Quick Reference

ITS

Getting help

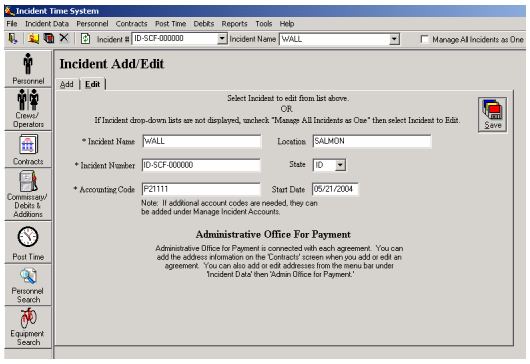
- Access the I-Suite website at: **http://isuite.nwcg.gov**
- Contact the I-Suite Helpdesk at: **(866) 224-7677**

ITS toolbar and toolbar buttons

Working with incident information

To review and edit incident data

1. On the tool bar, click the **Incident #** drop-down arrow, and then click to select the **incident** of your choice.
2. On the **Incident Data** menu, click **Incident Add/Edit**.
3. On the **Incident Add/Edit** screen, add or modify the information as appropriate:
4. To save your changes, click the **Save** button.



To manage all incidents as one

Remember, when working in this mode, you must select an incident to post time to for each resource.

- From any **ITS** screen, click to select the **Manage All Incidents as One** check box.

Working with personnel data

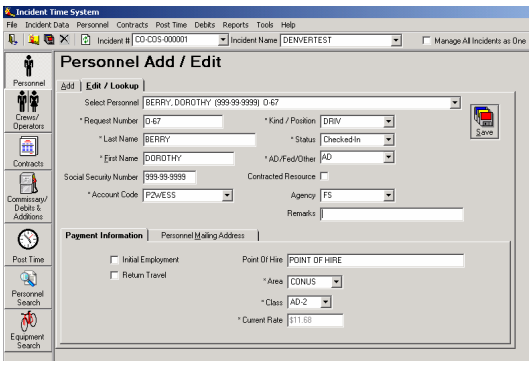
To edit personnel data

1. On the **Personnel Add/Edit** screen, click the **Edit/Lookup** tab.
2. Click the **Select Personnel** drop-down arrow, and then click to select the **Person** of your choice.
3. For AD personnel, type the person's **Social Security Number** in the **Social Security Number** box, in the format 123456789.
4. Click to select the **Account Code** and **Employment Code** of your choice.
5. To specify a contracted resource, click to select the **Contracted Resource** check box.

Working with personnel data

To edit personnel data (continued)

6. Complete the information on the **Payment Information** tab (for AD personnel) and on the **Personnel Mailing Address** tab as appropriate.
7. To save your changes, click the **Save** button.



To create/edit a crew

1. On the **Crew/Operator Roster** screen, click the **Add/Edit Crew/Operators** button, or, from the menu bar, select **Personnel / Crew/Operator Add/Edit**, and then click the **Add** or **Edit** tab as appropriate.
2. On the **Crew/Equipment** tab, complete the crew information as appropriate, and then click the **Save** button.

To add/edit a member/operator

1. Click the **Crew/Equipment to Add To** or **Select Crew/Equipment** drop-down arrow, select the primary resource – **Crew** or **Equipment** – of your choice, and then add or select member/operator information on the **Member/Operator** tab as appropriate.
2. Complete the information on the **Payment Information** tab (for AD personnel) and on the **Personnel Mailing Address** tab as appropriate.
3. To save your changes, click the **Save** button.
4. Add or edit the remaining **crew members** or **operators** as needed. Click the **Save** button after each new entry.

To assign all members/operators to Fed or Other

*This procedure only assigns the Fed or Other code to members/operators that do not have an **AD/Fed/Other** payment code.*

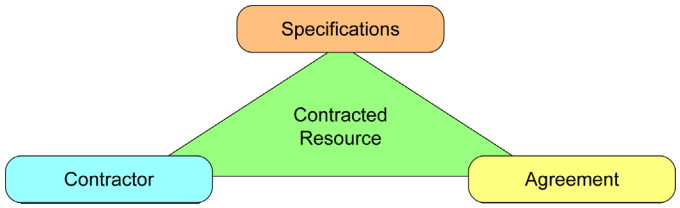
1. To set the **AD/Fed/Other** code for all members/operators assigned to the selected resource – **Crew** or **Equipment** – to Fed or Other, click the drop-down arrow, select Fed or Other, and then click the **Members to...** button.
2. On the **Warning** screen, click **Yes** to save.

Contracts, agreements, and resources

ITS

Understanding the relationship

- **Contractor.** A business entity that has available resources.
- **Agreement**. An OF-294 – Emergency Equipment Rental Agreement (EERA) – attached to a contractor. A contractor may have multiple agreements.
- **Specifications**. Conditions specified on the EERA that the resource must meet to fulfill the agreement.



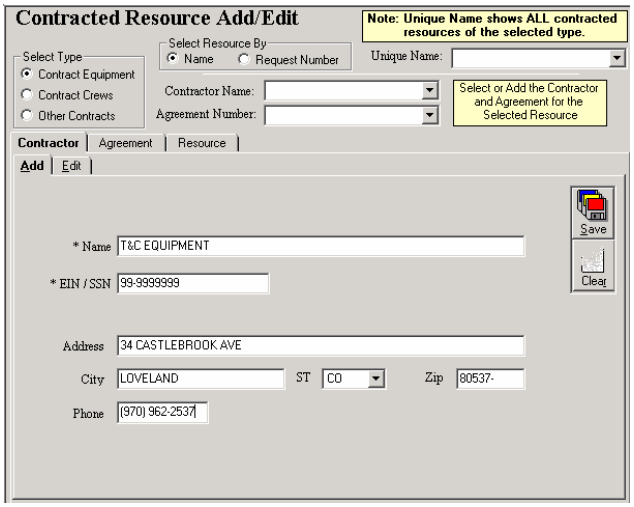
Working with contractor data

To review the list of existing contractors

Determine if the contractor already exists before creating a new one.

1. Click the **Contracts** button.
2. On the **Contracted Resource Add/Edit** screen under **Select Type**, click to select the appropriate **Type**.
3. Click the **Contractor Name** drop-down arrow, and then click to select the **Contractor** of your choice.

If the contractor does not appear on the drop-down list, then create one.



To create a contractor

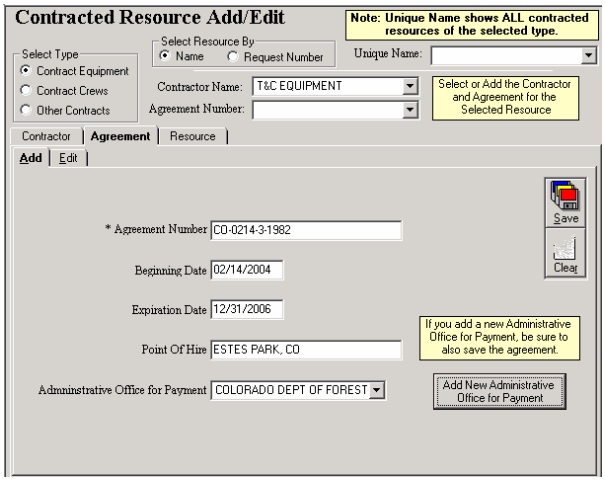
1. On the **Contracted Resource Add/Edit** screen, click the **Contractor** tab, click the **Add** tab, and then complete the following information as appropriate:
   - Name - Address - ST - Phone.
   - EIN/SSN - City - Zip
2. Click the **Save** button.
3. Proceed to the next task, **Attaching an agreement to a contractor**.

Attaching an agreement to a contractor

To create an agreement and attach it to a contractor

*Before proceeding, verify that the correct **Contractor** is displayed in the **Contractor Name** box.*

1. On the **Contracted Resource Add/Edit** screen, click the **Agreement** tab, click the **Add** tab, and then complete the following information as appropriate:
   - Agreement Number
   - Beginning and Expiration Date (of the agreement)
   - Point of Hire (location at the time of hire).
2. Click the **Administrative Office for Payment** drop-down arrow, select the **Administrative Office** of your choice, and then click the **Save** button.



To create a new adminstrative office for payment

1. On the **Contracted Resource Add/Edit** screen, click the **Add New Administrative Office for Payment** button, complete the office information as appropriate, and then click **Save**.

Linking resources to a contractor/agreement

To link a resource to a contractor/agreement

In the integrated environment, resources are added in IRSS.

1. On the **Contracted Resource Add/Edit** screen, select the appropriate **Type**, the **Resource**, and the **Contractor/ Agreement** of your choice.
2. On the **Resource** tab on the **Edit** tab, edit the resource specifications as appropriate, create a **Unique Name** for the resource, complete the **Rate Type(s)** and **Unit(s) of Measure**, and then press TAB to advance the cursor to the next **Rate Type** box.
3. Verify that the correct **Request Number**, **Contractor Name**, and **Agreement Number** are displayed on the upper portion of the **Contracted Resource Add/Edit** screen, and then click the **Save** button.
4. On the **Warning - Check for Correct Agreement/ Contractor** dialog box, click **Yes.**

Posting time

ITS

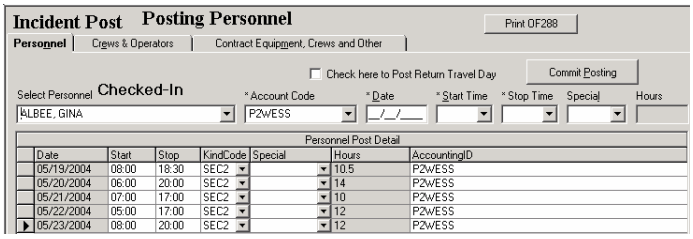
Posting personnel time

To post personnel time

1. Click the **Post Time** button.
2. On the **Incident Post** screen on the **Personnel** tab, select the **Person** of your choice.
3. Select the **Account Code** of your choice.
4. Complete the **Date**, **Start Time**, and **Stop Time**.

*Current **Date**, type =*
*Yesterday's (decrement) **Date**, type -*
Tomorrow's (increment) ***Date**, type +.*

5. Select the **Special** code of your choice.
6. To commit the posting, click the **Commit Posting** button.



To post return travel time

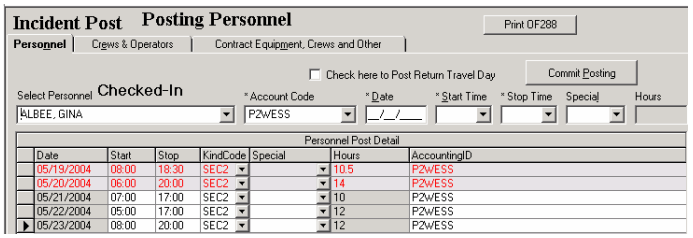
*Posting a return travel day sets the Special code to **TVL** and the number of Hours to **0** (zero).*

1. On the **Incident Post** screen on the **Personnel** tab, select the **Person** of your choice.
2. Click the **Check here to Post Return Travel Day** check box.
3. Complete the **Date** and **Start Time** boxes.
4. To commit the posting, click the **Commit Posting** button.

Locked postings

To identify locked postings

When an Original Invoice (OF-286 or OF-288) is printed, all postings for that period are locked to prevent adding or editing of posts. No postings for dates prior to or equal to the End Date of the latest invoice are allowed. To post time for a locked period (shaded rows), the invoice for that period must be corrected.



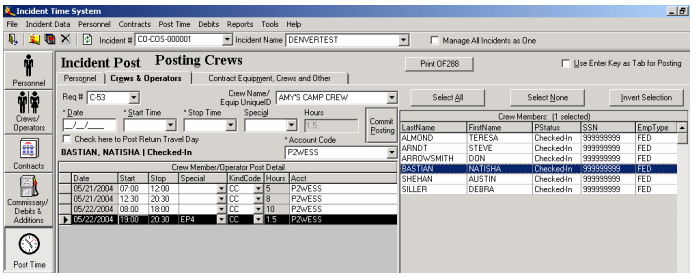
Posting crew time

To post crew time

1. Click the **Post Time** button.
2. On the **Crews & Operators** tab, select the **Crew Name** or **Equipment Unique ID** of your choice.
3. Under **Crew Members**, select the **Crew Member(s)** of your choice.

*To select all **Crew Members**, click the **Select All** button. To select more than one **Crew Member**, press and hold CTRL, and then select the **Crew Members** of your choice. To select a range of **Crew Members, press and hold SHIFT, and then click the starting and ending Crew Members** for that range.*

4. Complete the **Date**, **Start Time**, **Stop Time** boxes.
5. Select the **Account Code** and **Special** code of your choice.
6. Click the **Commit Posting** button, and then click **OK**.



Posting time for contracted resources

To post time for contracted resources

1. Click the **Post Time** button.
2. On the **Contract Equipment, Crews and Other** tab under **Select Type**, select the equipment type of your choice
3. Select the **Contractor Name** of your choice.
4. Select the **Equipment Unique ID** or **Request Number** of your choice.
5. Select the appropriate **Primary** and **Special** rates.
6. Select the **Account Code**.
7. Under **Post Options**, click to select the appropriate option, complete the **Rate Type**, and if appropriate, click to select the **1/2 Rate** check box(es).
8. Post the appropriate required information for the **Rate Type** and **Unit of Measure**.
9. To commit the posting, click the **Commit Posting** button.

To post	Do this
Daily rate	Complete **Start Date** and **End Date**.
Hourly rate	Complete **Date** and **Start** and **Stop** times.
Mileage	Complete **Date** and **Miles**.
Each	Complete **Date** and **Each**.

For equipment being used on any given day, but still under hire, enter a minimum of **15 minutes** and **1 mile**.

Commissary/debits & additions and 286 invoices

ITS

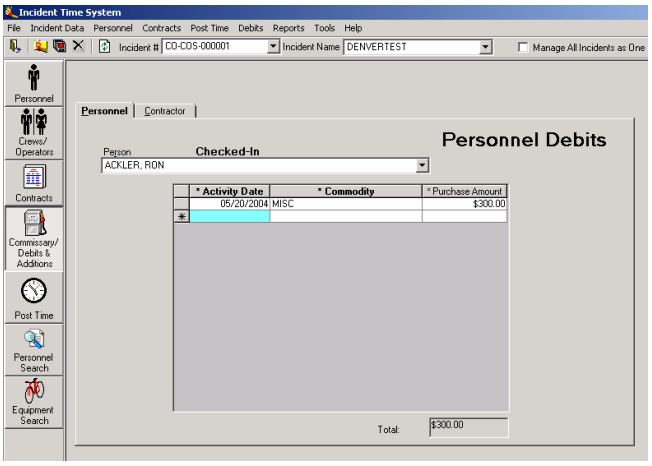
Posting deductions and additions

To post debits/additions to a personnel resource

1. Click the **Commissary / Debits & Additions** button.
2. On the **Personnel** tab, select the **Person** of your choice.
3. Enter the **Activity Date**.
4. Enter a description of the **Commodity**.
5. Enter the **Purchase Amount** of the commodity.

*To post an addition, enter the **Purchase Amount** as a negative number.*

6. To save the charges, press TAB to advance to the next line.

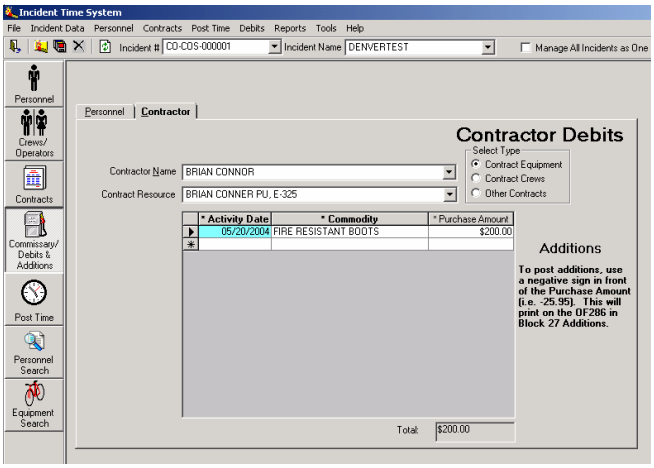


To post debits/additions to a contractor resource

1. Click the **Commissary / Debits & Additions** button.
2. On the **Contractor** tab under **Select Type**, select the appropriate type.
3. Select the **Contractor Name** of your choice, and then select the **Contract Resource** of your choice.
4. Enter the **Activity Date**.
5. Enter a description of the **Commodity**.
6. Enter the **Purchase Amount** of the commodity.

*To post an addition, enter the **Purchase Amount** as a negative number.*

7. To save the charges, press TAB to advance to the next line.



Working with invoices

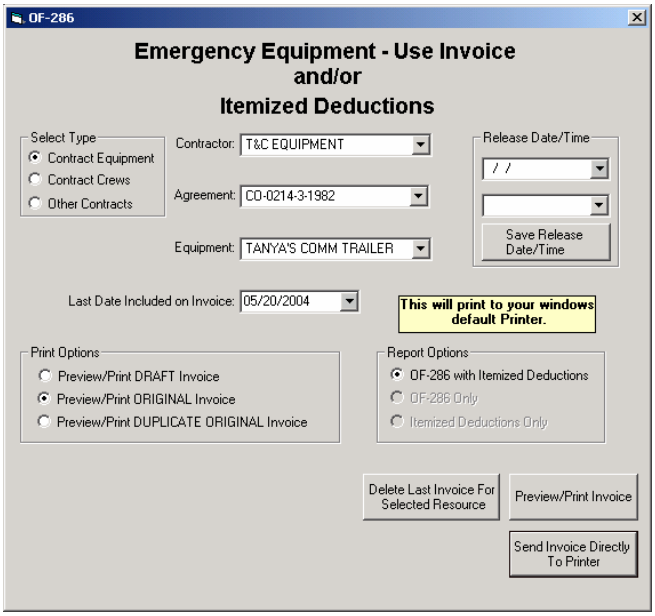
To print an original 286

*Be sure to set the **Last Date Included on Invoice** to include **ALL** of the time that has been posted.*

1. On the **Incident Post: Posting Equipment** screen, click the **Print OF286** button.
2. On the **OF-286** dialog box under **Select Type**, select the appropriate type.
3. Select the **Contractor Name**, **Agreement**, and **Equipment** of your choice.
4. Select the **Last Date Included on Invoice** for payment.
5. Select the **Release Date/Time**, and then click **Save**.

*If this is a partial payment, **DO NOT** complete the Release Date/Time .*

6. Under **Print Options**, select **Preview/Print ORIGINAL Invoice**.
7. Under **Report Options**, click the **report option** of your choice.
8. To preview and then print the report, click the **Preview/ Print Invoice** button, and then click the **Print Report** icon.



To correct an original 286 that has already been printed

To correct an Original OF-286 Invoice that has already been printed, delete the old invoice, make appropriate corrections, and then create and print the new invoice.

1. On the **Reports** menu, click **OF-286**.
2. On the **OF-286** dialog box, complete the **Contractor**, **Agreement**, and **Equipment** boxes.
3. Click the **Delete Last Invoice For Selected Resource** button, and then click **Yes** on both **Warning** screens.
4. On the **Delete Reason** screen, enter a reason for deleting the last invoice, and then click **OK**.

288 invoices and time reports

ITS

Working with invoices

To print an original 288

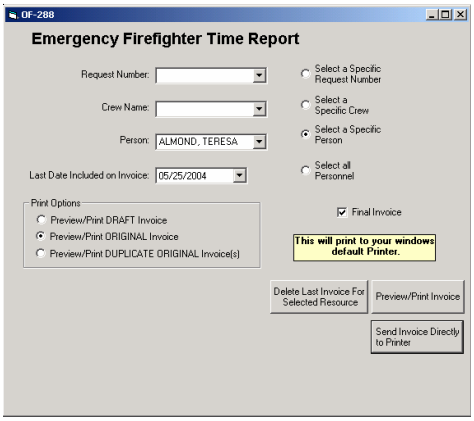
1. On the **Incident Post** screen on the **Personnel** or **Crews & Operators** tab, click the **Print OF288** button.
2. On the **OF-288** dialog box, select the person or crew of your choice.
3. Select the **Last Date Included on Invoice** for payment.

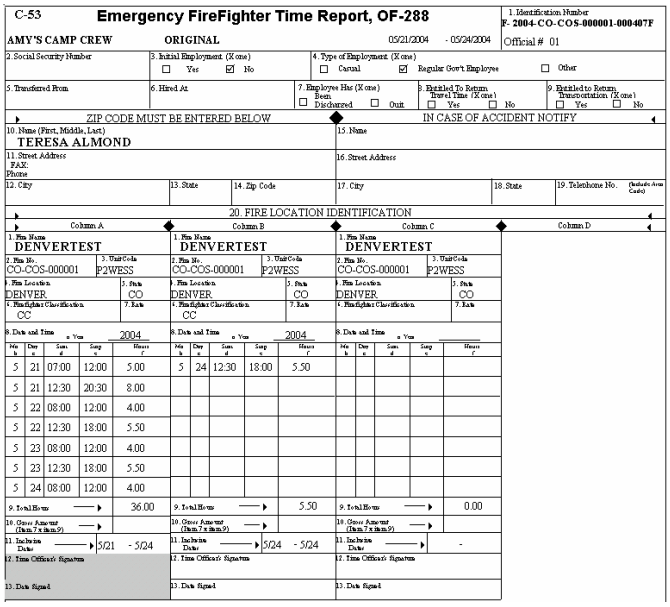
*The **Last Date Included on Invoice** will default to the last post date. Be sure to set the **Last Date Included on Invoice** to include **ALL** of the time that has been posted.*

4. Under **Print Options**, select **Preview/Print ORIGINAL Invoice**.
5. If applicable, click the **Final Invoice** check box.

*For partial pay, **DO NOT** select **Final Invoice**..*

6. To preview and then print the report, click the **Preview/ Print Invoice** button, review the invoice, and then click the **Print Report** icon.





*Only the last column of posted time requires a signature; signature boxes for all other columns with posted time are grayed out. When **Final Invoice** is selected, a blank column for travel time is included on the invoice.*

Working with invoices

To correct an original 288 that has already been printed

To correct an Original OF-288 Invoice that has already been printed, delete the old invoice, make appropriate corrections, and then create and print the new invoice.

1. On the **Reports** menu, click **OF-288**.
2. On the **OF-288** dialog box, select a person or a crew.
3. Click the **Delete Last Invoice For Selected Resource** button, and then click **Yes** on both **Warning** screens.
4. On the **Delete Reason** screen, enter a reason for deleting the last invoice, and then click **OK**.

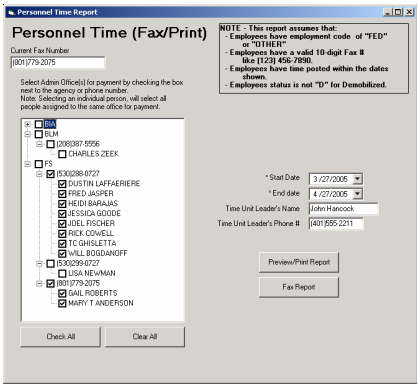
Faxing time reports

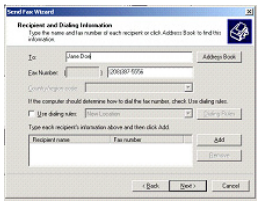
To fax a Personnel Time Report

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. Under **Reports**, click **Personnel Time Report (Fax/Print)**.





2. On the **Personnel Time Report** screen, select a **Start Date** and **End Date**, and then enter the **Time Unit Leader's Name** and **Phone**.

As the date range is selected, the treeview box on the left will be populated. If it does not populate, then one or more of the criteria detailed above has not been met.

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

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

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