

Getting help

- Access the I-Suite website at: <http://isuite.nwcg.gov>
- Contact the I-Suite Helpdesk at: (866) 224-7677

Time toolbar and toolbar buttons



Personnel Time

Personnel Data

- ◆ Personnel data is initially defined in Resources. Before you can Post Time, you must edit the Resource records and add Time data.
- ◆ Assign one of the following **Employment Type's** to the resource:
 - AD
 - FED
 - OTHER
- ◆ If the **Employment Type** is **AD**, the **Social Security Number** and **Verify SSN** boxes become active. If **FED** or **OTHER** is selected, the **Social Security Number** and **Verify SSN** boxes are disabled.
- ◆ **Social Security Numbers** are encrypted and only display as asterisks when they are entered. To ensure that the number was entered correctly, you must enter it a second time in the **Verify SSN** box.
- ◆ Resources with an **AD Employment Type** must have a **Social Security Number** defined before an **Original OF-288** will print for them.
- ◆ If a **Fax** number for a **FED** or **OTHER** resource is defined, you can generate the **Personnel Time report (Print/Fax)** for that resource.
- ◆ Casuals must have a correct **Home Unit Code** and **Position** defined to process payments.

Post Personnel Time

- ◆ The **Date** automatically changes when posting Time that extends beyond midnight. If you post **Overlapping Hours**, you must verify the overlap before proceeding.
- ◆ 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 are available. If a single incident is selected, only accounting codes for that incident are available.

Personnel Time Cont.

- ◆ When posting **GUAR**, **COP** or **DAY OFF** time for a **FED** or **Other** resource, the **Start Time** and **Stop Time** boxes are disabled. A **Start** and **Stop Time** do not need to be defined for these **Special** time postings.
- ◆ When posting **GUAR**, **COP** or **DAY OFF** time for an **AD** resource, the **Start Time** and **Stop Time** boxes are disabled and the **Hours** box is enabled. Enter the number of hours for the **AD** resource in this box. The maximum number of hours you can enter is **8**.

Employment Type	GUAR	COP	Day Off
AD	0-8 Hours	0-8 Hours	0 or 8 Hours
FED	0	0	0
OTHER	0	0	0

- ◆ Posted time is locked to an established employment code.
- ◆ When the **Post Return Travel Start Time Only** checkbox is checked:
 - **TVL** is automatically inserted into the **Special** box
 - **Number of Hours** is set to **0** (zero)
 - Only a **Start Time** is required
 - If a **Stop Time** is defined, the **Number of Hours** is still set to **0** (zero)
- ◆ When the **TVL** code is selected from the **Special** drop-down and the **Post Return Travel Start Time Only** checkbox is NOT checked:
 - A **Start Time** and a **Stop Time** are both required
 - The **Number of Hours** for travel is calculated from the **Start Time** and **Stop Time**
- ◆ When editing posted time, click outside of the grid to save the changes. When the pencil in the selector column changes from a pencil to an arrow, the changes were saved.
- ◆ If the special codes **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.

Crew Time

Crew Data

- ◆ 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.
- ◆ The two levels within a crew are the **Actual Crew** and the **Crew Members** or **Operators**.
- ◆ At the **Crew Level**, you can **Add** or **Edit** Crew information.
- ◆ At the **Member/Operator Level**, you can **Add** or **Edit** information for individual crew members or operators.
- ◆ All crew members must have a kind code for their position. Do NOT use **HC1** or **HC2**. This will affect the Cost module and prompt payment of Causal employees. If a kind code is not defined, the cost will carry over as a hand crew for each member.
- ◆ Assign one of the following **Employment Type's** to the crew members or operators:
 - AD
 - FED
 - OTHER
- ◆ If the **Employment Type** is **AD**, the **Social Security Number** and **Verify SSN** boxes becomes active. If **FED** or **OTHER** is selected, the **Social Security Number** and **Verify SSN** boxes are disabled.
- ◆ **Social Security Numbers** are encrypted and only display as asterisks when they are entered. To ensure that the number was entered correctly, you must enter it a second time in the **Verify SSN** box.
- ◆ Crew members with an **AD Employment Type** must have a **Social Security Number** defined before an **Original OF-288** will print for them.
- ◆ Casuals must have a correct **Home Unit Code** and **Position** defined to process payments.

Post Crew Time

- ◆ Click the **Select All** button to select all crew members listed in the **Crew Members** grid.
- ◆ Click the **Select None** button to unselect any members selected in the **Crew Members** grid.
- ◆ Click the **Invert Selection** button to select those crew members who are not selected and unselect those crew members who are selected.

Crew Time

- ◆ You can only post time to crew members with a **Checked In Status**.
- ◆ To copy time posted to one crew member and paste it to another crew member:
 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 Member grid. Then click the **Paste Copied Postings to Selected Member(s)** in the menu that displays.

OF-288

OF-288

- ◆ Select **Preview/Print DRAFT Invoice** to generate a Draft Invoice. Review the invoice before printing an Original copy. The word **DRAFT** prints on this invoice.
- ◆ Select **Preview/Print ORIGINAL Invoice** to generate an Original Invoice. This locks all postings included in the invoice. When a posting is locked, you cannot make any changes to it.
- ◆ Select **Preview/Print DUPLICATE ORIGINAL** to generate a copy of an Original Invoice. A list of available invoices from which you can select displays when you click this option.
- ◆ The **Social Security Number** does not print on the OF-288.
- ◆ When generating a **DRAFT Invoice**, you can generate an **OF-288 with Itemized Deductions**, an **OF-288 Only**, or **Itemized Deductions Only**.
- ◆ When generating an **ORIGINAL Invoice** or a **DUPLICATE ORIGINAL Invoice**, you can only generate an **OF-288 with Itemized Deductions**.
- ◆ To generate a **Final Invoice** for a resource, click to check the **Final Invoice** checkbox.
- ◆ For **Partial Pay**, do NOT select **Final Invoice**.

OF-288

- ◆ Make sure the **Last Date Included on Invoice** is set to include ALL posted time. The **Last Date Included on Invoice** defaults to the last date to which time was posted.
- ◆ Only the last column of posted time requires a signature. Signature boxes for all other columns with posted time are grayed out. When you select **Final Invoice**, a blank column for **Travel Time** is included on the invoice.

Correct an Original Printed Invoice

To correct an Original Invoice that was previously printed, delete the old invoice, make the appropriate corrections to the Postings, and then create and print the new invoice. This can only be done prior to the Financial Export.

1. On the Invoice window, click the **Delete Last Invoice For Selected Resource** button. Then click **Yes** on both **Warning** messages that display.
2. On the **Delete Reason** window, enter a reason for deleting the last invoice. Then click the **OK** button.

Finance Data Export

- ◆ Auditing is critical before processing a **Financial Export**.
- ◆ The procedure will export finalized accrual data, **Original OF-288** invoices for Casual (AD) employees and **Original OF-286** invoices that have been processed for payment.

OF-288 original invoices cannot be deleted or edited and accrual data cannot be modified once this export is completed.

- ◆ After the Data Export file is created, the export date and file name appears in the **Data Export History**.

Contracted Time

- ◆ If an agreement is not defined in the database, click the **Add Agreement** button to add a new agreement.
- ◆ If the appropriate administrative office is not defined in the database, click the **Add New Administrative Office for Payment** button on the Agreement window to add a new office.
- ◆ Make sure to assign the appropriate **Rate Type** and **Unit of Measure (UOM)** to the contracted resource.
- ◆ Rostering a **Member/Operator** is the same as adding and editing **Crews**.
- ◆ Not all **Members/Operators** require Time data.

Post Contracted Time

- ◆ To post a **Daily Rate** for a Contracted Resource, complete the **Start Date** and **End Date** boxes.
- ◆ You can post for one date or for a range of up to five dates.
- ◆ To post an **Hourly Rate** for a Contracted Resource, complete the **Date**, **Start** and **Stop Time** boxes.
- ◆ To post **Mileage** for a Contracted Resource, complete the **Date** and **Miles** boxes.
- ◆ To post **Each** for a Contracted Resource, complete the **Date** and **Each** boxes.
- ◆ When no actual work is performed under hire, select the **Guarantee Post** option and enter the applicable date(s).
- ◆ The **1/2 Rate** can apply to the **Primary**, **Special** or **Both Rates** when posting. The **1/2 Rate** reduces the **Guarantee Amount** on **Daily** by half.
- ◆ The **Guarantee Amount** only displays on the **OF-286**.
- ◆ **Post Options** display based on the **Primary** and **Special UOM's** selected.
- ◆ When you repost **Contracted Resource Time**, you can add to the original posting or overwrite the existing entry.

Contracted Time

Contracted Data

- ◆ 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.
- ◆ Verify whether the contractor is defined in the database before creating a Contract record. If the contractor is not defined, click the **Add Contractor** button to add a new contractor.

OF-286

OF-286

- ◆ Select **Preview/Print DRAFT Invoice** to generate a Draft Invoice. Review the invoice before printing an Original copy. The word **DRAFT** prints on this invoice.
- ◆ Select **Preview/Print ORIGINAL Invoice** to generate an Original Invoice. This locks all postings included in the invoice. When a posting is locked, you cannot make any changes to it.

After an Original OF-286 invoice is printed, the I-Suite application will not allow the Contractor or Agreement to be deleted or changed for that Resource.

- ◆ Select **Preview/Print DUPLICATE ORIGINAL** to generate a copy of an Original Invoice. A list of available invoices from which you can select displays when you click this option.
- ◆ When generating a **DRAFT Invoice**, you can generate an **OF-286 with Itemized Deductions**, an **OF-286 Only**, or **Itemized Deductions Only**.
- ◆ When generating an **ORIGINAL Invoice** or a **DUPLICATE ORIGINAL Invoice**, you can only generate an **OF-286 with Itemized Deductions**.
- ◆ To assign an **Actual Release Date and Time** to the resource from the OF-286 window, enter the date and time into the **Actual Release Date and Time** boxes.
- ◆ Make sure the **Last Date Included on Invoice** is set to include ALL posted time. The **Last Date Included on Invoice** defaults to the last date to which time was posted.
- ◆ You can only make changes by **Deleting the**

Correct an Original Printed Invoice

To correct an Original Invoice that was previously printed, delete the old invoice, make the appropriate corrections to the Postings, and then create and print the new invoice. This can only be done prior to the Financial Export.

1. On the Invoice window, click the **Delete Last Invoice For Selected Resource** button. Then click **Yes** on both **Warning** messages that display.
2. On the **Delete Reason** window, enter a reason for deleting the last invoice. Then click the **OK** button.

Invoices

Finance Data Export

- ◆ Auditing is critical before processing a **Financial Export**.
- ◆ The procedure will export finalized accrual data, **Original OF-288** invoices for Casual (AD) employees and **Original OF-286** invoices that have been processed for payment.

OF-286 original invoices cannot be deleted or edited and accrual data cannot be modified once this export is completed.

- ◆ After the Data Export file is created, the export date and file name appears in the **Data Export History**.

Faxing Time Reports

Fax Personnel Time Report

Requirements:

- A fax modem properly installed and correctly configured (see **Fax Setup QRC**).
- A fax/prINTER device set as the default printer.

Criteria for generating a Personnel Time Report:

- A person with time posted, an assigned fax number, an employment code of **FED** or **OTHER**, and **NOT** demobilized.

1. On the Select Reports window, click the **Personnel Time Report (Print/Fax)** option.
2. Select a **Start Date** and an **End Date**. Enter the **Time Unit Leader's Name and Phone**.

Because the date range is selected, the treeview frame on the left is populated. If it does not populate, then one or more of the defined criteria was not met.

3. Click to select the offices to which the report will be sent. Then click the **Fax Report** button.

*A warning message displays. **DO NOT** click **OK** on the warning message screen **UNTIL** the Fax Printer has been set as the default printer. The **Current Fax Number** for each report displays on the **Personnel Time Report** screen. The **Send Fax Wizard** screen displays for each selected fax number.*

4. Each time the **Send Fax Wizard** screen displays, enter the appropriate information by using the fax number selected in **Current Fax Number**.