is **A/R** or **AIR**, add air travel information in the area that displays at the bottom of the window. This information generates the **Commercial Air Travel Request**.

- **Name on Picture ID** - For Airline security, there must be a legal name on reservations.

- **Depart from Jetport (Local to Incident)** - This is the jetport from which the resource is departing.
- **Travel time from ICP to Airport (Hours) (Minutes)** - This is important information for Ground Support in scheduling shuttles to an airport.
- **Special Instructions**

NOTE: If your **Special Instructions** will not fit in the box, click the **Special Instructions** button to display a **Special Instructions** window where you can enter additional instructions. **Special Instructions** print on the Commercial Air Travel Request Form. However, you can only fill the window 1/3 in order for the information to print on the form. Preview the form and make adjustments to the information before printing.

- If an air travel request is sent to dispatch, click to check the **Air Travel to Dispatch** checkbox.
- If you received an itinerary from dispatch, click to check the **Itinerary Received From Dispatch** checkbox.

NOTE: Click to check the checkbox next to each travel question for which a **Yes** response is appropriate.

3. When finished, click the **Save** button to save your changes.

IV. ACTUAL RELEASE INFORMATION

A. To define actual release information for a resource:

1. In the **Resources** grid on the Demob window, click to select the appropriate resource.
2. Under **Actual Release**, enter the following information:
 - a. Actual Release Date

NOTE: Cannot enter an **Actual Release Date** unless the **Status** code is **D** or **R**. When the **Status** is **D**, the **Actual Release Date** is required. When **Actual Release Date** is more than 5 days after the system date a warning message will be displayed.

- b. Actual Time of Departure
- c. Estimated Date of Arrival

NOTE: Cannot enter an **Estimated Date of Arrival** unless the **Status** code is **D** or **R**. When **Estimated Date of Arrival** is more than 5 days after the system date a warning message will be displayed.

- d. Estimated Time of Arrival
- e. Rest Over Night

NOTE: When the **Rest Over Night** checkbox is checked, the system prints **RON location** information on the **Actual Demob Report**.

f. Remarks (if necessary)

NOTE: If your remarks will not fit in the **Remarks** box, click the **Remarks** button to display an **Actual Release Remarks** window where you can enter additional remarks.

NOTE: Remarks do not print on the **Actual Demob Report**.

g. Dispatch Notified

NOTE: When the **Dispatch Notified** checkbox is checked, the resource will no longer be included in the **Actual Demob Reports**. The assumption is that the report will be faxed to **Dispatch**. This resource should not be sent in again. If the resource needs to be sent again, click to check the **Resources Selected in Grid** checkbox, then select the resource in the grid. Click the **Actual Demob** button to print the report again.

3. When finished, click the **Save** button to save your changes.

STUDENT MANUAL

COURSE:

I-Suite

UNIT:

5.3 – Demob: Demob Reports.

OBJECTIVES:

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

1. Generate reports using the Demob report buttons.
2. Generate standard Demob reports.

I. DEMOB REPORTS

- A. Generate reports using the Demob report buttons.
- B. Generate standard Demob reports.

II. DEMOB REPORT BUTTONS

- A. Generate reports using the Demob report buttons.

NOTE: You can print some of the Demob reports from the main Demob window.

NOTE: To only include Resources selected in the grid, click to check the **Resources Selected In Grid** checkbox. This overrides any other requirements or parameters defined for a report.

1. In the **Demob** toolbar, click one of the following **Demob** buttons to print the defined report:

NOTE: For descriptions of these reports, refer to section **III. Standard Demob Reports**.

- a. Tentative Poster
- b. Available for Release
- c. Air Travel Request
- d. Check Out
- e. Actual Demob
- f. Ground Support.

NOTE: When you click one of these buttons, the report automatically displays in the **Preview** window. To print the report, click the **Print Report** button on the **Preview** window. If you want to define parameters for printing the report, use the options on the **Demob Report** window, rather than the report buttons on the **Demob** window. For these instructions refer to section **III. Standard Demob Reports**.

III. STANDARD DEMOB REPORTS

NOTE: There are several options in I-Suite you can use to print Standard reports.

NOTE: If the **Resources Selected in Grid** checkbox is checked, the report prints for the Resource(s) selected in the grid, regardless of the requirements.

- A. To generate standard Demob reports:

1. From the **Demob** module, click the **Reports** button in the **Main** toolbar to open the **Demob Reports** window.

OR

From the **Reports** drop-down menu, select **Demob Reports** to open the **Demob Reports** window.

OR

Click one of the **Demob Report** buttons.

2. Click to select one of the following reports:

- a. **Checkout Form** - The Demobilization Checkout Form (ICS-221) is completed for a resource that is being demobilized. Demobilization Checkout Forms are only generated for resources that do NOT have a checkmark in the **Checkout Form Printed** checkbox.

To generate a Checkout Form:

- Under **Sort**, double click each sort to use in the report. The **Sort** moves from the left frame to the right frame. The sort order is based on the order in which you select the sort options.
- To remove a selected sort, click the sort you want to remove in the right frame under **Sort**. Then click the < button.
- To customize the Checkout Form, click the **Customize Checkout Form** button. Then refer to instructions in the **Options** section (5.1) for customizing the Checkout form.
- To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
- To preview or print the report, click the **Preview** or **Print** button.

NOTE: If you click the **Checkout** button and the **Resource Selected in Grid** option is NOT checked, a message displays indicating that **All Resources That Have Not Had a Checkout Form Printed (#) Will Be Printed**.

- o If you click the **Yes** button to continue, a checkout form is printed for the number of resources indicated. The forms do not print in any particular order. Make sure this is what you want to do before clicking the **Yes** button.
- o If you click the **No** button, no action occurs.

To print individual forms, click to check the **Resources Selected in Grid** option. Select specific resources. Then click the **Checkout** button.

Use the **Demob Report** window to print sorted checkout forms. A message displays indicating that **All Resources That Have Not Had a Checkout Form Printed (#) Will Be Printed**. Selected individual forms cannot be printed from this window.

NOTE: If a resource has a supply item that is not consumable issued to them in the Supply Module in I-Suite and an ICS 221 Checkout Form is printed for them, a statement prints on the Checkout Form indicating that the resource or one of its subordinates has supply items

issued to them.

NOTE: After a checkout form prints for a resource, the message “**Do you want to automatically check the Checkout Form Checkbox?**” displays. Click to check **Yes**, which prevents the form from being printed again. If you need to print another form for that resource, click to check the **Resources Selected in The Grid** checkbox. Select the resource in the grid and print the form.

- b. **Demob Planning Report** - This report identifies resources and their current status for the incident.

To generate a Demob Planning Report:

- Under **Select**, click to select the resource status category to include in the report.
 - Under **Sort**, double click to select each sort to use in the report. The **Sort** moves from the left frame to the right frame. The sort order is based on the order in which you select the sort options.
 - To remove a selected sort, click the sort you want to remove in the right column under **Sort**. Then click the < button.
 - To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
 - To include subtotals on the first sort, click to check the **Subtotals on first sort** checkbox.
 - To preview or print the report, click the **Preview** or **Print** button.
- c. **Mob/Demob Report** - This report identifies those resources that were demobilized.
- To identify how the report is organized, click to select **By Section, By Resource Kind, or By Demobilization Date**.
 - To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
 - To preview or print the report, click the **Preview** or **Print** button.
- d. **Qualifications Report** - This report identifies the positions/kind codes defined in the I-Suite system and those resources that are assigned to the positions.

To generate a Qualifications Report:

- Click to select the **Qualifications Report** option.
- To only include certain kind codes in the report, double click a

kind code under **Kind Codes** to move it under **Selected Kinds**.
To include all kind codes, click the **All Kinds** option.

NOTE: Use the **Kind Search** filter box to quickly find kind codes to use as a filter. When you enter data into this box, the kind code that matches is highlighted.

- If you do not want to include Trainees in the report, click the **Exclude Trainees** option. If you want to only include Trainees in the report, click the **Trainees Only** option.
 - To preview or print the report, click the **Preview** or **Print** button.
- e. **Section Report** - This report identifies those resources assigned to different sections (i.e. Command Staff, Operations Section, etc.).
- Under **Sort**, double click to select each sort to use in the report. The **Sort** moves from the left frame to the right frame. The sort order is based on the order in which you select the sort options.
 - To remove a selected sort, click the sort you want to remove in the right column under **Sort**. Then click the < button.
 - To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
 - To preview or print the report, click the **Preview** or **Print** button.
- f. **Tentative Poster** - This report identifies those resources that are tentatively ready to be released. Only those resources that meet the following requirements are included in the report, unless the **Resources Selected In Grid** checkbox is checked:
- The Resource **Type** is **C**, **E**, **O**, or **A**.
 - The Resource contains a **Tentative Release Date** and **Time**.

NOTE: If the Tentative Poster does not print, double check the **Tentative Release Date** and **Time**. This information is critical for generating the Poster.

- The **Release Date** is within a specified date range (when using a date range).
- The **Status** is not **D** (Demob).

NOTE: The I-Suite system only excludes resources with a **D Status** when printing the Tentative Poster from the **Demob Reports** screen. If a user selects a resource in the **Resource** grid that has a **D Status** and then clicks the **Tentative Poster** button on the **Demob** screen, the I-Suite System will print the **Tentative Poster**, regardless of the **D Status**.

To generate a Tentative Poster:

- In the **Date Range** boxes, enter the range of dates to include in the

report.

- To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
- To preview or print the report, click the **Preview** or **Print** button.

NOTE: Each **Calendar Date** prints on a separate page with resources grouped by **E, O, C,** or **A's** being released for each day of the report.

NOTE: This is the poster that most teams print on the poster size paper.

NOTE: If a resource appears on the **Tentative Demob Poster** that was actually **Demobed**, the **Tentative Demob Date** may be later than the **Actual Demob Date** (i.e. resource left earlier than planned). Change the **Tentative Demob Date** to the same or a previous date to the actual demob date and the resource will not be included on the poster. This will only occur if the user selects a resource with a **D Status** in the **Resource** grid and clicks the **Tentative Poster** button on the **Demob** screen.

- g. **Available for Release** - This report identifies those resources that are available for release. Only those resources that meet the following requirements are included in the report, unless the **Resources Selected In Grid** checkbox is checked:
- The Resource **Type** is **C, E, O,** or **A.**
 - The Resource **Status** is not **D** (Demobed).
 - The **Dispatch Notified** checkbox is not checked.
 - The Resource contains a **Tentative Release Date** and **Time.**

NOTE: If the Available for Release report does not print for the resource, double check the **Tentative Release Date** and **Time.** This information is critical for generating this report.

To print an Available for Release report:

- To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
- To preview or print the report, click the **Preview** or **Print** button.
- When the prompt displays asking whether you want to automatically check the **Dispatch Notified of Tentative Release** checkbox, click the **Yes** button if you want to check it. Click the **No** button if you do not want to check it.

NOTE: If you want to reprint an **Available for Release** report, click to check the **Reprint** checkbox on the **Select Report** window. Then select the date and time when it was originally printed from the **Date Time Printed** drop-down list. To assign a new date to the report, click to check the **New Print Date** checkbox. Then click the **Preview** or **Print** button to print or

preview the report.

h. **Air Travel Request** - This form is used to request commercial air travel. A form only prints for those resources that meet the following requirements, unless the **Resources Selected In Grid** checkbox is checked:

- The Resource **Status** is **P** (Pending).
- The **Return Travel Method** for the resource is **A/R** or **Air**.
- The **Air Travel to Dispatch** checkbox is not checked.

The following **Tentative Release** information must be defined to avoid printing blank fields in the **Commercial Air Travel Request** form:

- Tentative Release Date and Time
- Resource Name (may auto-fill - check against the name on the resource's picture ID. Fill-in if this does not auto-fill.)
- Departing Airport Code (usually closest to the incident or where the rental car was rented)
- Special Remarks (e.g. aisle seat because leg is in splint.)
- Travel Time (Hours) (Minutes) from the incident to the Departure airport.
- Travel Questions - Click to check the checkbox next to each question for which a **Yes** response is appropriate. All questions and answers print.

The following additional items will print on the form if the data was entered:

- Resource Name
- Demob City, State
- Jetport (arrival airport from check-in information)
- If the **Reassignment** checkbox was checked under **Tentative Release** on the Demob window:
- **Reassignment Pending Demob** prints in the upper right corner. If the checkbox is not checked, only **Demob** prints.
- Last Date available to work. Based on Length of assignment entry calculating days remaining of tour. Returns last date of tour.
- Other quals will be listed.

To print an Air Travel Request Form:

- Click the **Air Travel Request** option on the **Select Report** window.

- To preview or print the report, click the **Preview** or **Print** button.
- When the prompt displays asking whether you want to automatically check the **Air travel to Dispatch checkbox**, click the **Yes** button to check it. Click the **No** button if you do not want to check it.

NOTE: Only generate and print one resource's **Commercial Air Travel Request** at a time. A separate form will print for each resource.

NOTE: Only **Special Instructions Remarks** print on this report. The **Expanded Special Remarks** box can only be filled about 1/3 full for all of the information to print on the **Commercial Air Travel Request Form**. Preview the form to make sure all information appears.

NOTE: The system does not automatically check the **Itinerary Received From Dispatch** checkbox. This is a manual operation. Use this box to track progress on air travel.

- i. **Last Work Day** - This report identifies those resources with last work days within a defined date range. Only those resources that meet the following requirements are included in the report, unless the **Resources Selected in Grid** checkbox is checked:
 - A **Tentative Release Date** or **Demobilization Date** is defined.
 - The calculated **Last Work Day** falls within the defined date range.
 - An **Actual Release Date** is not defined.
 - The **Status** is not **D** (Demobed).

To print a Last Work Day Report:

- In the **Grouping** box, select the grouping option to use in printing the report.
- In the **Date Range** boxes, enter the range of dates to include in the report.
- If you selected either the **Section, Date** or the **Section, RequestCat, Date** options in the **Group** box, select the sections to include in the report in the **Show Sections** box.
- Under **Sort**, double click to select each sort to use in the report. The **Sort** moves from the left frame to the right frame. The sort order is based on the order in which you select the sort options.
- To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
- To preview or print the report, click the **Preview** or **Print** button.

- j. **Actual Demob** - This report identifies those resources that have been released for demobilization. Only those resources that meet the following requirements are included in the report, unless the **Resources Selected In Grid** checkbox is checked:

- The Resource contains an **Actual Release Date and Time**.

NOTE: If the Actual Demob Report does not print for the resource, double check the **Actual Release Date and Time**. This information is critical for generating this report.

- The **Dispatch Notified of Actual Release** checkbox is not checked.

To print an Actual Demob Report:

- To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
- To preview or print the report, click the **Preview** or **Print** button.
- When the prompt displays asking whether you want to **automatically update the status of the resource(s) to d**, click the **Yes** button to run the update. Click the **No** button if you do not want to run the update.
- When the prompt displays asking whether to check the **Dispatch Notified of Actual Release checkbox**, click **Yes** to check it. Click **No** if you do not want to check it.

NOTE: A new page is produced for each request category on the Actual Demob Report.

NOTE: Make sure Finance has completed all payment work for the resource(s) before changing the **Status** to **D** or the record(s) will have to be undemobed to complete payment records. Demobed resource(s) should only appear in those reports for already demobed resources.

NOTE: You can Demob multiple resources at one time (e.g. an entire management team demobing). One way to do this is click to check the **Resources Selected in Grid** checkbox. Then select all of the resources you want to demob in the grid. Click the **Actual Demob** button on the **Demob** window. When prompted to **update the status to D**, click the **Yes** button. This automatically changes the **Status** of the selected resources to **D** (Demobed) AFTER you also click **Print** to print the report OR click to check the **Resources Selected in Grid** checkbox. Then select all of the resources you want to demob in the grid and click the **D** button. These processes assist in database cleanup at the end of incidents.

- j. **Ground Support** - This is a form that people can use to request ground support transportation. A form only prints for those resources that meet the following requirements, unless the **Resources Selected In Grid** checkbox is checked:

- The Resource **Status** is **NOT D** (Demobed).
- The Resource contains a **Tentative Release Date** .

NOTE: If the Ground Support Report does not print for the resource, double check the **Tentative Release Date**. This information is critical for generating this report. **Leave ICP Time** is generated by the **Tentative Release Time** in the Resource(s) record(s).

- The **Return Travel Method** for the Resource is **A/R** or **Air**.
- The **Is Ground Support transportation needed?** checkbox contains a check.
- The **Tentative Release Date** is within a specified date range (when using a date range).

NOTE: The **Form Date** is generated by the **Tentative Release Date(s)** selected in the **Date Range** boxes. All flight information has to be hand entered and is based on the itineraries received from dispatch.

To generate a Ground Support Report:

- In the **Date Range** boxes, enter a range of dates to include in the report.
- To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
- To preview or print the report, click the **Preview** or **Print** button.

NOTE: A separate report prints for each date there are resources needing transportation.



UNIT 6

Incident Action Plan

7/12/2013

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Incident Action Plan

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STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 6.0 – IAP: Overview.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Identify the purpose of the Incident Action Plan (IAP) module.
 2. Use the data in the I-Suite database to produce the Incident Action Plan.
 3. Produce various Incident Command System (ICS) forms.
 4. Use the “Master Frequency List” to define radio frequencies for the ICS 205.
 5. Identify Options on the IAP window.

I. INCIDENT ACTION PLAN

A. Access the Incident Action Plan (IAP) module.

NOTE: The IAP module shares data with other I-Suite modules.

B. The primary purpose of IAP is to produce an Incident Action Plan for the incident.

C. Use IAP to produce the following Incident Command System (ICS) forms:

1. ICS 202 – Incident Objectives.
2. ICS 203 – Organization Assignment List.
3. ICS 204 – Division Assignment List.
4. ICS 205 – Incident Radio Communications Plan.
5. ICS 206 – Medical Plan.
6. ICS 220 – Air Operations Summary.

E. IAP uses the **Master Frequency List** to define radio frequencies in the ICS 205 – Incident Radio Communications Plan.

F. Identify options on the IAP window:

1. The **IAP** toolbar includes the following buttons:
 - a. **Create New Form** - Click a form listed in the Tree View. Then click this button to create a new form that is the same type as the one that is highlighted. You can also click the Arrow next to this button to display a list from which you can select the form you want to create.
 - b. **Save** - Saves the form.

NOTE: The IAP module is the only module with the **Save** button in the module toolbar.

- c. **Spell Check** - Checks the form for spelling errors
- d. **Copy Form** - Displays a list of forms you can copy.
- e. **Copy Plan** - Displays a list of plans you can copy.
- f. **Manage By Plan** - Displays all forms grouped by an Incident Action Plan for a specific day and operational period.
- g. **Manage By Form** - Displays all forms grouped by form number. You can also use this button to only display a certain type of form.
- h. **Mark Final/Mark Draft** - When the form is marked **Draft**, this button changes it to **Final**. When the form is **Final**, this button changes it back to **Draft**.
- i. **Bold** - Bolds text selected in a form.
- j. **Italic** - Italicizes text selected in a form.

k. **Underline** - Underlines text selected in a form.

2. The following IAP Menus display at the top of the window:

- a. **File** - Use the options in this menu to Create a New Form, Export a Form to PDF, Export a Plan to PDF, Preview a Form, Print a Form, Preview a Plan, and Print a Plan.
- b. **Edit** - Use the options in this menu to edit forms. The options that are available include:
 - **Copy** - Select this option to copy a form.
 - **Cut** - Select this option to cut text that is highlighted in a form.
 - **Paste** - Select this option to paste text that was cut or copied into a form.
 - **Delete Form** - Select this option to delete a form.
 - **Format** - Use the options in this sub-menu to change the font style or underline text.
- c. **View** - Use the options in this menu to view forms. The following options are available:
 - **Form** - Select this option to display all forms in the Tree View.
 - **Individual Form** - When you select this option, a list of forms displays. Select a form from the list to only display those types of forms in the Tree View.
 - **Plan** - Select this option to display all forms grouped by Incident Action Plan.
- d. **Shifts** - Select the **Define Shifts** option in this menu to define shifts.
- e. **Tools** - Use the options in this menu to:
 - **Copy Form** - Displays a list of forms you can copy.
 - **Copy Plan** - Displays a list of plans you can copy.
 - **Spell Check** - Checks the form for spelling errors.
 - **Form 203 Template** - Used to customize the ICS-203 Form.
 - **Form 204 Template** - Used to customize the ICS-204 Form.
 - **Mark Final/Mark Draft** - When the form is marked **Draft**, this changes to **Final**. When the form is **Final**, this changes back to **Draft**.
 - **Master Frequency** - Creates the Master Frequency List.
- f. **Window** - When you select this menu, a list of forms that are currently open

displays. Click a form to make that form window active. Select **Close All Forms** to close all of the Form windows.

3. The **Tree View** displays on the left side of the window. You can change the information that displays in the Tree View by selecting one of the following options from the **View** drop-down menu:

NOTE: The forms in the **Tree View** are limited, based on whether **Manage All as One** is selected. If **Manage All as One** is selected, all forms display in the list. If a single incident is selected, only forms for that incident display in the list.

- a. **Form** - Select this option to display all forms in the Tree View.
- b. **Individual Form** - Select this option to view a specific form (e.g. Only ICS 203 forms) in the Tree View.
- c. **Plan** - Select this option to view plans in the Tree View.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	6.1 – IAP: Getting Started.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Define shifts.2. Use IAP Options.3. Set up and customize the ICS 203 template.4. Set up and customize the ICS 204 template.5. Create a Master Frequency List.6. Delete a frequency from the Master Frequency List.

I. SETTING UP IAP

- A. Define shifts.
- B. Define IAP Options.
- C. Set up and customize the ICS 203 template.
- D. Set up and customize the ICS 204 template.
- E. Create a Master Frequency List.
- F. Delete a frequency from the Master Frequency List.

II. SHIFTS

- A. To add a shift:

NOTE: Defining shifts is the first thing that must be done when creating an IAP.

1. From the **Modules** drop-down menu, select **IAP**.

OR

Click the **IAP** button on the toolbar.

2. From the **Shifts** drop-down menu, select **Define Shifts**.
3. On the **Incident Action Plan – Define Shifts** window, complete the following.
 - a. In the **Shift** box, type the name of the **Shift**.

EXAMPLE: Name the shift **DAY** or **NIGHT**.

- b. In the **Shift Start Time** box, type the starting time of the shift in the format 0000.

EXAMPLE: Type **0600**.

- c. In the **Shift End Time** box, type the ending time of the shift in the format 0000.
 - d. Under **Shift Shade**, click to select a shade to assign to the shift.

NOTE: The background shade of the shift listed under the **Shade** column in the **Shifts Entered** grid, illustrates the shade defined for the shift.

NOTE: The **Shade** assigned to a shift helps to identify the different shift forms (i.e. alleviates confusion between Day and Night shift forms).

NOTE: When creating a form for a certain operational period, the **Date/Time** box is color-coded with the **Shade** specified for that shift.

4. To save the new shift, click the **Save** button.

5. When finished, click the **Close** button.

NOTE: Before you save the shift record, you can click the **Clear** button to clear the Shift information that was defined. This removes any information from the Shift boxes. You can then enter the correct information. After you have saved the Shift record, the **Clear** button is no longer available.

B. To edit a Shift:

1. In the **Shifts Entered** grid, click the shift you want to edit.
2. Make the appropriate changes to the **Shifts** information that displays under **Edit Mode**.
3. Click the **Save** button to save your changes.

C. To delete a shift:

1. In the **Shifts Entered** grid, click the shift you want to delete.
2. Click the **Delete** button in the **Main** toolbar at the top of the window.

NOTE: If you add or edit Shifts at a later time, your changes are not visible until you click the **Refresh** button in the **Main** toolbar to refresh the data.

III. IAP OPTIONS

A. Define IAP Options.

1. Open the **IAP** module.
2. To identify the order in which to display the first and last names:

NOTE: Identify the order in which to display the name data before creating forms in IAP. If you change the order after having saved some forms, the order is not changed for the already saved forms.

- a. From the **Tools** drop-down menu, select **Options**. Then click the **IAP** tab.
 - b. Under **Resource Drop Down Lists**, click to select one of the following order options:
 - **Last Name, First Name** - Select this option to display the name in Last Name/First Name order.
 - **First Name Last Name** - Select this option to display the name in First Name/Last Name order
 - c. To save your changes, click the **Save** button. Then click the **OK** button to close the **Options** window.
3. To identify whether to show resources for **All Incidents** or a **Selected Incident**:
 - a. From the **Tools** drop-down menu, select **Options**. Then click the **IAP** tab.
 - b. Under **Resources To Display From**, click to select one of the following options:

- **Selected Incident** - Only shows resources for the incident selected in the **Incident** drop-down on the IAP window.
 - **All Incidents** - Shows resources for all incidents.
- c. To save your changes, click the **Save** button. Then click the **OK** button to close the **Options** window.
4. To change the size of the buttons in the **IAP** toolbar:
- a. From the **Tools** drop-down menu, select **Options**. Then click the **IAP** tab.
 - b. Under **Toolbar**, click to check the **Small Icons** checkbox. The size of the buttons in the IAP toolbar is reduced.
 - c. To change back to large buttons, click to uncheck the **Small Icons** checkbox.
 - d. To save your changes, click the **Save** button. Then click the **OK** button to close the **Options** window.
5. To identify the forms to display in the **Tree View** based on the **Archive** date:
- a. From the **Tools** drop-down menu, select **Options**. Then click the **IAP** tab.
 - b. Under **Tree View Display**, click to select one of the following options:
 - **Show All** - Shows all saved forms.
 - **By Date** - Shows all forms with a date that is newer than the one defined in the text box next to this option.

NOTE: When you select the **By Date** option, you must enter a date into the text box that is next to the option. This is the date to which the application refers in order to identify the forms to include in the Tree View.

- **Number of days prior to the system date and any new forms** - When you select this option, the application calculates the dates to display by subtracting the number of days defined from the Current System Date. The forms display from the calculated date forward.

NOTE: When you select the **Number of days prior to the system date and any new forms** option, you must enter a number into the text box that is next to the option. This is the number to which the application refers in order to identify the forms to include in the Tree View.

- c. To save your changes, click the **Save** button. Then click the **OK** button to close the **Options** window.

IV. ICS TEMPLATES

A. Set up and customize the ICS 203 template.

NOTE: Use this template to display additional kinds that are qualified to fill a position.

1. Open the **IAP** module.

2. From the **Tools** drop-down menu, select **Form 203 Template**.
3. If needed, you can change the names of the fields in the 203 form. To change the field name, highlight the text you want to change and type over it.
4. To customize the **KindCode** filter for each section:

- a. From each of the available drop-down lists, select the appropriate additional **KindCodes**.

OR

Click in the appropriate box, and then type the additional valid **KindCodes**. Separate the entries with a semi-colon.

NOTE: The Kindcodes you enter should be valid codes defined within the I-Suite database.

- b. To save your changes to the ICS 203 template, click the **Save** button in the **IAP** toolbar.

B. Set up and customize the ICS 204 template.

NOTE: Use this template to display additional kinds that are qualified to fill a position.

1. Open the **IAP** module.
2. From the **Tools** drop-down menu, select **Form 204 Template**.
3. If needed, you can change the names of the fields in the 204 form. To change the field name, highlight the text you want to change and type over it.
4. To customize the **KindCode** filters in the **Operations Personnel** section:

- a. From each of the available drop-down lists, select the appropriate additional **KindCodes**.

OR

Click in the appropriate box, and then type additional valid **KindCodes**. Separate your entries with a semi-colon.

NOTE: The Kindcodes you enter should be valid codes defined within the I-Suite database.

NOTE: Changes made to **Operations Personnel** are effective immediately.

- b. To save your additions to the ICS 204 template, click the **Save** button in the **IAP** toolbar.

5. Under **Resources Assigned this Period**, click one of the following buttons to identify the data and order in which information displays in the **Resource Designator** box on the ICS 204 form:

NOTE: You can choose to display one or all of the data items. You need to have a **Resource**

Name in order to save the template.

- a. Add Resource Name
- b. Add Kind Code
- c. Add Request Number
- d. Add Last Day to Work

6. To save your changes to the ICS 204 template, click the **Save** button in the **IAP** toolbar.

NOTE: Changes made to **Resources Assigned this Period** are applied when you create a new ICS 204 form. These changes will not affect already created or saved forms.

V. MASTER FREQUENCY LIST

A. Create a Master Frequency List (MFL).

NOTE: The Communications Unit Leader uses the MFL to create a database of frequencies to use on a specific incident.

1. Open the **IAP** module.
2. From the **Tools** drop-down menu, select **Master Frequency**.

OR

Click the **Master Frequency List** in the **Tree View** on the left side of the window.

NOTE: Add every frequency the Communications Unit Leader gives you that will be needed for the incident. This allows users to select the frequency from the drop-down list and avoid having to retype the frequency on each form.

NOTE: Only those frequencies with **Show** checked will be included in the **Frequency** drop-down list on the ICS 205 window.

3. Click to check the **Show** checkbox for the new **Frequency**.
4. From the **System** drop-down list, select the appropriate **System**.
5. Complete the remaining boxes.
 - a. Group
 - b. Channel
 - c. RFunction
 - d. RX
 - e. TX
 - f. Tone
 - g. Assignment

- h. Remarks.
6. Click the **Save** button to save the frequency.
7. When finished, click the **Propagate Changes** button.
8. On the **Propagate Changes** window, click **Yes** to propagate changes to all unlocked forms.

NOTE: The **Propagate Changes** button updates all created, unlocked, saved forms that use the frequency you updated. Locked, unsaved forms, or a form being edited will not be updated.

NOTE: To propagate changes to locked forms, you must first unlock each form to which you want frequency changes to be propagated.

B. Delete a frequency from the Master Frequency List (MFL).

NOTE: If you delete a frequency, you must manually re-enter that frequency to be able to see it in the **Frequency** drop-down list in the future.

1. Open the **IAP** module.
2. From the **Tools** drop-down menu, select **Master Frequency**.

OR

On the **IAP** window, click **Master Frequency List** in the **Tree View** on the left side of the window.

3. On the **Master Frequency List**, click in the selector column just to the left of the **Show** column to select the **Frequency** you want to delete.
4. Click the **Delete** button in the **Main** toolbar.

NOTE: This process only deletes the selected frequency, not the entire MFL.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	6.2 – IAP: Common Features of IAP Forms.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify common features of most IAP forms.2. Spell Check a Form.3. Format Text on a Form.4. Resize Areas on a Form.5. Mark a Form Final vs. Draft.6. Unlock a Finalized Form.7. Close a Form.

I. COMMON FEATURES

- A. Identify common features of most IAP forms.
- B. Spell Check a Form.
- C. Format Text on a Form.
- D. Resize Areas on a Form.
- E. Mark a Form Final vs. Draft.
- F. Unlock a Finalized Form.
- G. Close a Form

II. FORM FEATURES

A. To create a form:

1. Open the **IAP** module.

- a. In the **Tree View** on the left side of the window, double click the form you want to create.

OR

In the **IAP** toolbar, click the arrow next to the **Create New Form** button to display a drop-down list. Then click to select the form you want to create.

OR

From the **File** drop-down menu, select **New Form**, and then select the form you want to create.

NOTE: When you create a form, the following features are common to all forms:

- IAP automatically enters the **Incident Name**, **Date**, and **Time** on each form.
- The current date and time display in the **Date** and **Time Prepared** boxes.
- The current date and day display in the **Operational Period** box.
- If you are preparing a form for a date other than the current date, you can change the entry in the **Operational Period** box.
- You must save a form after editing it. IAP does not automatically save your forms. If you close a form without first saving it, IAP displays a prompt asking you to save the form.

NOTE: For the most part, you can change almost every entry in a form and select entries from drop-down lists.

2. To create a new form or open an existing form from the **Tree View**:
 - a. Double click the form name in the **Tree View** to create a new form.
 - b. Click an existing form once to open that form.
 - c. When the **Tree View** is sorted **By Plan**, right click the plan date. Then select the **Open All Forms** option from the menu that displays to open all of the forms in the plan.

3. To show multiple page numbers on a form:

- a. Use the scroll bar to scroll to the bottom of the new form.
- b. In the **Page ___ of ___ boxes**, type the page numbers you want to use.

EXAMPLE: Type Page **1** of **2** on the first page of the form. Then type Page **2** of **2** on the second page of the form.

- c. After creating the form, click the **Save** button to save it. If you have multiple forms open, click the **Save All** button to save changes to all of the open forms.

B. To spell check a form:

- a. In the **Tree View**, double click a form to open it.
- b. From the **Tools** drop-down menu, select **Spell Check**.

OR

Click the **Spell Check** button in the **IAP** toolbar.

- c. When finished, click the **Save** button to save any changes.

C. To format text selected on a form:

1. On the **Tree View**, click to open a form.
2. Click to highlight the text you want to format.
3. Click the appropriate text formatting button(s) in the **IAP** toolbar.

OR

From the **Edit** drop-down menu, select **Format**. From the sub-menu that displays, select **Font**. Use the options on the **Font** window to change any of the following. Click the **OK** button to apply the change:

- a. Font
- b. Font Style
- c. Font Size.

NOTE: You can also open the **Font** window by highlighting the text you want to format.

Then right clicking the mouse and selecting the **Font** option from the menu that displays.

NOTE: Change the font size to allow text to fit within a box on a form.

D. To globally change the font size on a form:

1. On the **Tree View**, click to open a form.
2. From the **Edit** drop-down menu, select the **Format** option. Then click **Font By Form** in the sub-menu that displays.

OR

Right click the mouse anywhere in the form. Select **Font By Form** from the menu that displays.

3. Under **Size**, click the size to apply to the text in the form.

NOTE: Although the other font options display in the **Font** window, only the **Size** is changed for the entire form. If you want to change the **Font** or **Font Style**, follow the directions under *C. To format text selected on a form.*

4. Click the **OK** button to change the font size in the form.

E. To resize areas on a form:

NOTE: Use the **Up** and **Down Arrows** that display on the right-hand side of larger sized text boxes to adjust the size of text boxes, as needed.

1. To resize a text box, click the **Up Arrow** (↑) or the **Down Arrow** (↓) next to the text box you want to adjust.

F. To mark a form Final vs. Draft:

NOTE: When you create a form, it is automatically marked as **Draft**. This mark displays at the top and bottom of each page, until you Finalize the form.

1. In the **Tree View**, click a form to open it.
2. In the **IAP** toolbar, click the **Mark Final** button.

OR

From the **Tools** drop-down list, select **Mark Final**.

NOTE: Once you mark a form as **Final**, it is locked. You must first unlock the form by changing it back to **Draft**, before you can edit it.

G. Unlock a Finalized Form.

1. In the **Tree View**, click a form to open it.
2. In the **IAP** toolbar, click the **Mark Draft** button.

OR

From the **Tools** drop-down menu, select **Mark Draft**.

H. To Close a form, use one of the following methods:

1. From the **File** drop-down menu, select the **Close Form** option.
2. Right click an open form and select the **Close** option from the menu that displays.
3. Click the **Close** button (**X**) that displays in the upper right corner of the window.
4. From the **Windows** drop-down menu, select the **Close All Forms** option.
5. Right click a plan listed in the **Tree View**. Select the **Close All Forms** option from the menu that displays.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	6.3 – IAP: Create an ICS 202 – Incident Objectives.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Create an ICS 202 – Incident Objectives.

I. ICS 202

A. Create an ICS 202 – Incident Objectives.

II. CREATE ICS 202

A. To create an ICS 202 – Incident Objectives:

1. Double click **ICS202** in the **Tree View** to open a new **ICS 202** form.
2. From the **Operational Period** drop-down list, select the appropriate **Shift**.
3. Complete the following information:
 - a. General Control Objectives for the incident (include alternatives)
 - b. Weather Forecast for Period
 - c. General Safety Message
4. Under **Attachments**, click to select all that apply:
 - a. Organization List – ICS 203
 - b. Division Assignment Lists – ICS 204
 - c. Communications Plan – ICS 205
 - d. Medical Plan – ICS 206
 - e. Air Operations Summary – ICS 220
 - f. Incident Map
 - g. Safety Message
 - h. Traffic Plan
5. To add an additional attachment, click to check the checkbox next to a blank line.
Then type the name of the attachment next to that checkbox.
6. In the **Prepared by (Planning Section Chief)** box, type the **Planning Section Chief Name**.
7. In the **Approved by (Incident Commander)** box, type the **Incident Commander Name**.
8. When finished, click the **Save** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	6.4 – IAP: Create an ICS 203 – Organization Assignment List.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Create an ICS 203 – Organization Assignment List.

I. ICS 203

A. Create an ICS 203 – Organization Assignment List.

II. CREATE ICS 203

A. To create an ICS 203 – Organization Assignment List:

NOTE: The ICS 203 identifies which positions are filled and the people who filled them.

NOTE: People who are qualified for each position KindCode are identified in the I-Suite Database. If a name does not display in the drop-down list, check the KindCode for that person to see what Kindcode was entered in their record, or you can manually type in the name.

NOTE: Keep in mind that some position boxes display more than one position KindCode.

1. Double click **ICS203** in the **Tree View** to open a new **ICS 203** form.
2. For each position, select the **Person** for that position from the available drop-down lists.

NOTE: You can enter more than one person in a position box.

NOTE: Additional names may not display completely on the window and will not print correctly. To help additional names to display correctly, you can reduce the font size.

NOTE: Most labels and headings can be customized, as needed.

4. Under **Agency Representative**, type the **Agency** for each agency representative.
5. In the **Prepared by (Resource Unit Leader)** box, type the **Resource Unit Leader Name**, and then click the **Save** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	6.5 – IAP: Create an ICS 205 – Incident Radio Communications Plan.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Create an ICS 205 – Incident Radio Communications Plan.

I. ICS 205

A. Create an ICS 205 – Incident Radio Communications Plan.

NOTE: In order to use the **Frequency-Rx** drop-down list on the **ICS 204**, you must complete an **ICS 205** form for that shift. If you have not completed an ICS 205 form, a message displays to remind you to create the ICS 205 when you click the **Frequency-Rx** drop-down list on the **ICS 204** form.

II. CREATE ICS 205

A. To create an ICS 205 – Incident Radio Communications Plan:

NOTE: The Communications Leader completes the ICS 205 – Incident Radio Communications Plan.

NOTE: The ICS 205 uses frequencies defined in the Master Frequency List (MFL).

1. Double click **ICS205** in the **Tree View** to open a new **ICS 205** form.

2. From the **Radio Type/Cache** drop-down lists select each **Frequency**.

NOTE: When you select a frequency, I-Suite automatically inserts the remaining data from the MFL into the form.

NOTE: All frequencies in the **ICS 204 Frequency – RX** drop-down list are from the approved ICS 205 for that operational period.

3. Click the **Verify Frequencies** button.

NOTE: The **Verify Frequencies** button verifies the following frequency assignments:

- All frequencies on the ICS 204 and ICS 205 are approved frequencies on the MFL.
- All frequencies for that operational shift are assigned to at least one of the ICS 204s for that operational period.
- Any frequency on an ICS 204 is also on the approved ICS 205 for that operational period.

NOTE: If there are any discrepancies between the ICS 204, ICS 205 and the MFL, IAP displays a Notification message.

4. Complete the rest of the form, as applicable.

5. When finished, click the **Save** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	6.6 – IAP: Create an ICS 204 – Division Assignment List.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Create an ICS 204 – Division Assignment List.2. Cut, Copy, Paste, Insert, Move, and Delete Rows on an ICS 204 Form.

I. ICS 204

- A. Create an ICS 204 – Division Assignment List.
- B. Cut, Copy, Paste, Insert, Move, and Delete Rows on an ICS 204 Form.

II. CREATE ICS 204

A. To create an ICS 204 – Division Assignment List:

1. Double click **ICS204** in the **Tree View** to open a new **ICS 204** form.
2. In the **Branch** box, type the **Branch Name**.
3. In the **Division/Group** box, type the **Division/Group** name.
4. From the **Operational Period** drop-down list, select the appropriate **Shift**.
5. Under **Operations Personnel**, select the person for each **Position** from the available drop-down lists.
6. Under **Resources Assigned this Period**, click to select one of the following options:
 - a. **All** – to display all resources in the drop-down list.
 - b. **Crew** – to limit the drop-down list to display only hand crews.
 - c. **Engine** – to limit the drop-down list to display only engines.
 - d. **Equipment** – to limit the drop-down list to display dozers, water tenders, tractor plows, and other heavy equipment.
 - e. **Line Overhead** – to limit the drop-down list to display individual line overhead such as **Strike Team Leaders** and **Field Observers**.
7. Under **Strike Team / Task Force / Resource Designator**, select the appropriate **Resources** from the available drop-down lists.

NOTE: If you use the drop-down list to select the Resource, I-Suite automatically defines the leader and the number of persons from the database.

8. Complete the following boxes for each resource, as appropriate:
 - a. Leader
 - b. Number of Persons
 - c. Trans Y/N
 - e. Drop Off PT./Time
 - f. Pick Up PT./Time.

NOTE: You can complete the **Drop Off** and **Pick Up Locations** and **Times** for the first resource and then click the **Auto-Fill** buttons to fill-in the same information for the remaining locations and times for all other resources.

NOTE: You can edit the **Drop Off** and **Pick Up Locations** and **Times**, as needed.

9. Complete the following boxes, as appropriate:

- a. Control Operations
- b. Special Instructions.

NOTE: The **Division/Group Communications Summary** section allows you to import frequencies from the **ICS 205 – Radio Communications Plan**. If the **Frequency-Rx** drop-down list does not contain any frequencies, a warning message displays noting that an ICS 205 was not yet created for that operational period. You can also manually enter frequencies.

NOTE: To display frequencies added to the **ICS 205** since the last time you started IAP, click the **Refresh** button.

10. Under **Division/Group Communications Summary**, select the appropriate **Frequency – RX** from the available drop-down lists for each **Function**.

NOTE: The **Division/Group Communications Summary** section is automatically filled with frequencies from the **ICS 205 – Radio Communications Plan**.

OR

Enter the data to complete the following boxes for each **Function**, as appropriate.

- a. Frequency - RX
- b. Frequency - TX
- c. Tone
- d. System
- e. Channel
- f. System
- g. Channel.

11. In the **Prepared By (Resource Unit Leader)** box, type the **Resource Unit Leader Name**.

12. In the **Approved By (Planning Section Chief)** box, type the **Planning Section Chief Name**, and then click the **Save** button.

III. MOVING/COPYING/DELETING ROWS

A. To Cut, Copy, Paste, Insert, Move, and Delete Rows on an ICS 204 Form:

1. In the **Tree View**, click a **204 Form** to open it.
2. To **Cut** a row, click the **Select/Unselect** button that displays on the far left side of the row. From the menu that displays, select **Cut Row**.
3. To **Copy** a row, highlight the information in the row you want to copy. Then right click the row. From the menu that displays, select **Copy**.

4. To **Paste** a cut or copied row, click the **Select/Unselect** button that displays on the far left side of the row. From the menu that displays, select **Paste Row**.
5. To **Insert a blank row**, click the **Select/Unselect** button that displays on the far left side of the row. From the menu that displays, select **Insert Row**.
6. To **Move a row**, click the **Select/Unselect** button that displays on the far left side of the row. From the menu that displays, select **Move Row Up** or **Move Row Down** to move the row up or down.
7. To **Delete a row**, click the **Select/Unselect** button that displays on the far left side of the row. From the menu that displays, select **Delete Row**.
8. When finished, click the **Save** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	6.7 – IAP: Create an ICS 206 – Medical Plan.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Create an ICS 206 – Medical Plan.

I. ICS 206

A. Create an ICS 206 – Medical Plan.

II. CREATE ICS 206

A. To create an ICS 206 – Medical Plan:

NOTE: The ICS 206 – Medical Plan is a narrative, fill-in form.

1. Double click **ICS206** in the **Tree View** to open a new **ICS 206** form.
2. From the **Operational Period** drop-down list, select the appropriate **Shift**.
3. Complete the following sections, as appropriate:
 - a. Incident Medical Aid Station
 - b. Ambulance Services
 - c. Incident Ambulances.
3. In the **Paramedics** column, click to check the **Yes** or **No** checkboxes to designate the available **Paramedics** for each type of medical service.
4. Complete the **Hospitals** section. Then click to select the **Yes** or **No** checkboxes, to identify whether a **Helipad** or **Burn Center** are available.
5. In the **Medical Emergency Procedures** box, type a description of the medical emergency procedures, as appropriate.
6. In the **Prepared By (Medical Unit Leader)** box, type the **Medical Unit Leader Name**.
7. In the **Reviewed By (Safety Officer)** box, type the **Safety Office Name**, and then click the **Save** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	6.8 – IAP: Create an ICS 220 – Air Operations Summary.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Create an ICS 220 – Air Operations Summary.

I. ICS 220

A. Create an ICS 220 – Air Operations Summary.

II. CREATE ICS 220

A. To create an ICS 220 – Air Operations Summary:

NOTE: The **ICS 220 – Air Operations Summary** is mostly a narrative, two-page form.

1. Double click **ICS220** in the **Tree View** to open a new ICS 220 form.
2. From the **Operational Period** drop-down list, select the appropriate **Shift**.
3. Complete the following sections, as appropriate:

NOTE: When the header information (i.e. Prepared By, Sunrise, Sunset, etc.) is completed for Page 1, the same information is automatically transferred to Page 2.

- a. Prepared by – (Enter the Air Operations Leader Name.)
- b. Sunrise
- c. Sunset
- d. REMARKS
- e. MEDEVAC AIRCRAFT
- f. TFR
- g. PERSONNEL
- h. FREQUENCY – (Use the AM RX/TX drop down box to select the frequency of your choice.)

NOTE: Frequencies are automatically populated with frequencies from the ICS 205.

- i. FIXED WING
 - j. HELICOPTERS.
4. To advance to the next page of the form, click the **Go to Page 2** button.
 5. Complete the **TASK/ MISSION/ ASSIGNMENT** section, as appropriate.
 6. When finished, click the **Save** button.

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 6.9 – IAP: View, Copy, and Delete Forms.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. View a Single Type of Form (e.g. all 202's).
 2. View All Forms Grouped by Form Number.
 3. View All Forms Grouped by Incident Action Plan.
 4. Copy a form.
 5. Copy a Plan
 6. Delete a form.

I. VIEW/COPY/DELETE FORMS

- A. View a Single Type of Form.
- B. View All Forms Grouped by Form Number.
- C. View All Forms Grouped by Incident Action Plan.
- D. Copy a form.
- E. Copy a plan.
- F. Delete a form.

II. VIEW FORMS

NOTE: The **Tree View** lists forms in numerical form order, by single type of form or for all operational periods (Plan).

NOTE: There are three ways to display the **Tree View**.

A. To view a Single Type of form:

1. From the **View** drop-down menu, select **Individual Form**. Then click to select the form you want to view.

OR

In the **IAP** toolbar, click the arrow next to the **Manage By Form** button. Then select the form you want to view from the list that displays.

B. To view All Forms Grouped by Form Number:

1. From the **View** drop-down menu, select **Form**.

OR

In the **IAP** toolbar, click the **Manage By Form** button.

NOTE: Forms do not display in the **Tree View** until saved.

C. To view All Forms Grouped by Incident Action Plan:

NOTE: The **Tree View** of the plans displays the forms that were created and saved for each operational period.

1. From the **View** drop-down menu, select **Plan**.

OR

On the **IAP** toolbar, click the **Manage By Plan** button.

NOTE: You can open more than one form at a time. You can switch between open forms by

selecting the form from the **Window** drop-down menu. If the forms are minimized, you can also click an open form to select it.

III. COPY FORMS

A. Copy a Form.

NOTE: To add a second page to a form, you can use the **Copy Form** option. This option copies the first page of the form to a second page. Edit the second page, as needed, keeping the same date and shift as the first page. Enter **Page 2 Of 2** at the bottom of the second page.

1. To copy any form:
 - a. In the **Tree View**, click to highlight the form you want to copy.
 - b. Click the **Copy Form** button to open the **Copy Form** window.

OR

From the **Tools** drop-down menu, select the **Copy Form** option to open the **Copy Form** window.

- c. The form you selected in the **Tree View** is highlighted under **Select a Form to Copy From**. If you want to copy another form, click to select the **Form** you want to copy.
- d. Under **Select an Operational Period**, select the **Date** and **Shift** to use for the Operational Period on the form that is copied.

NOTE: The **Operational Period** defaults to the next day. You can change this date by either typing the date or selecting it from the drop-down calendar.

- d. Click the **OK** button to copy the form.

IV. COPY PLANS

A. Copy a Plan.

NOTE: To copy an entire **Incident Action Plan**, use the **Copy Plan** option. After you copy the plan, edit the forms in the plan, as needed.

1. To copy any plan:
 - a. Click the **Manage by Plan** button to sort the **Tree View** by Plan.
 - b. Click the **Copy Plan** button to open the **Copy Plan** window.

OR

Select the **Tools Menu** and the **Copy Plan** option to open the **Copy Plan** window.

- c. Under **Select a Plan to Copy From**, click the plan you want to copy.
- d. Under **Select an Operational Period**, select the **Date** and **Shift** to use for

the Operational Period on the plan that is copied.

NOTE: The **Operational Period** defaults to the next day. You can change this date by either typing the date or selecting it from the drop-down calendar. The **Operational Period** that you define is copied onto each of the forms in the plan.

- e. Click the **OK** button to make a copy of the plan.
- f. From the **Window** drop-down menu, select a form to edit.

NOTE: All of the forms in the plan you copied are listed under the **Window** drop-down menu.

- g. Make the appropriate changes to the form.
- h. Click the **Save** button to save your changes to the form. Notice that a new plan is created for today with the form listed underneath it in the Tree View.

NOTE: You need to save the form even if you do not make any changes to it. Only those forms that are saved will be included in the plan.

- i. Repeat steps f - h for each form in the plan.

V. DELETE FORMS

A. To delete a form:

1. In the **Tree View**, click to select the form you want to delete.
2. Click the **Delete** button in the **Main** toolbar.
3. On the **Deleting a Form** window, click **Yes** to delete the selected form.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	6.10 – IAP: Work with Output.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Print an IAP Form.2. Export an IAP Form to a PDF file.3. Print an IAP Plan.4. Export an IAP Plan to a PDF file.

I. WORKING WITH OUTPUT

NOTE: This Unit identifies how to create the following types of output from IAP:

- A. Print an IAP Form.
- B. Export an IAP Form to a PDF file.
- C. Print an IAP Plan
- D. Export an IAP Plan to a PDF file.

NOTE: This Unit identifies some of the key tasks you must perform to create output from IAP.

II. PRINTING FORMS

A. Print IAP Forms:

1. To Preview and Print a form.

- a. On the **Tree View**, click to select the form you want to print.
- b. In the toolbar, click the **Print Preview** button.

OR

From the **File** drop-down menu, select **Print Preview**.

- c. On the **Print Preview** window, click the **Print** button. When the **Print** window displays, click the **Print** button.

2. To Print a form without Previewing it:

- a. In the **Tree View**, click to select the form you want to print.
- b. In the toolbar, click the **Print** button.

OR

From the **File** drop-down menu, select **Print Current Form**.

- c. When the **Print** window displays, click the **Print** button.

III. EXPORTING FORMS

A. To export an IAP Form to a PDF file:

NOTE: You can export and save a form to a PDF file, which you can then post on a Web site.

- 1. In the **Tree View**, click to select the form you want to export.
- 2. From the **File** drop-down menu, select **Export**.
- 3. On the **PDF Export** window, browse to the folder where you want to save the PDF file.

4. In the **File Name** text box, type the name you want to assign to the PDF file. Then click the **Save** button.

IV. PRINTING PLANS

A. Print Incident Action Plans:

1. To Preview and Print a Plan:

- a. Click the **Manage by Plan** button to sort the **Tree View** by Plan.
- b. Click the **Plan** you want to preview in the **Tree View**.
- c. From the **File** drop-down menu, select the **Print Preview Plan** option.
- d. On the **Print Preview** window, click the **Print** button.
- e. When the **Print** window displays, click the **Print** button.

2. To Print a plan without Previewing it:

- a. Click the **Manage by Plan** button to sort the information in the **Tree View** by Plan.
- b. Click the **Plan** you want to print in the **Tree View**.
- c. From the **File** drop-down menu, select the **Print Plan** option.
- d. When the **Print** window displays, click the **Print** button.

V. EXPORTING PLANS

A. To Export an Incident Action Plan to a single PDF file:

1. Click the **Manage by Plan** button to sort the **Tree View** by Plan.
2. Click the **Plan** you want to export in the **Tree View**.
3. From the File drop-down menu, select the **Export Plan** option.
4. On the **Plan Export Options** window, select **Export Entire Plan** option.
5. On the **PDF Export** window, browse to the folder where you want to save the PDF file.
6. In the **File Name** text box, type the name you want to assign to the PDF file. Then click the **Save** button.

B. To Export an Incident Action Plan to multiple PDF files (one file for each form in the plan):

1. Click the **Manage by Plan** button to sort the **Tree View** by Plan.
2. Click the **Plan** you want to export in the **Tree View**.
3. From the File drop-down menu, select the **Export Plan** option.
4. On **Plan Export Options** window, select **Export Entire Plan to Separate Files** option and click the **OK** button.
5. On the **PDF Export** window, browse to the folder where you want to save the

PDF file.

6. In the **File Name** text box, type the name you want to assign to the PDF file. Then click the **Save** button.

NOTE: The system will automatically append the name of each form in the plan to the end of the filename entered by the user.



UNIT 7

I-Suite Time

7/12/2013

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 2. Add/edit common data.
 3. Add/edit contractors, agreements, and administrative offices for payment.
 4. Add/edit resource specifications.
 5. Add/edit rates.
 6. Add/edit operator(s) for a contracted resource.
- 7.7 – Time: Posting Contract Resource Time.
1. Identify primary and special rate options.
 2. Post for each unit of measure.
 3. Identify when to use the ½ rate and the guarantee functions.
 4. Post contracted resource time.
 5. Repost a day of time.
 6. Delete a row of time.
 7. Preview/print an OF 286 report.
- 7.9 – Time: Time Reports.
1. Run and print standard Time reports.
 2. Print/Fax a Personnel Time Report.
- 7.10 – Time: Advanced Contracting (Optional).
1. Add complex contract information.
 2. Post time for contracted resources with complex contracts.

STUDENT MANUAL

COURSE:

I-Suite

UNIT:

7.0 – Time: Overview.

OBJECTIVES:

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

1. Identify the Purpose of the Time module.
2. Identify Options on the Time window.

I. TIME

A. Review the Time module.

NOTE: The Time module shares data with other I-Suite modules.

1. The primary purpose of **Time** is to track time and create pay documents, including the Emergency FireFighter Time Report (OF-288) and the Emergency Equipment Use Invoice (OF-286).

NOTE: Make sure you are careful when working with private information such as Social Security Numbers (SSN) and IRS Federal Employer Tax ID Numbers (EIN). This information must be kept confidential.

II. TIME WINDOW

A. Review the Time window:

1. The **Time** toolbar is located to the right of the Filter toolbar. The buttons in this toolbar include:
 - a. **Post Time** - Click the **Post Time** button to post time for a resource.
 - b. **Adjustments** - Click the **Adjustments** button to make adjustments to the time for items such as Quarters and Lodging, Meals, Travel, etc.
 - c. **Treat enter as Tab** - If you would like the **Enter** key to work as the **Tab** key when moving between options, click to check the **Treat enter as Tab** checkbox.
 - d. **Print Invoice** - Click the **Print Invoice** button to print either an OF 288 or an OF 286, depending on the resource you have selected.
2. The **Resources** grid displays beneath the toolbars in the center part of the window. This grid contains a list of all resources currently defined in the system.
3. When you click the **Post Time** button, a Posting area displays at the bottom of the window. This area contains the following three tabs:
 - a. **Personnel Post** - Use this tab to post time for personnel resources.
 - b. **Crew Post** - Use this tab to post time for crew resources.
 - c. **Contractor Post** - Use this tab to post time for a contracted resource.
4. The **Time** drop-down menu at the top of the window contains the following **Time** options:
 - a. **Admin Office For Payment** - Select this option to add Admin Offices to the I-Suite system.
 - b. **Contractor** - Select this option to add contractors and agreements to the I-Suite system.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	7.1 – Time: Options.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Select grid columns and set order.2. Set the Enter key as Tab for Posting.

I. OPTIONS

- A. Select grid columns and set order.
- B. Set the **Enter** key as **Tab** for Posting.

II. RESOURCES GRID

- A. To identify the columns to display in the grid and the order in which to display them:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
2. Click the **Time** tab.
3. Under **Resource Grid Columns**, click each of the columns you want to select.
4. If you want to display the selected columns on the **Time** window, click the **Show** button. If you want to remove the selected columns from the **Time** window, click the **Hide** button.
5. To adjust the order in which the columns display on the **Time** window, click a column. Then click the **Move Up** or **Move Down** button to move the column.
6. When finished, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

- B. To set the **Enter** key as **Tab** for Posting Time:

1. Click to check the **Treat enter as Tab** checkbox in the **Time** toolbar.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	7.2 – Time: Entering and Editing Personnel Information.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the importance of data entry guidelines.2. Identify common data.3. Manage all incidents as one.4. Manage incidents separately.5. Enter and edit personnel data.

I. PERSONNEL INFORMATION

- A. Identify the importance of data entry guidelines.
- B. Identify common data.
- C. Manage all incidents as one.
- D. Manage incidents separately.
- E. Enter and edit personnel data.

II. DATA ENTRY GUIDELINES

- A. Review and discuss the importance of data entry guidelines.

1. In **Resources**, data is organized and presented based on the **ICS 211** form.
2. Before saving a resource you must complete the required fields. These required fields include:
 - a. Request Number.
 - b. Account Code.
 - c. Last Name, First Name.
 - d. Kind/Position.
 - e. Status.
 - f. Configuration.

NOTE: Required fields are identified with an asterisk (*) to the left of the label.

3. Before rostering people or adding additional qualifications, you must complete the required fields and save the resource.

III. COMMON DATA

- A. To review common data:

1. From the **Modules** drop-down list, select **Time**.

OR

Click the **Time** button in the **Main** toolbar.

2. In the **Resources** grid, click to select the resource you want to view.
3. Click the **Edit** button in the toolbar.

NOTE: Entry items located above the tabs (i.e. just below the **Manage Resource – Edit Mode** label) are common to all I-Suite modules.

NOTE: Data entry items for specific modules are located on their respective tabs (i.e. **Plans, Time - Individual, and Cost** Tabs).

NOTE: Resources is the primary data entry point for I-Suite data. The quality of the initial data is critical to successful integration of the data into other I-Suite modules.

NOTE: Understanding the concept of **Data Sharing** is critical. Data is shared between all I-Suite modules. Changes, additions, or deletions from any functional area affects the other I-Suite modules. Successful integration requires cooperation and established **Data Ownership Rules**. These rules are established by each Incident Management Team and may change from team to team.

IV. MANAGE INCIDENTS

A. To manage all incidents as one:

1. On the **Menu** bar, click to check the **Manage All Incidents As One** checkbox.
2. When the **Manage All Incidents as One** message displays, click the **OK** button.

NOTE: When managing all incidents as one, all resources display in the **Resources** grid.

B. To manage incidents separately:

1. On the **Menu** bar, click to uncheck the **Manage All Incidents As One** checkbox.
2. From the **Incident** drop-down list, select the Incident you want to manage.

NOTE: When managing incidents separately, only resources from the selected incident display in the **Resources** grid.

V. PERSONNEL DATA

A. To add or edit personnel data for Time:

NOTE: Personnel data is initially defined in Resources. Before you can Post Time, you must edit the Resource records and add Time data.

1. Open the **Time** module.
2. In the **Resources** grid, click the personnel resource to which you want to add time data.
3. Click the **Edit** button in the toolbar.
4. Click the **Time - Individual** tab at the bottom of the window.
5. From the **Employment Type** drop-down list, select one of the following employment types to assign to the personnel resource:
 - a. AD
 - b. FED
 - c. OTHER
6. If the **Employment Type** is **AD**, enter the resource's social security number in the **Social Security Number** and **Verify SSN** boxes.

NOTE: To protect the identity of the Resource, the Social Security Number will display as

asterisks when you type it in the **Social Security Number** box. You must type it a second time in the **Verify SSN** box to ensure that the number is correct. If the two numbers do not match, the system will require you to enter them again.

NOTE: Resources with an **AD Employment Type** must have a **Social Security Number** defined or an **Original OF 288** will not print for them.

8. Enter any applicable **288 Remarks**.

9. If **AD** is selected as the **Employment Type**, complete the following information:

- a. If this is the **Initial Employment** for the personnel resource, click to check the **Initial Employment** checkbox.
- b. If there will be **Return Travel**, click to check the **Return Travel** checkbox.
- c. From the **Point of Hire** drop-down list, select the appropriate point of hire.
- d. From the **Area** drop-down list, select the appropriate area.
- e. From the **Class** drop-down list, select the class to assign to the individual resource.

9. If **Other** is selected as the **Employment Type**, enter the appropriate **Current Rate**.

10. If **FED** is selected, this is the only required information needed.

11. Under **Personnel Mailing Address**, complete the following information:

NOTE: This information can be entered at a later time.

- a. Address 1
- b. Address 2
- c. City
- d. State
- e. Zip
- f. Phone
- g. Fax.

NOTE: If a Fax number for FED or OTHER is entered at this time, it is available for the Personnel Time Report (Print/Fax).

12. To save your changes, click the **Save** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	7.3 – Time: Posting Personnel Time.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Post time for personnel.2. Use special rates.3. Repost a day of time.4. Edit a day of posted time.5. Delete a day of posted time.6. Change the KindCode and Rate (one-time change).7. Change the KindCode and Rate (permanent change).8. Lock posted time to an established employment code.9. Post return travel time.10. Preview/print an OF 288 report.

I. PERSONNEL TIME

- A. Post time for personnel.
- B. Use special rates.
- C. Repost a day of time.
- D. Edit a day of posted time.
- E. Delete a day of posted time.
- F. Change the KindCode and Rate (one-time change).
- G. Change the KindCode and Rate (permanent change)
- H. Lock posted time to an established employment code.
- I. Post return travel time.
- J. Preview/print an Emergency FireFighter Time Report (OF 288) report.

II. POST PERSONNEL TIME

NOTE: The **Date** automatically changes when posting Time that extends beyond midnight. If you post Overlapping Hours, you must verify the overlap before proceeding.

NOTE: For this first exercise, you will use Crew Time Reports (CTR's) to post time.

- A. To use CTR's to post personnel time:
 - 1. Open the **Time** module.
 - 2. Click the **Post Time** button in the **Time** toolbar.
 - 3. In the **Resources** grid, click the personnel resource to which you want to post time.
 - 4. On the **Personnel Post** tab, select the appropriate **Account Code** from the **Account Code** drop-down list.

NOTE: The codes that display in the **Accounting Codes** drop-down list are based on whether **Manage All as One** is selected. If **Manage All as One** is selected, all accounting codes display in the list. If a single incident is selected, only accounting codes for that incident display in the list.

- 5. In the **Date** box, type the **Date** in the format MMDDYYYY.
- 6. If a special circumstance applies (e.g. Environmental Pay, Travel, Day Off, etc.), select the appropriate code from the **Special** drop-down list.

NOTE: If you assign the **GUAR**, **COP**, or **DAY OFF** special codes to a resource with an **Employment Type** of **FED** or **OTHER**, the **Start Time** and **Stop Time** boxes are disabled. You do not need to define a Start or Stop time when these special codes are assigned.

NOTE: If you assign the **GUAR**, **COP**, or **DAY OFF** special codes to a resources with an **Employment Type** of **AD**, the **Start Time** and **Stop Time** boxes are disabled and an **Hours**

box displays. Enter the number of hours for the **AD** resource in this box. The maximum number of hours you can enter is eight.

7. In the **Start Time** box, either type the time or select it from the drop-down list to identify when the individual started working.

8. In the **Stop Time** box, either type the time or select it from the drop-down list to identify when the individual stopped working.

9. To commit the posting, click the **Save** button.

10. To close the **Personnel Post** window, click the **Close** button.

NOTE: If the time your are posting includes time from before midnight and time after midnight, a **Posting Spans Midnight** message displays. If you click the **Yes** button, the posting is split into two entries. If you click **No**, the posting is canceled.

NOTE: Posted time is locked to an established employment code.

B. Posting special rates.

1. Select a code from the **Special** drop-down list when any of the following special circumstances apply:

- a. Hazards Fuels (Casual)
- b. Instructor (Casuals)
- c. Training (Casuals)
- d. Continuation of Pay
- e. Day Off
- f. Environmental Pay 100%
- g. Environmental Pay 15 %
- h. Environmental Pay 25 %
- i. Environmental Pay 4%
- j. Environmental Pay 8 %
- k. Guarantee
- l. Travel
- m. Hazard Pay

III. REPOST HOURS

A. To repost different hours for an individual whose time was already posted for the day:

1. Open the **Time** module.

2. Click the **Post Time** button in the **Time** toolbar.

3. In the **Resources** grid, click the resource for which you are reposting hours.
4. On the **Personnel Post** tab, select the appropriate **Account Code** from the **Account Code** drop-down list.

NOTE: If you select an **Account Code** that is not the default for that resource, the code remains selected until a different resource or different account code is selected.

5. In the **Date** box, type the **Date** in the format MMDDYYYY.
6. If a special circumstance applies (e.g. Environmental Pay, Travel, Day Off, etc.), select the appropriate code from the **Special** drop-down list.
7. In the **Start Time** box, either type the time or select it from the drop-down list to identify when the individual started working.
8. In the **Stop Time** box, either type the time or select it from the drop-down list to identify when the individual stopped working.
9. Click the **Save** button to post the time.
10. When the **Overlapping Hours** window displays, click the **Yes** button to overwrite the previously posted hours with the ones that you just defined.
11. To close the **Personnel Post** window, click the **Close** button.

IV. EDIT POSTED TIME

A. To edit a day of posted time.

1. Open the **Time** module.
2. Click the **Post Time** button in the **Time** toolbar.
3. In the **Resources** grid, click the resource with the posted time you want to edit.
4. In the **Personnel Post Detail** grid, click the posted time you want to edit. You can edit the entries in the following boxes:
 - a. Start
 - b. Stop
 - c. Class
 - d. KindCode
 - e. Special
 - f. AccountingCode

NOTE: If the special code **GUAR**, **COP**, or **DAY OFF** were assigned to the posting, you cannot edit the entry. To make changes to one of these postings, you must delete the entry and then create a new posting.

5. After you have edited the entries, click the **Close** button to close the **Personnel Post** window.

NOTE: For edited entries to save, you must click outside of the grid. When the pencil image

in the selector column changes from a pencil to an arrow, the changes were saved.

B. To delete a day of posted time:

1. Open the **Time** module.
2. Click the **Post Time** button in the **Time** toolbar.
3. In the **Resources** grid, click the resource with the posted time you want to delete.
4. In the **Personnel Post Detail** grid, click anywhere in the row that you want to delete. Then click the **Delete** button in the **Main** toolbar.
5. When the **Delete Posting** window displays, click the **Yes** button to remove the posted time.

C. To change the KindCode or Rate (one-time change only).

1. Open the **Time** module.
2. Click the **Post Time** button in the **Time** toolbar.
3. In the **Resources** grid, click the resource you want to edit.
4. In the **Personnel Post Detail** grid, locate the row containing the **KindCode** or **Rate** you want to change.
5. To change the **KindCode**, select the new code from the **KindCode** drop-down list.
6. To change the **AD Class** and **Rate**, enter the class code in the **AD Class** box in the grid.
7. To change the **Other Rate**, click in the **Current Rate** box. Then enter the appropriate **Rate**.
8. To close the **Personnel Post** window, click the **Close** button.

NOTE: The **KindCode** or **Rate** for all future personnel postings can be changed in Resources.

V. RETURN TRAVEL TIME

A. To post return travel time with 0 (zero) hours:

1. Open the **Time** module
2. Click the **Post Time** button in the **Time** toolbar.
3. In the **Resources** grid, click the resource to which you are posting return travel time.
4. Click to check the **Post Return Travel Start Time Only** checkbox.

NOTE: The **TVL** code is automatically selected in the **Special** box when the **Post Return Travel Start Time Only** checkbox is checked.

5. In the **Date** box, type the **Date** in the format MMDDYYYY.
6. In the **Start Time** box, either type the time or select it from the drop-down list to

identify the time when the individual started the return travel.

NOTE: No **Stop Time** is defined. If you do enter a **Stop Time**, the **Time** module removes it when you save the posting entry.

7. To commit the posting, click the **Save** button.

NOTE: Notice that the number of hours in the grid is 0 (zero) for the posting.

8. To close the **Personnel Post** window, click the **Close** button.

B. To post Return Travel Time with hours defined:

1. Open the **Time** module.

2. Click the **Post Time** button in the **Time** toolbar.

3. In the **Resources** grid, click the resource to which you are posting return travel time.

4. In the **Date** box, type the date in the format MMDDYYYY.

5. Select the **TVL** option from the **Special** drop-down list.

NOTE: Make sure the **Post Return Travel Start Time Only** checkbox is NOT checked.

6. In the **Start Time** box, either type the time or select it from the drop-down list to identify the time when the individual started the return travel.

7. In the **Stop Time** box, either type the time or select it from the drop-down list to identify the time when the individual stopped the return travel.

8. To commit the posting, click the **Save** button.

NOTE: Notice that the number of hours displays in the grid for the posting. This number based on the **Start** and **Stop Times** that were defined.

9. To close the **Personnel Post** window, click the **Close** button.

VI. PRINT INVOICE

A. To preview or print an Emergency FireFighter Time Report (OF 288) report:

1. Open the **Time** module.

2. In the **Resources** grid, click the resource for which you are creating the report.

3. Click the **Print Invoice** button.

4. On the **OF 288** window, identify the following information:

a. From the **Last Date Included on Invoice** drop-down list, select the appropriate date.

b. To create the final **OF 288** for a resource leaving the incident, click to check the **Final Invoice** checkbox.

c. Click to select one of the following **Print Options**:

- **Preview/Print DRAFT Invoice** - Generates a Draft Invoice. Review

this invoice, before printing an Original copy. The word Draft prints on this invoice.

- **Preview/Print ORIGINAL Invoice** - Generates an Original Invoice and locks all postings included in the invoice. When a posting is locked, you cannot make any changes to it.

NOTE: If a resource has a supply item that is not consumable issued to them and an Original Invoice is printed, a notification message displays indicating that the resource has supplies issued to them. Click the **OK** button to continue printing the invoice. Click the **Cancel** button to abort the print process.

- **Preview/Print DUPLICATE ORIGINAL Invoice(s)** - Generates a copy of an Original Invoice. A list of available invoices from which you can select displays when you click this option.

NOTE: Have the employee write their Social Security Number in the **2. Social Security Number** field on the form when they sign the OF-288 for casuals. This number does not print on the form.

d. When generating a **Draft** invoice, click to select one of the following **Report Options:**

- OF-288 with Itemized Deductions
- OF-288 Only
- Itemized Deductions Only

NOTE: When you are printing an **Original Invoice** or a **Duplicate Original Invoice**, only the **OF-288 with Itemized Deductions** option is available.

- e. If this is the final invoice for the Resource, click to check the **Final Invoice** box.
- f. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button on the **Preview** window.
- g. To print the report without previewing it, click the **Print** button.
- h. To delete the last invoice for the selected resource, click the **Delete Last Invoice for Selected Resource** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	7.4 – Time: Entering and Editing Crews.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Define a crew as it pertains to Time.2. Define the two levels within a crew3. View or print a Crew Roster report.4. Edit crew information.5. Edit members on a crew.6. Add crew members to an existing crew.7. Create a crew.

I. CREW INFORMATION

- A. Identify a crew as it pertains to Time.
- B. Identify the two levels within a crew: the actual crew and crew members or operators.
- C. View or print a Crew Roster report.
- D. Edit crew information.
- E. Edit members on a crew.
- F. Add crew members to an existing crew.
- G. Create a crew.

II. IDENTIFY CREW

- A. Identify a crew as it pertains to Time.

NOTE: A Crew is more than one Resource sharing the same Request Number. Crews are built by attaching or rostering members to a Kind of Resource.

1. What is a crew?

- a. Handcrew.
- b. Engine members paid on an OF 288.
- c. Driver attached to a vehicle.
- d. Faller attached to a chainsaw and or vehicle.
- e. Helitack Crew.

2. A crew is defined as more than one resource sharing the same request number.

3. The same rules apply for crews as for personnel:

- a. Add crew and member data in **Resources**.
- b. Edit crew and member data and enter additional crew and member data in **Time**.

B. The two levels within a crew are:

- 1. The Actual Crew.
- 2. Crew Members or Operators.

C. To view or print a Crew Roster report:

- 1. Click the **Reports** button in the toolbar. Then click to select the **Time** tab.

OR

From the **Reports** drop-down menu, select **Time Reports**.

- 2. On the **Time Reports** window, click to select **Crew Roster**.

3. Under **Report Settings**, complete the following as appropriate:

- a. From the **Request Number** drop-down list, select the appropriate **Request Number**.

OR

From the **Crew Name** drop-down list, select the appropriate **Crew**.

- b. To preview then print the report, click the Preview button. Then click the Print Report button on the Preview window.
- c. To print the report without previewing it, click the **Print** button.
- d. When the **Print** window displays, click the **Print** button to send the report to the printer.

III. EDIT CREWS

NOTE: This next exercise simulates a typical environment, where an existing crew is defined in Resources.

NOTE: There are two levels of crew information with which you will work:

- At the **Crew Level**, you can **Add** or **Edit** Crew information.
- At the **Member/Operator Level**, you can **Add** or **Edit** individual crew member or operator information.

A. To edit crew information:

1. Open the **Time** module.
2. In the **Resources** grid, click the crew resource you want to edit.
3. Click the **Edit** button in the toolbar.
4. On the **Manage Resource – Edit Mode** window, review the common data. Then edit the crew data, as needed.
5. To save your changes, click the **Save** button.

B. To edit crew members rostered in resources:

1. Open the **Time** module.
2. In the **Resources** grid, click the plus sign (+) that displays to the left of a Crew. This displays a list of members rostered to the crew.
3. Click to select the **Crew Member** you want to edit.
4. Click the **Edit** button in the toolbar.
5. On the **Roster Resource – Edit Mode** window, review the common data. Then edit the personnel data, as needed.
 - a. To designate the resource as the crew leader, click to check the **Leader**

checkbox.

6. On the **Time** tab, edit personnel data, as needed. (Refer to “Entering and Editing Personnel Information” for specific instructions).
7. To save your changes, click the **Save** button.
8. To edit data for other members on the crew, click the **Previous** or **Next** button to display the previous or next crew member. Then follow the instructions in this section to edit the data, as needed.

IV. CREATE CREWS

NOTE: In some cases, a **Crew Leader** will show up on the Crew, but you must add the remaining Crew Members.

A. To add crew members to an existing crew.

1. In the **Resource** grid, click to select the **Crew** to which you are adding the crew members.
2. Click the **Edit** button in the toolbar.
3. On the **Manage Resource – Edit Mode** window, click the **Roster** button.
4. On the **Roster Resource – Add Mode** window, enter the following personnel data:
 - a. Request Number
 - b. Last Name
 - c. First Name
 - d. Kind/Position

NOTE: All crew members must have a kind code for their position. Do NOT use HC1 or HC2. This will effect the cost module. If a kind code is not defined, the cost will carry over as a hand crew for each member. If you are unsure of the crew member's position, just select FFT2.

- e. If the resource is a trainee, click to check to the **Trainee** checkbox.
 - f. Status
 - g. Unit ID
 - h. Agency (Optional)
 - i. To designate the resource as the crew leader, click to check the **Leader** checkbox.
5. On the **Plans** tab, enter any applicable data including:
 - a. Check-in Date
 - b. Check-in Time
 - c. Demob City

- d. Demob State
- e. Jetport
- f. Travel Method
- g. Other Quals

6. On the **Time** tab, select one of the following employment types from the **Employment Type** drop-down list:

- a. AD
- b. FED
- c. OTHER

NOTE: Use the **Members to Fed** button to change the **Employment Type** for all crew members without an employment type to **Fed**. Use the **Members to Other** button to change the **Employment Type** to **Other**. Click the **Arrow** next to the button to switch between **Members to Fed** and **Members to Other**.

7. If the **Employment Type** is **AD**, enter the resource's social security number in the **Social Security Number** and **Verify SSN** boxes.

NOTE: To protect the identity of the Resource, the Social Security Number will display as asterisks when you type it in the **Social Security Number** box. You must type it a second time in the **Verify SSN** box to ensure that the number is correct. If the two numbers do not match, the system will require you to enter them again.

NOTE: Resources with an **AD Employment Type** must have a **Social Security Number** defined or an **Original OF 288** will not print for them.

8. Enter any **288 Remarks**.

9. If **AD** is selected as the **Employment Type**, complete the following information under **Payment Information**:

- a. Click to check the **Initial Employment** checkbox, if appropriate.
- b. Click to check the **Return Travel** checkbox, if appropriate.
- c. From the **Point of Hire** drop-down list, select the appropriate point of hire.
- d. From the **Area** drop-down list, select the appropriate area.
- e. From the **Class** drop-down list, select the appropriate class.

10. If **Other** is selected as the **Employment Type**, enter the appropriate **Current Rate**.

11. Under **Personnel Mailing Address**, enter the following personnel data:

- a. Address 1
- b. Address 2
- c. City

- d. State
- e. Zip
- f. Phone
- g. Fax.
- h. To add the same address to all crew members without an address defined, select a crew member that has an address defined and click the **Propagate Address** button. The address is added to all of the crew members who do not have an address defined.

NOTE: To clear an address in a crew member record, select the crew member and click the **Clear Address** button.

12. To save your changes, click the **Save** button.

13. To add additional crew members, repeat the steps in this section.

NOTE: In this section, you will create a new Crew.

B. To create a crew:

1. Open the **Time** module.

2. Click the **Add** button on the toolbar.

3. On the **Manage Resource – Add Mode** window, enter the following crew data:

- a. Request Number
- b. Account Code
- c. Resource Name
- d. Kind/Position
- e. Status
- f. Unit ID
- g. Agency
- h. Configuration
- i. Release Date
- j. Release Time.

4. To save your changes, click the **Save** button.

5. Add crew members, as appropriate.

NOTE: For More information, Refer to the previous section, “To Add Crew Members To An Existing Crew.”

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 7.5 – Time: Posting Crew and Operator Time.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Use the Select All, Select None, and Invert Selection buttons.
 2. Post crew time using crew time reports (CTR's).
 3. Repost a day of time.
 4. Delete posted time.
 5. Copy and paste posted time.
 6. Post return travel time.
 7. Preview/print an OF 288 report.

I. CREW TIME

- A. Use the **Select All**, **Select None**, and **Invert Selection** buttons.
- B. Post crew time using crew time reports (CTR's).
- C. Repost a day of time.
- D. Delete posted time.
- E. Copy and paste posted time.
- F. Post return travel time.
- G. Preview/print an Emergency FireFighter Time Report (OF 288) report.

II. SELECT CREW MEMBERS

- A. To use the **Select All**, **Select None**, and **Invert Selection** buttons:

- 1. Open the **Time** module
- 2. Click the **Post Time** button in the **Time** toolbar.
- 3. In the **Resources** grid, click the appropriate crew resource.
- 4. Under **Crew Members** on the **Crew Post** tab, click the **Select All** button.

NOTE: Notice how all Crew Members are now selected.

- 5. Under **Crew Members**, click the **Select None** button.

NOTE: Notice how no Crew Members are now selected.

- 6. Under **Crew Members**, select several **Crew Members**.

- a. To select multiple crew members, hold down the **Ctrl** key while clicking each member you want to select.

OR

While holding down the **Shift** key, click the top and then the bottom crew member.

- 7. Click the **Invert Selection** button.

NOTE: Notice that all Crew Members not selected are now selected and those that were selected are not selected.

NOTE: To display the social security number for AD employees, click the **Show SSN** button. To hide social security numbers for AD employees, click the **Hide SSN** button.

- 8. To close the **Crew Post** window, click the **Close** button.

III. POST CREW TIME

NOTE: In this section, you will use the Crew Time Report (CTR) to Post Time to a Crew and

to Individual Crew Members.

NOTE: You can only post time to crew members with a **Checked In Status**.

A. To post crew time using Crew Time Reports (CTR's):

1. Open the **Time** module.
2. Click the **Post Time** button in the **Time** toolbar.
3. In the **Resources** grid, click the appropriate crew resource.
4. On the **Crew Post** tab, select the appropriate **Account Code** from the **Account Code** drop-down list.

NOTE: If you select an **Account Code** that is not the default for that resource, the code remains selected until a different resource or different account code is selected.

5. Under **Crew Members**, click to select the crew members for which you are posting time.
6. In the **Date** box, type the appropriate **Date** in the format MMDDYYYY.
7. If a special circumstance applies (e.g. Environmental Pay, Travel, Day Off, etc.), select the appropriate code from the **Special** drop-down list.

NOTE: If you assign the **GUAR**, **COP**, or **DAY OFF** special codes to a resource with an **Employment Type** of **FED** or **OTHER**, the **Start Time** and **Stop Time** boxes are disabled. You do not need to define a Start or Stop time when these special codes are assigned.

NOTE: If you assign the **GUAR**, **COP**, or **DAY OFF** special codes to a resources with an **Employment Type** of **AD**, the **Start Time** and **Stop Time** boxes are disabled and an **Hours** box displays. Enter the number of hours for the **AD** resource in this box. The maximum number of hours you can enter is eight.

8. In the **Start Time** box, either type the time or select it from the drop-down list to identify the time when the individual started working.
9. In the **Stop Time** box, either type the time or select it from the drop-down list to identify the time when the individual stopped working.
10. To commit the posting, click the **Save** button.

IV. EDIT CREW TIME

NOTE: In this section, you will Repost different hours for a Crew Member whose time was already posted for the day.

A. To repost time for a crew member:

1. Open the **Time** module.
2. Click the **Post Time** button in the **Time** toolbar.
3. In the **Resources** grid, click the appropriate crew resource.

4. On the **Crew Post** tab, select the appropriate **Account Code** from the **Account Code** drop-down list.
5. Under **Crew Members**, click to select the **Crew Member(s)** for which you are reposting time.

NOTE: Make sure you select the correct Crew Member(s).

NOTE: Locate the day and time you want to repost.

6. In the **Date** box, type the date for which you want to repost hours.
7. If a special circumstance applies (e.g. Environmental Pay, Travel, Day Off, etc.), select the appropriate code from the **Special** drop-down list.
8. In the **Start Time** box, either type the time or select it from the drop-down list to identify when the individual started working.
9. In the **Stop Time** box, either type the time or select it from the drop-down box to identify when the individual stopped working.
10. To commit the posting, click the **Save** button.
11. When the **Overlapping Hours** window displays, click the **Yes** button to overwrite the previous post with the current one.
12. To close the **Crew Post** window, click the **Close** button.

B. To delete posted time:

1. Open the **Time** module.
2. Click the **Post Time** button in the **Time** toolbar.
3. In the **Resources** grid, click the appropriate crew resource.
4. Under **Crew Members**, click to select the crew member(s) from whom you want to delete a time posting.
5. Under **Crew Member/Operator Post Detail**, click in the row that contains the time you want to delete. Then click the **Delete** button.
6. When the **Time: Delete Posting for Crew Member(s)** window displays, click the **Yes** button.
7. To close the **Crew Post** window, click the **Close** button.

C. To copy and paste posted time:

NOTE: You can Copy and Paste posted time by right clicking the mouse button in the row you want to copy or paste.

NOTE: You cannot Copy and Paste time postings that have a **Special Code** of **GUAR**, **COP** or **Day Off**.

1. Under **Crew Member/Operator Post Detail**, click the selector button on the far left of a row to select it.

2. Right-click the mouse in the selected row. Then click the **Copy Selected Postings** option in the menu that displays.
3. Under **Crew Members**, click to select the crew member to which you want to paste the copied post entry.
4. Right-click the mouse in the selected row. Then click the **Paste Copied Posting to Selected Member(s)** in the menu that displays.
5. On the **Crew Post Results** window, click the **OK** button.

V. RETURN TRAVEL TIME

A. To post return travel time with 0 (zero) hours:

1. Open the **Time** module.
2. Click the **Post Time** button in the Time toolbar.
3. In the **Resources** grid, click the appropriate crew resource.
4. Under **Crew Members** on the **Crew Post** tab, click to select the appropriate crew member(s).
5. Click to check the **Post Return Travel Start Time Only** checkbox.

NOTE: The **TVL** code is automatically selected in the **Special** box when the **Post Return Travel Start Time Only** checkbox is checked.

6. In the **Date** box, type the **Date** in the format MMDDYYYY.
7. In the **Start Time** box, either type the time or select it from the drop-down list to identify when the individual started working.

NOTE: No **Stop Time** is defined. If you do enter a **Stop Time**, the **Time** module removes it when you save the posting entry.

8. To commit the posting, click the **Save** button.
9. On the **Crew Post Results** window, click the **OK** button.
10. To close the **Crew Post** window, click the **Close** button.

NOTE: Notice that the number of hours in the grid is 0 (zero) for the posting.

B. To post Return Travel Time with hours defined:

1. Open the Time module.
2. Click the **Post Time** button in the **Time** toolbar.
3. In the Resources grid, click the appropriate Crew Resource.
4. In the **Date** box, type the date in the format MMDDYYYY.
5. Select the **TVL** option from the **Special** drop-down list.

NOTE: Make sure the **Post Return Travel Start Time Only** checkbox is NOT checked.

6. In the **Start Time** box, either type the time or select it from the drop-down list to identify the time when the individual started the return travel.
7. In the **Stop Time** box, either type the time or select it from the drop-down list to identify the time when the individual stopped the return travel.
8. To commit the posting, click the **Save** button.

NOTE: Notice that the number of hours displays in the grid for the posting. This number based on the **Start** and **Stop Times** that were defined.

9. To close the **Crew Post** window, click the **Close** button.

VI. PRINT INVOICE

A. To preview or print an Emergency FireFighter Time Report (OF 288) report:

1. Open the **Time** module.
2. In the **Resources** grid, click the appropriate crew resource.
3. Click the **Print Invoice** button in the **Time** toolbar.
4. On the **OF 288** window, identify the following information:
 - a. In the **Last Date Included on Invoice** box, enter the appropriate date. You can either type the date or select it from the drop-down calendar.
 - b. To create the final OF 288 for a resource leaving the incident, click to check the **Final Invoice** checkbox.
 - Click to select one of the following **Print Options**:
 - o **Preview/Print DRAFT Invoice** - Generates a Draft Invoice. Review this invoice, before printing an Original copy. The word Draft prints on this invoice.
 - o **Preview/Print ORIGINAL Invoice** - Generates an Original Invoice and locks all postings included in the invoice. When a posting is locked, you cannot make any changes to it.

NOTE: If a resource has a supply item that is not consumable issued to them and an Original Invoice is printed, a notification message displays indicating that the resource has supplies issued to them. Click the **OK** button to continue printing the invoice. Click the **Cancel** button to abort the print process.

- o **Preview/Print DUPLICATE ORIGINAL Invoice(s)** - When a parent crew is selected, a copy of the last Original Invoice that was printed for all crew member resources is reprinted. When a crew member is selected, a list of available invoices that you can reprint for the crew member displays.
 - a. When generating a **Draft** invoice, click to select one of the following **Report Options**:

- OF-288 with Itemized Deductions
- OF-288 Only
- Itemized Deductions Only

NOTE: When you are printing an **Original Invoice** or a **Duplicate Original Invoice**, only the **OF-288 with Itemized Deductions** option is available.

- e. If this is the final invoice for the Resource, click to check the **Final Invoice** box.
- f. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.
- g. To print the report without previewing it, click the **Print** button.
- h. When the **Print** window displays, click the **Print** button to send the report to the printer.

NOTE: Have the employee write their Social Security Number in the **2. Social Security Number** field on the form when they sign the OF-288 for casuals. This number does not print on the form.

- h. To delete the last invoice for the selected resource, click the **Delete Last Invoice for Selected Resource** button.

NOTE: A separate OF 288 is generated for each Crew Member. You can preview or print each OF 288, as needed.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	7.6 – Time: Entering and Editing Contracted Resources.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the relationship between contractors, agreements, and resources.2. Add/edit common data.3. Add/edit contractors, agreements, and administrative offices for payment.4. Add/edit resource specifications.5. Add/edit rates.6. Add/edit operator(s) for a contracted resource.

I. CONTRACTOR INFORMATION

- A. Identify the relationship between contractors, agreements, and resources.
- B. Add/edit common data.
- C. Add/edit contractors, agreements, and administrative offices for payment.
- D. Add/edit resource specifications.
- E. Add/edit rates.
- F. Add/edit operator(s) for a contracted resource.

II. CONTRACTORS, AGREEMENTS, & RESOURCES

- A. Identify the relationship between contractors, agreements, and resources.

NOTE: The following are important terms to understand when working with Contractors:

- **Contractor** – A business entity with available Resources.
- **Agreement** – An OF-294 that is attached to the contractor. A single Contractor may have many agreements or one agreement with several pieces of equipment on it.
- **Specifications** – Conditions that the Resource (Contractor) must meet to fulfill the agreement.

NOTE: It is not mandatory to have a Contract and an Agreement established prior to posting Time, but it may be necessary before processing an invoice.

III. COMMON DATA

- A. To edit common data:

1. Open the **Time** module.
2. On the **Main** grid, click to select the **Contract Resource** of your choice.
3. Click the **Edit** button in the **Main** toolbar.
4. On the **Manage Resource – Edit Mode** window, enter the appropriate common data.

IV. CONTRACTORS, AGREEMENTS & ADMIN OFFICES

- A. To add or edit contractors, agreements, and administrative offices for payment:

NOTE: Use the provided handouts to complete this exercise.

NOTE: You must first verify whether the contractor is defined in I-Suite before creating a Contract record. If the contractor is not defined, you will need to click the **Add Contractor** button to add a new contractor.

NOTE: You only need to enter a contractor name once.

1. On the **Time – Contracted** tab, select the appropriate contractor from the **Contractor Name** drop-down list. If the contractor name is not listed, use the following steps to

add the contractor:

- a. Click the **Add Contractor** button.
- b. On the **Add – Contractor** window, enter the following information:
 - Name
 - TIN (Tax Identification Number)
 - DUNS (D&B DUNS Number)
 - Address
 - City
 - State
 - Zip
 - Phone.
- c. To save the new contractor, click the **Save** button.

NOTE: If the agreement is not defined in I-Suite, you will need to click the **Add Agreement** button to add a new agreement.

- d. To close the **Contracts** window, click the **Close Contracts** button.

2. From the **Agreement Number** drop-down list, select the appropriate **Agreement Number**. If the agreement number is not listed, use the following steps to add the agreement:

- a. Click the **Add Agreement** button.
- b. On the **Add - Agreement** window, enter the following information:
 - Agreement Number
 - Beginning Date (MMDDYYYY)
 - Ending Date (MMDDYYYY)
 - Point of Hire (location at the time of hire)
 - Administrative Office For Payment.

If the appropriate office is not listed in the **Administrative Office For Payment** drop-down list, click the **Add New Administrative Office for Payment** button. Then enter the appropriate information for the office in the boxes that display. Click the **Save** button to save the office information.

NOTE: You only need to enter an Administrative Office For Payment once.

- c. To save the new agreement, click the **Save** button.
 3. Click the **Close** button until you return to the **Manage Resource - Edit Mode** window.
- B. To define resource information for the contractor:
 1. On the **Time – Contracted** tab, enter the following resource data:
 - a. In the **Unique Name or VIN** box, type a unique name for the resource or a VIN if the resource is a vehicle.
 - b. In the **Description 1** box, type an appropriate description (make, model, etc., if any).
 - c. In the **Description 2** box, type an appropriate description (make, model, etc., if any).
 - d. In the **286 Remarks** box, type any remarks you want to print on the OF-286 Invoice.
 - e. If the contracted resource has a government provided operator, click to check the **Gov't Operator** checkbox.
 - f. If the government is providing supplies to the contracted resources, click to check the **Gov't Supplies** checkbox.
 - g. In the **Date Hired** box, type the **Date Hired** in the format MMDDYYYY.
 - h. In the **Time Hired** box, type the **Time Hired**.
 - i. If the resource was withdrawn, click to check the **Withdrawn** checkbox.
- C. To define rates:
 1. On the **Time – Contracted** tab, complete the following information in the rates section:
 - a. From the **Rate Type** drop-down list, select the appropriate **Rate Type**.
 - b. From the **UOM** drop-down list, select the appropriate **Unit of Measure**.
 - c. In the **Rate \$** box, type the appropriate **Rate** for the selected **Rate Type** and **Unit of Measure**.
 - d. In the **Guarantee \$** box, type the appropriate **Guarantee** amount, if any.
 - e. In the **Description** box, type an appropriate **Description**, if any.
 - f. To save the rate, click the **Save Rate** button.
 - g. Repeat these same steps to add additional rates, as needed.
 2. After entering all **Time – Contracted** information, click the **Save** button.
 3. On the **Warning – Check for Correct Agreement/Contractor** window, click the **Yes** button.

NOTE: Make sure you always look at this message, before clicking the **Yes** button. It is easy

on a busy incident to make a mistake here.

V. OPERATORS

A. To add operators to a contracted resource:

NOTE: Not all Contracted Members/Operators require Time data.

1. Open the **Time** module.
2. In the **Resources** grid, click the appropriate contracted resource.
3. Click the **Edit** button in the toolbar.
4. On the **Manage Resource – Edit Mode** window, click the **Roster** button.
5. On the **Roster Resource – Add Mode** window, enter the appropriate information.

NOTE: If you are using the IAP module, you need to check the box for a **Leader** when rostering.

NOTE: The Member/Operator may have been added during the initial check-in process.

NOTE: Rostering a Member/Operator is the same as adding and editing Crews.

NOTE: Use the information listed on the handouts to add additional Contracted resources.

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 7.7 – Time: Posting Contract Resource Time.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Identify primary and special rate options.
 2. Post for each unit of measure.
 3. Identify when to use the ½ rate and the guarantee functions.
 4. Post contracted resource time.
 5. Repost a day of time.
 6. Delete a row of time.
 7. Preview/print an OF 286 report.

I. POST CONTRACTOR TIME

- A. Identify primary and special rate options.
- B. Post for each unit of measure.
- C. Identify when to use the ½ rate and the guarantee functions.
- D. Post contracted resource time.
- E. Repost a day of time.
- F. Delete posted time.
- G. Preview/print an Emergency Equipment – Use Invoice and/or Itemized Deductions (OF-286) report

II. POSTING OPTIONS

- A. Identify primary and special rate options.
- B. Understand posting for each unit of measure.
 - 1. To post a **Daily Rate** for Contracted Resources, complete the **Start Date** and **End Date** boxes.

NOTE: You can post for one date or for a range of up to five dates.

- 2. To post an **Hourly Rate** for Contracted Resources , complete the **Date**, and the **Start** and **Stop Time** boxes.

NOTE: To ensure a guarantee is posted for equipment that is still under hire but is not currently being used on any given day, enter a minimum of 15 minutes of work time and one mile of mileage.

- 3. To post **Mileage** for Contracted Resources, complete the **Date** and **Miles** boxes.
 - 4. To post **Each** for Contracted Resources, complete the **Date** and **Each** boxes.
- C. Identify when to use the ½ **Rate** and the **Guarantee** functions.
 - 1. The ½ **Rate** can apply to the **Primary**, **Special**, or **Both Rates** when posting. The ½ **Rate** will reduce the **Guarantee Amount** on Daily by half.
 - 2. To post for Equipment that is still under hire, but not currently being used on any given day, enter a **Minimum** for the **Specific Unit Of Measure** to trigger the **Guarantee**.
 - 3. The **Guarantee Amount** only displays on the OF 286. It does not display on the Incident Post-Posting Equipment window.

III. POST CONTRACTED RESOURCES TIME

- A. To post contracted resource time:

NOTE: For this exercise, you will use **Shift Tickets** to Post Time to Contracted Resources.

1. Open the **Time** module.
2. Click the **Post Time** button in the **Time** toolbar.
3. In the **Resources** grid, click the appropriate contracted resource.
4. From the **Primary** drop-down list, select the appropriate primary rate for the resource.
5. If applicable, select the appropriate rate from the **Special** drop-down list.
6. From the **Account Code** drop-down list, select the appropriate account code.
7. Under **Post Options**, click to select the appropriate option.

NOTE: Post options display based on the Primary and Special UOM's selected.

8. If one-half rate applies, click to check the $\frac{1}{2}$ **Rate** checkbox.
9. Enter the appropriate posting information for that **Rate Type** and **Unit of Measure**.
10. Complete the other fields based on the settings defined under **Posting Options**.
11. To commit the posting, click the **Save** button.

IV. EDIT TIME

- A. To repost different hours for a contracted resource that already had time posted for the day:

NOTE: When you repost **Contracted Resource Time**, you can add to the original posting or overwrite the existing entry.

NOTE: For this example, you will overwrite the existing entry.

1. Open the **Time** module.
2. Click the **Post Time** button in the **Time** toolbar.
3. In the **Resources** grid, click the appropriate contracted resource.
4. From the **Primary** drop-down list, select the appropriate rate for the resource.
5. If applicable, select a rate from the **Special** drop-down list.
6. From the **Account Code** drop-down list, select the appropriate account code.
7. Under **Post Options**, click to select the appropriate option.
8. If one-half rate applies, click to check the $\frac{1}{2}$ **Rate** checkbox.
9. Enter the appropriate posting information for that **Rate Type** and **Unit of Measure**.
10. Complete the other fields based on the settings defined under **Posting Options**.
11. To commit the posting, click the **Save** button.
12. On the **Already Posted** window, click the **Overwrite** button.

- B. To delete a row of posted time:

NOTE: For this exercise, you will delete Posted Time using the same Contracted Resource.

1. Open the **Time** module
2. Click the **Post Time** button in the **Time** toolbar.
3. In the **Resources** grid, click the appropriate contracted resource.
4. Under **Equipment Post Detail**, click anywhere in the row you want to delete. Then click the **Delete** button.
5. On the **Time: Delete Posting for Contractor** window, click the **Yes** button.
6. To close the **Contractor Post** window, click the **Close** button.

V. PRINT INVOICE

A. To preview or print an Emergency Equipment – Use Invoice and/or Itemized Deductions (OF-286) report:

1. Open the **Time** module.
2. In the **Resources** grid, click the appropriate contracted resource.
3. Click the **Print Invoice** button in the **Time** toolbar.
4. On the **OF-286** window, identify the following information:
 - a. Click one of the following options under **Select By**:
 - **Request Number** - Enter the request number in the **Request Number** box.
 - **Name** - Enter the name in the **Resource Name** box.
 - b. From the **Last Date Include on Invoice** drop-down list, select the appropriate **Date**.
 - c. If the resource is being demobed, enter the appropriate release date and time in the **Actual Release Date and Time** boxes.
 - d. To save the **Actual Release Date/Time**, click the **Save Release Date/Time** button.
 - e. Under **Print Options**, click to select one of the following:
 - **Preview/Print DRAFT Invoice** - Generates a Draft Invoice. Review this invoice, before printing an Original copy. The word Draft prints on this invoice.
 - **Preview/Print ORIGINAL Invoice** - Generates an Original Invoice and locks all postings included in the invoice. When a posting is locked, you cannot make any changes to it.

NOTE: If a resource has a supply item that is not consumable issued to them and an Original Invoice is printed, a notification message displays indicating that the resource has supplies issued to them. Click the **OK** button to continue printing the invoice. Click the **Cancel** button to abort the print process.

- **Preview/Print DUPLICATE ORIGINAL Invoice** - Generates a copy of an Original Invoice. A list of available invoices from which you can select displays when you click this option.

NOTE: Once an **Original Invoice** is created, that **Date Range** for the **Resource** is **Locked**. You cannot edit the information when it is Locked.

- f. When generating a **Draft Invoice**, click to select one of the following **Report Options**:
- OF 286 with Itemized Deductions
 - OF 286 Only
 - Itemized Deductions Only.

NOTE: When you are printing an **Original Invoice** or a **Duplicate Original Invoice**, only the **OF-286 with Itemized Deductions** option is available.

- g. If this is the final invoice for the Resource, click to check the **Final Invoice** box.
- h. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button on the **Preview** window.
- i. To print the report without previewing it, click the **Print** button.
- j. To delete the last invoice for the selected resource, click the **Delete Last Invoice for Selected Resource** button.

NOTE: You can only make changes by deleting the Original invoice if the invoice was not submitted for payment. Once an original invoice is included in the Export, you will not be able to delete it.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	7.8 – Time: Working with Adjustments.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Post an adjustment.2. Edit an adjustment.3. Delete an adjustment.

I. ADJUSTMENTS

- A. Post an adjustment.
- B. Edit an adjustment.
- C. Delete an adjustment.

NOTE: Working with Adjustments is very straightforward. Once you select a resource, enter the date, description of the item for which the adjustment is being made (e.g. Quarters and Lodging, Meals, Travel, etc.), and amount.

NOTE: You can review the details of Adjustments on the OF 288 and OF 286.

II. POST ADJUSTMENT

NOTE: For the next exercises, you will use the Commissary/Fuel Issue to Post Adjustments to Resources.

A. To post an adjustment:

1. Open the **Time** module.
2. Click the **Adjustments** button in the **Time** toolbar.
3. In the **Resources** grid, click the resource for which you are creating the adjustment.
4. From the **Activity Date** drop-down list, select the appropriate **Activity Date**.
5. If the resource has an **AD** employment type, the **Categories** box displays on the **Add Adjustments** window. From the **Categories** drop-down list, select the category to which the adjustment applies.
6. In the **Commodity** box, enter a description of the commodity (e.g. socks, boots, toiletries, etc.).

NOTE: If you identify a **Category**, you do not have to define a **Commodity**.

7. In the **Amount** box, type the purchase amount for the commodities. Use the format 99.99.
8. To save the adjustment, click the **Save** button.

III. EDIT ADJUSTMENT

A. To edit an adjustment:

NOTE: Once an Original Invoice prints, you cannot edit the Adjustment.

1. Open the **Time** module.
2. Click the **Adjustments** button in the **Time** toolbar.
3. In the **Resources** grid, click the appropriate resource.
4. On the **Adjustments** window, click to select the row you want to edit. Then click the

Edit button.

5. Edit the adjustment information, as needed.
6. To save your changes, click the **Save** button.

B. To delete an adjustment.

NOTE: Once an Original Invoice prints, you cannot delete the adjustment.

1. Open the **Time** module.
2. Click the **Adjustments** button in the **Time** toolbar.
3. In the **Resources** grid, click the appropriate resource.
4. On the **Adjustments** window, click to select the row you want to delete. Then click the **Delete** button.
5. To save your changes, click the **Save** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	7.9 – Time: Time Reports.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Run and print standard Time reports.2. Print/Fax a Personnel Time Report.

I. TIME REPORTS

- A. Print standard Time reports.
- B. Print/Fax a Personnel Time Report.

II. STANDARD REPORTS

- A. To print standard Time reports:

NOTE: I-Suite has a number of features that allow you to print Standard Reports.

1. Click the **Reports** button in the toolbar. Then click the **Time** button on the Reports window.

OR

From the **Reports** drop-down menu, select **Time Reports**.

2. Click to select one of the following reports:

- a. **Work/Rest Ratio** - This report identifies the ratio between work and rest for a resource at the incident.

NOTE: When calculating hours on shift, the system excludes time postings with a **Special Code** of **GUAR**, **COP** and **Day Off** from the **Work/Rest Ratio** report.

To generate a Work/Rest Ration report, complete the following Report Settings:

- Under **Sort by**, click to select the sort to use for the report.
- Select one of the following options:
 - o **Select a Specific or Partial Request Number** - Then select the number from the **Request Number** drop-down list.
 - o **Select a Specific Person** - Then select the name from the **Person** drop-down list.
 - o **Select all Personnel** - No other options are defined.
- Enter the appropriate **Start Date** and **End Date**.
- To print the report, click the **Print** button. To preview the report, click the **Preview** button.

- b. **Summary of Hours for Personnel** - This report contains a summary of the hours worked for All Personnel or a Specific Individual.

To generate a Summary of Hours for Personnel report, complete the following Report Settings:

- Click the **Select a Specific Person** option. Then select the person from

the **Select Person** drop-down list.

OR

Click the **Select All Personnel** option.

- To print the report, click the **Print** button. To preview the report, click the **Preview** button.

c. **Payment Summary of Equipment Usage** - This report identifies the total amount that was paid for the use of a specific equipment resource.

To generate a Payment Summary of Equipment Usage report, complete the following Report Settings:

- From the **Contractor** drop-down list, select the appropriate **Contractor**.
- To print the report, click the **Print** button. To preview the report, click the **Preview** button.

d. **Shifts in Excess of Standard Hours** - This report identifies the work shifts that went over the standard hours.

To generate a Shifts in Excess of Standard Hours report, complete the following Report Settings:

- Under **Sort by**, click to select the sort to use in the report.
 - Select one of the following options:
 - o **Select Specific or Partial Request Number** - Then select the number from the **Request Number** drop-down list.
 - o **Select a Specific Person** - Then select the name from the **Person** drop-down list.
 - o **Select All Personnel** - No other options are defined.
 - Enter the appropriate **Start Date** and **End Date**.
 - In the **Standard Hours** box, enter the standard hours to use in calculating the excess hours (e.g. if you enter 8, the report will include employees with hours in excess of 8).
 - To print the report, click the **Print** button. To preview the report, click the **Preview** button.
- e. **OF 288** - This report is the standard timekeeping record and payment document for federal and casual (AD) personnel involved in the fire fighting incident.

NOTE: An OF 288 includes all incidents and all accounting codes for the selected Request

Number, Crew Name, Person, or All Personnel.

NOTE: The OF 288 and OF 286 only include Time for the selected incident. To include Time for all incidents, switch to Manage All Incidents As One.

To generate an Emergency FireFighter Time Report (OF 288) report, click the OF-288 option. Then complete the appropriate Report Settings. (For additional instructions, refer to “Preview/print an Emergency FireFighter Time Report (OF 288) report” in the “Posting Personnel Time” section).

- f. **OF 286 and/or Itemized Deductions** - This report is the standard invoice for emergency equipment used at an incident.

To generate an Emergency Equipment Invoice and/or Itemized Deductions (OF 286) report, click the OF-286 and/or Itemized Deductions option. Then complete the appropriate Report Settings. (For additional instructions, refer to “Preview/print an Emergency Equipment – Use Invoice and/or Itemized Deductions (OF 286) report” in the “Posting Contract Resource Time” section).

- g. **Contractor Debits** - This report identifies debit amounts for a selected contractor.

To generate a Contractor Debits report, complete the following Report Settings:

- From the **Contractor** drop-down list, select the appropriate **Contractor**.
- To print the report, click the **Print** button. To preview the report, click the **Preview** button.

- h. **Commissary Authorization** - This is the standard form that firefighters must have to receive their pay or purchase any items from the Commissary. This form includes the person's name, social security number, and employment information.

To generate an Emergency FireFighter Commissary Authorization report, complete the following Report Settings:

- Select one of the following options:
 - o Select a **Specific Request Number** - Then select the number from the **Request Number** drop-down list.
 - o **Select a Specific Crew** - Then select the crew from the **Crew Name** drop-down list.
 - o **Select a Specific Person** - Then select the name from the **Person** drop-down list.
- To print the report, click the **Print** button. To preview the report, click the **Preview** button.

- i. **Equipment Management** - This report identifies the equipment being used at the incident.

To generate an Equipment Management report:

- Click to select **Equipment Management**.
- To print the report, click the **Print** button. To preview the report, click the **Preview** button.

- j. **Crew Roster** - The Crew Roster contains a list of all members assigned to the crew selected on the **Select Report** window.

To generate a Crew Roster report, complete the following Report Settings:

- From the **Request Number** drop-down list, select the appropriate **Request Number**.

OR

From the **Crew Name** drop-down list, select the appropriate **Crew**.

- To print the report, click the **Print** button. To preview the report, click the **Preview** button.

- k. **Commissary Charges by Date** - This report identifies resources that have made charges to the Commissary.

To generate a Commissary Charges by Date report:

- Click to select **Commissary Charges by Date**.
- To print the report, click the **Print** button. To preview the report, click the **Preview** button.

- l. **Personnel Time Report (Print / Fax)** - This report identifies posted time for FED or OTHER personnel. Only those personnel that meet the following requirements are included in the report:

- Time Posted
- Assigned fax number
- Employment code of FED or OTHER
- An employment status that is NOT D (Demobilized)

To generate a Personnel Time Report, complete the following Report Settings:

NOTE: For the people you want to include on the report, select a range of dates (**Start Date** and **End Date**) that includes the days for which **Time** was posted.

- From the **Start Date** drop-down list, select the appropriate **Start Date**.
- From the **End Date** drop-down list, select the appropriate **End Date**.

NOTE: When you select the date range, resources that meet the defined criteria display in the **Select Admin Offices** box on the left side of the window. If there are no entries in the box, then one or more of the criteria items was not met for the selected range of dates.

- In the **Time Unit Leader's Name** box, enter the **Time Unit Leader's Name**.
- In the **Time Unit Leader's Phone #** box, enter the **Time Unit Leader's Phone #**.
- If the fax numbers are long distance, click to check the **Assume calls are long distance** option.
- If a number must be dialed before placing a phone call (e.g., you have to dial 9 to get an outside line), click to check the **Dial outside line** checkbox. Then enter the number you must dial for the outside line.

NOTE: The agencies and payment offices that display in the box on the left side of the window can be expanded by clicking the Plus Sign (+) or collapsed by clicking the Minus Sign (-) next to the corresponding item.

- Under **Select Admin Office(s) for Payment**, click to check the checkbox next to each office you want to include in the report.

NOTE: When you select an agency, all offices from that agency are selected in the tree. You can select individual offices within an agency. However, you cannot select individual people in the tree. Selecting an individual person selects all people assigned to the same Fax number and includes them on the report.

- To print the report, click the **Print** button. To preview the report, click the **Preview** button.

NOTE: A new page is generated for each Fax number included on the report.

- To fax a Personnel Time Report directly from I-Suite, click the **Fax** button.

NOTE: Requirements for faxing a Personnel Time Report are:

- A Fax Modem that is properly installed and correctly configured.
- A Fax Printer Device properly set-up in the Printers folder.

To fax a Personnel Time Report directly from I-Suite, click the **Fax Report** button.

NOTE: A message displays instructing you to set your **Fax Printer as the Default Printer**. DO NOT click **OK** until the **Fax Printer** is set as the **Default Printer**.

Follow the on-screen prompts for faxing the report.

- After the **Personnel Time Report** has been faxed a dialogue will be displayed to print the **Personnel Fax Report Summary**.
- m. **Missing Days of Postings** - The Missing Days of Postings report identifies those resources with missing posted time.

To generate a Missing Days of Posting Report, complete the following Report Settings:

- Select one of the following options:
 - o **Request Number** - Then select the number from the **Request Number** drop-down list
 - o **Name** - Then select the name from the **Name** drop-down list.
 - o **All** - Then click either **Non- Contract Only (OF-288)** or **Contract Only (OF-286)**.
- Select one of the following **Sort By** options:
 - o Request #
 - o Name
- To print the report, click the **Print** button. To preview the report, click the **Preview** button.
- n. **List last posting Date by Resource** - This report lists the last posting date by resource name.

To generate a Last Posting Date by Resource List, complete the following Report Settings:

- Select one of the following options to identify the resources to include in the report:
 - o All Resources
 - o OF286 Resources
 - o OF288 Resources
- Click the **Sort** to use in the report. Then click the > button to add the sort to the **Sort By** box. Repeat this step for each sort you want to include.
- To print the report, click the **Print** button. To preview the report, click the **Preview** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	7.10 – Time: Advanced Contracting (Optional).
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Add complex contract information.2. Post time for contracted resources with complex contracts.

I. ADVANCED CONTRACTOR

- A. Identify existing contractors
- B. Add complex contract information.
- C. Attach agreement to contractor
- D. Link a contractor and agreement to a resource and rate.
- E. Identify key points for working with rate types and UOM
- F. Post time for contracted resources with complex contracts.

II. COMPLEX CONTRACTS

NOTE: This section identifies how to work with complex contracts for resources, such as contract crews and engines, portable toilets, and resources with multiple rates based on duration.

NOTE: Review contracts and shift tickets to add contractor data and to post time to contracted resources.

A. To identify existing contractors:

1. Open the **Time** module.
2. From the **Time** drop-down menu, select **Contractors**.
3. To view all contractors with agreements, click the **Contractors with Agreements** option. When you select this option, the grid at the bottom of the window displays a list of all contractors with agreements.
4. To view all contractors with resources, click the **Contractors with Resources** option. When you select this option, the grid at the bottom of the window displays a list of all contractors with resources.

B. To add a new contractor:

1. Open the **Time** module.
2. From the **Time** drop-down menu, select **Contractors**.
3. Click the **Add** button in the **Main** toolbar at the top of the window.
4. Complete the following information:
 - a. Name (Required)
 - b. TIN (Required)
 - c. DUNS
 - d. Address
 - e. City
 - f. State

- g. Zip
 - h. Phone
 - 5. Click the **Save** button to save the record. Then click the **Close** button to close the **Add Contractor** area at the bottom of the window.
- C. To create an agreement and attach it to a contractor:
 - 1. On the **Contractor** window, click the appropriate contractor in the grid.
 - 2. Click the **Add Agreement** button.
 - 3. Complete the following information:
 - a. Agreement Number
 - b. Begin Date
 - c. Expiration Date
 - d. Point of Hire
 - e. Administrative Office for Payment
 - 4. Click the **Save** button. To close the **Add Agreement** area at the bottom of the window, click the **Close** button.
 - 5. Click the **Close Contracts** button to close the **Contractor** window.
- D. To link a contractor and agreement to resources and rates:
 - 1. In the **Resources** grid, click the appropriate resource.
 - 2. On the **Time-Contracted** tab, select the appropriate contractor from the **Contractor Name** drop-down list.
 - 3. From the **Agreement Number** drop-down list, select the appropriate agreement number.
 - 4. Complete the following fields on the **Time-Contracted** tab:
 - a. Unique Name
 - b. Description 1 & 2
 - c. 288 Remarks
 - d. Hired Date & Time
 - e. If appropriate, click to check the **Gov't Operator** and **Gov't Supplies** checkboxes.
 - f. If appropriate, click to check with the **Withdrawn** checkbox.
 - g. From the **Rate Type** drop-down list, select the appropriate rate type.
 - h. From the **UOM** drop-down list, select the appropriate unit of measure.
 - i. In the **Rate\$** field, type the appropriate rate amount.
 - j. Click the **Save Rate** button to save the rate

5. Click the **Save** button on the **Time - Contracted** tab.

NOTE: Make sure you add all primary rates and special rates for mileage.

E. Key points for working with rate types and Units of Measure (UOM):

1. All contracted resources must have a primary rate designation.
2. A contracted resource may or may not have one to five special rate designations.
3. **Units of Measure** include **Daily, Each, Hourly, and Mileage**.
4. Make sure you match the correct rate type with the correct **UOM**.

F. Post time for contracted resources with complex contracts.

1. Open the **Time** module.
2. Click the **Post Time** button to open the Posting area at the bottom of the window.
3. In the **Resources** grid, click the contracted resource.
4. On the **Contractor Post** tab, select the appropriate account code from the **Account Code** drop-down list.
5. Under **Post Options**, click to select the appropriate **Rate Type**.
6. If one-half rate applies, click to check the **1/2 Rate** checkbox.
7. Post the appropriate information for that **Rate Type** and **Unit of Measure**.
8. Click the **Save** button to commit the posting.
9. Click the **Close** button to close the posting area at the bottom of the window.



UNIT 8

I-Suite Cost

7/12/2013

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I-Suite Cost

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STUDENT MANUAL

COURSE:	I-Suite
UNIT:	8.0 – Cost: Overview.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the purpose of the Cost module.2. Explain Data Ownership and the importance of Standard Operating Procedures.3. Identify the basic features of the Cost screen.

I. COST

A. Identify the purpose of the Cost module.

1. Use the **Cost** module to track individual resources. The system creates a line for every resource for every day. The Cost user can then analyze, manipulate, and create outputs of this information in a variety of report formats.

NOTE: Also use the **Cost** module to report costs for management decision making purposes. Reporting recipients include the Incident Team, the Team Management, the Host Agency, and the USFS Financial System.

B. Review the concept of Data Ownership and why Standard Operating Procedures are important.

1. *Data ownership* provides authority to various I-Suite users which allows them to change and manage specific data elements. This authority is established as a safeguard to ensure data integrity for all I-Suite users.
2. *Standard Operating Procedures* imply that users in each section of I-Suite communicate effectively with other users, which helps to identify those individuals who have "authority" for certain data elements (e.g. Resources typically has authority to change the resource status; a Time Recorder typically has authority to change or update a pay rate or an accounting code).

C. Identify the basic features of the Cost screen.

1. The **Cost** toolbar is located to the right of the **Filter** toolbar. The buttons in this toolbar include:
 - a. **Show Costs** - Click this button to display the **Manage Cost** grid at the bottom of the window. This grid contains a list of **Daily Costs** for a selected resource.
 - b. **Archive Resources** - Click this button to archive certain resources in the **Resources** grid. Any resources that are archived will not be included in any **Cost Processes** that are run.
 - c. **Sum** - When this option is checked, the total cost displays for the selected resource, as well as any rollup costs. The **Total** amount displays in the box to the right of the **Sum** option. The **Rollup** amount displays in the box to the right of the **Flow Down** option.

NOTE: The rollup costs include the cost of the parent and any subordinates.

- c. **Flow Down** - When this option is checked, the flow-down feature for the **Manage Cost** grid occurs. Flow-down allows you to change the **Quantity**, **Unit Cost**, **Units**, **Rate Type** or **Division** in the **Manage Cost** grid. When that information changes, the application changes (flows-down) the information in all of the Daily records below it that are not locked.
- d. **Rate Area** - To use a rate area other than the **Default Standard** rate area,

select it from the **Rate Area** drop-down list.

- e. **Resources Selected in Grid** - When this option is checked, only those resources selected in the **Resources** grid are included in any **Cost Processes** that are run.
- f. **Cost Processes** - Select a process from this drop-down list and click the **Run** button to run that process.
- g. **Run** - Click this button after you have selected a **Cost Process** to run that process.

2. The **Cost** drop-down menu at the top of the window contains the following **Cost** options:

- a. **Acres Burned** - Select this option to define acres burned information.
- b. **Cost Analysis Benchmark Setup** - Select this option to setup the data to use in the **Cost Analysis Report** you can print on the **Cost Report** window.
- c. **Divisions** - Select this option to define a division for **Cost Apportionment** purposes.
- d. **Graphs** - Select this option to create standard or custom **Cost Graphs**.
- e. **Accruals** - Select this option to create an **Accrual Extract**.
- f. **Projections** - Select this option to create **Cost Projections**.
- g. **Rates** - Select this option to define Rate Areas and Rates.

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 8.1 – Cost: Options.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Select grid columns and set the column order.
 2. Change the system date.

I. COST OPTIONS

- A. Select grid columns and set the column order.
- B. Change the system date.

II. RESOURCES GRID

- A. To identify the columns to display in the grid and the order in which to display them:

1. From the **Tools** drop-down menu, select **Options**.
2. On the **Options** window, click the **Cost** tab.
3. Under **Resource Grid Columns**, click the column you want to display or remove. Then click the **Show** or **Hide** button to identify whether to show or hide the selected column.
4. To move a column in the grid, click the column under **Resource Grid Columns**. Then click the **Move Up** or **Move Down** button to adjust the order in which the column displays.
5. When finished, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

NOTE: Grid columns can be sorted by clicking a column heading.

III. SYSTEM DATE

- A. To change the system date:

NOTE: Make sure the date and time are properly set for any PC running Cost. Set the System Date to allow for four to five days of data (At least five days after the Incident Start Date). If this unit is taught as part of the full course, you do not need to change the date and time again. It should have been set prior to any data entry.

1. On the **Windows Quick Launch** toolbar, right-click **Date/Time**. In the menu that displays, click **Adjust Date/Time**. The **Date and Time Properties** window opens.
2. Under **Date**, click to select the appropriate **Date**.
3. Under **Time**, enter the appropriate time.
4. To save your changes, click **Apply** and then **OK**.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	8.2 – Cost: Cost Processes.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Run Cost Processes.2. Create Cost Only.3. Update with Actuals Only.4. Create Cost & Update with Actuals.5. Create Cost, Update Actuals & Re-estimate6. Re-estimate7. Lock or Unlock a Daily Cost Entry.8. Exclude Resources from Cost Processes

I. COST PROCESSES

- A. Run Cost Processes
- B. Create Cost Only
- C. Update With Actuals Only
- D. Create Cost & Update With Actuals
- E. Create Cost, Update Actuals, & Re-estimate
- F. Re-estimate
- G. Lock or Unlock Daily Cost Entries
- H. Exclude Resources from Cost Processes

II. REVIEW PROCESSES

NOTE: The following are key concepts to understanding the Cost Processes:

- Each action is a separate process.
- Each process draws from distinct data in the Database.
- The processes do not overlap.

A. Review the Cost processes that you can perform.

1. **Create Cost, Update With Actuals & Re-estimate** - Creates estimated **Daily Cost** data from the **Rates** lookup table. Updates the data with any **Actual Costs**. Then re-estimates the cost for any existing **Daily Cost** records.
2. **Create Cost & Update With Actuals** – Creates estimated **Daily Cost** data from the **Rates** lookup table and updates the data with any **Actual Costs**.
3. **Create Cost Only** – Creates estimated **Daily Cost** data from the **Rates** lookup table.
4. **Re-estimate** - Re-estimates the cost in Estimated or Actual cost records with a zero (0.00) cost amount. For each of these records, the application recalculates the Rate Type Code, Unit, Quantity, and Unit Cost. It then compares the recalculated values with the previous values. If there is a difference, the record is updated with the new values and the Cost Update Level is set to Estimate.
5. **Update With Actuals Only** - Updates **Daily Cost** with **Actual Cost** data.
6. **Cost Lock/Unlock** – Locks (or unlocks) all cost records from the selected date forward.

III. CREATE/UPDATE DAILY COSTS

NOTE: Creating and Updating the Daily Costs is the first step that a Cost User must perform and should be completed before entering any data.

A. To Create Cost Create Costs, Update with Actuals, or Re-Estimate Costs:

1. Open the **Cost** module.
2. From the **Cost Processes** drop-down list, select one of the following:
 - a. Create Cost, Update Actuals, and Re-estimate
 - b. Create Cost & Update with Actuals
 - c. Create Cost Only
 - d. Re-estimate
 - e. Update With Actuals Only
3. Click the **Run** button.

NOTE: If you want to run a **Create**, **Update**, or **Re-estimate** process for only certain resources in the grid, click to check the **Select Resources in Grid** checkbox. Then click each of the resources in the grid that you want to include in the process. When you select a **Cost Process** and the **Run** button, the process is only run for those resources selected in the grid.

NOTE: If the **Select Resources in Grid** checkbox is NOT checked, the process is run for all resources that are **Checked In** with **Generate Daily Costs** selected on the **Cost** tab in Resources.

B. To Lock or Unlock Cost:

NOTE: This feature locks or unlocks all of the entries in the database for the defined dates. To preserve hand-keyed items for individual resources, use the **Lock** feature on the **Daily Records** screen.

1. Open the **Cost** module.
2. From the **Cost Processes** drop-down list, select **Cost Lock/Unlock**. Then click the **Run** button.
3. On the **Daily Cost Lock/Unlock** window, enter the appropriate **Start Date** and **End Date**. You can either type the dates or select them from the drop-down calendar.
4. Click the **Lock** or **Unlock** button, as appropriate.
5. To close the **Daily Cost Lock/Unlock** window, click the **Close** button.
6. When the message window displays, click the **OK** button to close the window.

IV. Exclude Resources from Cost Processes

NOTE: The Archive feature in I-Suite allows you to exclude Resources from any of the Cost Processes that you run.

A. Archive Resources Selected in the Grid

1. Open the **Cost** module.
2. Select the resources in the **Resource** grid that you want to exclude from the Cost Processes.

3. Click the **Archive** button.
4. Click to check the **Set archive flag for all resources currently selected in the grid** option.
5. Click the **Set Archive** button.

NOTE: To ensure that the Resources were archived, add the **Archived** column to your **Resource** grid. A checkmark displays in this column for each of the resources that were archived.

NOTE: If a resource was archived that you want to include in the Cost Processes, click the **Unset Archive** button instead of the **Set Archive** button.

B. Archive Resources with Release Date

NOTE: This process will archive all resources with **Actual Release Dates** prior to the current date. To ensure that this process works correctly, you must enter **Actual Release Dates** that are prior to the current date for all resources you want to archive.

1. Open the **Cost** module.
2. Click the **Archive** button.
3. Click to check the **Set archive flag for all resources with a release date prior to today** option.
4. Click the **Set Archive** button.

C. Archive Resources with Estimated Date of Arrival

NOTE: This process will archive all resources with **Estimated Dates of Arrival** that are prior to the current date. To ensure that this process works correctly, you must enter **Estimated Dates of Arrival** that are prior to the current date for all resources you want to archive.

1. Open the Cost module.
2. Click the Archive button.
3. Click to check the **Set archive flag for all resources with an estimated date of arrival prior to today** option.
4. Click the **Set Archive** button.

REVIEW UNIT OBJECTIVES

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	8.3 – Cost: Rates.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. View the default rates used to calculate costs for specific resources.2. Create a new rate area.3. Add rates to a rate area other than the “Default Standard” rate area.

I. COST RATES

NOTE: Standard rates for resources such as crews, engines, overhead, fallers, pickups, and fuel tenders are included in the Cost module. The main function of the Rates option is to determine a default rate for a Kind of resource. You can define numerous types of rates for a number of different Kinds of resources.

- A. View the default rates used to calculate costs for specific resources.
- B. Create a new rate area.
- C. Add rates to a rate area other than the “Default Standard” rate area.

II. DEFAULT RATES

A. To view the default rates used to calculate costs for specific resources:

1. From the **Modules** drop-down menu, select **Cost**.

OR

On the **Tool** bar, click the **Cost** button.

2. From the **Cost** drop-down menu, select **Rates**.
3. On the **Rate Area / Rates** window, click the **Rates** tab.
4. From the **Rate Areas** drop-down list, select the appropriate **Rate Area**. Then click one of the following to identify the Kind codes to display under **Kind**:
 - a. All Kinds
 - b. With Values Only.
5. Under **Kinds**, click to select the **Kind** with the rates you want to review.
6. Under **Rates**, review the rates defined for the selected **Kind**.
7. To close the **Rate Area / Rates** window, click the **Close** button.

III. RATE AREA

A. To create a new rate area:

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Rates**.
3. On the **Rate Area / Rates** window, click the **Rate Area** tab. Then click the **Add** button.
4. In the **Area Name** box, enter the name to assign to the **Rate Area**.
5. If you want the rate area to be viewable on the main **Cost** window, click to check the **Viewable** checkbox. When the rate area is available on the **Cost** window, it can be used in the **Create Cost** process.

6. To save the new rate area, click the **Save** button.
7. To close the **Rate Area / Rates** window, click the **Close** button.

IV. RATES

NOTE: Only add Rates to Kind Codes that require a rate different from the **Default Standard Rate**. The application will use the rate from the **Default Standard Rate Area** for Kind Codes without a defined rate.

A. To add rates to a rate area other than the **Default Standard** rate area:

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Rates**.
3. On the **Rate Area / Rates** window, click the **Rates** tab.
4. From the **Rate Areas** drop down list, select the **Rate Area** to which you want to add rates. Then click one of the following to identify the Kind codes to display under **Kind**:
 - a. All Kinds
 - b. With Values Only.
5. Under **Kinds**, click to select the **Kind** for which you want to define rates.
6. In the **Rates** grid, type the rates you want to assign to the kind code in the appropriate boxes.
7. Click the **Save** button to save the rates to the selected rate area.
8. When the **Data Saved** window displays, click the **OK** button to close the window.
9. Click the **Close** button to close the **Rate Area/Rates** window.

NOTE: To use a **Rate Area** other than the **Default Standard Rate Area**, select the appropriate **Rate Area** from the **Rate Area** drop-down list on the **Cost** window.

REVIEW UNIT OBJECTIVES

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	8.4 – Cost: Resources.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Add resource data from the Cost module.2. Edit resource data from the Cost module.3. Identify common data.4. Identify Cost data.

I. COST RESOURCE

- A. Add resource data from Cost.
- B. Edit resource data from Cost.
- C. Explain common data.
- D. Explain Cost data.

II. RESOURCE DATA

A. Add resource data from the Cost module.

- 1. Open the **Cost** module.
- 2. Click the **Add** button in the toolbar.
- 3. In the **Manage Resource – Add Mode** area, enter the following required information:
 - a. Request Number
 - b. Account Number
 - c. Resource Name/Last Name First Name
 - d. Kind/Position
 - e. Status
 - f. Configuration
- 4. Click the **Save** button to save the information.

B. To edit resource data from the Cost module:

- 1. Open the **Cost** module.
- 2. In the **Resources** grid, click the appropriate resource.
- 3. Click the **Edit** button in the toolbar.
- 4. In the **Manage Resource – Edit Mode** area, edit the appropriate information. Click the **Save** button to save your changes.

C. Review common data.

- 1. Open the **Cost** module.
- 2. In the **Resources** grid, click the appropriate resource.
- 3. Click the **Edit** button in the toolbar.

NOTE: Entry items located above the tabs (i.e. just below the **Manage Resource-Edit Mode** label) are common to all I-Suite modules.

NOTE: Data entry items for specific modules are located on their respective tabs (i.e. on the **Plans, Cost, and Time** tabs.)

NOTE: Resources is the primary data entry point for I-Suite data. The quality of the initial

data is critical to the successful integration of the data into other I-Suite modules.

- a. Make sure each member is identified with the correct **Kind Code** (i.e. FFT1, CRWB, etc.).

NOTE: It is critical that **Kind Codes** are correct for **Subordinate Resources** (e.g. If the Kind Code HC1 is used for 20 members of a Type 1 crew, the Cost module will calculate 20 HC1 estates at \$8,200 for each member into a rollup cost of \$164,000.)

- b. Leave the **Agency Code** blank for **Subordinates of Contract Resources** that do not incur a separate cost (e.g. Contract Dozer Operators).

NOTE: Understanding the concept of **Data Sharing** is critical. Data is shared between all I-Suite modules. Changes, additions, or deletions from any functional area affects the other I-Suite modules. Successful integration requires cooperation and established **Data Ownership Rules**.

Example: Cost should only delete those resources entered by the Cost unit.

III. COST DATA

A. To add Cost data:

1. Open the **Cost** module.
2. In the **Resources** grid, click the resource to which you want to add Cost data.

NOTE: Cost data can be added to rostered resources, as well as non-rostered resources.

3. Click the **Edit** button to open the **Manage Resource - Edit Mode** area at the bottom of the window.
4. Click the **Cost** tab, then enter the following information:

- a. Select an agency from the **Payment Agency** drop-down list.

NOTE: The **Payment Agency** is the agency responsible for payment of the resource. Data entered in this field is also used to determine the accrual code.

NOTE: When adding Cost data to a rostered resource, you cannot select the Payment Agency. This defaults to the agency selected for the parent resource.

NOTE: Make sure you always select a **Payment Agency** in **Cost Apportionment** situations.

- b. In the **Assign Date** box, enter an assign date. The **Assign Date** is the date when the resource begins receiving payment and is the same as the **Hire Date** for **Contract Resources** in the **Time** module. You can either type the date or select it from the drop-down calendar.
- c. Select the appropriate **Accrual Code** from the drop-down list. This code may automatically be selected based on the **Request Number, Agency, Kind Code, Incident State, Contracting Agency, and Employment Type** (AD or Other) that is defined.

NOTE: The system default for the accrual code should be used in most cases. Only make a manual correction if you know the default is incorrect. For example, if you want the accrual code to be excluded from cost accruals, select EXCL (Exclude).

- d. To prevent the **Cost Accrual Code** from being changed for a resource, click to check the **Lock Accrual Code** checkbox.
- e. In the **Cost Remarks** box, you can enter any remarks related to the cost information.
- f. Click to check the **Generate Daily Costs** checkbox if you want costs generated for a resource.

NOTE: The Daily record is only created if the **Generate Daily Costs** checkbox is checked for the Checked-In parent resource. If the **Generate Daily Costs** checkbox is not checked for the Parent Crew Record, the **Create Daily Record** function is turned OFF for ALL of the Crew Members. To turn Create Daily ON, check the **Generate Daily Costs** checkbox.

STUDENT MANUAL

- COURSE: I Suite
- UNIT: 8.5 – Cost: Daily Records.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Utilize the Manage Cost grid.
 2. Define three different cost levels.
 3. Use the Flow Down and Lock/Unlock processes.
 4. Enter a Release Date and identify the impact.
 5. Enter Daily data for resources.

I. DAILY COST RECORDS

- A. Utilize the Manage Cost grid.
- B. Review Cost Level data.
- C. Use the Flow Down and Lock/Unlock processes.
- D. Enter a release date for a resource.
- E. Enter Daily data resources.

NOTE: You must run the **Create Cost** process before you can enter costs.

II. MANAGE COST GRID

NOTE: Displaying the **Manage Cost** grid gives you a direct visual link to the relationship between Resource records and Daily records.

- A. To display the Manage Cost grid:
 - 1. Open the **Cost** module.
 - 2. Click the **Show Cost** button in the **Cost** toolbar.
 - 3. In the **Resources** grid, click a resource.

NOTE: Every Resource record listed in the **Resources** grid has associated records that include the Costs of that Resource for every day the Resource is assigned to the incident. These records display in the **Manage Cost** grid, which displays at the bottom of the window when you click the **Show Cost** button.

NOTE: Cost provides a number of ways in which to add, update, and display the **Detail Cost Data** in the **Daily Records** associated with each Resource.

NOTE: The **Daily Record** is only created if the **Generate Daily Costs** checkbox is checked for the **Checked-In** parent resource.

NOTE: The Cost module uses either the **Check-In Date** or the **Assign Date**, whichever is earlier, to generate costs.

NOTE: The Cost module uses the **Actual Release's Estimated Date of Arrival** defined in Demob to identify when to stop generating Daily Cost records for a resource. If the **Estimated Date of Arrival** is not defined for a resource, the application uses the **Actual Release Date**.

- B. Review Cost Level data.
 - 1. The **CL** (Cost Level) column identifies the source of cost data. There are three types of cost level data:
 - a. E (Estimate).
 - b. A (Actual).

- c. U (User-updated or flow down from Actual).

NOTE: When the cost data in a Daily Cost record is updated by **Actual** data from Time, any Daily Cost records created after the updated date contain a U Cost Level. This indicates that the amount in the Daily Cost record was not estimated, but flowed down from the **Actual** cost data record.

2. **E** (Estimate). Cost level data is estimated from the rates lookup table.

- a. Select a resource that has no actual time posted.
- b. Click the **Show Cost** button to display the **Manage Cost** grid.
- c. Notice that the posted time in the **Manage Cost** grid displays as **Estimate (E)** under the **CL** column.

3. **A** (Actual). Cost level data is from **Time** records. You must specify a resource for posting time.

- a. In **Time**, post time for the selected resource.
- b. In **Cost**, select the **Update with Actuals** option from the **Cost Processes** drop-down list. Then click the **Run** button.
- c. Click the **Show Cost** button to display the **Manage Cost** grid.
- d. Click the resource for which you just posted **Time** in the **Resources** grid. Notice that the posted time in the **Manage Cost** grid displays as **Actual Time (A)** under the **CL** column.

4. **U** (User-updated or flow down from Actual). Cost level data is determined by the Cost unit.

- a. Click the **Show Cost** button to open the **Manage Cost** grid.
- b. In the **Resources** grid, click the resource you want to update.
- c. In the **Manage Cost** grid, click the **Daily Cost** record you want to update.
- d. Make the appropriate changes to the **Unit** or **Unit Cost**.
- e. Click the **Save** button.
- f. Notice that the entry under the **CL** column has changed to **User Updated (U)**.

C. To use the Flow Down and Lock Record options:

- 1. Open the **Cost** module
- 2. In the **Resources** grid, click a resource.
- 3. Click to check the **Flow Down** checkbox in the **Cost** toolbar at the top of the window.
- 4. If the **Manage Cost** grid is not open, click the **Show Cost** button to open it.
- 5. Modify the **Unit Cost**. Then click the **Save** button.

NOTE: The **Flow Down** changes the **Unit Cost** for all entries from the selected date forward.

6. To lock an entry in the **Manage Cost** grid, click the entry to select it. Then click the **Locked** option that displays in the area just above the **Manage Cost** grid.

7. Modify the **Unit Cost**. Then click the **Save** button.

NOTE: The **Flow Down** changes the **Unit Cost** for all entries from the selected date forward, except for the **Locked** records.

NOTE: The **Lock** feature is a valuable feature for **Cost** to preserve hand-keyed data entries.

NOTE: Use the **Flow Down** option with caution.

D. To enter a release date for a resource:

NOTE: Designating an **Actual Release Date** stops **Cost** from generating **Daily Cost** records for a given resource. A **Demobed Resource** continues to generate costs until an **Actual Release Date** is entered.

1. In the **Resources** grid, select the resource to which you want to assign a release date. Then click the **Edit** button.
2. In the **Manage Resource** area, type the **Actual Release Date** in the **Actual Release Date** text box.
3. Click the **Save** button.

NOTE: Determine the last date of **Actual Time** for that resource, and then enter that last date as the **Actual Release Date**.

NOTE: Coordinate with the **TIME** unit to determine the actual release dates.

NOTE: Open the **Manage Cost** grid in the **Cost** module. Notice that **Daily Records** for the edited resource no longer display beyond the **Release Date**.

E. To edit Daily Cost data for a Resource:

1. In the **Resources** grid, click a resource.
2. Click the **Show Cost** button.
3. In the **Manage Cost** grid, click the entry you want to edit.
4. In the area above the **Manage Cost** grid, enter the appropriate **Daily Cost** information for the selected resource.
5. To save your entries, click the **Save** button.

F. To delete a Daily Cost record for a Resource:

1. Select one or more cost records in the **Manage Cost** grid.
2. Click the **Delete** button.
3. A confirmation message will display.
4. Click **Yes** to continue.

NOTE: Deleted Daily Cost records will re-generate with estimates or actual costs, when the cost process is run.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	8.6 – Cost: Cost Reports.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Run and print standard Cost reports.2. Run and print other standard Cost reports.3. Export Cost reports data.

I. COST REPORTS

- A. Run and print standard Cost reports.
- B. Run and print other standard Cost reports.
- C. Export Cost reports data.

II. PRINT STANDARD REPORTS

- A. To print a standard Cost report:

NOTE: You can print a number of pre-designed **Cost** reports for management decision making purposes. You can select a general format, determine the **Sort** and **Filter** criteria, and then **Preview**, **Print** or **Export** the data.

1. Open the **Cost** module.
2. Click the **Reports** button in the **Cost** toolbar to open the Cost Reports window.

OR

From the **Reports** drop-down menu, select **Cost Reports**.

3. Under **Report Categories**, click **Sort Categories**. In the area beneath **Report Categories**, click to select one of the following reports:

- a. Accounting
- b. Agency
- c. Payment Agency
- d. Division
- e. Home Unit
- f. Incident
- g. Accrual
- h. Section

NOTE: For this exercise, select the **Incident Sort Category**.

4. Click to check the **Selected Date Range** checkbox.

NOTE: If you do not check the **Selected Date Range** checkbox. The report defaults to the entire date range.

5. In the **Date Range** boxes, enter the appropriate beginning and ending dates. You can either type the dates or select them from the drop-down calendars.
6. Under **Reports**, click to select the **Report** you want to print:

NOTE: The information in the report is based on the category you selected under **Report Categories**. This also includes the **Underutilized** report category that displays when you

select **Other Categories**.

- a. **Weekly Summary** - This report contains a summary of the costs for each day of the defined week. The cost information is broken down by **Kind Group** and **Direct/Indirect**. A **Daily Total** is included at the bottom of each date column.
- b. **Weekly Detail** - This report contains detailed cost information for each day of the defined week. The cost information is broken down by **Kind Code** and **Direct/Indirect**. A **Daily Total** is included at the bottom of each date column.
- c. **Weekly Detail O/H Personnel** - This report contains detailed overhead personnel cost information for each day of the defined week. The cost information is broken down by **Personnel Resource**, **Kind Code**, and **Direct/Indirect**. A **Daily Total** is included at the bottom of each date column.
- d. **Daily Summary** - This report contains a summary of the costs for the current system date. The information is broken down by **Crews**, **Line Personnel**, and **Camp Personnel**.
- e. **Cumulative Cost Detail** - This report identifies the **Daily Cost** for each day the incident has been open. The information is broken down by **Resource/Kind Codes**.
- f. **Cumulative Cost Detail O/H Personnel** - This report identifies the **Daily Cost** for each day the incident has been open. The information is broken down by the **Kind Code** and then the **Personnel Resource**.
- g. **Category Total** - This report identifies cost totals based on the **Category**.

NOTE: The name of the **Category Total** report changes, based on the **Report** you are printing. For example, for an **Incident** report, this would be **Incident Category Total**.

- h. **People Weekly Summary** - This report contains a summary of the people working on the incident for each day of the defined week. The information is broken down by **Kind Code** and **Direct/Indirect**. A **Daily Total** is included at the bottom of each date column.
 - i. **People Daily Summary** - This report contains a summary of the people working on the incident for the current system date. The information is broken down by **Crews**, **Line Personnel**, and **Camp Personnel**.
7. To roll up costs to the primary resource, click to check the **Rollup Costs to Primary Resource** checkbox under **Additional Filters**.
8. Under **Additional Filters**, click to select one of following additional filters, as appropriate:
- a. Resources where Kind is blank
 - b. Resources where Kind has entry

- c. Include all (Kinds)
- d. Selective Kinds

9. To preview the report, click the **Preview** button.
10. To print the report, click the **Print** button.
11. When finished, click the **Close** button to close the window.

III. OTHER COST REPORTS

A. To generate Other Cost reports:

1. Under **Report Categories**, click **Other Categories**.
2. In the area under **Report Categories**, click one of the following reports:

a. **Analysis:**

- **Resource** - This report can identify the average cost by Kind that exceeds the standard cost. It can also identify the individual costs by resource that exceeds the maximum rate.
- **Accountability** - This report identifies the percentage of resource types (i.e. Aircraft, Crew, Equipment, Support, Direct) defined for the incident and compares the **Current Values** with the **Standard Values**. The **Difference** and **Standard Deviation** are listed for each resource type.
- **Exception** - This report identifies resources that meet the selected filter requirements. You can select any of the following filters for this report:
 - o Resource Status is D but No Release Date is Entered.
 - o Resources with no actual Time posted
 - o Resource Daily Cost exceeds a defined amount.

NOTE: You can define the amount for this filter in the box that displays to the right of this filter option.

- o Resource with Actual Time Posted, but has a defined number of days with Unposted time.

NOTE: You can define the number of days for this filter in the box that displays to the right of this filter option.

b. **Acres NVC:**

- **Resource Loss (Summary)** - This report contains a high level view of the acres that were lost and the Net Value Change (NVC) resources that were affected. The information in this report is based on values defined on the **Acres Burned NVC/FIL** window.
- **Resource Loss (Mid - Level)** - This report contains a mid-level view

of the acres that were lost and the NVC resources that were affected. The information in this report is broken down by **NVC Subtotals** for each date. The information in this report is based on values defined on the **Acres Burned NVC/FIL** window.

- **Resource Loss (Detail)** - This report contains detailed information about the acres that were lost and the NVC resources that were affected. In addition to the information included in the **Resource Loss (Mid-Level)** report, this report includes information about the **Fuel Intensity Level (FIL)**. The information in this report is based on the values defined on the **Acres Burned NVC/FIL** window.
- **Acres Burned** - This report contains the information that was defined on the **Acres Burned** window.

c. **Aircraft:**

- **Cumulative Air Costs Report.** This report identifies the air costs based on those resources that were assigned **Air kind codes** (i.e. AT).

d. **Cost Share:**

- **Cost Share Summary** - This report identifies the **Daily Cost** for the **Shift** on the listed dates. It also identifies the **Federal, State, and Other** percentage of the cost obligations for the **Shift** on the listed dates.
- **Cost Share by Shift and Kind** - This report identifies the **Daily Cost** for the **Shift** and **Kind** on the listed dates. It also identifies the **Federal, State, and Other** percentage of the cost obligations for the **Shift** and **Kind** on the listed dates.
- **Cost Share Detail** - This report contains detailed **Cost Apportionment** information for listed **Shifts** and **Resources**. This information includes **Daily Cost, Federal Cost, State Cost, and Other Cost**.
- **Cost Share Resource Worksheet** - This report contains **Cost Apportionment** information for listed **Resources**. This information includes **Daily Cost, Federal Cost, State Cost, and Other Cost**.

e. **Resource/Kind:**

- **Resource Kind by Cost** - This report identifies cost information based on kind and resource codes.
- **Resource Kind by Cost O/H Personnel** - This report identifies cost information based on overhead personnel resources.

f. **Underutilized** - This report lists any resources that were checked as

underutilized in the **Daily Records** screen.

IV. EXPORT REPORTS

NOTE: In Cost, you can export data to **Word, Excel, PDF,** or **TXT**. For this exercise, you will export a report to Excel.

A. To export a report to Excel:

1. Preview the report of your choice.
2. Click the **Export Report** button.
3. From the **Format** drop-down list, select the **MS Excel** option. Then click the **OK** button. An **Excel Format Options** window displays.
4. Under **Column width**, identify the width of the columns to use. You can either select the **Column width based on objects in the Report** or define a **Constant column width (in points)**.
5. To include the page header and page footer, click to check the **Page Header and Footer** checkbox.
6. To create page breaks for each page, click to check the **Create page breaks for each page** checkbox.
7. To convert data values to strings, click to check the **Convert data values to strings** checkbox.
8. You can include **All pages** in the report or define a page range in the **From** and **To** boxes
9. Click the **OK** button to export the report. A **Select Export File** window displays.
10. From the **Save in** drop-down list, select the directory where you want to save the **Excel** file.
11. In the **File name** box, enter the name you want to assign to the Excel file.
12. Click the **Save** button to export the file.
13. Open the report in **Excel** from the location where the file was saved.

NOTE: Once you save a file in Excel, you can use Excel to create charts and graphs, as needed.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	8.7 – Cost: Graphs.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Generate pre-designed graphs.2. Customize a pre-designed graph.

I. COST GRAPHS

- A. Generate pre-designed graphs.
- B. Customize a pre-designed graph.

NOTE: Graphing Incident data provides a powerful visual feature to supplement reports for management decision making purposes.

II. GRAPH CONTROL WINDOW

- A. Use the Graph Control window to change the appearance of a graph.

NOTE: The style of graph selected determines the options that are available on the Graph Control window. For example, the options under the Error Bar tab apply to a 2D bar chart but not a 3D pie chart. For additional information on specific features, use the Help function.

III. PRE-DESIGNED GRAPHS

NOTE: Cost allows you to produce a number of pre-designed graphs for management decision making purposes. You can select a general format and then modify the graphical display for presentation. Cost Graphing offers several standard graphs.

- A. To generate pre-designed graphs:

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Graphs** to open the **Cost Graphs** window.
3. Under **Graph Types**, click to select one of the following graph types:
 - a. Aircraft Cost Per Gallon Delivered
 - b. Aircraft Flight Cost
 - c. Aircraft Gallons Per Hour
 - d. Aircraft Total Gallons Dropped
 - e. Aircraft Utilization
 - f. Cost By Date
 - g. Division Cost By Date
 - h. Total Cost

NOTE: For this exercise, use the **Total Cost** graph.

4. Review the graph, and then click the **Close** button.

NOTE: The **Cost By Date Graph** displays an Area Chart of Total Incident Costs By Date.

- B. To generate a Cost By Date graph:

1. Open the **Cost** module.

2. From the **Cost** drop-down menu, select **Graphs** to open the **Cost Graphs** window.
3. Under **Graph Types**, click to select **Cost by Date**.
4. From the **Date(s)** drop down lists, select the **Dates** to include in the graph.
5. From the **Incident** drop down list, select the Incident to include in the graph.
6. Click the **Fonts** button in the graph toolbar to open the **Graph Control** window.
Modify the **Typeface** and **Size** of the **Graph Title**.
7. To save your changes, click the **Apply Now** button, and then click the **OK** button.
8. Click the **Options** button at the bottom of the window to open the **Graph Options** window. Under **Graph Titles**, enter a second graph title in the **Bottom Line 1** box.
This title displays beneath the graph.
9. To save your changes, click the **Apply** button.
10. Review the graph, and then click the **Close** button.

NOTE: For this exercise, use the **Aircraft Utilization Graph**.

C. To generate the Aircraft Utilization graph:

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Graphs** to open the **Cost Graphs** window.
3. Under **Graph Types**, click to select **Aircraft Utilization**.
4. From the **Date(s)** drop down lists, select the **Dates** to include in the graph.
5. From the **Aircraft(s)** drop down list, select **All Aircraft**.
6. Review the graph, and then click the **Close** button.

IV. CUSTOMIZE GRAPHS

NOTE: You can build on the standard graphs by altering the display.

A. To customize a pre-designed graph:

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Graphs** to open the **Cost Graphs** window.
3. Under **Graph Types**, click to select **Total Cost**.
4. Follow the directions on the **Cost Graphs** handout from your student binder.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	8.8 – Cost: Accruals.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify US Forest Service accruals.2. Identify reportable US Forest Service accrual categories.3. Explain the logic/criteria for each reportable accrual category.4. Identify the Accrual Fiscal Year.5. Add/edit an Accrual Code (Accounting Code).6. Assign an Accrual Override Code to incident resources.7. Create an accrual extract.8. Run/preview an accrual report.9. Finalize and print an accrual report for submission to the host agency or forest.10. Export an accrual report in PDF format.11. Explain when AD Draw Down occurs.

I. COST ACCRUALS

- A. Identify US Forest Service accruals.
- B. Identify reportable US Forest Service accrual categories.
- C. Explain the logic/criteria for each reportable accrual category.
- D. Identify the Accrual Fiscal Year.
- E. Add/edit an Accrual Code (Accounting Code).
- F. Assign an Accrual Override Code to incident resources.
- G. Create an accrual extract.
- H. Run/preview an accrual report.
- I. Finalize and print an accrual report for submission to the host agency or forest.
- J. Export an accrual report in PDF format.
- K. Explain when AD Drawn Down occurs.

II. ACCRUAL CATEGORIES

THE INSTRUCTOR SHOULD OBTAIN A COPY OF THE CURRENT INCIDENT ACCRUAL MATRIX TO PROVIDE STUDENTS WITH UP-TO-DATE INFORMATION.

A. Review US Forest Service accruals.

1. The US Forest Service requires all incidents utilizing Forest Service resources to report their accruals on a daily basis. The assignment of an accrual category for resources is automated – processed when a new resource is entered into an I-Suite database. However, a Cost user will be responsible for verifying and managing the assignment of accrual categories.

NOTE: Providing a **Daily Accrual Summary Report** to a Host Forest or the National Forest Service Payment Center Is A **Requirement**.

B. Identify reportable US Forest Service accrual categories.

1. Sixty separate accrual categories are available to Cost users, but only the following fifty-nine accrual categories are reportable:
 - a. **AD:** Casual hires
 - b. **AMD:** Aviation Management Directorate aircraft
 - c. **CONT:** All non-air contracts
 - d. **INTL:** International
 - e. **NOAA:** National Weather Service personnel
 - f. **States:** All fifty states, plus District of Columbia, Guam, Puerto Rico and the Virgin Islands.

C. Discuss the logic/criteria for each reportable accrual category.

1. Extract data is captured into the following fifty-nine categories by accounting code:

- a. **AD:** Casual hires
- b. **AMD:** Aviation Management Directorate aircraft
- c. **CONT:** All non-air contracts
- d. **INTL:** International
- e. **NOAA:** National Weather Service personnel
- f. **States:** All fifty states, plus District of Columbia, Guam, Puerto Rico and the Virgin Islands.

NOTE: The Incident Jurisdiction defined for an Incident in Data Admin facilitates cost accrual category decisions.

NOTE: Accrual categories refer to a specific RC line number in the FS financial system. This line number displays on the Accrual Summary report.

2. The EXCL (Exclude) accrual category is not included in the extract.

D. Identify the Accrual Fiscal Year:

1. The two digit Fiscal Year is appended to the accounting code for accruals in the Accrual Summary Report, Detail Report and Financial Export.

NOTE: Accrual Reports will not include totals by Fiscal Year. They only include totals by the accrual accounting code with the Fiscal Year appended to the accounting code.

NOTE: If the user manually typed the Fiscal Year at the end of the accounting code, the Fiscal Year will be shown twice. (e.g., if PBM32408 was typed into I-Suite, it will display as PBM3240708 for the 2008 Fiscal Year and PBM32400709 for the 2009 Fiscal Year.)

- a. The new Fiscal Year starts on October 1 each year.
- b. Accruals start at \$0.00 at the start of the new Fiscal Year.
- c. Incidents being managed in only one Fiscal Year will include financial data for just that Fiscal Year.
- d. Incidents that span more than one Fiscal Year will have two accrual accounting codes, one for each Fiscal Year. The accounting code with the new Fiscal Year appended will only be created when there are costs associated with that accounting code in the new Fiscal Year.
- e. The OF-288 and OF-286 invoices will not show the appended Fiscal Year with the accounting code.
- f. Changes that were made to financial data in the previous Fiscal Year do not effect the new Fiscal Year accrual data. Those changes are included in the previous Fiscal Year's accrual data.

III. ACCRUAL ACCOUNTING CODES

A. To add or edit an Accounting Code for Accruals:

1. Open **Data Admin**. Make sure the **Incident Data** tab is selected.
2. Under **Feature**, click to select **Accounting Codes**.
3. To add an **Accounting Code**, click the **Add** button.
4. From the **Incident Name** drop down list, select the appropriate **Incident Name**.
5. From the **Agency** drop-down list, select the appropriate agency.

NOTE: You must select an **Agency** before entering an accounting code. The **Accounting Code** box is disabled until you selected an **Agency**.

6. In the **Accounting Code** box, enter the new **Accounting Code**.
7. If you selected the **FS Agency**, a **Region / Unit** drop-down list is available. Select the appropriate region or unit code from this drop-down.
8. To save your changes, click the **Save** button.
9. When finished, click the **Close** button.

B. To assign an Accrual Override Code to incident resources.

1. Open **Data Admin**. Make sure the **Incident Data** tab is selected.
2. Under **Feature**, click to select **Accounting Codes**.
3. In the **Accounting Codes** grid, click to select the **Accounting Code** to which you want to assign an accrual override code.
4. From the **Accrual Override Code** drop-down list, select the **Accrual Override Code** you want to assign to the accounting code.
5. To save your changes, click the **Save** button.
6. When finished, click the **Close** button.

IV. ACCRUAL EXTRACT

NOTE: Once Resources have been assigned an Accrual Code, you can run an extract to capture Accrual Amounts assigned to each Category.

A. To create an accrual extract.

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Accrual**.
3. On the **Accrual Extract** window, click the **Extract** button.

NOTE: You must print the report to fax to the Host Agency. For this exercise, you will not be able to actually print an Accrual Report.

B. To run and preview an accrual report:

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Accrual** to open the **Accrual Extract** window.
3. Under **Accrual Extract**, click to select the current accrual extract.
4. Under **Reports**, click to select one of the following:
 - a. Summary
 - b. Detail
 - c. Detail All
5. To preview your selected report, click the **Preview** button.
6. Review the **Accrual Report** in the **Preview** window. Then click the **Close** button.

NOTE: The **Detail Report** is a valuable tool that can be used to validate the accuracy of the **Accrual Report**. You should review this report prior to finalizing the **Daily Accruals**.

C. To finalize and print an accrual report for submission to the host agency or forest:

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Accrual** to open the **Accrual Extract** window.
3. Under **Accrual Extract**, click to select the current accrual extract.
4. Click the **Finalize** button, and then click the **OK** button.

NOTE: A sequential number is posted to each accrual after it is Finalized (e.g. 0001).

5. Under **Reports**, click to select the appropriate report, and then click the **Print** button.

NOTE: Instead of faxing, reports can be exported in a PDF format and then e-mailed or posted to a Website.

D. To export a report in PDF format.

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Accrual** to open the **Accrual Extract** window.
3. Under **Accrual Extract**, click to select the current accrual extract.
4. Under **Reports**, click to select a report. Then click the **Preview** button.
5. On the **Accrual** window in **Crystal Reports**, click the **Export** button to open the **Export** window.
6. From the **Format** drop down list select **Acrobat Format (PDF)**.
7. From the **Destination** drop down list select the appropriate file destination. Then click the **OK** button. An **Export Options** window displays.
8. To include all pages of the report in the export process, click the **All** option. To include a range of pages in the export, click the **Page Range** option. Then define the page

range in the **From** and **To** boxes.

9. Click the **OK** button to export the report. A **Choose Export File** window displays.
10. From the **Save in** drop-down list, select the directory where you want to save the PDF file.
11. Enter the **File name** to assign to the PDF file.
12. Click the **Save** button to export the file.

V. AD DRAW DOWN

A. For an AD Drawn Down to occur, the following must happen:

1. The person must have an accrual code of AD. (Usually an employment type of AD and an agency of FS.)
2. An Original OF-288 must be printed.
3. After the OF-288 is printed, accruals must be extracted and finalized.
4. After accruals are extracted and finalized, a Financial Export file must be created.
5. After the Financial Export File is created, accruals must be extracted and finalized again. The AD Draw Down is included on these Accrual Reports.
6. After accruals have been extracted and finalized for the second time, another Financial Export File must be created. The AD Drawn Down will be included in this export file.

NOTE: Accruals can only be finalized once per day and the financial export can only be created once per day.

NOTE: AD Drawn Downs use the total invoiced amount prior to deductions shown in Block 22 on the Commissary Record for the OF-288 Invoice.

NOTE: The AD Draw Down is based on the last accounting code posted for each day.
Example:

- Day one \$100 posted on P1234 (AD Draw Down is on P1234 for \$100)

- Day two \$100 posted on P5678 (AD Draw Down is on P5678 for \$100)

- Day three in the morning has \$75 posted on P5678 and in the afternoon has \$25 posted on P1234 (AD Draw Down is on P1234 for \$100).

- a. The AD Draw Down will occur in the prior Fiscal Year when all of the postings and the AD Draw Down steps previously defined occur in the prior Fiscal Year.
- b. The AD Draw Down will occur in the new Fiscal Year when all of the postings and the AD Draw Down steps previously defined occur in the new Fiscal Year.

- c. The AD Draw Down will occur in the new Fiscal Year when the Original OF-288 invoice spans both Fiscal Years. When this occurs, the entire invoiced amount will be drawn down in the new Fiscal Year.

NOTE: If the AD Draw Down occurs in the new Fiscal Year because the Original OF-288 Invoice spans both Fiscal Years, it may result in a negative accrual amount.

- d. The AD Draw Down will occur in the new Fiscal Year when all postings were made in the prior Fiscal Year, but not all of the AD Draw Down steps previously defined were completed in the prior Fiscal Year.

NOTE: The AD Draw Down will only occur when another Original OF-288 invoice is printed for that resource in the new Fiscal Year and all of the AD Draw Down steps were completed in the new Fiscal Year. This may result in a negative accrual amount.

If another Original OF-288 invoice is not printed in the new Fiscal Year, the AD Draw Down may never occur in this situation.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	8.9 – Cost: Projections.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Define Cost projections.2. Create a projection.3. Edit a projection.4. Update a projection.5. Generate a projection graph.6. Generate a projection report.

I. COST PROJECTIONS

- A. Define Cost projections.
- B. Create a projection.
- C. Edit a projection.
- D. Update a projection.
- E. Generate a projection graph.
- F. Generate a projection report.

II. PROJECTIONS

NOTE: A Cost user may be asked by the Finance Section Chief, or other command staff, for a projection.

- A. Review Cost projections.

NOTE: Cost Projections are used to predict the estimated future cost of an incident and are necessary for a variety of management decisions. For example, you can use projections when updating the WFSA or determining the cost of a specific strategy.

1. Cost offers users a **Projection** module to select and manipulate data for generating customized projections. As a starting point for each projection, Cost uses the current day's count of equipment and direct personnel resources. Added to this is the support calculation as follows:

Current Day Total Support Costs		Future Day
Current Day Total Direct Personnel	X	<i>Direct</i> Personnel

2. You can use the **Update** function in the projection module in two ways.
 - a. To increase or decrease the number of days for a projection.
 - b. To apply current day's costs to a previous day's specifications.

NOTE: Projections use the current day's count of Resources **Plus** the calculated support cost. Take this into consideration when presenting a projection for decision making purposes.

- B. To create a projection:
 1. Open the **Cost** module.
 2. To ensure that your data is current, run the **Create Daily** process.
 3. From the **Cost** drop-down menu, select **Projections**.
 4. When the **Projections** window displays, the system automatically inserts the next day's date into the **Start Date** box. In most cases, you will want the projection to

begin the following day. If needed, you can change this entry.

5. From the **Incident** drop-down list, select the appropriate Incident.
6. In the **Days** box, type the number of days.
7. In the **Projection Name** box, type an appropriate **Projection Name**.
8. To save the **Projection**, click the **Save** button.

NOTE: Projections are never ‘hard and fast.’ They can be modified to reflect a wide variety of scenarios.

C. To edit a projection.

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Projections** to open the **Projections** window.
3. Under **Incident**, click to select the appropriate **Projection**.
4. Under **Summary of Projection Kinds**, click to select the appropriate **Kind**.
5. Under **Projection Detail for Selected Kind**, click to check the **Flow Down** checkbox.
6. Edit the **Projection Detail**.

NOTE: Changes can only be made to the Average Cost and Quantity information.

7. To save your changes to the **Projection**, click the **Save** button.

NOTE: Projections may need to be updated for a couple of different reasons:

- To change the number of days in a projection
- To adjust a previously created projection for the current day.

D. To update a projection.

1. Open the **Cost** module.
2. From the **Cost** drop-down, select **Projections** to open the **Projections** window.
3. Under **Incident**, click to select the appropriate **Projection**.
4. Click the **Update Projection w/ Current Day’s Costs** button.
5. In the **Change Projection Days** box, type **8**. Then click the **Run Update** button.

III. GRAPHS & REPORTS

NOTE: Cost users may want to generate a Projection Graph for presentation along with reports.

A. To generate a projection graph.

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Projections** to open the **Projections** window.
3. Under **Incident**, click to select the appropriate **Projection**.

4. Under **Graphs**, click to select **Cost by Date**.
5. Click the **Graph** button to display the selected graph.
6. Run the **Total Projection Cost** graph.

NOTE: Users may need to generate a Projection Report for management decision making purposes.

B. To generate a projection report.

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Projections** to open the **Projections** window.
3. Under **Incident**, click to select the appropriate **Projection**.
4. Under **Reports**, click to select one of following reports:
 - a. Projection
 - b. Weekly Projection
 - c. Total Costs.
5. To display your selected report, click the **Preview** button.
6. To print your selected report, click the **Print** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	8.10 – Cost: Cost Apportionment.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Define cost apportionment.2. Create and manage a division.3. Assign resources to a division.4. Generate cost share reports.

I. COST APPORTIONMENT

- A. Define cost apportionment.
- B. Create and manage a division.
- C. Assign resources to a division.
- D. Generate cost share reports.

II. COST SHARE REPORTING

- A. Review cost apportionment.

NOTE: Cost Apportionment is the process used to determine each agency's share of the Incident Costs.

1. Cost provides features to facilitate reporting cost figures for cost share agreements. This feature involves three distinct steps.
 - a. Creating cost divisions.
 - b. Assigning resources to a division.
 - c. Generating the cost sharing reports. To accurately report cost shares, you must create a separate division for each day of incident cost reporting.

NOTE: Cost does not provide a separate **Cost Share** module or menu. Rather, it utilizes the more generic features to accomplish Cost Share Reporting.

III. COST DIVISIONS

NOTE: The divisions in the Cost module are not necessarily the same as the operational divisions on an incident.

NOTE: The first step in **Cost Share Reporting** is to create new entries in the **Divisions** table.

- A. To create and manage a division:

1. Open the **Cost** module.
2. From the **Cost** drop-down menu, select **Divisions** to open the **Cost - Divisions** window.
3. From the **Incident** drop down list, select an **Incident**.
4. Under **Add Mode**, complete the following:
 - a. Division - A
 - b. Shift - D
 - c. Date - Use the start date of the incident.
 - d. Fed% - 50%
 - e. State% - 50%

f. Other% - 0%

5. To save your changes, click the **Save** button.
6. Repeat the previous steps to create two more divisions using different start dates and percentages.
7. When finished, click the **Close** button.

NOTE: The system will automatically create a daily entry for every division up to the current date.

IV. ASSIGN RESOURCE TO DIVISION

NOTE: The second step is to set **Division Assignments - By Resource, By Day**.

A. To assign resources to a division:

1. Open the **Cost** module.
2. Click the **Show Cost** button in the **Cost** toolbar.
3. In the **Resources** grid, select a resource.
4. In the **Manage Cost** grid, select the division specified in the handout (**A**) from the **Division** drop-down list.

NOTE: When you select a division for a Crew resource, a prompt displays asking whether you want to apply the division to all sub-resources for that date. Click the **Yes** button to apply the division to the sub-resources. Click the **No** button if you do not want to apply the division to the sub-resources.

5. To save your changes, click the **Save** button.
6. Select different resources and complete the previous steps. Assign resources to different divisions on various dates.

NOTE: Divisions only display in the drop-down list if there was an entry created for that day.

V. COST SHARE REPORTS

NOTE: The third step is to generate the **Cost Share Reports**.

A. To generate cost share reports:

1. Open the **Cost** module.
2. Click the **Reports** button to open the Cost Reports window.

OR

From the **Reports** drop-down menu, select **Cost Reports**.

3. Under **Report Categories**, click to select **Other Categories**. Then click to select **Cost Share** in the bottom box.

4. From the **Incident** drop-down list, select the **Incident**.
5. Under **Cost Share Reports**, click to select **By Shift and Kind**. Then click the **Preview** button.
6. Preview other **Cost Share** reports of your choice.
7. When finished, click the **Close** button.

NOTE: The Cost Share report provides a summary of all the divisions and averages the daily percentages to determine the total percentages for Federal, State, and Other. The Division report provides information for a specific division.



UNIT 9

I-Suite Custom Reports

7/12/2013

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I-Suite Custom Reports

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STUDENT MANUAL

COURSE:	I-Suite
UNIT:	9.0 – Custom Reports: Overview.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the purpose of Custom Reports.2. Identify the basic features of the Custom Reports screen.

I. CUSTOM REPORTS

A. Identify the purpose of Custom Reports.

1. The purpose of Custom Reports is to use I-Suite data to create reports that are not available in the Standard Reports.

NOTE: All custom reports can be viewed and printed by other I-Suite users with the same rights.

NOTE: Only the original report creator can make changes to a report they created. Only the original report creator or an administrator can delete saved reports.

II. BASIC FEATURES

A. Identify the basic features of the Custom Reports window.

1. **Report Designer** - Create a custom report by selecting fields from a Data View and adding them to the report.
2. **Advanced Designer** - Create a custom report by constructing a valid SQL statement.

NOTE: With both designers you can save your Custom Reports.

NOTE: The data views that are available in both designers are based on the **Rights** associated with your **User ID**.

3. **Manage Saved Reports** - Print, preview, edit, delete, export and import saved Custom Reports.

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 9.1 – Custom Reports: Report Designer.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Design Custom Reports using Report Designer.
 2. Preview and Print from Report Designer.

I. REPORT DESIGNER

- A. Design Custom Reports using Report Designer.
- B. Preview and print from Report Designer.

II. DESIGN CUSTOM REPORTS

- A. To design Custom Reports using Report Designer:

1. From the **Reports** drop-down menu, select **Custom Reports**. On the Custom Reports window, click the **Report Designer** tab.
2. From the **Data Views** drop down list, select the **Report Views** you want to use.

NOTE: If a report was created for the selected Report View, a message displays asking whether you want to clear the designer and create a new report. Click **Yes** to create a new report. Click **No** if you want to edit the current report, not create a new one.

3. Click one or more fields under **Field Names** to highlight them. Then click the **>>** button to move the fields to **Selected Report Fields**. The fields you select print on the custom report. Repeat this step until all of the fields you want to include in the report are listed under **Selected Report Fields**.
4. If you need to rearrange the order in which the fields print on the report, highlight the field you want to move under **Selected Report Fields**. Then click the **Up** or **Down** button to move the field.
5. To change the column heading on the report, enter the name in the **Display Caption** field.
6. To change the width of a column in the report, enter the new width in the **Width** field.
7. To change the sort order for a column to either **Ascending** or **Descending**, select either **ASC** or **DESC** from the **Sort** drop-down list.
8. To add an aggregate to a column, select the appropriate option from the **Aggregate** drop-down list.
9. Under **Report Layout**, enter a **Report Title** for the custom report.

NOTE: The **Report Title** is used to store and retrieve the report. It must be unique. If there is a custom report that contains the same name, a message displays indicating that a report was already created with that title when you save the report. You must then enter a different title for the report before saving it.

10. If you want the report to print in a **Landscape** format, click to check the **Landscape** checkbox. If you want the report to print in a **Portrait** format, remove the check from the **Landscape** checkbox.
11. Click one of the following to identify the line spacing to use in the report:
 - a. Single

- b. 1.5 Lines
- c. Double.

12. When finished, click the **Save** button to save your **Custom Report**.

NOTE: Saved Custom Reports are listed under **Manage Saved Reports** from where they can be Printed, Edited, Deleted, Copied, Exported, or Imported, as needed.

B. Preview and print the report in Report Designer.

1. To preview and print your report, click the **Preview** button, and then click the **Print Report** button on the **Preview** screen.
2. To print your report without previewing, click the **Print** button on the **Custom Reports** screen.

NOTE: You can **Preview** and **Print** your report before or after you save it. You do not have to save your report.

NOTE: If you intend to save your report, it is a good practice to save it before you preview it.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	9.2 – Custom Reports: Advanced Designer.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Design Custom Reports using Advanced Designer.2. Preview and Print from Advanced Designer.3. Define components of a valid SQL statement.

I. ADVANCED DESIGNER

- A. Design Custom Reports using Advanced Designer.
- B. Preview and Print from Advanced Designer.
- C. Define components of a valid SQL statement.

II. DESIGN CUSTOM REPORTS

- A. Design Custom Reports using Advanced Designer.
 - 1. Open **Custom Reports**. Then click the **Advanced Designer** tab.
 - 2. Under **Report Layout**, enter a **Report Title** for your report.

NOTE: The **Report Title** is used to store and retrieve the report. It must be unique. If there is a custom report that contains the same name, a message displays indicating that a report was already created with that title when you save the report. You must then enter a different title for the report before saving it.

- 1. If you want the report to print in a **Landscape** format, click to check the **Landscape** checkbox. If you want the report to print in a **Portrait** format, remove the check from the **Landscape** checkbox.
- 2. Click one of the following under **Report Layout** to identify the line spacing to use in the report:
 - a. Single
 - b. 1.5 Lines
 - c. Double.
- 5. Under **Report Views**, double-click a listed table to display a list of fields for that table. Double click a field to added it to the **SQL Statement**.
- 6. Under **SQL Statement**, construct a valid SQL statement. Then click the **Check** button to check the validity of the statement and move the **SQL Statement** to **Selected Report Fields**.

NOTE: If a SQL statement is invalid, a message displays in the **Error Messages** box. Correct the error in the SQL statement and then click the **Check** button again.

NOTE: The **Error Messages** box under **Advanced Designer** can also be used to validate **Report Designer** reports.

- 6. If you want to define a width for the field, rather than having the application automatically assign a width, enter the width into the **Width** field under **Selected Report Fields**.
- 7. When finished, click the **Save** button to save your **Custom Report**.

NOTE: Saved Custom Reports are listed under **Manage Saved Reports** from where they can

be Printed, Edited, Deleted, or Exported, as needed.

B. Preview and print from Advanced Designer.

1. To preview and print your report, click the **Preview** button, and then click the **Print Report** button on the **Preview** screen.
2. To print your report without previewing, click the **Print** button on the **Custom Reports** screen.

NOTE: You can **Preview** and **Print** your report before or after you save it. You do not have to save your report.

C. Review components of a valid SQL statement.

1. Data retrieval operations (queries) search the database, retrieve information that you have requested in the most efficient way possible, and display it. The following is a list of some of the Keywords used in SQL statements:
 - a. **SELECT** clause – identifies the data.
 - b. **FROM** clause – identifies the table.
 - c. **WHERE** clause – limits the data that the **SELECT** statement returns.
 - d. **GROUP BY** – organizes data into sets e. **COUNT(*)** – gives a summary value per set (e.g.: 209 Resource List).
2. The following is a list of some best practices to follow when constructing SQL statements:
 - a. **KEYWORDS** – in uppercase.
 - b. All other words – in lowercase.
 - c. Clauses – each clause on a separate line.
 - d. Complex **WHERE** clause – can be separated onto multiple lines.
 - e. **Minimum requirement** – a valid SQL statement must have at least a **SELECT** and a **FROM** clause.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	9.3 – Custom Reports: Manage Saved Reports
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Preview/Print saved custom reports.2. Edit saved custom reports.3. Copy saved custom reports.4. Delete saved custom reports.5. Export saved custom reports.6. Import saved custom reports.

I. MANAGE SAVED REPORTS

- A. Preview/Print saved custom reports.
- B. Edit saved custom reports.
- C. Copy saved custom reports.
- D. Delete saved custom reports.
- E. Export saved custom reports.
- F. Import saved custom reports.

II. PREVIEW/PRINT CUSTOM REPORTS

- A. To preview or print saved custom reports:

1. Open **Custom Reports**. Then click the **Manage Saved Reports** tab.
2. Under **Filters**, click to check or uncheck the following checkboxes to identify the reports to include in the **Saved Reports** grid:
 - **My Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports that you created.
 - **User Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports created by users with the same rights as you.
3. Under **Saved Reports**, click to select the report you want to preview or print.
4. Click the **Preview** button to preview the report. Click the **Print** button to print the report.

III. EDIT CUSTOM REPORTS

NOTE: Only the user who originally created the report can make changes to it.

- A. To edit saved custom reports.

1. Open **Custom Reports**. Then click the **Manage Saved Reports** tab.
2. Under **Filters**, click to check **My Reports**. Uncheck **User Reports**.

NOTE: By unchecking **User Reports**, only those reports you can edit will display in the **Saved Reports** grid.

3. Under **Saved Reports**, click to select the report you want to edit. Then click the **Edit** button.
4. Edit the report, as needed. Then click the **Save** button.

IV. COPY CUSTOM REPORTS

NOTE: Users that did not create the original custom report can still copy it to create a new

report.

A. To copy a saved custom report:

1. Open **Custom Reports**. Then click the **Manage Saved Reports** tab.
2. Under **Filters**, click to check or uncheck the following checkboxes to identify the reports to include in the **Saved Reports** grid:
 - **My Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports that you created.
 - **User Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports created by users with the same rights as you.
3. Under **Saved Reports**, click to select the report you want to copy.
4. Click the **Copy** button.
5. If the report was created in the **Report Designer**, that tab automatically opens. If the report was created in the **Advanced Report Designer**, that tab automatically opens.
6. Make the appropriate changes to the copied report.
7. In the **Report Title** box, enter a unique title for the report.
8. Click the **Save** button to save the report.

V. DELETE CUSTOM REPORTS

NOTE: Only the user who originally created the report or an administrator can delete it.

A. To delete saved custom reports:

1. Open **Custom Reports**. Then click the **Manage Saved Reports** tab.
2. Under **Filters**, click to check **My reports**. Uncheck **User Reports**.

NOTE: By unchecking **User Reports**, only those reports you can delete will display in the **Saved Reports** grid.

3. Under **Saved Reports**, click the report you want to delete. Then click the **Delete** button.
4. When the delete confirmation message displays, click **Yes** to confirm deletion of the custom report.

VI. EXPORT/IMPORT CUSTOM REPORTS

A. To export saved custom reports:

1. Open **Custom Reports**. Then click the **Manage Saved Reports** tab.
2. Under **Filters**, click to check or uncheck the following checkboxes to identify the reports to include in the **Saved Reports** grid:
 - **My Reports** - When this checkbox is checked, the **Saved Reports** grid

includes all of the custom reports that you created.

- **User Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports created by users with the same rights as you.

3. Under **Saved Reports**, click the report you want to export. Then click the **Export** button.
4. On the **I-Suite Custom Reports Export** window, browse to the folder where you want to save the exported report. Then click the **Save** button.

B. To import saved custom reports.

1. Open **Custom Reports**. Then click the **Manage Saved Reports** tab.
2. Under **Saved Reports**, click the **Import** button.
3. On the **I-Suite Custom Reports Import** window, browse to the location of the saved custom report. Click to select the report you want to import. Then click the **Open** button.



UNIT 10

I-Suite Supply

7/12/2013

This Training Manual is for use with the 13.01.00 version of the I-Suite System.

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STUDENT MANUAL

COURSE:

I-Suite

UNIT:

10.0 - Supply Overview

OBJECTIVES:

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

1. Identify the purpose of the Supply module.
2. Identify the basic features of the Supply screen.

I. SUPPLY

A. Identify the purpose of the Supply Module:

1. The primary purpose of the Supply module is to track supply items that are issued to resources and returned to Supply.
2. The Supply module can also be used to track the Supply Inventory.

NOTE: Inventory Tracking is optional. When using the Supply module to track the **Supply Inventory**, it is a good idea to receive supply items in order to ensure accurate counts.

B. Identify the basic features of the Supply window:

1. The **Supply** drop-down menu at the top of the window includes the following **Supply** options:
 - a. **Release (Permanent)** - Permanently releases supply items to another location, such as a cache or another incident.
 - b. **Add/Edit Location** - Adds or edits a location.
 - c. **Add/Edit Supply Items** - Adds or edits a Supply item.
 - d. **Transfer (At Incident)** - Transfers a Supply item from one resource to another.
 - e. **Inventory** - Allows the user to manually change inventory counts.
2. The **Supply** toolbar is located to the right of the **Filter** toolbar. The buttons in this toolbar include:
 - a. **Issue** - Issue supply items.
 - b. **Issue Returns** - Return supplies issued to a resource or location.
 - c. **Receive** - Receive supply items.
 - d. **View History** - View a history of supply items that were issued.
 - e. **Add/Edit Location** - Add or edit locations that are either internal or external to the incident.
 - f. **Add Supply Item** - Add items to the Supply list.
3. Each window in the Supply module contains two to three grid areas. The following grids may display on the screen, depending on the Supply area that is open:
 - a. Resources Grid
 - b. Locations Grid
 - c. Supply Items Grid
 - d. Items for Transfer Grid
 - e. Items Issued Grid

- f. Items Received Grid
- g. Items Released Grid
- h. Items Transferred Grid

4. Additional Supply buttons display on the right side of the window. The buttons that display are based on the area that is open within the Supply module.

STUDENT MANUAL

COURSE:

I-Suite

UNIT:

10.1 - Supply Options

OBJECTIVES

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

1. Select the incident to which the Supply option apply.
2. Define the Supply Address.
3. Turn Inventory Tracking ON or OFF.

I. SUPPLY OPTIONS

- A. Define Incident for Supply
- B. Define Supply Address
- C. Turn Track Inventory On or Off

II. SUPPLY INCIDENT

A. To define the Supply Incident:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
2. Click the **Supply** tab.
3. From the **Incident** drop-down list, select the incident to which the supply options apply.
4. When finished, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

III. SUPPLY ADDRESS

A. To define the Supply Address:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
2. Click the **Supply** tab.
3. Under **Supply Address**, enter the supply address, including **Address 1**, **Address 2**, **City**, **State**, and **Zip Code**.
4. When finished, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

IV. TRACK INVENTORY

A. To turn Track Inventory ON or OFF:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
2. Click the **Supply** Tab.
3. If you want to track the supply inventory, click to check the **Track Inventory** checkbox.

If Track Inventory is ON and you want to turn it OFF, click to uncheck the **Track Inventory** checkbox.

4. When finished, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	10.2 - Supply Issue
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify Supply Items to issue to a Resource or Location.2. Perform an Advanced Search for a Supply Item.3. Remove or Change the Quantity for a Supply Item.

I. ISSUE SUPPLIES

- A. Issue Supply Items to a Resource or Location.
- B. Perform an Advanced Search for a Supply Item.
- C. Remove or Change the Quantity for a Supply Item.

II. ISSUE SUPPLY ITEMS

A. To use the **Select Item** button to select Supplies to issue to a Resource or Location:

1. From the **Modules** drop-down menu select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. To issue a Supply Item to a resource, click the **Resource** in the **Resources** grid.

OR

To issue a Supply Item to a resource and a location, click a **Resource** in the **Resources** grid. Then select the location from the **Location** drop-down list.

OR

To issue a Supply Item to a location, click the **UnSelect Resource** button. Then select the location from the **Location** drop-down list.

NOTE: If your team is part of the **Supply Pilot**, you can scan a resource's incident card to select that resource when issuing supplies.

3. In the **Items for Issue** grid, click the **Supply Item** you want to issue to the Resource or Location.
4. Click the **Select Item** button.
5. When the **Issue Item(s)** window displays, enter the quantity of the items being issued in the **Quantity to Issue** box.
6. Click the **Save** button. The item displays in the **Items Issued** grid at the bottom of the window.
7. To add another supply item to the **Items Issued** grid, repeat steps 3 - 6.

NOTE: You can only issue items to one **Resource** or **Location** at a time.

NOTE: If your team is part of the **Supply Pilot**, you can scan either the bar code for the item in the **Smart Book** or the **NFES Bar Code** on the item. When you scan the bar code, the system automatically displays the item in the **Items Issued** grid on the screen. If there are multiple quantities you are issuing, scan the bar code multiple times to increase the quantity

amount.

8. When all items to be issued to the resource or location are in the **Items Issued** grid, click the **Save Item(s)** button to issue the items.

NOTE: If one or more of the items had a **Property Number** defined, a **Waybill** for the item displays in a **Preview** window. Click the **Print Report** button to print the Waybill. If the **Waybill** does not display, click the **Preview/Print Waybill** button.

B. To use the **Quick Issue** button to issue Supply Items:

1. From the **Modules** drop-down menu select the **Supply** option

OR

Click the **Supply** button in the **Main** toolbar.

2. Select the **Resource** or **Location to Issue To**.
3. Click the **Quick Issue** button to open the Quick Issue Item(s) window.
4. In the **NFES # to Issue** box, enter the appropriate **NFES** number.
5. If you are issuing more than one supply item with the same **NFES** number, click to check the **Do not clear NFES #** checkbox. This leaves the **NFES** number in the **NFES#** box after you click the **Save** button.
6. If applicable, select a property number for the item from the **Property Number** drop-down list.
7. Enter the **Quantity to Issue**.

NOTE: If you selected a **Property Number**, the **Quantity to Issue** can only be **1**.

8. Enter any comments about the item being issued in the **Remarks** box.
9. Click the **Save** button to save the items to the **Item Issued** grid.

NOTE: The **Quick Issue Item(s)** window remains open after you save the new item count. This enables you to quickly issue another item.

10. To enter additional items, repeat the steps 4 - 9.
11. After all of the items have been added to the **Item Issued** grid, click the **Cancel** button, to close the **Quick Issue Item(s)** window.
12. To finish issuing, click the **Save Item(s)** button next to the **Items Issued** grid.

III. ADVANCED SEARCH

A. To perform an Advanced Search in the Supply Items grid:

1. In the **Advanced Search** box on the right side of the window, enter the term for which you want to search.
2. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in either the name or the description. For example, if you entered **AXE**

as your search term, only those items with AXE in the name or description would display in the grid.

3. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

IV. REMOVE/CHANGE ISSUE

A. To remove or change the quantity of an item on the **Items Issued** grid:

1. In the **Items Issued** grid, click to select the item you want to remove or change.
2. Then click the **Remove/Change Issue** button. A **Remove Item(s)** window displays.
3. In the **Correct quantity to Issue** box, enter the quantity of the item to issue.

NOTE: To remove the item from the **Item Issued** grid, enter **0** (zero) in the **Correct quantity to Issue** box.

4. Click the **Save** button to change the quantity or remove the item.

NOTE: To remove all items from the Items Issued grid, click the **Clear Issue** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	10.3 - Supply Issue Returns
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Filter Supply Items that are Listed2. Perform an Advanced Search3. Return Supply Items

I. ISSUE RETURNS

- A. Filter listed Supply Items.
- B. Perform an Advanced Search
- C. Return Supply Items

II. FILTER SUPPLY ITEMS

- A. To identify the Supply Items to display in the Items Issued grid:
 - 1. To display items issued to a location only, click the **List Items For All Locations Without A Resource** button.
 - 2. To display items issued to a specific resource, click a resource in the **Resources** grid at the top of the window.

NOTE: If your team is part of the Supply Pilot, you can scan a resource's incident card to select that resource when returning supplies.

- 3. To display items issued to a specific location, select the location from the **Location** drop-down list.
 - 4. To display items currently issued to a resource, location, or both, click the **All Items Issued** button.

NOTE: The **All Items Issued** button displays all items currently issued.

- 4. To display all supply items regardless of whether they were issued, click the **Return by Item** button.

NOTE: Use the **Return by Item** feature to return items that may not have been issued using I-Suite.

III. ADVANCED SEARCH

- A. To perform an Advanced Search in the Items Issued grid:
 - 1. Select a location from the **Location** drop-down list.

NOTE: The **Advanced Search** option searches for a supply item issued to the location selected in the **Location** box, regardless of the other filters selected. A location must be selected to perform an **Advanced Search in Issue Returns**. If the item you want to find was not issued to a location, select the **Blank** location option.

- 2. In the **Advanced Search** box on the right side of the window, enter the term for which you want to search.
 - 3. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in either the name or the description. For example, if you entered AXE as your search term, only those items with AXE in the name or description would display in the grid.

4. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

IV. RETURN SUPPLY ITEMS

NOTE: You can print an **Items Issued Report** from the **Return Item** window. This report can help you quickly identify the items you need to return.

A. To use the **Return Items** button to return a Supply Item:

1. Click the item being returned in the **Items Issued** grid.
2. Click the **Return Items** button to open the **Return Item** window.
3. In the first box, enter the total quantity , then select **READY FOR ISSUE** or **NOT READY FOR ISSUE** from the drop-down list.
4. In the second box, enter the total quantity, then select **READY FOR ISSUE** or **NOT READY FOR ISSUE** from the drop-down list.
5. Click the **Save** button to return the item.

NOTE: If your team is part of the Supply Pilot, you can scan either the bar code in the Smart Book or the NFES bar code on the item to initiate the return process for that item. When you scan the bar code, the **Return Item** window opens with that item selected. Follow instructions 3 - 5 to complete the return.

B. To use the **Return By Property #** button to return a Supply Item:

1. Click the **Return by Property #** button.
2. From the **Property Number** drop-down list, select the Property Number for the item being returned.
3. If the item being returned is ready for issue, click the **Ready For Issue** option. If the item is not ready for issue, click the **Not Ready For Issue** option.

STUDENT MANUAL

COURSE:

I-Suite

UNIT:

10.4 - Transfer Supply Items

OBJECTIVES:

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

1. Transfer selected items from one Resource or Location to another.
2. Perform an Advanced Search.
3. Remove Transfer Items from Items Transferred List before transferring.

I. TRANSFER SUPPLY ITEMS

- A. Transfer Supplies
- B. Advanced Search
- C. Remove Transfer Items

II. TRANSFER SUPPLIES

A. To transfer supplies from one resource or location to another:

1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. From the **Supply** drop-down menu, select the **Transfer (At Incident)** option.
3. To transfer a supply item to a resource, click the resource in the **Issue To** grid.

OR

To transfer the supply item to a resource and a location, click the resource in the **Issue To** grid and select the location from the **Location** drop-down list.

OR

To transfer the supply item to a location, click the **UnSelect Resource** button. Then select the location from the **Location** drop-down list.

4. In the **Items for Transfer** grid, click the item that is being transferred.

NOTE: Only items that are **Trackable** and **Issued** to a resource are listed in the **Item Name** grid. **Trackable** items are those supply items with a **Property Number** defined. **Property Numbers** can be defined when the supply item is **Added, Received** or **Issued**.

5. Click the **Select Item** button to open the **Transfer Item** window.

6. In the **Remarks** area, type any remarks concerning the transfer.

NOTE: You can only enter **Remarks** on the **Transfer Item** window. The name of the item and the quantity being transferred are automatically defined, based on the information specified when it was initially issued.

7. Click the **Save** button to save the transfer item to the **Item Transferred** grid.

8. If there are multiple items being transferred to the selected person, repeat steps 4 - 7 for each item.

9. Click the **Transfer Item(s)** button to transfer the item(s) listed in the **Items Transferred** grid to the selected resource or location.

10. When the **Waybill** displays in the **Preview** window, click the **Print Report** button to print the Waybill.

11. When the **Print** window displays, click the **Print** button to print the **Waybill**.

III. ADVANCED SEARCH

A. To perform an Advanced Search for a Supply Item in the Items for Transfer grid:

1. In the **Advanced Search** box on the right side of the Supply Transfer window, enter the term for which you want to search.

2. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in either the name or the description. For example, if you entered AXE as your search term, only those items with AXE in the name or description would display in the grid.

3. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

IV. REMOVE TRANSFER ITEMS

A. To remove an item from the **Items Transferred** grid:

1. Click the item you want to remove in the **Items Transferred** grid.

2. Click the **Remove Item** button to open the **Transfer Item** window.

3. Enter any applicable remarks in the **Remarks** box, and click the **Save** button. The item is removed from the Items Transferred grid.

STUDENT MANUAL

COURSE:

I-Suite

UNIT:

10.5 - Release Supply Items

OBJECTIVES

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

1. Filter supply items in the Items for Release grid.
2. Permanently release supply items to an outside location.
3. Perform an Advanced Search.
4. Remove or change the Quantity for an item in the Items Released grid.

I. RELEASE SUPPLY ITEMS

- A. Filter Supplies listed in Items for Release grid.
- B. Permanently release supply items.
- C. Advanced Search.
- D. Remove/Change Release Items.

II. FILTER SUPPLY ITEMS

- A. Use the filter buttons at the top of the window to filter the **Items for Release** grid based on the following:
 - 1. To list all supply items, click the **All** button.
 - 2. To list only those supply items without an NFES number, click the **Non NFES** button.
 - 3. To list only those supply items with an NFES number, click the **Only NFES** button.
 - 4. To list only accountable supply items, click the **Account** button.
- B. Use the options listed under **Show Items** to filter the **Items for Release** grid based on the following:
 - 1. To list all supply items, regardless of the incident selected, click the **All** option under **Show Items**.
 - 2. To list only those supply items for the incident, click the **Only at Incident** option under **Show Items**.

III. PERMANENTLY RELEASE SUPPLIES

- A. To use the **Select Item** button to permanently release supply items to an outside location:
 - 1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

- 2. From the **Supply** drop-down menu, select the **Release (Permanent)** option.
- 3. In the **Location** grid at the top of the window, click to select the **Location** to which items will be released.
- 4. In the **Items for Release** grid, click to select the **Supply Item** to release.
- 5. Click the **Select Item** button to open the **Release Items** window.
- 6. In the **Enter Quantity** box, type the total quantity to release.
- 7. In the **Remarks** box, type any applicable remarks.
- 8. Click the **Save** button to save the release information.
- 9. Repeat steps 4 - 8 for each item being released to the selected location.

NOTE: If your team is part of the Supply Pilot, you can scan either the bar code in the Smart Book for the item you are releasing or the NFES bar code on the item. When you scan the bar code, the system automatically displays the item in the **Items Released** grid.

8. In the **ETD** box, enter the **Estimated Time of Departure**, if applicable.
 9. In the **ETA** box, enter the **Estimated Time of Arrival**, if applicable.
 10. Click the **Save Items** button to release those items listed in the **Items Released** grid to the selected location. The **Waybill** opens in the **Preview** window. If it does not, click the **Preview/Print WayBill** button.
 11. When the **Print** window opens, select the printer where you want to send the **Waybill**. Then click the **Print** button.
- B. To use the **Quick Release** button to permanently release supply items to an outside location:
1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. From the **Supply** drop-down menu, select the **Release (Permanent)** option.
3. In the **Location** grid, click the location to which you are releasing the items.
4. Click the **Quick Release** button to open the **Quick Release Item(s)** window.
5. In the **NFES # to Release** box, enter the appropriate NFES number.
6. If you are issuing more than one supply item with the same NFES number, click to check the **Do not clear NFES #** checkbox. This leaves the NFES number in the **NFES#** box after you click the **Save** button.
7. If applicable, select a property number for the item from the **Property Number** drop-down list.
8. Enter the **Quantity to Release**.
9. Enter any comments about the item being issued in the **Remarks** box.
10. Click the **Save** button to save the items to the **Items Released** grid.

NOTE: The **Quick Release Item(s)** window remains open after you save the new item count. This enables you to quickly add another release item.

11. To enter additional items, repeat the steps 5 - 10.
12. After all of the items have been added to the **Item Issued** grid, click the **Cancel** button, to close the **Quick Release Item(s)** window.
13. In the boxes above the **Items Released** grid, enter the **ETD** (Estimated Time of Departure) and the **ETA** (Estimated Time of Arrival).
14. To finish the release process, click the **Save Item(s)** button next to the **Items**

Released grid.

IV. ADVANCED SEARCH

A. To perform an Advanced Search in the Items for Release grid:

1. In the **Advanced Search** box on the right side of the window, enter the term for which you want to search.
2. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in either the name or the description. For example, if you entered AXE as your search term, only those items with AXE in the name or description would display in the grid.
3. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

V. REMOVE/CHANGE RELEASE ITEMS

A. To remove or change the quantity of an item listed in the Items Released grid:

1. In the **Items Released** grid, click to select the incorrect item.
2. Click the **Remove/Change Release** button to open the **Release Item(s)** window.
3. In the **Enter quantity to Release** box, enter the quantity of the item to release.

NOTE: To remove the item from the **Items Released** grid, enter **0** (zero) in the **Enter quantity to Release** box.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	10.6 - Add/Edit Supply Items
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Add Supply Items2. Edit Supply Items

I. ADD/EDIT SUPPLIES

A. Add Supplies

B. Edit Supplies

II. ADD SUPPLIES

A. To add Supply Items:

1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. Click the **Add Supply Item** button in the **Supply** toolbar.

3. On the **Supply - Add Supply Item** window, click the **Add** button.

4. In the **Name** box, type the name of the supply item. This information is required.

5. In the **Description** box, type a description of the supply item. This information is required.

6. In the **NFES #** box, type the **National Fire Equipment System** (NFES) number for the item.

7. From the **Category** drop-down list, identify whether the item is **Consumable**, **Durable** or **Trackable**.

8. If applicable, type the property number assigned to the item in the **Property #** box.

9. From the **From Location** drop-down list, select the location where the item originated.

10. From the **Supply Catalog Access** drop-down list, select the departments who should have access to the item. The options include **Supply Only**, **Communications Only**, or **All**.

11. In the **Cost** box, type the cost of the item.

12. If the item is a rental, click to check the **Rental Item** checkbox.

13. In the **Qty On Hand** box, type the total number of the item currently available at the incident.

14. In the **ReOrder Qty** box, type the quantity at which the item should be re-ordered.

15. From the **Qty Per Container** drop-down list, select the total quantity included in each container for the item.

16. From the **Unit of Issue** drop-down list, select the unit at which the item is issued.

17. If the item is a hazardous material, select the hazard type from the **Hazardous** drop-down list.

18. Type the item's measurements in the **Weight-US (lbs)**, **Weight-Metric (kgs)**, or **Cubes (ft³)** box.
19. In the **Remarks** box, type any applicable remarks for the item.
20. To save the **Supply Item**, click the **Save** button.
21. When you have finished adding all of the appropriate items, click the **Close** button to close the **Supply - Add Supply Item** window.

III. EDIT SUPPLIES

A. To edit supply items:

1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. Click the **Add Supply Item** button in the **Supply** toolbar.
3. Click one of the following buttons to filter the **Supply Item** grid at the top of the window:
 - a. **All** - Displays all supply items.
 - b. **Non NFES** - Displays supply items without an NFES number.
 - c. **Only NFES** - Displays only supply items with an NFES number.
4. In the **Supply Item** grid at the top of the window, click to select the supply item you want to edit. The information for the item displays in the **Edit Supply Item** area at the bottom of the window.

NOTE: If your team is part of the **Supply Pilot**, you can scan either the bar code in the **Smart Book** for the item you are editing or the **NFES Bar Code** on the item. When you scan the bar code, the system automatically displays that supply item in the **Edit Supply Item** area at the bottom of the window.

5. If the Supply Item is one from the Supply Catalog, the only information you can change is the **Supply Catalog Access**.

If the Supply Item is one that is not from the Supply Catalog, you can change all data for the supply item.

6. To save your changes, click the **Save** button.
7. When you have finished editing all appropriate items, click the **Close** button to close the **Supply - Add Supply Item** window.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	10.7 - Add/Edit Locations
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Add Within Incident Locations.2. Edit Within Incident Locations.3. Add Outside Incident Locations.4. Edit Outside Incident Locations.

I. ADD/EDIT LOCATIONS

- A. Add Within Incident Locations
- B. Edit Within Incident Locations
- C. Add Outside Incident Locations
- D. Edit Outside Incident Locations

II. ADD WITHIN INCIDENT LOCATIONS

A. To add locations that are within the incident:

1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. Click the **Add/Edit Location Other** button in the **Supply** toolbar.
3. On the **Add Location/Other** window, click the **Within Incident** button, and then click the **Add** button.
4. In the **Location/Other Name** box, type the name of the location. The **Location Name** is required.
5. In the **Location Code** box, type the code to assign to the location. The **Location Code** is required.
6. In the **POC Name** box, type the name of the point -of-contact at the location.
7. In the **POC Phone #** box, type the telephone number for the point-of-contact.
8. In the **POC Email** box, type the e-mail address for the point-of-contact.
9. In the Latitude box, enter the location's latitude.
10. In the Longitude box, enter the location's longitude.
11. In the **Remarks** box, type any remarks applicable to the location.
12. Click the **Save** button to save the location.
13. Click the **Close** button to close the **Add Location/Other** window.

III. EDIT WITHIN INCIDENT LOCATIONS

A. To edit a location that is within the incident:

1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. Click the **Add/Edit Location Other** button in the **Supply** toolbar.
3. On the **Add Location/Other** window, click the **Within Incident** button.
4. Click the location you want to edit in the grid at the top of the window.
5. For inside locations that you added, you can change all of the location's information. For inside locations that are standard in the system, you can make changes to the following information:
 - a. POC Name
 - b. POC Phone #
 - c. POC Email
 - d. Latitude
 - e. Longitude
 - f. Remarks
6. Click the **Save** button to save your changes.
7. Click the **Close** button to close the **Add Location** window.

IV. ADD OUTSIDE INCIDENT LOCATION

A. To add a location that is outside of an incident:

1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. Click the **Add/Edit Location Other** button in the **Supply** toolbar.
3. On the **Add Location/Other** window, click the **Outside Incident** button, and then click the **Add** button.
4. In the **Location/Other Name** box, type the name of the location. The **Location/Other Name** is required.
5. In the **Location Code** box, type the code to assign to the location. The **Location Code** is required.
6. From the **Location Type** drop-down list, select one of the following location types:
 - a. **B** - Business Address
 - b. **L** - Local Cache Address
 - c. **N** - National Cache Address
 - d. **R** - Regional Cache Address
7. In the **Address 1**, **Address 2**, **City**, **State**, and **Zip** boxes, type the location's address.
8. In the **POC Name** box, type the name of the point-of-contact at the location.

9. In the **POC Email** box, type the e-mail address for the point-of-contact.
10. In the **POC Phone #** box, type the telephone number for the point-of-contact.
11. In the **Fax Phone #** box, type the fax number for the point-of-contact.
12. In the **Remarks** box, type any remarks applicable to the location.
13. To save the new **Location**, click the **Save** button.
14. To close the **Add Location/Other** window, click the **Close** button.

V. EDIT OUTSIDE INCIDENT LOCATION

A. To edit a location that is outside of an incident:

1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. Click the **Add/Edit Location** button in the **Supply** toolbar.
3. Click the **Outside Incident** button. Then click to select the location you want to edit in the grid at the top of the window.
4. For outside locations that you added, you can change all of the location's information. For outside locations that are standard in the system, you can make changes to the following information:
 - a. POC Name
 - b. POC Email
 - c. Remarks
5. Click the **Save** button to save any changes you made.
6. Click the **Close** button to close the **Add Location** window.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	10.8 - View Supply History
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. View a History of Supply Transactions.

I. VIEW SUPPLY HISTORY

A. To view a history of Supply transactions:

1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. Click the **View History** button in the **Supply** toolbar.
3. Click the **Resource/Location** button to view a list of resources and locations with supply transactions.

OR

Click the **Supply Items** button to view a list of items with supply transactions.

4. Click the plus sign (+) next to a **Resource/Location** or a **Supply Item** to display a list of transactions.
5. When you have finished viewing the supply transactions, click the **Close** button to close the **View Supply History** window.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	10.9 - Supply Inventory
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Turn Inventory Tracking ON.2. Manually change inventory counts.3. Perform an Advanced Search of supply items.4. Change a supply item quantity.

I. SUPPLY INVENTORY

- A. Turn Inventory Tracking ON.
- B. Manually change inventory counts.
- C. Perform an Advanced Search.
- D. Change a supply item quantity.

II. TURN INVENTORY TRACKING ON

- A. To turn Inventory Tracking on:
 1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
 2. Click the **Supply** tab.
 3. Click to check the **Track Inventory** checkbox.
 4. To save the change, click the **Save** button. Then click the **OK** button to close the **Options** window.

NOTE: If supply items were not **Received** in the **Supply** module, your inventory counts will be off when you turn on the **Inventory Tracking** option.

III. MANUALLY CHANGE INVENTORY COUNTS

- A. To use the **Correct Item Inventory** button to update Inventory Counts in the Supply module based on a manual count:
 1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. From the **Supply** drop-down menu, select the **Inventory** option to open the **Supply-Inventory** window.
3. In the **Items to Inventory** grid, click the supply item that needs corrections made to the inventory count.
4. Click the **Correct Item Inventory** button to open the **Correct Item Inventory** window.
5. In the **Actual NRFI** box, type the total number of items that are **Not Ready For Issue**.
6. In the **Actual RFI** box, type the total number of items that are **Ready For Issue**.
7. Click the **Save** button to save the counts to the **Corrected Inventory Items** grid.
8. Repeat steps 3 - 7 for each supply item that needs corrections made to the inventory count.

NOTE: If your team is part of the **Supply Pilot**, you can scan either the bar code in the **Smart**

Book for the inventory item or the **NFES Bar Code** on the item. When you scan the bar code, the system automatically opens the **Correct Item Inventory** window with the scanned inventory item selected. Repeat steps 5-7.

9. After all of the inventories that needed corrections have been added to the **Corrected Inventory Items** grid, click the **Save** button that displays on the right side of the window.

B. To use the **Quick Inventory** button to manually change inventory counts:

1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. From the **Supply** drop-down menu, select the **Inventory** option.
3. Click the **Quick Inventory** button to open the **Quick Adjust Inventory Item Counts** window.
4. In the **NFES #** box, type the NFES number for the item that needs corrections made to the inventory count.
5. If appropriate, type a property number in the **Property Number** box or select the number from the drop-down list.
6. In the **Actual NRFI** box, type the total number of items that are **Not Ready For Issue**.
7. In the **Actual RFI** box, type the total number of items that are **Ready For Issue**.
8. Click the **Save** button to save the item counts to the **Corrected Inventory** Items grid.

NOTE: The **Quick Adjust Inventory Item Counts** window remains open after you save the new item count. This enables you to quickly add another adjustment.

9. Repeat steps 4 - 8 for each supply item that needs corrections made to the inventory counts.
10. After all of the inventories that needed corrections have been added to the **Corrected Inventory Items** grid, click the **Cancel** button to close the **Quick Adjust Inventory Item Counts** window.
11. Click the **Save** button that displays on the right side of the window to save the corrected inventory counts.

IV. ADVANCED SEARCH

A. To perform an Advanced Search in the Items to Inventory grid:

1. In the **Advanced Search** box on the right side of the window, enter the term for which you want to search.
2. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in either the name or the description. For example, if you entered AXE

as your search term, only those items with AXE in the name or description would display in the grid.

3. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

V. CHANGE INVENTORY QUANTITY

A. To update the quantity define for an item listed in the **Corrected Inventory Items** grid:

1. Click the item listed in the **Corrected Inventory Items** grid that you want to change.
2. Click the **Change Inventory** button to open the **Adjust Inventory Item Count** window.
3. In the **Actual RFI** box, type the total number of items that are **Ready For Issue**.
4. In the **Actual NRFI** box, type the total number of items that are **Not Ready For Issue**.
5. Click the **Save** button to save the new quantities for the item.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	10.10 - Receive Supplies
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Receive Supply Items.2. Filter Supply Items.3. Perform an Advanced Search in the Item to Receive grid.4. Remove or change the quantity for an Item Being Received.

I. RECEIVE SUPPLIES

- A. Receive items into Supply.
- B. Filter Item to Receive grid.
- C. Perform an Advanced Search.
- D. Remove or change the quantity of Items Being Received.

II. RECEIVE SUPPLY ITEMS

- A. To use the **Receive Items** button to receive items into the Supply module:

NOTE: Supply items do not need to be received before issuing.

NOTE: If you are using the **Track Inventory** option, it is a good idea to receive supply items to ensure your counts are correct.

1. From the **Modules** drop-down menu, select the **Supply** option.

OR

Click the **Supply** button in the **Main** toolbar.

2. Click the **Receive** button in the **Supply** toolbar to open the **Supply-Receive** window.
3. From the **From Location** drop-down list, select the location from which you are receiving the supply item.

NOTE: If you do not select a location before receiving a supply item, a message displays indicating that a location was not selected. Click the **Yes** button to receive the item without selecting a location. Click the **No** button to cancel the receive procedure and select a location.

4. In the **Item to Receive** grid, click the item you want to receive.
5. Click the **Receive Item** button. A **Receive Item** window displays.
6. In the **Quantity to Receive** box, enter the total number of items being received.

NOTE: Make sure to enter the total number of actual items, rather than the unit of items (e.g. when receiving a box of shovels enter the number of shovels rather than the number of boxes.)

7. Enter the **Property #** assigned to the item, if applicable.
8. Enter the **Serial #** assigned to the item, if applicable.
9. Enter an **Additional #** assigned to the item, if applicable.
10. In the **Remarks** box, type any remarks that apply to the receive item transaction.
11. Click the **Save** button to save the supply item to the **Items Being Received** grid.
12. Repeat steps 4 - 11 for each item you are receiving from the selected location.

NOTE: If your team is part of the **Supply Pilot**, you can scan either the bar code in the **Smart**

Book for the item you are receiving or the **NFES Bar Code** on the item. When you scan the bar code, the system automatically displays the item in the **Items Being Received** grid on the screen. If there are multiple quantities you are receiving, scan the bar code multiple times to increase the quantity amount.

13. When all items you are receiving are listed in the **Items Being Received** grid, click the **Save** button to complete the **Receive** procedure.

B. To use the **Quick Receive** button to receive items into the Supply module:

1. From the **Modules** drop-down menu, select the Supply option.

OR

Click the **Supply** button in the **Main** toolbar.

2. Click the **Receive** button in the **Supply** toolbar to open the **Supply-Receive** window.
3. Click the **Quick Receive** button to open the **Quick Receive Item(s)** window.
4. In the **NFES #** box, enter the **NFES** number for the supply item you are receiving.
5. If you are receiving more than one supply item with the same **NFES** number, click to check the **Do not clear NFES #** checkbox. This leaves the **NFES** number in the **NFES#** box after you click the **Save** button.
6. In the **Quantity to Receive** box, enter the total number being received.
7. If applicable, enter a property number for the item in the **Property #** box.
8. Click the **Save** button. The item displays in the **Items Being Received** grid and the **Quick Receive Item(s)** window remains open. You can then quickly enter another item.
9. Repeat steps 4 - 8 for each item you are receiving from the selected location.
10. When you have finished receiving items, click the **Cancel** button to close the **Quick Receive Item(s)** window.
11. Click the **Save** button to finish receiving the items into **Supply**.

III. FILTER ITEM TO RECEIVE

A. On the Supply - Receive window, click one of the following buttons to filter the list of supplies:

1. **All** - Displays all supply items
2. **Non NFES** - Only displays supply items without **NFES** numbers
3. **Only NFES** - Only displays supply items with **NFES** numbers
4. **Account** - Only displays **Accountable** supply items

IV. ADVANCED SEARCH

A. To perform an Advanced Search in the Item to Receive grid:

1. In the **Advanced Search** box on the right side of the window, enter the term for which you want to search.
2. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in either the name or the description. For example, if you entered AXE as your search term, only those items with AXE in the name or description would display in the grid.
3. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

V. REMOVE/CHANGE ITEM BEING RECEIVED

A. To remove or change the quantity of an item in the Item Being Received grid:

1. In the **Items Being Received** grid, click the item you want to edit.
2. Click the **Remove/Change Receive** button to open the **Receive Items** window.
3. In the **Enter the correct quantity to Receive** box, enter the total number being received.

NOTE: To remove the item, enter **0** (zero) in the **Enter the correct quantity to Receive** box.

4. Click the **Save** button to change the quantity or remove the item.



UNIT 11

I-Suite Injury/Illness

7/12/2013

This Training Manual is for use with the 13.01.00 version of the I-Suite System.

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STUDENT MANUAL

COURSE:	I-Suite
UNIT:	11.0 – Injury and Illness: Overview.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the purpose of the Injury/Illness module.2. Identify the basic features of the Injury/Illness screen.

I. INJURY/ILLNESS

A. Identify the purpose of the Injury/Illness Module.

1. Use the Injury/Illness module to track injuries and illnesses for resources during an incident.

B. Identify the basic features of the Injury/Illness Screen.

1. The **Injury/Illness** toolbar is located to the right of the **Filter** toolbar. The buttons in this toolbar include:
 - a. **Show Injury/Illness Details** - If the **Injury/Illness** area at the bottom of the window is closed, click this button to open the area.
 - b. **Defaults** - Click this button to open the **Injury/Illness Options** window. Use this window to set the defaults for the **Injury/Illness** module.
 - c. **View History** - Click this button to view a history of injuries and illnesses recorded for resources in the database.
 - d. **Stats Base** - Click this button to define statistics to use in generating the **Injuries and Frequency** report.
 - e. **Previous Injury/Illness** - When this checkbox is checked, only those resources with Injury/Illness records are included in the **Resources** grid.
2. The **Resources** grid contains a list of the resources currently in the I-Suite database.
3. Use the **Manage Injury/Illness** area at the bottom of the window to add new injury illness records or edit existing records for a resource.
4. The **Injury/Illness** grid at the bottom of the window displays a list of injury and illness records defined for the selected resource.

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 11.1 – Injury and Illness: Options.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Select Injury/Illness Columns and set the order.
 2. Define a default Incident Type.
 3. Define a default Management Level.
 4. Define default Estimated Hours Worked / Day

I. INJURY/ILLNESS OPTIONS

- A. Select Injury/Illness Columns and set the order.
- B. Define default Incident Type.
- C. Define default Management Level.
- D. Define default Estimated Hours Worked / Day

II. RESOURCE GRID

- A. To identify the columns to display in the grid and the order in which to display them:
 1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.

OR

Click the **Defaults** button on the Injury/Illness window.

2. Click the **Injury/Illness** tab.
3. Under **Resource Grid Columns**, click to check the checkbox next to each of the columns you want to include in the **Resources** grid.

NOTE: You can also click to highlight a column, and then click the **Show** button to display that column in the grid. If you want to remove the selected columns from the **Resources** grid, click the **Hide** button.

4. To adjust the order in which the columns display on the **Injury/Illness** window, click a column. Then click the **Move Up** or **Move Down** button to move the column.
5. When you have made all of your changes, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

III. INCIDENT TYPE DEFAULT

- A. To identify a default **Incident Type** to display in the **Incident Type** box on the Injury/Illness window:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.

OR

Click the **Defaults** button on the Injury/Illness window.

2. Click the **Injury/Illness** tab.
3. From the **Incident Type** drop-down list, select one of the following types to use as the default:
 - All Hazard
 - Prescribed Fire

- Wildland Fire
- Wildland Fire Use

4. Click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

IV. MANAGEMENT LEVEL DEFAULT

A. To identify a default **Management Level** to display in the **Management Level** box on the Injury/Illness window:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.

OR

Click the **Defaults** button on the Injury/Illness window.

2. Click the **Injury/Illness** tab.

3. From the **Management Level** drop-down list, select the level (1-5) to use as the default.

4. Click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

V. ESTIMATED HOURS WORKED / DAY

A. To identify the default hours to display in the Estimated Hours Worked / Day box on the Stats Base window:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.

OR

Click the **Defaults** button on the Injury/Illness window.

2. Click the **Injury/Illness** Tab.

3. In the **Estimated Average Hours Worked per Day per Resource** box, type the number of hours to use as the default.

4. Click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	11.2 – Injury and Illness: Adding an Injury/Illness.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Add injury, illness or prevention records.2. Use advanced search to find an injury or illness type.

I. ADD INJURY/ILLNESS/PREVENTION

A. To add an injury, illness or prevention record:

1. From the **Modules** drop-down menu, select the **Injury/Illness** option.
2. In the **Resources** grid, click the resource for which you are adding the injury, illness or prevention record.

NOTE: The resource you select must be a person. You cannot create an injury, illness or prevention record for a non-person resource.

3. Click the **Injury**, **Illness** or **Prevention** option to identify whether this is an injury, illness or prevention record.

NOTE: The labels on the window will change based on the option you select. For example, if you select **Injury**, the label **Injury Date** displays. If you select **Illness**, the label **Illness Date** displays.

4. If the condition is pre-existing, click to check the **Pre-Existing** option.
5. In the **Seen Date** box, enter the date when the resource was initially seen for the condition. You can either type the date or select it from the drop-down calendar.
6. In the **Injury/Illness/Prevention Date** box, enter the date when the injury or illness first occurred. If this is a prevention visit, enter the date when the resource first needed the prevention item. You can either type the date or select it from the drop-down calendar.
7. In the **Injury/Illness/Prevention Time** box, enter the time when the injury or illness occurred. If this is a prevention visit, enter the time when the resource needed the prevention item.
8. From the **Location on Incident** drop-down list, select where the resource was located when the injury or illness occurred. If this is a prevention visit, select the location where the resource needs the prevention item.
9. From the **Incident Type** drop-down list, select the appropriate incident type.

NOTE: If a default incident type was defined on the **Options** window, it will automatically display in the **Incident Type** box. If needed, you can change this entry by selecting another type from the drop-down list.

9. From the **Incident Management Level** drop-down list, select the appropriate management level.

NOTE: If a default management level was defined on the **Options** window, it will automatically display in the **Incident Management Level** box. If needed, you can change this entry by selecting another level from the drop-down list.

10. From the **Incident Phase** drop-down list, select the appropriate phase.
11. From the **Incident Where Injury/Illness/Prevention Occurred** drop-down list,

select the incident where the resource was working when the injury or illness occurred. If this is a prevention visit, select the incident where the resources needs the prevention item.

NOTE: The entry in the **Incident Where Injury/Illness/Prevention Occurred** box automatically defaults to the incident where the resource is assigned.

12. From the **Injury/Illness Type** drop-down, select the appropriate injury or illness.

NOTE: If **Prevention** is selected, the **Injury/Illness Type** box does not display on the window. Enter information about the prevention visit in the **Remarks** box.

NOTE: If you cannot find the appropriate injury or illness type, click the **Search** button to perform an advanced search. For more information on using the Advanced Search function, refer to section *II. Advanced Search*.

13. From the **Activity at Time of Injury/Illness/Prevention** drop-down list, select the activity the resource was performing when the injury or illness occurred. If this is a prevention visit, select the activity for which the resource needs the prevention item.

14. From the **Section Assignment** drop-down list, select the appropriate section assignment.

15. From the **Sub Assignment** drop-down list, select the appropriate sub-assignment.

NOTE: The options available in the **Sub Assignment** drop-down list are based on the **Section Assignment** that is selected.

16. In the **Division/Group Name** box, type the appropriate division or group name.

17. If duties were restricted or time lost because of the injury or illness, click to check the **Restricted Duty/Lost Time** checkbox.

18. If the resource was seen off-site for the injury or illness, click to check the **Treatment Off-Site** checkbox.

19. In the **Remarks** box, enter any additional information about the injury or illness. Use this area to identify any known or suspected factors that contributed to or caused the injury or illness. If this is a prevention visit, enter any information about the prevention item in this box.

NOTE: If your remarks will not fit in the **Remarks** box, click the **Remarks** button to display a **Remarks** window where you can enter additional remarks.

20. Click the **Save** button to save the injury, illness or prevention record.

NOTE: Notice that when you save the record, it automatically displays in the grid at the bottom of the window. This grid contains a list of all the injury, illness and prevention records that were defined for a resource.

II. ADVANCED SEARCH

A. To perform an advanced search for an injury or illness type:

1. Click the **Search** button that displays next to the **Injury/Illness Type** box.
2. In the **Search For** box, type the name of the injury or illness that you want to find.
3. Click the **Search** button to limit the grid to only list those items with the search term (e.g. if you enter "Headache" only those items with headache in the name display in the grid).
4. In the grid at the top of the window, click the appropriate type.
5. Click the **OK** button to insert the highlighted type into the **Injury/Illness Type** box on the **Injury/Illness** window.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	11.3 – Injury and Illness: Editing an Injury/Illness.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Edit injury, illness or prevention records.2. Delete injury, illness or prevention records.

I. EDIT INJURY/ILLNESS/PREVENTION

A. To edit an injury, illness or prevention record:

1. From the **Modules** drop-down menu, select the **Injury/Illness** option.
2. In the **Resources** grid, click the appropriate resource.
3. In the **Injury/Illness/Prevention** grid at the bottom of the window, click the record you want to edit.
4. Make the appropriate changes to the information.
5. Click the **Save** button to save the changes.

II. DELETE INJURY/ILLNESS/PREVENTION

A. To delete an injury, illness or prevention record:

1. From the **Modules** drop-down menu, select the **Injury/Illness** option.
2. In the **Resources** grid, click the appropriate resource.
3. In the **Injury/Illness/Prevention** grid at the bottom of the window, click the record you want to delete.
4. Click the **Delete** button at the bottom of the window.
5. When the **Confirmation** window displays, click the **Yes** button.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	11.4 – Injury and Illness: Working with Output.
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. View history.2. Create Stats Base.3. Print Reports.4. Export Injury/Illness Data.

I. OUTPUT OPTIONS

- A. View History
- B. Stats Base
- C. Injury/Illness Reports
- D. Export Injury/Illness Data

II. VIEW HISTORY

- A. To view a history of injury, illness and prevention records:
 1. From the **Modules** drop-down menu, select the **Injury/Illness** option.
 2. Click the **View History** button in the **Injury/Illness** toolbar.
 3. To list the records by resource, click the **Resource** button.
 4. Click the plus sign (+) next to a resource to display those injury, illness, and prevention records created for the resource.

NOTE: When **Managing Incidents Separately**, the grid only includes those resources assigned to the selected incident. If a resource was assigned to the selected incident, but received the injury/illness/prevention while working on a different incident, the name of the incident on which they were working displays in the **Occurred Incident** column.

When **Manage All Incidents as One** is selected, an **Assigned Incident** column displays in the grid. This column identifies the incident to which the resource was assigned. The **Occurred Incident** column identifies the incident on which they were working when the injury/illness/prevention occurred.

5. To list the records by injury, illness and prevention, click the **Injury/Illness/Prevention** button.
6. Click the plus sign (+) next to a record to display a list of resources for which the injury/illness/prevention record was created.

NOTE: When **Managing Incidents Separately**, the grid only includes those injuries and illnesses that occurred for the selected incident. When you click the plus sign (+) next to an Injury/Illness/Prevention record, a list of resources for which the records were created displays. The **Assigned Incident** column identifies the incident to which the resource was assigned.

When **Manage All Incidents as One** is selected and you click the plus sign (+) next to an Injury/Illness/Prevention record, an **Occurred Incident** column displays. This column identifies where the resource was working when the injury/illness/prevention occurred.

7. After you have finished viewing the history, click the **Close** button to **Close the View History** window.

III. STATS BASE

NOTE: Use the **Stats Base** option to calculate the cumulative hours worked on a defined date. I-Suite uses the statistics defined in the Stats Base when generating the **Injuries and Frequency** report.

NOTE: To **Add** or **Edit** Stats Base data, a **Single Incident** must be selected. You cannot **Add** or **Edit** Stats Base data when in **Manage All Incidents as One** mode.

A. To add statistics to the Stats Base:

1. From the **Modules** drop-down menu, select the **Injury/Illness** option.
2. Click the **Stats Base** button in the **Injury/Illness** toolbar.

NOTE: If the **Manage All Incidents as One** checkbox is checked, a message displays indicating that you cannot **Add** or **Edit** Stats Base Data when **Manage All Incidents As One** is selected. If you click **Yes** to continue, the Stats Base window opens in **View Only** mode.

1. In the **Date** box, enter the appropriate date for the statistics. You can either type the date or select it from the drop-down calendar.
2. In the **Total People** box, type the total number of people working on the specified date.
3. In the **Est. Hrs Worked / Day** box, type the average number of hours each person worked that day.

NOTE: The number in this box defaults to the number defined in the **Estimated Average Hours Worked per Day per Resource** box on the **Options - Injury/Illness** window.

6. Click the **Save** button.

NOTE: When you save the statistics, I-Suite automatically calculates the cumulative work hours for that day. The statistics display in the grid at the top of the window.

IV. INJURY/ILLNESS REPORTS

A. To print standard Injury/Illness reports:

1. Click the **Reports** button in the toolbar. Then click to select the **Injury/Illness** button.

OR

From the **Reports** drop-down menu, select **Injury/Illness Reports**.

2. Click to select one of the following reports:
 - a. **Injury/Illness by Type** - This report identifies the total number of injury, illness and prevention records currently defined in the database. The information is broken down by injury/illness type.

NOTE: Because no type is assigned to **Prevention** records, they are listed generally under **Prevention**.

To generate an Injury/Illness by Type report:

- Under **Report Settings**, click one of the following options to identify the dates to include in the report:

All Dates - Includes all dates in the report.

Date Range - Includes the date range defined in the **Date Range** boxes. When you select this option, you must enter dates into the two boxes.

- To preview the report, click the **Preview** button. To print the report, click the **Print** button.

b. **Injury/Illness/Prevention** - This report includes detailed information about injury, illness or prevention records.

NOTE: The **Injury/Illness/Prevention** report does not include resource names. It only identifies the injury, illness or prevention information.

To generate an Injury/Illness/Prevention report:

- Under **Sort**, double click each sort to use in the report. The **Sort** moves from the left frame to the right frame. The sort order in the report is based on the order in which you select the sort options.
- Under **Event Category**, click one of the following options to identify the information to include in the report:

Injury - Only includes **Injury** records in the report.

Illness - Only includes **Illness** records in the report.

Prevention - Only includes **Prevention** records in the report.

All - Includes **Injury**, **Illness** and **Prevention** records in the report.

- To preview the report, click the **Preview** button. To print the report, click the **Print** button.

c. **Injury/Illness by Date** - This report identifies the total number of injuries, illnesses and prevention visits that occurred on a defined date.

To generate an Injury/Illness by Date report:

- Under **Report Settings**, click one of the following options to identify the dates to include in the report:

All Dates - Includes all dates in the report.

Date Range - Includes the dates defined in the **Date Range** boxes. When you select this option, you must enter dates into the two boxes.

- To preview the report, click the **Preview** button. To print the report, click the **Print** button.

- d. **Injuries and Frequency** - This report identifies the number of people injured as compared to the number of people working and the hours worked on a defined date. It also identifies the cumulative injuries and frequency of injuries.

NOTE: The **Injuries and Frequency** report uses the statistics defined in the **Stats Base** to generate the data for this report.

To print an Injuries and Frequency report:

- Under **Report Settings**, click one of the following options to identify the dates to include in the report:

All Dates - Includes all dates in the report.

Date Range - Includes the dates defined in the **Date Range** boxes. When you select this option, you must enter dates into the two boxes.

- Under **Frequency Formula**, click one of the following options to identify the formula to use in calculating the data for the report:

OSHA (# injuries/illnesses X 200,000) / (# of hours worked)

BASIC (# injuries/illnesses) / (# of hours worked)

- To preview the report, click the **Preview** button. To print the report, click the **Print** button.

- e. **Medical Unit Daily Summary** - This report contains a summary of injuries and illnesses that were reported to the Medical Unit for each defined date.

To generate a Medical Unit Daily Summary:

- Under **Report Settings**, click one of the following options to identify the dates to include in the report:

All Dates - Includes all dates in the report.

Date Range - Includes the dates defined in the **Date Range** boxes. When you select this option, you must enter dates into the two boxes.

- To preview the report, click the **Preview** button. To print the report,

click the **Print** button.

- f. **Injury/Illness Types Report** - This report contains a list of all Injury/Illness Types the medical or safety officer can select from the **Injury/Illness Type** drop-down list.

To generate an Injury/Illness Types Report:

- On the Injury/Illness Reports window, click the **Injury/Illness Types** option.
- To preview the report, click the **Preview** button. To print the report, click the **Print** button.

V. EXPORT INJURY/ILLNESS DATA

A. To export **Injury/Illness** data and upload it to the **Data Repository** site:

1. The **Injury/Illness** user must contact the Database Administrator (usually the **CTSP**) and request an Injury/Illness Export.

NOTE: The CTSP uses the **Export Data** option in **Database Admin** to export **Injury/Illness** data to a file and upload it to the **Data Repository** site.