USER'S GUIDE

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I-Suite User Guide

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Introduction

The I-Suite application is an Incident tracking system for natural disasters. The self-contained system was created so it can be up-and-running on site with little effort. The I-Suite application includes the following modules that allow you to track needed information:

- See "Resources "
- See "Demob "
- See "Incident Action Plan"
- See "Time "
- See "Cost"
- See "Custom Reports"
- See "Supply"
- See "Injury/Illness"

These modules within I-Suite are integrated, so data only needs to be entered once. Once the data is defined, it is available in all areas.

About I-Suite Documentation

I-Suite documentation is organized into sections based on the I-Suite modules and the types of tasks users will be performing in I-Suite. The beginning of each section includes an overview of the topics. Where appropriate, notes, diagrams and examples are included within the instructions. Topics in this section include:

- See "Before You Begin"
- See "User Manual ConventionsHelp Conventions"

Before You Begin

Before using I-Suite, make sure you are familiar with the following:

- Basic Personal Computer Concepts
- Function Keys
- Operating system (i.e. Windows XP, Windows 7)
- Logging into and out of the computer

User Manual Conventions

The following conventions are used within the User Manual:

1. Button names, option labels, tab names, and box names display in bold. For example, a step in a procedure might instruct you to: Select **Options** from the **Tools** drop-down menu.
2. Important information displays in the following manner:

This is how a important information displays.

Getting Started

The Getting Started section explains basic information for using the I-Suite application. Topics in this section include:

- See "I-Suite System Requirements"
- See "I-Suite Installation and Initial Setup"
- See "Logging into I-Suite"
- See "Common Features"
- See "Accessing Help"
- See "General Instructions"
- See "I-Suite Module Descriptions"
- See "Working with Grids"
- Options
- See "Uninstalling I-Suite"

I-Suite System Requirements

To install and run the I-Suite application, your personal computer must have the following minimum system requirements:

- Microsoft Windows XP

  OR

- Windows 7
- Administrator Privileges

I-Suite Installation and Initial Setup

This section explains how to download and install the I-Suite application.

To download and install software on an agency personal computer, you must follow that agency's regulations and requirements. You may also need to have Administrator access privileges granted before starting this process. For more information, contact your agency's System Administrator. If the computer will be the server or if you are running in stand-alone mode, make sure you install the **Server** application.

Downloading I-Suite

Follow the steps in this section to download the **I-Suite** application from the **I-Suite Website**:

1. Open your Web browser and access the Internet.
2. In the **Address** box, type **isuite.nwcg.gov** to open the I-Suite Website.
3. Click the **Download** button that displays at the top of the Web page.
4. When the **Download** page displays, scroll down the page until you see the version you want to download.

The most recent version of the program displays at the top of the page.

5. Click the **Server** link to download the server version of the program. Click the **Client** link to download the client version of the program.
6. When the **Save** window displays, use the options on the window to identify where you want to download the program. Then click **OK** or **Save** (depending on your browser) to download the file to your computer.

Installing I-Suite

Follow the steps in this section to install either the I-Suite **Server** application or the **Client** application. The main difference between the Server and Client applications is that the database and database servers are not installed with the Client system.

Make sure you exit all software applications before starting the installation process.

1. Access the folder where you downloaded the I-Suite program. See "Downloading I-Suite"
2. Double click the **I-Suite** program file (either **Client** or **Server)** to begin the installation process.
3. When the first **InstallShield Wizard** window displays, click the **Next** button.
4. Follow the instructions that display on the **InstallShield Wizard** windows to install the I-Suite system.

The InstallShield creates and installs the I-Suite application to the correct folders. DO NOT select a different **Destination Folder**.

5. When the installation process is complete, click the **Finish** button to restart your computer. You can then delete the downloaded installation file.

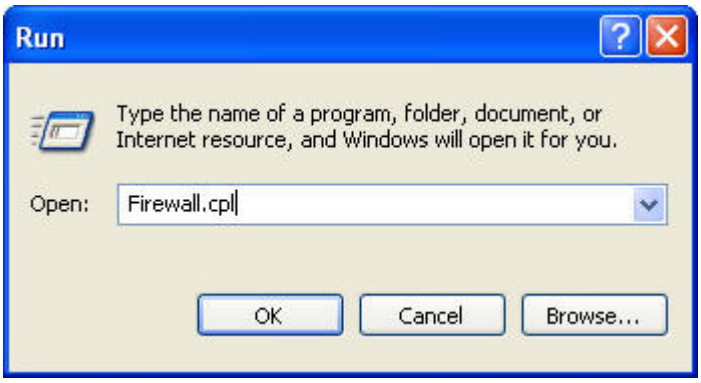
If you were installing the I-Suite Client, refer to the See "First Time Logging into I-Suite - Client" instructions. If you were installing the I-Suite Server, refer to the See "First Time Logging into I-Suite -Server" Instructions.

Enabling Server Connectivity for Windows XP

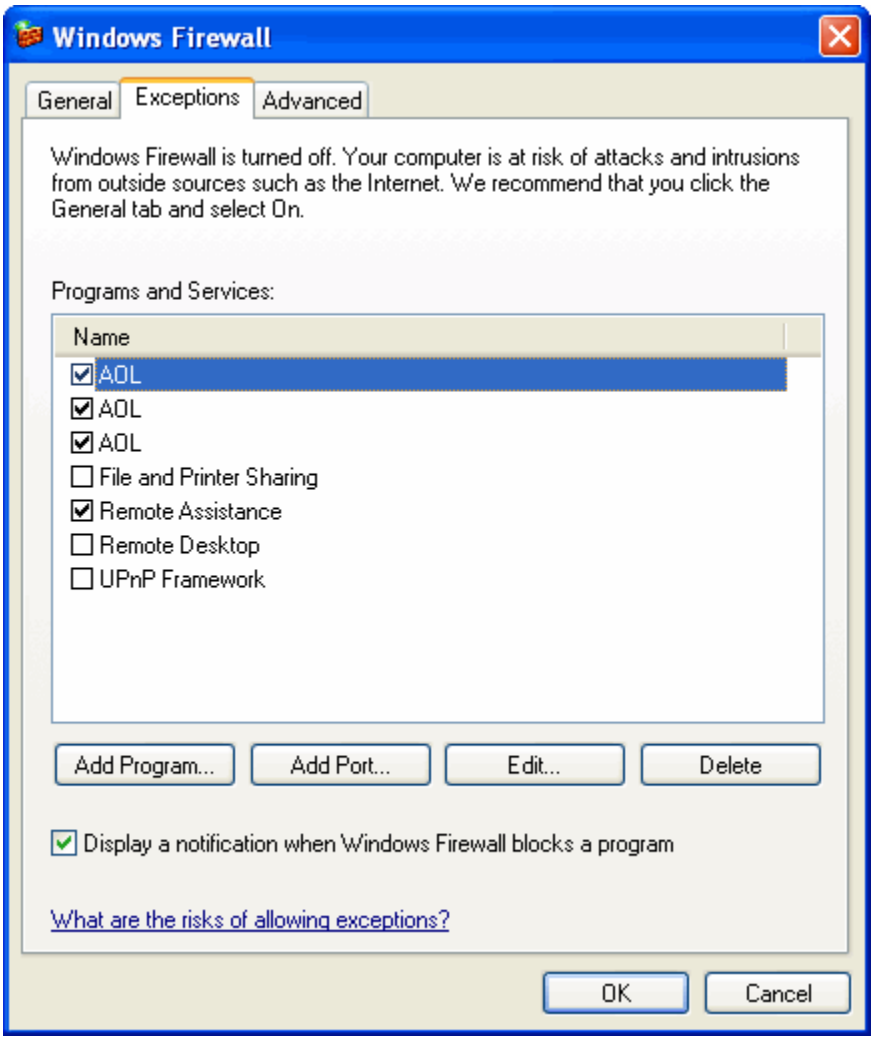
Follow the steps in this section to enable SQL server connectivity for Windows XP Service Pack 2:

To complete these procedures, you must be logged into Windows as an administrator. If you are running other instances of **SQL Server**, you will need to create an exception for the instance. If you decide at a later time that you do not want the instance included in the **Exception's** list, uncheck the checkbox next to the instance.

1. Click the Windows **Start** menu. Then click the **Run** option to open the **Run** window.

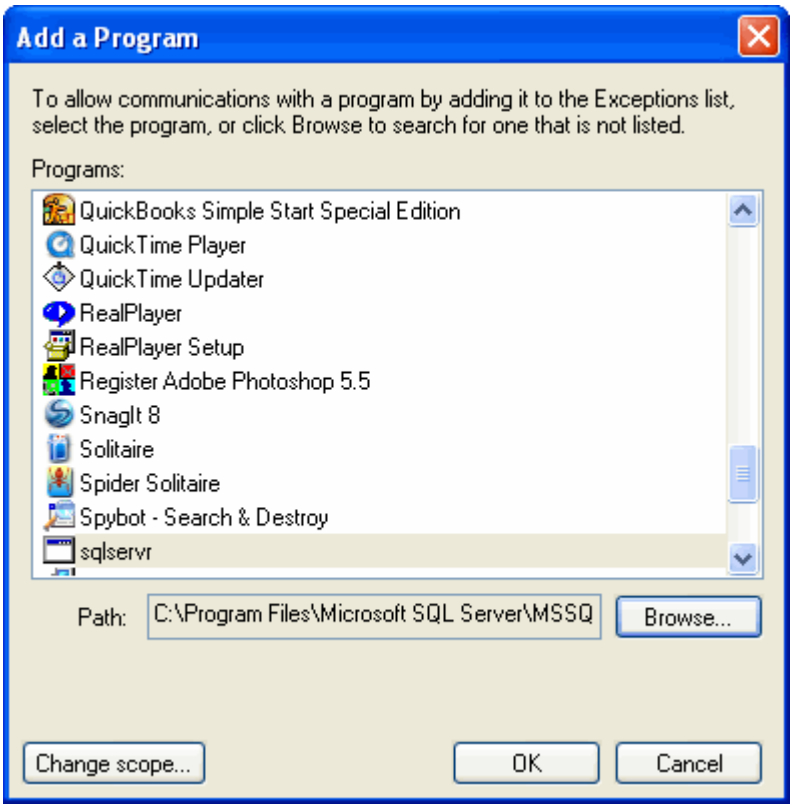


2. In the **Open** box, enter **Firewall.cpl**, and then click the **OK** button. The **Windows Firewall** window displays.



3. Click the **Exceptions** tab to select it.

4. Click the **Add Program** button to open the **Add Program** window.



5. Click the **Browse** button to open a Browse window. Use this window to locate the instance of **SQL Server** that you want to add to the **Exceptions** list. It should be located in **C:\Program Files\Microsoft SQL Server\MSSQL$ISUITE2\Bin**.
6. Click the name of the instance (**sqlserver**) and then click the **Open** button.
7. When the **Add a Program** window redisplays, make sure the name of the instance is highlighted, then click the **OK** button.
8. When the **Windows Firewall** window redisplays, make sure the instance displays under **Programs and Services**.
9. Click the checkbox next to the name of the instance to check it. Then click the **OK** button.

Enabling Programs for Client Version

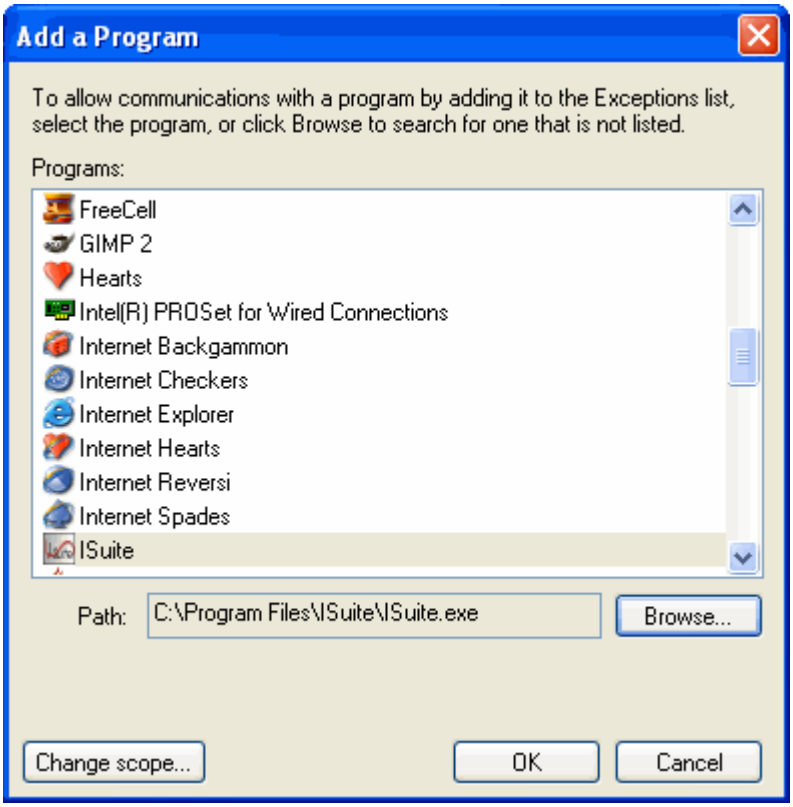
Follow the steps in this section to use **Windows Firewall** to enable programs for the client version by adding them to the **Exceptions** list.

Adding a program to the **Exception's** list, has the following advantages:

- You do not have to know a specific port number.
- The port in the **Exception's** list that the program uses will only open when the program is waiting to receive a connection.

If you later decide that you do not want the program included in the Exceptions list, uncheck the checkbox next to the program.

1. Click the Windows **Start** menu. Then click the **Run** option to open the **Run** window.
2. In the **Open** box, enter **Firewall.cpl**, and then click the **OK** button. The **Windows Firewall** window displays.
3. Click the **Exceptions** tab to select it.
4. Click the **Add Program** button to open the **Add Program** window.



5. Click the name of the program (**Isuite.exe**) and then click the **Open** button.
6. When the **Add a Program** window redisplays, make sure the name of the program is highlighted, then click the **OK** button.
7. When the **Windows Firewall** window redisplays, make sure the program displays under **Programs and Services**.
8. Click the checkbox next to the name of the program to check it. Then click the **OK** button.

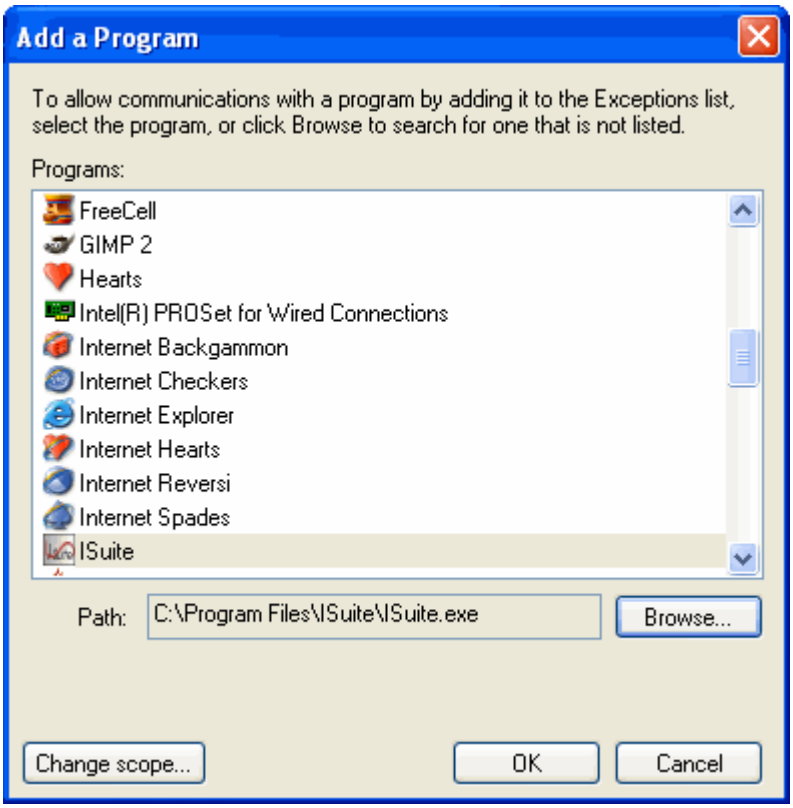
Create an Exception for SQL Server 2005 in Windows Firewall

In order for the SQL 2005 to communicate with the client machines, you must create an exception to the Windows Firewall.

These instructions apply to Microsoft SQL Server 2005 Developer Edition and Microsoft

Server 2005 Express Edition.

1. Click the Windows **Start** menu. Then click the **Run** option to open the **Run** window.
2. In the **Open** box, enter **Firewall.cpl**, and then click the **OK** button. The **Windows Firewall** window displays.
3. Click the **Exceptions** tab to select it.
4. Click the **Add Program** button to open the **Add Program** window.



5. Click the **Browse** button next to the **Path** field.
6. Navigate to the **C:\Program Files\Microsoft SQL Server\MSSQL.1\Binn** folder.
7. Click the **sqlservr.exe** program and the **Open** button.

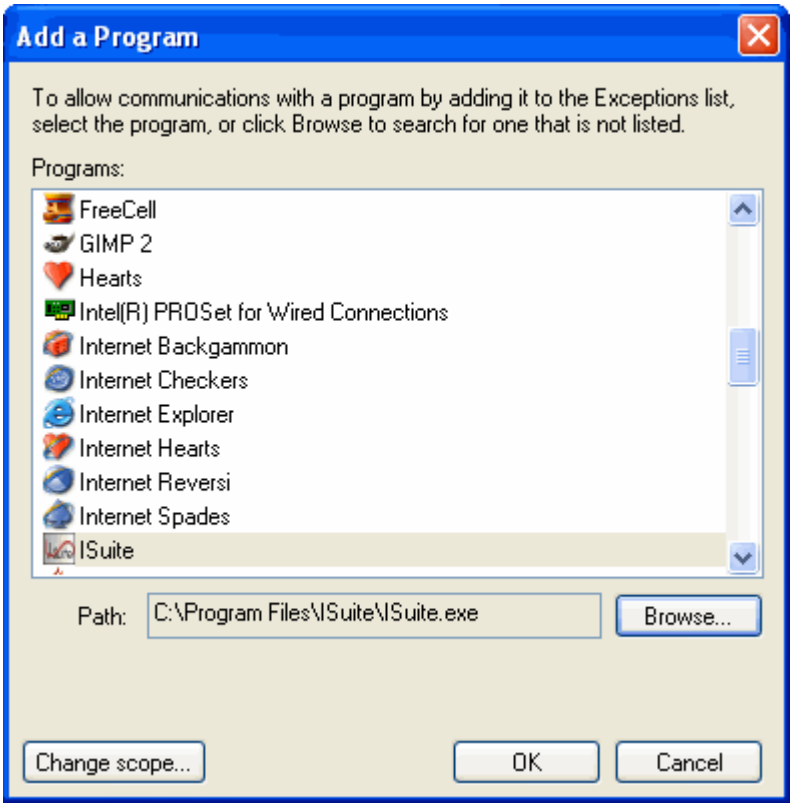
The folder in which the sqlservr.exe program is located may be different from the path listed in step 6. MSSQL.1 is a placeholder for the instance ID that you obtained in step 6. If you cannot find this program located in that directory, you may need to perform a search for the sqlservr.exe file.

8. Click the **OK** button on the **Add Program** window.
9. Repeat steps 4 - 8 for each instance of SQL SErver 2005 that needs an exception.

Create an Exception for SQL Server Browser Service

To create an exception for the SQL Server Browser service in Windows Firewall, follow these steps:

1. Click the Windows **Start** menu. Then click the **Run** option to open the **Run** window.
2. In the **Open** box, enter **Firewall.cpl**, and then click the **OK** button. The **Windows Firewall** window displays.
3. Click the **Exceptions** tab to select it.
4. Click the **Add Program** button to open the **Add Program** window.



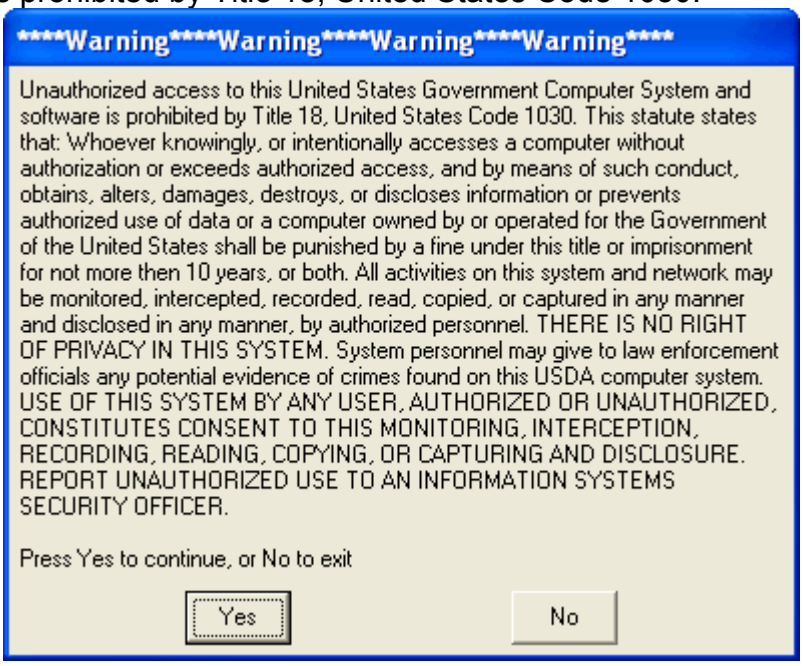
5. Click the **Browse** button next to the **Path** field.
6. Navigate to the **C:\Program Files\Microsoft SQL Server\90\Shared** folder.
7. Click the **sqlbrowser.exe** program and the **Open** button.
8. Click the **OK** button on the Add Program window.

The folder in which the sqlbrowser.exe program is located may be different from the path listed in step 6, depending on where SQL Server 2005 is installed. If you cannot find this program located in that directory, you may need to perform a search for the sqlbrowser.exe file.

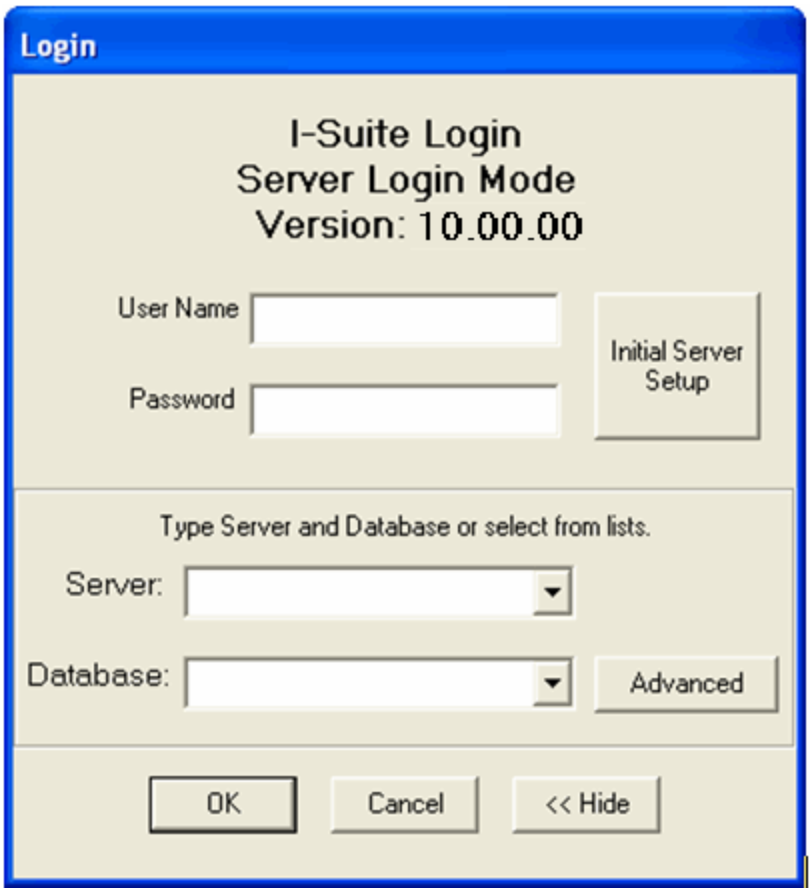
First Time Logging into I-Suite -Server

Follow the steps in this section if you are logging into the I-Suite server for the first time:

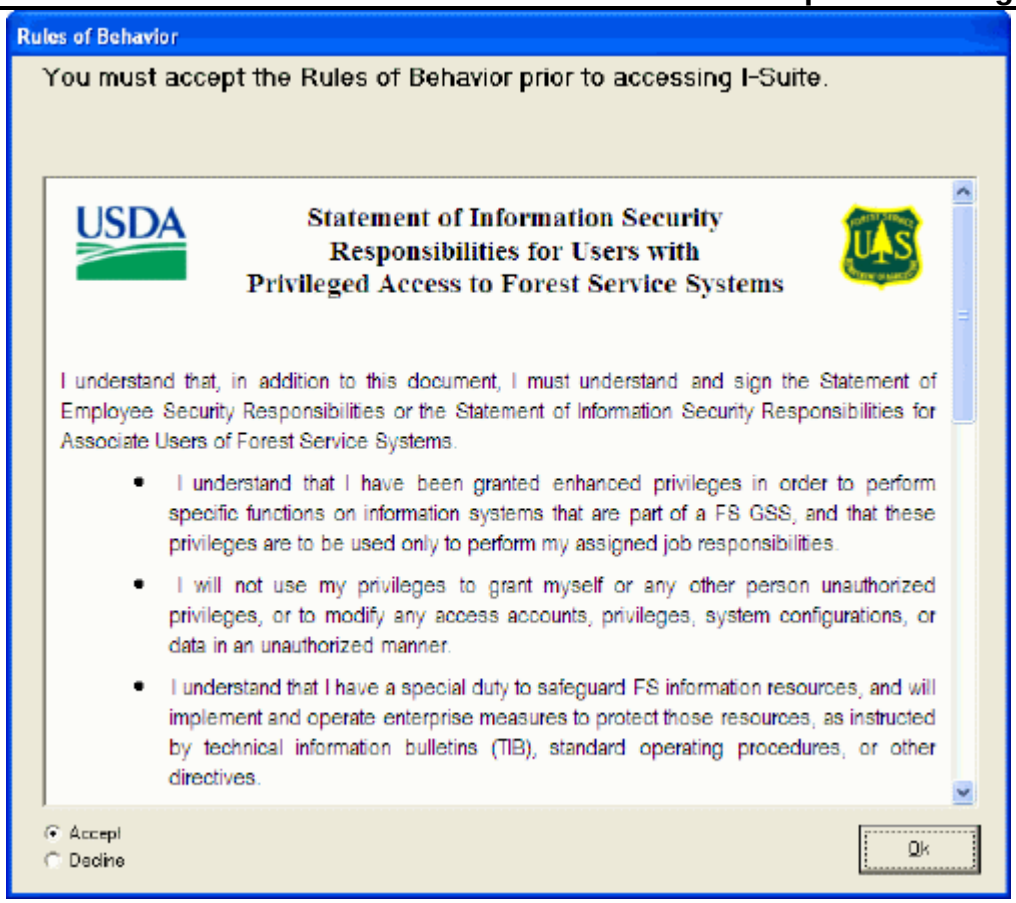
1. Launch the I-Suite application. A Security Message displays indicating that "Unauthorized access to this United States Government Computer System and software is prohibited by Title 18, United States Code 1030."



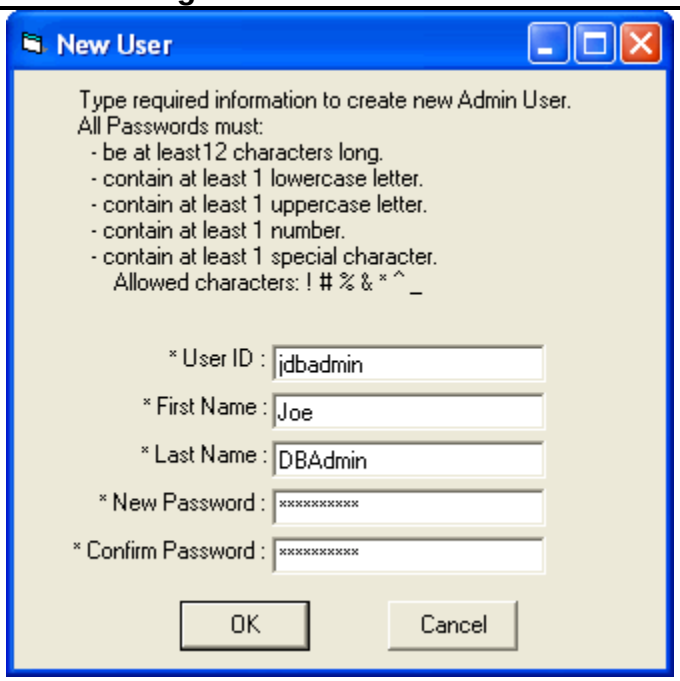
2. If you want to continue, click the **Yes** button. A **Login** window displays:



3. Leave the **User Name** and **Password** boxes blank.
4. Click the **Initial Server Setup** button. A Rules of Behavior window displays for a Privileged User Account.



5. After you have read the rules of behavior, click the **Accept** option and the **OK** button to continue. A **New User** window displays:



NOTE: After you use the **Initial Setup** button to create a user account, the button will no longer display on the **Login** window. If you cannot access the I-Suite application after the Initial Setup, either contact a user with Database Admin rights (usually the CTSP) or call the Help Desk.

6. Enter the **User ID** you want to use to log into the I-Suite system.
7. Enter your **First Name** and **Last Name**.
8. Enter a **New Password** to use to log into the I-Suite system. Use the following rules to create your password:

- The password must contain at least 12 characters.
- The password must contain at least 1 lower case letter.
- The password must contain at least 1 upper case letter.
- The password must contain at least 1 number.
- The password must contain at least 1 of the following special characters: ! # % & ^ _
- The Password cannot be a dictionary word.
- The Password cannot be one of the 24 previous passwords defined for the account.

9. In the **Confirm Password** box, enter your password a second time to make sure you entered it correctly.
10. Click the **OK** button to log into the I-Suite application.
11. After I-Suite opens, close the application. Then log into the system using your new user name and password.

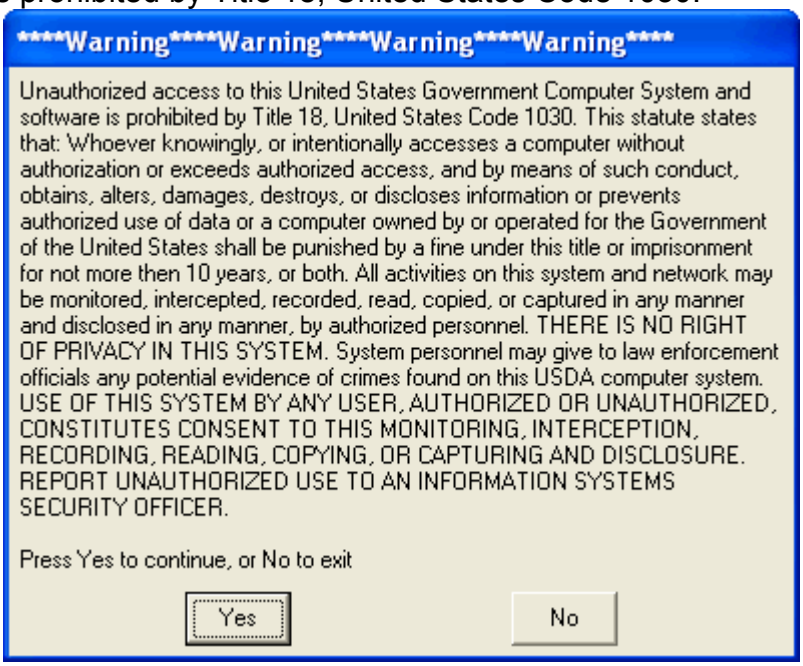
Before you can perform any functions within I-Suite, you must attach a database See "Attaching an Incident Database"Guide.

First Time Logging into I-Suite - Client

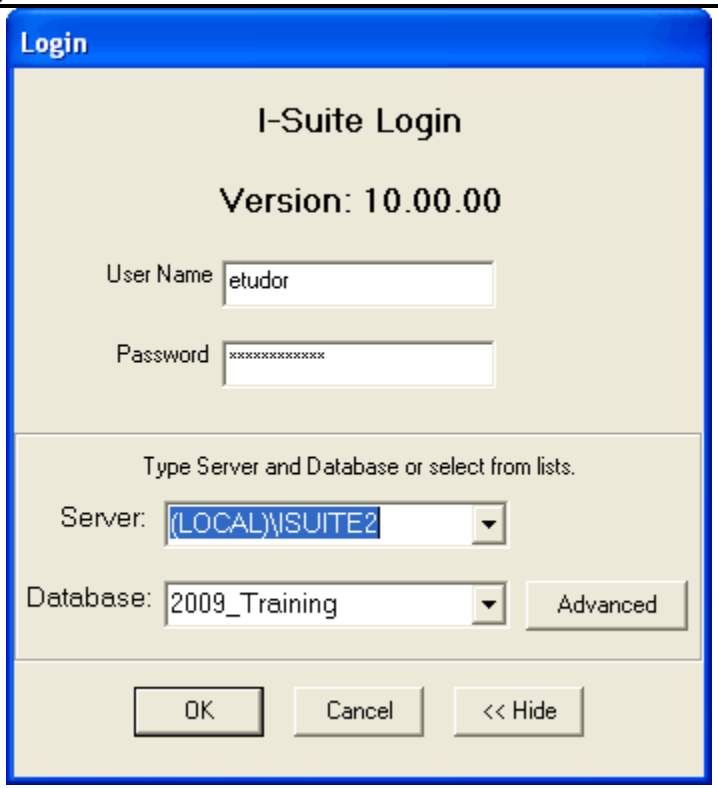
Follow the steps in this section if you are logging into the I-Suite client for the first time:

Only one login per user for each database is allowed. If you attempt to log into a database more than once with the same user name, an error message displays indicating that you are already logged into the database under that user name.

1. Launch the I-Suite application. A Security Message displays indicating that "Unauthorized access to this United States Government Computer System and software is prohibited by Title 18, United States Code 1030."



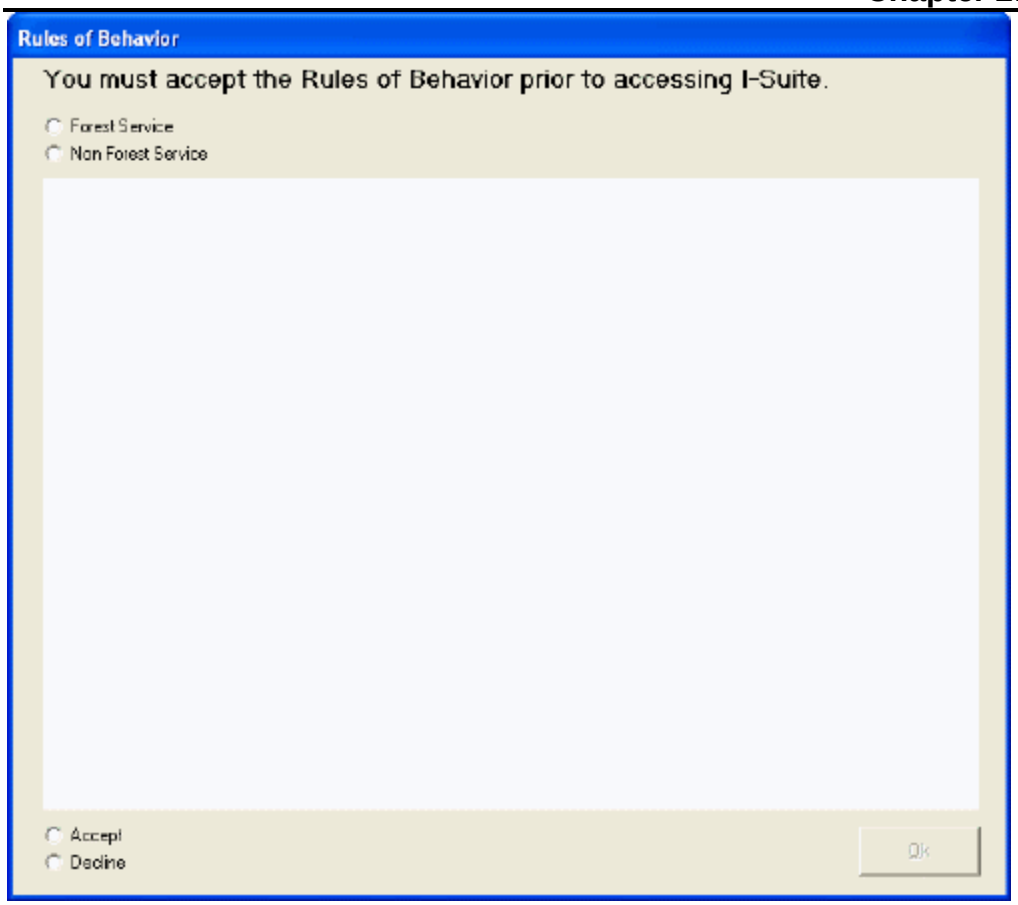
2. If you want to continue, click the **Yes** button. A **Login** window displays:



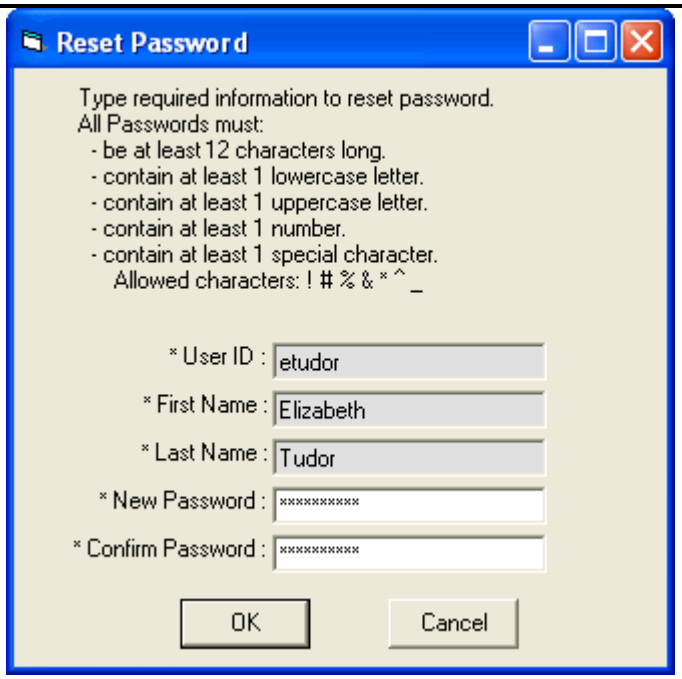
2. Enter your I-Suite **User Name**.
3. Enter your I-Suite **Password**.
4. In the **Server** box, you can either select the appropriate server from the drop-down list or type the name of the server.

If you type the name of the server in the **Server** box, you will also have to type the name of the database in the **Database** box. The system will not display any names in the **Database** drop-down list.

5. In the **Database** box, either select the name of the appropriate database from the drop-down list or type the name of the database.
6. Click the **OK** button to log into the I-Suite application.
7. When the **Rules of Behavior** window opens, indicate whether you are a **Forest Service** employee or a **Non Forest Service** employee.



8. After you have read the Forest Service or Non Forest Service Rules of Behavior, click the **Accept** option and the **OK** button to continue logging into the system.
9. When the **Reset Password** window opens, enter a **New Password** and a **Confirm Password** to change the password to your User Account. Click the **OK** button to continue logging into the system.



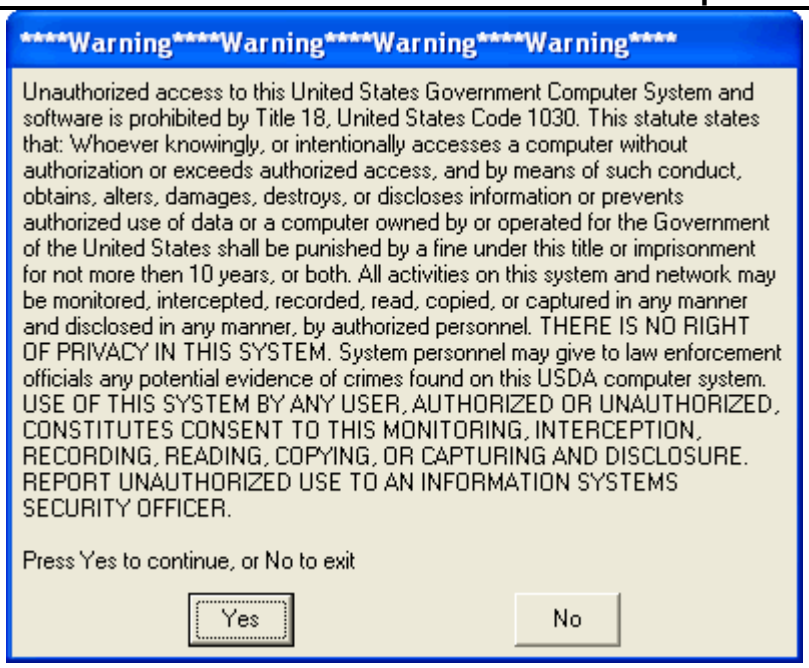
Logging in & Logging Out

Follow the instructions in this section to log into and out of the I-Suite system.

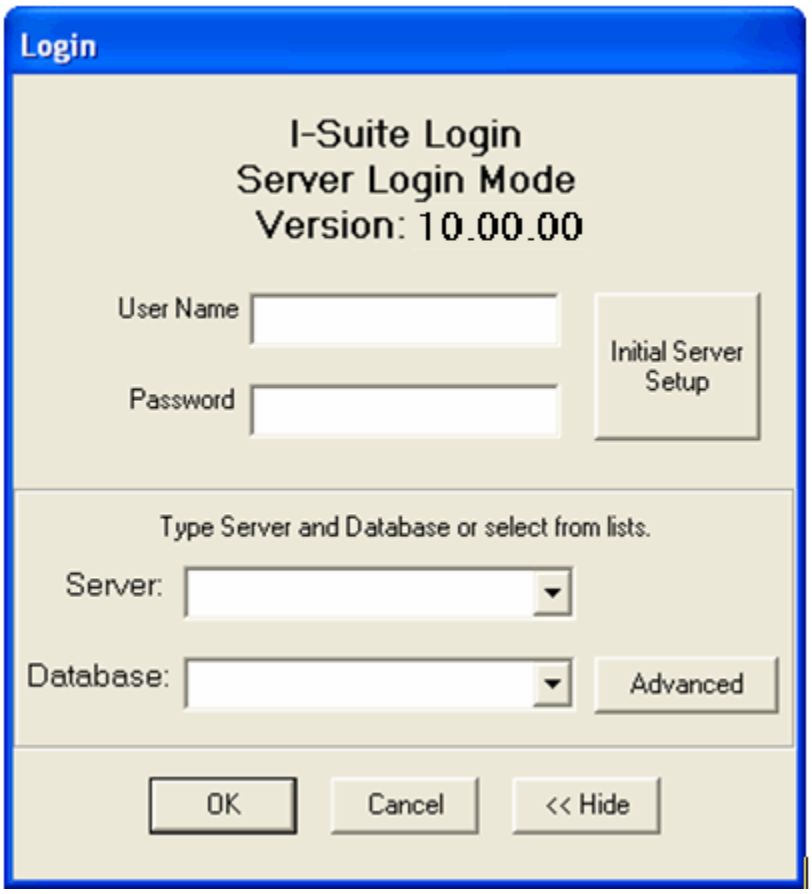
First Time Logging into I-Suite -Server

Follow the steps in this section if you are logging into the I-Suite server for the first time:

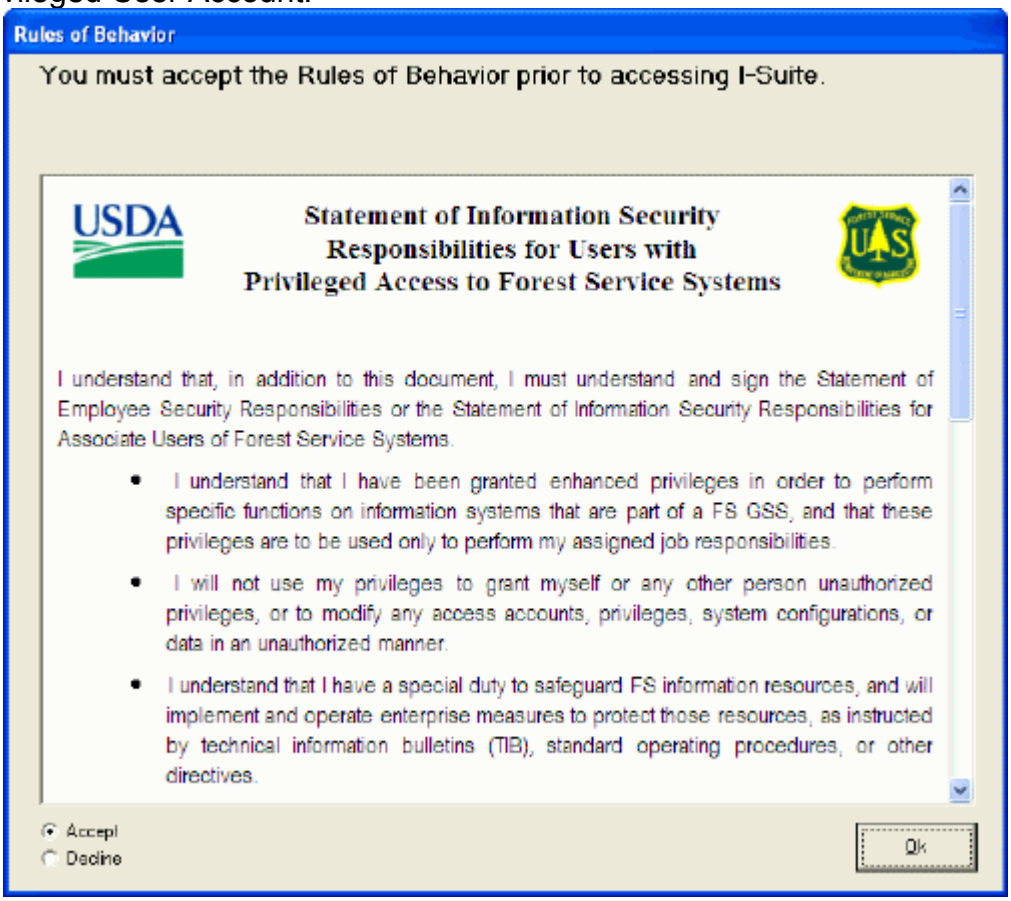
1. Launch the I-Suite application. A Security Message displays indicating that "Unauthorized access to this United States Government Computer System and software is prohibited by Title 18, United States Code 1030."



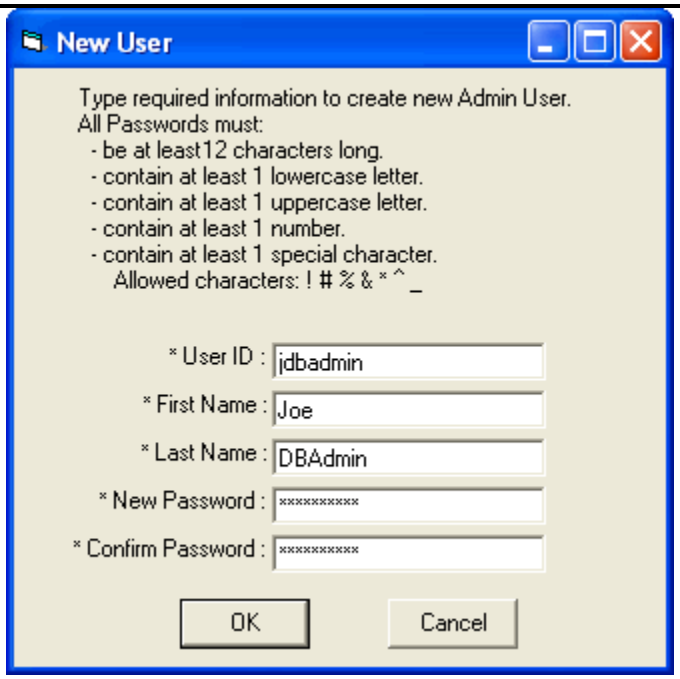
2. Click the **Yes** button to acknowledge the warning and continue with the Login process. A **Login** window displays:



3. Leave the **User Name** and **Password** boxes blank.
4. Click the **Initial Server Setup** button. A Rules of Behavior window displays for a Privileged User Account.



5. After you have read the rules of behavior, click the **Accept** option and the **OK** button to continue. A **New User** window displays:



NOTE: After you use the **Initial Server Setup** button to create a user account, the button will no longer display on the **Login** window. If you cannot access the I-Suite application after the Initial Setup, either contact a user with Database Admin rights (usually the CTSP) or call the Help Desk.

6. Enter the **User ID** you want to use to log into the I-Suite system.
7. Enter your **First Name** and **Last Name**.
8. Enter a **New Password** to use to log into the I-Suite system. Use the following rules to create your password:

- The password must contain at least 12 characters.
- The password must contain at least 1 lower case letter.
- The password must contain at least 1 upper case letter.
- The password must contain at least 1 number.
- The password must contain at least 1 of the following special characters: ! # % & ^ _
- The Password cannot be a dictionary word.
- The Password cannot be one of the 24 previous passwords defined for the account.

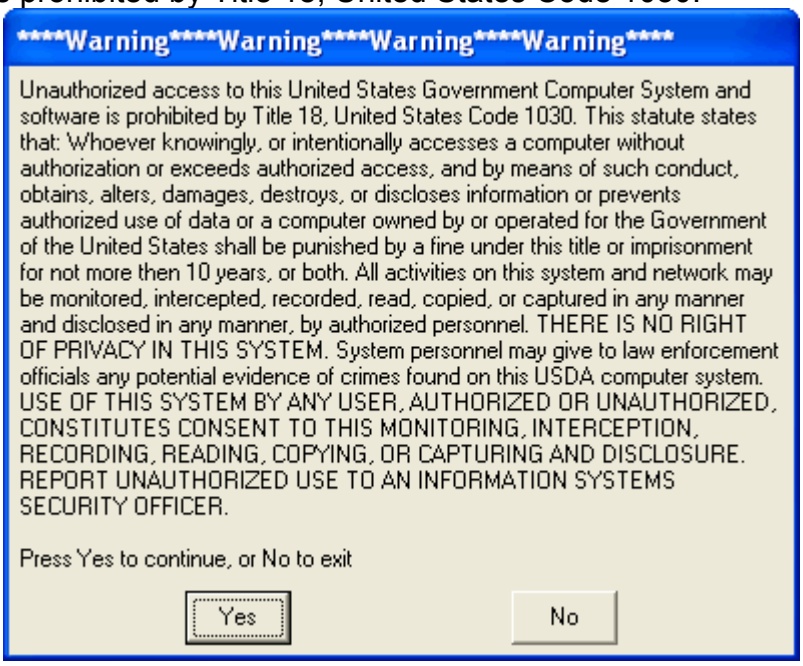
8. In the **Confirm Password** box, enter your password a second time to make sure you entered it correctly.
9. Click the **OK** button to log into the I-Suite application.
10. After I-Suite opens, close the application. Then log into the system using your new user name and password.

Before you can perform any functions within I-Suite, you must attach a database See "Attaching an Incident Database".

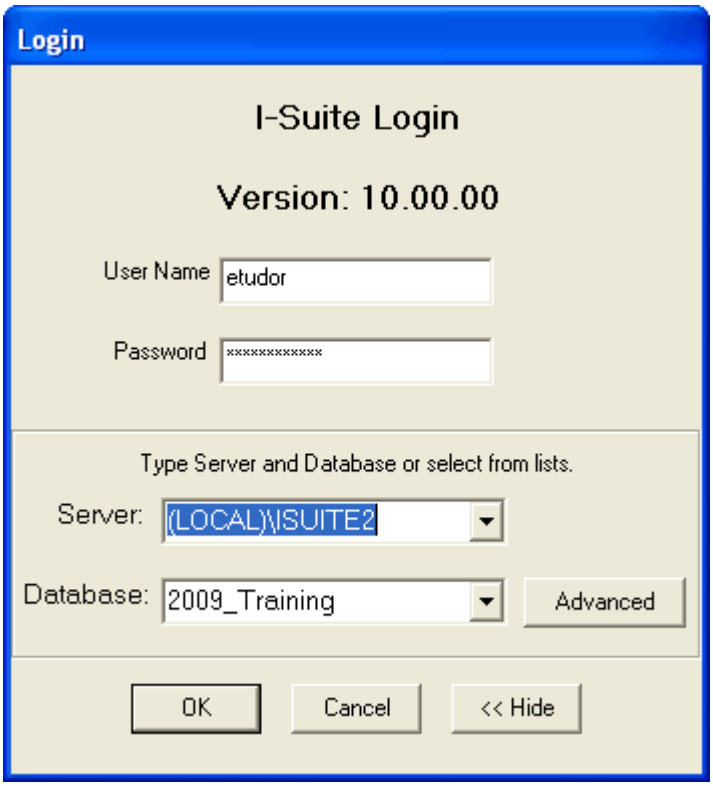
Logging into I-Suite as New User

If you are a new user in the I-Suite system, follow the steps in this section to log into the I-Suite system:

1. Launch the I-Suite application. A Security Message displays indicating that "Unauthorized access to this United States Government Computer System and software is prohibited by Title 18, United States Code 1030."



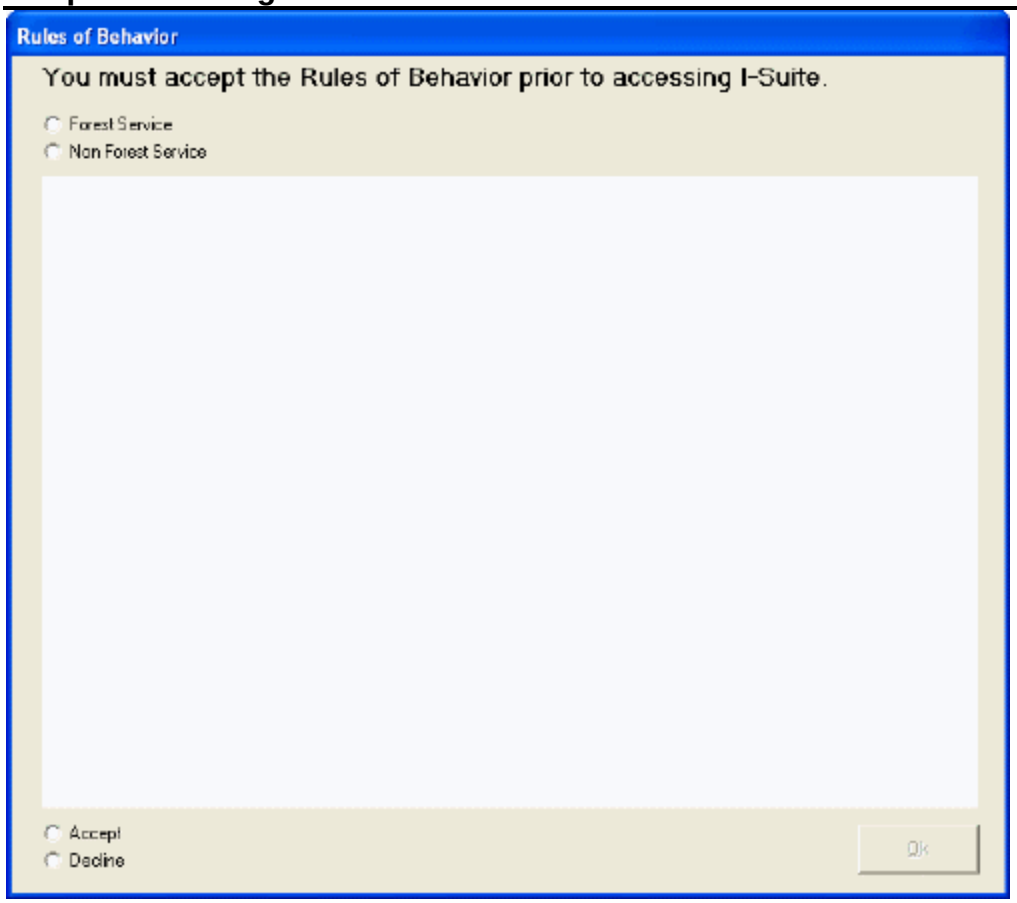
2. If you want to continue, click the **Yes** button. The **Login** window displays:



3. If needed, click the **More>>** button to display additional fields.
4. Enter your **User Name**.
5. Enter your temporary **Password**.

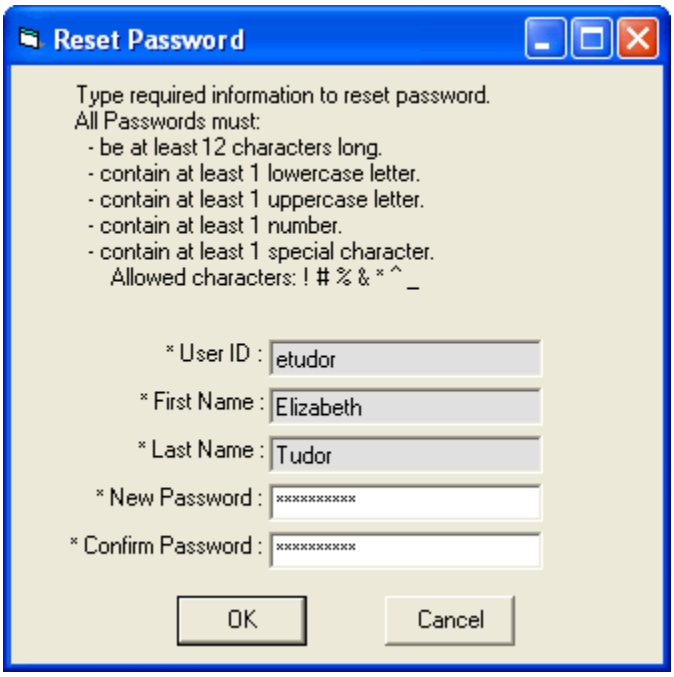
If you enter an incorrect password three consecutive times, the user account will be locked. If this occurs, contact your system administrator.

5. From the **Server** drop-down list, select the **(LOCAL)\ISUITE2Server**.
6. Click the **OK** button to log into the I-Suite application.
7. When the **Rules of Behavior** window opens, indicate whether you are a **Forest Service** employee or a **Non Forest Service** employee.



8. After you have read the Forest Service or Non Forest Service Rules of Behavior, click the **Accept** option and the **OK** button to continue logging into the system.

9. Click the **OK** button to display the **Reset Password** window:



10. In the **New Password** box, enter your new password. Use the following rules to create your password:

- The password must contain at least 12 characters.
- The password must contain at least 1 lower case letter.
- The password must contain at least 1 upper case letter.
- The password must contain at least 1 number.
- The password must contain at least 1 of the following special characters: ! # % & ^ _
- The password cannot be the same as the temporary password.
- The Password cannot be a dictionary word.
- The Password cannot be one of the 24 previous passwords defined for the account.

8. In the **Confirm Password** box, type your password a second time to make sure you entered it correctly.
9. Click the **OK** button to log into the I-Suite application.

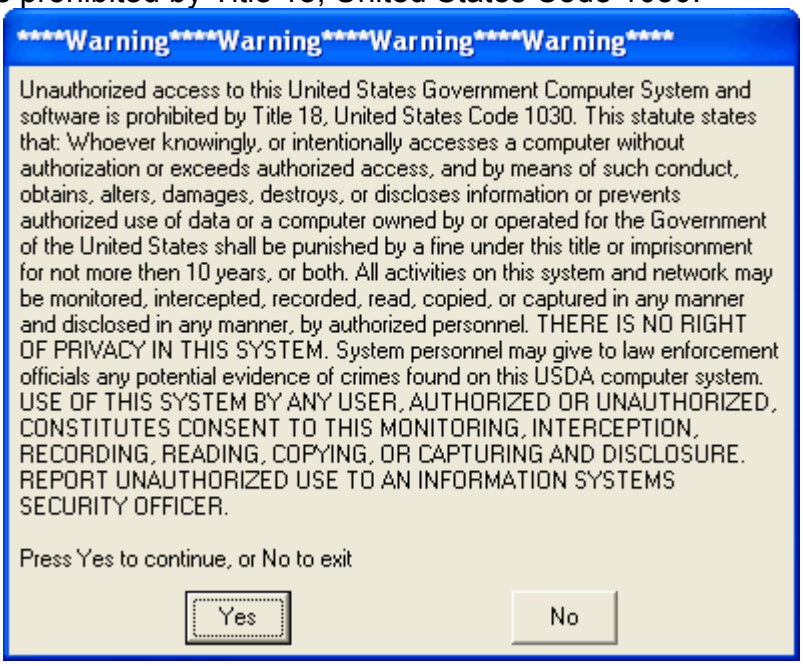
Logging into I-Suite

Follow the steps in this section to log into the I-Suite application after your login and password are defined:

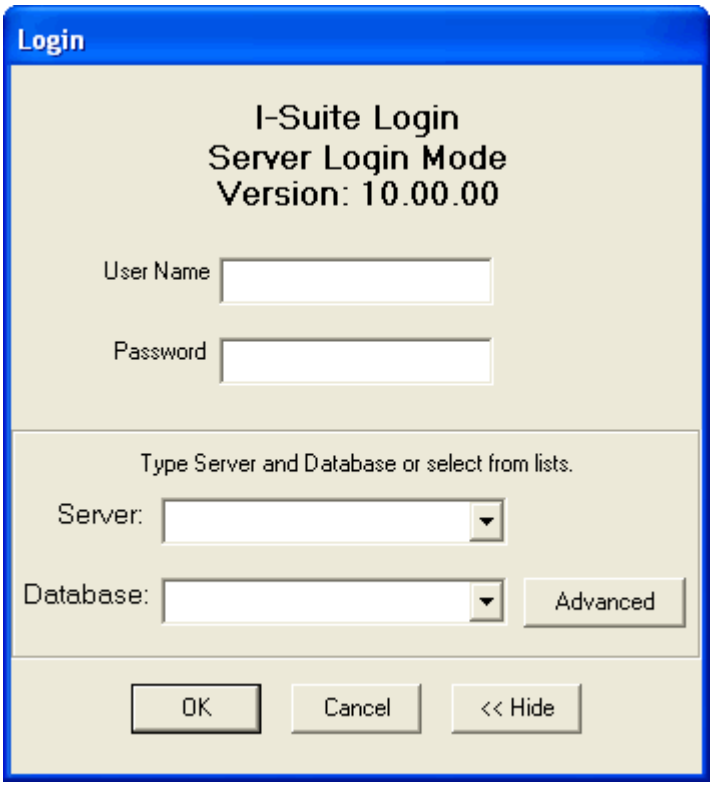
Only one login per user for each database is allowed. If you attempt to log into a database more than once with the same user name, an error message displays,indicating that you are already logged into the database under that user name.

If you attempt to login to a user account with an invalid **Password** five consecutive times, the user account will be disabled. If this occurs, you will need to contact your system administrator and ask them to enable the user account.

1. Launch the I-Suite application. A Security Message displays indicating that "Unauthorized access to this United States Government Computer System and software is prohibited by Title 18, United States Code 1030."



2. The **Login** window displays:



3. Enter your I-Suite **User Name**.
4. Enter your I-Suite **Password**.

If you enter an incorrect password three consecutive times, the user account will be locked. If this occurs, contact your system administrator.

5. Click the **OK** button to log into the I-Suite application

Passwords expire every **60** days. If the password for your user account will expire in three or less days, a message displays indicating that the password is about to expire. To change your password at that time, click the **Change Password** button. If you do not want to change your password at that time, click the **Cancel** button.

If the password for your user account has expired, a message displays indicating that your password has expired. When you click the **OK** button, the **Reset Password** window opens. You must define a new password before you can access the I-Suite system.

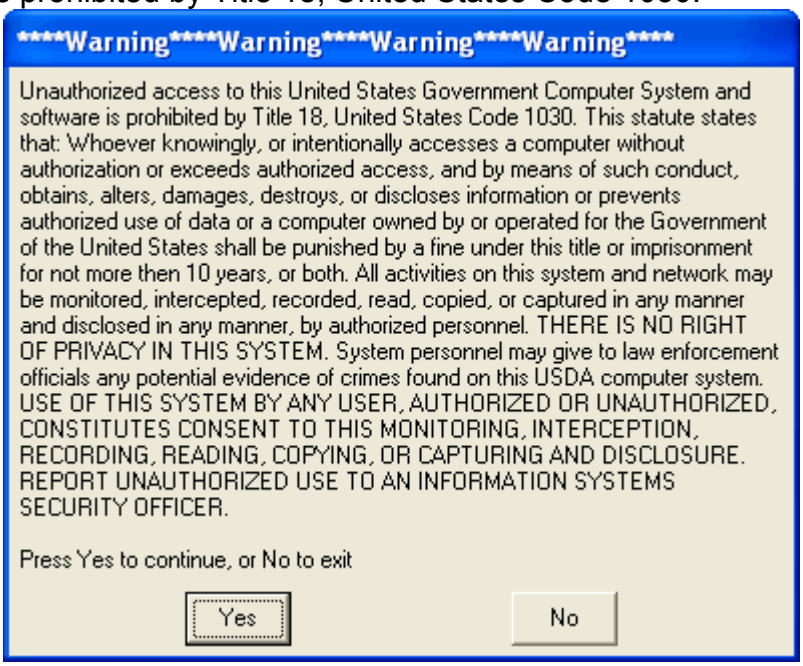
Logging into I-Suite After Your Password is Reset

Follow the steps in this section to log into I-Suite after your password is reset:

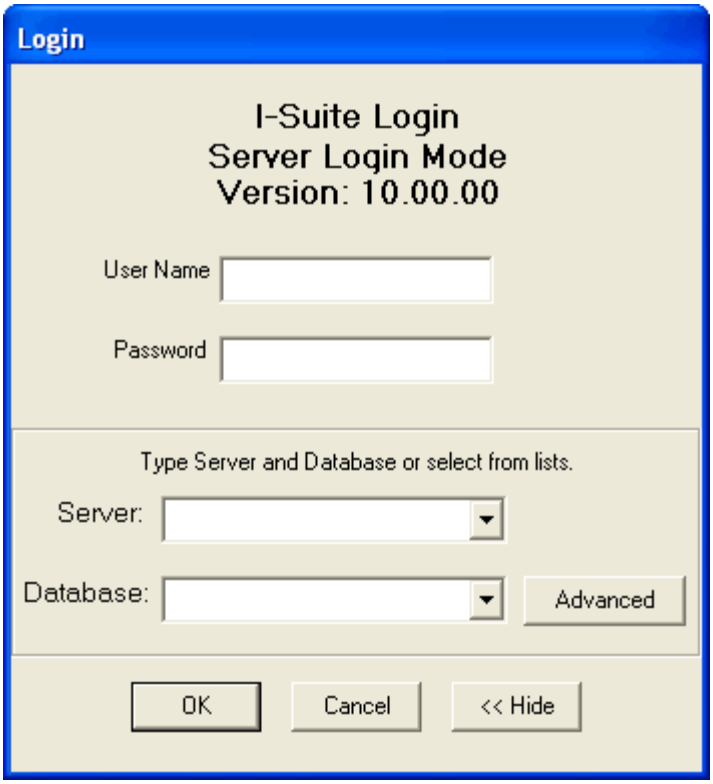
Occasionally, the DB Admin may need to reset your password. When this occurs, the

DB Admin will give you a temporary password to use the next time you log into I-Suite. You will then need to create a new password to complete the log in process.

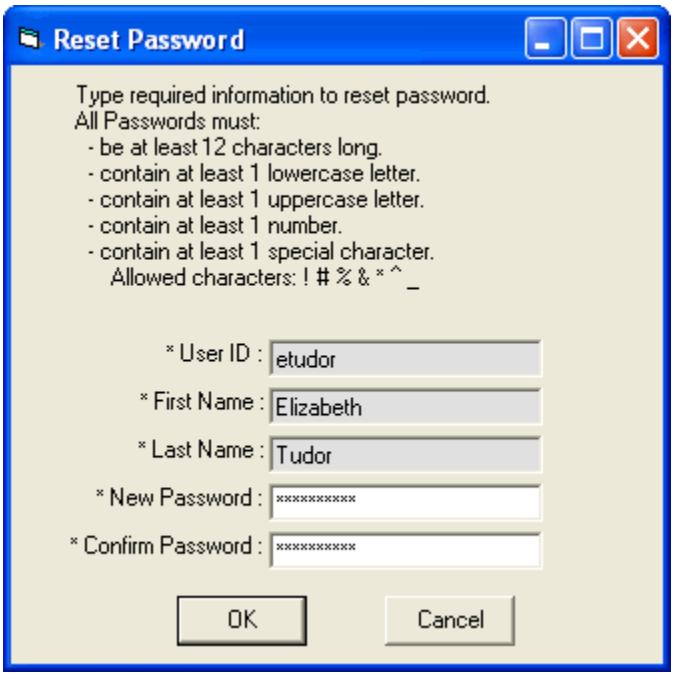
1. Launch the I-Suite application. A Security Message displays indicating that "Unauthorized access to this United States Government Computer System and software is prohibited by Title 18, United States Code 1030."



2. Launch the I-Suite application. The **Login** window displays.



3. Enter your **User Name** and temporary **Password**. Then click the **OK** button. The **Reset Password** window displays.



4. In the **New Password** box, enter your new password. Use the following rules to create your password:

- The password must contain at least 12 characters.
- The password must contain at least 1 lower case letter.
- The password must contain at least 1 upper case letter.
- The password must contain at least 1 number.
- The password must contain at least 1 of the following special characters: ! # % & ^ _
- The password cannot be the same as the temporary password.
- The Password cannot be a dictionary word.
- The Password cannot be one of the 24 previous passwords defined for the account.

4. In the **Confirm Password** box, enter the password a second time to make sure it was entered correctly.
5. Click the **OK** button to reset your password.

Logging Out of I-Suite

From the **File** menu, select the **Exit** option.

Common Features

This section describes some of the features that are common to all areas of the I-Suite system:
Injury/Illness

Menus

The following drop-down menus display at the top of the I-Suite windows:

File Menu
The following options are available in the **File** menu in all modules:

- **Open Database** - Opens an incident database in I-Suite.
- **Print** - Prints the grid in the open module or a report selected on the Reports window.

The **Print** option is not available in the Database Admin module.

- **Refresh Data** - Refreshes the data on your window.
- **Exit** - Closes the I-Suite application.

The following options are available in the **File** menu when the **IAP** module is open:

- **New Form** - Creates a new form.
- **Close Form** - Closes an open form.
- **Save** - Saves a form.
- **Save All** - Saves all open forms.
- **Export** - Exports a form to a PDF file.
- **Export Plan** - Exports an entire plan to a PDF file.
- **Print Preview** - Previews the form.
- **Print Preview Plan** - Previews an entire plan.
- **Print Current Form** - Prints the current form that is open.
- **Print Plan** - Prints an entire plan.

Modules Menu
The following options are available in the **Modules** menu:

- **Database Admin** - Opens the Database Admin Module.
- **Data Admin** - Opens the Data Admin Module.
- **Resources** - Opens the Resources Module.
- **Cost** - Opens the Cost Module.
- **Supply** - Opens the Supply Module.
- **IAP** - Opens the Incident Action Plan Module.
- **Demob** - Opens the Demob Module.
- **Time** - Opens the Time Module.
- **Injury/Illness** - Opens the Injury/Illness Module.

Filters Menu
Select an option from the **Filters** drop-down menu to filter the **Resources** grid by:

- Aircraft
- Crews
- Equipment
- Overhead
- All
- All Personnel

The **Filters** menu displays in all modules except IAP.

Reports Menu
Select an option from the **Reports** menu to print the following types of reports:

- Cost Reports
- Demob Reports
- Plans Reports
- Supply Reports

- Time Reports
- Custom Reports
- Injury/Illness Reports

Tools Menu
The following options are available in the **Tools** menu in all modules:

- **Options** - Define the settings for the different modules in I-Suite.

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

- **Quick Stats** - Quickly view Stats in the I-Suite system.
- **Change Password** - Change your I-Suite password.

The following options are available in the **Tools** menu when the **IAP** module is open:

- **Copy Form** - Copies an existing form to create a new one.
- **Copy Plan** - Copies an existing plan to create a new one.
- **Spell Check** - Spell checks a form.
- **Form 203 Template** - Defines the template for the ICS 203 form.
- **Form 204 Template** - Defines the template for the ICS 204 form.
- **Final** - Finalizes a form.
- **Master Frequency** - Creates a Master Frequency List.

Help Menu
The following options are available in the **Help** menu:

- **I-Suite Help** - Opens Help information for the I-Suite application.
- **About** - Displays version information for I-Suite.
- **Support** - Displays contact information for the HelpDesk.

Time Menu
The **Time** menu only displays when you are in the **Time** module. The following options are available in this menu:

- **Admin Office For Payment** - Adds administrative office information to I-Suite.
- **Contractor** - Adds contractors and agreements to I-Suite.

Cost Menu
The **Cost** menu only displays when you are in the **Cost** module. The following options are available in this menu:

- **Acres Burned** - Defines acres burned information.

- **Cost Analysis Benchmark Setup** - Sets up the data to use in the Cost Analysis Report you can print on the Cost Report window.
- **Divisions** - Defines a division for Cost Apportionment purposes.
- **Graphs** - Creates standard or custom Cost Graphs.
- **Accruals** - Creates an Accrual Extract.
- **Projections** - Creates Cost Projections.
- **Rates** - Defines Rate Areas and Rates.

Edit Menu
The **Edit** menu only displays when you are in the IAP Module. The following options are available in this menu:

- **Copy** - Copies a form.
- **Cut** - Cuts text that is highlighted in a form.
- **Paste** - Pastes text that was cut or copied into a form.
- **Delete Form** - Deletes a form.
- **Format** - Changes the font style.

View Menu
The **View** menu only displays when you are in the IAP module. The following options are available in this menu:

- **Form** - Displays all forms in the Tree View.
- **Individual Form** - Displays only specific forms in the Tree View.
- **Plan** - Displays plans in the Tree View.

Shifts Menu
The **Shifts** menu only displays when you are in the IAP module. The following options are available in this menu:

- **Define Shifts** - Adds shifts to IAP.

Window Menu
The **Window** menu only displays when you are in the IAP module. This menu contains a list of the forms that are currently open. Select a listed form, to make that the active form in the window. Select the **Close All Forms** option to close all forms that are open.

Supply Menu
The **Supply** menu only displays when you are in the Supply Module. The following options are available in this menu:

- **Release (Permanent)** - Permanently releases supply items to another location, such as a cache or another incident.
- **Add/Edit Location** - Adds or edits a location.
- **Add/Edit Supply Items** - Adds or edits a Supply item.

- **Transfer (At Incident)** - Transfers a Supply item from one resource to another
- **Import Shipment** --Import Supply shipment.
- **Inventory** - Allows the user to manually change inventory counts.

Toolbars

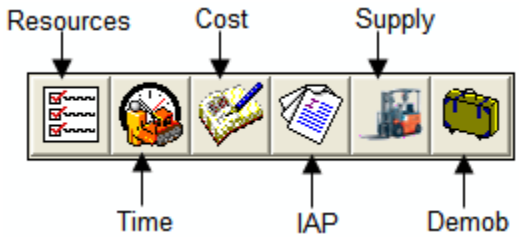
The following toolbars display at the top of the I-Suite windows:

Main Toolbar

The Main toolbar contains two separate types of buttons:

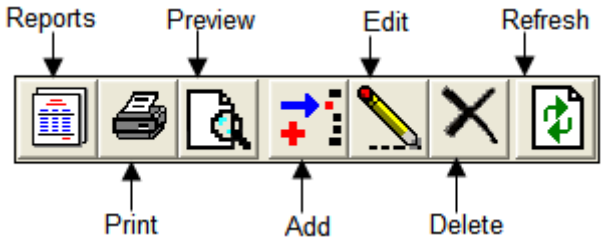
Module Buttons

The Module buttons open modules in the I-Suite system. These buttons are located on the left side of the Main toolbar. The following example identifies the buttons and the modules that they open:



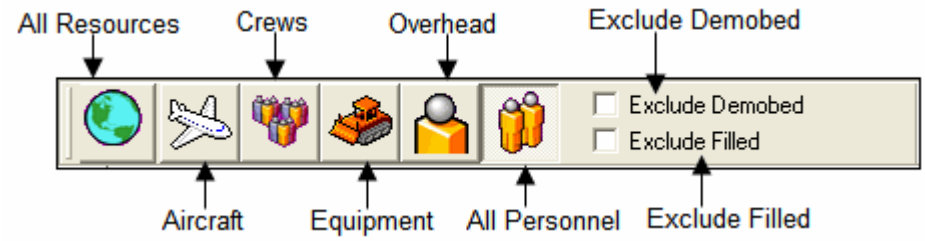
Action Buttons

The Action buttons perform an action in one of the I-Suite modules. These buttons are located on the right side of the Main toolbar. The following example identifies the buttons and the action that occurs:



Filter Toolbar

The **Filter** toolbar displays beneath the **Main** toolbar. Click the buttons in this toolbar to filter the information in the **Resources** grid. The following example identifies the buttons in this toolbar and the resources that display in the grid when you click the buttons:



When the **Demob** module is open, a **Demobed Only** checkbox displays beneath the **Exclude Filled** checkbox. This option only displays in the **Demob** module.

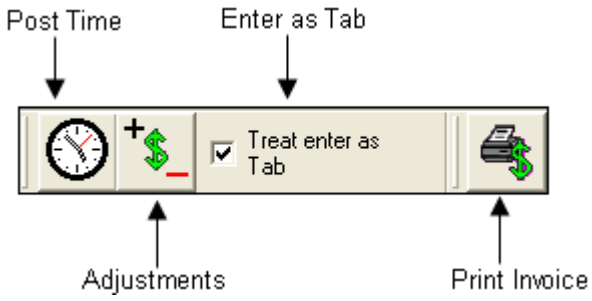
Resources Toolbar

The **Print T-Card Labels** button displays to the right of the **Filter** toolbar when you are in the **Resources** module. Click this button to print T-Card Labels. The following is an example of this button:

The **Group Check-In** and **No Grouping** buttons display to the right of the **Print T-Card Labels** button when you are in the Resources module. Click the **C** button to open the Manage Resources window and select the users to check-in as a group. Click the **N** button to turn off the grouping option.

Time Toolbar

The **Time** toolbar displays to the right of the **Filter** toolbar when you are in the **Time** module. The following example identifies the buttons in this toolbar:

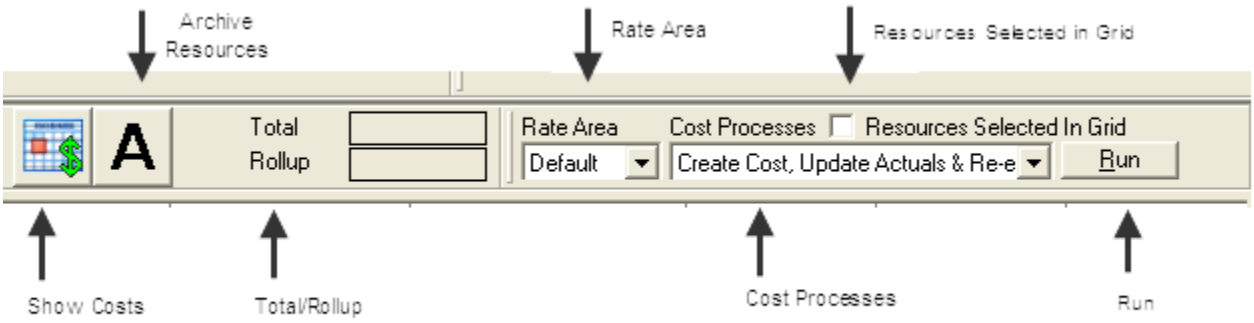


- **Post Time** - Post time for a resource.

- **Adjustments** - Make adjustments to the time for items such as Quarters and Lodging, Meals, Travel, etc.
- **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.
- **Print Invoice** - Print either an OF 288 or an OF 286, depending on the resource you have selected.

Cost Toolbar

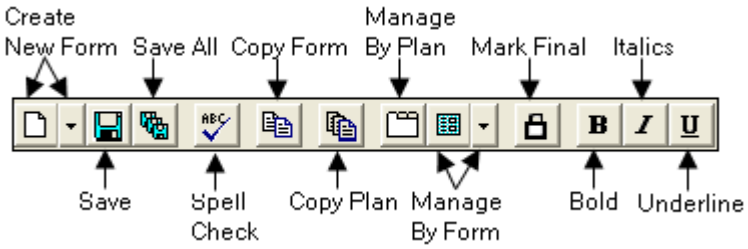
The **Cost** toolbar displays to the right of the **Filter** toolbar when you are in the **Cost** module. The following example identifies the buttons and options in this toolbar:



- **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.
- **Archive Resources** - Click this button to archive resources, so they are not included when Cost Processes are run.
- **Total** - When this option is checked, the total cost displays for the selected resource, as well as any rollup costs.
- **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 system changes (flows-down) the information in all of the Daily records below it that are not locked.
- **Rate Area** - To use a rate area other than the Default Standard rate area, select the appropriate rate area from this drop-down list.
- **Cost Processes** - Select a process from this drop-down list and click the **Run** button to run that process.
- **Resources Selected in Grid** - When this checkbox is checked, you can run Cost Processes for one or more resources selected in the grid.
- **Run** - Click this button after you have selected a **Cost Process** to run that process.

IAP Toolbar

The **IAP** toolbar displays beneath the **Main** toolbar when you are in the **Incident Action Plan** module. The following example identifies the buttons in this toolbar:



- **Create New Form** - Displays a list from which you can select the form you want to create.
- **Save** - Saves the form.
- **Save All** - Saves all open forms.
- **Spell Check** - Checks the form for spelling errors.
- **Copy Form** - Displays a list of forms you can copy.
- **Copy Plan** - Displays a list of plans you can copy.
- **Manage By Plan** - Displays all forms grouped by an Incident Action Plan.
- **Manage By Form** - Displays all forms grouped by form number. You can also use this button to only display a certain type of form.
- **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**.
- **Bold** - Bolds text selected in a form.
- **Italic** - Italicizes text selected in a form.
- **Underline** - Underlines text selected in a form.

Supply Toolbar

The **Supply** toolbar displays to the right of the **Filter** toolbar when you are in the **Supply** module. The following example identifies the buttons in this toolbar:

- **Issue** - Issue supply items.
- **Issue Returns** - Return supplies issued to a resource or location.
- **Receive** - Receive supply items.
- **Import Shipment** -- Import supply shipment
- **View History** - View a history of supply items that were issued.
- **Add/Edit Location** - Add or edit locations that are either internal or external to the incident.
- **Add Supply Item** - Add items to the Supply list.

- **Incident Card -- Links supply card to a resource**
- **Issue Report** -- Report of currently assigned supplies

Demob Toolbar

The **Demob** toolbar displays to the right of the **Filter** toolbar when you are in the **Demob** module. The following example identifies the buttons in this toolbar.

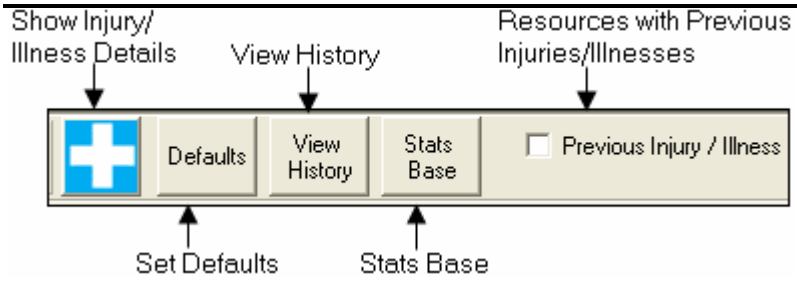
- **P** Button - Click a group of resources in the grid. Then click the **P** button to change the status of the selected group to **Pending**. .
- **D** Button - Click a group of resources in the grid. Then click the **D** button to change the status of the selected group to **Demobed**.

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. When you click the **Save & Next** button, the changes are saved and the next selected record displays.

- **N** Button - 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.
- **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
- **Resources Selected in Grid** - When this checkbox is checked and you click a Report Button, the report is generated for the resource selected in the grid.

Injury/Illness Toolbar

The **Injury/Illness** toolbar displays to the right of the **Filter** toolbar when you are in the **Injury/Illness** module. The following example identifies the buttons in this toolbar.



- **Show Injury/Illness Details** - Display the Manage Injury/Illness area.
- **Defaults** - Set defaults for the Injury/Illness module.
- **View History** - View a history of injuries and illnesses.
- **Stats Base** - Define statistics to use in the Injuries and Frequency report.
- **Previous Injury/Illness** - Only display resources with previous injury or illness records in the grid.

Accessing Help

This section explains how to access I-Suite help information. There are several methods you can use to receive Help for the I Suite Application:

I-Suite Application Help

Help is available within the I-Suite application. To access the I-Suite Application Help:

1. Select the **Help** drop-down menu at the top of any I-Suite window.
2. When the sub-menu displays, select the **I-Suite Help** option.

For additional help, contact the **I-Suite Help Desk** at **(866) 224-7677**.

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

I-Suite Website

The I-Suite Website (**http://isuite.nwcg.gov**) contains a wide variety of I-Suite documentation, downloads and updates, including:

- **Software Downloads** - Click the **Download** link to access software downloads.
- **Updates** - Click the **Download** link to access software updates.
- **User Guides** - Click the **User Support** link to access User Guides. These guides display in a PDF format.
- **Quick Reference Cards** - Click the **User Support** link to access Quick Reference Cards in a PDF format.

- **Training Material** - Click the **Training** link to access Training Material. The Training Manuals display in a PDF format.

When viewing a PDF file in Adobe Acrobat, you can use the **File/Save As** option to save the file to your computer.

To access other online help on the **isuite.nwcg.gov** web site, click the **Bugs & Tips** option to open the Bugs & Tips Web page.

General Instructions

This section contains general instructions for using the I-Suite system.

Security

Make sure private information is kept confidential. Private information includes Social Security Numbers (SSNs) and IRS Federal Employer Tax ID Numbers (EINs),

For more information about clearing out SSNs and EINs, see See "Purging Social Security Numbers". For information about changing your password, see See "Changing I-Suite User Password".

Opening an I-Suite Module

1. Click the **Modules** menu at the top of the window.
2. Click a module listed in the **Modules** menu to open it.

You can also click a module button in the toolbar at the top of the I-Suite window to open the module.

Managing All Incidents as One

If you want to manage all of the incidents as if they were one, follow these steps:

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

When the **Manage All Incidents as One** option is selected and you are adding a resource, an **Incident Name** drop-down list is available on the **Manage Resource - Add Mode** window. Verify that the correct **Incident Name** and **Account Code** are

selected for the new resource.

Managing Incidents Separately

If you want to manage all incidents separately, follow these steps:

1. At the top of the I-Suite window, click to uncheck the **Manage All Incidents As One** checkbox, if it was selected.
2. From the **Incident** drop-down list, select the appropriate incident.

When managing incidents separately, verify that the correct incident displays in the Incident box at the top of the Main I-Suite window.

I-Suite Module Descriptions

This section describes the primary purposes of each of the I-Suite modules:

The modules you can access in I-Suite depend on the permissions assigned to the you in the I-Suite system.

Database Admin

You can perform the following functions in the Database Admin module:

- See "Creating a New Blank Database"
- See "Copying an Incident Database"
- See "Renaming an Incident Database"
- See "Attaching an Incident Database"
- See "Detaching an Incident Database"
- See "Manually Backing Up the Incident Database"
- See "Automatically Backing Up the Incident Database"
- See "Restoring the Backup Database"
- See "Managing Users and Passwords"
- See "Importing ROSS Data Files"
- See "Purging Social Security Numbers"
- See "Exporting I-Suite Data Files"
- See "External User Account Management"
- See "Merging Databases"

Data Admin

You can perform the following functions in the Data Admin module:

- See "Adding Incident Data"
- See "Managing Accounting Codes"
- See "Manage Lookup Tables"

Resources

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.

You can perform the following functions in the Resources module:

- See "Managing Data and Resources"
- See "Editing Common Data"
- See "Rostering a Resource "
- See "Creating a Strike Team/Task Force Parent Record"
- See "Printing Plans Reports"

Demob

The primary purpose of the Demob module is to assist in pre-planing and demobilization of resources. You can perform the following functions in the Demob module:

- See "Selecting Demob Checkout Options"
- See "Selecting Travel Questions for Demob"
- See "Defining Demobilization Information for a Resource"
- See "Defining Tentative Release Information "
- See "Defining Actual Release Information "

Incident Action Plan (IAP)

IAP uses the data in the I-Suite database to produce the Incident Action Plan for the incident. You can perform the following functions in the IAP module:

- See "Defining Master Frequency List"
- See "Defining Shifts"
- See "Creating an ICS-202 (Incident Objectives)"
- See "Creating an ICS 203 (Organization Assignment List)"
- See "Creating an ICS 205 (Incident Radio Communications Plan)"
- See "Creating an ICS 204 (Division Assignment List)"
- See "Creating an ICS 206 (Medical Plan)"

- See "Creating an ICS 220 (Air Operations Summary)"

Time

The primary purpose of the Time module is to track time and create pay documents, including the Emergency FireFighter Time Report (OF-288) and the Emergency Equipment Use Invoice (OF-286). You can perform the following functions in the **Time** module:

- See "Posting Personnel Time"
- See "Posting Crew Time"
- See "Posting Contracted Time"
- See "Posting Time Adjustments"
- See "Printing an Emergency Fire Fighter Time Report (OF 288)"
- See "Printing Emergency Equip Invoice/Itemized Deductions Report (OF-286)"
- See "Printing Time Reports"

Cost

The primary purpose of the Cost module is to track costs for individual resources. The system creates an estimated cost record 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.

You can perform the following functions in the Cost module:

- See "Creating Cost and Updating with Actuals"
- See "Showing Daily Detail"
- See "Adding Rates to an Area Other Than Default Standard"
- See "Defining Acres Burned"
- See "Cost Share Apportionment"
- See "Creating a Cost Projection"
- See "Generating Pre-Designed Cost Graphs"
- See "Creating an Accrual Extract"
- See "Cost Reports"

Custom Reports

The primary purpose of Custom Reports is to use I-Suite data to create reports that are not available in the Standard Reports. Use the following options to create Custom Reports:

- See "Report Designer"
- See "Advanced Designer"
- See "Manage Saved Reports"

Supply

The primary purpose of the Supply module is to track supply items at an incident. You can perform the following functions in the Supply module:

- See "Issue Supply Items"
- See "Issue Returns"
- See "Receive Supply Items"

Injury/Illness

The primary purpose of the Injury/Illness module is to track injuries and illnesses that occur on an incident. You can perform the following functions in the Injury/Illness module:

- See "Adding an Injury/Illness"
- See "Editing an Injury/Illness"
- See "Deleting Injury/Illness"
- See "Injury/Illness Reports"
- See "View History"
- See "Stats Base"
- See "Injury/Illness Reports"
-

Working with Grids

Resource information in I-Suite displays in grids. There are several different ways you can filter information in the grids. This section identifies all of the methods you can use.

Filter Buttons

Click the following buttons in the **Filter** toolbar to only display the identified types of resources:

All Resources
Click this button to display all of the resources in the grid.

Aircraft
Click this button to display only aircraft resources in the grid.

Crew
Click this button to only display crew resources in the grid.

Equipment
Click this button to only display equipment resources in the grid.

Overhead
Click this button to only display overhead resources in the grid.

All Personnel
Click this button to display all personnel resources in the grid.

The **Add** and **Edit** buttons are disabled when the **All Personnel** filter is selected.

The **All Personnel** filter is not available in the Cost module.

Exclude Demobed

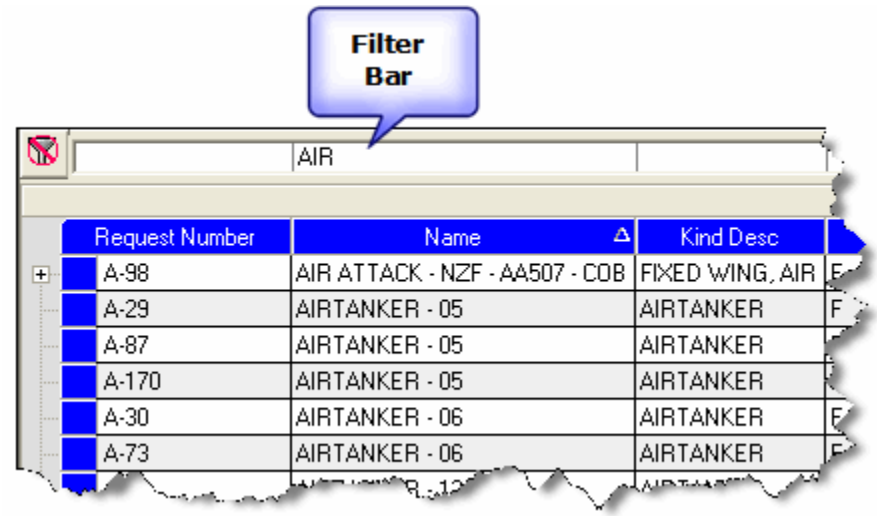
To remove resources that were already demobilized from the grid, click to check the **Exclude Demobed** checkbox.

Exclude Filled

To remove resources with a Filled status from the grid, click to check the **Exclude Filled** checkbox.

Filter Bar

A **Filter Bar** is located directly above the grid. Each of the empty boxes in the filter bar corresponds to headings in the grid. If you type a term in a filter box, I-Suite only displays those resources that match the filter term. For example, if you enter **AIR** above the **NAME** column in the grid, only those resources with names that begin with **AIR** display in the grid.



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.

% Wildcards
You can use the **%** wildcard to filter the grid based on a word within the column you are filtering. For example, enter **%Tanker** in the **Name** filter box to display all resources with the word Tanker in their name.

If you entered the search term **Tanker** without the % wildcard, I-Suite would only display those names that began with the word Tanker.

Clear Filter Bar
To clear the **Filter Bar,** click the **Clear Filter Bar** button located to the left of the Filter Bar.

Sorting the Grid

To sort data in a grid, click a column heading. The grid is sorted based on the column that you select. When you click the heading once, the data is sorted in **Ascending** order. When you click it a second time, it is sorted in **Descending** order.

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.

Printing the Grid

After you have filtered and sorted the grid, you can print the grid by clicking the **Print** button in the **Main** toolbar or selecting the **Print** option from the **File** menu.

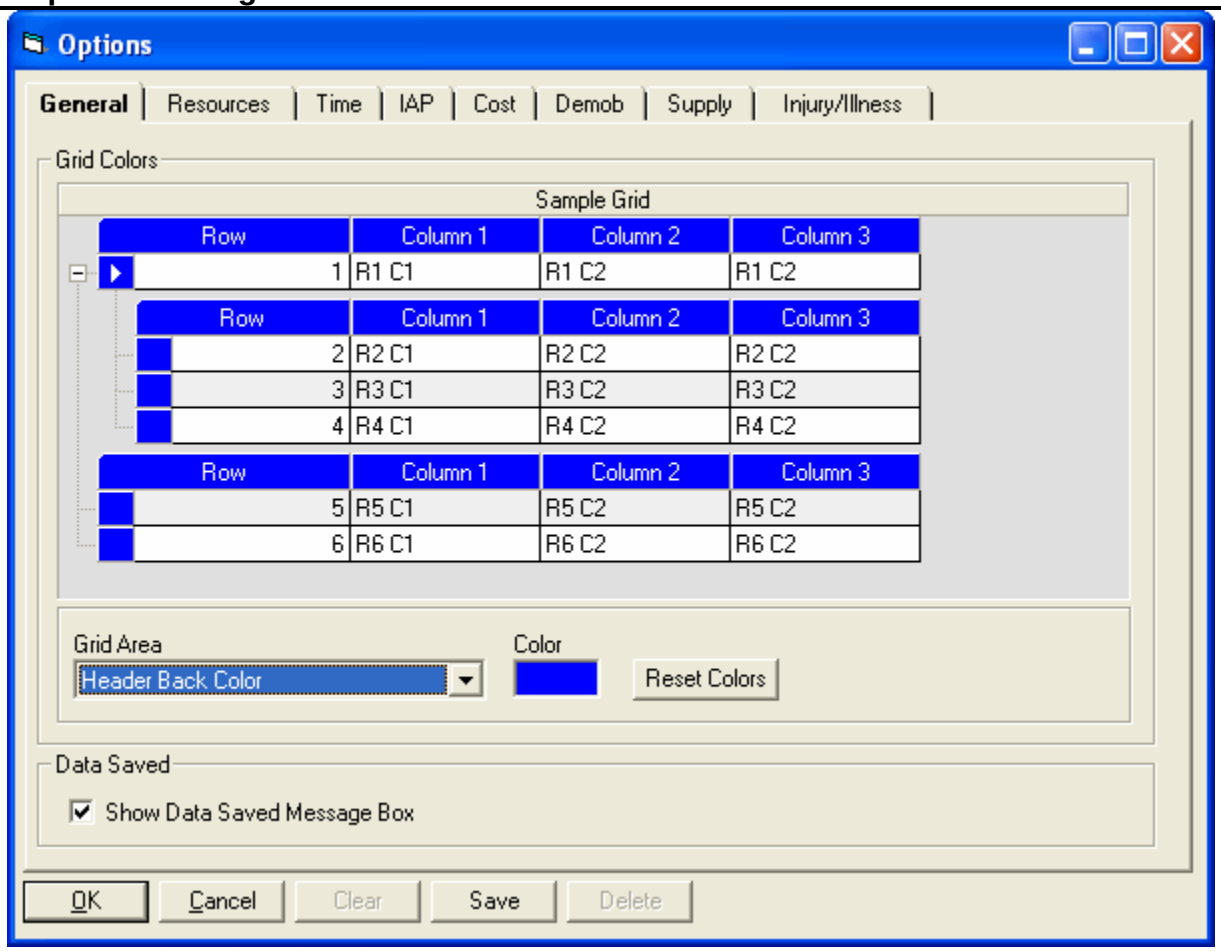
Selecting General Options

This section explains how to set General Options for the I-Suite application:

Changing Grid Colors

Follow the steps in this section to change the colors that display in the grids within the I-Suite system:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.



2. Click the **General** tab to select it.
3. From the **Grid Area** drop-down list, select the area of the grid for which you want to change the color.
4. Click the **Color** box to open a **Color** window.
5. Click the color that you want to use. Then click the **OK** button to apply it to the grid.

When you change the color, you can preview the change under the Grid Colors area on the General tab.

6. Repeat steps 3 - 5 for each grid area that you want to change.
7. When you have finished defining the grid colors, click the **OK** button on the **Options** window to apply your changes.

Data Saved

Follow the steps in this section to either show or hide the **Data Saved** message box when the **Save** button is clicked in any module in I-Suite:

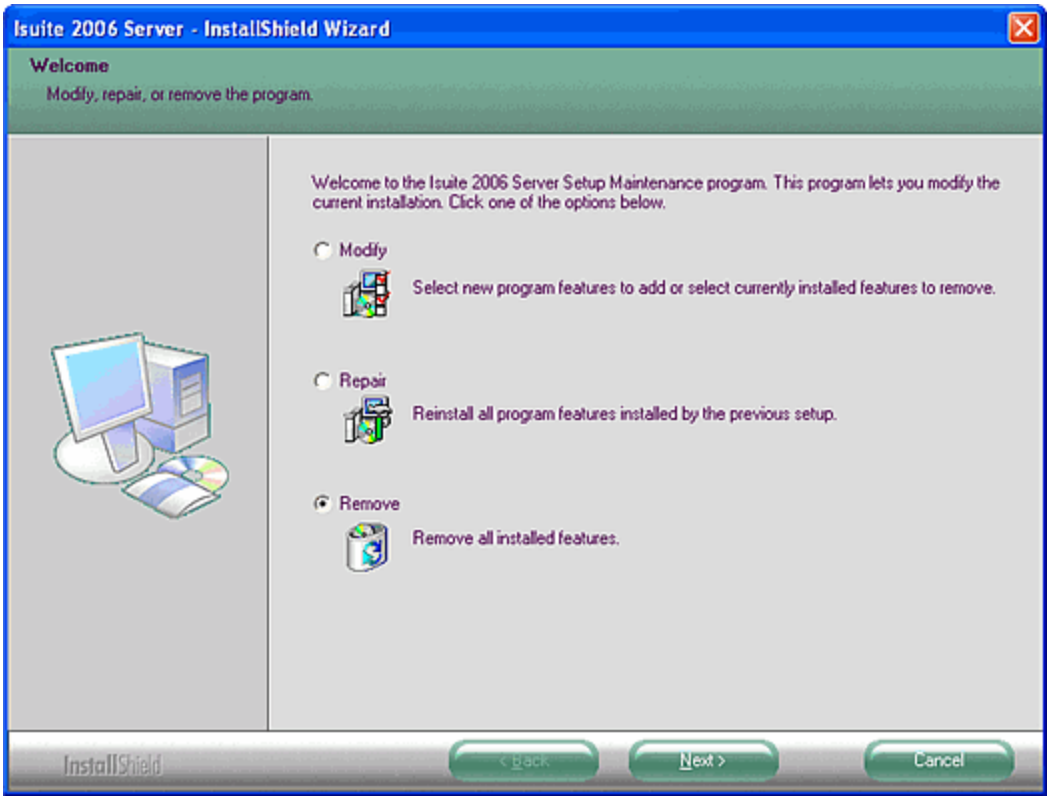
1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
2. Click the **General** tab to select it.
3. If you want the **Data Saved** message to display when saving a record in I-Suite, click to check the **Show Data Saved Message Box** checkbox.

   If you do not want the **Data Saved** message to display when saving a record in I-Suite, click to uncheck the **Show Data Saved Message Box** checkbox.
4. Click the **OK** button to save your changes and close the **Options** window.

Uninstalling I-Suite

Follow the steps in this section to uninstall the I-Suite application from your computer:

1. Access the folder where you downloaded the I-Suite program.
2. Double click the **I-Suite program file** (either Client or Server) to open the **InstallShield Wizard**.



3. Click the **Remove** option to select it. Then click the **Next** button.
4. When the message displays asking whether you want to completely remove the application, click the **Yes** button.
5. When the uninstall process is complete, a window displays indicating that the **Uninstall is Complete**. Click the **Finish** button to close the window.

6. To remove other I-Suite components from your personal computer, do one of the following:

- To delete all I-Suite components and I-Suite databases, in the **Program Files** folder, delete the **ISuite** folder.
- To delete all I-Suite components, but not the I-Suite databases, access the **Program Files** folder. Then open the **ISuite** folder. Delete the **Bin** folder.

7. To complete the uninstall process, restart your computer.

Getting Started Revision History

Revision Date	Revision Summary
2010-08-20	Revised instructions for SQL Server Exception Procedures.
2010-04-27	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised instructions for the 9.01.00 version of I-Suite.
2008-09-04	Revised instructions for the 8.01.04 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Revised instructions for the 7.01.00 version of I-Suite.
2007-01-09	Revised instructions based on changes received for Training Manuals.
2006-12-04	Revised instructions by adding more detail and graphics.
2006-06-26	Added instructions for installing the I-Suite Client version. Added instructions for adding a SQL Server instance and the I-Suite program to the Windows Firewall Exceptions list.
2006-05-01	Revised instructions for initial install and setup of I-Suite.
2006-04-17	Instructions for Getting Started with the new I-Suite 2006 application.

Database Administration

The **Database Admin** section explains how to use **Database Admin** to manage your incident databases. Information entered in **Database Admin** is shared with other I-Suite modules, including:

Topics in this section include:

- See "Database Administration Overview"
- See "Managing Users and Passwords"
- See "Managing Your Incident Databases"
- See "Importing ROSS Data Files"
- See "Purging Social Security Numbers"

- See "Exporting I-Suite Data Files"
- See "Merging Databases"
- See "External User Account Management"
- Auditing

Database Administration Overview

The **Database Admin** option allows you to perform a variety of administrative functions for I-Suite. The types of functions you can perform in Database Admin include:

- See "Managing Users and Passwords"
- See "Copying an Incident Database"
- See "Creating a New Blank Database"
- See "Renaming an Incident Database"
- See "Attaching an Incident Database"
- See "Detaching an Incident Database"
- See "Manually Backing Up the Incident Database"
- See "Automatically Backing Up the Incident Database"
- See "Restoring the Backup Database"
- See "Importing ROSS Data Files"
- See "Purging Social Security Numbers"
- See "Exporting I-Suite Data Files"
- See "External User Account Management"

When working in a networked server/client environment, remember these key points when using **Database Admin**:

- Use **Database Admin** only on the server machine.
- Disable the **hibernate/sleep** mode on the server machine so that the client machine can access the incident database.
- If you promote a client machine to a server, you must start the **MS SQL Server** on that machine.
- Ensure that all client machines connect to the correct server so that they have access to the appropriate incident database.

For specific information about using **Database Admin** to set up personal computers for an incident refer to the following sections:

- See "Enabling Server Connectivity for Windows XP"
- See "Managing Your Incident Databases"

Managing Users and Passwords

Make sure you keep your **Database Admin** and **I-Suite User** passwords confidential. Use the following rules when creating and changing passwords:

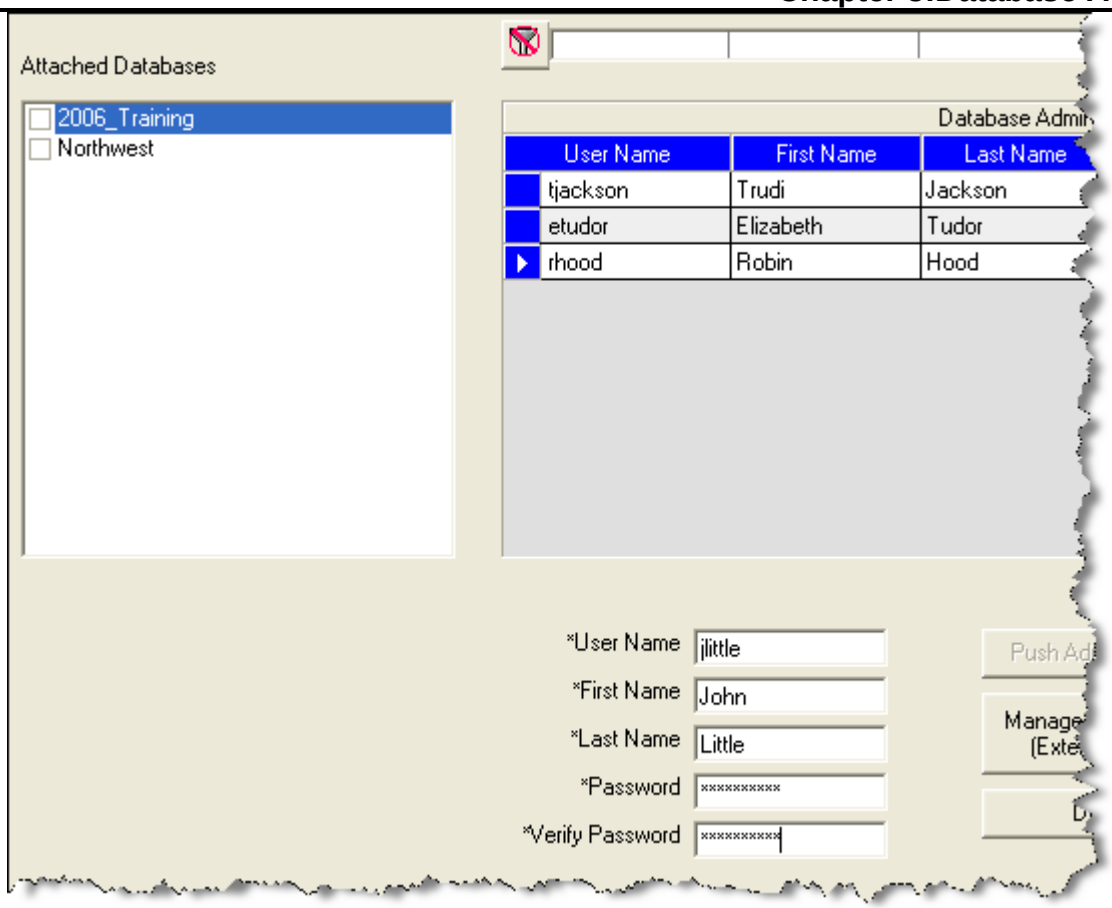
- Change your passwords when necessary.
- Passwords must be at least 12 characters long.
- Passwords must contain at least one lowercase letter.
- Passwords must contain at least one uppercase letter.
- Passwords must contain at least one number.
- Passwords must contain at least one special character.
  - Allowed special characters: !#%&*^_
- Password cannot be a dictionary word.
- Password cannot be one of the 24 previous passwords defined for the account.
- Do not share your passwords with anyone.

For example, while “N1ational!ze is a valid password, “nationalize” is not.

Adding a New Database Admin User

Follow the steps in this section to add a new **Database Admin** user to the I-Suite system:

1. From the **Modules** drop-down menu, select **Database Admin** to open the **Database Admin** window.
2. Click the **Users** button to open the **User Management** window.



3. Click the **Admin Users** tab to select it.
4. Click the **Add** button to add a new user.
5. Enter the **User Name** the person must enter in order to access the I-Suite system as an administrator.
6. Enter the administrator's **First Name** and **Last Name.**
7. Enter the **Password** for the administrator.
8. In the **Verify Password** box, re-enter the new password to verify that it was entered correctly.
9. To save your changes, click the **Save** button. Then click the **Close** button to close the window.

Changing a Database Admin Password

Follow the steps in this section to change the **Database Admin Password**:

1. From the **Modules** drop-down menu, select **Database Admin** to open the **Database Admin** window.
2. Click the **Users** button to open the **User Management** window.
3. Click the **Admin Users** tab to select it.
4. Under **Database Admins**, click to select the appropriate **User Name.**

5. Enter a new **Password**.
6. In the **Verify Password** box, re-enter the new **Password** a second time to verify that it was entered correctly.
7. When the **Confirm Password Reset** window displays, click the **OK** button to save the new password to the system.
8. When the message **Data Saved** displays, click the **OK** button.
9. To close the **User Management** window, click the **Close** button.

Assigning Database Access to Database Admin

Follow the steps in this section to assign database access to a **Database Administrator**:

A **Database Administrator** must have rights assigned to each database that they will be administering.

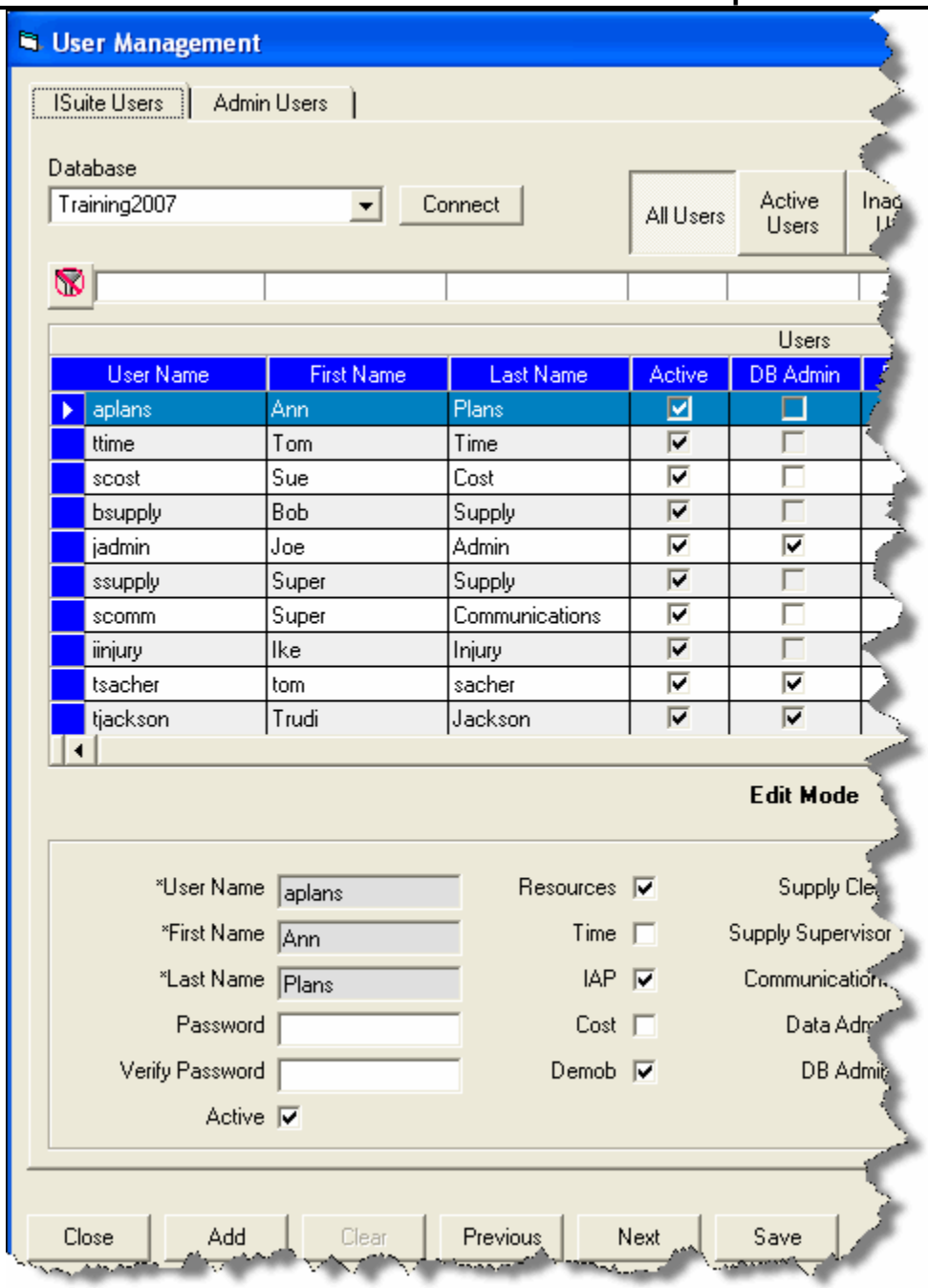
1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Users** button to open the **User Management** window.
3. Click the **Admin Users** tab to select it.
4. Under **Database Admins**, click the name of the new database administrator.
5. Under **Attached Databases**, click to check the checkbox next to each of the databases you want to assign to the database administrator.
6. After the appropriate database(s) are selected, click the **Push Admin Users** button.
7. When the **Data Saved** message displays, click the **OK** button.
8. To close the **User Management** window, click the **Close** button.

Adding a New I-Suite User

Follow the steps in this section to add a new user to the I-Suite system:

Each user must be assigned a unique user name and password to log into a database. There is only one login per user allowed for each database. If a user attempts to log into a database more than once with the same user name, an error message displays indicating that they are already logged into the database under that user name.

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Users** button to display the **User Management** window.



3. Click the **ISuite Users** tab to select it.
4. Click the **Add** button to add a new user.
5. Enter the **User Name** the person must enter to log into the I-Suite system.
6. Enter the person's **First Name** and **Last Name**.
7. Enter the **Password** the person must enter to log into the I-Suite system.
8. In the **Verify Password** box, re-enter the password to make sure it was entered correctly.
9. Click to check one or more of the following options. When you check an option, the user can access that particular module or function in the I-Suite system:

When you select the **DB Admin** role, you cannot select any other roles except **Data Admin**. The **Data Admin** role is automatically selected when you select the **DB Admin** role. You can unselect the **Data Admin** role and leave the **DB Admin** role selected, if needed.

If you select a role other than **DB Admin**, you can assign multiple roles to the user account. The roles you can assign include all roles, except the **DB Admin** role.

- Resources
- Time
- IAP
- Cost
- Demob
- Supply Clerk
- Supply Supervisor
- Communications
- Data Admin
- DB Admin.
- Injury/Illness

10. To assign all rights to the I-Suite user, click the **All Rights** button.

The **All Rights** button assigns all rights to a user, except **DB Admin** and **Injury/Illness**. You must click the **Injury/Illness** checkbox to assign those rights to a user. You cannot select the **DB Admin** role when other roles are selected.

11. To remove all rights from the I-Suite user, click the **Clear Rights** button.
12. To activate the I-Suite user, click to check the **Active** checkbox.
13. To save your changes, click the **Save** button.
14. When the **Data Saved** message displays, click the **OK** button.
15. To close the **User Management** window, click the **Close** button.

Changing I-Suite User Password

Follow the steps in this section to change the password for an I-Suite user:

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Users** button to open the **User Management** window.
3. Click the **I-Suite Users** tab to select it.
4. Under **Users**, click to select the appropriate **User Name**.
5. In the **Password** box, enter a temporary password for the user.
6. In the **Verify Password** box, re-enter the password to make sure it was entered correctly.
7. To save your changes, click the **Save** button.

8. When the **Confirm Password Reset** window displays, click the **OK** button to reset the password.
9. When the **Data Saved** message displays, click the **OK** button.
10. When you are finished with the user records, click the **Close** button to close the window.

Changing Access Rights for an I-Suite User

Follow the steps in this section to change the access rights for an I-Suite user:

Users only have access to the various modules and functional areas of I-Suite that have been checked on the ISuite Users window.

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Users** button to open the **User Management** window.
3. Click the **ISuite Users** tab to select it.
4. Under **Users**, click to select the appropriate user name.
5. Click to check or uncheck the following checkboxes to assign the appropriate rights to the user:

Checking one of the following boxes, gives the selected I-Suite User permission to access that particular module or functional area in I-Suite. If you uncheck a checkbox, the user can no longer access that area of the I-Suite application.

- Resources
- Time
- IAP
- Cost
- Demob
- Supply Clerk
- Supply Supervisor
- Communications
- Data Admin
- DB Admin.
- Injury/Illness

When you select the **DB Admin** role, you cannot select any other roles except **Data Admin**. The **Data Admin** role is automatically selected when you select the **DB Admin** role. You can unselect the **Data Admin** role and leave the **DB Admin** role selected, if needed.

If you select a role other than **DB Admin**, you can assign multiple roles to the user account. The roles you can assign include all roles, except the **DB Admin** role.

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

7. When the **Data Saved** window displays, click the **OK** button to close the window.
8. To close the **User Management** window, click the **Close** button.

Deactivating an I-Suite User

Follow the steps in this section to deactivate an I-Suite user:

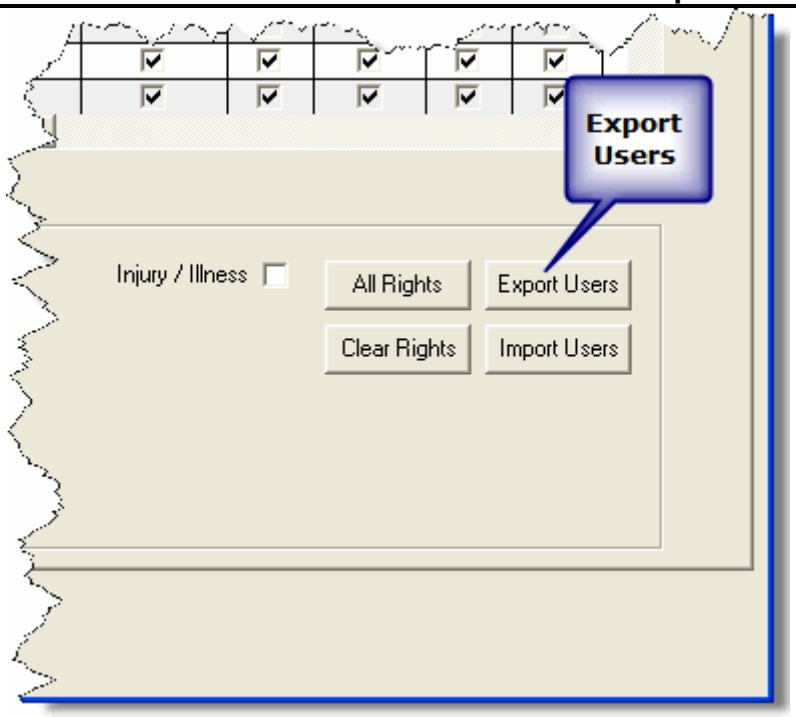
1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Users** button to open the **User Management** window.
3. Click the **ISuite Users** tab to select it.
4. Under **Users**, click to select the appropriate user name.
5. Click to uncheck the **Active** checkbox.
6. To save your changes, click the **Save** button.
7. When the **Data Saved** window displays, click the **OK** button to close the window.
8. To close the **User Management** window, click the **Close** button.

Exporting Users

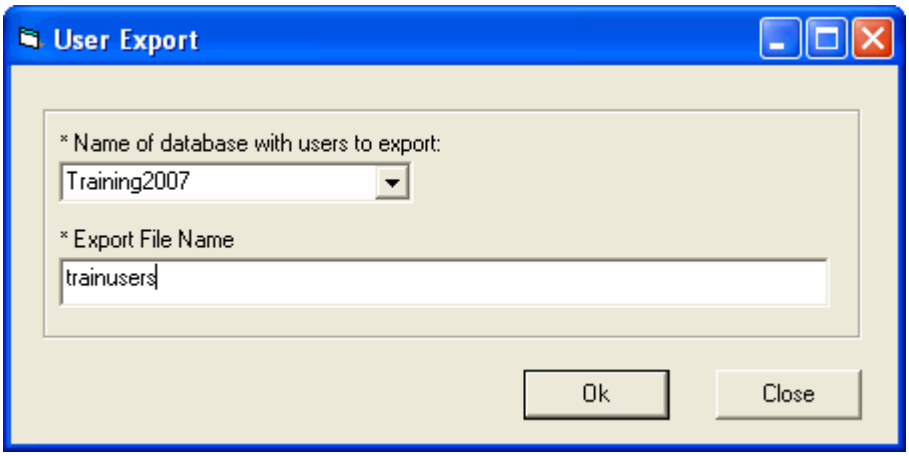
Follow the steps in this section to export users from a database:

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 See "Importing Users".

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Users** button to open the **User Management** window.
3. Click the **Export Users** button.



The User Export window displays:



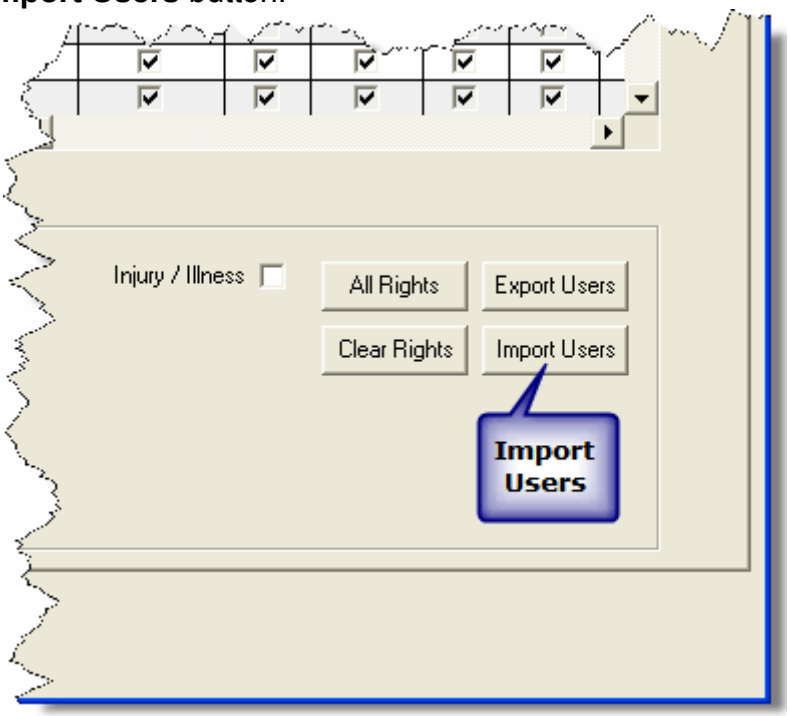
4. From the **Name of database with users to export** drop-down list, select the appropriate database.
5. In the **Export File Name** box, type the name to assign to the user file you are exporting.
6. Click the **OK** button to export the users to a file.
7. When the message **Isuite User Data Export 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.

Importing Users

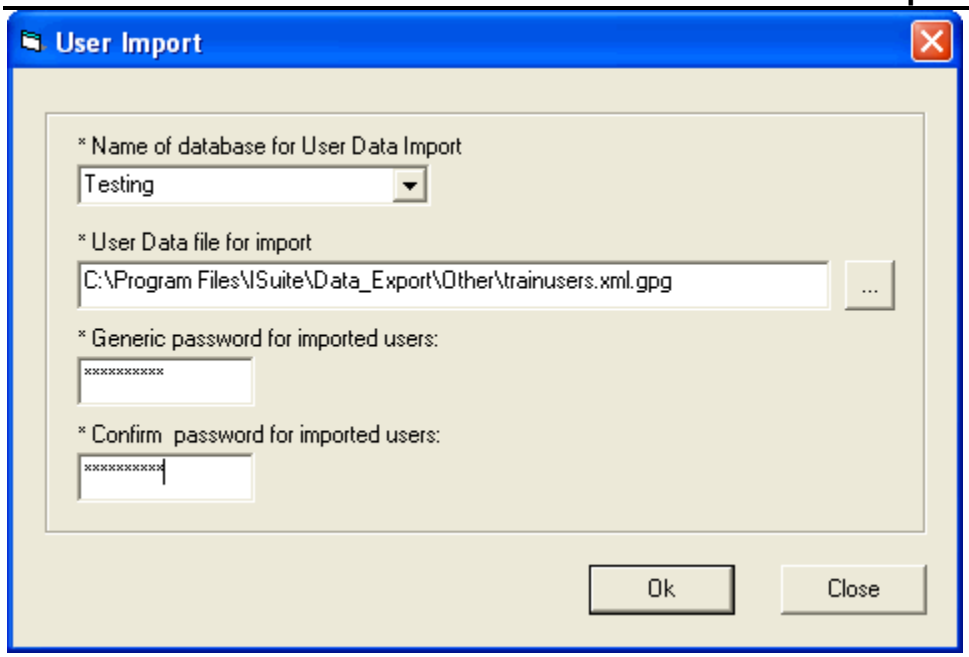
Follow the steps in this section to import users from one database to another:

You must first export the users to a file before you can import them into a different database See "Exporting Users".

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Users** button to open the **Manage Users** window.
3. Click the **Import Users** button.



The Users Import window displays:



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.

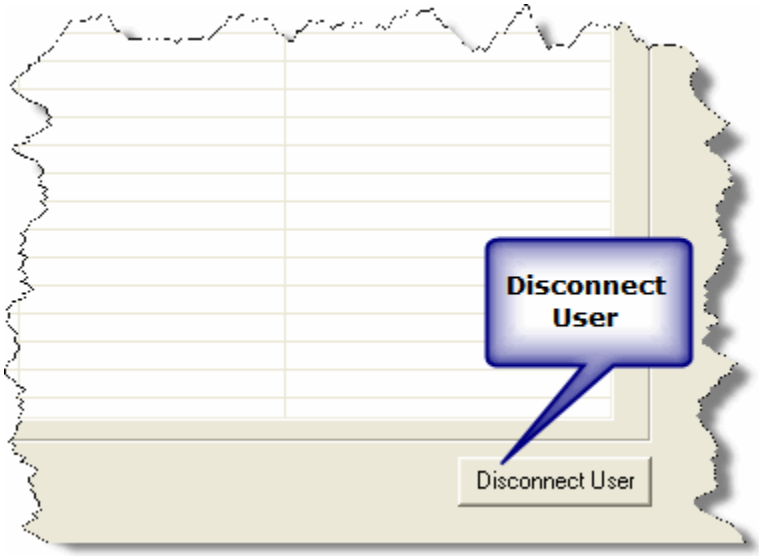
Disconnecting a User

Follow the steps in this section to disconnect a user from the database:

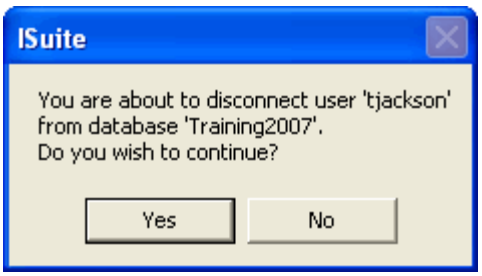
This process clears the user's connection if there are problems that occur when logging into the system.

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.

2. Under **Connection Information**, click the user you want to disconnect.
3. Click the **Disconnect User** button that displays beneath the **Connection Information** area.



A message displays indicating that you are about to disconnect the user from the database.



4. Click the **Yes** button to disconnect the user.

After the user is disconnected from the database, they can open I-Suite and log back into the database.

Managing Your Incident Databases

This section identifies how to manage an incident database. It includes information on how to create, copy, attach, detach, backup, restore, and rename an incident database.

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

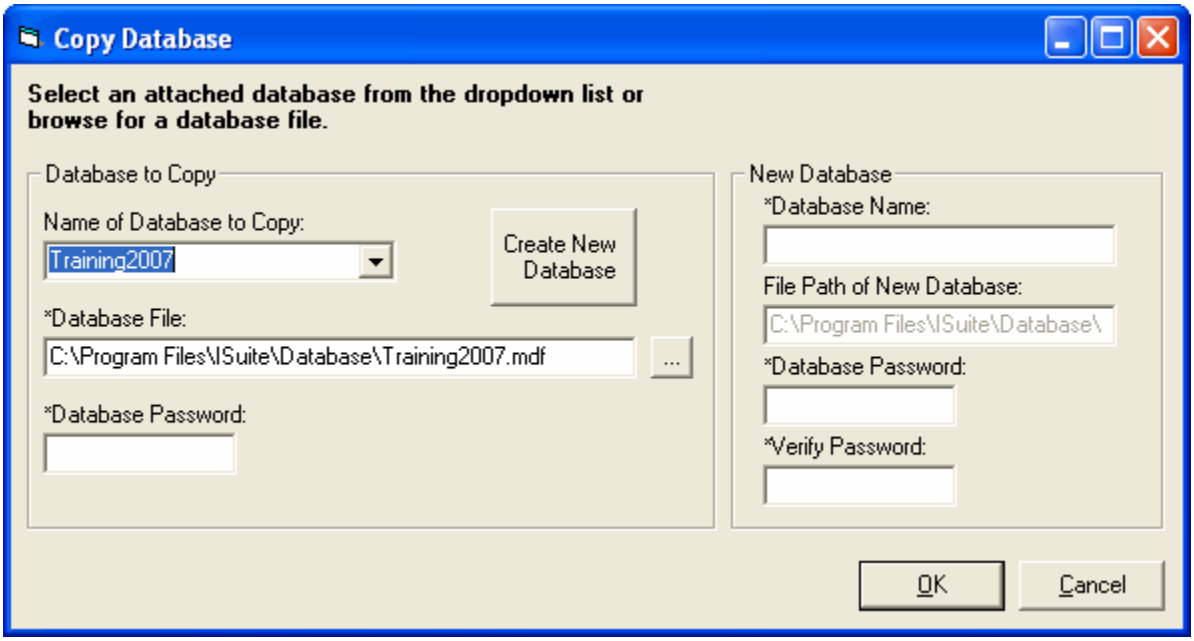
- The database name should include the incident name.
- The name must not include any spaces, semi-colons, dollar signs, or any characters not allowed by MS Windows File Naming Conventions.

Copying an Incident Database

Follow the steps in this section to copy an **Incident Database**:

Use your team's naming standards to name your incident database.

1. From the **Module** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Copy/New DB** button to open the **Copy Database** window.



3. From the **Name of Database to Copy** drop-down list, select the database that you want to copy. If the name of the database is not listed, you can type the name into the text box.

   When you select a database, I-Suite automatically inserts the path for the database in the **Database File** box.

If the name of the database you want to copy does not display in the **Name of Database to Copy** drop-down list, you can manually search for the database by clicking the **Browse** button next to the **Database File** box.

4. Enter the **Database Password** for the database being copied.
5. Under **New Database**, enter the **Database Name** to assign to the new database.
6. Enter the **Database Password** to assign to the new database.

The new **Database Password** must be 8 to 16 characters long and follow the same rules as those defined for User Passwords See "Managing Users and Passwords".

7. In the **Verify Password** box, re-enter the password for the new database to make sure it was entered correctly.
8. Click the **OK** button to copy information from the selected database to the new database.

The **File Path of New Database** box displays the complete file location of the new incident database. The **Copy Database** procedure will automatically attach the new database.

Creating a New Blank Database

Follow the steps in this section 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.

When you click the **Create New Database** button, the **Database to Copy** area is disabled.

4. Under **New Database**, enter the **Database Name** to assign to the new database.
5. In the **Database Password** box, type the password to assign to the database.
6. Retype the password in the **Verify Password** field to make sure it was entered correctly.
7. Click the **OK** button to create the new database.

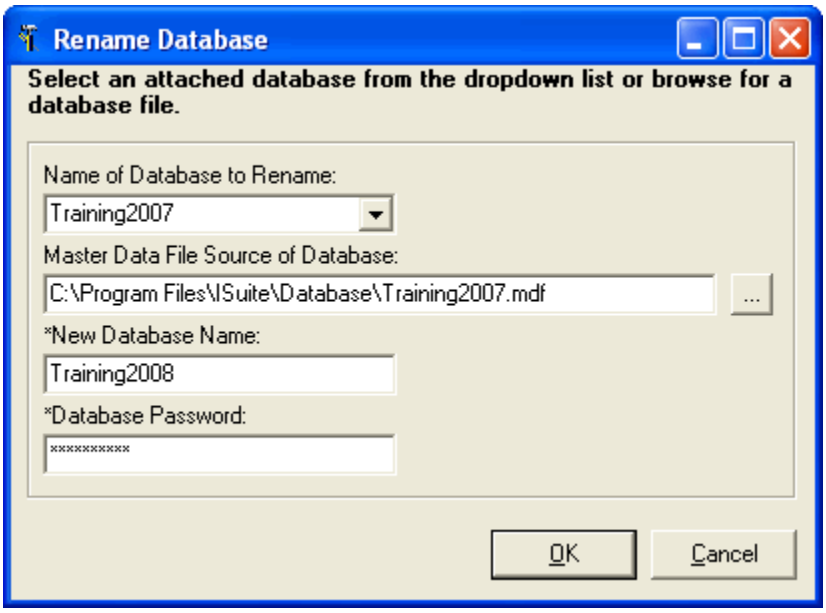
Renaming an Incident Database

Follow the steps in this section to rename an **Incident Database**:

Use your team's naming standards to rename your incident database.

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.

2. Click the **Rename** button to open the **Rename Database** window.



3. From the **Name of Database to Rename** drop-down list, select the database that you want to rename.

   When you select a database, I-Suite automatically inserts the path for the database in the **Master Data File Source of Database** box.

If the name of the database you want to rename does not display in the **Name of Database to Rename** drop-down list, you can manually search for the database by clicking the **Browse** button next to the **Master Data File Source of Database** box.

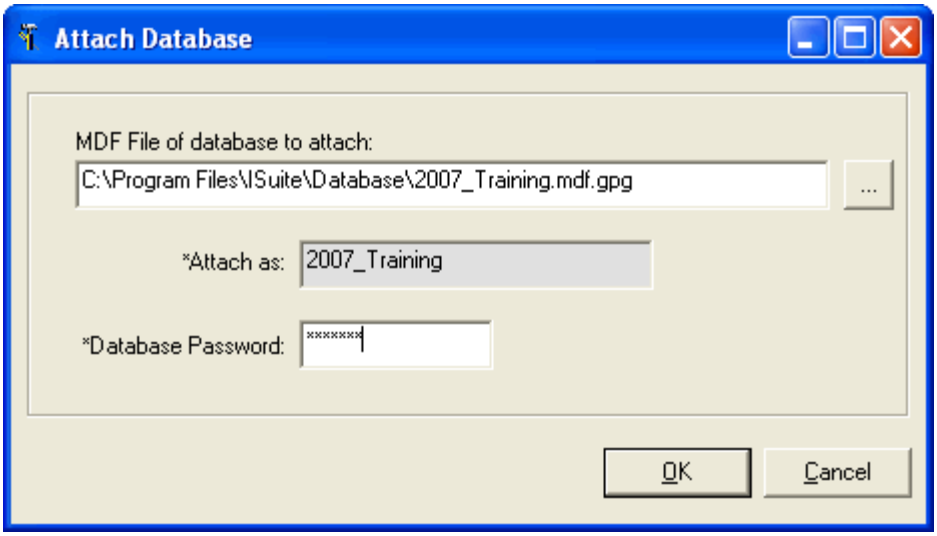
4. Enter the **New Database Name**.
5. Enter the **Database Password**.
6. Click the **OK** button to rename the database.

Attaching an Incident Database

Follow the steps in this section to attach an Incident Database:

1. From the **Modules** drop-down menu at the top of the Main I-Suite window, select the **Database Admin** option to open the **Database Admin** window.

2. Click the **Attach** button to open the **Attach Database** window.



3. Click the **Browse** button next to the **MDF File of database to attach** box. Use the window that displays to browse to the folder where the database is located. Click the database, and then the **OK** button to insert the path into the **MDF File of database to attach** box.

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.

4. Enter the **Database Password**.
5. Click the **OK** button to run the attachment procedure.

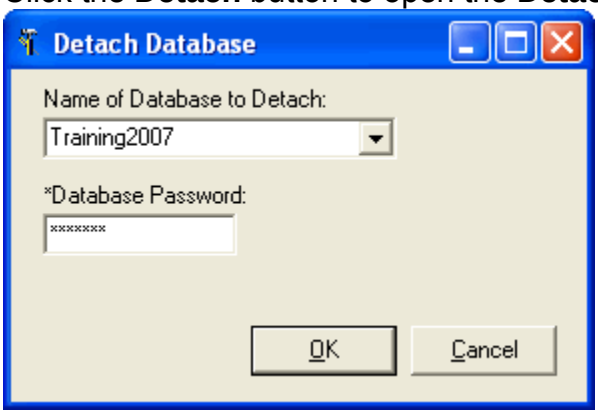
Detaching an Incident Database

Follow the steps in this section to detach an Incident Database:

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. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.

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** field, type the password for the database you are detaching.
5. Click the **OK** button to detach the database.
6. When the **Warning** window displays, click the **Yes** button to detach the database.

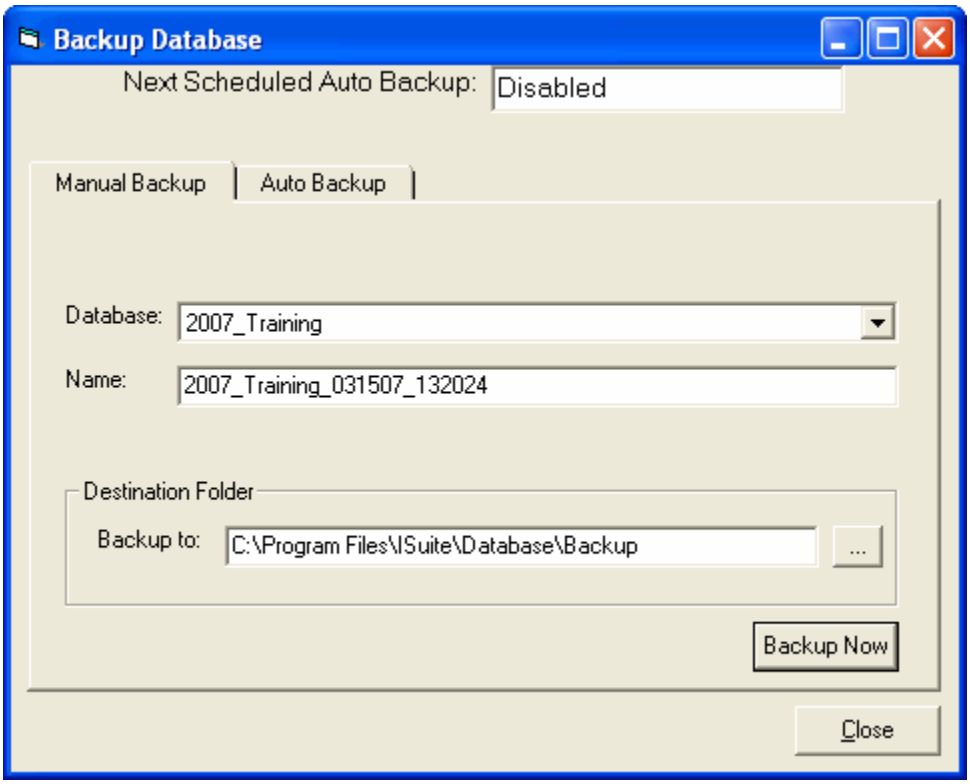
Manually Backing Up the Incident Database

Follow the steps in this section to manually backup the **Incident Database**:

To recover a backed up Incident Database, you must know the **Login Password**.

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Backup** button to display the **Backup Database** window.

3. Click the **Manual Backup** tab.



4. Select the database you want to backup from the **Database** drop-down list.
5. I-Suite automatically creates a name for the backup and inserts it into the **Name** box. The backup name includes the **Database Name_Current Date_Current Time**. If needed, you can change the backup name by typing over the existing text.
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.

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.

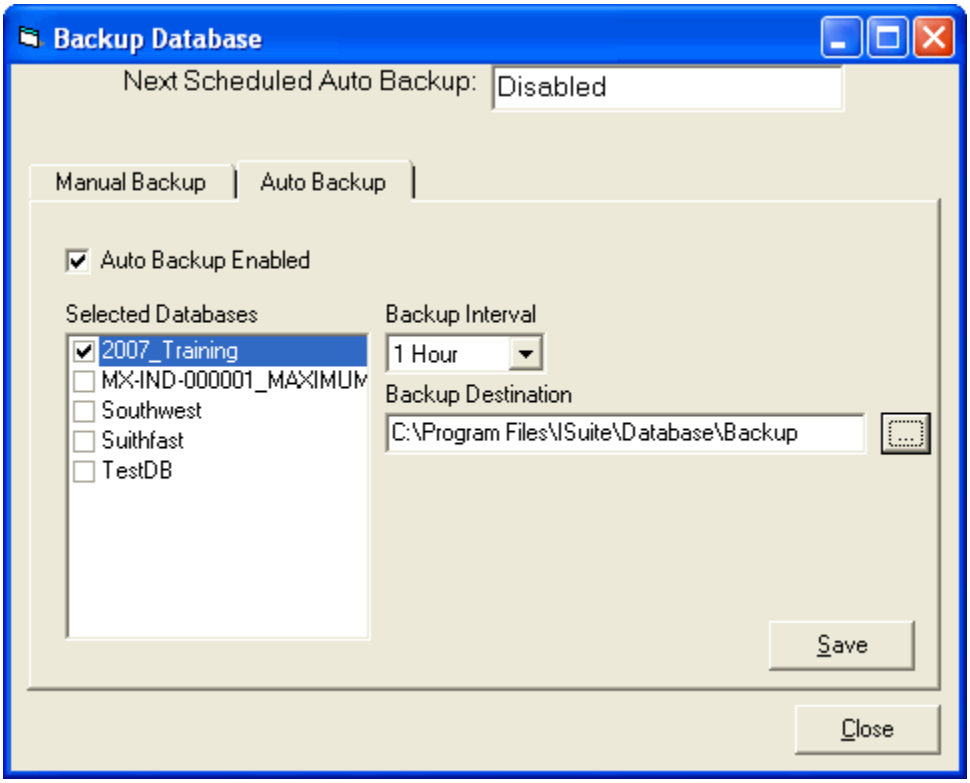
7. Click the **Backup Now** button to start the backup process.
8. The message **Back-up in progress . . . Please wait!** displays while the backup is performed. When the message **Backup completed successfully** displays, click the **OK** button to close the window.
9. When the **Backup Database** window redisplays, click the **Close** button to close the window.

Automatically Backing Up the Incident Database

Follow the steps in this section to automatically backup the **Incident Database**:

Once initiated, Automatic Backups will continue at the specified intervals until backups are deactivated.

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Backup** button to open the **Backup Database** window.
3. Click the **Auto Backup** tab.



4. Click to check the **Auto Backup Enabled** checkbox to enable the automatic backup system.
5. In the **Selected Databases** box, click to check the checkbox next to each of the databases you want to include in the automatic 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. I-Suite automatically inserts the path **C:\Program Files\ISuite\Database\Backup** into the **Backup Destination** box. If needed, you can change this path by either typing a new one or using the **Browse** button to select the path.

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 Destination** box

8. Click the **Save** button to save the settings for the automatic backup procedure. The system automatically inserts the date and time when the backup will next occur in the **Next Scheduled Auto Backup** box at the top of the window.
9. Click the **Close** button to close the **Backup Database** window.

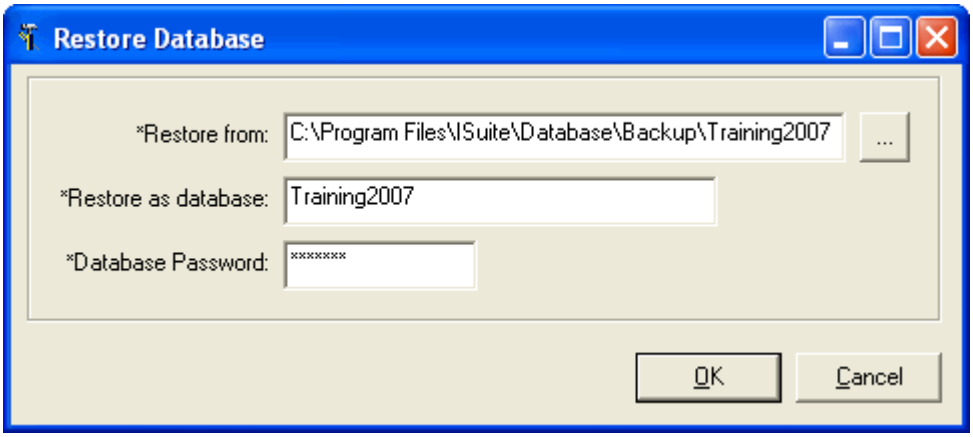
10. A note displays indicating that I-Suite must be running in order for the auto-backup to occur. Click the **OK** button to close the window

If you close the I-Suite application, Automatic Backups will not occur. For security reasons, you must lock your computer or set it in stand-by mode when you leave the computer.

Restoring the Backup Database

Follow the steps in this section to restore the backup database, if needed:

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Restore** button to open the **Restore Database** window.



3. Click the **Browse** button next to the **Restore From** box. A **Browse for Existing Database Backup File** window displays.
4. Use the **Browse** window to search for the database that you want to restore. Click the database to highlight it and the **OK** button to insert the path in the **Restore from** box.
5. In the **Restore as Database** box, type the name to assign to the restored database.

Restoring the database with the same name as the original database will overwrite the original database.

6. Enter the **Database Password.**
7. Click the **OK** button to restore the database to the I-Suite system.
8. If a database already exists with the name defined in the **Restore as Database** box, a window displays indicating that the database already exists. The system will assign a different name to the restored database. Click the **OK** button to rename the restored database.
9. If you click the **Cancel** button, a warning displays indicating that you must detach or delete the database with the same name before you can restore it. Click the **OK** button to cancel the database restore procedure.

Importing ROSS Data Files

This section explains how to download a ROSS data file and then import it into the I-Suite database. Remember these key points when importing ROSS data into an I-Suite database:

- ROSS data can be imported into an I-Suite database as many times as needed.

I-Suite automatically matches crew members to crews when the import process is run.

Supply items in the ROSS import file will not be imported into the I-Suite database.

- Some ROSS data fields allow more characters than are allowed in the corresponding I-Suite data fields. If the data imported from ROSS exceeds the corresponding I-Suite data field limit, you will be prompted to input data with less characters. The I-Suite data fields that are affected include:
    - **Incident Name**: limit 20 characters
    - **Incident Number**: limit 13 characters
    - **Agency**: limit 4 characters
    - **KindCode**: limit 4 characters
    - **HomeUnitCode**: limit 6 characters
    - **Resource Name**: limit 53 characters

Important Note: I-Suite will only display and save the first 20 characters of an **Incident Name** or **Resource Name**. When you import any **Incident Name** or **Resource Name** that contains more than 20 characters, you must rename the **Incident** or **Resource** with a name that contains 20 or fewer characters.

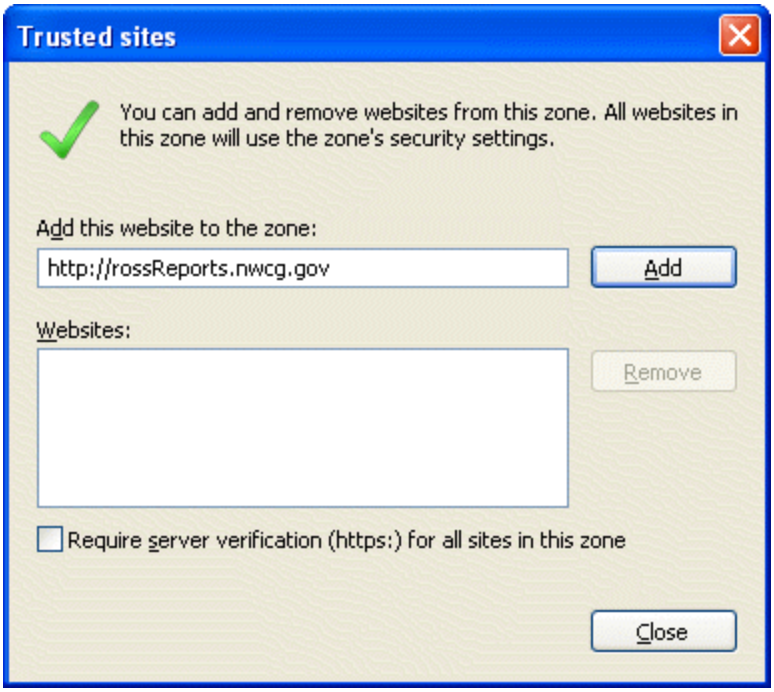
You must know your **ROSS User ID** and **Password** to download ROSS data from the Cognos Web site. If you have any questions about your **ROSS User ID** and **Password**, contact the **Home Dispatch Center** that created your account.

Check Internet Settings Prior to Download

Follow the steps in this section to prior to downloading a ROSS data file:

1. Start your Internet Explorer.
2. Select the **Tools** menu and the **Internet Options**.
3. Click the **Security** tab and select the **Trusted sites** option.
4. In the **Add this website to the zone** box, enter **http://rossReports.nwcg.gov** and click the **Add** button..

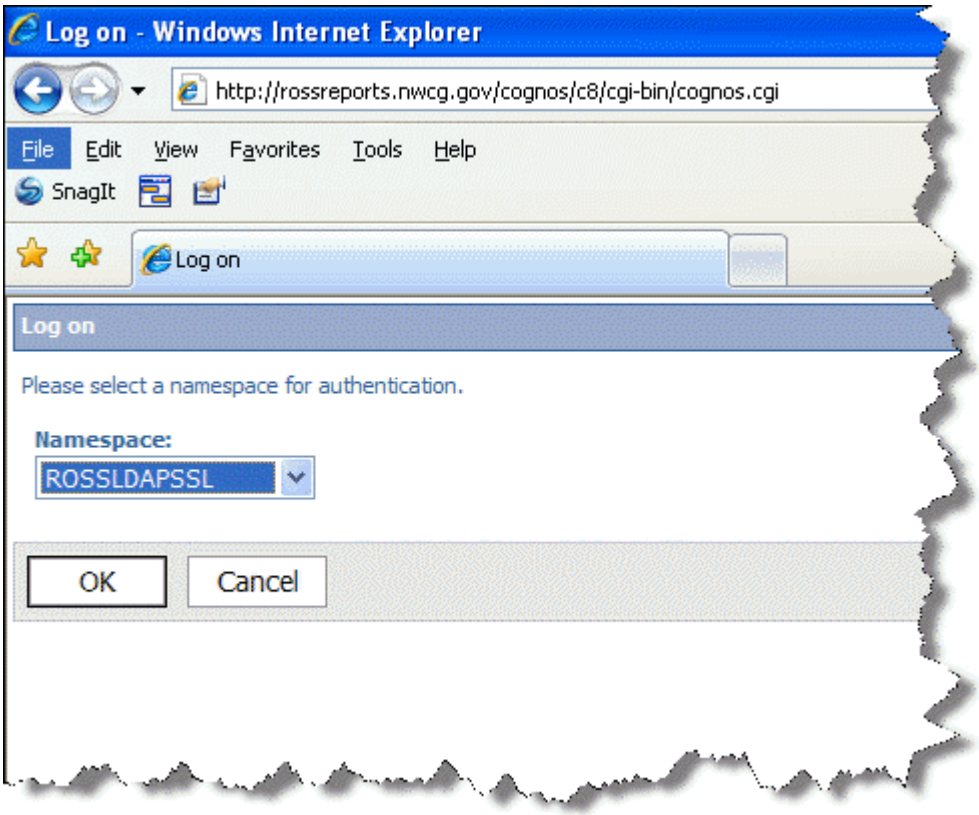
5. Click the **Close** button to close the **Trusted sites** window.



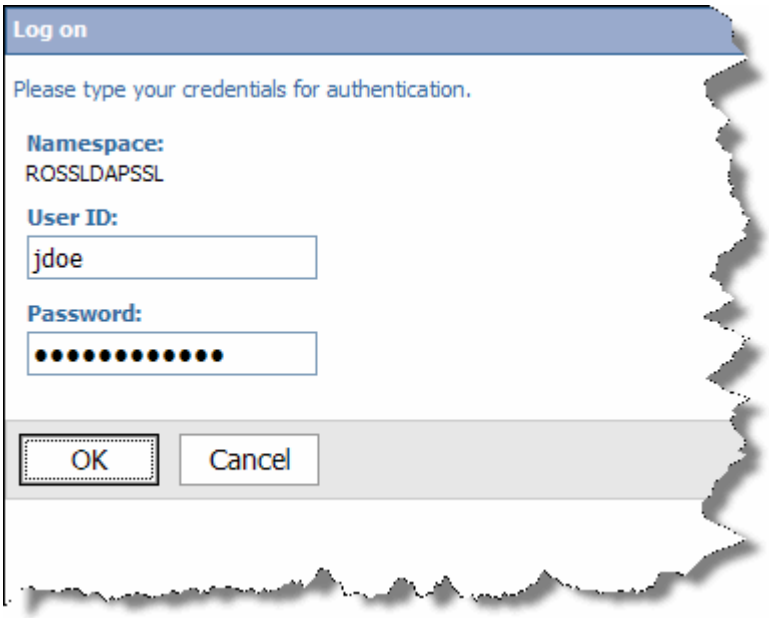
Download ROSS Data File

This process can be run from either 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 of the steps.

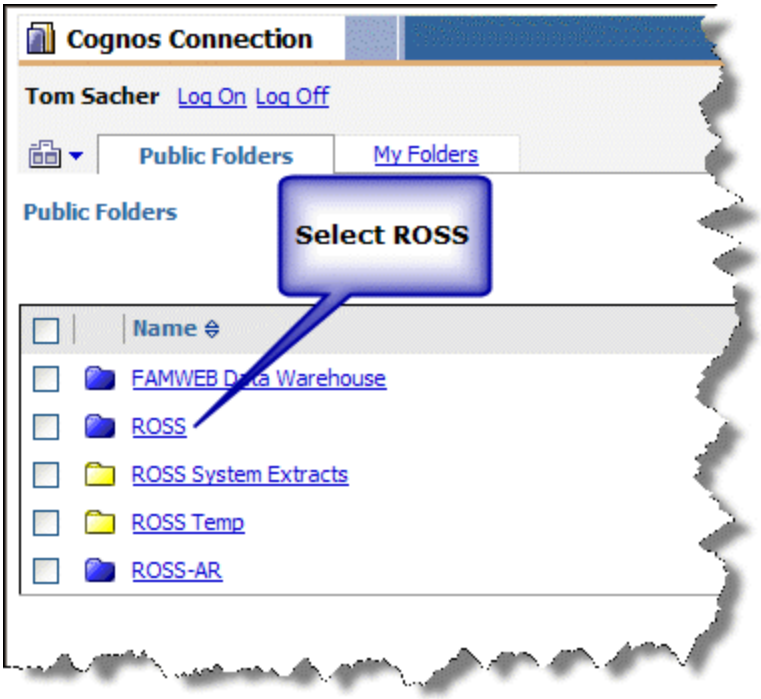
1. Open **Internet Explorer**.
2. In the **Address** box, enter **http://rossReports.nwcg.gov/cognos/c8/cgi-bin/cognos.cgi**.
3. From the **Namespace** drop-down list on the **Login** page, select **ROSSLDAPSSL** and click the **OK** button.



4. Enter your **ROSS User ID** and **Password**. Click the **OK** button to log into Cognos.

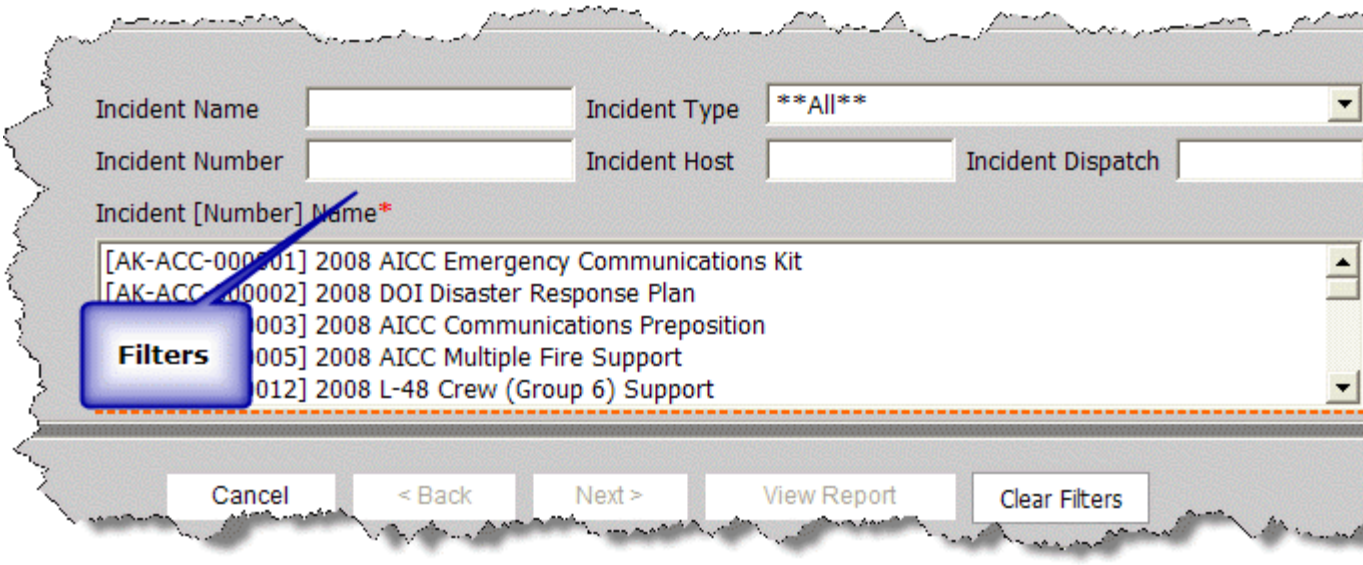


5. On the **Public Folders** tab, select **ROSS**.

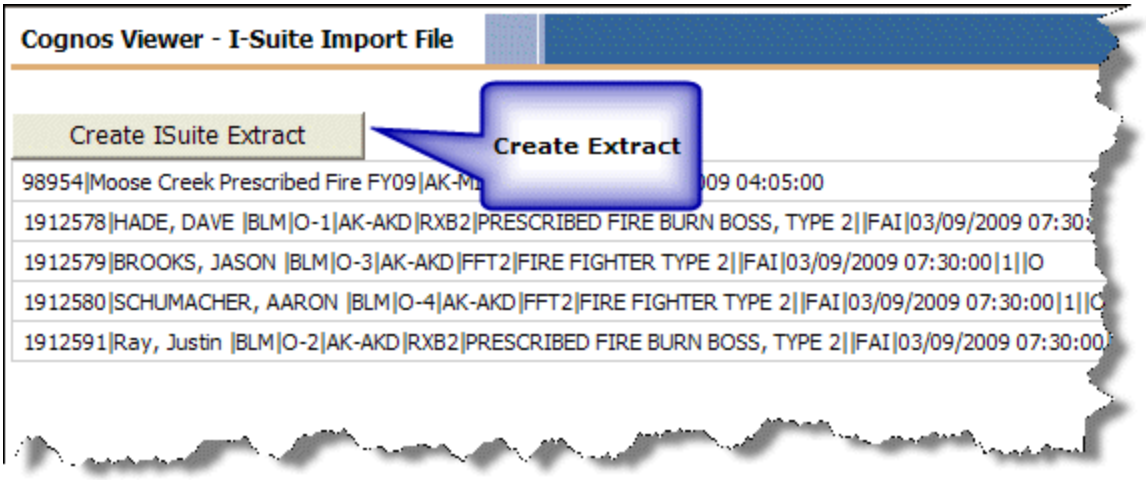


6. Select the **User Community Reports** option.
7. Select the **System Extracts** option.
8. Select the **I-Suite Import File** option.
9. Click the **Incident label** on the top left side of the page to expand or collapse the incident selection area.

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 I-Suite Extract** button to extract the data in the report for I-Suite.



14. In the window that displays, enter the name to assign to the file you are extracting and identify the directory where you want to save it. Click the **Save** button to extract the file.

Make sure you use the default settings when you save the file. The file type must be HTML (i.e., *.htm or *.html). The language must be Unicode. If you change these settings, the file may not import correctly into the I-Suite application.

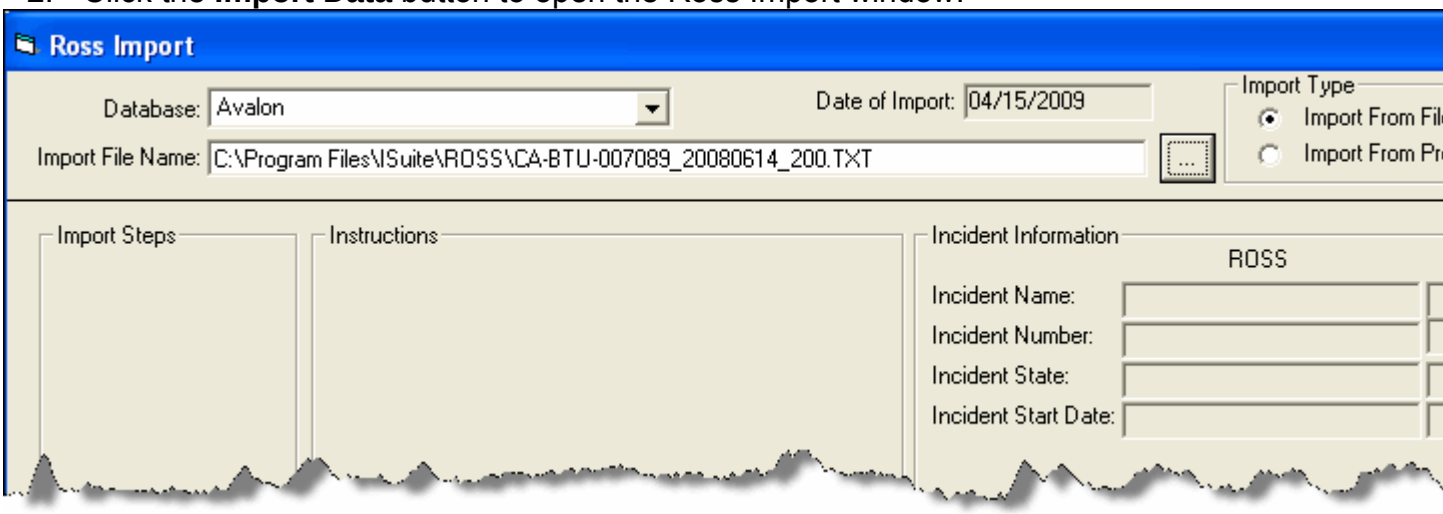
15. Click the **Log Off** option on the top left corner of the page.
16. Close Internet Explorer.

Importing ROSS Data into Database File

Follow the steps in this section to import ROSS data into an I-Suite Database file:

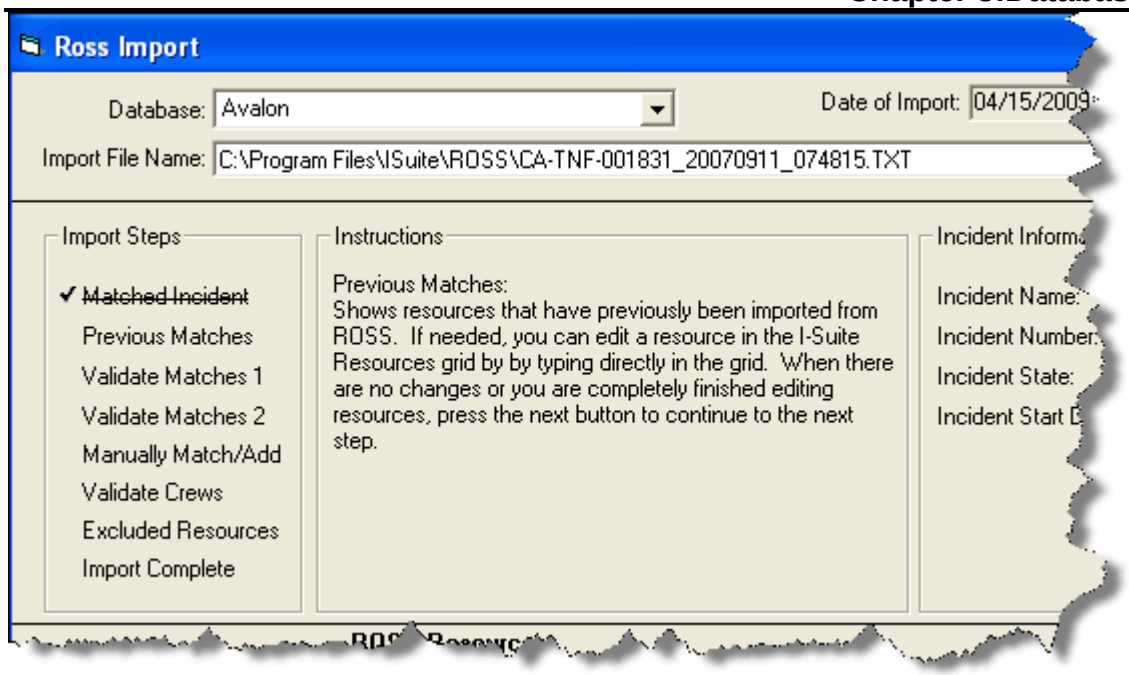
The **Status Bar** in the bottom left corner of the Ross Import window identifies the database into which you are importing data. It also shows the current step on which you are working in the process.

1. From the **Module** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Import Data** button to open the Ross Import window.



3. From the **Database** drop-down list, select the database into which you will be importing the ROSS data file.
4. Select the **Import from File** option under **Import Type**.
5. Click the **Import Data** button to open the ROSS Import window:
4. Click the **Browse** button next to the **Import File Name** box. In the window that displays, browse to the ROSS data file you want to import. Click the file and then the **OK** button to insert the path into the **Import File Name** box.
5. When the **Ross Import** window redisplays, click the **Load Data** button.

   After the data is loaded, a list of import steps displays at the top of the window. If a step is crossed out, that step was completed. The steps that display are based on whether you are importing to a database with existing data or a blank database.



Ross Import Buttons

The following buttons display on the **Ross Import** window after you have imported the data:

The **Remove** buttons only remove data from the I-Suite grid that has not already been imported (saved) into the I-Suite database. Data previously entered or imported into the I-Suite database cannot be removed with the **ROSS Import** function.

- **Selector** – highlights the row to the right of the button
- **>> (Select All)** – moves ALL data in the ROSS grid to the I-Suite grid
- **> (Add Selected)** – moves SELECTED data in the ROSS grid to the I-Suite grid
- **< (Remove Selected)** – moves SELECTED data that was added to the I-Suite grid back to the ROSS grid
- **<< (Remove All)** – moves ALL data that was added to the I-Suite grid back to the ROSS grid
- **Match** – matches the selected ROSS and I-Suite incidents or resources
- **Unmatch** - unmatches the selected ROSS and I-Suite incidents or resources
- **Restart Step** – restarts the current step without importing data from the current step into I-Suite
- **Next** – imports all added or changed data currently in the I-Suite grid into the I-Suite database

There are two basic scenarios for importing a ROSS data file into an I-Suite database:

- Importing the data into a blank I-Suite database or adding an incident to an I-Suite database that contains other incidents.
- Importing data into an I-Suite database that already contains data (either manually entered or previously imported from a ROSS database).

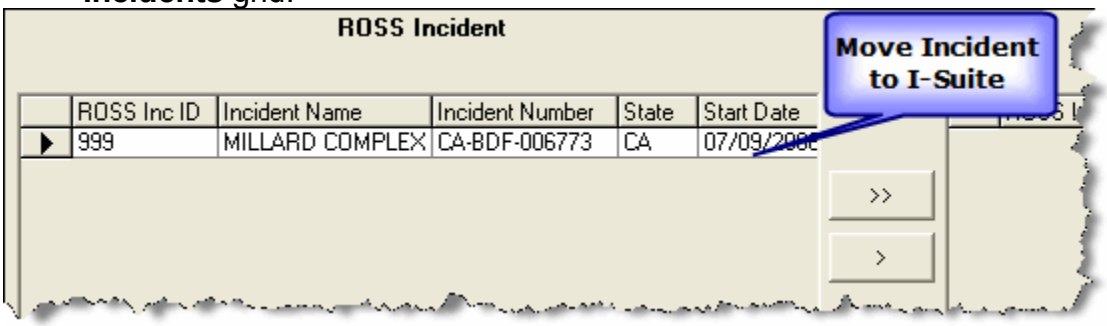
Instructions for both scenarios are listed below:

Importing an Incident into an I-Suite Database

Follow the steps in this section to import a ROSS Incident into an I-Suite database:

You must have already imported ROSS data into a database before you can proceed with this procedure. See "Importing ROSS Data Files"

1. On the ROSS Import window, click the incident you want to import in the **ROSS Incidents** grid.



2. Click the **>>** button to move the incident from the **ROSS Incident** grid to the **I-Suite Incidents** grid.
3. Click the **Next** button to move to the next step in the Import process.

Matching a Ross Incident to an I-Suite Incident

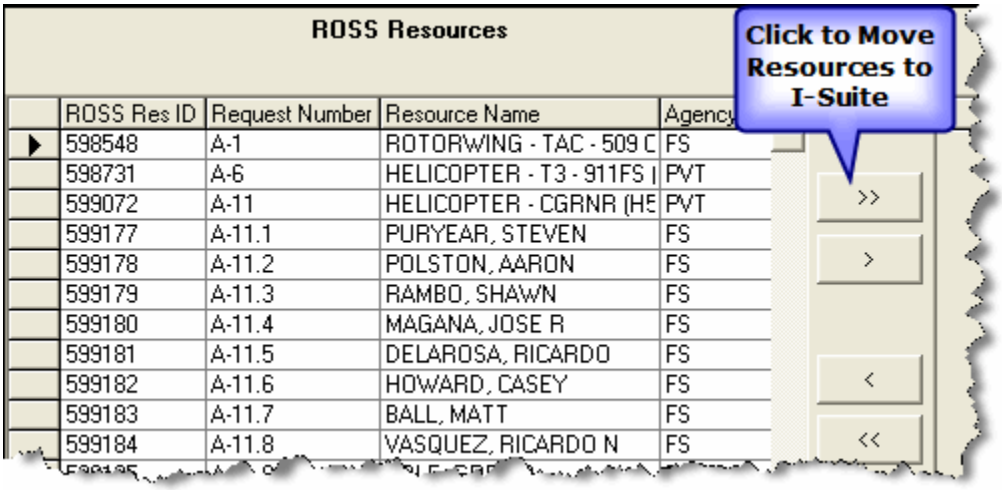
Follow the steps in this section to match a Ross Incident to an I-Suite incident:

1. On the **Ross Import** window, click the incident you want to match in the **Ross Incident** grid.
2. In the **I-Suite Incidents** grid, click the corresponding incident.
3. Click the **Match** button to match the **Ross Incident** to the **I-Suite Incident**.
4. Click the **Next** button to continue with the next step in the Import process.

Importing Ross Resources into a Blank Database

Follow the steps in this section to import ROSS resources into an I-Suite database:

1. On the **Ross Import** window, click the **>>** button to add all resources listed under the **ROSS Resources** grid to the **I-Suite Resources** grid.



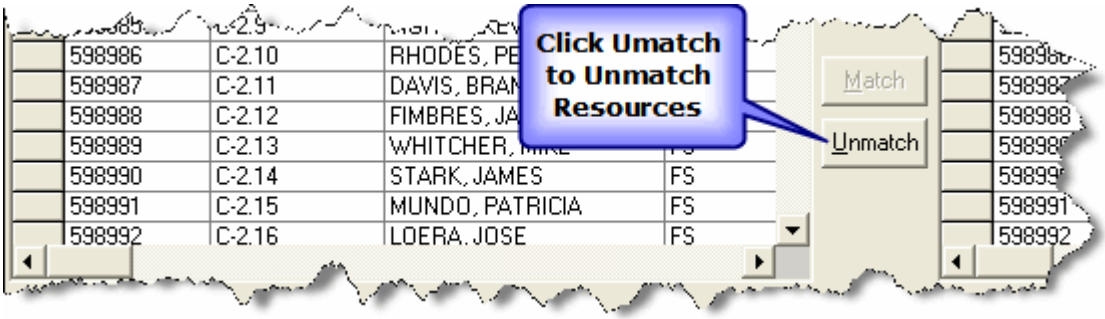
If you want to select individual resources to add, hold down the **Ctrl** key and click each resource under the **ROSS Resources** grid that you want to include. Then click the **>** button to move the selected resources to the **I-Suite Resources** grid.

2. Click the **Next** button to move to the next step in the Import process.

Validating Previous Matches

Follow the steps in this section to validate previously matched **ROSS** and **I-Suite Resources**:

1. On the **ROSS Import** window, compare the **ROSS Resources** to the **I-Suite Resources**.
2. If a matched resource is found that should not be matched, click the resource in the **I-Suite Resource** grid.
3. Click the **Unmatch** button to unmatch the resources.



You can also unmatch the resources by typing over the information for the resource in the **I-Suite Resource** grid.

4. Click the **Next** button to move to the next step in the Import process.

Validating Resources Matched by Request Number & Name

Follow the steps in this section to unmatch resources that were incorrectly matched by **Request Number** and **Name**. This is the **Validate Matches 1** step on the **Ross Import** window:

1. On the **Ross Import** window, click the resource that should not be matched in the **I-Suite Resources** grid.
2. Click the **Unmatch** button.

   If the data is the same for the resources that do not match, you can type directly into the I-Suite Resources grid to edit the resource data.
3. Click the **Next** button to move to the next step in the Import process.

Validating Resources Matched by Request Number

Follow the steps in this section to unmatch resources that were incorrectly matched by **Request Number**. This is the **Validate Matches 2** step on the **Ross Import** window:

1. On the **ROSS Import** window, compare the **ROSS Resources** that were matched to **I-Suite Resources** by request number.
2. In the **I-Suite Resources** grid, click the resource that should not be matched.
3. Click the **Unmatch** button to unmatch the resource.

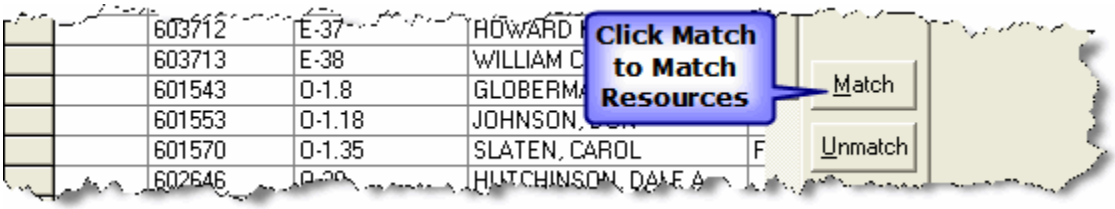
   If the data is same for the resources that do not match, you can type directly into the I-Suite Resources grid to edit the resource data.
4. When you have finished editing all of the I-Suite resources, click the **Next** button to move to the next step in the Import process.

Manually Matching Resources

Follow the steps in this section to manually match resources:

1. On the **ROSS Import** window, click the resource you want to match in the **ROSS Resources** grid.
2. In the **I-Suite Resources** grid, click the corresponding resource that should be matched.

3. Click the **Match** button to match the resources.



If the resource is a match, but the data is not the same, you can type directly into the I-Suite Resources grid to edit the resource data.

Manually Adding Resources

Follow the steps in this section to manually add resources to an I-Suite database:

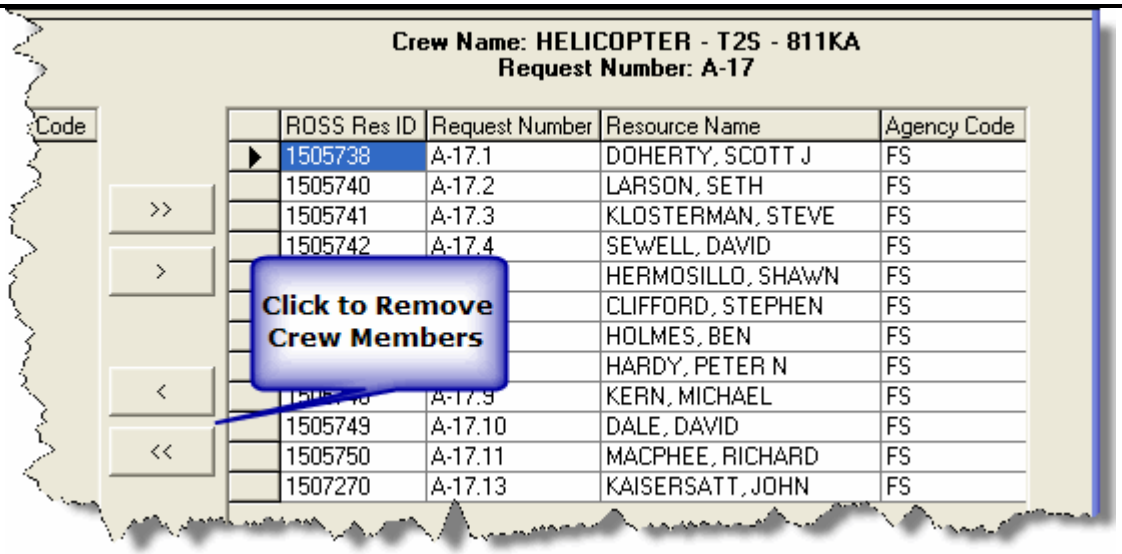
1. On the **ROSS Import** window, click **>>** to add all resources listed in the **ROSS Resources** grid.

   If you want to select individual resources to add, hold down the **Ctrl** key and click each resource under the **ROSS Resources** grid that you want to include. Then click the **>** button to move the selected resources to the **I-Suite Resources** grid.
2. Click the **Next** button to move to the next step in the Import process

Assigning Crew Members to a Crew

Follow the steps in this section to assign crew members in a ROSS Import to a crew in I-Suite:

1. On the Ross Import window, review the list of crew members assigned to a crew. If there is a crew member listed that should not be included in the crew, click the crew member and the **<** button.



To remove multiple crew members, hold down the **Ctrl** key and click each crew member listed in the **Assigned Crew Members** grid that you want to remove. Then click the **<** button.

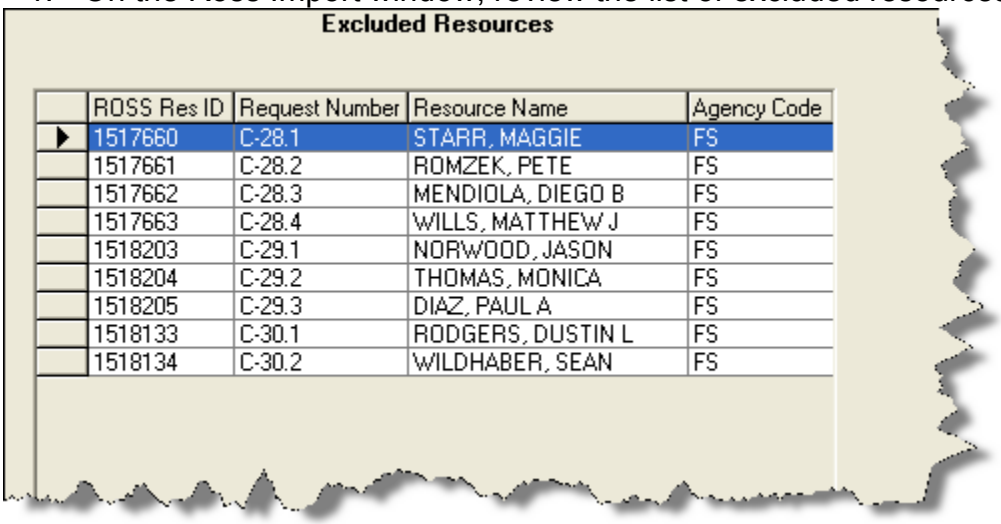
To remove all crew members from a crew, click the **<<** button.

2. Click the **Next** button to assign the listed crew members to the crew and display the next crew to validate.
3. When all of the crews are validated, click the Next button to move to the next step in the process.

Exclude Resources

Follow the steps in this section to view excluded resources:

1. On the Ross Import window, review the list of excluded resources.



2. Click the **Next** button to move to the next step in the process.

3. When the message **The import process is complete** displays, click the **OK** button to complete the import process.

Importing Excluded Resources

Follow the steps in this section to import resources that were excluded when importing a Ross file:

1. From the **Module** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Import Data** button to open the Ross Import window.
3. From the **Database** drop-down list, select the appropriate database.
4. Click the **Import from Previous Exclusions** option under Import Type.
5. From the **Import Incident** drop-down list, select the incident for which the resources were excluded.
6. Click the **Load Data** button to begin the import process for the excluded resources.
7. Complete the remaining import steps listed under the **Import Steps** area on the Ross Import window.

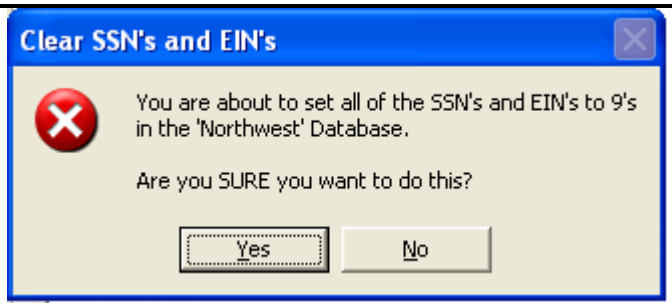
Purging Social Security Numbers

I-Suite data contains private and personal information including **Social Security Numbers** (SSN) and **IRS Federal Employer Tax ID Numbers** (EIN). Before publishing any report that might jeopardize this private data, you must remove this sensitive information from the I-Suite database.

Important Note: The following procedure will permanently remove the SSN's and EIN's from the database. If this information is still needed, make sure you create a copy of the database before purging the SSN’s and EIN’s from the current I-Suite database.

Follow the steps in this section to run the purge process:

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Purge SSN/EIN** button to display the **Clear SSN's and EIN's** window. The message on this window indicates that running this option will change all of the SSN's and EIN's to 9's.



3. Click the **Yes** button to continue. A second **Clear SSN's and EIN's** window displays. This window is to confirm that you really want to run this procedure.

Because the purge process cannot be reversed, two warning messages display before you can run the procedure.

4. Click the **Yes** button to continue. When the process is complete, the message **Update Complete** displays.
5. Click the **OK** button to close the window.

Exporting I-Suite Data Files

This section explains how to create and then export Injury/Illness I-Suite data files to the Data Repository. At each team transition and at the end of an incident, upload all I-Suite data files to the Data Repository.

You must have a **DMS User Name** and **Password** to access the repository site. Contact your **Incident Commander** or the **I-Suite Help Desk** for more information.

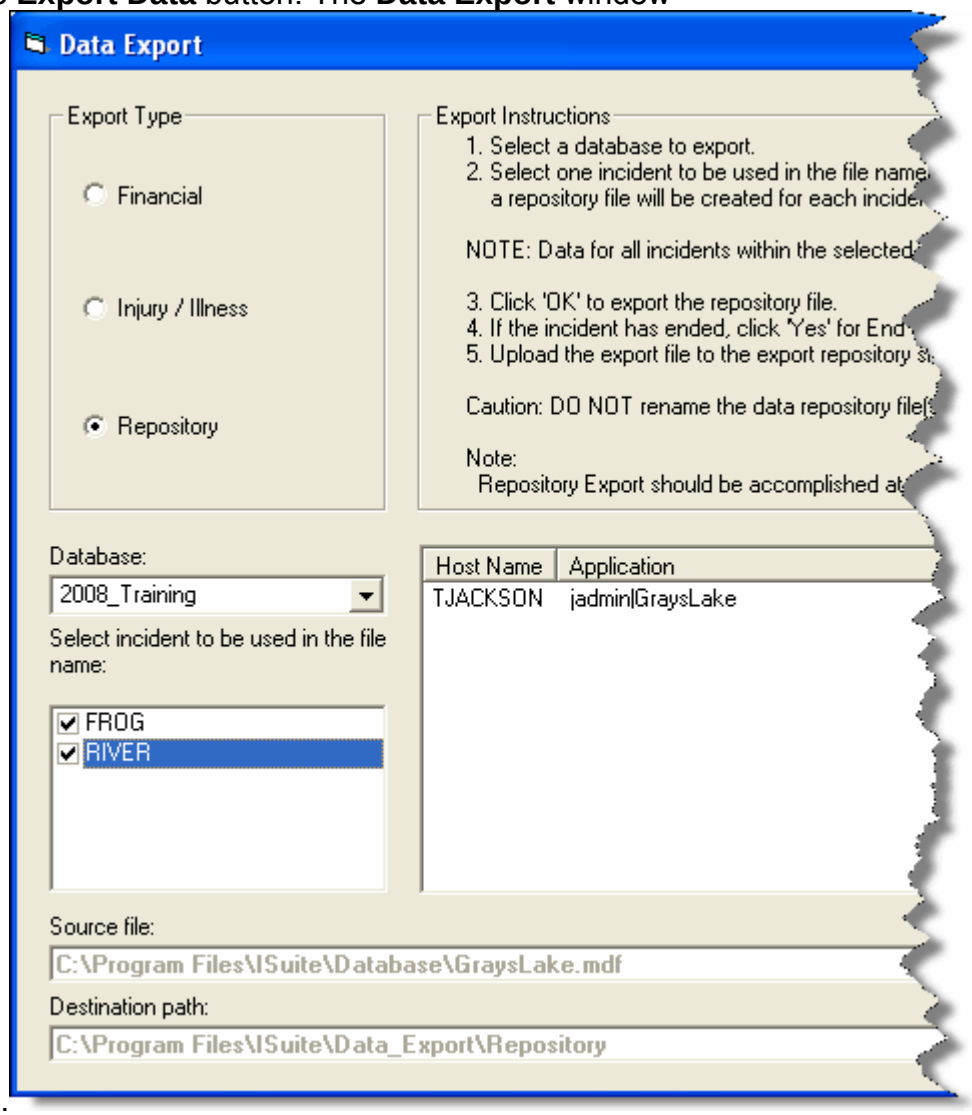
Creating a Data Repository File

Follow the steps in this section to create a **Data Repository** file:

SSN/EIN's are automatically purged from the Repository file.

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.

2. Click the **Export Data** button. The **Data Export** window



displays.

3. Under **Export Type**, select **Repository**.
4. From the **Database** drop-down list, select the database for which you are creating the repository.
4. Under **Select incident to be used in the file name**, click to check the checkbox next to the incident to use in the file name. If you select more than one incident, multiple files will be created with those file names.

   NOTE: Each repository file that is created will contain data for all incidents within the selected database.
5. Click the **OK** button to create the **Repository** file.
6. When the **End of Incident** window displays, identify whether this is the end of the incident. If it is the end of the incident, click the **Yes** button. If it is not the end of the incident, click the **No** button.

7. When the system has finished creating the repository file, a **Repository Files Created** window displays, click the **OK** button to close the window.
8. Click the **Close** button on the **Data Export** window to close the window.

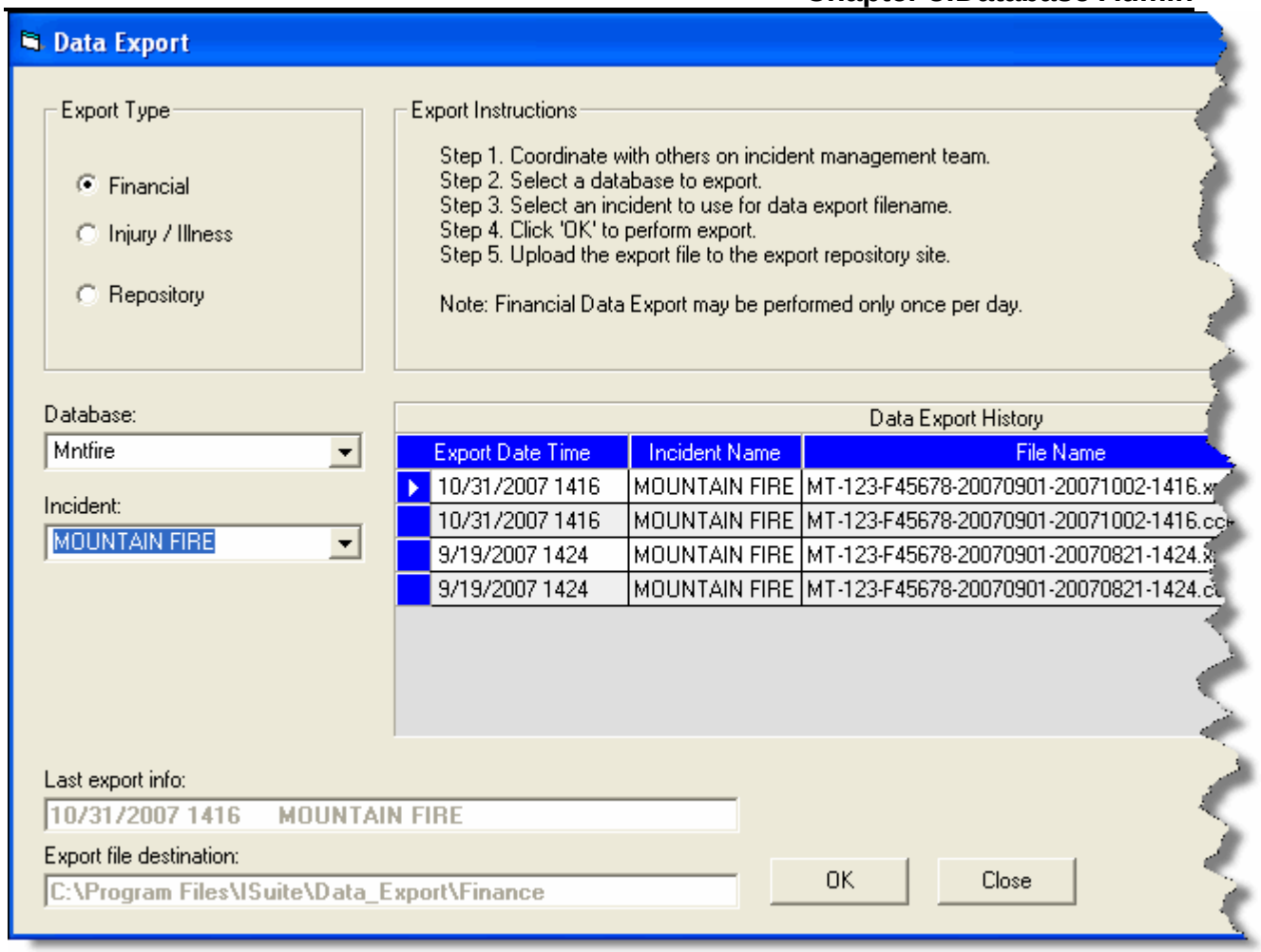
The file is exported to **C:\Program Files\ISuite\Data_Export**Repository.

Creating a Finance Data Export File

Follow the steps in this section to create a **Finance Data Export** File:

Make sure you coordinate with others on the incident management team before creating a finance data export file. This should be done after accruals are finalized for the day. The procedure will export finalized accrual data – **OF-288** original invoices for casual hires and **OF-286** original invoices that have been printed for payment. Once data has been exported, the data is locked and can no longer be changed. This means that **OF-286** and **OF-288** original invoices cannot be deleted 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**.

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Export Data** button to open the **Data Export** window.



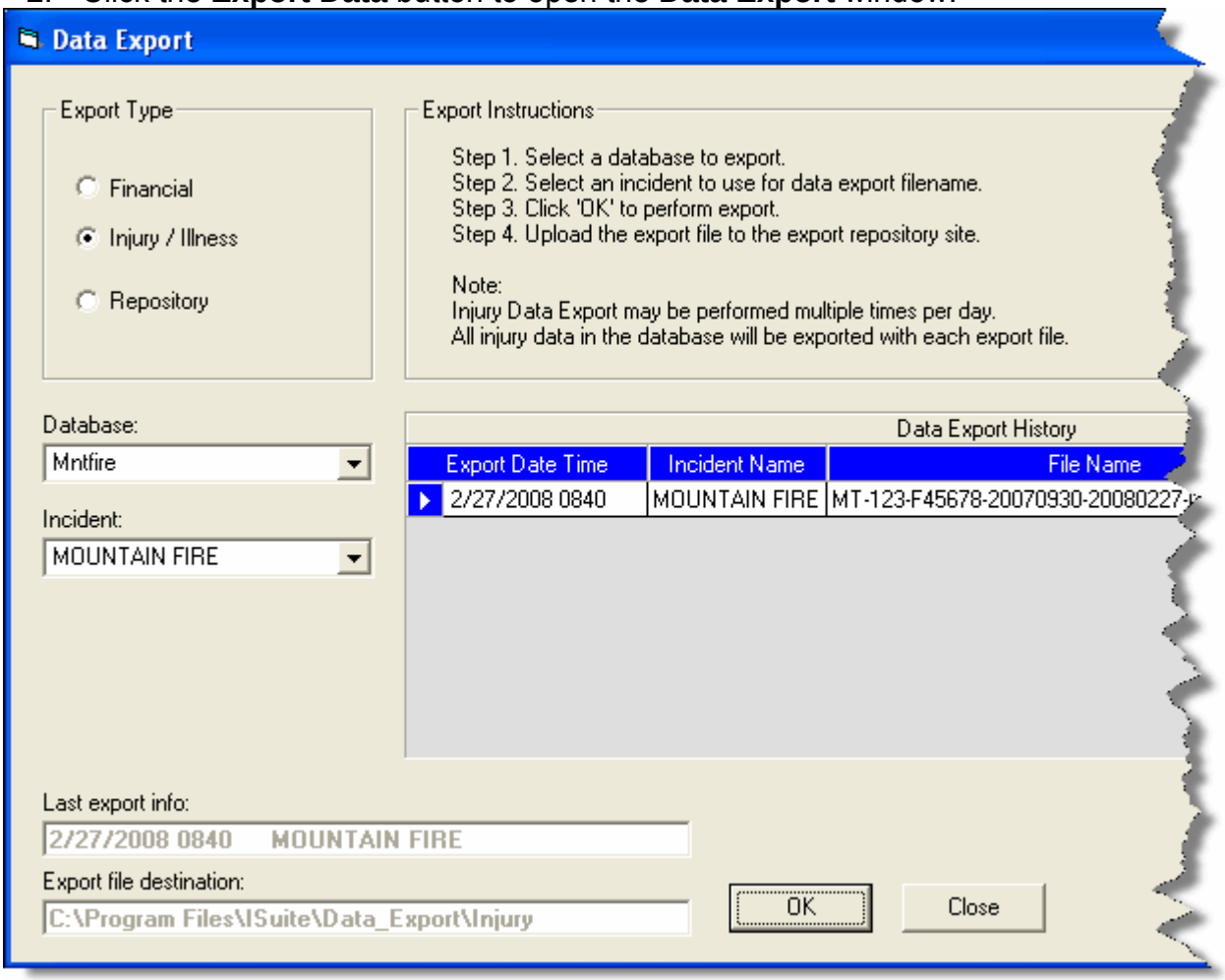
3. Click the **Financial** option under **Export Type**.
4. From the **DataBase** drop-down list, select the database for which you are creating the export file.
5. From the **Incident** drop-down list, select the incident for which you are creating the export file.
6. Click the **OK** button to create the export file.
7. When the warning displays indicating that the records will be locked after the export occurs, click the **OK** button to continue with the export process.
8. When the export is complete, the **Data Export** window redisplays with the exported file listed in the **Data Export History** frame. Click the **Close** button on the **Data Export** window to close the window.

The file is exported to **C:\Program Files\ISuite\Data_Export\Finance**.

Creating an Injury/Illness Export File

Follow the steps in this section to create an **Injury/Illness Export** file:

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Export Data** button to open the **Data Export** window:



3. Click the **Injury/Illness** option under **Export Type**.
4. From the **DataBase** drop-down list, select the database for which you are creating the export file.
5. From the **Incident** drop-down list, select the incident for which you are creating the export file.
6. Click the **OK** button to create the export file.
7. When the export is complete, the **Data Export** window redisplays with the exported file listed in the **Data Export History** frame. Click the **Close** button on the **Data Export** window to close the window.

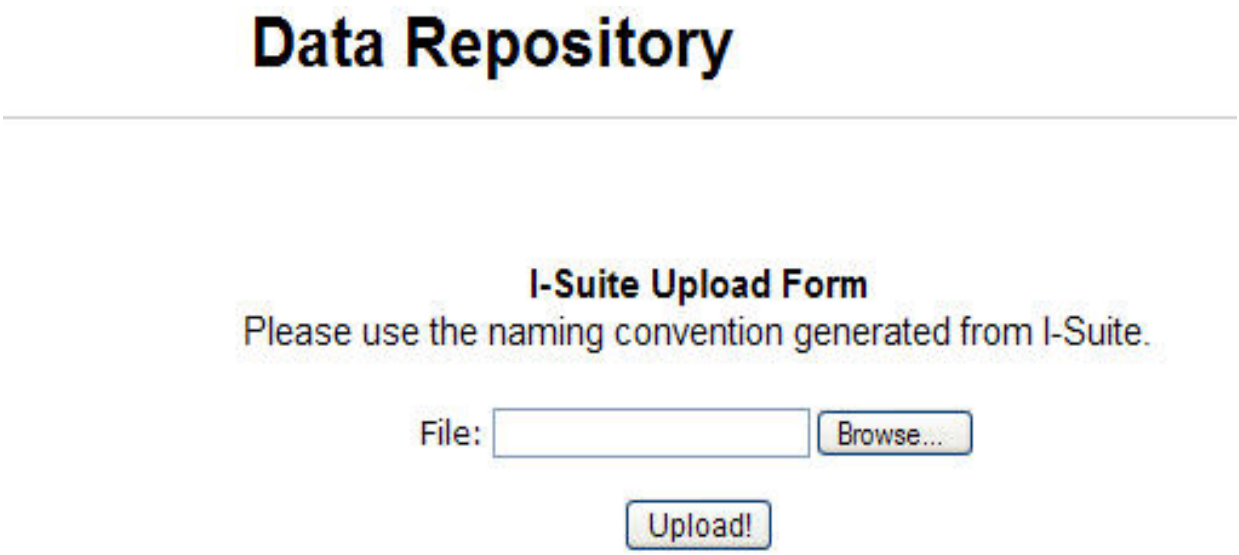
The file is exported to **C:\Program Files\ISuite\Data_Export\Injury**

Uploading the Data Repository File

Follow the steps in this section to upload a data file after you create it:

1. Start your Internet browser.
2. In the **Address** box, type **isuite.nwcg.gov** to open the I-Suite Web page.
3. On the **Welcome to I-Suite** web page, click the **Data Repository** option.
4. When the **Security Alert** window displays, click the **Yes** button to continue with the upload process. A **Connect to isuite.nwcg.gov** window displays.

5. Enter your **DMS User Name** and **DMS Password**. Then click the **OK** button. The **I-Suite Upload Form** page displays.

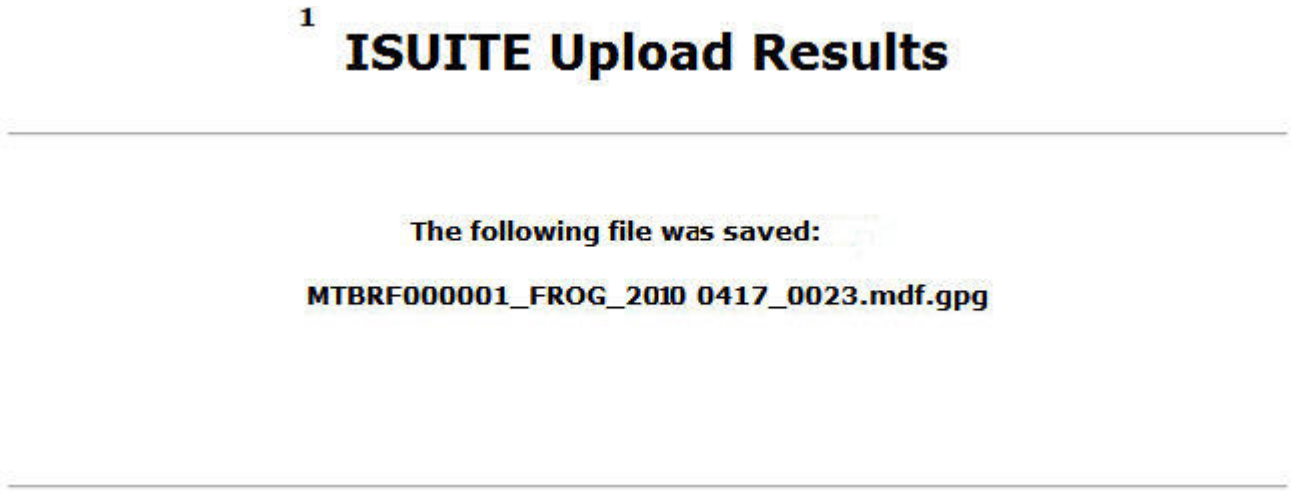


6. Click the **Browse** button next to the **File** field. Use the window that displays to locate and select the appropriate data repository file.

The default folder location for saving repository files is **C:\Program**

Files\ISuite\Data_Export\Repository.

8. Click the **Upload** button. When the data repository files have finished uploading, the **ISUITE Upload Results** screen displays.



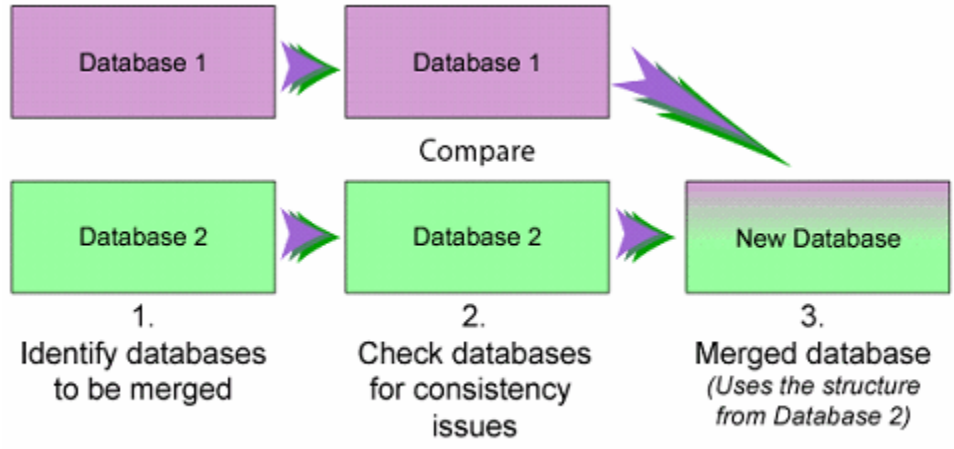
9. Click the **Back** button on your Internet browser to upload additional data repository files, or close your browser, as appropriate.

Merging Databases

This section explains how to merge two databases into one database.

For information on combining incidents within the same database, see Combining Incidents in the Same Database.

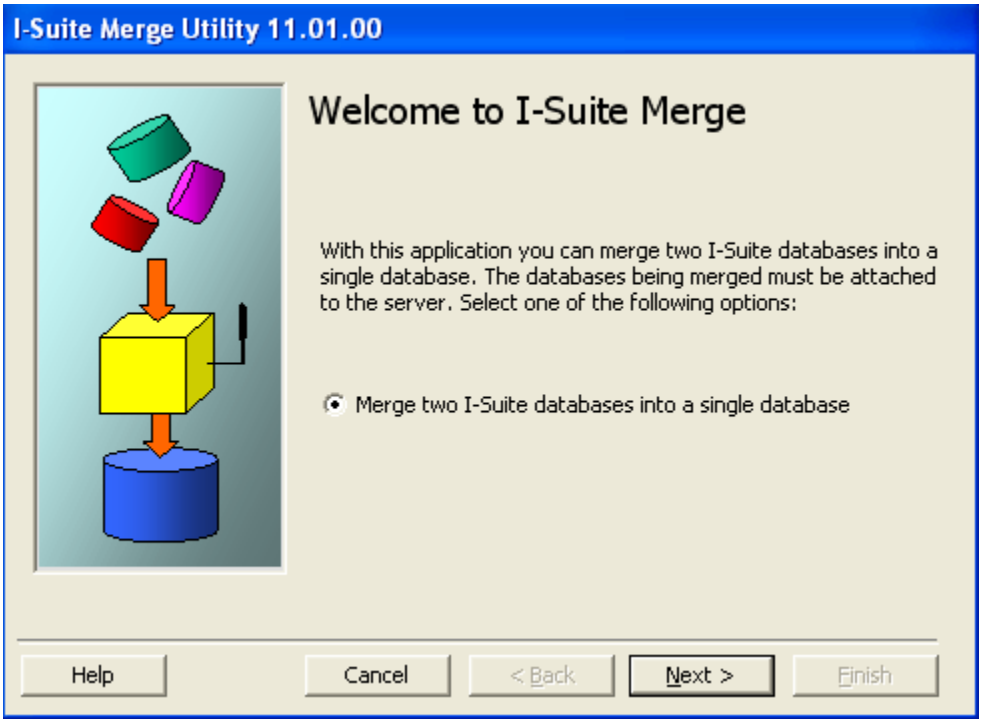
The following graph shows how this process is done:



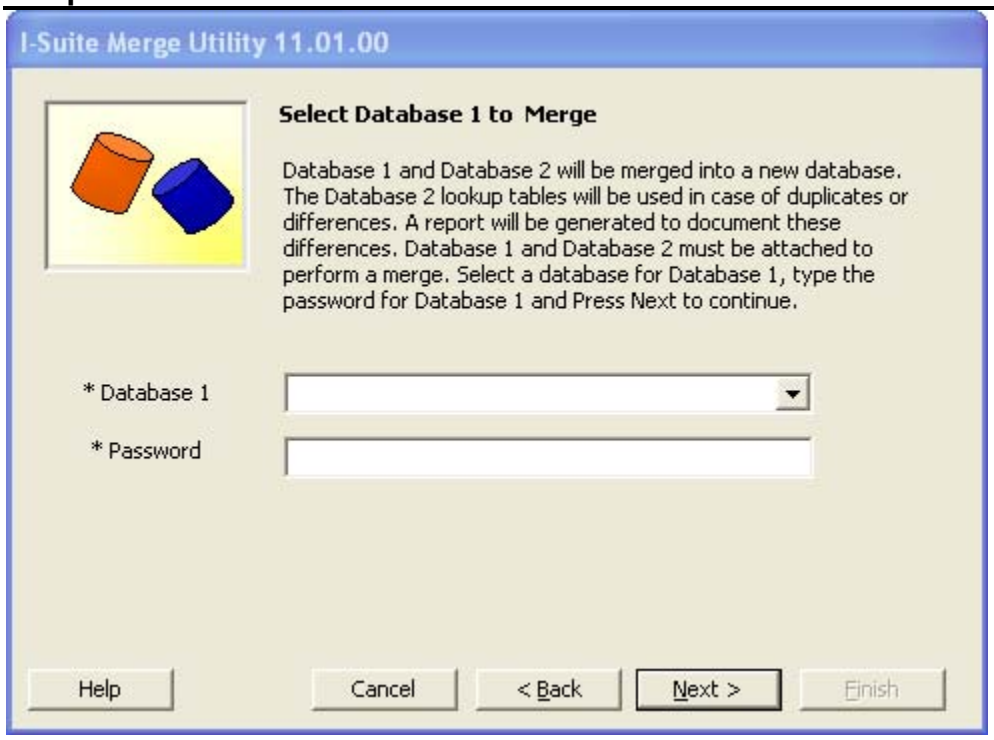
Follow these steps to merge two databases:

WARNING: Make sure all Cost Accruals are finalized and exported before merging the databases. If the Cost Accruals have not be finalized and exported before merging the databases, the Cost Accruals may not be accurate the next time you perform a Cost Accrual Extract.

1. From the **Modules** menu, select the **Database Admin** option to open the **Database Admin** window.
2. If needed, **Attach** the databases that you plan to merge. See "Attaching an Incident Database"
3. Click the **Merge** button on the **Database Admin** window to open the Merge wizard. Click the **Next** button to continue.

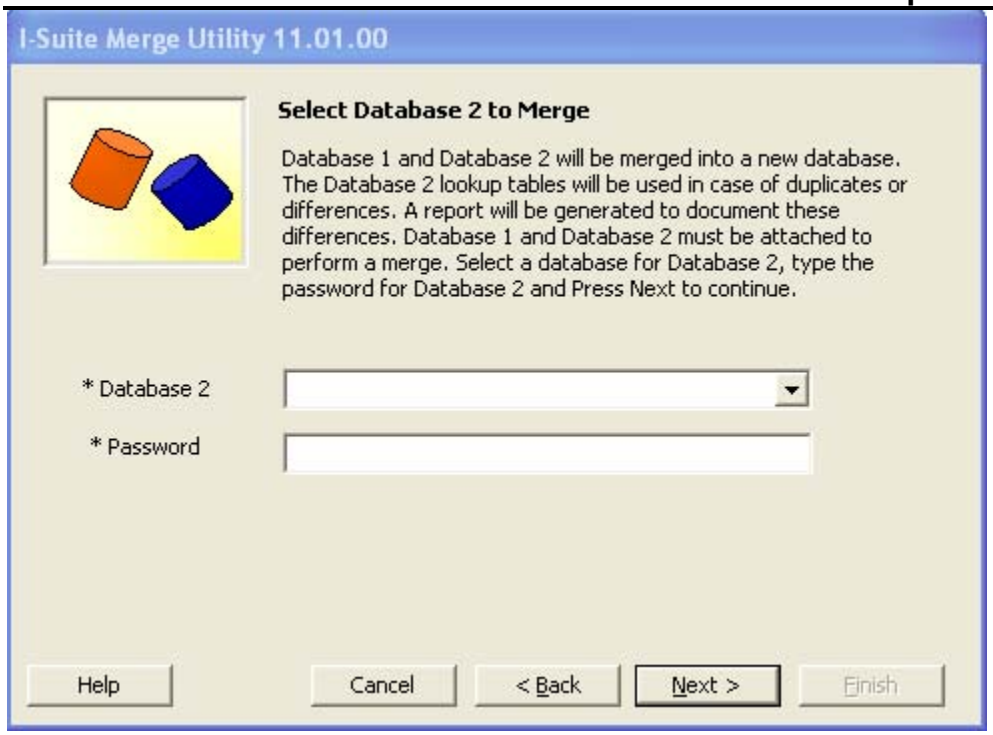


4. From the **Database 1** drop-down list, select the first database to include in the merge. Then enter the database's **Password**. Click the **Next** button to continue.



5. On the **Select Database 2 to Merge** window, select the second database to include in the merge from the **Database 2** drop-down list. Then enter the database's **Password**. Click the **Next** button to continue.

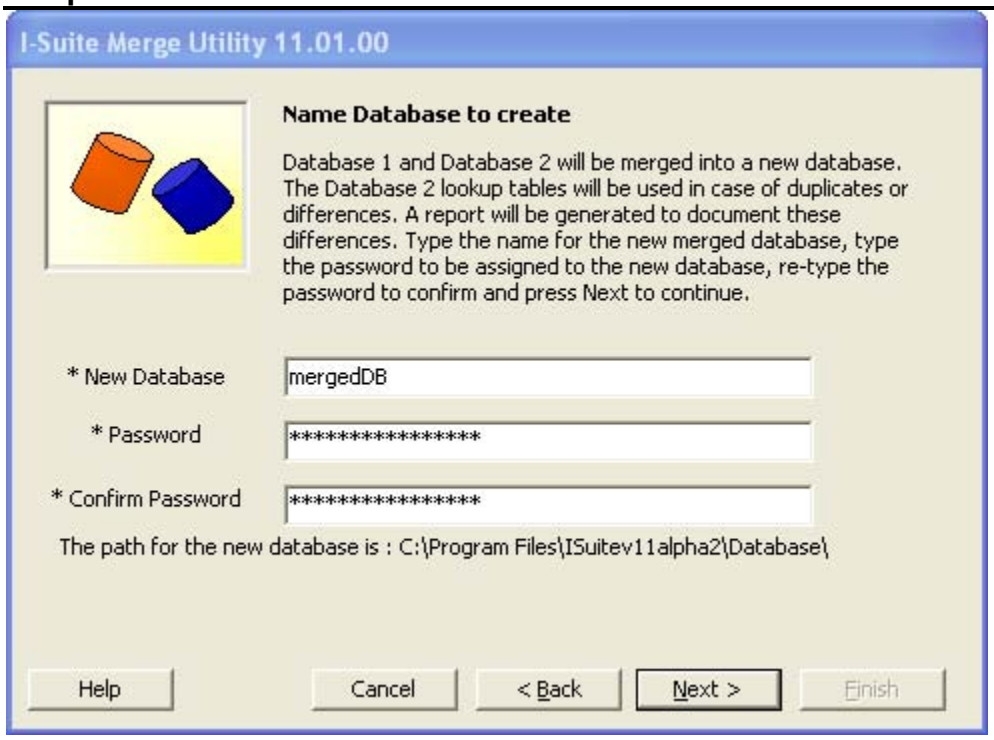
The system uses the **Database 2 Lookup Tables** if there are duplicates or differences in the merged databases.



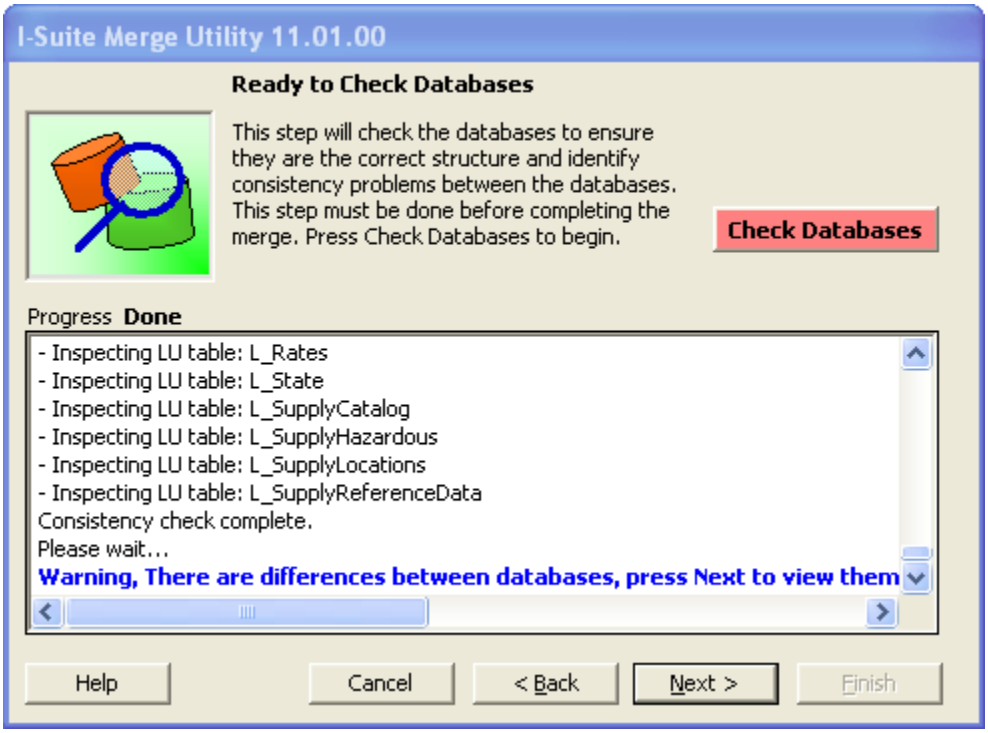
If either of the databases that are being merged have Cost Accrual Extracts that have not been exported, a warning message displays indicating that all accruals should be finalized and exported before merging the databases. Click the **OK** button to close the window. To cancel the merge process, click the **Cancel** button on the I-Suite Merge Utility window. After you have finalized and exported the Cost Accruals, you can restart the merge process.

6. On the **Name Database to Create** window, enter a name for the **New Database**. Then enter a **Password** for the merged database. Enter the password a second time in the **Confirm Password** box to ensure it was entered correctly. Click the **Next** button to continue.

If there are open connections to one of the databases, a warning displays. Click the **Yes** button to close the connections and continue with the process. If you want to cancel the process, click the **No** button.



7. On the **Ready to Check Databases** window, click the **Check Databases** button.



8. The **Progress Label** identifies the percentage of the **Check Databases** process that is complete. When the process is complete, the label changes to **Done**.

9. Complete one of the following based on the merge results:

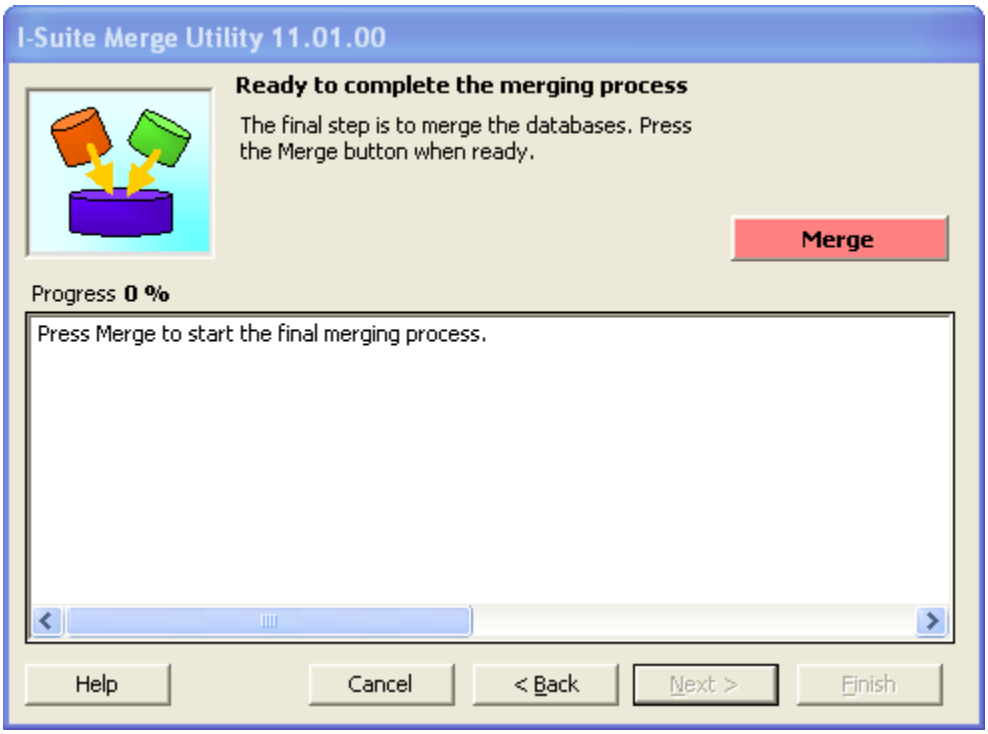
a. If the message **Warning, there are differences between databases, press Next to view them** displays, click the **Next** button. This allows you to review, print and analyze the differences. Click the **Close** button to continue with the process.

Generally, you do not need to perform any manual editing, because differences are handled through the merge process.

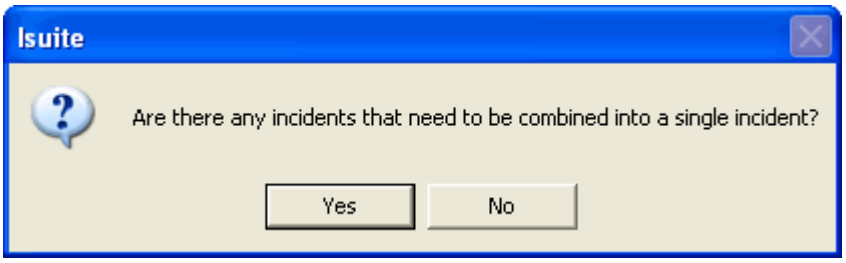
When merging a prior year to a current year database, it is common to see differences, because of changes made to the standard database. To maintain the integrity of your data, make sure you print the list of differences to analyze later.

b. If the message **Done, no differences found Press Next to complete the merge** displays, click the **Next** button.

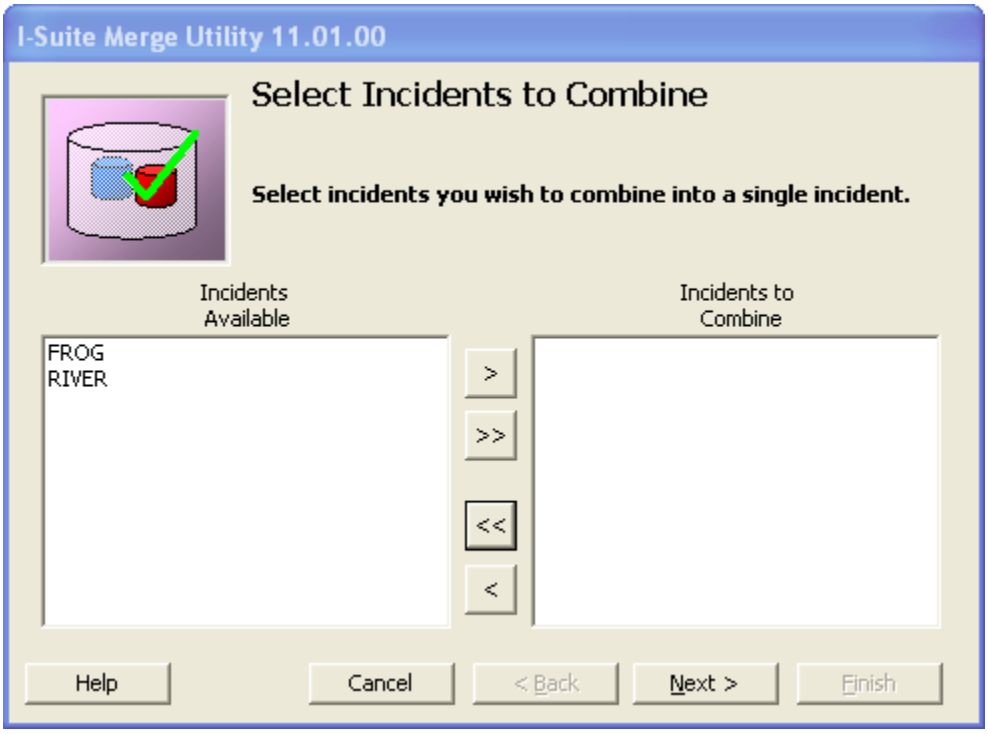
10. When the **Ready to Complete the merging process** window displays, click the **Merge** button.



11. The **Progress Label** identifies the percentage of the **Merge** process that is complete.
12. Once the merge is complete, click the **Next** button.
13. When the question **Are there any incidents that need to be combined into a single incident?** displays, click **No** to keep all of the incidents separate and proceed to step 14. Click **Yes** to select which incidents to combine in the merged database.

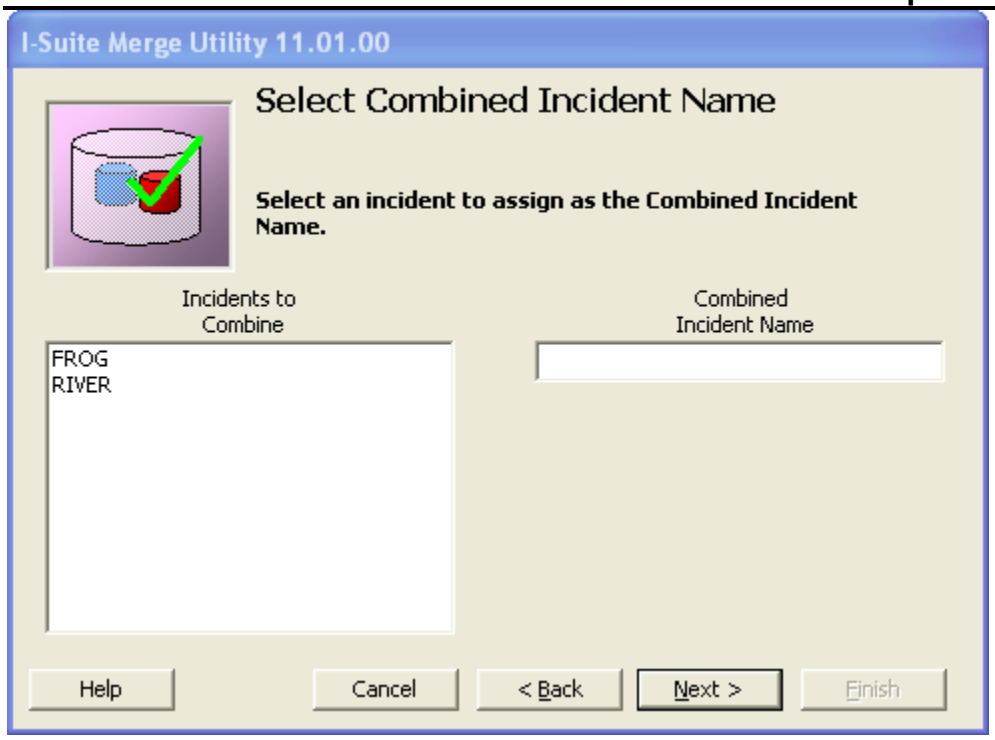


a. If you selected **Yes** to combine incidents, the **Select incidents to Combine** window displays. In the **Incidents Available** frame, select the incidents to combine, and then click the **>** button. To combine all incidents into one, click the **>>** button.



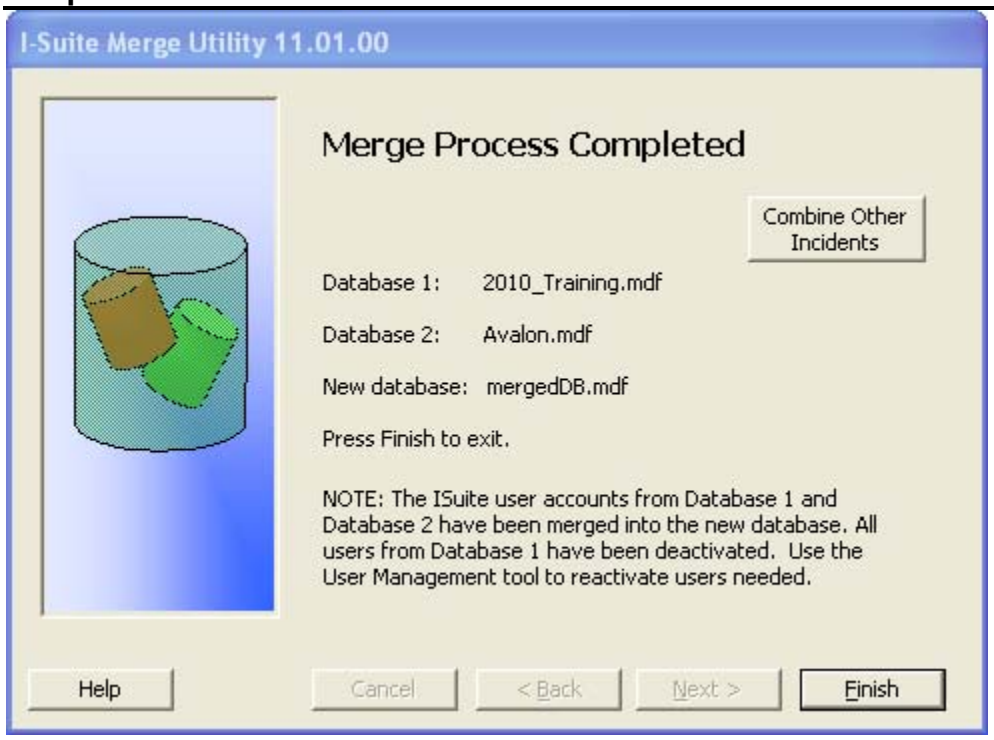
b. Once all of the Incidents you want to combine are listed in the **Incidents to combine** frame, click the **Next** button.
c. From the Incidents to Combine frame, select an incident into which the other incidents will be merged. The name of the selected incident displays in the **Combined Incident Name** field. Click the **Next** button.

You must select an Incident to assign as the Combined Name. If you leave the **Combined Incident Name** box blank and click the **Next** button, a message displays indicating that you must select an Incident for the Combined Incident Name.



d. If there are Resources that are potentially duplicate in the merged incident, a **Potential Duplicate Resources Report** displays. You can print, preview or export this report. After viewing the report, close it to continue with the merge process.

14. On the **Merge Process Completed** window, you can either click the **Finish** button to complete the merge process or click the **Combine Other Incidents** button if you need to merge additional incidents together. When you click the **Combine Other Incidents** button, repeat steps **13 a-d** to merge the additional incidents together.



Combining Incidents in the Same Database

Follow the steps in this section to combine multiple incidents that are in the same database together to form one incident in a separate database.

WARNING: Make sure all Cost Accruals are Finalized and Exported before merging the databases. If the Cost Accruals have not be Finalized and Exported before merging the databases, the Cost Accruals may not be accurate the next time you perform a Cost Accrual Extract.

1. Create a New/Blank Database (See Creating a New Blank Database).

When combining incidents in the same database, you must first merge your existing database into a new blank database. You cannot perform this process without first creating the New/Blank database.

2. Run the merge process (See Merging Databases).
3. Select the New Blank Database as Database 1.
4. Select the existing database as Database 2.

If you do not select the existing database as Database 2, the Kind Codes and Rates in the merged database may not be correct.

5. Complete the merge steps 6 - 14.

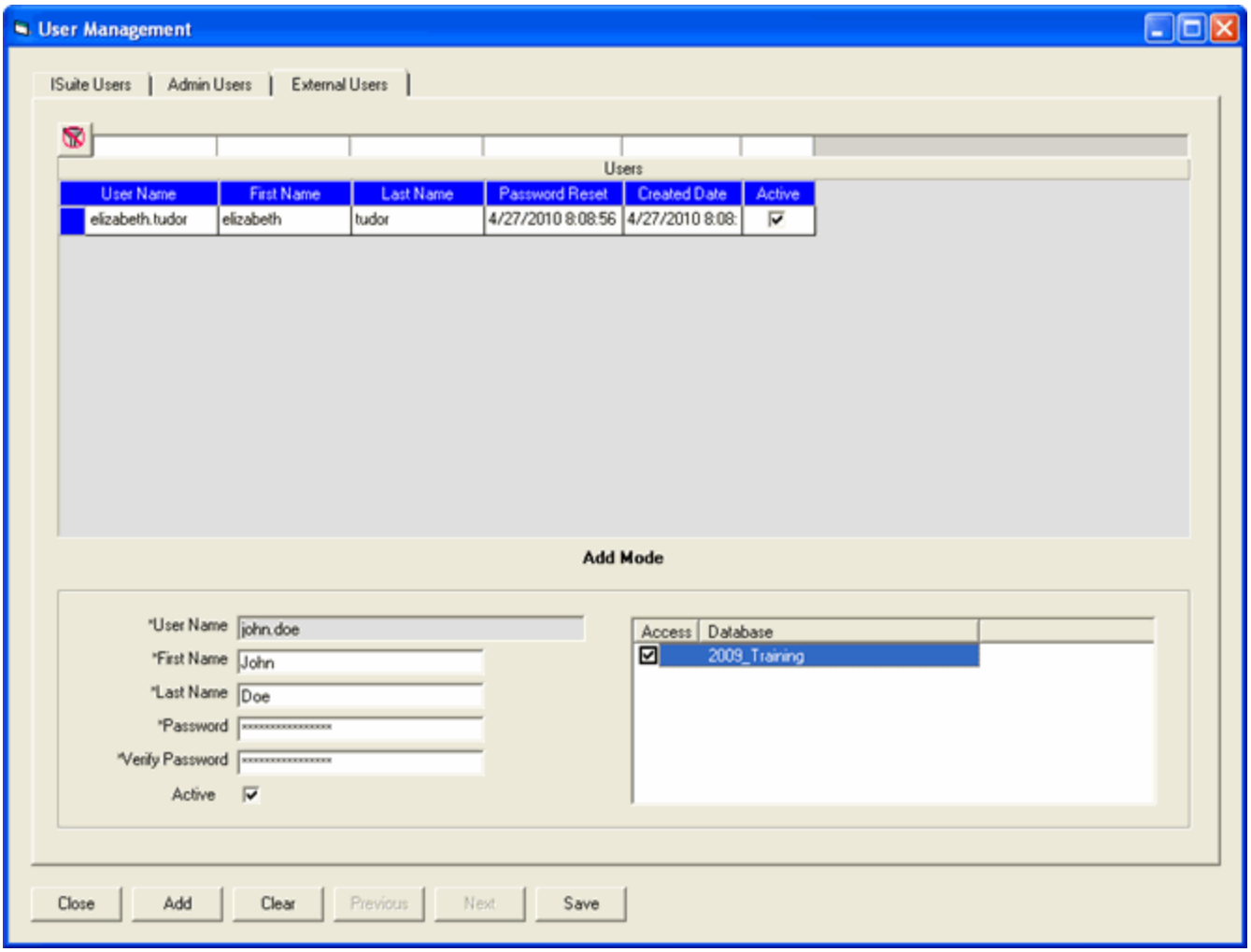
External User Account Management

This section explains how to manage **External User Accounts**. Use an **External User Account** to access an I-Suite database with an external application.

Creating an External User Account

Follow the steps in this section to set up an **External User Account**:

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Users** button to open the **User Management** window.
3. Click the **External Users** tab to select it.



5. Enter the external user's **First Name**.
6. Enter the external user's **Last Name**.

The system automatically generates the **User Name** for the external account based on the **First Name** and **Last Name** that you enter.

7. Enter a **Password** for the external user account.

The user associated with the external user account should enter their own password into the **Password** box. Once a **Password** is assigned to an external user account, you cannot change it.

8. Verify the password in the **Verify Password** box.
9. To activate the external user account, click to check the **Active** checkbox

Only external user accounts with an **Active** status can access an I-Suite database in an external application.

10. In the **Access Database** area, click to check each database the external user account can access in the external application.
11. Click the **Save** button to save the external user account.

Changing an External User Account

Follow the steps in this section to make changes to an External User Account:

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Users** button to open the **User Management** window.
3. Click the **External Users** tab to select it.
4. Click the external user account you want to edit in the grid at the top of the tab.
5. Click the **Active** checkbox to either activate or deactivate the external user account.
6. Click to check or uncheck databases in the **Access Database** area to identify the databases the external user account can access in an external application.
7. Click the **Save** button to save any changes made to the external user account

Deleting an External User Account

Follow the steps in this section to delete an External User Account.

If you delete an external user account, that user will no longer be able to access any I-Suite databases in an external application.

1. From the **Modules** drop-down menu, select the **Database Admin** option to open the **Database Admin** window.
2. Click the **Users** button to open the **User Management** window.
3. Click the **External Users** tab to select it.
4. Click the external user account you want to delete in the grid at the top of the tab.
5. Click the **Delete** button at the bottom of the tab.
6. When the message **Are you sure you want to delete the external account** displays, click the **Yes** button to delete the account.

Database Admin Revision History

Revision Date	Revision Summary
2011-04-01	Revised instructions for the 11.01.00 version of I-Suite.
2010-04-27	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised instructions for the 9.01.00 version of I-Suite.
2009-02-13	Revised instructions for the 8.01.05 version of I-Suite.
2008-09-04	Revised instructions for the 8.01.04 version of I-Suite.
2008-06-16	Revised instructions for the 8.01.03 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Revised instructions for the 7.01.00 version of I-Suite.
2007-01-10	Revised instructions based on changes received for Training Manuals.
2006-12-04	Revised instructions by adding more detail and graphics.
2006-05-01	Instructions for new features of the Database Admin module.
2006-04-17	Instructions for new module of the new I-Suite 2006 application.
2005-03-01	Revised instructions for the new I-Suite website.
2004-10-26	Revised instructions for the new I-Suite Website and to reflect changes in procedures from the June and August 2004 I-Suite releases.
2004-09-22	Added instructions for importing ROSS data files into I-Suite.

Data Administration

The **Data Admin** section explains how to use **Data Admin** to manage incidents, accounting codes, and lookup tables. Information entered in **Data Admin** is shared with other I-Suite modules, including:

Topics in this section include the following:

- See "Manage Incident Data"
- See "Manage Lookup Tables"

Manage Incident Data

This section explains how to manage incident data.

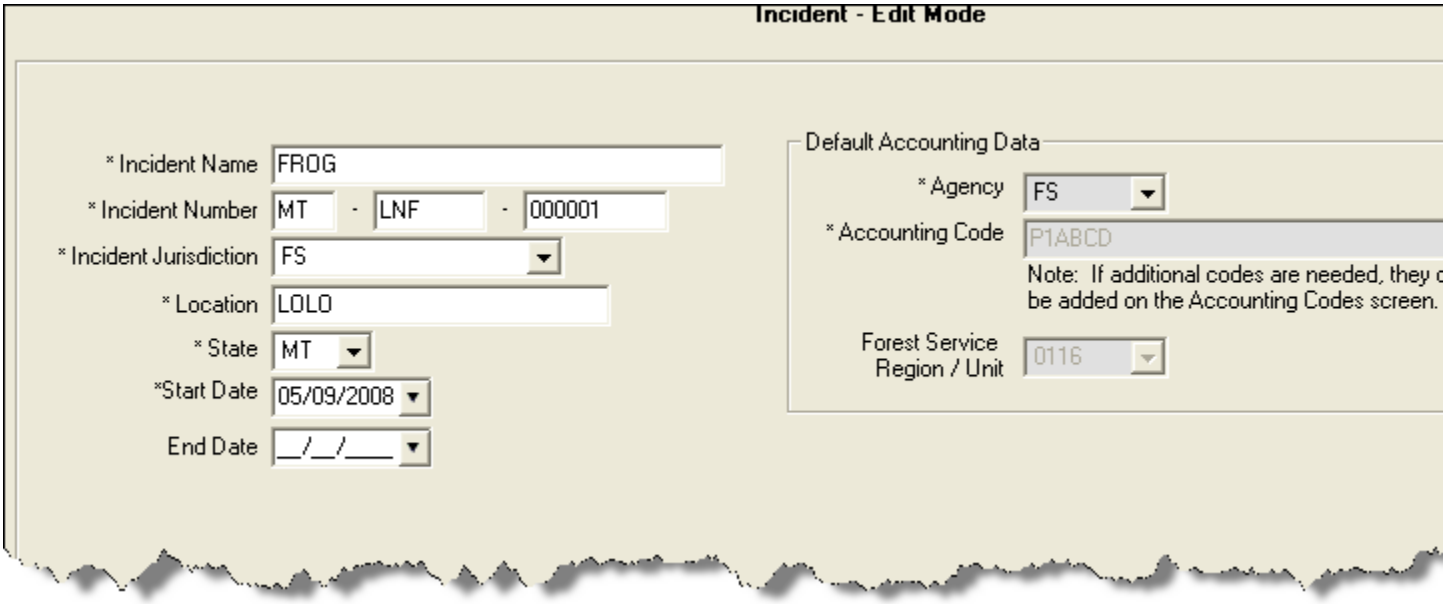
Adding Incident Data

Follow the steps in this section to add a new incident to the **Incident Data**:

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

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

1. From the **Modules** drop-down menu, select the **Data Admin** option. The **Data Admin** window displays.
2. Click the **Incident Data** tab.
3. Click **Incident** in the **Feature** box to display the **Incident** area at the bottom of the window.



4. In the **Incident Name** box, type the name to assign to the incident.
5. In the first **Incident Number** box, enter the two letter abbreviation for the state. In the second box, enter the Unit ID. In the third box, enter the number assigned to the incident.

The **Incident Number** must be unique to the database. If there is another incident in the database with the same **Incident Number**, an error message will display when you click the **Save** button and the record will not be saved.

6. From the **Incident Jurisdiction** drop-down list, select the agency that has jurisdiction for the incident.

The **Incident Jurisdiction** facilitates cost accrual category decisions.

7. Enter the **Location** of the incident.
8. From the **State** drop down list, select the state where the incident occurred
9. Enter the Incident **Start Date**.
10. When the incident has ended, you can define an end date in the **End Date** field. An entry in this field is not required.
11. From the **Agency Code** drop-down, select the agency to assign to the incident.

An **Agency** is required. You cannot define an **Accounting Code** until an **Agency** is selected.

12. In the **Accounting Code** box, enter the accounting code to assign to the incident.

You must first select an **Agency** before you can define an **Accounting Code**.

If the **Accounting Code** was defined for a different Incident in the database, a warning message displays when you click the **Save** button. If you still want to assign the **Accounting Code** to the incident, click the **OK** button on the message window.

13. 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.

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).

14. Click the **Save** button to save the new incident.

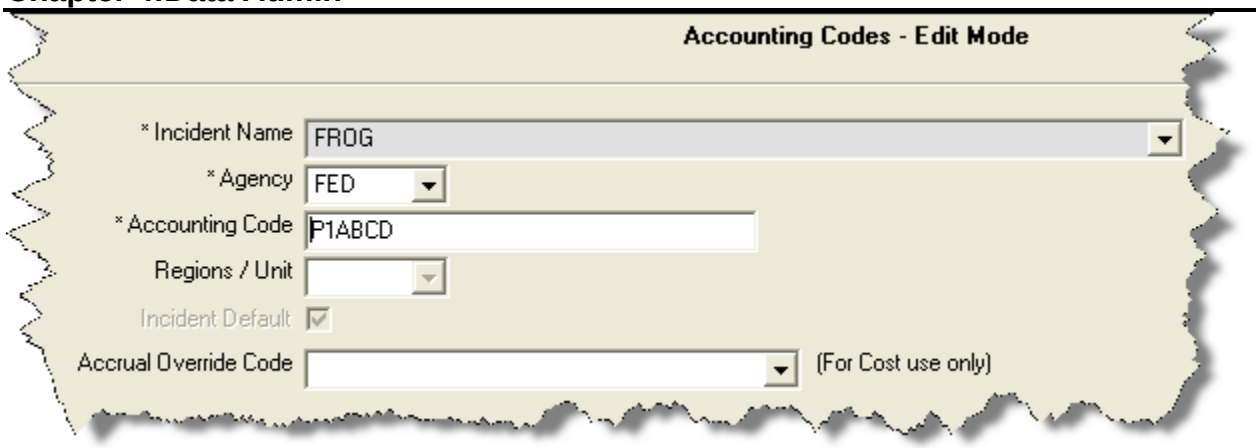
If you want to edit an existing incident, click the incident in the **DataAdmin** grid. Then make the appropriate changes to the incident.

When you are editing an incident, you cannot change the **Agency**, **Region/ Unit Code** or **Accounting Code** on the **Incident** window. You must make the changes on the **Accounting Codes** window.

Managing Accounting Codes

Use caution when adding or editing accounting codes, since changes in accounting codes will impact all users.

1. From the **Modules** drop-down menu, select the **Data Admin** option to open the **Data Admin** window.
2. Click the **Incident Data** tab.
3. Click the **Accounting Code** option under **Feature** to open the **Accounting Codes** area at the bottom of the window.



4. Select the incident for which you want to display accounting codes from the **Incident** drop-down list at the top of the window.
5. From the **Agency Code** drop down list, select the appropriate agency.
6. In the **Accounting Code** box, type the accounting code for the incident.

If the **Accounting Code** was defined for a different Incident in the database, a warning message displays when you click the **Save** button. If you still want to assign the **Accounting Code** to the incident, click the **OK** button on the message window.

When you add an accounting code for an incident that has an accounting code with the same agency already defined, you must confirm that you want to add an accounting code with the same agency for that incident when you save the accounting code.

7. If you selected the **FS Agency**, a **Regions / Unit Code** drop-down list is available. Select the appropriate region or unit code from this drop-down.
8. To set the new accounting code as the default accounting code for the selected incident, click to check the **Incident Default** checkbox.
9. If you want to assign an accrual override code to the accounting code for **Cost** purposes, select the code from the **Accrual Override Code** drop-down list.
10. Click the **Save** button to save the accounting code.

If you want to edit an accounting code, click the code in the **Accounting Codes** grid. Then make the appropriate changes to the code.

Manage Lookup Tables

Lookup Tables define the options available in drop-down lists within the I-Suite system. This section explains how to manage **Lookup Tables**.

When I-Suite is installed, the **Lookup Tables** contain **Standard** options, which cannot be edited. You can add new options to the **Lookup Tables** and edit any non-standard

options in the **Lookup Tables**. All of the options that were added to the **Lookup Tables** by a user are considered **Non-Standard** options.

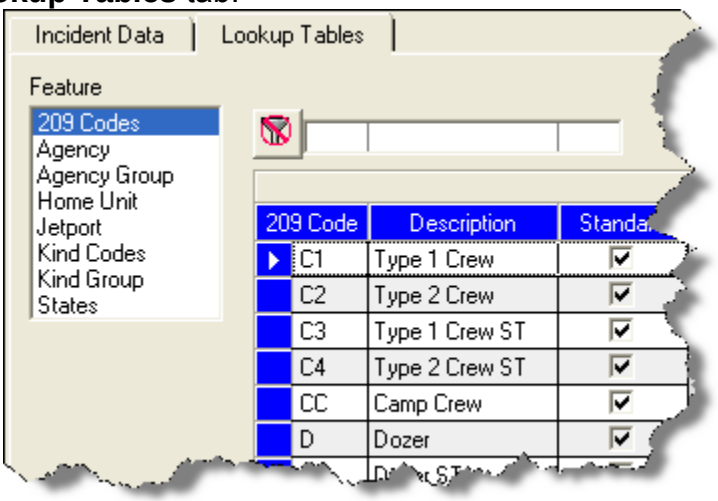
You cannot edit an option in a **Lookup Table** when the **Standard** checkbox is checked for a particular data item. **Standard** indicates that the row of data is standard in that version of the database

Use caution when making any changes to lookup tables since changes to lookup tables will impact all users.

Managing Lookup Tables

Follow the steps in this section to manage lookup tables:

1. From the **Modules** drop-down menu, select the **Data Admin** option. The **Data Admin** window displays.
2. Click the **Lookup Tables** tab.



3. Under **Feature**, click a lookup table. When you select a lookup table, the system automatically displays codes defined for that table in the grid to the right. Text boxes for the lookup table display at the bottom of the window.
4. Click a code in the grid, to display information for that code in the text boxes at the bottom of the window.
5. To edit the information defined for a code, enter the appropriate data into the text boxes.

   To create a new code, do not select a code in the grid. Then enter the appropriate information for the new code in the boxes at the bottom of the window.
6. After entering all required information and any optional information, click the **Save** button to save your changes.

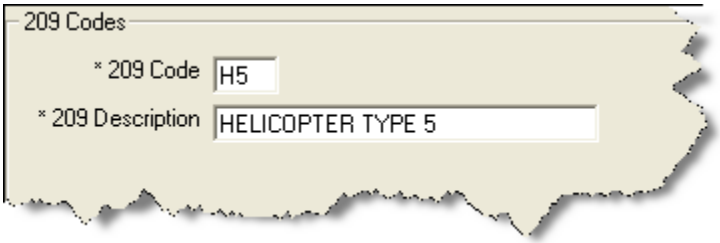
You cannot edit lookup data when the **Standard** option is checked for a particular data

item. **Standard** indicates that the row of data is standard in that version of the database.

209 Codes Lookup Table

Follow the steps in this section to add a new **209 Code** to the **Lookup** table:

1. From the **Modules** drop-down menu, select the **Data Admin** option. The **Data Admin** window displays.
2. Click the **Lookup Tables** tab to select it.
3. Under **Feature**, click **209 Codes**. A **209 Code** area displays at the bottom of the window:

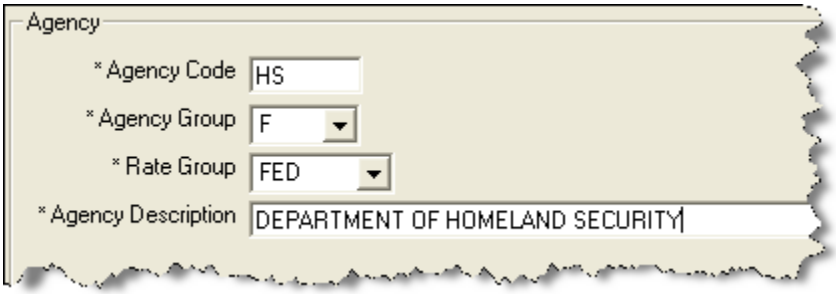


4. Click the **Add** button.
5. In the **209 Code** box, type the new code.
6. In the **209 Description** box, type a description of the 209 code.
7. Click the **Save** button to save the 209 code to the **Lookup** table.

Agency Codes Lookup Table

Follow the steps in this section to add a new **Agency Code** to the **Lookup Table**:

1. From the **Modules** drop-down menu, select the **Data Admin** option. The **Data Admin** window displays.
2. Click the **Lookup Tables** tab to select it.
3. Under **Feature**, click **Agency**. An **Agency** area displays at the bottom of the window:



4. Click the **Add** button.
5. In the **Agency Code** box, type the code to assign to the agency.
6. From the **Agency Group** drop-down list, select the appropriate group for the agency.

6. From the **Rate Group** drop-down list, select one of the following rate groups to assign to the agency:

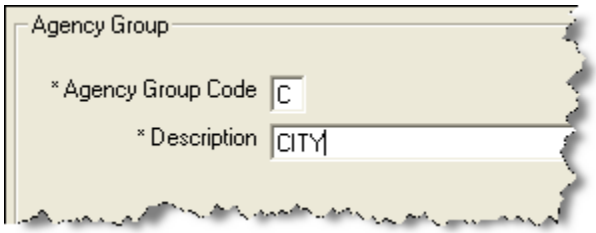
- **CITY** - City Rate Group
- **CNTY** - County Rate Group
- **CONT** - Contract Rate Group
- **FED** - Federal Rate Group
- **OTH** - Other Rate Group
- **ST** - State Rate Group

7. In the **Agency Description** box, enter a description of the agency.
8. Click the **Save** button to save the agency code to the **Lookup** table.

Agency Group Lookup Table

Follow the steps in this section to add a new group to the **Agency Group Lookup Table**.

1. From the **Modules** drop-down menu, select the **Data Admin** option. The **Data Admin** window displays.
2. Click the **Lookup Tables** tab to select it.
3. Under **Feature**, click **Agency Group**. An **Agency Group** area displays at the bottom of the window.

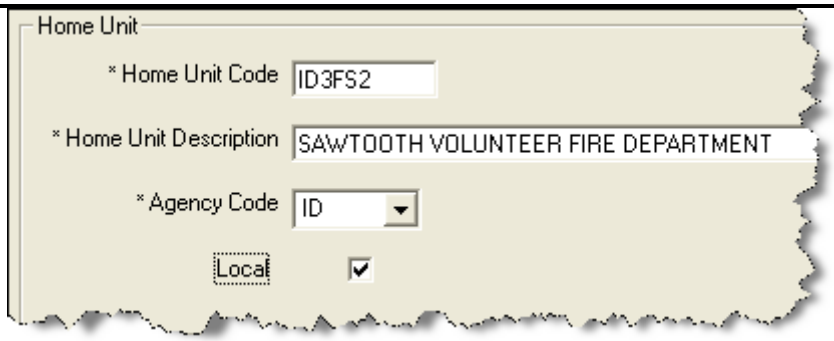


4. Click the **Add** button.
5. In the **Agency Group** box, type the code to assign to the group. The code can only contain one character.
6. In the **Description** box, type a description of the **Agency Group**.
7. Click the **Save** button to save the **Agency Group** to the **Lookup Table**.

Home Unit Lookup Table

Follow the steps in this section to add a new **Home Unit** to the **Lookup Table**:

1. From the **Modules** drop-down menu, select the **Data Admin** option. The **Data Admin** window displays.
2. Click the **Lookup Tables** tab to select it.
3. Under **Feature**, click **Home Unit**. A **Home Unit** area displays at the bottom of the window.

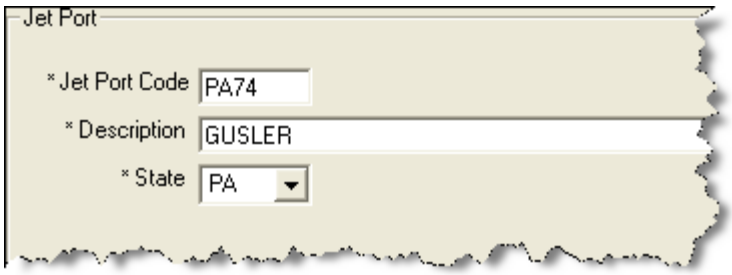


4. Click the **Add** button.
5. In the **Home Unit** box, type the code to assign to the home unit.
6. In the **Home Unit Description** box, type a description of the home unit.
7. From the **Agency Code** drop-down list, select the agency to assign to the home unit.
8. If the **Home Unit** is **Local**, click to check the **Local** checkbox.
9. Click the **Save** button to save the **Home Unit** to the **Lookup Table**.

Jetport Lookup Table

Follow the steps in this section to add a new **Jetport** to the **Lookup Table**:

1. From the **Modules** drop-down menu, select the **Data Admin** option. The **Data Admin** window displays.
2. Click the **Lookup Tables** tab to select it.
3. Under **Feature**, click **Jetport**. A **Jetport** area displays at the bottom of the window.



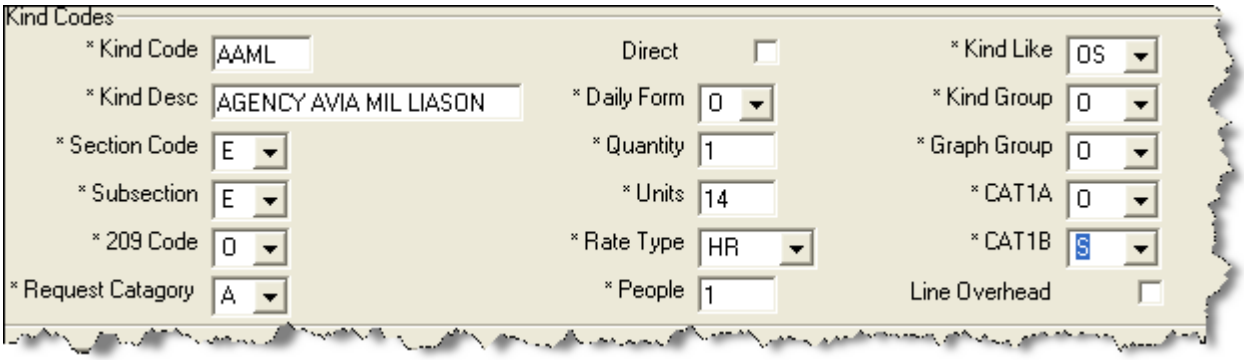
4. Click the **Add** button.
5. In the **Jetport Code** box, type the code to assign to the jetport.
6. In the **Description** box, type a description of the jetport.
7. From the **State** drop-down list, select the state where the jetport is located.
8. Click the **Save** button to save the **Jetport** to the **Lookup Table**.

Kind Codes Lookup Table

Follow the steps in this section to add a new **Kind Code** to the **Lookup Table**:

A straightforward rule-of-thumb when creating a new kind code is to identify a resource similar in values to the new kind and use that code for a model. For example, an ATV is similar to a four-wheeler, or a golf cart is like a potable-water tender.

1. From the **Modules** drop-down menu, select the **Data Admin** option to open the **Data Admin** window.
2. Click the **Lookup Tables** tab to select it.
3. Under **Feature**, click **Kind Codes**. A **Kind Codes** area displays at the bottom of the window.



4. Find a resource that is similar to the new **Kind** you are creating and write down the specific **Quantity**, **Units**, and **Categories** assigned to this resource.
5. Click the **Add** button.
6. In the **Kind Code** box, type the code to assign to the resource kind.
7. In the **Kind Desc** box, type a description of the kind code.
8. From the **Section Code** drop-down list, select one of the following sections to assign to the kind code:

A - Area Command
C - Command
F - Finance
L - Logistics
M - Medical
O - Operations
P - Plans

9. From the **Subsection** drop-down list, select one of the following subsections to assign to the kind code:

A - Area Command
C - Command Staff
E - Expanded Dispatch
F - Finance Section - Cost Unit
F - Finance Section - Comp/Claims Unit
F - Finance Section - Procurement Unit
F - Finance Section - Time Unit
F - Finance Section - Other
L - Logistics Section - Communications Unit
L - Logistics Section - Food Unit

L - Logistics Section - Ground Support Unit
L - Logistics Section - Medical Unit
L - Logistics Section - Security
L - Logistics Section - Supply Unit
L - Logistics Section - Other
O - Operations Section - Air Ops
O - Operations Section - Divisions
O - Operations Section - Other
P - Plans Section - Demobilization Unit
P - Plans Section - Documentation Unit
P - Plans Section - Resources Unit
P - Plans Section - Situation Unit
P - Plans Section - Other

When assigning a Subsection to a Kind code, make sure you select the right code, based on the Subsection Description. For example, to assign a Food Unit subsection to a kind, select the L code with the Logistics Section - Food Unit description rather than the L code with the Logistics Section - Facilities Unit description.

10. From the **209 Code** drop-down list, select one of the following 209 codes to assign to the kind code:

C1 - Type 1 Crew
C2 - Type 2 Crew
C3 - Type 3 Crew ST
C4 - Type 4 Crew ST
CC - Camp Crew
D - Dozer
DS - Dozer ST
E - Engines
ES - Engines ST
H1 - Helicopter Type 1
H2 - Helicopter Type 2
H3 - Helicopter Type 3
H4 - Helicopter Type 4
O - Overhead
W - Water Tender

Additional, non-standard codes may also be available in the **209 Code** drop-down list.

11. From the **Request Category** drop-down list, select one of the following request categories to assign to the kind code:

A - Aircraft
C - Crew
E - Equipment
I - Initial Attack

O - Overhead
S - Supply

12. If the kind is a **Direct Resource**, click to check the **Direct** checkbox. This option applies to the **Cost** module.
13. From the **Daily Form** drop-down, select one of the following daily forms to assign to the kind code:

A - Aircraft
E - Fire Engines
H - Helicopters
O - All Others
T - Airtankers

14. In the **Quantity** box, type the appropriate quantity for the kind code.
15. In the **Units** box, type the appropriate unit for the kind code.
16. From the **Rate Type** drop-down list, select the one of the following rates to assign to the kind code:

DAY - Daily Single Shift
DAY2 - Daily Double Shift
DAYN - Daily Non Hazard Rate
EA - Each
GAL - Gallons
GUAR - Guarantee
HR - Hourly Rate (Ave-Haz)
HRNH - Hourly Rate (Ave-Non-Haz)
MILE - Mileage
MISC - Misc Support
MNTH - Monthly
OT - Overtime
PERS - Person
RT - Regular Time
TRAN - Mob/Demobilization
UNIT - Units
WEEK - Weekly

17. In the **People** box, type the appropriate number of people for the kind code.
18. From the **Kind Like** drop-down list, select the kind code that is most like the one you are defining. The following codes are available in the drop-down list:

C3 - Hand Crew Other
D - Dozers
E - Engines
T - Tractor/Plows
W - Water Tenders
OD - Direct Personnel
OS - Indirect Personnel
VE - Other Vehicles

F - Facilities
EQ - Other Equipment
H1 - Heavy Heli
H2 - Medium Heli
H3 - Light Heli
H4 - Other Heli
CC - Camp Crew
SUP - Supplies
MC - Military Crew
LO - Lowboy Transp
MI - Other Support
FW - Fixed Wing Air
AT - Airtanker
RET - Retardant
BUS - Busses
CAT - Caterer
RES - Rescue Medical
TRA - Mob/Demob
C1 - Handcrew Type 1
C2 - Handcrew Type 2
SHW - Showers

19. From the **Graph Group** drop-down list, select one of the following graph groups to assign to the kind code:

A - Aircraft
C - Crews
E - Equipment
M - Camp Support
O - Personnel
S - Supplies

20. From the **CAT1A** drop-down list, select one of the following codes to assign to the kind. This code is used in Cost Apportionment Summary.

A - Aircraft
E - Crews & Equipment
O - Overhead Support

21. From the **CAT1B** drop-down list, select one of the following codes to assign to the kind. This code is used in the Cost Apportionment Detail.

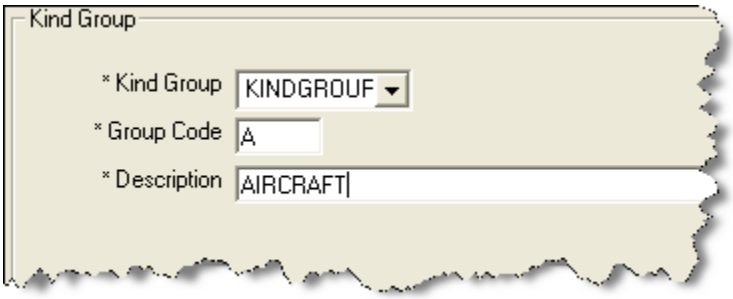
AA - Air: Retardant
AF - Air:Fixed Wing
AH - Air: Helicopter
C - Crews
E - Engine
Q - Other Equipment
S - Support Overhead

22. If **Line Overhead** applies, click to check the **Line Overhead** checkbox. When this checkbox is checked, the Line Overhead filter selection displays for the ICS-204.
23. Click the **Save** button to save the **Kind Code** to the **Lookup Table**.

Kind Group Lookup Table

Follow the steps in this section to add a **Kind Group** to the **Lookup Table**:

1. From the **Modules** drop-down menu, select the **Data Admin** option to open the **Data Admin** window.
2. Click the **Lookup Tables** tab to select it.
3. Under **Feature**, click **Kind Group**. A **Kind Group** area displays at the bottom of the window.

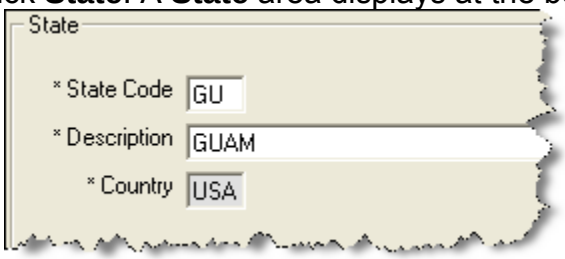


4. Click the **Add** button.
5. From the **Kind Group** drop-down list, select the category to assign to the kind group.
6. In the **Group Code** box, type the code to assign to the kind group.
7. In the **Description** box, type a description of the kind group.
8. Click the **Save** button to save the **Kind Group** to the **Lookup Table**.

State Lookup Table

Follow the steps in this section to add a State to the Lookup Table:

1. From the **Modules** drop-down menu, select the **Data Admin** option to open the **Data Admin** window.
2. Click the **Lookup Tables** tab to select it.
3. Under **Feature**, click **State**. A **State** area displays at the bottom of the window.



4. Click the **Add** button.
5. In the **State Code** field, type the two character code for the state.
6. In the **Description** field, type the name of the state.
7. Click the **Save** button to save the **State** to the Lookup **Table**.

Deleting Non-Standard Lookup Codes

Follow the steps in this section to delete non-standard lookup codes:

Use caution when deleting non-standard lookup codes, because changes to lookup tables will impact all users.

Only **Non-Standard** lookup codes can be deleted. You cannot delete **Standard** lookup codes.

1. From the **Modules** drop-down menu, select the **Data Admin** option to open the **Data Admin** window.
2. Click the **Lookup Tables** tab.
3. Under Feature, click the lookup table that contains the non-standard code you want to delete.
4. In the lookup code grid, click the non-standard code you want to delete.
5. Click the **Delete** button in the **Main** toolbar. A message displays confirming that you want to delete the code:

6. Click the **Yes** button to remove the non-standard lookup code from the application.

Data Admin Revision History

Revision Date	Revision Summary
2010-04-27	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised instructions for the 9.01.00 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Revised for the 7.01.00 version of I-Suite
2007-01-10	Revised instructions based on changes received for Training Manuals.

2006-12-04	Revised instructions by adding more detail and graphics.
2006-04-17	Instructions for new module of the new I-Suite 2006 application.

Resources

The **Resources** section explains how to use the **Resources** module to collect and manage resource information for an incident. 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.

Resources also produces various incident reports, including the 209 Report, Section Report, Qualifications Report, and Daily Incident Reports.

Information entered in **Resources** is shared with other I-Suite modules, including:

- Demob
- Incident Action Plan (IAP
- Time
- Cost
- Supply
- Injury/Illness

Topics in this guide include the following:

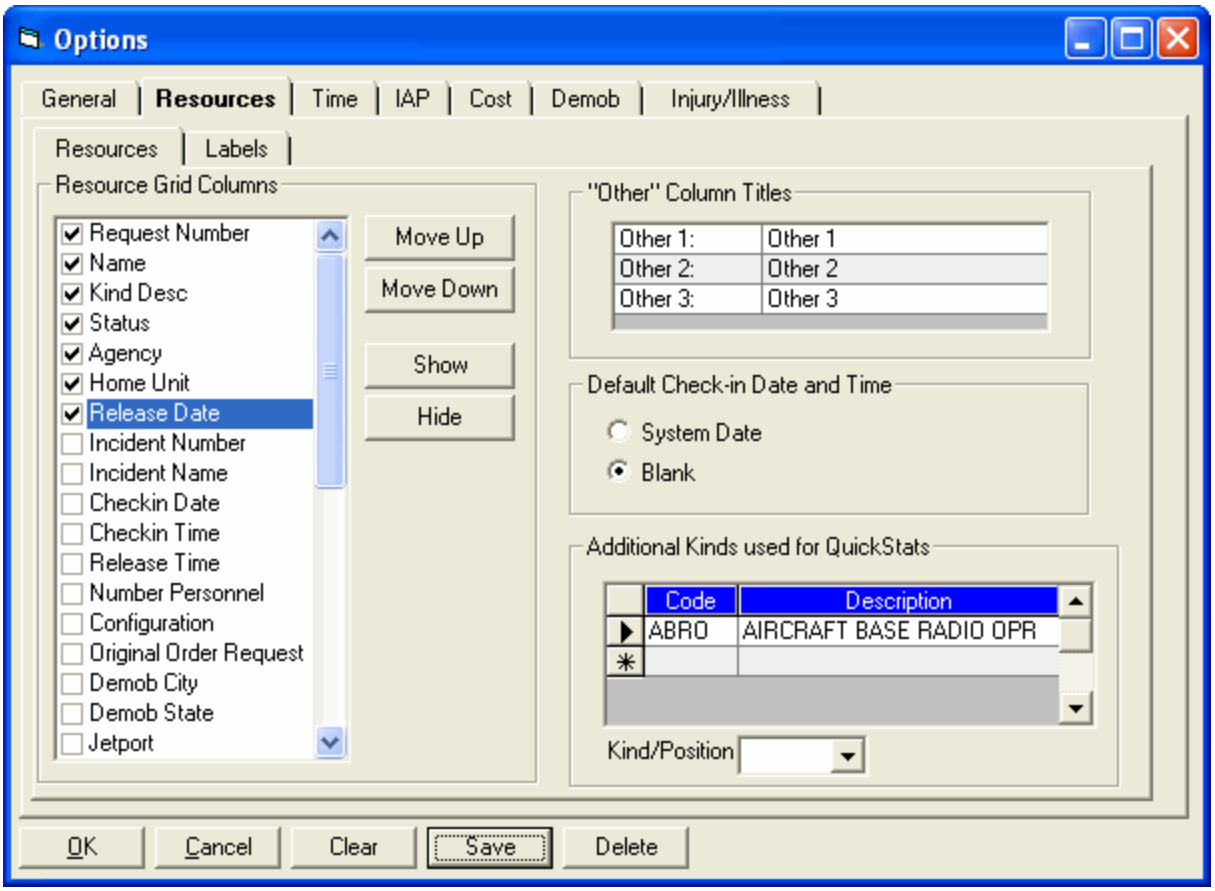
- See "Common Features"
- See "Selecting Resource Options"
- See "Filtering Resource Data"
- See "Common Data"
- See "Managing Data and Resources"
- See "Printing T-Card Labels"
- See "Printing Plans Reports"
- See "Plans Report Descriptions"

Selecting Resource Options

Follow the steps in this section to select the options to use in the **Resources** area of the I-Suite system:

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

3. Click the lower **Resources** tab.



4. Under **Resource Grid Columns**, hold down the **Ctrl** key and click to highlight each of the columns you want to select.
5. If you want to remove the selected columns from the **Resource** grid, click the **Hide** button.

   If you want to display the selected columns in the **Resource** grid, click the **Show** button.

Each column with a checkmark in the checkbox next to it is included in the grid. When you click the **Show** button, it places a checkmark in the checkbox next to the selected column. When you click the **Hide** button, it removes the checkmark from the checkbox. You can also click the checkbox next to a listed column to either **Show** or **Hide** it.

6. To adjust the order in which the columns display in the **Resource** grid, click a column listed under **Resource Grid Columns**. Then click the **Move Up** or **Move Down** button to move the column.

The order in which the columns display under **Resource Grid Columns** is the order in which they will display in the grid.

7. If you want to change the titles that display for the **Other** columns, type the new name in the **"Other" Column Titles** box. For example, to change the name of the **Other 1** column, enter the new name in the box next to **Other 1**.

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

8. If you want to automatically insert the system date and time for the check-in, click the **System Date** option in the **Default Check-In Date and Time** area.

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

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

9. To add additional **Kind Codes for Quick Stats**, select the code from the **Kind/Position** drop-down list. Then click the **Save** button.

   To remove **Kind Codes for Quick Stats**, click the code listed in the **Additional Kinds used for Quick Stats** box. Then click the **Delete** button.

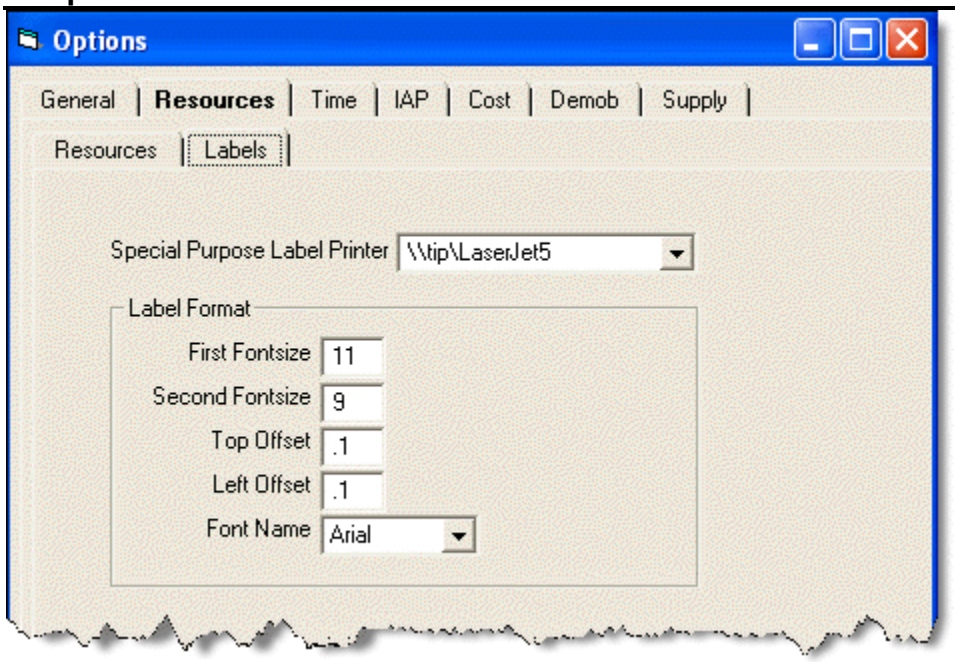
When you add additional **Kind Codes for Quick Stats**, the changes are saved to the database. This means that all users will see the changes.

10. When you have made all of your changes, click the **Save** button to save any changes. Click the **OK** button to close the Options window.

Defining Resource Label Parameters

Follow the steps in this section to define the parameters for **Resource Labels**:

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



4. From the **Special Purpose Label Printer** drop-down list, select the label printer to use.
5. In the **First Fontsize** box, type the font size to use for the first line on the label.
6. In the **Second Fontsize** box, type the font size to use for the second line of the label.
7. In the **Top Offset** box, type 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. Use this option, along with the **Left Offset** option, to define where to print the text on the label.
8. In the **Left Offset** box, type 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. Use this option, along with the **Top Offset** option, to define where to print the text on the label.
9. From the **Font Name** drop-down list, select the type of font to print on the label.
10. Click the **OK** button to save any changes made to the label settings.

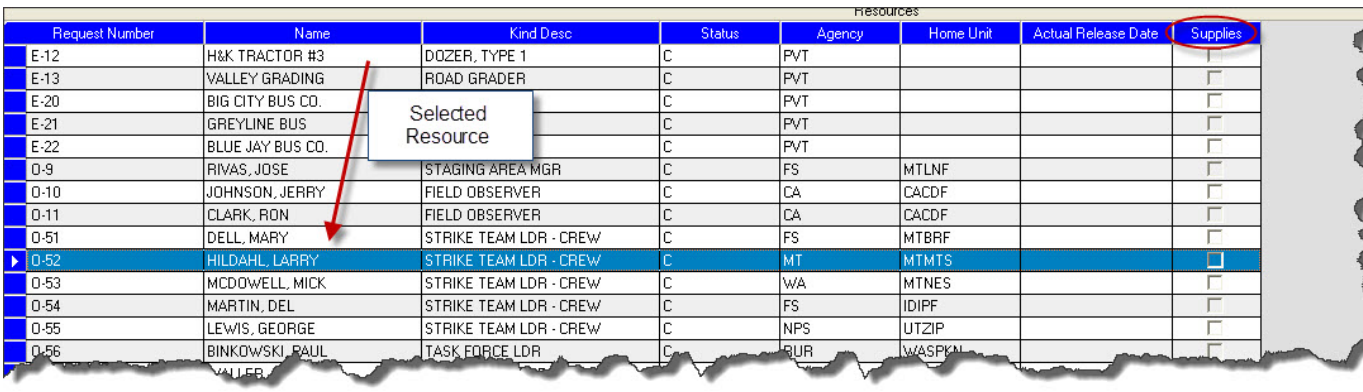
Common Data

This section explains how to review and edit common data in the **Resources** module. Information that displays above the **Plans** tab In the **Manage Resource - Edit Mode** area is considered the **Common Data** for a **Resource**.

Reviewing Common Data

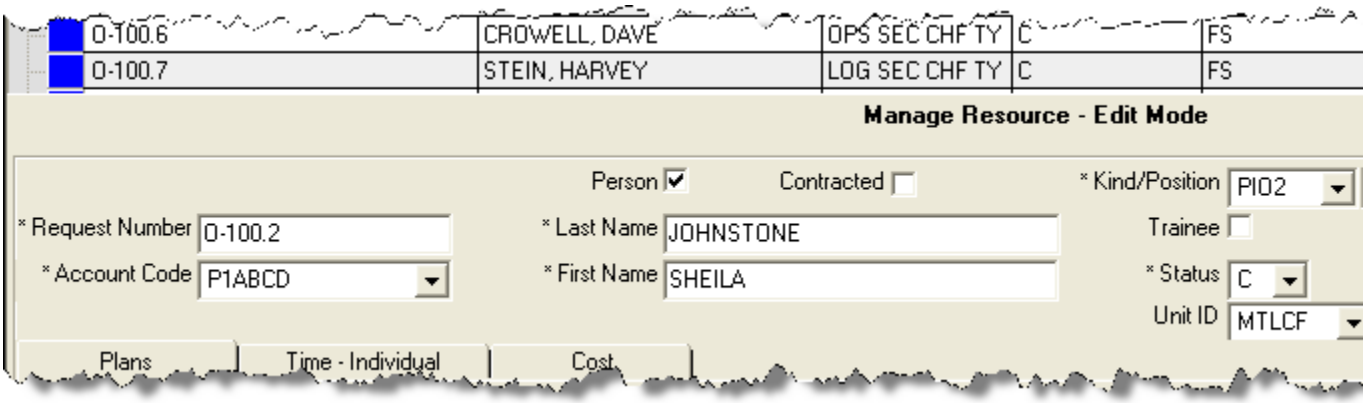
Follow the steps in this section to review common data for a resource:

1. Click the **Resources** button to open the **Resources** window.
2. In the **Resources** grid, click to select the **Resource** you want to review.
   NOTE: The supply column will display a checked box is the resource or subordinate resource has outstanding supply items



Request Number	Name	Kind Desc	Status	Agency	Home Unit	Actual Release Date	Supplies
E-12	H&K TRACTOR #3	DOZER, TYPE 1	C	PVT			
E-13	VALLEY GRADING	ROAD GRADER	C	PVT			
E-20	BIG CITY BUS CO.		C	PVT			
E-21	GREYLINE BUS		C	PVT			
E-22	BLUE JAY BUS CO.		C	PVT			
O-9	RIVAS, JOSE	STAGING AREA MGR	C	FS	MTLNF		
O-10	JOHNSON, JERRY	FIELD OBSERVER	C	CA	CACDF		
O-11	CLARK, RON	FIELD OBSERVER	C	CA	CACDF		
O-51	DELL, MARY	STRIKE TEAM LDR - CREW	C	FS	MTBRF		
O-52	HILDAHL, LARRY	STRIKE TEAM LDR - CREW	C	MT	MTMTS		
O-53	MCDOWELL, MICK	STRIKE TEAM LDR - CREW	C	WA	MTNES		
O-54	MARTIN, DEL	STRIKE TEAM LDR - CREW	C	FS	IDIPF		
O-55	LEWIS, GEORGE	STRIKE TEAM LDR - CREW	C	NPS	UTZIP		
O-56	BINKOWSKI, PAUL	TASK FORCE LDR	C	BUR	WASPKN		

3. Click the **Edit** button in the **Main** toolbar at the top of the window or **double click** the selected Resource to display the **Manage Resource - Edit Mode** area at the bottom of the window:



4. Review the following information for completeness and accuracy:

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.

- *Request Number
- *Account Code
- Person - checked, if applicable
- Contracted - checked, if applicable
- *Resource Name
- *Kind/Position
- Trainee - checked, if applicable

- *Status
- Unit ID
- Agency
- *Configuration
- Actual Release Date
- Actual Release Time

A field label preceded by an asterisk (*) indicates that the information is required.

When the **Person** option is checked, the **Resource Name** text box is replaced with **Last Name** and **First Name** text boxes and an **Other Quals** area displays on the **Plans** tab. Either a **Last Name** OR a **First Name** is required for a person. You do not need to define both in order to save the record.

5. To close the **Manage Resource - Edit Mode** window, click the **Close** button.

Editing Common Data

After reviewing the **Common Data** for a **Resource** on the **Manage Resource - Edit Mode** window, you can edit the information, as needed. Follow the steps in this section to edit the information:

1. Click the **Resources** button to open the **Resources** window.
2. If you want to edit a resource, click the resource in the **Resources** grid, then click the **Edit** button or **double click** the resource.
3. In the **Request Number** box, enter the request number for the resource.
4. From the **Account Code** drop-down list, select the accounting code to assign to the resource.
5. If the resource is a person, click to check the **Person** checkbox.

If you change the **Person** selection and time was posted for the resource, a message displays indicating that the time postings will be deleted if you continue. When you select **Yes**, the system deletes all time postings. When you select **No**, the system does not change the **Person** selection.

If you change the **Person** selection and one or more invoices were already generated for the resource, a message displays indicating that the resource has invoiced postings. You must manually delete those postings before you can change the **Person** selection.

6. If the resource is contracted, click to check the **Contracted** checkbox.

If you change the **Contracted** selection and time was posted for the resource, a message displays indicating that the time postings will be deleted if you continue. When you select **Yes**, the system deletes all time postings. When you select **No**, the system does not change the **Contracted** selection.

If you change the **Contracted** selection and one or more invoices were already

generated for the resource, a message displays indicating that the resource has invoiced postings. You must manually delete those postings before you can change the **Contracted** selection.

7. If the resource is equipment or a crew, enter the **Resource Name**.

   If the resource is a person, enter the person's **Last Name** and **First Name**.

Either a **Last Name** or a **First Name** is required. You do not need to enter both in order to save the record.

8. From the **Kind/Position** drop-down list, select the kind code or position code for the resource.
9. If the resource is a person who is a trainee, click to check the **Trainee** checkbox.
10. From the **Status** drop-down list, select the status of the resource. The following status codes are available:

    C - Checked-In
    D - Demobed
    F - Filled/Not Checked-In
    P - Pending Demob
    R - Reassigned
    S - Staging
11. From the **Unit ID** drop-down list, select the **Unit ID** to assign to the resource.
12. From the **Agency** drop-down list, select the **Agency** for the resource.
13. From the **Configuration** drop-down list, select the configuration for the resource. The following configurations are available:

    S - Single Resource
    S/T - Strike Team
    T/F - Task Force
14. When applicable, enter the **Actual Release Date** for the resource.

When the **D Status** is selected, the **Actual Release Date** is required.

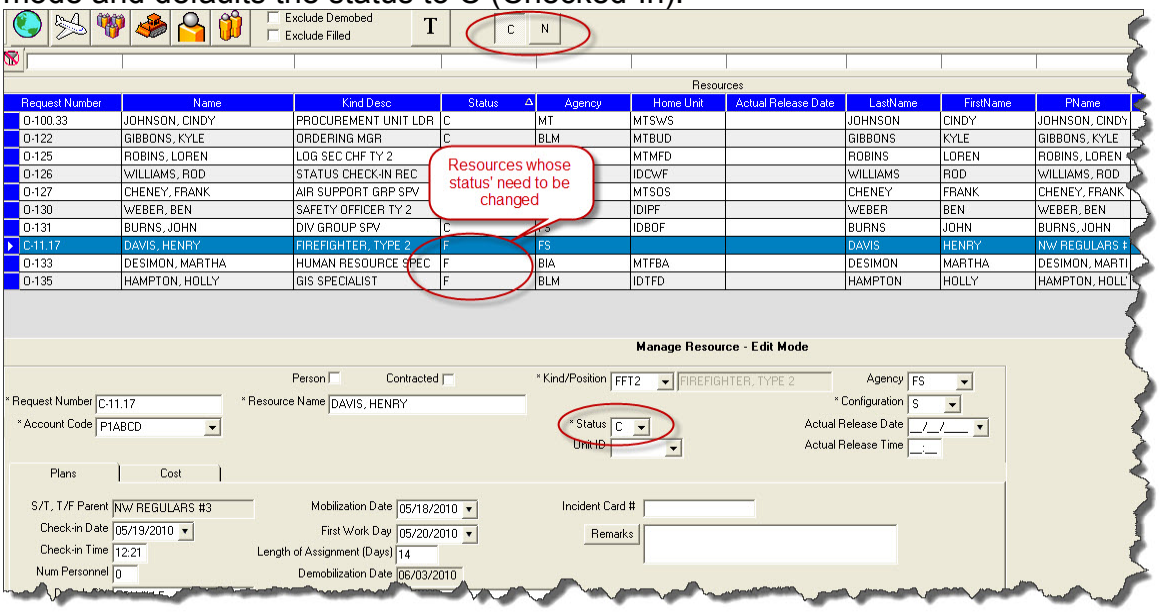
15. When applicable, enter the **Actual Release Time** for the resource.
16. To save any changes to the **Common Data**, click the **Save** button.
17. To close the **Manage Resource - Edit Mode** window, click the **Close** button.

Group Check-In for Multiple Resources

This section explains how to perform Check In for multiple resources utilizing Group Check-In.

1. In the Resource's grid, select the resources for which you want to change the status to **Checked-In**.

2. Click the **C** button on the toolbar. This opens the first selected resource in **Edit** mode and defaults the status to C (Checked-In).



3. Click the **Save and Next** button. Each time you click the **Save and Next** button, the system saves the status change and any other changes made to the resources information. The system then automatically moves to the next selected resource and defaults the status for that resource to **C**.

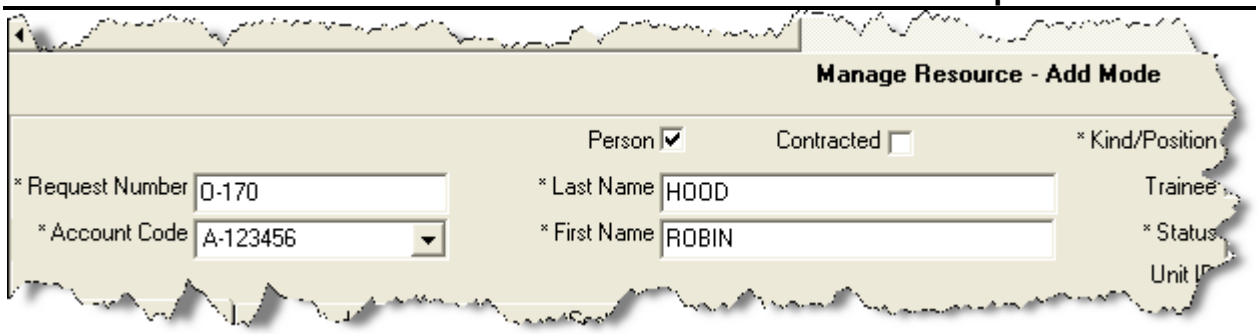
Managing Data and Resources

This section explains how to use the Resources module to add and manage data.

Adding Resources Using ICS 211 or Check-In Form

Follow the steps in this section to add resource items such as Aircraft, Overhead, Crews, and Equipment using an ICS 211 or optional Check-In form:

1. Click the **Resources** button in the toolbar to open the **Resources** window.
2. Click the **Add** button in the **Main** toolbar to add a new resource. A **Manage Resource - Add Mode** area displays at the bottom of the window when you click this button:



3. In the **Manage Resource – Add Mode** area, enter or select the following information, as appropriate. See "Editing Common Data"

- *Request Number
- *Account Code
- Person - checked, if applicable
- Contracted - checked, if applicable
- *Resource Name
- *Kind/Position
- Trainee - checked, if applicable
- *Status

When the **D** status is selected, the **Actual Release Date** is required.

- Unit ID (Optional)
- Agency (Optional)
- *Configuration
- Actual Release Date (Optional)
- Actual Release Time (Optional)

A label preceded by an asterisk (*) indicates that the information is required.

When the **Person** option is checked, the **Resource Name** box is replaced with **Last Name** and **First Name** text boxes and an **Other Quals** box displays. Either a **Last Name** OR a **First Name** is required for a person. You do not need to define both in order to save the record.

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.

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

The **Plans** tab only displays at the bottom of the Resources window if the user has Resource rights.

- Check-In Date
- Check-In Time

- Num Personnel
- Demob City
- Demob State
- Jetport
- Travel Method
- Travel Questions

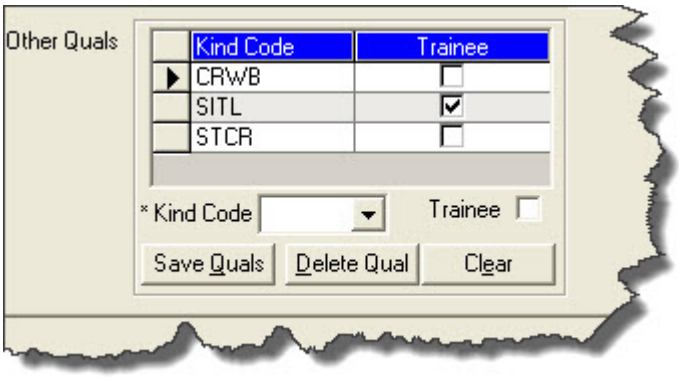
To answer Travel Questions, click the **Travel Questions** button that displays beneath the **Travel Method** box. If the answer to a question is **Yes**, click to check the checkbox next to the question. Click the **Save** button to save the responses to the Travel Questions.

- Mobilization Date
- First Work Day
- Length of Assignment (Days)
- Other (1, 2, & 3)
- Vehicle ID
- Original Order/Request Number
- Incident Card #

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).

- Plans Remarks

5. To enter **Other Quals** for a person, move to the **Other Quals** area on the **Plans** tab:



a. Select a kind code from the **Kind Code** drop-down list.
b. If the person is a trainee for the selected **kind code**, click the **Trainee** option.
c. To save the **Other Quals** you defined, click the **Save Quals** button.
d. To delete the **Other Quals** you defined, click the **Delete Qual** button.
6. Click the **Save** button to save the resource.
7. When the **Data Saved** window displays, click the **OK** button to close the window.

Rostering a Resource

To roster a resource, complete the following steps:

Resources cannot be rostered to a person.

1. Click the **Roster** button at the bottom of the window.

2. In 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
- *Kind/Position
- Trainee checkbox (Optional)
- *Status

When the **D** status is selected, the **Actual Release Date** is required.

- Unit ID (Optional)
- Agency (Optional)
- Actual Release Date (Optional)
- Actual Release Time (Optional)
- *Time information

3. On the **Plans** tab, complete the following information, as needed:

- Check-in Date
- Check-in Time
- Demob City
- Demob State
- Jetport
- Travel Method
- Mobilization Date
- First Work Day
- Length of Assignment (Days)
- Demobilization Date
- Other 1
- Other 2
- Other 3
- Vehicle ID

- Original Order/Request Number
- Incident Card #

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).

- Plans Remarks
- Other Quals

4. On the **Time** tab, enter the appropriate information for the person being rostered to the resource.

The **Time** tab only displays if the user has **Time** rights See "Defining Personnel Information".

Click the **Members to Fed** button to automatically assign an **Employment Code** of **Fed** to any rostered person who does not have an **Employment Code** assigned.

You can change the **Members to Fed** button to the **Members to Other** button by clicking the arrow next to the button and selecting **Other** from the list that displays. When you click the **Members to Other** button, an E**mployment Code** of **Other** is assigned to any rostered person who does not have an **Employment Code** assigned.

5. On the **Cost** tab, enter the appropriate information for the person being rostered to the resource.

The **Cost** tab only displays if the user has **Cost** rights. See "Cost Resources"

6. After the appropriate information is defined, click the **Save** button to save the **Roster** information.

Creating a Strike Team/Task Force Parent Record

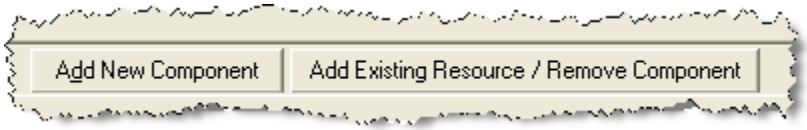
There are two methods you can use to create a strike team/task force.

- Use the first method when a group of resources not currently defined in the database is ordered as a strike team/task forceSee "Method 1 - Attach Strike Team/Task Force to Parent Record".
- Use the second method when assembling a strike team/task force from resources that already exist in the I-Suite databaseSee "Method 2 - Attach Existing Resources to Strike Team/Task Force".

Both methods require you to create a parent record or place holder. You will then need to add or attach the strike team/task force components to the parent record. Follow the

steps in this section to create the parent record for the strike team or task force:

1. Click the **Resources** button in the toolbar to open the **Resources** window.
2. Click the **Add** button to add a new record.
3. On the **Manage Resource – Add Mode** window, enter the appropriate information, including ALL required information. See "Editing Common Data"
   - 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).
   - When selecting the **Configuration**, select **S/T**. Notice that the label **Manage Resources – Add Mode** has now changed to **Add Strike Team / Task Force**. The **Roster** button is replaced with two new buttons for adding components.



   - If tabs display at the bottom of the window (Plans, Time, Cost), complete the information, as appropriate.
4. To complete the Strike Team/Task Force parent record, continue with See "Method 1 - Attach Strike Team/Task Force to Parent Record" or See "Method 2 - Attach Existing Resources to Strike Team/Task Force".

Method 1 - Attach Strike Team/Task Force to Parent Record

Use Method 1 to add strike team or task force components that do not already exist in the I-Suite database.

If you add the strike team leader last, you will not have to change the kindcode.

1. On the **Resources** window, click the **Add New Component** button.

The **Add New Component** button only displays when **S/T** or **T/F** is selected in the **Configuration** field.

2. When the message displays indicating that you must save the resource to add the component, click **Yes** to save the parent record.
3. When the **Data Saved** message displays, click the **OK** button to display the **Add New Strike Team/Task Force** window.
4. On the **Add New Strike Team/Task Force Component** window, complete the common information, as needed. See "Editing Common Data"

Configuration will default to **C** for component.

In the **Num Personnel** box, type the total number of people on the strike team component.

5. If the **Plans** tab displays at the bottom of the window, complete the information, as needed.
6. **Roster** crew members, as needed.
7. To save the **Strike Team/Task Force Component** after entering the appropriate information, click the **Save** button.
8. On the **Data Saved** message box, click the **OK** button.
9. Continue adding components, as needed.
10. After adding the final component, click the **Close** button.

Several boxes are completed by I-Suite based on the parent record. Review this information for accuracy. Also, make sure to change the kind code when rostering people, if needed.

Method 2 - Attach Existing Resources to Strike Team/Task Force

Use Method 2 to add strike team or task force components that already exist in the I-Suite database. Follow the steps in this section to use Method 2 to add strike team or task force components to a parent record:

1. On the **Resources** window, click the **Add Existing Resource/Remove Component** button.
2. When the message displays indicating that you must save the resource to add the component, click **Yes** to save the parent record.
3. When the **Data Saved** window displays, click the **OK** button to display the **Add Existing Strike Team/Task Force Components** window.
4. On the **Add Existing Strike Team/Task Force Component** window, click a resource listed in the grid. Then click the **Add** button to add the resource to the Strike Team/Task Force.
5. Repeat step 4 for each resource you want to add to the Strike team/Task Force.

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.

6. After adding all of the appropriate components to the strike team/task force, click the **Close** button.

Filtering Resource Data

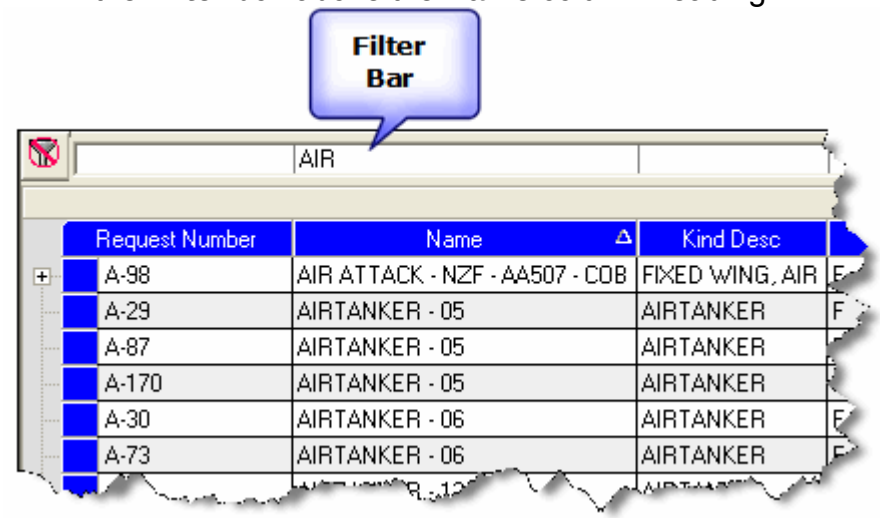
This section explains how to filter **Resources** data. You can search for specific characters in any column.

Filtering Data Using the Filter Bar

Follow the steps in this section to use the **Filter Bar** to filter data in the **Resources** grid:

1. Click the **Resources** button to open the **Resources** window.
2. In the **Filter Bar** above the grid, enter a term to search for that specific item in the grid. The filter boxes are located directly above the **Resources** grid and correspond to the columns over which they display.

   For example, you can search for any name that begins with the words air by typing **AIR** in the **Filter** box above the **Name** column heading.



2. Type the first several characters of the search term in the **Filter** box to narrow your search.
3. To remove the filter, either delete the characters that you typed or click the **Clear Filter Bar** button that displays to the left of the **Filter bar**.

Filtering with the Exclude Demobed Option

To remove resources with a **Demobed** status from the Resources grid, click to check the **Exclude Demobed** checkbox.

Filtering with the Exclude Filled Option

To remove resources with a **Filled** status from the Resources grid, click to check the **Exclude Filled** checkbox.

Using Filter Buttons

1. Open the **Resources** window.
2. Click one of the following buttons to only display those types of records:

- All Resources

- Aircraft
- Crews
- Equipment
- Overhead
- All Personnel

When the **All Personnel** filter is selected in Resources, you cannot **Add** or **Edit** resources. The **Add** and **Edit** buttons in the **Main** toolbar are disabled.

Sorting with Table Column Headings

1. Open the **Resources** window,
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.

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.

Editing Data and Resources

This section explains how to edit **Resources Data**.

Editing Resources

Follow the steps in this section to edit resources:

1. Click the **Resources** button to open the **Resources** window.
2. Click the resource you want to edit in the **Resources** grid.

If your team is currently part of the **Supply Pilot**, you can scan an **Incident Card** from the **Resources** grid to identify the resource associated with that card. If the Incident Card is not yet associated with a resource, a message displays indicating that the Incident Card is not currently assigned to a resource.

3. On the **Toolbar**, click the **Edit** button.
4. On the **Manage Resource – Edit Mode** window, edit the appropriate information See "Editing Common Data", and then click the **Save** button.

Refreshing Data

Click the **Refresh Data** button to display the most current data on the window.

Deleting a Resource

Follow these steps to delete a resource:

1. Open the **Resources** window.
2. Click the resource you want to delete in the **Resources** grid.
3. Click the **Delete** button in the **Main** toolbar.
4. Review the warning messages that display.
5. After verifying that you can delete the resource, click the **Yes** button to delete the resource.

Printing T-Card Labels

Follow the steps in this section to print **T-Card** labels.

1. Click the **Resources** button to open the **Resources** window.
2. In the **Resources** grid, click the resource for which you are creating the T-Card.
3. Click the **T-Card** button in the toolbar. The **T-Card Label** is sent to your default printer.

Printing Plans Reports

Follow the steps in this section to print **Plans Reports** for resources:

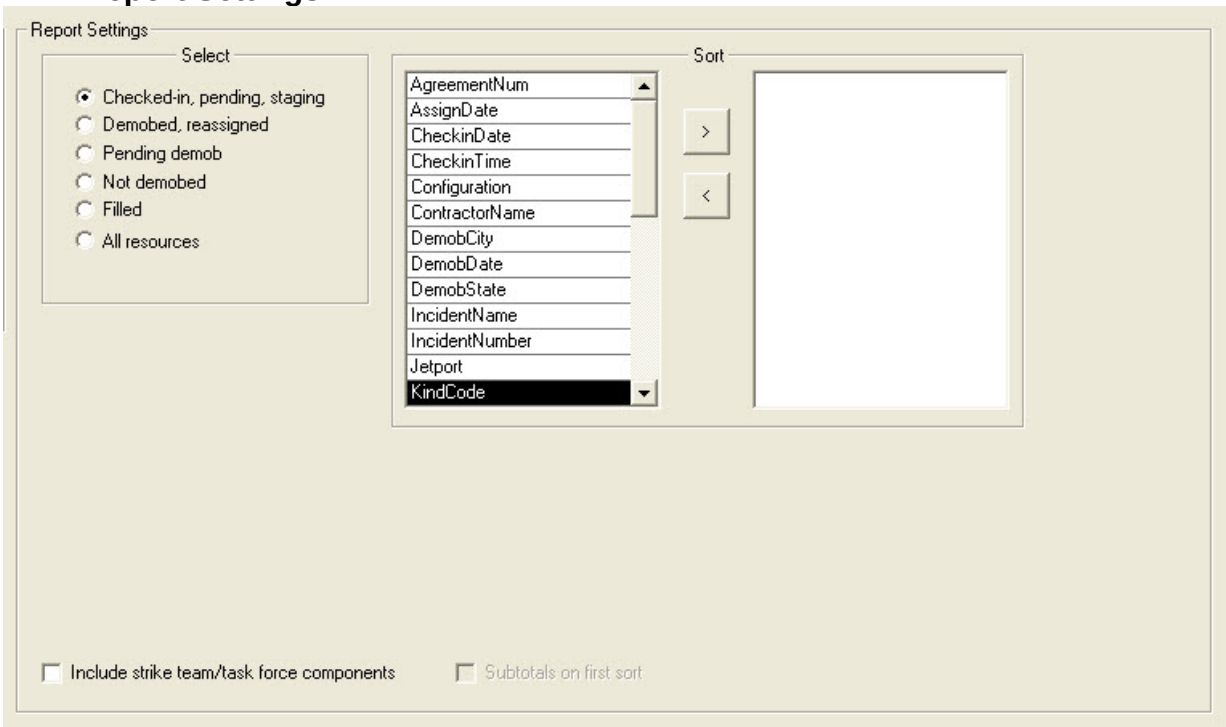
1. Click the **Reports** button in the toolbar at the top of the window. The **Plans Report** window displays.
2. Click one of the following options to identify the type of information you want to include on the report:

- Aircraft Report See "Aircraft Report"
- Crew Report See "Crew Report"
- Equipment Report See "Equipment Report"
- Overhead Report See "Overhead Report"
- 209 Resource List See "209 Resource List"
- Qualifications Report See "Qualifications Report"
- Section Report See "Section Report"
- Strike Team/Task Force Report See "Strike Team/Task Force Report"
- Crew Roster Report crewrstrreportSee Crew Roster Report

Aircraft Report

This report identifies the aircraft available for the incident. To generate an Aircraft Report, complete the following steps:

1. On the **Plans Report** window, click the **Aircraft Report** option to display the **Report Settings**.

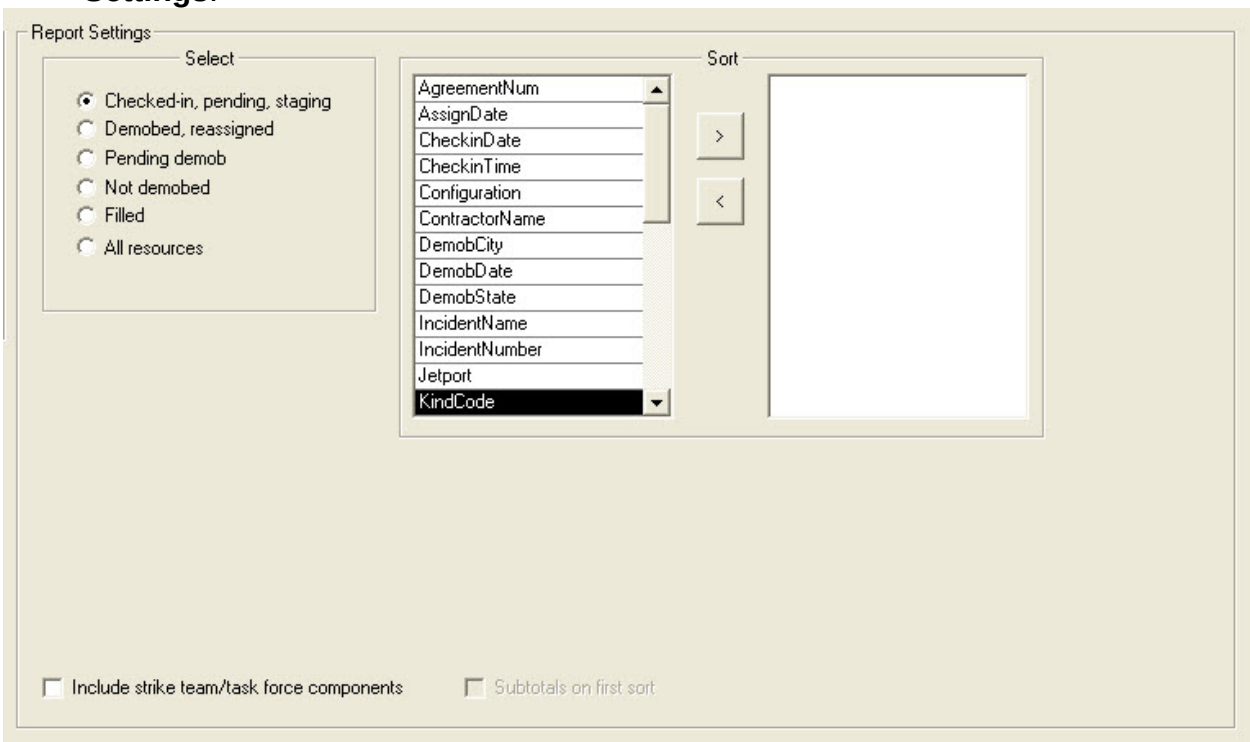


2. Under **Select**, click one of the following options to only include resources that meet that criteria:
   - Check-in, pending, staging
   - Demobed, reassigned
   - Pending demob
   - Not demobed
   - Filled
   - All resources
3. Under **Sort**, double click to select the sorts to use when creating the report. Select the sort options in the order in which you want the information sorted.
4. 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.
5. If you want to include sub-totals for the first sort that you selected, click to check the **Subtotals on first sort** checkbox.
6. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.
7. To print the report without previewing, click the **Print** button.

Crew Report

This report identifies the crews available for the incident. To generate a Crew Report, complete the following steps:

1. On the **Plans Report** window, click the **Crew Report** option display the **Report Settings**.



2. Under **Select**, click one of the following options to only include resources that meet that criteria:

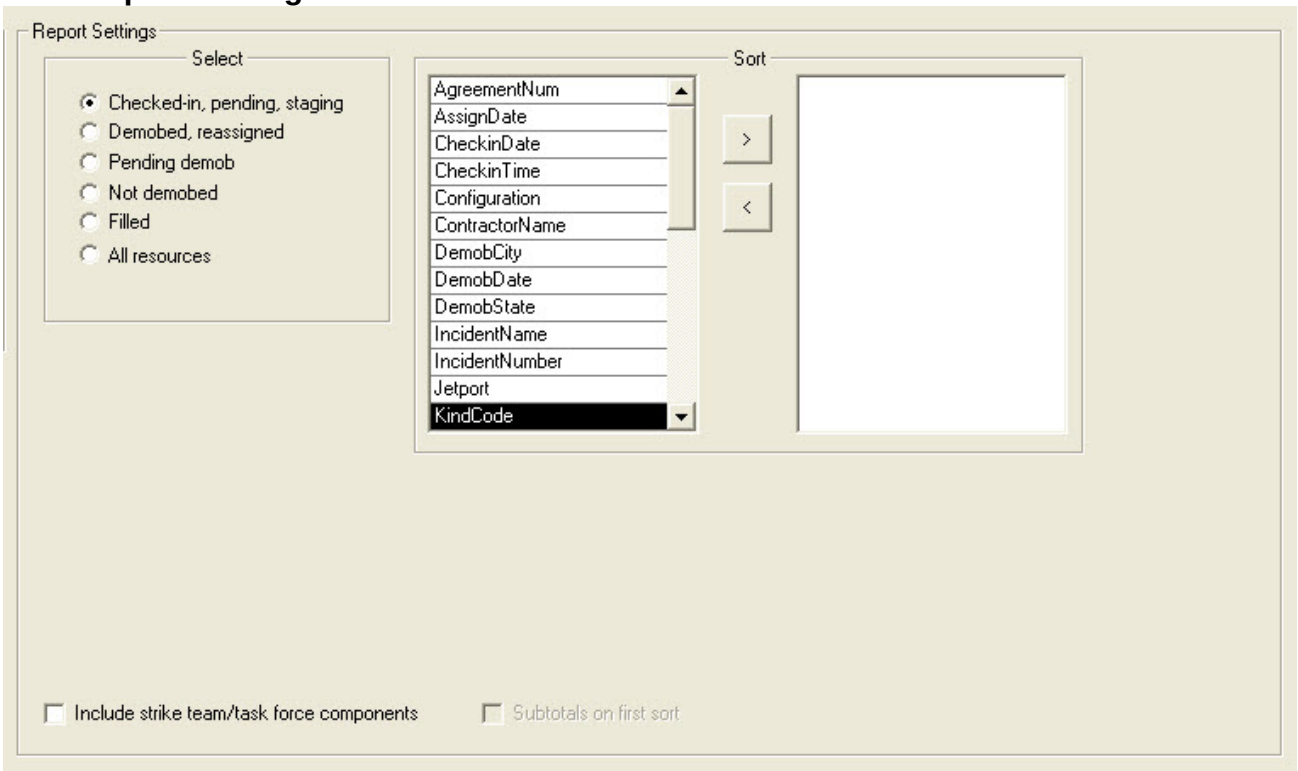
- Check-in, pending, staging
- Demobed, reassigned
- Pending demob
- Not demobed
- Filled
- All resources

3. Under **Sort**, double 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.
4. 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.
5. If you want to include sub-totals for the first sort that you selected, click to check the **Subtotals on first sort** checkbox.
6. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.
7. To print the report without previewing, click the **Print** button.

Equipment Report

This report identifies the equipment available for the incident. To generate the Equipment Report, complete the following steps:

1. On the **Plans Reports** window, click the **Equipment Report** option to display the **Report Settings**.



2. Under **Select**, click one of the following options to only include resources that meet that criteria:

- Check-in, pending, staging
- Demobed, reassigned
- Pending demob
- Not demobed
- Filled
- All resources

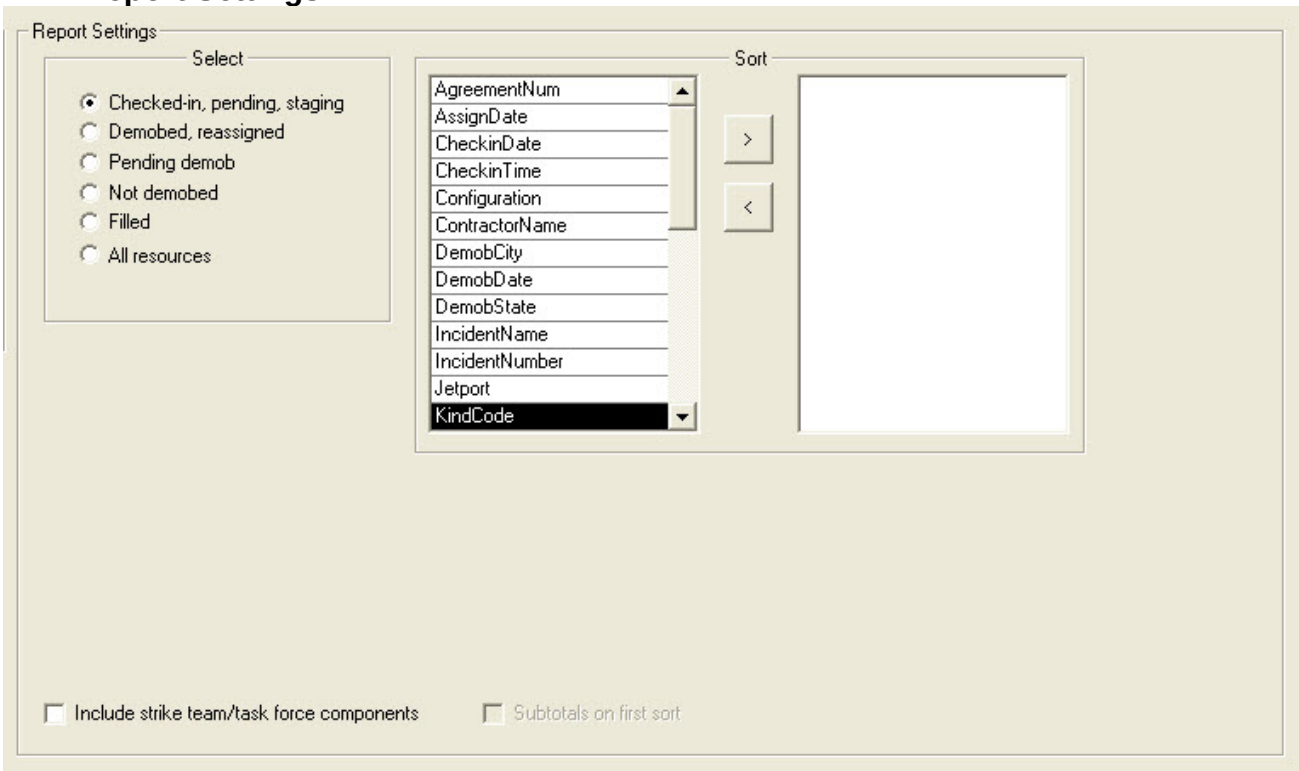
3. Under **Sort**, double click to select the sorts to use when creating the report. Click the sort options in the order in which you want the information sorted.
4. If you want to include the Strike Team/Task Force Components in the report, click to check the **Include strike team/task force components** checkbox.
5. If you want to include sub-totals for the first sort that you selected, click to check the **Subtotals on first sort** checkbox.
6. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.

7. To print the report without previewing, click the **Print** button.

Overhead Report

This report identifies the overhead personnel available for the incident. To generate an Overhead Report, complete the following steps:

1. On the **Plans Report** window, click the **Overhead Report** option display the **Report Settings**.



2. Under **Select**, double click one of the following options to only include resources that meet that criteria:

- Check-in, pending, staging
- Demobed, reassigned
- Pending demob
- Not demobed
- Filled
- All resources

3. Under **Sort**, double 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.
4. 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.
5. If you want to include sub-totals for the first sort that you selected, click to check the **Subtotals on first sort** checkbox.

6. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.
7. To print the report without previewing, click the **Print** button.

209 Resource List

This report contains ICS-209 information for Block 29 of the FAMWEB ICS 209 generated by the Situation Unit Leader.

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

When the **Manage All Incidents as One** option is selected, the 209 Resource List will include data for all incidents in the database.

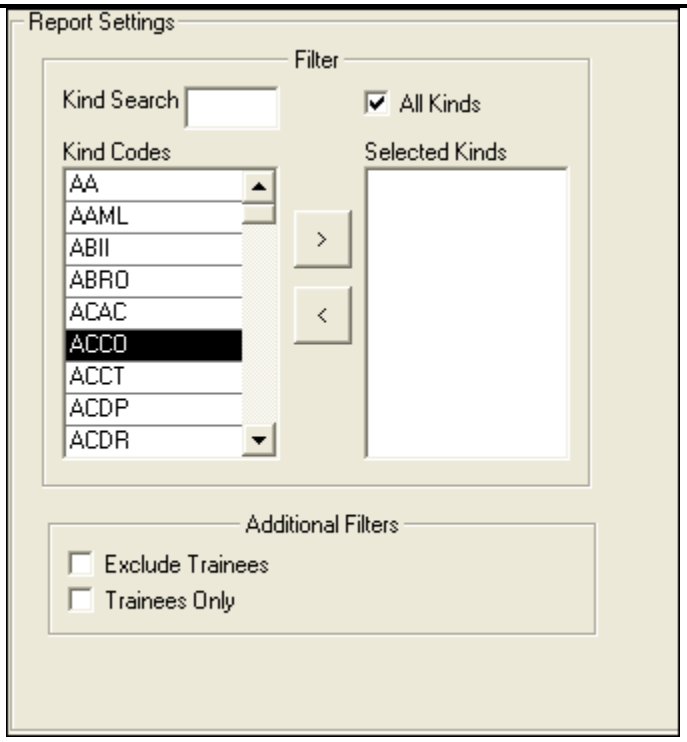
To generate the 209 Resource List, complete the following steps:

1. On the **Plans Report** window, click **209 Resource List**.
2. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.
3. To print the report without previewing, click the **Print** button.

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 the Qualifications Report, complete the following steps:

1. On the **Plans Report** window, click **Qualifications Report** to display the **Report Settings**.



2. To include **All Kinds** in the report, click to check the **All Kinds** checkbox.

   To include specific kind codes in the report, double click the code you want to include to move it from the **Kind Codes** list to the **Selected Kinds** list.

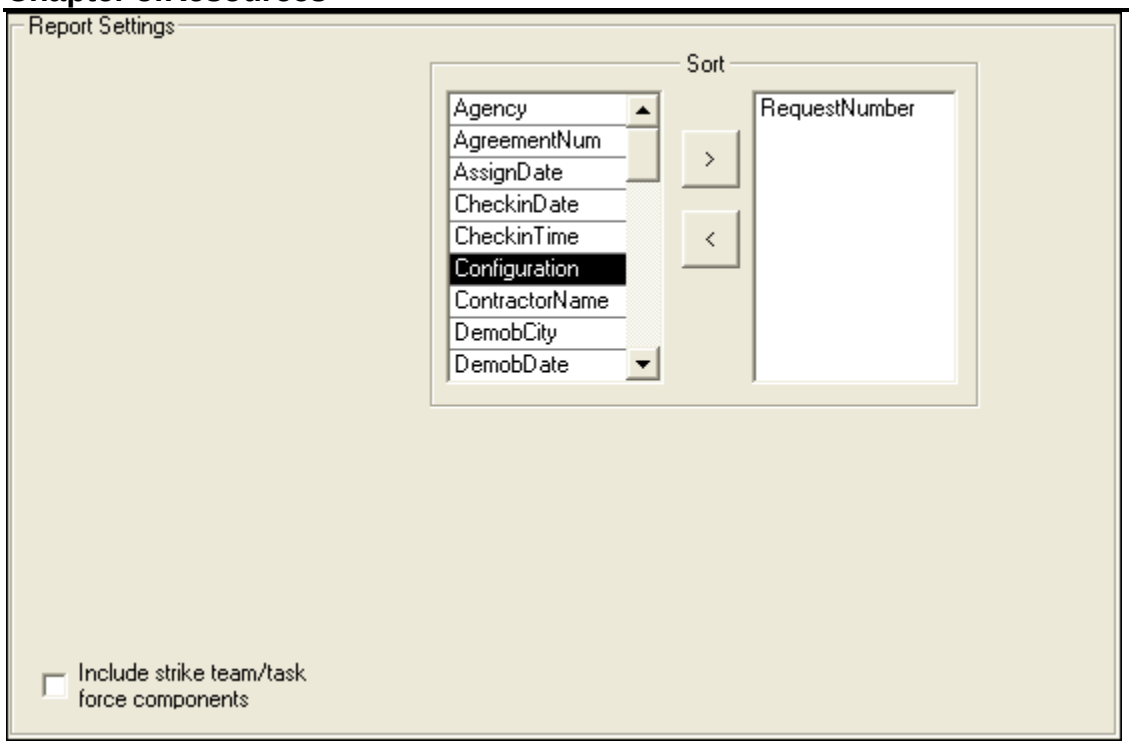
To search for a code listed under **Kind Codes**, enter the code in the **Kind Search** box. The application automatically highlights the code that matches your search term. Double click the kind code or click the **>** button to add it to the **Selected Kinds** list.

3. If you do not want to include trainees in the report, click to check the **Exclude Trainees** checkbox.
4. If you only want to include trainees in the report, click to check the **Trainees Only** checkbox.
5. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.
6. To print the report without previewing, click the **Print** button.

Section Report

This report identifies those resources assigned to different sections (e.g. Command Staff, Operations Section, etc.). To generate a Sections Report, complete the following steps:

1. On the **Plans Report** window, click **Section Report** display the **Report Settings**.

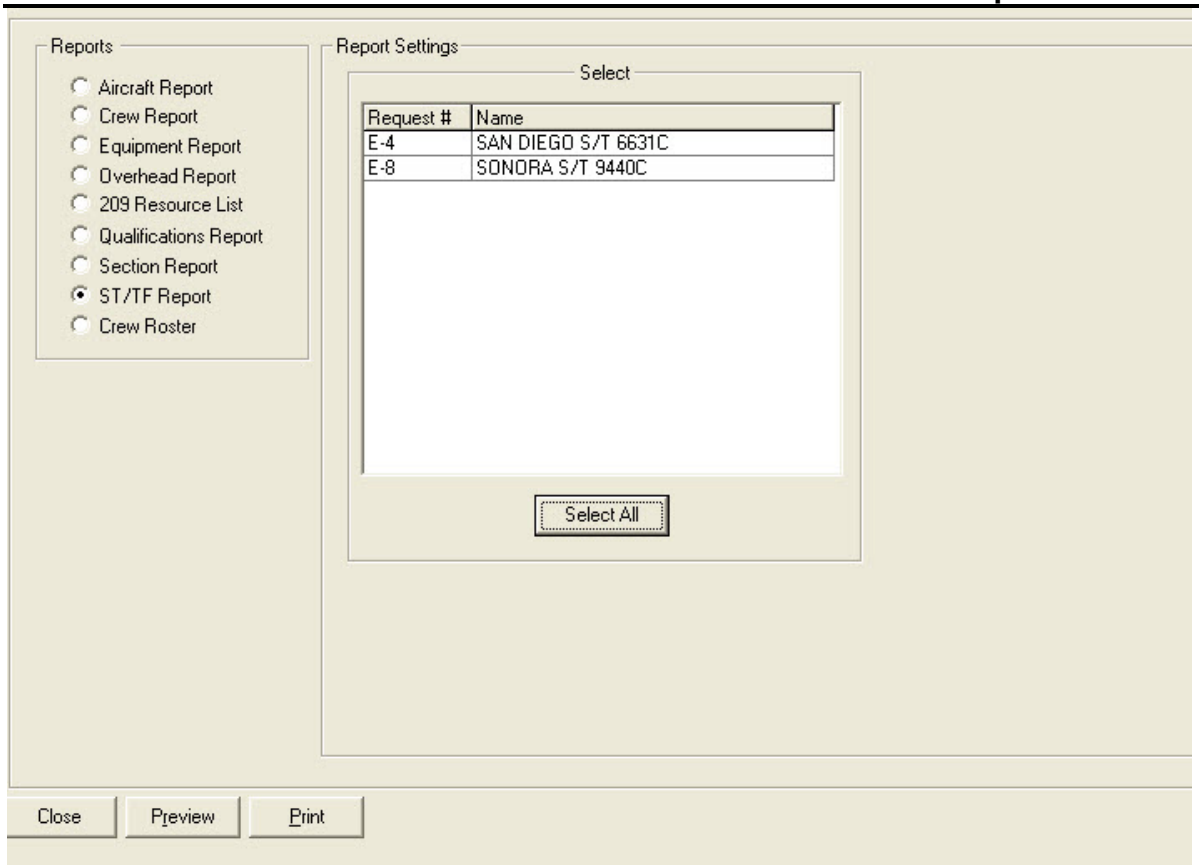


2. Under **Sort**, double click to select the sorts to use when creating the report. Click the sort options in the order in which you want the information sorted.
3. If you want to include the Strike Team/Task Force Components in the report, click to check the **Include strike team/task force components** checkbox.
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.

Strike Team/Task Force Report

This report identifies the Strike Teams and Task Forces currently defined in the I-Suite System. To generate a Strike Team/Task Force Report, complete the following steps:

1. On the **Plans Report** window, click **ST/TF Report** to display the **Report Settings**.

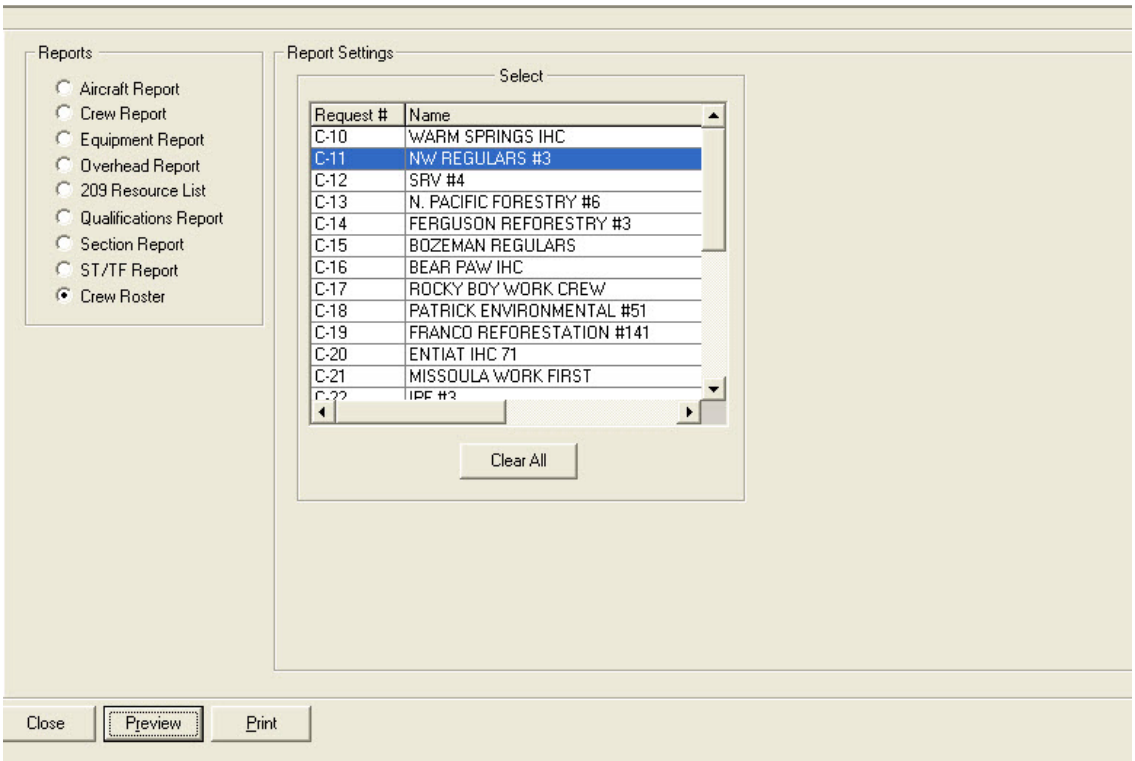


2. Under **Select**, click the strike teams and task forces to include in the report. To include more than one strike team or task force, hold down the **Ctrl** key and click each one you want to include. To include all strike teams or task forces, click the **Select All** button.
3. To preview and then print the report, click the **Preview** button. Then click the **Print** button.
4. To print the report without previewing, click the **Print** button.

Crew Roster Report

This report identifies all crews currently defined in the I-Suite system. To generate a Crew Roster Report, complete the following steps:

1. On the **Plans Report** window, click **Crew Roster** to display the **Report Settings**.



2. Under **Select**, click the crew(s) to include in the report. To include more than one crew, hold down the **Ctrl** key and click each one that you want to include. To include all crews, click the **Select All** button.
3. To preview and then print the report, click the **Preview** button. Then click the **Print** button.
4. To print the report without previewing, click the **Print** button.

Resources Revision History

Revision Date	Revision Summary
2011-03-02	Revised instructions for the 11.01.00 version of I-Suite.
2010-04-27	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised Instructions for the 9.01.00 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Revised instructions for the 7.01.00 version of I-Suite.
2007-01-10	Revised instructions based on changes received for Training Manuals.
2006-12-04	Revised instructions by adding more detail and graphics.
2006-06-12	Added instructions for printing T-Card labels and revised

	instructions for the 6.02 version of I-Suite.
2006-04-17	Revised instructions for the new I-Suite 2006 application.
2005-02-28	Revised instructions for the new I-Suite website and to reflect changes in procedures from the June and August 2004 I-Suite releases.

Demob

The **Demob** section explains how to use the **Demob** module to assist users in preplanning and demobilizing resources. Information entered in **Demob** is shared with other I-Suite modules, including:

- Resources
- Incident Action Plan (IAP)
- Time
- Cost
- Supply

Demob Window

The Demob window is organized in the following manner:

- The **Resources Grid** displays beneath the toolbars at the top of the window. This grid contains a list of the resources currently in the I-Suite database. Click a resource in the grid to either view or edit that resource's demobilization information.
- **Demobilization** information for a resource is defined on the left side of the window. If you select a **Person** resource in the **Resources Grid**, an **Other Quals** area displays at the bottom of the window in this area.
- **Tentative Release** information for a resource displays in the middle section of the window. This is the area where all tentative information is entered.

If you select a **Return Travel Method** of **A/R** or **AIR** in either the Demobilization or Tentative Release areas, additional information about air travel displays at the bottom of the window.

- **Actual Release** information is defined on the right side of the window. This is the area where all actual information is entered.
- The **Close** button closes the **Demob** window.
- The **Previous** button moves to the previous record in the Resources grid.
- The **Next** button moves to the next record in the Resources grid.
- The **Save** button saves any changes made to the Demob information

Demob Topics

Topics in this section include the following:

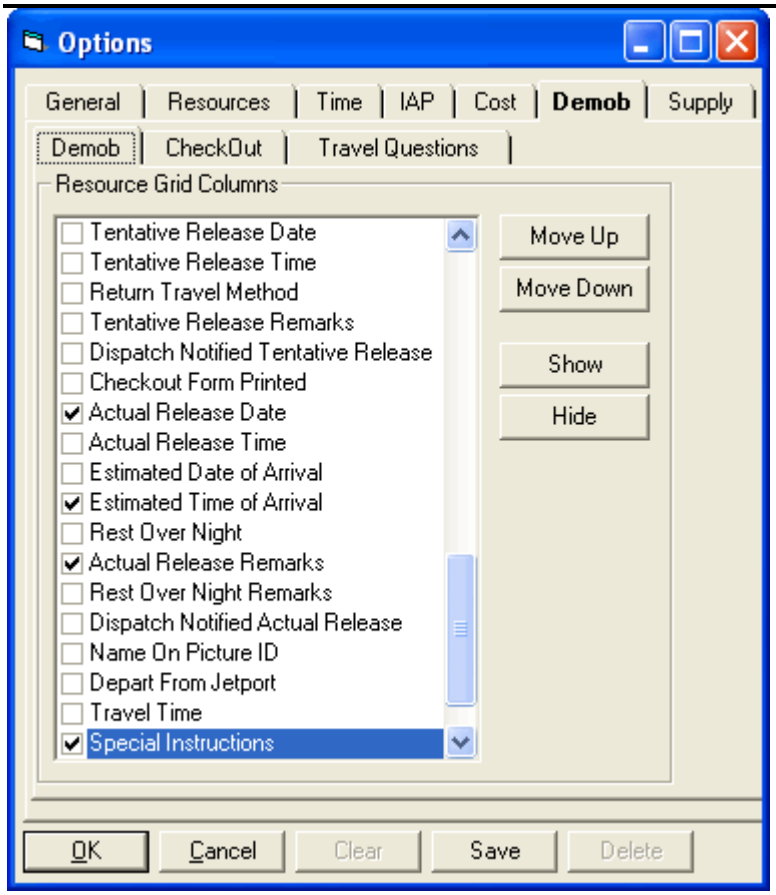
- See "Common Features"
- See "Selecting Demob Options"
- See "Reviewing Common Data"
- See "Define Demob Information"
- Demob Multiple Resources
- See "Tentative Release Poster"
- See "Available for Release Report"
- See "Air Travel Request Report"
- See "Last Work Day Report"
- See "Demobilization Checkout Form"
- See "Ground Support Report"
- See "Actual Demob Report"
- See "Other Demob Reports"
- See "Demob Reports for Selected Resources "

Selecting Demob Options

Follow the steps in this section to select the options to use in the **Demob** area of the I-Suite system:

Also refer to See "Selecting Demob Checkout Options" and See "Selecting Travel Questions for Demob".

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



4. Under **Resource Grid Columns,** hold down the **Ctrl** key and click to highlight each of the columns you want to select. The following columns are available:
5. If you want to remove the selected columns from the **Demob** window, click the **Hide** button.

   If you want to display the selected columns on the **Demob** window, click the **Show** button.

Each column with a checkmark in the checkbox next to it is included in the grid. When you click the **Show** button, it places a checkmark in the checkbox. When you click the **Hide** button, it removes the checkmark from the checkbox. You can also click the checkbox next to a column to either **Show** or **Hide** it.

6. 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.

The order in which the columns display under **Resource Grid Columns** is the order in which they will display in the grid.

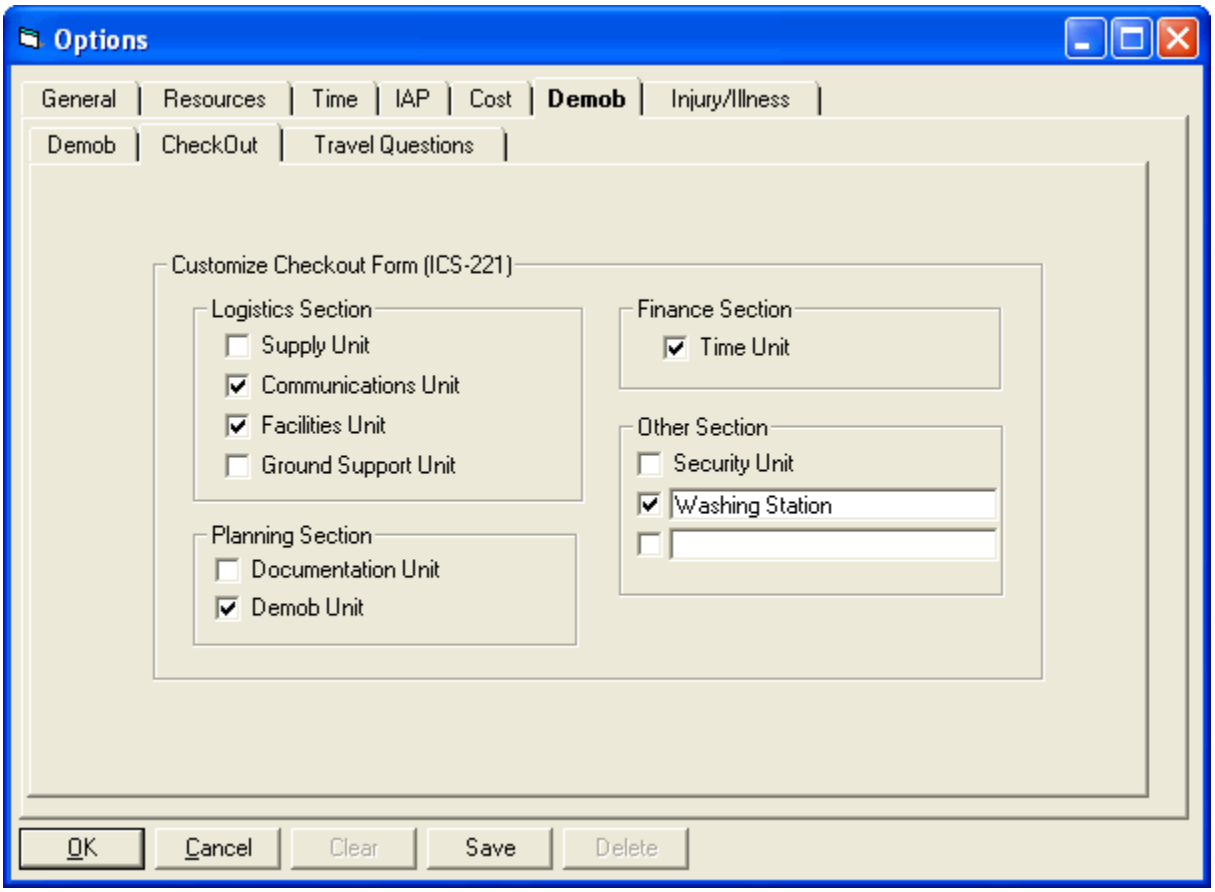
7. When you have made all of your changes, click the **Save** button to save the changes. Click the **OK** button to close the Options window.

Selecting Demob Checkout Options

Follow the steps in this section to select the checkout options to use in **Demob**:

Also refer to See "Selecting Demob Options" and See "Selecting Travel Questions for Demob".

1. From the **Tools** drop-down, select **Options**. The **Options** window displays.
2. Click the **Demob** tab to select it.
3. Click the **Check-Out** tab to select it.



4. Under the **Logistics Section**, click to check each of the options you want to check in the **Logistics** section of form **ICS-221**. You can include:

- Supply Unit
- Communications Unit
- Facilities Unit
- Ground Support Unit

5. If you want to check the **Documentation Unit** in the **Planning Section** of the **ICS-221** form, click to check the **Documentation Unit** checkbox.

6. If you want to check the **Demob Unit** in the **Planning Section** of the **ICS-221** form, click to check the **Demob Unit** checkbox.
7. If you want to check the **Time Unit** in the **Finance Section** of the **ICS-221** form, click to check the **Time Unit** checkbox.
8. If you want to checkthe **Security Unit** in the **Other Section** of the **ICS-221** form, click to check the **Security Unit** checkbox.
9. 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.

An example of other additional information is **Washing Station**.

9. When you have made all of your changes, click the **Save** button to save the changes. Then click the **OK** button to close the **Options** window.

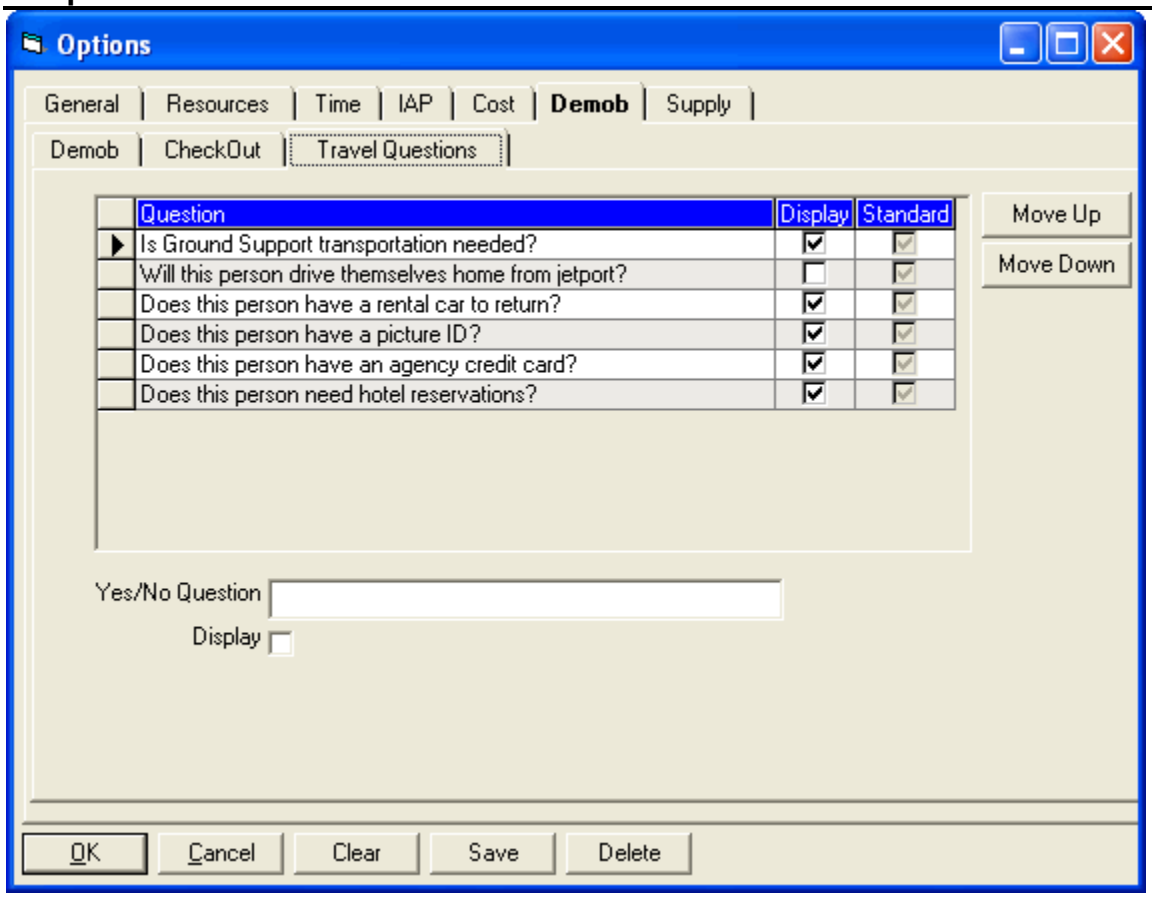
Selecting Travel Questions for Demob

Follow the steps in this section to define the **Air Travel Questions** to use in the **Demob** area of the I-Suite system:

Also refer to See "Selecting Demob Options" and See "Selecting Demob Checkout Options".

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**.

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
2. Click the **Demob** tab to select it.
3. Click the **Travel Questions** tab to select it.



4. To display a listed question in the **Air Travel** grid for **Demob**, click to check the **Display** checkbox next to the question.
5. 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.
6. Click the **Save** button to save your changes.

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.

Add New Travel Question

Follow the steps in this section to add new travel questions for the Air Travel Request:

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

1. Click the **Add** button.
2. In the **Question** box, enter your new travel question.
3. Click to check the **Display** checkbox, if appropriate.
4. Click the **Save** button to save the new question.
5. When finished, click the **Save** button to save your changes. Click the **OK** button to close the Options window.

Reviewing Common Data

This section explains how to review common data in the **Demob** module.

Information located above the tabs (if any) in the **Manage Resource - Edit Mode** area is considered the **Common Data** for a Resource.

Follow the steps in this section to review common data from Demob:

1. Click the **Demob** button to open the **Demob** window.
2. In the **Resources** grid, click to select a resource.
3. Click the **Edit** button in the **Main** toolbar to display the **Manage Resource - Edit Mode** area at the bottom of the window.
4. Review the following information for completeness and accuracy:

- *Request Number
- *Account Code
- Person - checked, if applicable
- Contracted - checked, if applicable
- *Resource Name
- *Kind/Position
- Trainee - checked, if applicable
- *Status
- Unit ID
- Agency
- *Configuration
- Actual Release Date
- Actual Release Time

A label preceded by an asterisk (*) indicates that the information is required.

When the **Person** option is checked, **Resource Name** is replaced with **Last Name** and **First Name** and an **Other Quals** box displays. Only a **Last Name** or a **First Name** is required. You do not need to define both to save the record.

5. When you have finished reviewing the information, click the **Close** button.

Define Demob Information

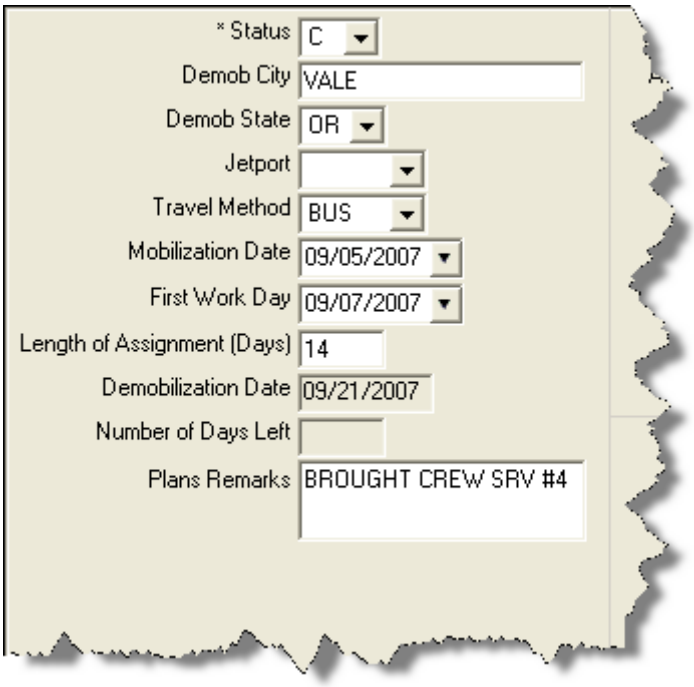
This section explains how to define **Demob** information for **Resources**.

Defining Demobilization Information for a Resource

Chapter 6:Demob

Follow the steps in this section to define demobilization information for a resource:

1. Click the **Demob** button to open the **Demob** window. **Demob** information is defined in the area on the left side of the window.



2. In the **Resources** grid, click the resource for which you want to define demobilization information.
3. Check the following resource data for accuracy or missing information. This information is automatically pulled from Resources. You can make changes, if needed.

a. From the **Status** drop-down list, select the demobilization status to assign to the resource. The following options are available:

- **C** - Check-In
- **D** - Demobed
- **F** - Filled/Not Checked-In
- **P** - Pending Demob
- **R** - Reassigned
- **S** - Staging

When the **D** status is selected, the **Actual Release Date** is required.

b. Enter the appropriate **Demob City**.
c. From the **Demob State** drop-down list, select the demobilization state.
d. From the **Jetport** drop-down list, select the jetport that is being used for the demobilization.
e. From the **Travel Method** drop-down list, select the method in which the resource will be traveling.
F. Enter the **Mobilization Date**.

G. Enter the **First Work Day**.

When you define the **First Work Day** and a **Length of Assignment (Days)**, the system automatically calculates the demobilization date and inserts it into the **Demobilization Date** box. To change this date, adjust the **Length of Assignment Days**. This is important if you are creating **Demob Reports** from the Demob data (e.g. Last Day Work). Some Demob Dates may not need to be adjusted to reflect the current incident status (e.g. rain putting the fire out).

The system automatically calculates the **Number of Days Left** by subtracting the **Demobilization Date** from the **Current System** Date.

g. Enter the **Length of Assignment (Days)** for the resource.
h. The **Plans Remarks** box contains any remarks defined in the **Plans Remarks** box on the **Plans** tab in **Resources**. If needed, you can add remarks or make changes to the text in the **Plans Remarks** box.
i. If the resource is a person, enter the appropriate information in the **Other Quals** area.

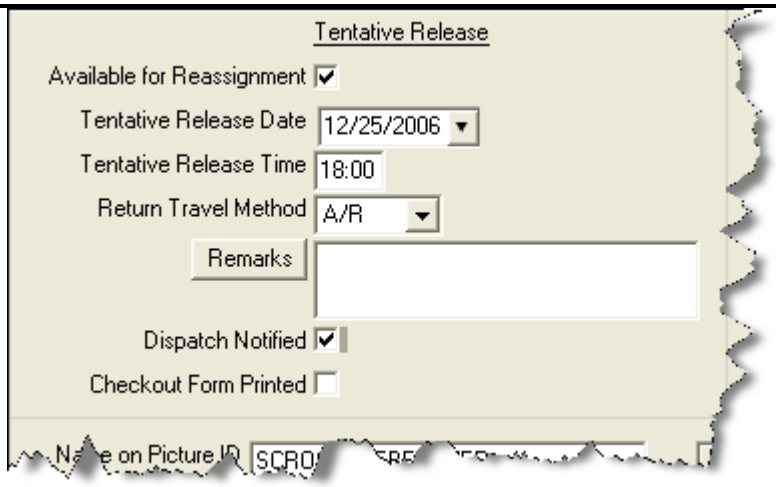
4. When finished, click the **Save** button to save your changes.

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 Team protocol or Standard Operating Procedures when editing data.

Defining Tentative Release Information

Follow the steps in this section to define **Tentative Release** information for the resource:

1. In the **Resources** grid, click to select the resource for which you want to define tentative release information. **Tentative Release** information is defined in the middle area of the window.



2. If the resource is available for reassignment, click to check the **Available for Reassignment** checkbox.

When the **Available for Reassignment** checkbox is checked, **Y** (for Yes) displays in the **Available for Release Report**. **Additional Quals** are then listed.

3. Enter the **Tentative Release Date** for the resource.

When this is defined, the resource is listed on the Tentative Poster and Available for Release Report.

4. Enter the **Tentative Release Time** for the resource.
5. From the **Return Travel Method** drop-down list, select the most likely method of travel the resource will use to return from assignment. (Auto-fills from Common Data.)

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**.

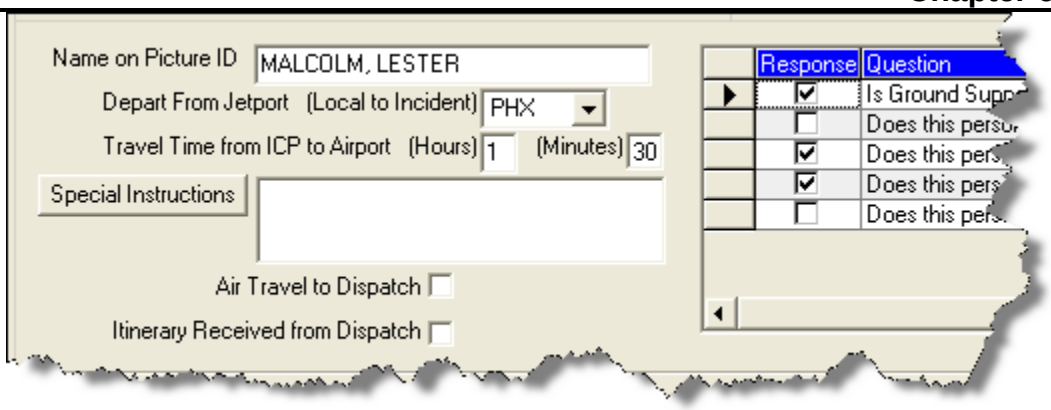
6. In the **Remarks** box, enter any remarks related to the tentative release. If needed, you can click the **Remarks** button to add or review additional remarks.

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

7. If dispatch was notified, click to check the **Dispatch Notified** checkbox.

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 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 Demob** button to print the report again.

8. If the **Return Travel Method** is **A/R** or **AIR**, a Travel area displays at the bottom of the window.



Complete the following steps:

a. Enter the **Name on Picture ID** for the resource. Because of Airline security, the resource must have a legal name on their reservations.

If the **Name on Picture ID** is not defined, the resource's **Name** will NOT print on the Air Travel Request form.

b. Select the jetport method from the **Depart from Jetport** drop-down list. This is the jetport from which the resource is departing.
c. Enter the **Travel Time from ICP to Airport** in the **(Hours)** and **(Minutes)** boxes. This information is important for Ground Support when scheduling shuttles to the airport.
d. If you want to add special instructions for the tentative release, enter them in the **Special Instructions** box. Click the **Special Instructions** button to add even more 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.

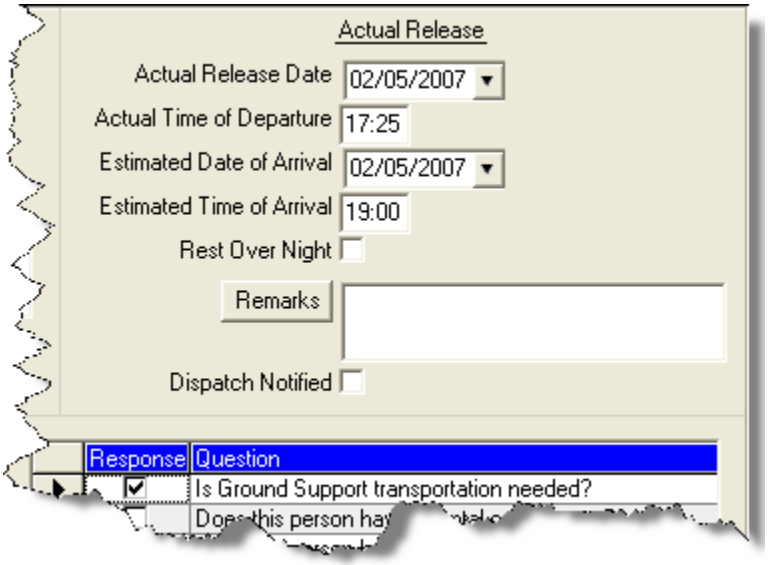
e. If there will be air travel to the dispatch, click to check the **Air Travel to Dispatch** checkbox.
f. If you received an itinerary from dispatch, click to check the **Itinerary Received From Dispatch** checkbox.
g. If the response to any of the **Travel Questions** is **Yes**, click to check the checkbox next to the question. The **Travel Questions** display in the far right bottom of the Demob window.

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

Defining Actual Release Information

Follow the steps in this section to define actual release information for a resource:

1. In the **Resources** grid, click the resource for which you want to define actual release information. **Actual Release** information is defined in the area on the right side of the window.



2. Enter the **Actual Release Date** for the resource.
3. Enter the **Actual Time of Departure** for the resource.
4. Enter the **Estimated Date of Arrival** for the resource.
5. Enter the **Estimated Time of Arrival** for the resource.
6. If the resource is expected to rest overnight, click to check the **Rest Over Night** checkbox.

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

7. In the **Remarks** box, type any remarks that relate to the actual release of the resource. Click the **Remarks** button to add or view additional remarks.

Remarks do not print on the **Actual Release Report**.

8. If dispatch was notified about the release, click to check the **Dispatch Notified** checkbox.

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 report should not be sent again for the resource. If the report needs to be sent again, click to check the **Resource Selected in Grid** checkbox, then select the resource in the grid. Click the **Available for Demob** button to print the report again.

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

Change Status for Multiple Resources

This section explains how to change the status of multiple Resource's to either Pending Demob or Demob.

Changing the Status to Pending Demob

Follow the steps in this section to change the status of multiple resources to Pending Demob:

1. In the Resource's grid, select the resources for which you want to change the **Status** to **Pending Demob**.
2. Click the **P** button. This opens the first selected resource in **Edit** mode and defaults the status to **P** (Pending Demob).
3. Click the **Save and Next** button. Each time you click the **Save and Next** button, the system saves the status change and any other changes made to the demob information. The system then automatically moves to the next selected resource and defaults the status for that resource to **P**.

Changing the Status to Demobed

Follow the steps in this section to change the status of multiple resources to Demobed:

1. In the Resource's grid, select the resources that you want to demob.
2. Click the **D** button. This opens the first selected resource in **Edit** mode and defaults the status to **D** (Demobed).
3. Enter the **Actual Release Date** for each Resource you are demobing.
4. Click the **Save and Next** button. Each time you click the **Save and Next** button, the system saves the status change and any other changes made to the demob information. The system then automatically moves to the next selected resource and defaults the status for that resource to **D**.

Tentative Release Poster

This section explains how to print a **Tentative Release Poster**. This report identifies those resources that are tentatively ready to be released. The Tentative Release Poster is sorted by request category and then by request number.

Tentative Poster Requirements

Only those resources that meet the following requirements are included in the report, unless the **Resources Selected In Grid** checkbox is checked:

If the **Resources Selected in Grid** checkbox is checked, the report prints for those

Resources selected in the grid, regardless of the requirements.

- The **Resource Type** is **C**, **E**, **O** or **A**.
- The **Resource** contains a **Tentative Release Date** and **Time**.

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).

Generating Tentative Poster from Demob

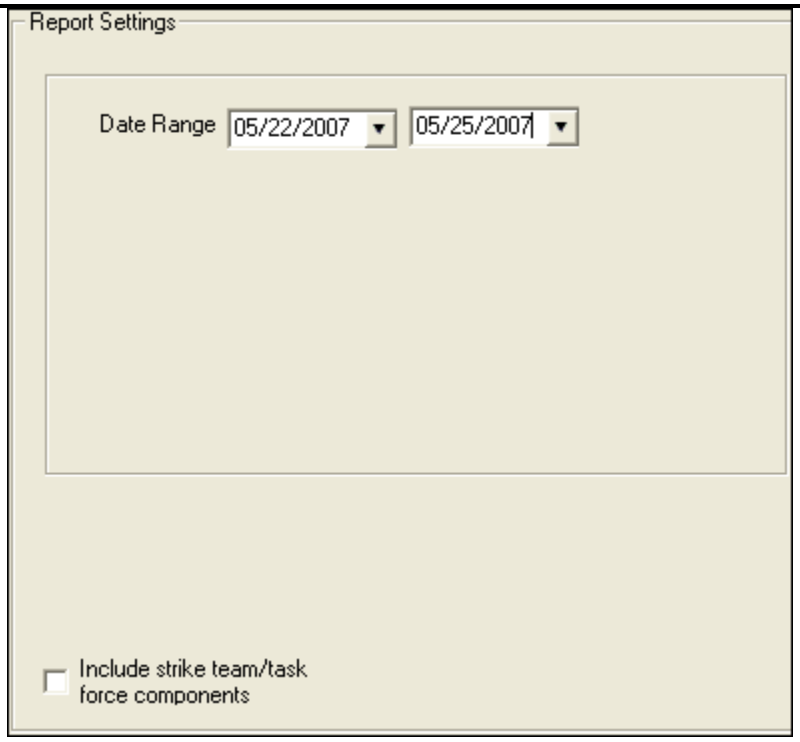
Follow the steps in this section to generate a **Tentative Demob Poster** from the **Demob** window:

1. Click the **Demob** button to open the **Demob** window.
2. Click to check the **Resources Selected in Grid** checkbox.
3. In the **Resources** grid, click each of the resources you want to include in the Tentative Poster.
4. Click the **Tentative Poster** button to print a report for the current date. The report displays in the **Preview** window.
5. Click the **Print Report** button to print the report.

Generating Tentative Poster from Demob Report

Follow these steps to print a **Tentative Demob Poster** from the **Demob Report** window:

1. On the Demob window, click the **Reports** button in the **Main** toolbar.
2. Click the **Tentative Poster** option to display those **Report Settings**.



These report settings also display if the **Resources Selected in Grid** checkbox is not checked, and you click the **Tentative Poster** button on the Demob window.

3. Enter the **Date Range** to include in the report. You can either type the dates or select them from the drop-down lists.
4. If you want to include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
5. If you want to preview the report before you print it, click the **Preview** button. Then click the **Print Report** button to print the report.

   If you want to print the report without previewing it, click the **Print** button. Then click the **Print** button on the **Print** window that displays.

Available for Release Report

This section explains how to print an **Available for Release Report**. This report identifies those resources that are available for release.

Available for Release Report Requirements

Only those resources that meet the following requirements are included in the report, unless the **Resources Selected In Grid** checkbox is checked:

If the **Resources Selected in Grid** checkbox is checked, the report prints for those Resources selected in the grid, regardless of the requirements.

- The **Resource Type** is **C**, **E**, **O**, or **A**
- This **Resource Status** is **P** (Pending)
- The **Dispatch Notified** checkbox is NOT checked for the Resource
- The Resource contains a **Tentative Release Date** and **Time**

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.

Generating Available for Release Report from Demob

Follow the steps in this section to generate an **Available for Release Report** from the **Demob** window:

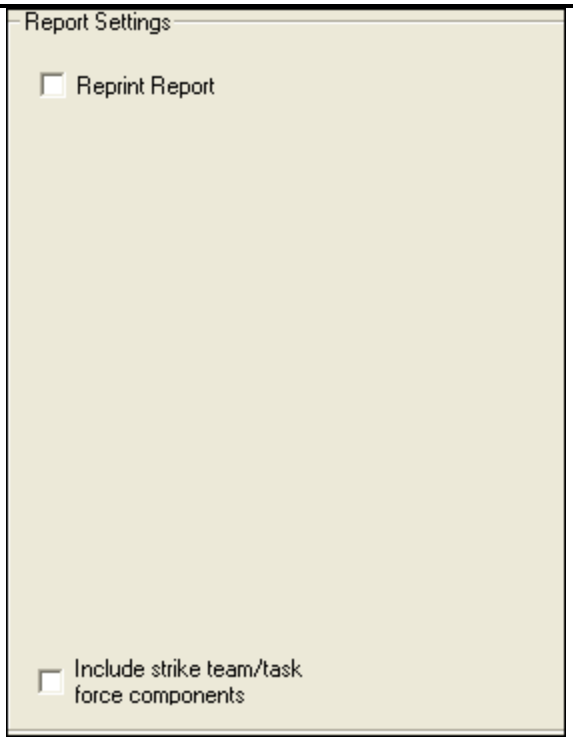
1. Click the **Demob** button to open the **Demob** window.
2. Click the **Available for Release** button on the **Demob** toolbar.
3. The **Preview** window displays with the report. To print the report, click the **Print Report** button.
4. When the prompt displays asking whether you want to automatically 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.
5. When the **Print** window displays, click the **Print** button to print the report.

After printing the report, fax each page of the report to dispatch, as appropriate.

Generating Available for Release Report from Demob Reports

Follow the steps in this section to generate an Available for Release Report from the Demob Reports window:

1. On the Demob window, click the **Reports** button in the **Main** toolbar to open the Demob Reports window.
2. Click the **Available for Release** option to display to display those **Report Settings**.



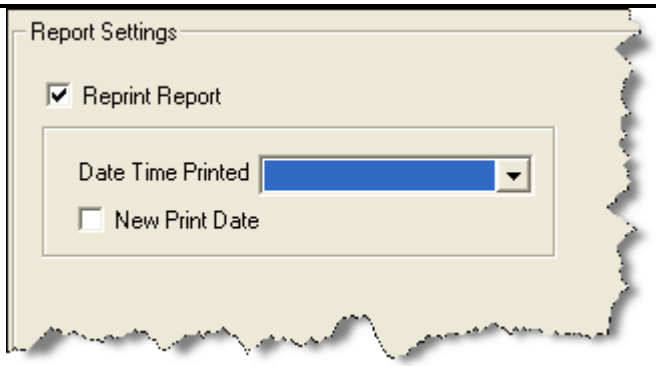
3. To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
4. To preview the report, click the **Preview** button. You can then print the report from the **Preview** window by clicking the **Print Report** button.

   To print the report without previewing it, click the **Print** button on the **Select Reports** window.
5. 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.

Reprinting the Available for Release Report

If you need to reprint the **Available for Release Report**, follow these steps:

1. From the **Reports** drop-down menu, select **Demob Reports**. The **Select Reports** window displays with the **Demob** tab selected.
2. Click the **Available for Release** option to display the **Report Settings**.



3. Under **Report Settings**, click to check the **Reprint Report** checkbox.
4. From the **Date Time Printed** drop-down list, select the date for the report that you want to reprint.
5. To print a new date on the report, click to check the **New Print Date** checkbox.
6. To preview the report, click the **Preview** button. You can then print the report from the **Preview** window by clicking the **Print Report** button.

   To print the report without previewing it, click the **Print** button on the **Select Reports** window. The **Dispatch Notified of Tentative Release** window displays.
7. 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.

Air Travel Request Report

This section explains how to create an **Air Travel Request Form**. This is a form that people can use to request commercial air travel.

Air Travel Request Report Requirements

A form only prints for those resources that meet the following requirements, unless the **Resources Selected In Grid** checkbox is checked:

If the **Resources Selected in Grid** checkbox is checked, the report prints for those Resources selected in the grid, regardless of the requirements.

- The **Resource Status** is **P** (Pending).
- The **Return Travel Method** for the Resource is **A/R** or **Air**.

If the **Resources Selected in Grid** checkbox is checked, and you select a resource with a **Return Travel Method** other than **A/R** or **Air**, the resource's **Name** will NOT print on the **Air Travel Request**.

Because the **Name** on the **Air Travel Request** must be the same as the **Name** defined

on the resource's **Picture ID**, the name will not print on the **Air Travel Request** unless **A/R** or **Air** are the **Return Travel Method** and the **Name on Picture ID** is defined for the Resource.

- 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 closes to incident or where rental car was rented.)
- Special Remarks (e.g. aisle seat because leg is in split.)
- Travel Time (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** (of 14 day tour). This is based on the **Length of Assignment** entry, which is used to calculate the remaining days of the tour. The Last Day Available to Work is the last day of the tour.
- **Other Quals** will be listed.

Generating Air Travel Request from Demob

Follow the steps in this section print an Air Travel Request Report from the Demob window:

1. Click the **Demob** button to open the **Demob** window.
2. Click the **Air Travel Request** button.
3. The report displays in the **Preview** window. Click the **Print Report** button to print the report.
4. 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.

5. When the **Print** window displays, click the **Print** button to send the report to the printer.
6. After printing the report, fax each page of the report to dispatch.
7. When the **Air Travel Itinerary** is received from dispatch, click to check the **Itinerary Received from Dispatch** checkbox for the appropriate Resource(s).

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

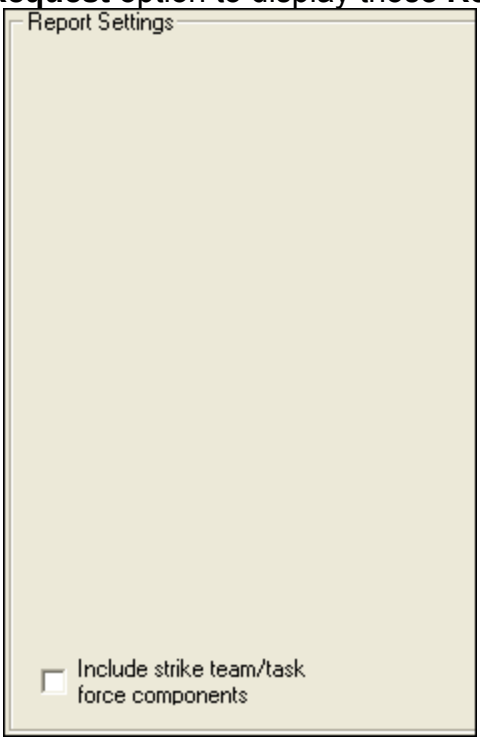
Only **Special Instructions** print on this report. The expanded **Special Instructions** window can only be filled about 1/3 full for all of the information to print on the form. Preview the form to make sure all of the appropriate information displays.

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

Generating Air Travel Request from Demob Reports

Follow the steps in this section to generate an **Air Travel Request** from the **Demob Reports** window:

1. On the Demob window, click the **Reports** button in the **Main** toolbar to open the Demob Reports window.
2. Click the **Air Travel Request** option to display those **Report Settings**.



3. To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
4. If you want to preview the report before you print it, click the **Preview** button. Then click the **Print Report** button to print the report.

   If you want to print the report without previewing it, click the **Print** button. Then click the **Print** button on the **Print** window that displays.
5. 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.

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

Only **Special Instructions** print on this report. The expanded **Special Instructions** window 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 of the appropriate information displays.

The application does not automatically check the **Itinerary Received From Dispatch** checkbox. This is a manual operation to track progress on air travel.

Demobilization Checkout Form

This section explains how to create a **Demobilization Checkout Form**. The Demobilization Checkout Form (ICS-221) must be completed for a resource that is being demobilized.

Demobilization Checkout Form Requirements

Demobilization Checkout Forms are only generated for resources that do NOT have a checkmark in the **Checkout Form Printed** checkbox, unless the **Resources Selected In Grid** checkbox is checked.

If the **Resources Selected in Grid** checkbox is checked, the report prints for those Resources selected in the grid, regardless of the requirements.

Generating Checkout Form from Demob

Follow the steps in this section to generate the **Checkout Form** from the **Demob** window:

1. Click the **Demob** button to open the **Demob** window.
2. Click the **Check Out** button.

If you click the **Checkout** button and the **Resources 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**. If you click the **Yes** button to continue, a checkout form is printed for all of those resources. The forms do not print in any particular order. Make sure this is what you want to do before clicking the **Yes** button.

If you want to print individual forms, rather than all of them, click to check the **Resources Selected in Grid** option. In the **Resources** grid, click each of the resources you want to include, then click the **Check Out** button to generate the forms.

3. The report displays in the **Preview** window. To print the report, click the **Print Report** button.
4. When the prompt displays asking whether to automatically check the **Checkout Form Printed** checkbox, click **Yes** to check it. Click **No** if you do not want to check it.
5. When the **Print** window displays, click the **Print** button to send the report to the printer.

To change the signoff boxes that are automatically checked, follow the instructions for customizing the Checkout Form in See "Selecting Demob Checkout Options".

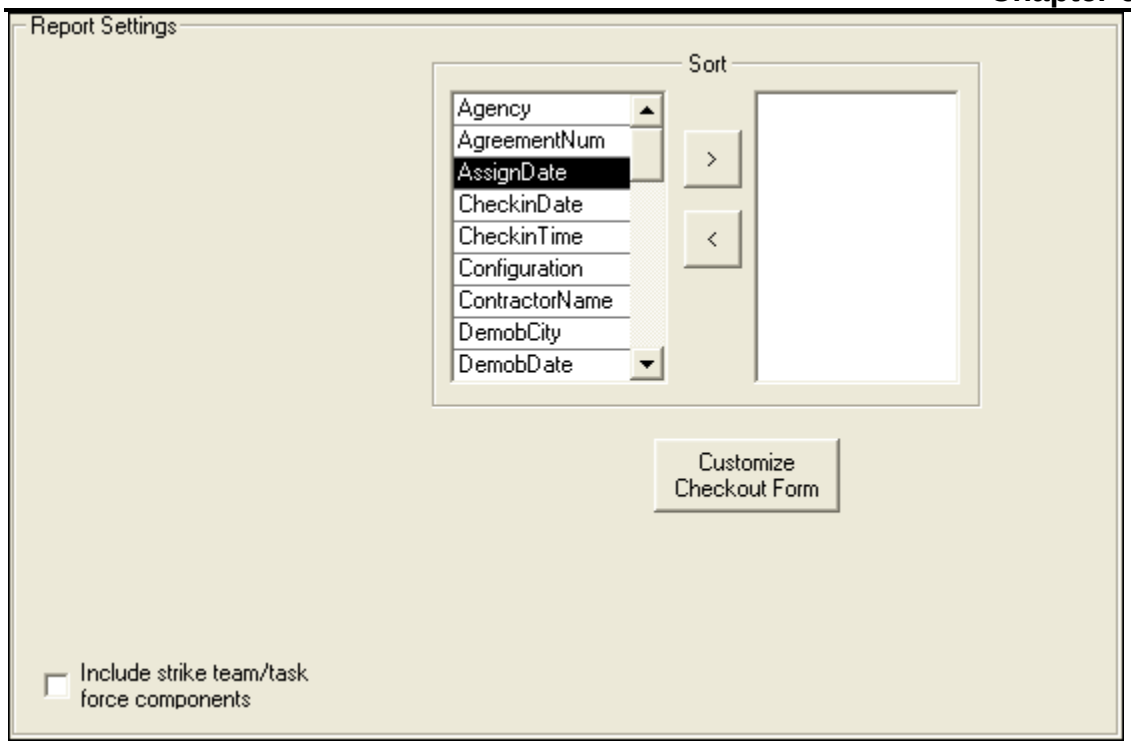
Generating Checkout Forms from Demob Reports

Follow the steps in this section to generate the **Checkout Form** from the **Demob Reports** window:

When you print checkout forms from the **Demob Reports** window, a message displays indicating that **All Resources That Have Not Had a Checkout Form Printed Will Be Printed**. If you click the **Yes** button to continue, a checkout form is printed for all of those resources. The forms print in the order defined under **Sort**.

If you want to print individual forms, rather than all of them, click the **Resources Selected in Grid** option on the **Demob** window. In the **Resources** grid, click to select each resource to include, then click the **Check Out** button.

1. On the Demob window, click the **Reports** button in the **Main** toolbar to open the Demob Reports window.
2. Click the **Checkout Form** option to display those **Report Settings**.



3. Under **Sort**, double click to select each sort to use in the report. 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.

4. To customize the **Checkout Form**, click the **Customize Checkout Form** button. Then follow the instructions in the options section. See "Selecting Demob Checkout Options"
5. To include strike team/task force components, in the report, click to check the **Include strike team/task force components** checkbox.
6. If you want to preview the report before you print it, click the **Preview** button. Then click the **Print Report** button to print the report.

   If you want to print the report without previewing it, click the **Print** button. Then click the **Print** button on the **Print** window that displays.

After a checkout form prints for a resource, the **Checkout Form Printed** checkbox in the **Tentative Release** area is checked. This prevents the form from being printed again. If you need to print another form for that resource, click to check the **Resource Selected in Grid** checkbox. In the Resources grid, click to select the resource, then click the **Check Out** button.

Actual Demob Report

This section explains how to create an **Actual Demob Report**. This report identifies those resources that have been released for demobilization.

Actual Demob Report Requirements

Only those resources that meet the following requirements are included in the report, unless the **Resources Selected In Grid** checkbox is checked:

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

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

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.

Generating Actual Demob Report from Demob

Follow these steps to print an Actual Demob Report from the Demob window:

A new page is generated for each request category on the Actual Demob Report.

1. Click the **Demob** button to open the **Demob** window.
2. Click the **Actual Demob** button.
3. When you click the **Actual Demob** button, the **Preview** window displays with the report. To print the report, click the **Print Report** button.
4. 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.
5. When the **Print** window displays, click the **Print** button to print the report.
6. After printing the report, fax each page of the report to dispatch.

Generating Actual Demob Report from Demob Reports

Follow these steps to print an Actual Demob Report from the Demob Reports window:

1. On the Demob window, click the **Reports** button in the **Main** toolbar to open the Demob Reports window.
2. Click the **Actual Demob** option to display the **Report Settings**.

3. To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
4. If you want to preview the report, click the **Preview** button. To print the report on the **Preview** window, click the **Print Report** button.

   To print the report without previewing it, click the **Print** button on the **Select Reports** window.
5. When the prompt displays asking whether to check **Dispatch Notified of Actual Release** checkbox, click **Yes** to check it. Click **No** if you do not want to check it.
6. When the **Print** window displays, click the **Print** button to send the report to the printer.
7. After printing the report, fax each page of the report to dispatch.

Ground Support Report

This section explains how to create a **Ground Support Report**. This is a form that people can use to request ground support transportation.

Ground Support Report Requirements

A form only prints for those resources that meet the following requirements, unless the **Resources Selected In Grid** checkbox is checked:

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

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

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

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

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

Generating Ground Support Report from Demob

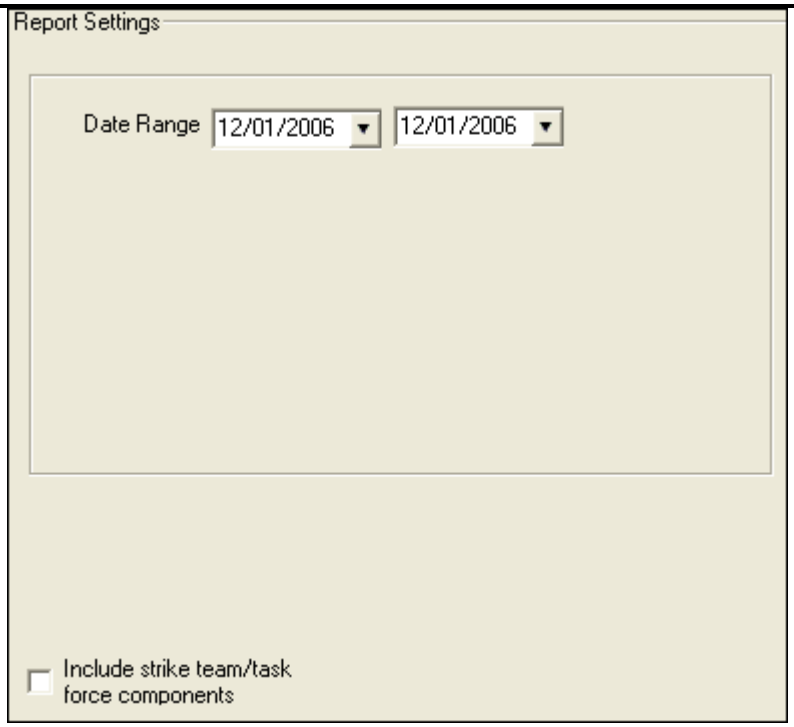
Follow these steps to print a Ground Support Report from the Demob window:

1. Click the **Demob** button to open the **Demob** window.
2. Click to check the **Resources Selected in Grid** option.
3. In the **Resources** grid, click each resource to include in the report.
4. Click the **Ground Support** button to print a report for the current date. The report displays in the **Preview** window.
5. Click the **Print Report** button to print the report.

Generating Ground Support Report from Demob Report

Follow these steps to print a Ground Support Report from the Demob Report window:

1. On the Demob window, click the **Reports** button in the **Main** toolbar to open the Demob Reports window.
2. Click the **Ground Support** option to display the **Report Settings**.



These Report Settings also displays when the **Resources Selected in Grid** checkbox is not checked, and you click the **Ground Support** button on the Demob window.

3. Enter a **Date Range** to include in the report. If you only want to include one date, enter the same date into both boxes.
4. If you want to preview the report, click the **Preview** button. To print the report on the **Preview** window, click the **Print Report** button.

   To print the report without previewing it, click the **Print** button on the **Select Reports** window.
5. When the **Print** window displays, click the **Print** button to send the report to the printer.

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

Other Demob Reports

This section explains how to print standard **Demob** reports.

Print Standard Demob Reports

I-Suite has a number of features that allow you to produce standard reports. Follow the steps in this section to print **Demob** Reports.

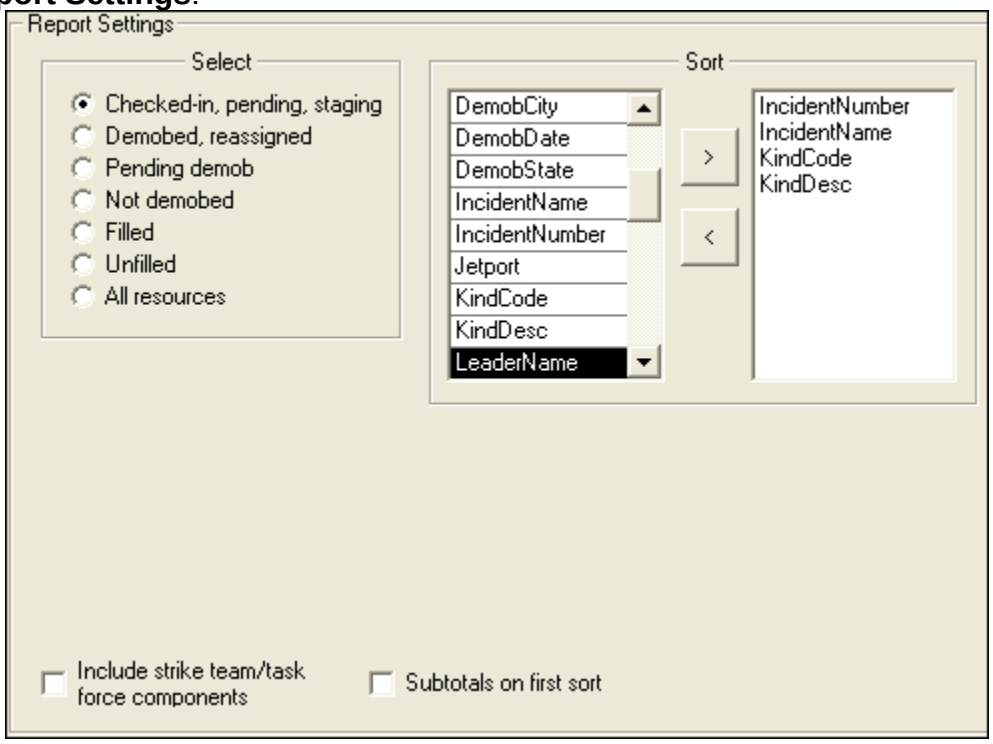
1. On the Demob window, click the **Reports** button in the **Main** toolbar to open the **Demob Reports** window.
3. Click to select one of the following reports:

- Checkout Form See "Demobilization Checkout Form"
- Demob Planning Report See "Demob Planning Report"
- Mob/Demob Report See "Mob/Demob Report"
- Qualifications Report See "Qualifications Report"
- Section Report See "Section Report"
- Tentative Poster See "Tentative Release Poster"
- Available for Release See "Available for Release Report"
- Air Travel Request See "Air Travel Request Report"
- Last Work Day See "Last Work Day Report"
- Actual Demob See "Actual Demob Report"
- Ground Support See "Ground Support Report"

Demob Planning Report

This report identifies resources and their current status for the incident. To generate a Demob Planning Report, complete the following steps:

1. On the **Demob Reports** window, click **Demob Planning Report** to display the **Report Settings**.



2. Under **Select**, click to select one of the following resource categories to include in the report:

- Checked-in, pending, staging
- Demobed, reassigned
- Pending demob
- Not demobed
- Filled
- Unfilled
- All resources

3. Under **Sort**, double click to select each sort to use in the report. The sort order is based on the order in which you select the sort options.

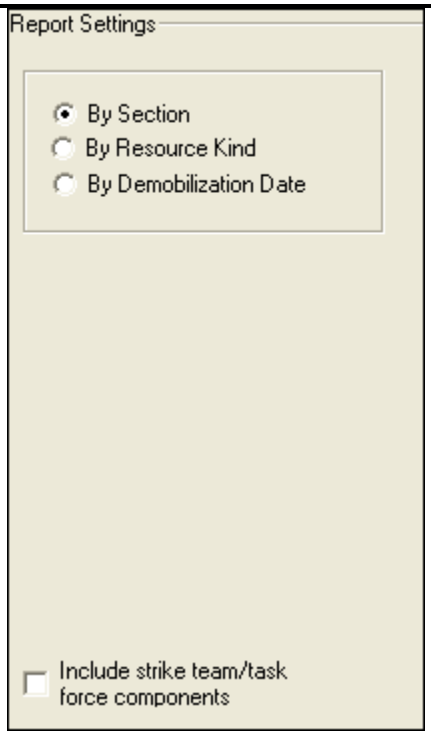
To remove a selected sort, click the sort you want to remove in the right column under **Sort**. Then click the **<** button.

4. To include strike team/task force components, click to check the **Include strike team/task force components** checkbox.
5. To include subtotals on the first sort, click to check the **Include subtotals on first sort** checkbox.
6. To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
7. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.
8. To print the report without previewing, click the **Print** button.

Mob/Demob Report

This report identifies those resources that were demobilized. To generate a Mob/Demob Report, complete the following steps:

1. On the **Demob Reports** window, click **Mob/Demob Report** to display the **Report Settings**.

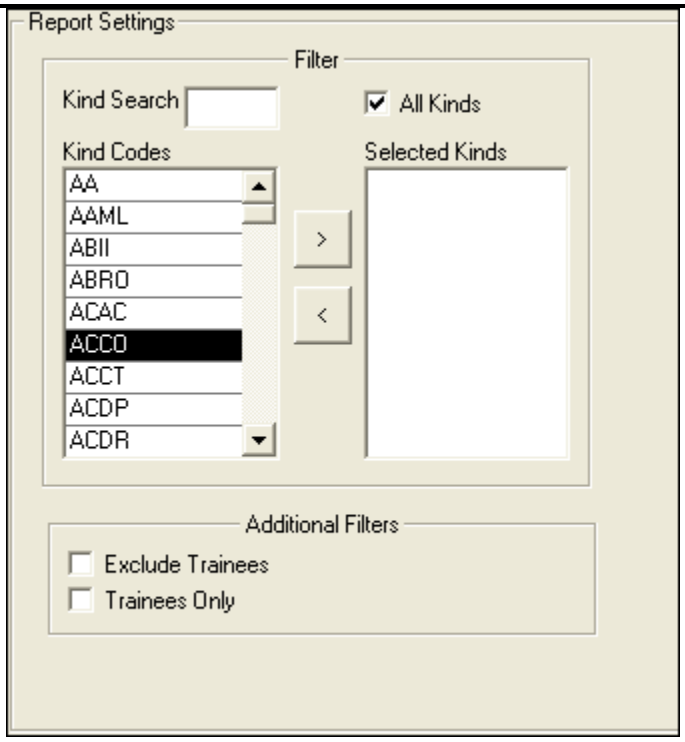


2. Click one of the following options to identify how information is organized in the report:
   - **By Section** - This option groups by section and then sorts the information by Demob Date and then Request Number.
   - **By Resource Kind** - This option groups by Kind Category and then sorts by Kind Code, Demob Date and then Request Number.
   - **By Demobilization Date** - There is no grouping with this option. The data is sorted by Demob Date, Kind Code and then Request Number.
3. To include strike team/task force components in the report, click to check the **Include strike team/task force components** 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.

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, complete the following steps:

1. On the **Demob Reports** window, click **Qualifications Report** to display the **Report Settings**.



2. To include **All Kinds** in the report, click to check the **All Kinds** checkbox.

   To include specific kind codes in the report, double click the code you want to include to move it from the **Kind Codes** list to the **Selected Kinds** list.

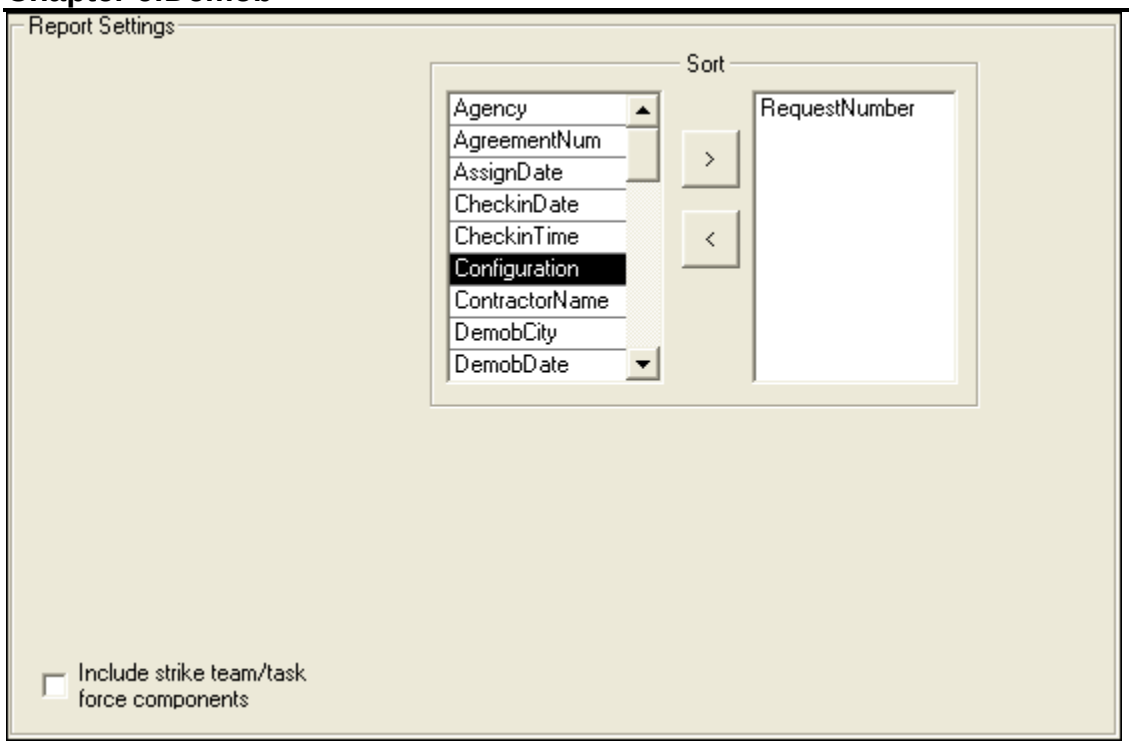
To search for a code listed under **Kind Codes**, enter the code in the **Kind Search** box. The application automatically highlights the code that matches your search term. Double click the kind code or click the **>>** button to add it to the **Selected Kinds** list.

3. If you do not want to include trainees in the report, click to check the **Exclude Trainees** checkbox.
4. If you only want to include trainees in the report, click to check the **Trainees Only** checkbox.
5. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.
6. To print the report without previewing, click the **Print** button.

Section Report

This report identifies those resources assigned to different sections (i.e. Command Staff, Operations Section, etc.). To print a Section Report, complete the following steps:

1. On the **Demob Reports** window, click **Section Report** to display the **Report Settings**.



2. Under **Sort**, double click to select each sort to use in the report. The sort order is based on the order in which you select the sort options.

The **RequestNumber** sort is automatically added as the first sort for the**Section Report**. When the sort is set to **RequestNumber**, the information in the report is grouped by **O**, **C**, **A**, and **E** Request Numbers.

To remove a selected sort, click the sort you want to remove in the right column under **Sort**. Then click the **<** button.

3. To include strike team/task force components, click to check the **Include strike team/task force components** 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.

Last Work Day Report

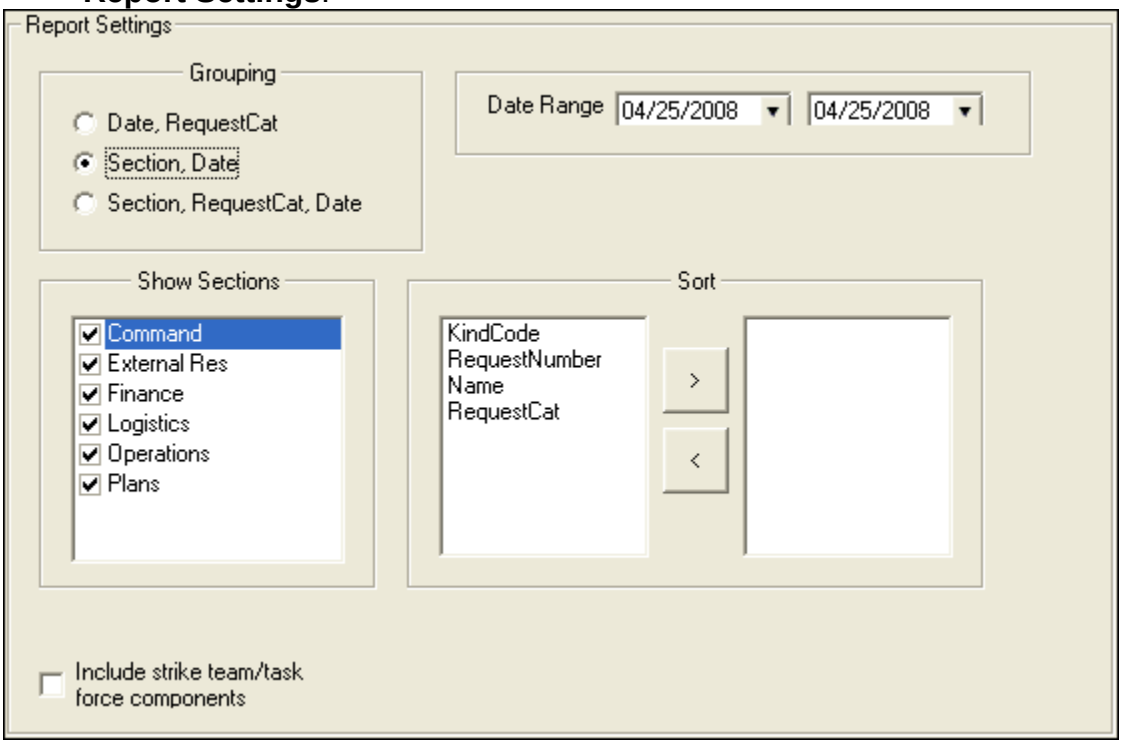
This report identifies those resources with last work days within a defined date range. Only those resources that meet the following requirements are included in the report:

- 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, complete the following steps:

1. On the **Demob Reports** window, click **Last Work Day Report** to display the **Report Settings**.



2. Under **Grouping**, click to select one of the following options:
- **Date,RequestCat** - Select this option to group the data in the report by the Last Work Date and then Request Category.
- **Section,Date** - Select this option to group the data in the report by the Section and then Last Work Date.
- **Section,RequestCat,Date** - Select this option to group the data in the report by the Section, Request Category and then the Last Work Date.
3. In the **Date Range** boxes, enter the range of dates to include in the report. To only include one date in the report, enter the same date into both boxes.
4. When either the **Section,Date** or **Section,RequestCat,Date** are selected, identify the sections to include in the Last Work Day report.

All Sections are automatically selected. If you do not want to include a section, click to uncheck that section.

The following sections are available for the report:
- Command
- External Res
- Finance

- Logistics
- Operations
- Plans

If you are in a 2007 database that was upgraded, an Area Command and a Medical section are also available.

5. Under **Sort**, click to select a sort to use in the report, and then click the right arrow(>) button. Repeat this process for each sort to include in the report. The sort order is based on the order in which you select the sort options.
6. To include strike team/task force components in the report, click to check the **Include strike team/task force components** checkbox.
7. To preview and then print the report, click the **Preview** button. Then click the **Print Report** button.
8. To print the report without previewing, click the **Print** button.

Demob Reports for Selected Resources

This section explains how to generate a **Demob** report for resources selected in the grid.

1. Click the **Demob** button to open the **Demob** window.
2. Click to check the **Resources Selected in Grid** checkbox.
3. In the **Resources** grid, click the resource(s) for which you want to create the **Demob Report**.
4. On the **Demob** tool bar, click the appropriate report button to identify the report you want to print.
5. To print the report from the **Preview** window, click the **Print Report** button.
6. On any **Message** windows that display, click to select the appropriate response.
7. When the **Print** window displays, select the printer where you want to send the report, and then click the **Print** button.

Demob Revision History

Revision Date	Revision Summary
2011-03-31	Revised instructions for the 11.01.00 version of I-Suite.
2010-04-27	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised instructions for the 9.01.00 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Revised instructions for 7.01.00 release of I-Suite.
2007-01-11	Revised instructions based on changes received for Training Manuals.
2006-12-04	Revised instructions by adding more detail and graphics.

2006-06-12 Added instructions for printing a report for a resource selected in the grid. Revised instructions for the 6.02 version of I-Suite.
2006-04-17 Instructions for new module of the new I-Suite 2006 application.

Incident Action Plan

The **Incident Action Plan (IAP)** section explains how to use **IAP** to produce the Incident Action Plan for an incident. In **IAP**, you can produce the following Incident Command System (ICS) forms:

- ICS-202 Incident Objectives
- ICS-203 Organization Assignment List
- ICS-204 Division Assignment Lists
- ICS-205 Incident Radio Communications Plan
- ICS-206 Medical Plan
- ICS-220 Air Operations Summary

Information in the **Incident Action Plan** module may come from other I-Suite modules, including:

- Resources
- Demob
- Time
- Cost
- Supply

IAP can also produce the **Master Frequency List**, which lists radio frequencies for the **ICS-205 Incident Radio Communications Plan**.

Topics in this guide include the following:

- See "Common Features"
- See "Setting Up IAP"
- See "General IAP Form Features"
- See "Creating an ICS-202 (Incident Objectives)"
- See "Creating an ICS 203 (Organization Assignment List)"
- See "Creating an ICS 205 (Incident Radio Communications Plan)"
- See "Creating an ICS 204 (Division Assignment List)"
- See "Creating an ICS 206 (Medical Plan)"
- See "Creating an ICS 220 (Air Operations Summary)"
- See "View, Copy, and Delete Forms and Plans"

- See "Working With Output"

Setting Up IAP

This section identifies how to setup the Incident Action Plan (IAP) area. This process includes:

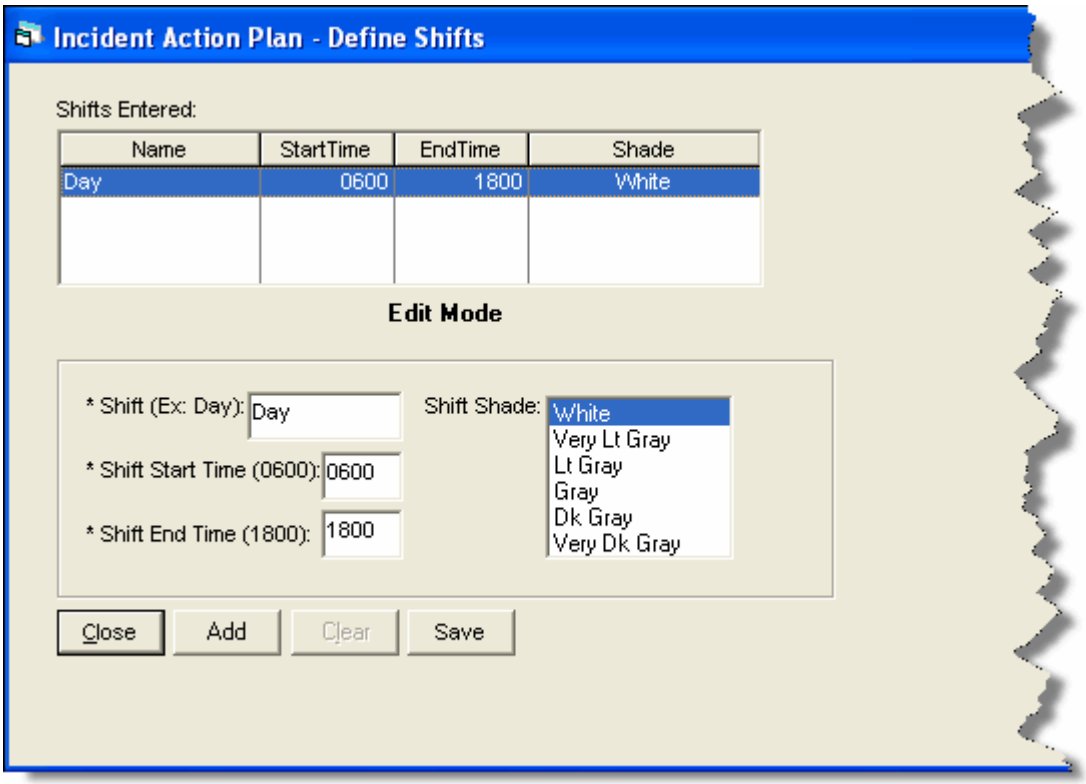
- See "Defining Shifts"
- See "Selecting IAP Options"
- See "Defining ICS 203 Template"
- See "Defining ICS 204 Template"
- See "Defining Master Frequency List"

Defining Shifts

Follow the steps in this section to define Shifts for IAP:

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

1. Click the **IAP** button to open the **IAP** window.
2. From the **Shifts** drop-down menu, select the **Define Shifts** option. The **Define Shifts** window displays:



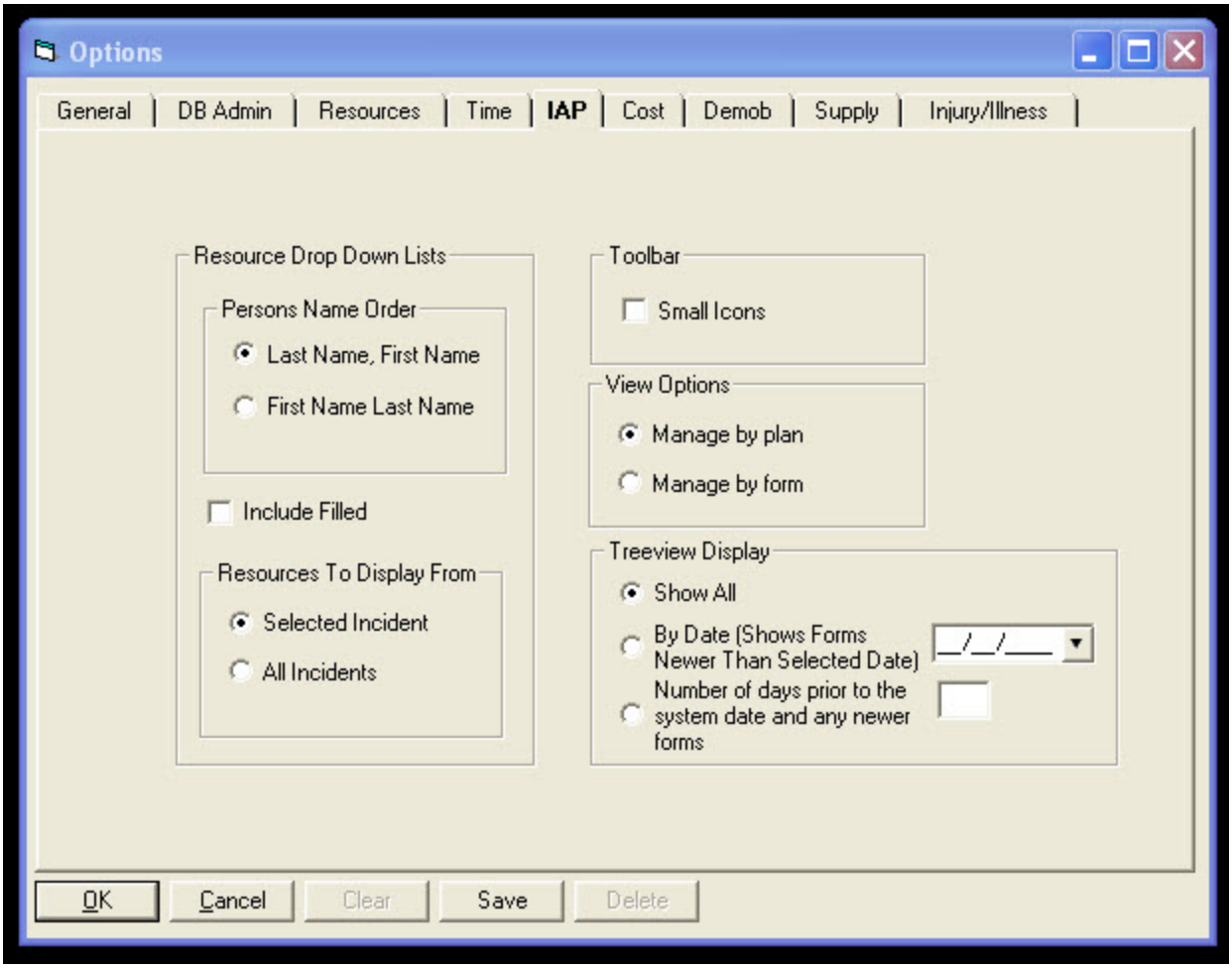
3. In the **Shift** box, enter the name you want to assign to the shift. For example, you could call one shift **Day** and one **Night**.
4. In the **Shift Start Time** box, enter the time when the defined shift begins. Use the military time format. For example, you could type 0600 to indicate 6:00 a.m.
5. In the **Shift End Time** box, enter the time when the defined shift ends. Use the military time format. For example, you could type 1800 to indicate 6:00 p.m.
6. In the **Shift Shade** box, click the shade of color to assign to the shift. The background shade in the **Shifts Entered** box changes to illustrate the shade selected.

   The **Shift Shade** option allows you to color-code the shifts so that you will not confuse the day shift forms with the night shift forms. When you create a form for a given operational period, the **Date/Time** box is color-coded with the shade specified for that shift.
7. Click the **Save** button to save the shift information.
8. Click the **Close** button to close the **Define Shifts** window.

Selecting IAP Options

Follow the steps in this section to select the options to use in the **IAP** area of the I-Suite system:

1. From the **Tools** drop-down, select **Options**. The **Options** window displays.
2. Click the **IAP** tab to select it.



3. If you want name data to display in the order last name and then first name, click the **Last Name, First Name** option.

   If you want the name data to display in the order first name and then last name, click the **First Name Last Name** option.

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.

4. If you want to show the Filled resources that are known to be working on the Incident, click the **Include Filled** option. This is a User option and once set, will affect all databases that the user logs in to. It can be turned off and on by clicking the check box.
5. If you want to only show resources for the incident selected in the **Incident** drop-down on the IAP window, click to check the **Selected Incident** option.

6. If you want to show resources for all incidents, click to check the **All Incidents** option.
7. To reduce the size of the buttons in the IAP toolbar, click to check the **Small Icons** checkbox.
   To change the size back to large buttons, click to uncheck the **Small Icons** checkbox.
8. To change the View Options, click **Manage by Plan** or **Manage by form**. **Manage by form** is the default option.
9. To identify the forms to display in the Tree View on the IAP window, click one of the following options under **Treeview Display**:

- **Show All** - Shows all saved forms.
- **By Date** - When you select this option, all forms with a date that is newer than the defined date display in the Tree View.

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 newer 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.

When you select the **Number of Days** 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.

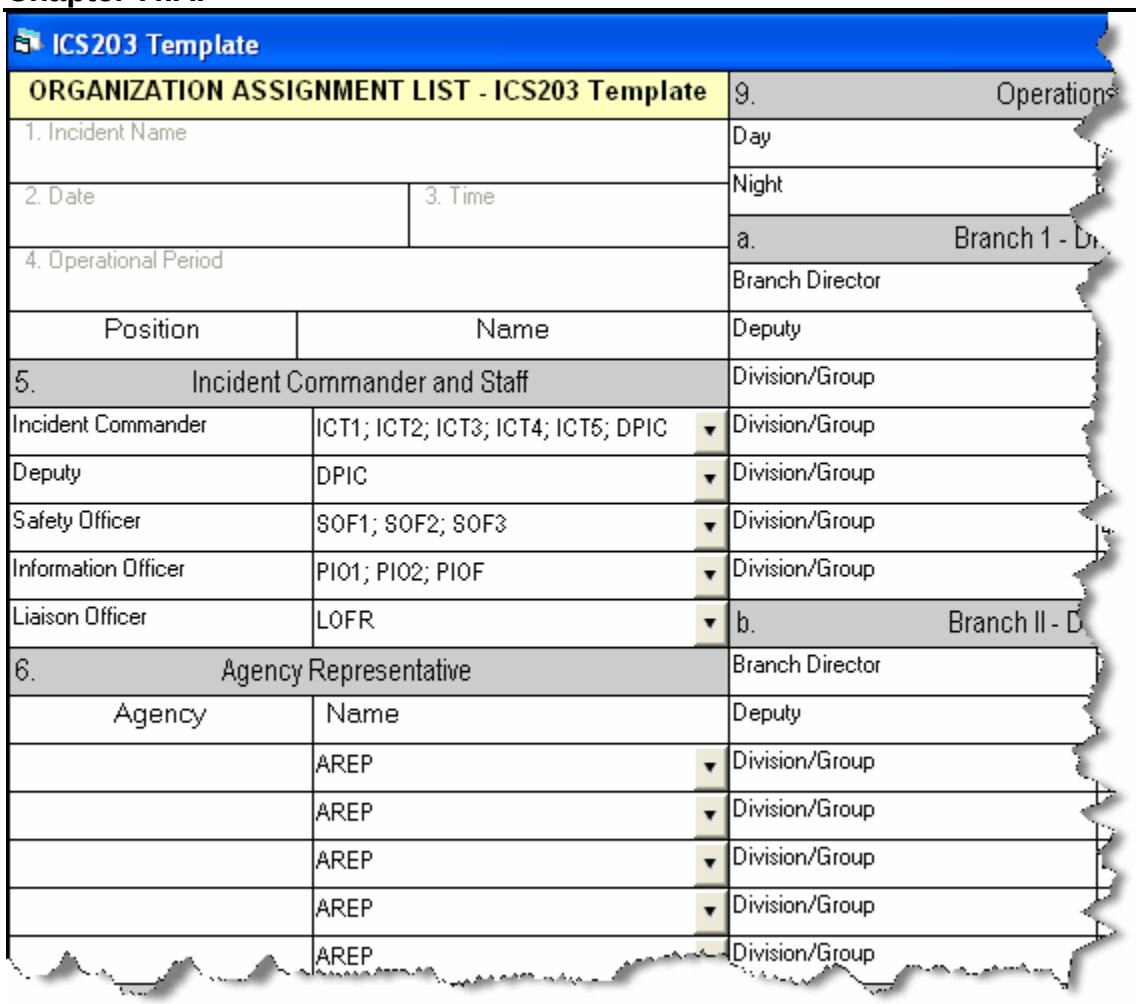
10. Click the **Save** button to apply any changes made to the IAP settings. Click the **OK** button to close the Options window.

Defining ICS 203 Template

Follow the steps in this section to define the ICS 203 Template:

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

1. Click the **IAP** button to display the **IAP** window.
2. From the **Tools** drop-down menu, select the **Form 203 Template** option. The ICS203 Template displays.



3. If needed, you can change the name of the fields in the ICS 203 form. To change a name, highlight the text you want to change. Then type the new name over the old text.
4. Select kind codes from the **Incident Commander and Staff** drop-down lists to filter the codes available on the ICS 203 form.

You can also enter valid kind codes in any of the text boxes on the ICS 203 Template. Separate your entries with a semi-colon.

5. Select kind codes from the **Agency Representative** drop-down lists to filter the codes available on the ICS 203 form.
6. Select kind codes from the **Planning Section** drop-down lists to filter the codes available on the ICS 203 form.
7. Select kind codes from the **Logistics Section** drop-down lists to filter the codes available on the ICS 203 form.
8. Select kind codes from the **Operations Section** drop-down lists to filter the codes available on the ICS 203 form.

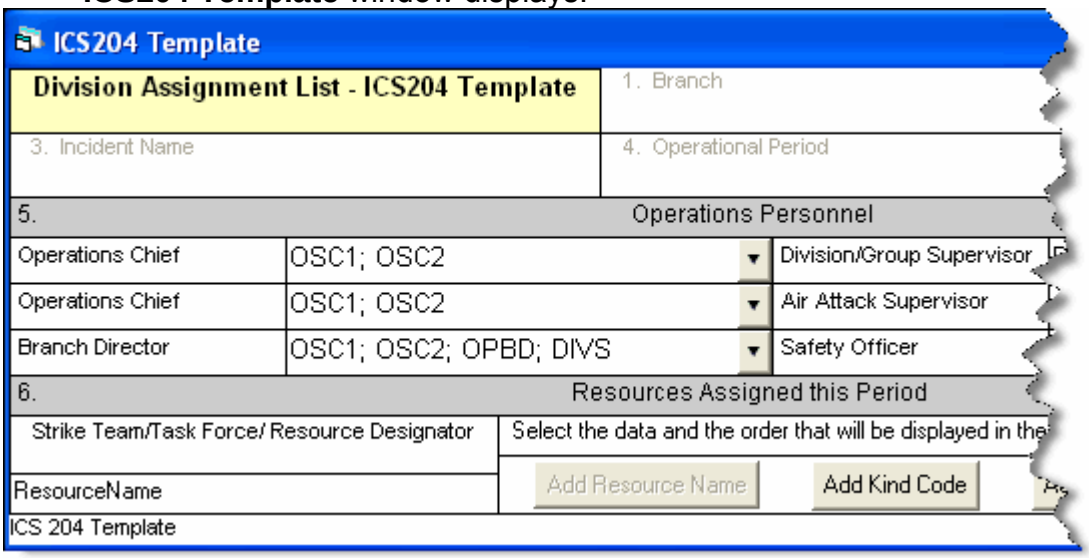
9. Select kind codes from the **Branch I - Division/Groups** drop-down lists to filter the codes available on the ICS 203 form.
10. Select kind codes from the **Branch II - Division/Groups** drop-down lists to filter the codes available on the ICS 203 form.
11. Select kind codes from the **Branch III - Division/Groups** drop-down lists to filter the codes available on the ICS 203 form.
12. Select kind codes from the **Air Operations Branch** drop-down lists to filter the codes available on the ICS 203 form.
13. Select kind codes from the **Finance Section** drop-down lists to filter the codes available on the ICS 203 form.
14. To save any changes made to the ICS 203 Template, click the **Save** button that displays in the **IAP** toolbar.

Defining ICS 204 Template

Follow the steps in this section to define the **ICS 204 Template**:

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

1. Click the **IAP** button to display the **IAP** window.
2. From the **Tools** drop-down menu, select the **Form 204 Template** option. The **ICS204 Template** window displays.



3. If needed, you can change the name of the fields in the ICS 204 form. To change a name, highlight the text you want to change. Then type the new name over the old text.
4. Select kind codes from the **Operations Personnel** drop-down lists to filter the codes available on the **ICS 204** form.

You can also enter valid kind codes in any of the text boxes on the ICS 204 Template.

Separate your entries with a semi-colon.

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

5. Click the buttons in the **Resources Assigned this Period** area to identify the data and order in which to display the data in the **Resource Designator** box on the ICS 204 form. The following buttons are available:

- Add Resource Name
- Add Kind Code
- Add Request Number
- Add Last Day to Work

You must include the **Resource Name** in the template before it will allow you to save any changes to the template.

The order you select identifies the order in which that data is inserted into the **Resource Designator** box. It does NOT change the order of the information in the **Resource Designator** drop-down list.

6. To save any changes made to the **ICS 204 Template**, click the **Save** button that displays in the toolbar above the list of **IAP** forms.

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

Defining Master Frequency List

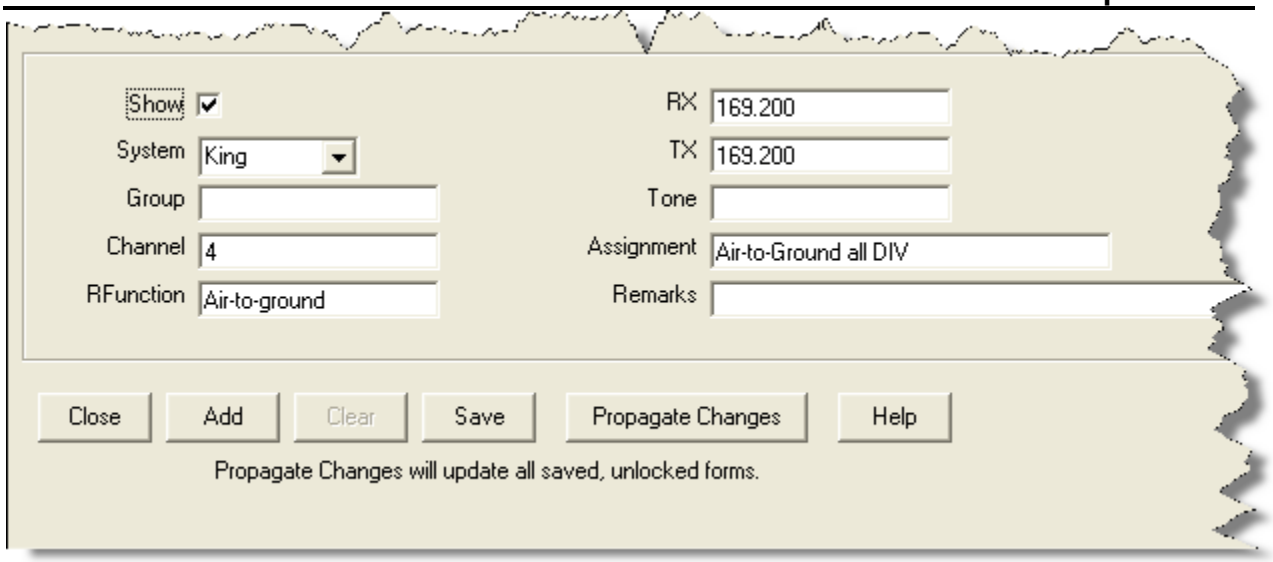
Follow the steps in this section to define the Master Frequency List:

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

Creating the Master Frequency List

Follow these steps to create a Master Frequency List:

1. Click the **IAP** button to open the **IAP** window.
2. To open the **Master Frequency List**, click the **Master Frequency List** option that displays in the **Tree View**.



3. Click the **Add** button to add a new frequency to the **Master Frequency List**.
4. Click to check the **Show** checkbox to include the frequency in the **Frequency** drop-down list on the ICS 205 form.

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.

3. In the **System** box, identify the system to which the frequency is assigned (i.e. NIFC).

You can either type the frequency in the **System** box or you can select a frequency from the drop-down list.

4. In the **Group** box, enter the frequency group.
5. In the **Channel** box, enter the channel in the frequency group.
6. In the **RFunction** box, enter the **Radio Function** group (i.e., Tactical).
7. In the **RX** box, enter the **Receive** frequency for the group and channel.
8. In the **TX** box, enter the **Transmit** frequency for the group and channel.
9. In the **Tone** box, enter the frequency at which to receive the **Talk Tone**.
10. In the **Assignment** box, enter the team assignment (i.e., Initial Attack).
11. In the **Remarks** box, enter any remarks applicable to the frequency.
12. Click the **Save** button to save the frequency to the Master Frequency List.

Editing the Master Frequency List

Follow these steps to edit the frequencies defined in the Master Frequency List:

1. Click the **IAP** button to open the **IAP** window.
2. Click the **Master Frequency List** option in the **Tree View** to open the Master Frequency List.

3. Click the frequency to edit in the grid at the top of the window.
4. Make the applicable changes to the frequency information.
5. Click the **Propagate Changes** button to make changes to the **Group/Channels** already assigned to the ICS 205, ICS 204 and ICS 220 forms. For example, if channel 4 for Group 1 changed to use a tone frequency, use **Propagate Changes** to add those changes to the ICS 205, ICS 204, and ICS 220 forms. This will not change the locked forms or any unsaved forms.

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.

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

6. When you click the **Propagate Changes** button, a message displays asking whether you want to continue. Click the **Yes** button to save the changes to all of the forms that are not locked.

Deleting a Frequency from Master Frequency List

Follow these steps to remove a frequency from the Master Frequency List:

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. Click the **IAP** button to open the **IAP** window.
2. Click the **Master Frequency List** option in the **Tree View** to open the Master Frequency List.
3. Click the row where the frequency is located that you want to remove.
4. Click the **Delete** button in the **Main** toolbar at the top of the window.

This process only deletes the frequency that was selected. It does not remove the Master Frequency List.

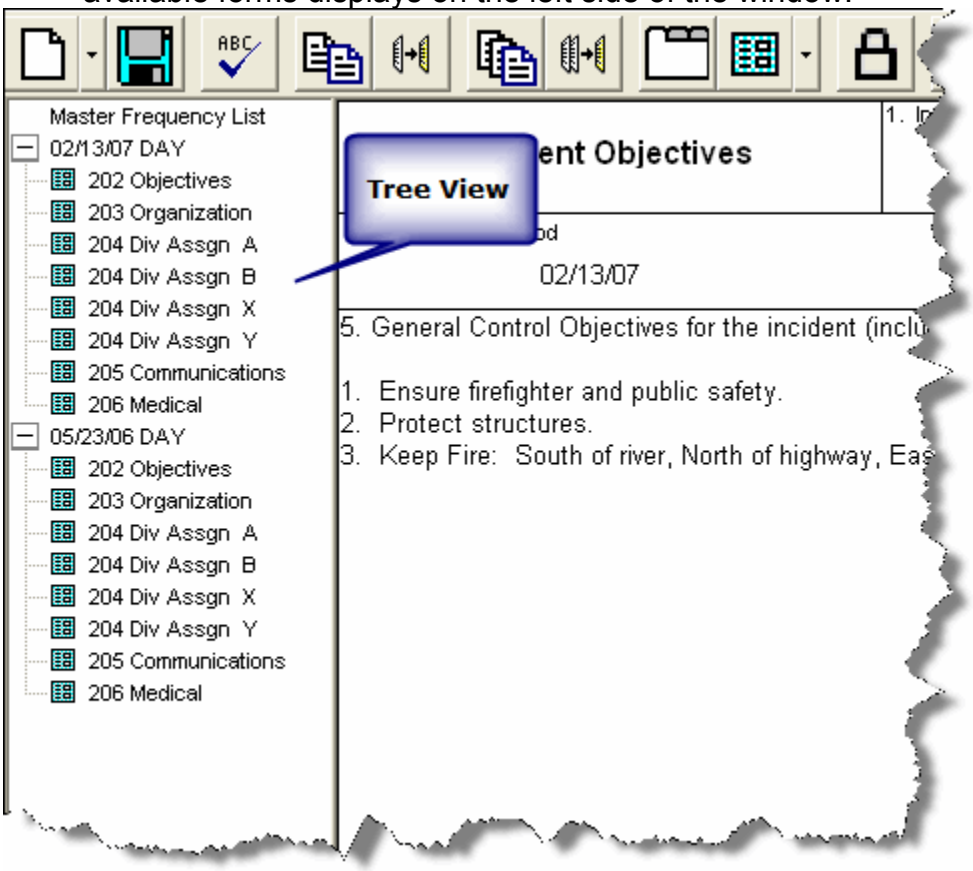
General IAP Form Features

This section explains features that are common to most of the IAP forms. This includes general instructions for creating a new form.

Creating a New Form

Follow these general steps to create a new form in IAP:

1. Click the **IAP** button to open the **IAP** window. A Tree View with a list of the available forms displays on the left side of the window.



2. Click a form name in the **Tree View** to open that form.

You can also click the arrow next to the **Create New Form** button and select a form from the list that displays.

3. Complete the information for the form.
4. To save the form, click the **Save** button in the **IAP** toolbar.

If more than one form is open, click the **Save All** button to save all of the open forms.

Common Features of All IAP Forms

The following features are common to all IAP forms:

- IAP automatically enters the **Incident Name**, **Date**, and **Time** on each form.
- The **Incident Name** field can edited.
- The **Date** and **Time Prepared** identify the current date and time.

- The **Operational Period** identifies the current date and day.
- If you are preparing a form for a date other than the current date, you can manually edit the date that displays 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 that asks if you want to save the form.
- You can manually edit or override almost every entry in a form.
- For most fields on an IAP form, you can make selections from drop-down lists.
- When you press the **Tab** key in a large text box (e.g. Remarks), the application inserts spaces within the text box. This can help you align the text in the large text box.
- When you press the **Tab** key in a small text box (e.g. Phone #), the cursor moves to the next box in the form.
- To show multiple page numbers on a form:
  - Use the scroll bar to scroll to the bottom of the new form.
  - In the **Page** ___ **of** ___ fields, type the page numbers you want to include.

    For example, type page "1" of "2" on the first page of the form. Type page "2" of "2" on the second page of the form.

Spell Checking a Form

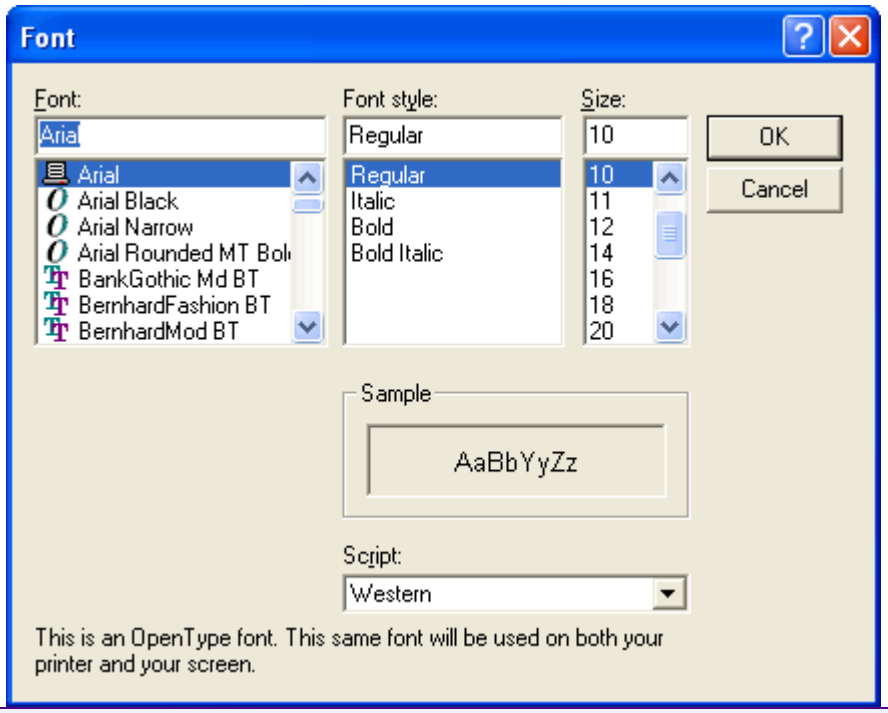
Follow these steps to spell check a form:

1. Open the form you want to spell check.
2. Click the **Spell Check** button in the IAP toolbar to begin the spell check process.
3. If the system finds a spelling error, a **Spelling Check** window displays. On this window you can:
- Select a suggested word and click the **Change** button to change just that instance of the misspelled word.
- Select a suggested word and click the **Change All** button to change all instances of the word to the suggested spelling.
- Click the **Ignore** button to ignore that instances of the misspelled word.
- Click the **Ignore All** button to ignore all instances of the misspelled word.
- Click the **Add** button to add the word to the dictionary. If you add the word to the dictionary, the application will not identify it as misspelled in a future form.
4. When no errors are found in the form, the message **Spell Check Complete** displays. Click the **OK** button to close the message window.
5. When finished, click the **Save** button to save any changes that you made.

Formatting Selected Text

Follow these steps to format text that is selected on a form:

1. Open the form with the text you want to format.
2. Hold down the left mouse button and drag it across the text you want to format. This highlights the text in the form.
3. If you want to make the text bold, click the **Bold** button.
4. If you want to make the text italicized, click the **Italics** button.
5. If you want to underline the text, click the **Underline** button.
6. If you want to change the font style, right click the highlighted text. In the menu that displays, click the **Font** option to open the **Font** window.



You can also open the **Font** window by selecting the **Edit** drop-down menu. Then select the **Format** sub-menu and click the **Font** option.

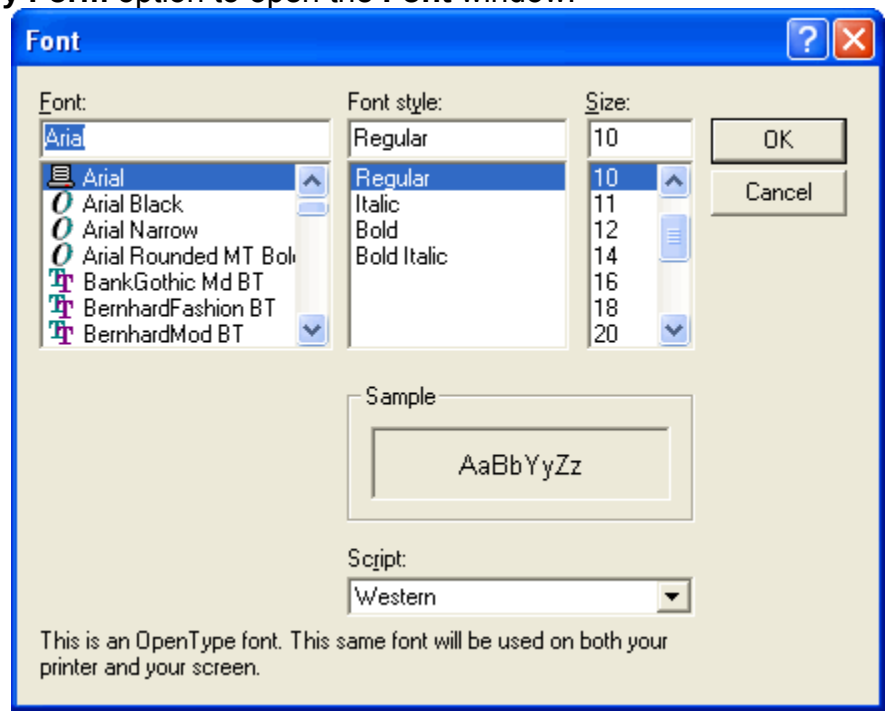
7. Under **Font**, click the font you want to apply to the text.
8. Under **Font Style**, click the style you want to apply to the text.
9. Under **Size**, click the size you want to apply to the text.
10. Click the **OK** button to apply your changes to the text.

You can use the options on the **Font** window to change the font size so text fits within a box on a form.

Changing Font Size for a Form

Follow the steps in this section to change the font size for an entire form:

1. Open the form you want to format.
2. Right click your mouse anywhere in the form. In the menu that displays, click the **Font by Form** option to open the **Font** window.



You can also open the **Font** window by selecting the **Edit** drop-down menu. Then select the **Format** sub-menu and the **Font by Form** option.

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

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 Formatting Selected Text See "Formatting Selected Text".

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

Resizing Areas on a Form

The up and down arrows that display on the right-hand side of larger-sized text boxes can be used to adjust the size of text boxes, as needed. To resize a text box, click the **Up Arrow** (↑) or the **Down Arrow** (↓) next to the text box.

Marking a Form Final vs. Draft

When a form is created, the system automatically marks it as **Draft** at the top and bottom of each page, until you finalize it. Follow these steps to finalize a form and lock it:

1. Double click the form in the **Tree View** that you want to finalize.
2. On the **IAP** toolbar, click the **Mark Final** button.

When you mark a form Final, the following changes occur:

- A **Final** status is assigned to the form.
- The form is **Locked**. No changes can be made to the form.
- The label on the **Mark Final** button changes to **Mark Draft**.

Unlocking a Finalized Form

Once you mark a form as **Final**, you must first unlock the form before you can edit it. Follow these steps to unlock a form:

1. Click the form in the **Tree View** that you want to unlock.
2. On the **IAP** toolbar, click the **Mark Draft** button.

When you mark a form Draft, the following changes occur:

- A **Draft** status is assigned to the form.
- The form is **Unlocked**, which means changes can now be made to the data in the form.
- The label on the **Mark Draft** button changes to **Mark Final**.

Opening a Closed Form

Use one of the following methods to open a form that is closed:

- Click the form you want to open in the **Tree View**.
- When **Manage by Plan** is selected for the **Tree View**, right click a plan listed in the **Tree View**. Select the **Open All Forms** option from the menu that displays. This opens all of the forms in the plan.

Closing an Open Form

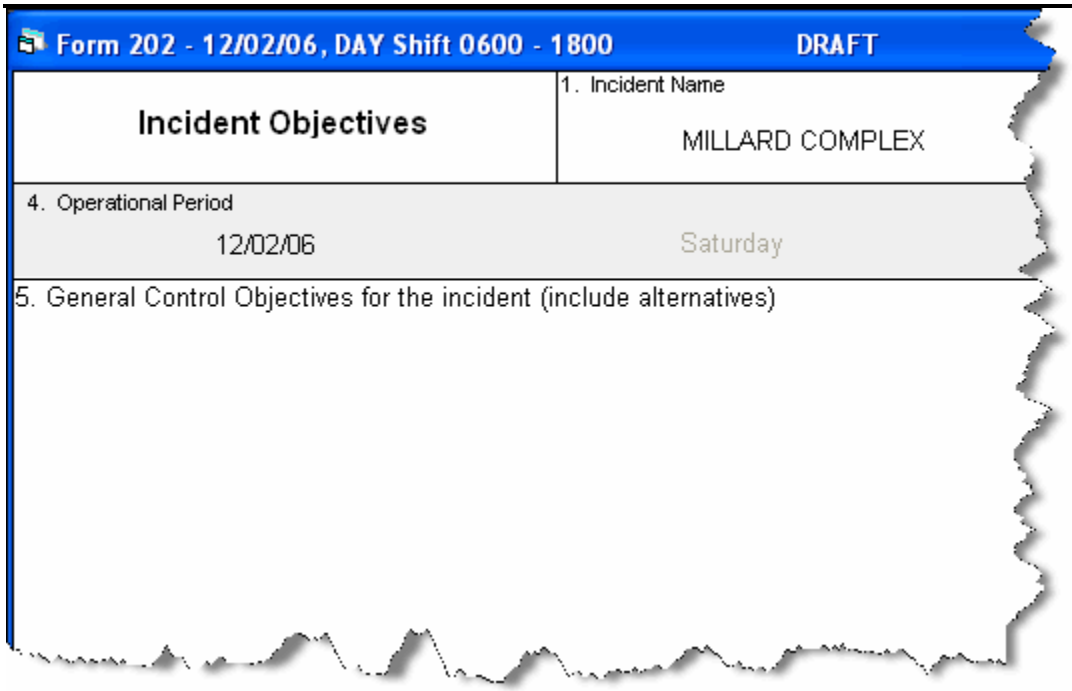
Use one of the following methods to close a form that is open:

- From the **File** drop-down menu, select the **Close Form** option.
- Right click an open form and select the **Close** option from the menu that displays.
- Click the **Close** button (**X**) that displays in the upper right corner of the window.
- From the **Windows** drop-down menu, select the **Close All Forms** option.
- When **Manage by Plan** is selected for the **Tree View**, right click a plan listed in the **Tree View**. Select the **Close All Forms** option from the menu that displays.

Creating an ICS-202 (Incident Objectives)

Follow the steps in this section to create an ICS 202 – Incident Objectives form.

1. Click the **IAP** button to open the IAP module.
2. Double click the **ICS202** option in the **Tree View** to open a blank ICS202 Form.



3. From the **Operational Period** drop-down list, select the appropriate **Shift**.
4. Complete the following information:
- General Control Objectives for the incident (include alternatives)

5. Weather Forecast for Period
6. General Safety Message

6. Under **Attachments**, click to select all that apply:
- Organization List – ICS 203
- Division Assignment Lists – ICS 204
- Communications Plan – ICS 205
- Medical Plan – ICS 206
- Air Operations Summary – ICS 220
- Incident Map
- Safety Message
- Traffic Plan

7. To add an **Additional Attachment**, click to check the checkbox next to a blank line, and then enter the appropriate **Attachment** next to that checkbox.

1. Enter the name of the **Prepared by (Planning Section Chief)**.
- Enter the name of the **Approved by (Incident Commander)**.
- When finished, click the **Save** button in the **IAP** toolbar.

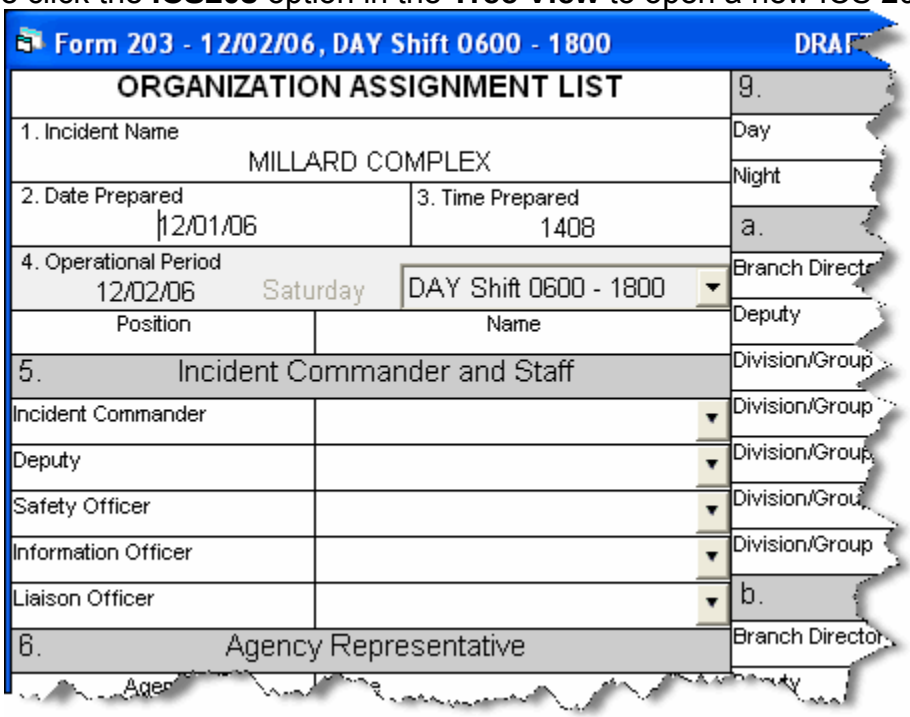
Creating an ICS 203 (Organization Assignment List)

Follow the steps in this section to create an ICS 203 – Organization Assignment List form. The ICS 203 identifies which positions are filled and who filled them.

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 the name.

Keep in mind that some position boxes display the positions of more than one position KindCode.

1. Double click the **ICS203** option in the **Tree View** to open a new ICS 203 form.



2. For each position, select the appropriate person from the available drop-down lists.

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

Additional names may not display completely on your screen, and will not print correctly. To allow additional names to display correctly, you can reduce the font size.

Most labels and headings can be customized, as needed.

3. In the **Agency Representative** area, enter the agency for each agency representative.
3. Enter the name of the **Prepared by (Resource Unit Leader)**.
4. Click the **Save** button in the **IAP** toolbar.

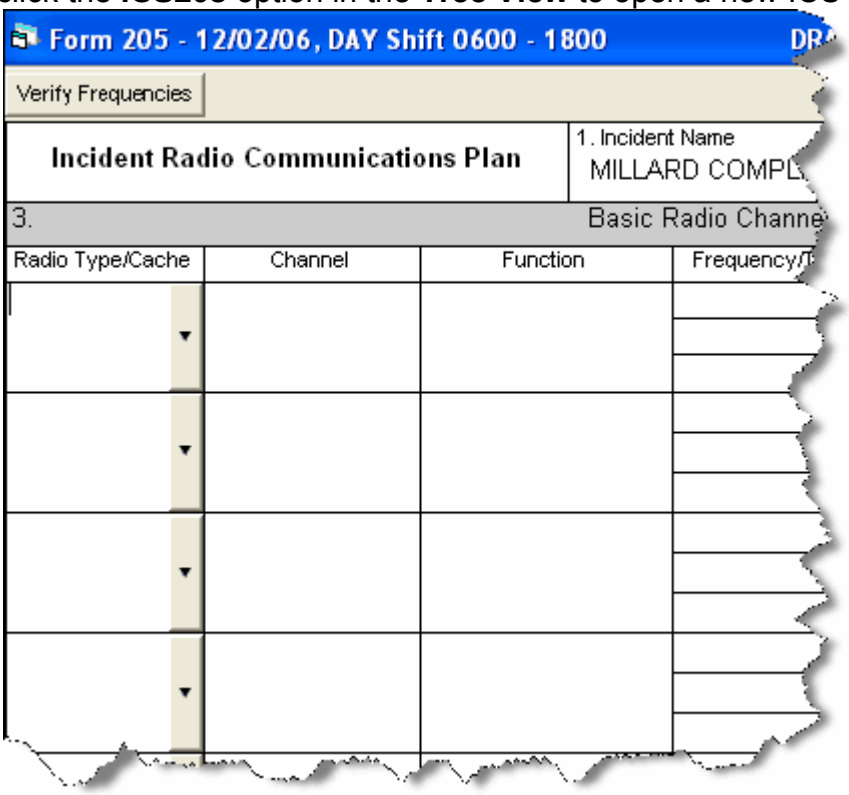
Creating an ICS 205 (Incident Radio Communications Plan)

Follow the steps in this section to create an ICS 205 – Incident Radio Communications Plan form. The Communications leader completes the ICS 205.

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.

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

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



2. For each frequency, select the appropriate option from the **Radio Type/Cache** drop-down list.

When you select the frequency, I-Suite automatically inserts the remaining data from the Master Frequency List into the form.

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

- All frequencies on the ICS 204 and ICS 205 are approved frequencies on the MFL.

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

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

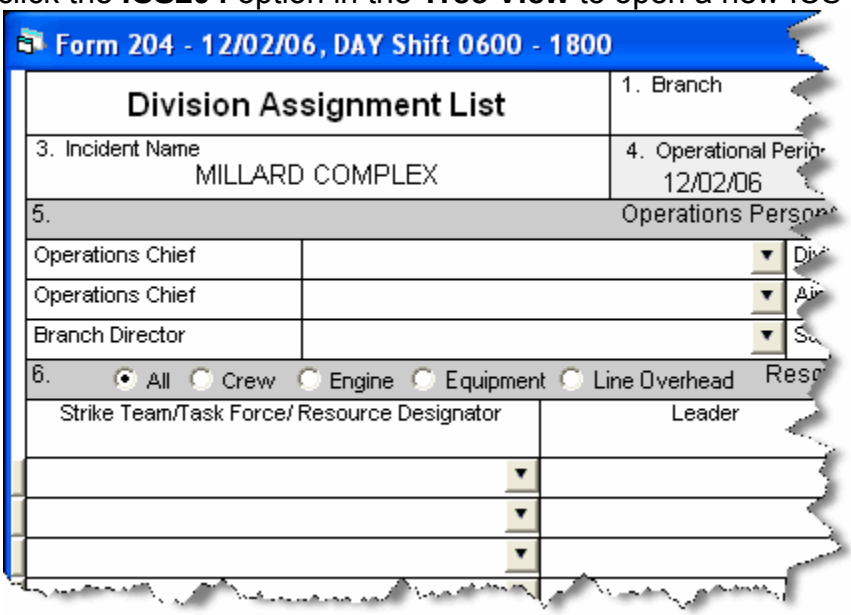
4. Complete the rest of the form, as applicable.

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

Creating an ICS 204 (Division Assignment List)

Follow the steps in this section to create an ICS 204 – Division Assignment List form.

1. Double click the **ICS204** option in the **Tree View** to open a new ICS 204 form.



2. In the **Branch** name box, type the appropriate branch name.
2. In the **Division/Group** box, type the name of the division or group.
3. From the **Operational Period** drop-down list, select the appropriate **Shift**.
4. In the **Operations Personnel** area, select the person to assign to each position from the available drop-down lists.

5. Under **Resources Assigned this Period**, click one of the following options to identify the information to include in the **Strike Team/Task Force/Resource Designator** drop-down list:

- **All** – All resources are included in the list.

3. **Crew** – Only hand crews are included in the list.
4. **Engine**– Only engines are included in the list.
5. **Equipment**– Only equipment is included in the list (i.e. dozers, water tenders, tractor plows, and other heavy equipment).
6. **Line Overhead** – Only individual line overhead personnel is included in the list (i.e. Strike Team Leaders and Field Observers).
6. From the **Strike Team / Task Force / Resource Designator** drop-down list, select the appropriate resource.

If you select the resource from the drop-down list, the application will automatically identify the leader and the number of persons from the database. You will need to identify **Trans** (Transportation Needed), **Drop Off Pt/Time** and **Pick Up Pt/Time**.

OR

Manually complete the following text boxes for each resource, as appropriate:

- Strike Team/Task Force/Resource Designator

If you enter a resource that was already assigned to the period, a warning message displays. If you want to assign the resource for a second time, click the **OK** button. If you do not want to assign the resource to the period again, click the **Cancel** button.

- Leader
- Number of Persons
- Trans (Transportation Needed)
- Drop Off PT./Time
- Pick Up PT./Time.

Complete the **Drop Off** and **Pick Up Locations** and **Times** for the first resource. Then click the **Auto-Fill** buttons to fill-in the same information for the remaining locations and times for all other resources.

Edit the **Drop Off** and **Pick Up Locations** and **Times**, as needed.

7. Complete the following text boxes, as appropriate:

- Control Operations

8. Special Instructions.

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.

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

8. From the **Division/Group Communications Summary** drop-down list, select the appropriate **Frequency – RX** for each **Function**.

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

OR

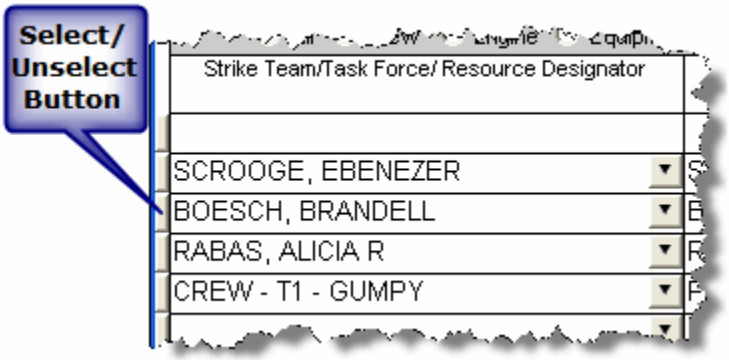
Complete the following boxes for each **Function**, as needed:

- Frequency - RX
9. Frequency - TX
10. Tone
11. System
12. Channel
13. System
14. Channel.
9. Enter the name of the **Prepared By (Resource Unit Leader)**.
- Enter the name of the **Approved By (Planning Section Chief)**.
- Click the **Save** button in the IAP toolbar to save the ICS 204 form.

Cut, Copy, Paste, Insert, Move, and Delete Rows

You can Cut, Copy, Paste, Insert, Move, and Delete Rows on the ICS 204 form. Follow these steps to perform these functions:

1. Click the **ICS204** form you want to edit in the **Tree View**.
10. 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**.



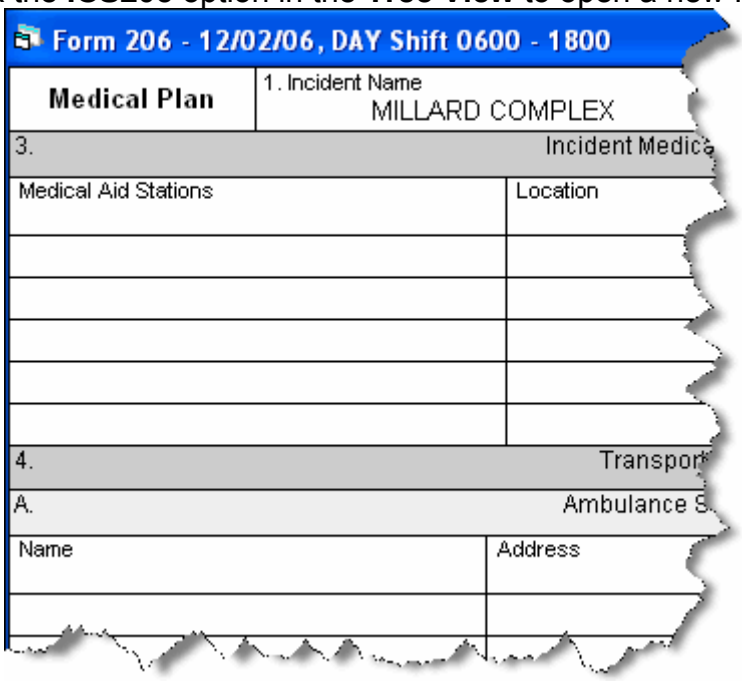
3. To **Copy** a row, highlight the information in the row you want to copy. Then right click the row. From the menu that displays, select **Copy**.

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.

Creating an ICS 206 (Medical Plan)

Follow the steps in this section to create an ICS 206 – Medical Plan form. The ICS 206 – Medical Plan is a narrative, fill-in form.

1. Double click the **ICS206** option in the **Tree View** to open a new ICS 206 form.



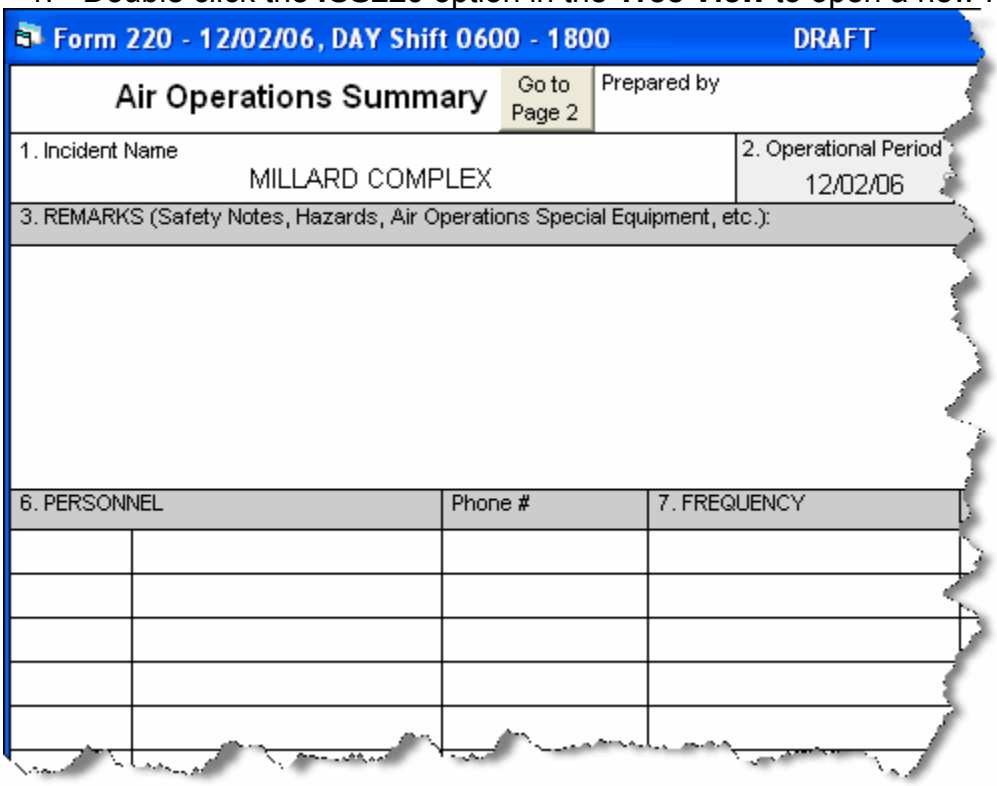
2. Complete the following sections, as appropriate:
- Incident Medical Aid Station
3. Ambulance Services
4. Incident Ambulances.
3. In the **Paramedics** column for each section, click to check either the **Yes** or **No** checkbox. This identifies whether there are available **Paramedics** for each type of medical service.

- Complete the **Hospitals** section. Then click to check either the **Yes** or **No** checkboxes. This identifies whether a **Helipad** and **Burn Center** are available.
- Enter the **Medical Emergency Procedures**, as appropriate.
- Enter the name of the **Prepared By (Medical Unit Leader)**.
- Enter the name of the **Reviewed By (Safety Officer)**.
- Click the **Save** button in the **IAP** toolbar.

Creating an ICS 220 (Air Operations Summary)

Follow the steps in this section to create an ICS 220 – Air Operations Summary form. The **ICS 220 – Air Operations Summary** is mostly a narrative, two-page form.

1. Double click the **ICS220** option in the **Tree View** to open a new ICS 220 form.



2. Complete the following information:

When the header information (**Prepared by, Sunrise, Sunset**, etc.) is completed for page 1, the same information is automatically transferred to page 2.

- Prepared by – (Air Operations Leader Name)

3. Sunrise
4. Sunset
5. REMARKS

6. MEDEVAC AIRCRAFT
7. TFR
8. PERSONNEL
9. FREQUENCY – (Select the appropriate frequency from the AM RX/TX and FM RX/TX drop-down list.)

Frequencies are automatically completed with frequencies from the ICS 205 form.

- FIXED WING
- HELICOPTERS.

3. To advance to the next page of the form, click the **Go to Page 2** button at the top of the form.
- Complete the **TASK/ MISSION/ ASSIGNMENT** section, as appropriate.
- When finished, click the **Save** button in the **IAP** toolbar.

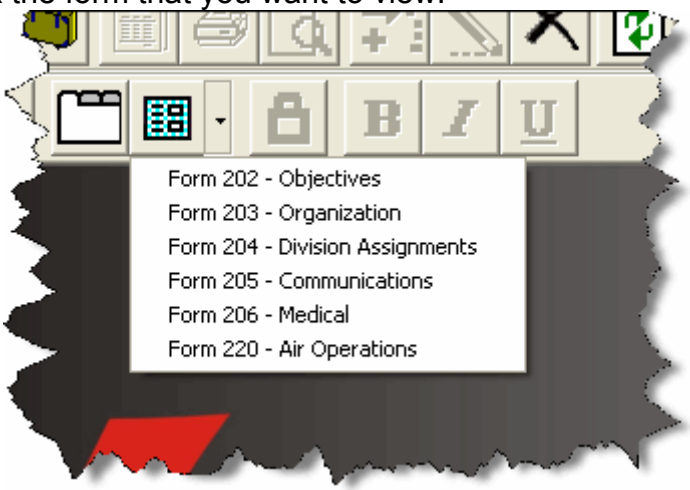
View, Copy, and Delete Forms and Plans

This section explains how to view, copy, and delete IAP forms and plans.

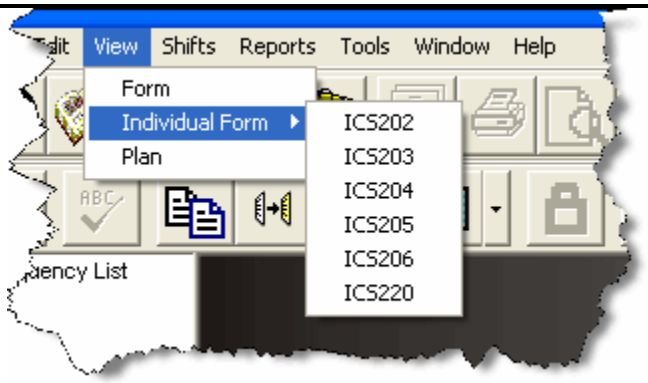
Viewing a Single Type of Form

When you view a single type of form, the Tree View lists all forms of that type by date. There are two ways to display a single type of form in the Tree View:

1. Click the drop-down arrow next to the **Manage by Form** button. From the list that displays, click the form that you want to view.



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



Viewing All Forms Grouped by Form Number

When viewing all forms grouped by the form numbers, the forms are listed under the form number by date. There are two ways to display forms by form number:

1. From the **View** drop-down menu, select the **Form** option.
3. Click the **Manage By Form** button.

Viewing All Forms Grouped by Incident Action Plan

When viewing all forms grouped by plan, all of the forms created for the plan are listed under the plan date. There are two ways to display forms by plan:

1. From the **View** drop-down menu, select the **Plan** option.
2. Click the **Manage By Plan** button.

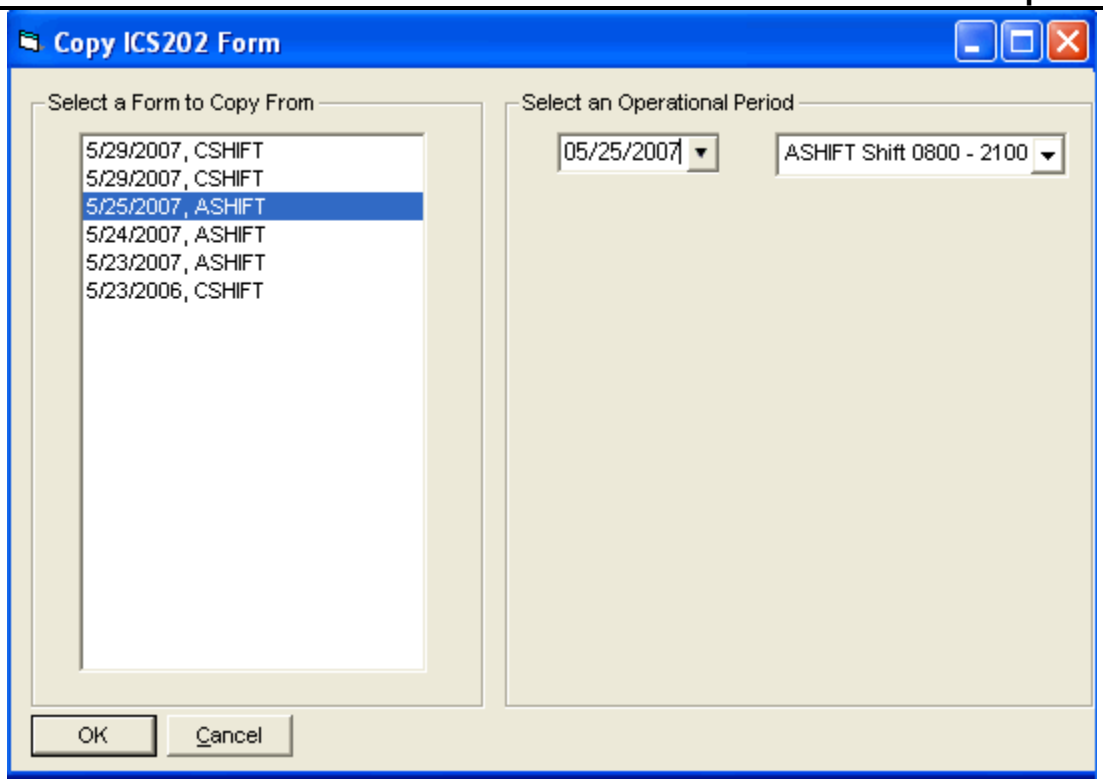
Copying a Form

Use the **Copy Form** option to add a second page to a form. This 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.

You can also use the **Copy Form** option to create a new form when the operational period changes, but much of the information on the form remains the same.

Follow the steps in this section to use the **Copy Form** option.

1. In the **Tree View**, click to select the form you want to copy.
2. Click the **Copy Form** button to open the **Copy Form** window.



3. 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.
2. Under **Select an Operational Period**, select the **Date** and **Shift** to use for the **Operational Period** on the form that is copied

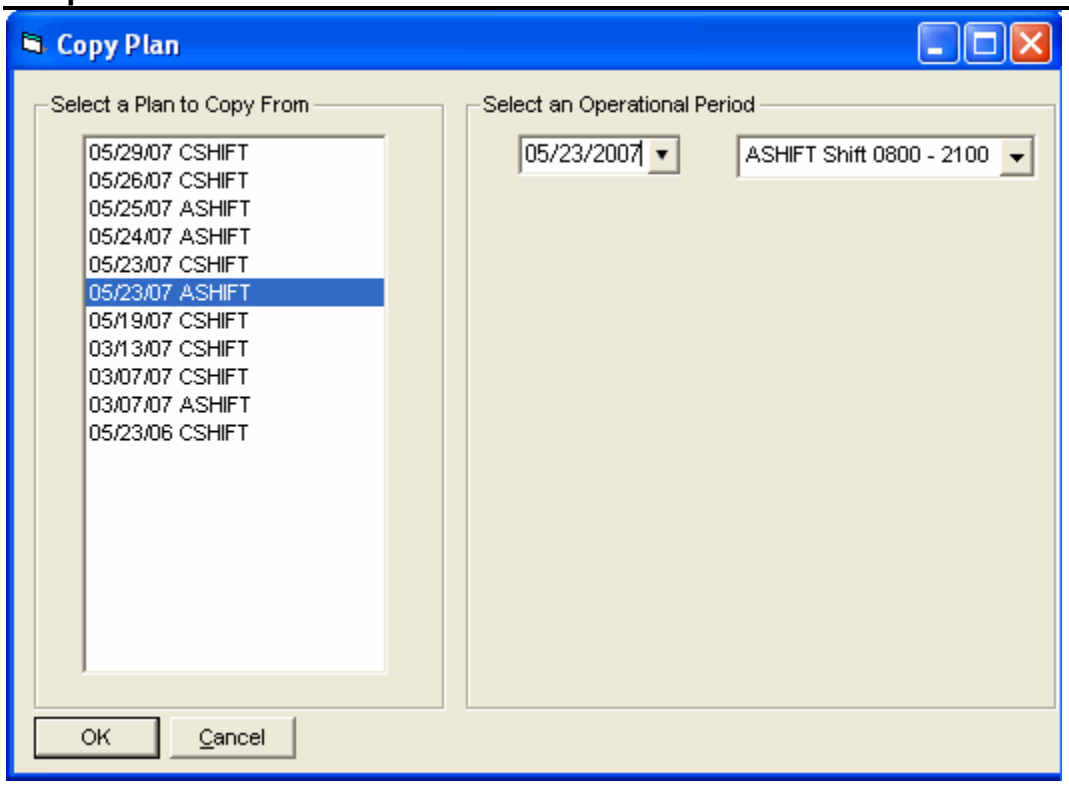
The **Operational Period** defaults to the next day. You can change this date by either typing the date or selecting it from the drop-down calendar.

5. Click the **OK** button to copy the form.

Copying a Plan

Use the **Copy Plan** option to copy an entire **Incident Action Plan**. After you copy the plan, edit the forms in the plan, as needed.

1. Click the **Manage by Plan** button to sort the **Tree View** by Plan.
6. Click the **Copy Plan** button to open the **Copy Plan** window.



3. Under **Select a Plan to Copy From**, click the plan you want to copy.
2. Under **Select an Operational Period**, select the **Date** and **Shift** to use for the **Operational Period** on the plan that is copied.

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.

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

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

7. Make the appropriate changes to the form.
6. 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**.

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

9. Repeat steps 6 - 8 for each form in the plan.

Deleting a Form

Follow these steps to delete a form:

1. In the **Tree View**, click to select the form you want to delete.
10. Click the **Delete** button in the **Main** toolbar to open the **Deleting a Form** window.
11. Click the **Yes** button to remove the form.

Working With Output

This section explains how to work with IAP output.

Previewing and Printing a Form

Follow the steps in this section to preview a form and then print it:

1. In the **Tree View**, click the form you want to preview.
2. Click the **Print Preview** button in the **Main** toolbar.
3. After you have finished viewing the form, you can print it from the **Print Preview** window by clicking the **Print** button.

Printing a Form without Previewing

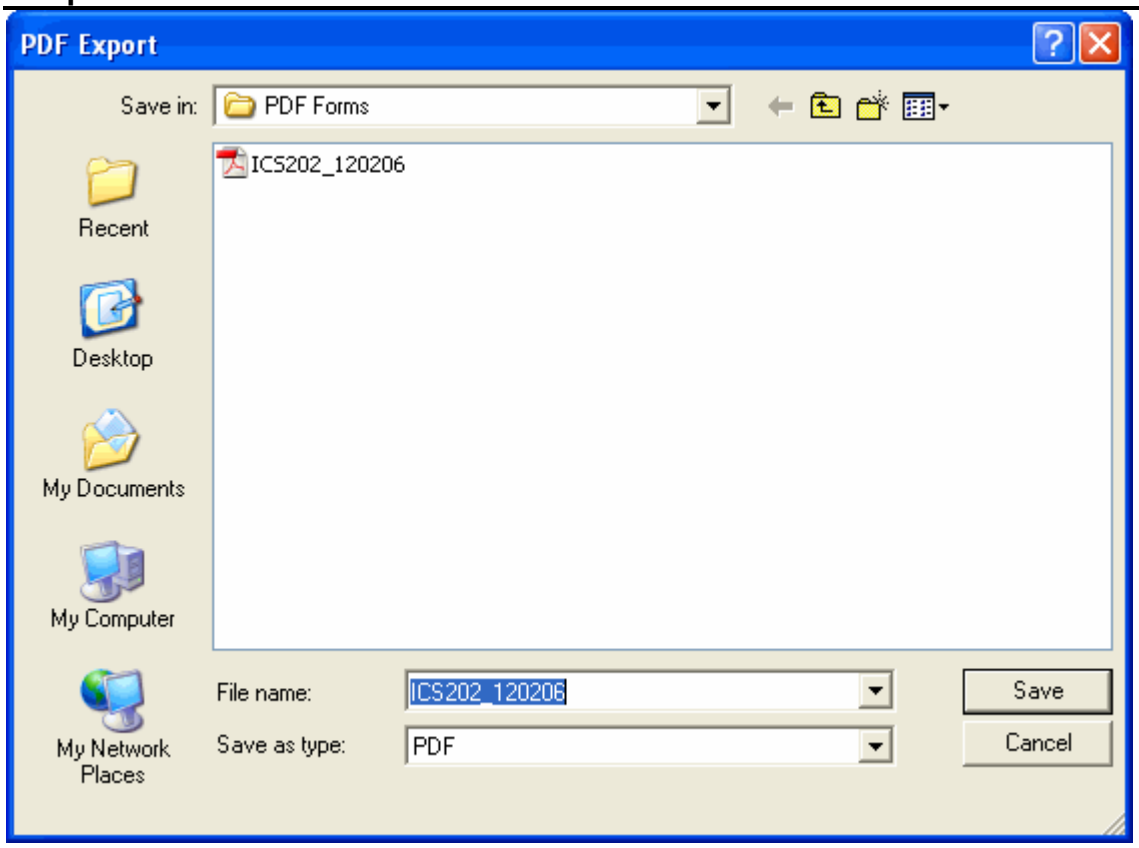
Follow the steps in this section to print a form without previewing it first:

1. In the **Tree View**, click to select the form you want to print.
4. Click the **Print** button in the Main toolbar.
5. When the **Print** window displays, select the printer where you want to send the form and click the **Print** button.

Exporting an IAP Form to a PDF File

Follow the steps in this section to export and save a form to a PDF file. You can then post the form on a web site.

1. In the **Tree View**, click to select the form you want to convert to a PDF file.
2. From the **File** drop-down menu, click the **Export** option. A **PDF Export** window displays.



3. Use the **Save In** drop-down list to browse to the area where you want to save the PDF file.

The File Name will default to the name of the report being exported.

2. Enter the **File Name** you want to assign to the PDF file.
3. Click the **Save** button to create the PDF file.

Previewing and Printing Plans

Follow the steps in this section to preview and then print an entire Incident Action Plan:

1. Click the **Manage by Plan** button to sort the **Tree View** by **Plan**.
4. Click the **Plan** you want to preview in the **Tree View**.
5. From the **File** drop-down menu, select the **Print Preview Plan** option.
6. On the **Print Preview** window, click the **Print** button.
7. When the **Print** window displays, click the **Print** button.

Printing a Plan without Previewing

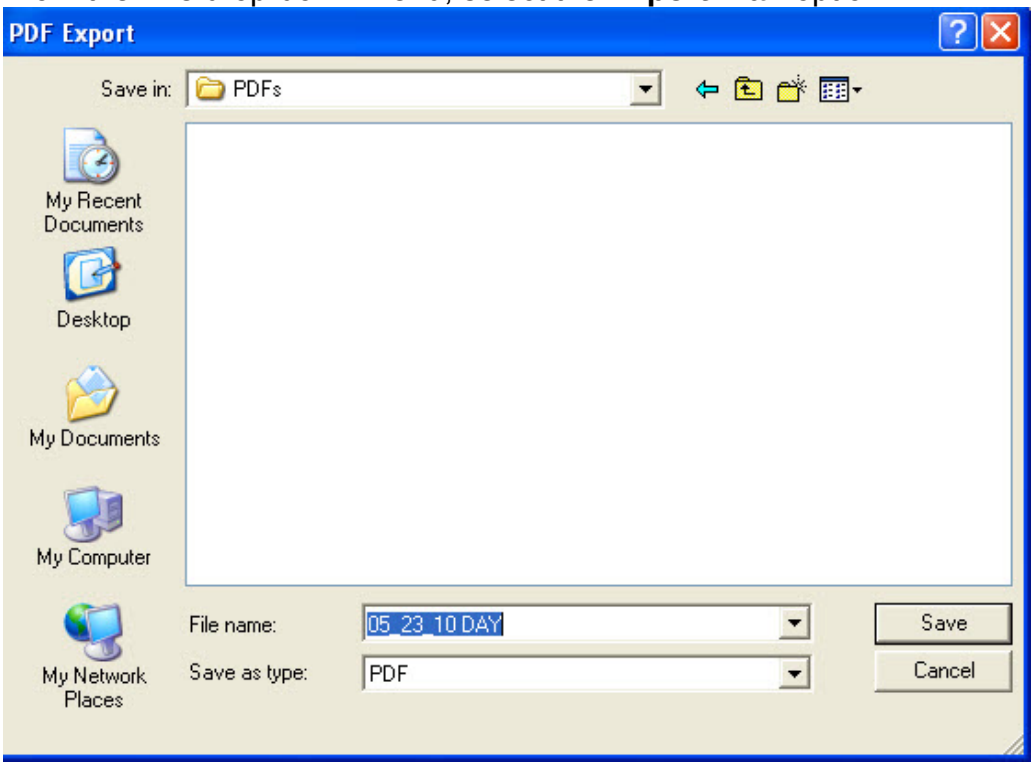
Follow the steps in this section to print an Incident Action Plan without previewing it first:

1. Click the **Manage by Plan** button to sort the information in the **Tree View** by **Plan**.
2. Click the **Plan** you want to print in the **Tree View**.
3. From the **File** drop-down menu, select the **Print Plan** option.
4. When the **Print** window displays, click the **Print** button.

Exporting Plans

Follow the steps in this section to export an entire Incident Action Plan to a 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 **PDF Export** window, browse to the folder where you want to save the PDF file.
5. In the **File Name** text box, type the name you want to assign to the PDF file. Then click the **Save** button.

The File Name will default to the name of the report being exported. The character "/ " will show as an underscore "_" in the File Name.

IAP Revision History

Revision Date	Revision Summary
2011-03-31	Revised instructions for the 11.01.00 version of I-Suite.

2010-04-27	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised instructions for the 9.01.00 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Revised instructions for the 7.01.00 release of I-Suite.
2007-01-11	Revised instructions based on changes received for Training Manuals.
2006-12-04	Revised instructions by adding more detail and graphics.
2006-06-12	Revised instructions for the 6.02 version of I-Suite.
2006-04-17	Revised instructions for the new I-Suite 2006 application.
2005-02-28	Revised instructions for the new I-Suite website and to reflect changes in procedures from the June and August 2004 I-Suite releases.
2004-11-19	Revised instructions to include items previously omitted from several lists.

Time

The **Time** section explains how to use the **Time** module to collect and track incident time for Federal, Casual (AD), and other personnel, as well as for Emergency Contracted Resources. In **Time**, you can create pay documents, the Emergency FireFighter Time Report (OF-288) and the Emergency Equipment Use Invoice (OF-286). By collecting accurate time data, you can generate meaningful management reports.

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

Information defined in **Time** is shared with other I-Suite modules, including:

- Resources
2. Demob
3. Incident Action Plan (IAP)
4. Cost
5. Supply

Topics in this guide include the following:

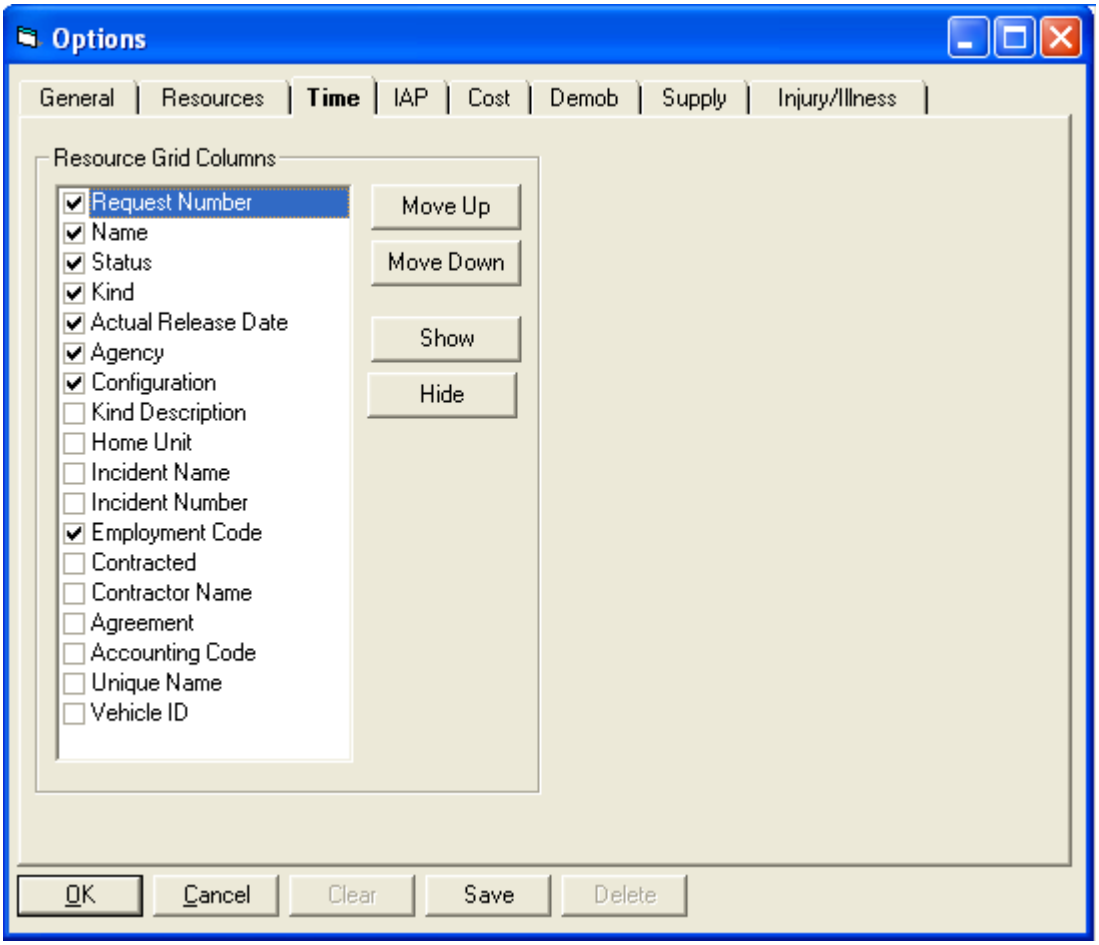
- See "Common Features"
- See "Selecting Time Options"
- See "Reviewing Common Data"
- See "Personnel Time "

- See "Crew Time"
- See "Contracted Time"
- See "Posting Time Adjustments"
- See "Printing Time Reports"
- See "Advanced Contracting"

Selecting Time Options

Follow the steps in this section to select the options to use in the **Time** area of the I-Suite system:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
- Click the **Time** tab to select it.



3. Under **Resource Grid Columns**, hold down the **Ctrl** key and click to highlight each of the columns that you want to select.
2. If you want to remove the selected columns from the **Resources** grid, click the **Hide** button.

If you want to display the selected columns on the **Resources** grid, click the **Show** button.

Each column with a checkmark in the checkbox next to it is included in the grid. When you click the **Show** button, it places a checkmark in the checkbox. When you click the **Hide** button, it removes the checkmark from the checkbox. You can also click the checkbox next to the column to either **Show** or **Hide** it.

5. To adjust the order in which the columns display on the **Time** window, click a column under **Resource Grid Columns**, then click the **Move Up** or **Move Down** button.

The order in which the columns display under **Resource Grid Columns** is the order in which they will display in the grid.

6. Click the **Save** button to save your changes. Click the **OK** button to close the Options window.

Reviewing Common Data

This section explains how to review common data when you are in the **Time** module.

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

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.

Follow the steps in this section to review common data:

Information located above the tabs (if any) in the **Manage Resource - Edit Mode** area is considered the **Common Data** for a **Resource**.

1. Click the **Time** button to open the **Time** window.
7. In the **Resources** grid, click to select the Resource you want to view.
8. Click the **Edit** button in the **Main** toolbar to open the record in the **Manage Resource - Edit Mode** area at the bottom of the window.
9. Review the following information for completeness and accuracy:

- *Request Number

2. *Account Code
3. Person - checked, if applicable
4. Contracted - checked, if applicable
5. *Resource Name

6. *Kind/Position
7. Trainee - checked, if applicable
8. *Status
9. Unit ID
10. Agency

When the **Employment Type** is **AD**, you cannot set the **Agency** to **PVT**.

- *Configuration
- Actual Release Date
- Actual Release Time

A label preceded by an asterisk (*) indicates that the information is required.

When the **Person** checkbox is checked, the **Resource Name** is replaced with **Last Name** and **First Name** and the **Time - Individual** tab displays. Either a **Last Name** or a **First Name** is required. You do not need to define both in order to save the record.

When the **Contracted** checkbox is checked, the **Time - Contracted** tab displays.

If you change the **Person** or **Contracted** selection and time was posted for the resource, a message displays indicating that the time postings will be deleted if you continue. When you select **Yes**, the system deletes all time postings. When you select **No**, the system does not change the **Person** or **Contracted** selection.

If you change the **Person** or **Contracted** selection and one or more invoices were already generated for the resource, a message displays indicating that the resource has invoiced postings. You must manually delete those postings before you can change the **Person** or **Contracted** selection.

5. To save any changes made to the information, click the **Save** button.
- To close the **Manage Resource - Edit Mode** window, click the **Close** button.

Personnel Time

Use the **Personnel Time** options to post personnel time to the system. This section includes the following information:

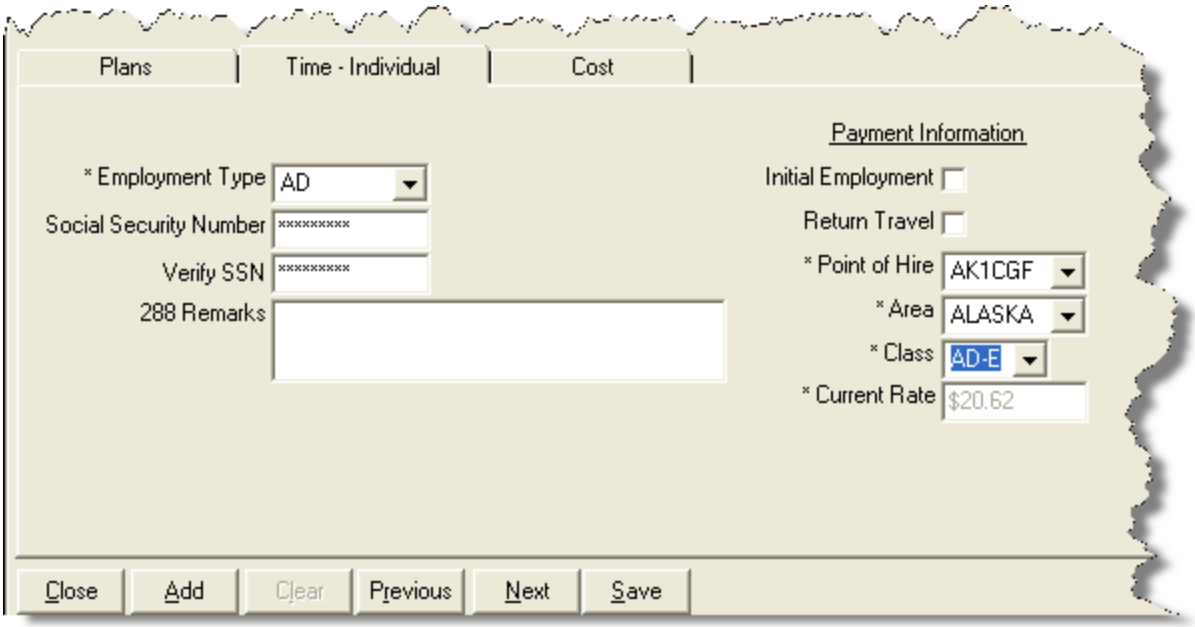
- See "Defining Personnel Information"
6. See "Posting Personnel Time"

Defining Personnel Information

This section explains how to define **Personnel** information.

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

1. Click the **Time** button to open the **Time** window.
- In the **Resources** grid, click the personnel resource to which you want to add time data.
- Click the **Edit** button in the Main toolbar at the top of the window.
- Click the **Time - Individual** tab at the bottom of the window.



- From the **Employment Type** drop-down list, select one of the following employment types:
- AD

When the **Agency** is **PVT**, you cannot set the **Employment Type** to **AD**.

- FED
- OTHER

6. If the **Employment Type** is **AD**, enter the resource's social security number in the **Social Security Number** box. For privacy reasons, the social security number displays as asterisks (*) when you type it in this box.
- To ensure that the social security number for an **AD** employee was entered correctly, enter it a second time in the **Verify SSN** box.

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

7. In the **288 Remarks** box, type any 288 remarks.
7. If the **AD** employment type is selected, define the following information in the **Payment Information** section:

- If this is the initial employment for the personnel resource, click to check the **Initial Employment** checkbox.

8. If there will be return travel, click to check the **Return Travel** checkbox.
9. From the **Point of Hire** drop-down list, select the appropriate point of hire.
10. From the **Area** drop down-list, select the appropriate area.
11. From the **Class** drop-down list, select the appropriate class.

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

- If **FED** is selected as the **Employment Type**, this is the only required information.
- In the **Personnel Mailing Address** area, define the following information:
- Address 1

10. Address 2
11. City
12. State
13. Zip
14. Phone
15. Fax

If a **Fax** number for **FED** or **OTHER** is defined, it is available for the Personnel Time Report (Print/Fax).

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

Posting Personnel Time

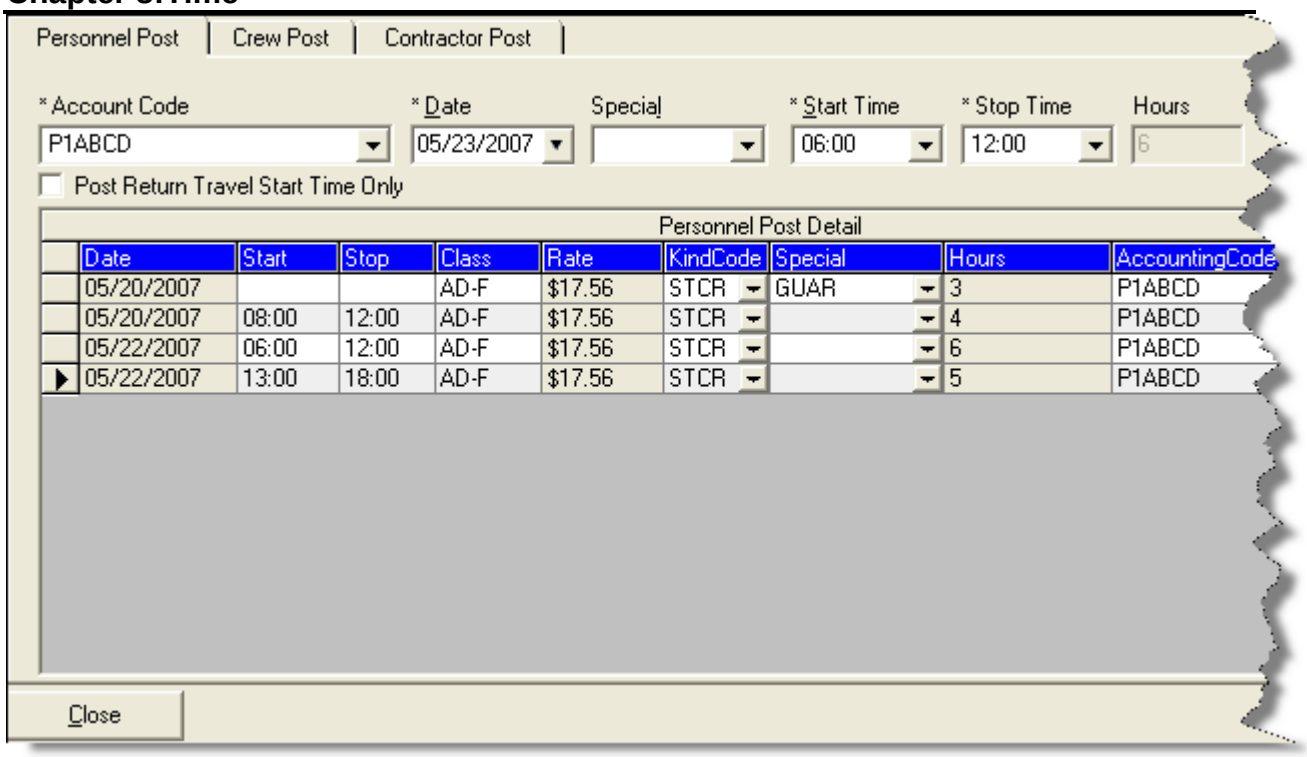
Follow the steps in this section to **Post Personnel Time**:

The date automatically changes for posting time that extends beyond midnight. If users post overlapping hours, they must first verify before proceeding.

Posted time is locked to an established employment code.

1. Click the **Time** button to open the **Time** window.

13. In the **Resources** grid, click the **Personnel Resource** to which you are posting time.
14. On the **Time Toolbar**, click the **Post Time** button. A **Personnel Post** tab displays at the bottom of the window.



5. From the **Account Code** drop-down list, select the appropriate account code.

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.

When you select an accounting code from the drop-down list that is not the default, that accounting code remains selected until you select another resource or accounting code.

6. In the **Date** box, either type the date for the time entry or select it from the drop-down calendar.
6. If a special circumstance applies (e.g. Environmental Pay, Travel, Day Off, etc.), select the appropriate code from the **Special** drop-down list.

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.

If you assign the **GUAR**, **COP**, or **DAY OFF** special codes to a resource 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 when the individual started working.
7. In the **Stop Time** box, either type the time or select it from the drop-down list to identify when the individual stopped working.
8. Click the **Save** button to commit the posting.

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.

11. Click the **Close** button to close the **Personnel Post** tab.

Reposting Personnel Time

Follow the steps in this section to repost a day's time with different hours:

1. Click the **Time** button to open the **Time** window.
12. In the **Resources** grid, click the **Personnel Resource** for which you are reposting the time.
13. Click the **Post Time** button to open the **Personnel Post** area at the bottom of the window.
14. Fom the **Account Code** drop-down list, select the appropriate account code.
15. In the **Date** box, either type the date or select it from the drop-down calendar.
16. If a special circumstance applies (e.g. Environmental Pay, Travel, Day Off, etc.), select the appropriate code from the **Special** drop-down list.
17. In the **Start Time** box, either type the time or select it from the drop-down list to identify when the individual started working.
18. In the **Stop Time** box, either type the time or select it from the drop-down list to identify when the individual stopped working.
19. Click the **Save** button to commit the posting. An **Overlapping Hours** window displays.
20. Click the **Yes** button to repost the new hours to that day.
21. Click the **Close** button to close the **Personnel Post** tab.

Editing Posted Personnel Time

Follow the steps in this section to edit time that was posted to the system:

1. Click the **Time** button to open the **Time** window.
2. In the **Resources** grid, click the **Personnel Resource** with the posted time that you want to edit.
3. Click the **Post Time** button to open the **Personnel Post** area at the bottom of the window.

4. Make the appropriate changes to the information in the **Personnel Post Detail** area. You can change the **Start**, **Stop**, **Class**, **KindCode**, **Special**, and **AccountingCode** information.

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. Click the **Close** button after you make your changes. The application automatically saves your changes when you close the **Personnel Post** tab.

For edited entries to save, you must click outside of the row being edited. When the pencil image in the selector column changes from a pencil to an arrow, the changes were saved.

Deleting Posted Personnel Time

Follow the steps in this section to delete time that was posted to the system for a day:

1. Click the **Time** button to open the **Time** window.
6. In the **Resources** grid, click the **Personnel Resource** with the posted time that you want to delete.
7. Click the **Post Time** button to open the **Personnel Post** area at the bottom of the window.
8. In the **Personnel Post Detail** grid, click anywhere in the row that you want to delete.
9. Click the **Delete** button to remove the posted time.
10. When the **Delete Posting** window displays, Click the **Yes** button to delete the posting.

Changing the KindCode and Rate (One Time Change Only)

Follow the steps in this section to change the kind code and rate:

1. Click the **Time** button to open the **Time** window.
2. Click the **Post Time** button to open the **Posting** area at the bottom of the window.
3. In the **Resources** grid, click the **Personnel Resource** you want to edit.
4. In the **Personnel Post Detail** grid, locate the row that contains the kind code and rate you want to change.
5. From the **KindCode** drop-down list, select the new code.
6. To change the **Rate**, click in the **Rate** box. Then enter the appropriate rate.
7. To close the **Personnel Post** tab, click the **Close** button.

Refer to **Resources** for specific instructions on changing the **KindCode / Rate** so that all subsequent postings will use the new **KindCode / Rate**.

Posting Personnel Return Travel Time

Follow the steps in this section to post **Return Travel** time:

1. Click the **Time** button to open the **Time** window.
2. Click the **Post Time** button to display the **Posting** area at the bottom of the window.
3. In the **Resources** grid, click the **Resource** for which you are posting travel time.
4. Click to check the **Post Return Travel Start Time Only** checkbox. The system automatically inserts the code **TVL** in the **Special** box.

When the **Post Return Travel Start Time Only** checkbox is checked, the number of hours is automatically set to **0** (Zero).

If you want to define hours for the Return Travel, do NOT check the **Post Return Travel Start Time Only** checkbox. Instead, select the **TVL** code from the **Special** drop-down list. Then define a **Start Time** and a **Stop Time**.

5. In the **Date** box, either type the date for the travel time or select it from the drop-down calendar.
2. In the **Start Time** box, either type the time or select it from the drop-down list to identify when the person started traveling.
3. If appropriate, enter the time in the **Stop Time** box.

The **Stop Time** is required if you selected the **TVL** code from the **Special** drop-down list and did NOT check the **Post Return Travel Start Time Only** checkbox.

The **Stop Time** is not required if you checked the **Post Return Travel Start Time Only** checkbox.

8. Click the **Save** button to commit the posting.
6. Click the **Close** button to close the **Personnel Post** tab.

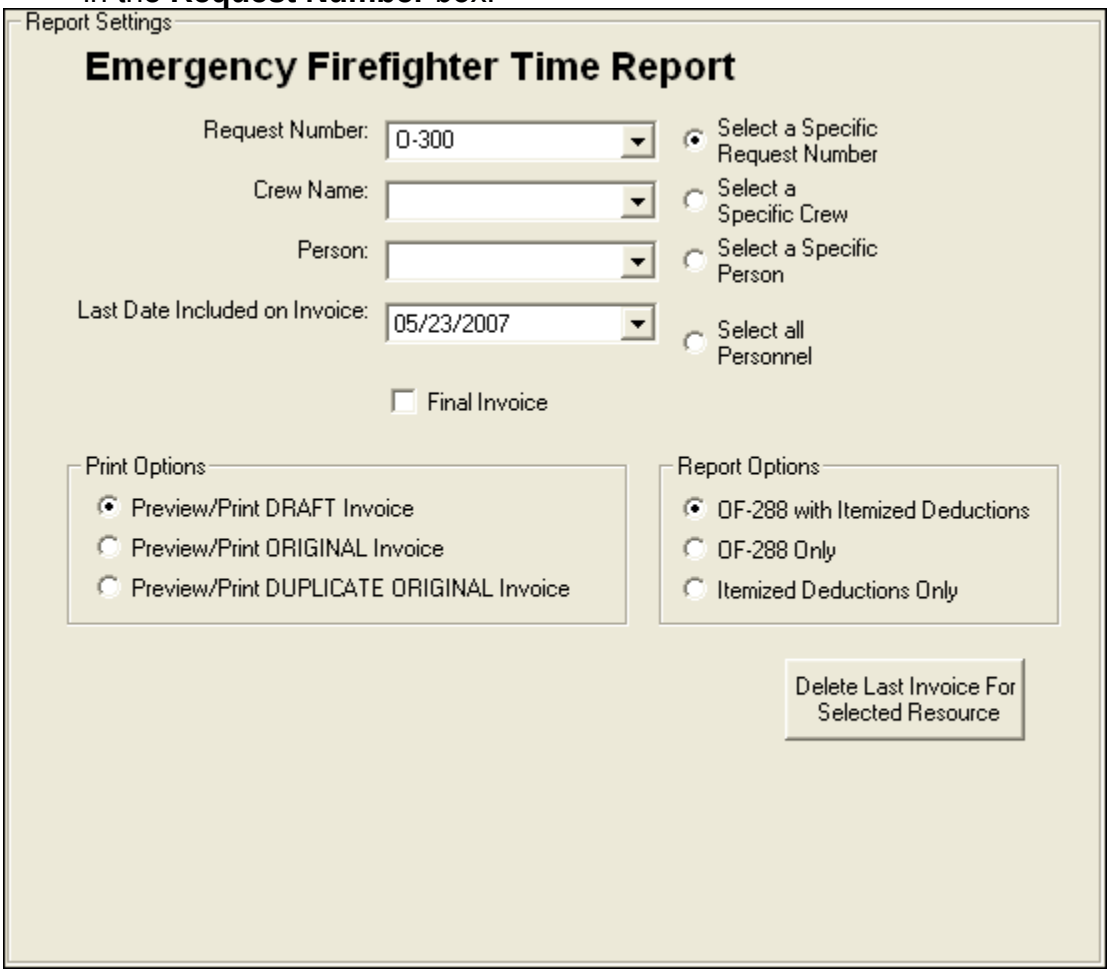
Printing an Emergency Fire Fighter Time Report (OF 288)

This report is the standard timekeeping record and payment document for FED and casual (AD) personnel involved in the fire fighting incident. Follow the steps in this section to print an **Emergency Fire Fighter Time Report (OF 288)**:

An **Original OF-288** will not print for an **AD** employee who does not have a **Social Security Number** defined.

1. Click the **Time** button to open the **Time** window.
9. In the **Resources** grid, click the **Resource** for which you want to print the Emergency Fire Fighter Time Report (OF 288).

10. Click the **Print Invoice** button to open the **Emergency Firefighter Time Report** window. Notice that the **Request Number** for the resource you selected displays in the **Request Number** box.



4. To print the invoice for a resource other than the one selected in the **Resources** grid, click one of the following options:

- **Select a Specific Request Number** - Select the number from the **Request Number** drop-down list.

5. **Select a Specific Crew** option - Select the crew from the **Crew Name** drop-down list.
6. **Select a Specific Person** - Select the name from the **Person** drop-down list.
7. **Select all Personnel** - No other information needs to be defined.
4. The **Last Date Included on Invoice** box contains the last date an invoice was posted for the resource. If needed, you can change this date by either typing a new date or selecting it from the drop-down calendar.

- If this is the final OF 288 for a resource leaving the incident, click to check the **Final Invoice** checkbox. If not, leave this checkbox blank.

7. In the **Print Options** frame, click one of the following options to identify the type of invoice to create:

The Social Security Number only prints when the **Preview/Print ORIGINAL Invoice** option is selected.

- **Preview/Print DRAFT Invoice** - Generates a Draft Invoice. Review this invoice, before printing an Original copy. The word Draft prints on this invoice.

8. **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.
9. **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.
8. When generating a **Draft** invoice, click to select one of the following **Report Options**:

- OF-288 with Itemized Deductions

9. OF-288 Only
10. Itemized Deductions Only

When you are printing an **Original Invoice** or a **Duplicate Original Invoice**, only the **OF-288 with Itemized Deductions** option is available.

9. To preview and then print the report, click the **Preview** button, and then click the **Print Report** button.

   To print the report without previewing, click the **Print** button.

If there are missing days of posted time when printing or previewing an OF-288, a warning message now displays. Click **OK** to continue with the **Print** or **Preview** process. Click the **Cancel** button to cancel the **Print** or **Preview** process.

10. To delete the last invoice for the selected resource, click the **Delete Last Invoice for Selected Resource** button. Two different warning messages display. Click the **Yes** button on each window to delete the invoice.

If the last invoice for an AD resource was included in a Financial Export, you cannot delete the invoice.

Crew Time

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. Examples of crews include hand crews, engine crew members, and contract pickup with an AD driver.

Types of crews include the following:

- Hand crew

11. Engine members paid on an OF 288

12. Driver attached to a vehicle
13. Faller attached to a chainsaw or vehicle
14. Helitack Crew

The same rules apply for entering crews as for entering personnel:

- Add crew and member data in **Resources**.
- Edit crew and member data and enter additional crew and member data in **Time**.

The two levels within a crew are the crew itself and the crew members or operators.

This section contains the following information:

- See "Creating a Crew"
- See "Editing Crew Information"
- See "Crew Roster"
- See "Posting Crew Time"

Creating a Crew

Crews are built by attaching or rostering members to a Kind of Resource. Follow the steps in this section to create a crew:

When crew and crew member data is not being entered by **Resources** users, **Time** users must enter and manage all crew and crew member data.

1. Click the **Time** button to open the **Time** window.
- On the **Toolbar**, click the **Add** button. A **Manage Resource - Add Mode** area displays at the bottom of the window.
- In the **Manage Resource – Add Mode** area define the following:
- *Request Number
2. *Account Code
3. Person - checked, if applicable
4. Contracted - checked, if applicable
5. *Resource Name, or *Last Name and *First Name (for a person)
6. *Kind/Position

Make sure you select a Crew code from the Kind/Position drop-down list. This identifies the resource as being a crew.

- Trainee - checked, if applicable
- *Status
- Unit ID

- Agency
- *Configuration
- Actual Release Date
- Actual Release Time

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

Adding Crew Members to the Crew

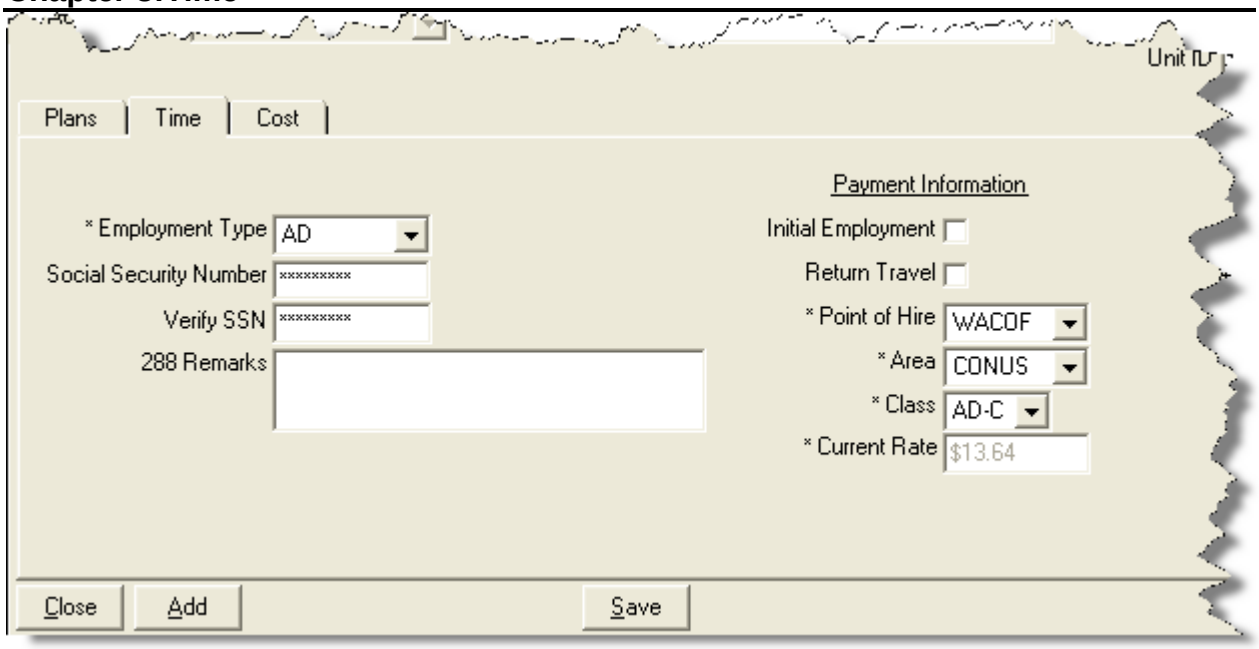
After you have defined the new crew resource, follow these steps to add members to the crew:

In some cases, a crew leader will show up on the crew, but the user must add the remaining crew members.

1. In the **Resources** grid, click to select the **Crew** in which you want to add the crew members.
5. On the **Toolbar**, click the **Edit** button. The **Manage Resource - Edit Mode** window displays.
6. Click the **Roster** button. The **Roster Resource - Add Mode** window displays.
7. Define the following personnel data as required or appropriate:

- *Request Number

2. *Last Name
3. *First Name
4. *Kind/Position
5. If the crew member is a trainee, click to check the **Trainee** checkbox.
6. *Status
7. Agency
8. Actual Release Date
9. Actual Release Time
10. To designate the resource as the crew leader, click to select the **Leader** check box.
5. Move to the **Time** tab at the bottom of the window:



6. From the **Employment Type** drop-down list, select one of the following employment types:

- AD
7. FED
8. OTHER

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** box. For privacy reasons, the social security number displays as asterisks (*) when you type it in this box.

- To ensure that the social security number for an **AD** employee was entered correctly, enter it a second time in the **Verify SSN** box.

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

9. Enter any applicable comments in the **288 Remarks** field.
8. If **AD** is selected as the **Employment Type**, define the following **Payment Information**:

- If this is an initial employment, click to check the **Initial Employment** check box.
10. If return travel is needed, click to check the **Return Travel** checkbox.
11. From the **Point of Hire** drop-down list, select the appropriate **point of hire**.
12. From the **Area** drop-down list, select the appropriate **Area**.
13. From the **Class** drop-down list, select the appropriate **Class**.

10. If **OTHER** is selected as the **Employment Type**, define the appropriate **Current Rate**.

- If **FED** is selected as the **Employment Type**, no other information is required.
- Under **Personnel Mailing Address**, define the following personnel data:
- Address 1

11. Address 2
12. City
13. State
14. Zip
15. Phone
16. Fax

If a **Fax** number for **FED** or **OTHER** is defined, it is available for the Personnel Time Report (Print/Fax).

13. To add the address in a selected crew member record to all crew members without an address, click the **Propagate Address** button.

To clear an address in a crew member record, click the **Clear Address** button.

14. To save your changes, click the **Save** button.
14. To add additional crew members, repeat the steps in this section.

Editing Crew Information

Follow the steps in this section to edit crew information.

Editing the Actual Crew Information

Follow these steps to edit information for the actual crew itself:

1. Click the **Time** button to open the **Time** window.
15. In the **Resources** grid, click the **Crew** you want to edit.
16. On the **Toolbar**, click the **Edit** button to display the **Manage Resource - Edit Mode** area at the bottom of the window.
17. Make the appropriate changes to the information that displays in **Manage Resource - Edit Mode** area.
18. To save your changes, click the **Save** button.

Editing Crew Member Information

Follow these steps to edit the information for crew members that were rostered to the crew:

1. Click the **Time** button to open the **Time** window.
2. In the **Resources** grid, click to select the plus sign (+) to the left of the **Crew** that contains the member you want to edit.
3. Click to select the **Crew Member** you want to edit.
4. On the **Toolbar**, click the **Edit** button to display the **Roster Resource - Edit Mode** area at the bottom of the window.
5. Make the appropriate changes to the information that displays in the **Roster Resource - Edit Mode** area.
6. To save your changes, click the **Save** button.
2. If you need to edit the information for other crew members, click their name in the **Resources** grid at the top of the window. Then repeat steps 5-6.
3. When you have finished making changes to the crew member information, click the **Close** button to close the **Roster Resource** area.

Posting Crew Time

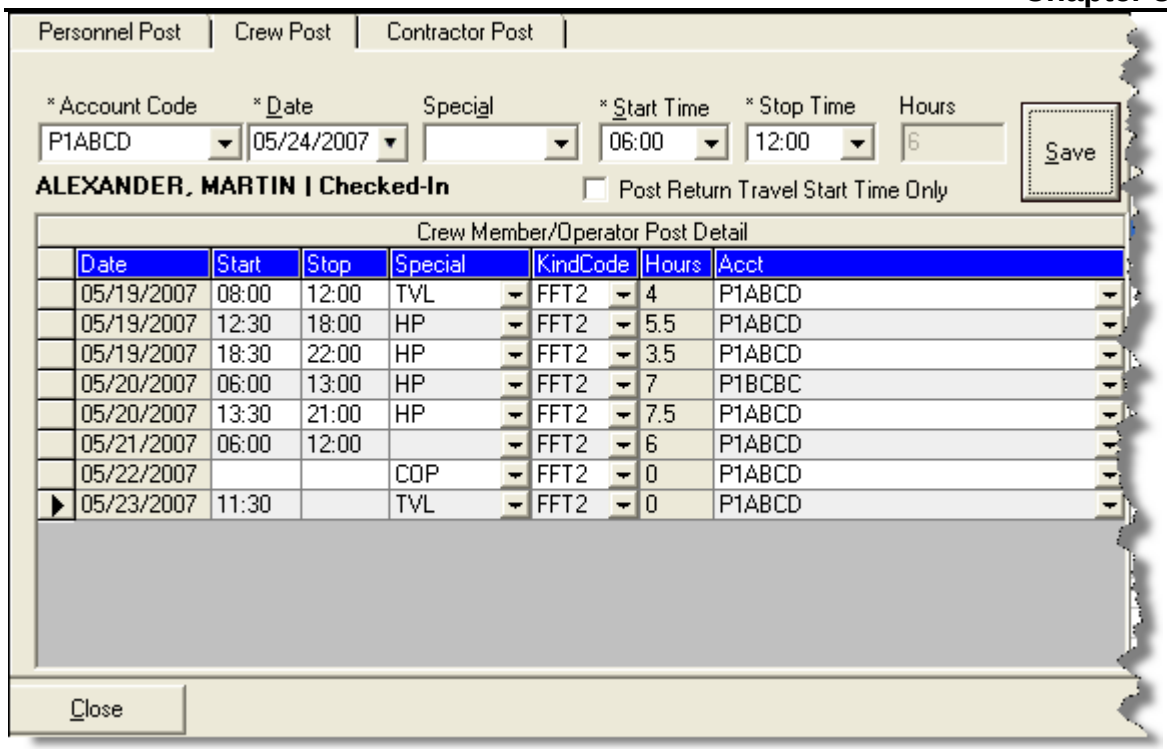
Follow the steps in this section to post crew time:

Posting Time to All Crew Members

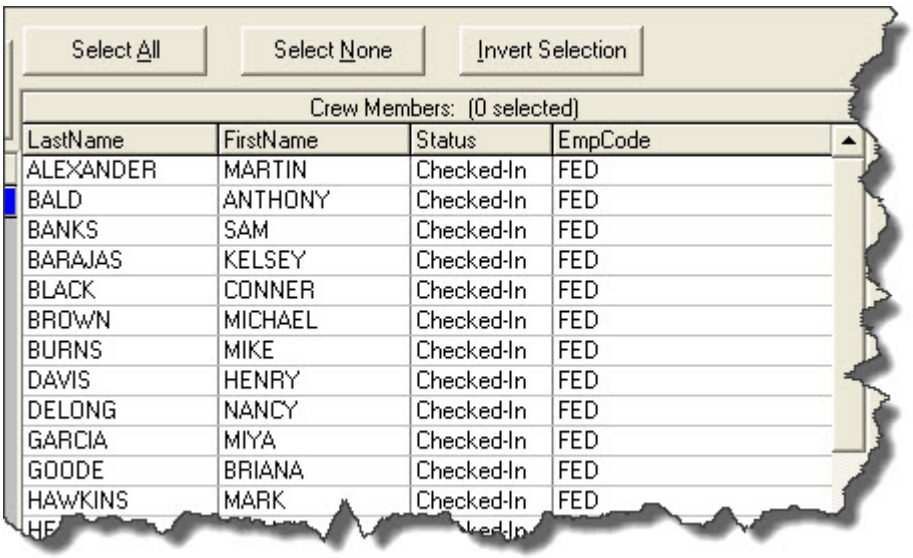
Follow the steps in this section to use the **Select All** option to post time to all crew members at the same time:

1. Click the **Time** button to open the **Time** window.
7. In the **Resources** grid, click the crew for which you are posting time.
8. Click the **Post Time** button to open the **Crew Post** tab at the bottom of the window.

   There are two areas that display on the Crew Post tab. The area on the left is where you enter the posting information:



The area on the right contains a list of crew members to which you can post time:



4. Click the **Select All** button. Notice that all of the crew members are now selected.

If all of the crew members are selected and you want to unselect them, click the **Select None** button.

Click the **Invert Select** button to invert the crew members that are selected. This means that those members that were selected are now unselected and those who were not selected are now selected.

5. From the **Account Code** drop-down list, select the appropriate account code.

When you select an accounting code from the drop-down list that is not the default, that accounting code remains selected until you select another resource or accounting code.

6. In the **Date** box, either type the posting date or select it from the drop-down calendar.
6. If you want to assign a special code (i.e. Travel, Day Off, etc.) to the time posting, select the code from the **Special** drop-down list.

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.

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 beginning time for all of the crew members or select it from the drop-down list.
7. In the **Stop Time** box, either type the ending time for all of the crew members or select it from the drop-down list.
8. Click the **Save** button to post the time. A **Crew Post Results** window displays. This window identifies each of the crew members to which the time was posted and whether the posting was successful.
9. Click the **OK** button to close the **Crew Post Results** window.
10. Click the **Close** button to close the **Posting** area on the **Time** window.

Posting Time to a Single Crew Member

Follow these steps to post time to a single crew member:

1. Click the **Time** button to open the **Time** window.
9. In the **Resources** grid, click the crew for which you are posting time.
10. Click the **Post Time** button to open the **Crew Post** tab at the bottom of the window.
11. Under **Crew Members** on the right side of the window, click the crew member for which you want to post time.
12. From the **Account Code** drop-down list, select the appropriate account code.

When you select an accounting code from the drop-down list that is not the default, that accounting code remains selected until you select another resource or accounting code.

6. In the **Date** box, either type the posting date or select it from the drop-down calendar.
2. If you want to assign a special code (i.e. Travel, Day Off, etc.) to the time posting, select the code from the **Special** drop-down list.
3. In the **Start Time** box, either type the beginning work time for the selected crew member or select it from the drop-down list.
4. In the **Stop Time** box, either type the ending work time for the selected crew member or select it from the drop-down list.
5. Click the **Save** button to post the time. A **Crew Post Results** window displays. This window identifies the crew member to which the time was posted and whether it was successful.
6. Click the **OK** button to close the window.
7. Click the **Close** button to close the **Crew Post** tab.

Reposting Crew Time

Follow the steps in this section to repost crew time for a day:

1. Click the **Time** button to open the **Time** window.
7. In the **Resources** grid, click the crew for which you are reposting time.
8. Click the **Post Time** button to open the **Crew Post** tab at the bottom of the window.
9. Under **Crew Members**, click the crew member(s) for which you are reposting time.
10. Under **Crew Member/Operator Post Detail**, find the day for which you are reposting time.
11. In the **Date** box, either type the appropriate date or select it from the drop-down calendar. This should be the same date that was listed in the **Detail** grid.
12. If you want to assign a special code (i.e. Travel, Day Off, etc.) to the time posting, select the code from the **Special** drop-down list.
13. In the **Start Time** box, either type the beginning time for the selected crew member(s) or select it from the drop-down list.
14. In the **Stop Time** box, either type the ending time for the selected crew member(s) or select it from the drop-down list.
15. Click the **Save** button to repost the time. An **Overlapping Hours** window displays.
16. Click the **Yes** button to repost the hours to that day.
17. Click the **Close** button to close the **Crew Post** tab.

Deleting Posted Crew Time

Follow the steps in this section to delete time that was posted for crew members:

1. Click the **Time** button to open the **Time** window.

2. In the **Resources** grid, click the crew with the posted time you want to delete.
3. Click the **Post Time** button to open the **Crew Post** tab at the bottom of the window.
4. Under **Crew Member/Operator Post Detail**, click anywhere in the row that contains the posted time you want to delete.
5. Click the **Delete** button in the **Main** toolbar.
6. When the **Delete Posting** window displays, Click the **Yes** button to delete the posted time for the crew member(s).

Copying Posted Crew Time

Follow the steps in this section to copy posted time from one crew member to another:

You cannot use the Copy/Paste functionality for the special postings time postings, GUAR, COP or DAY OFF.

1. Click the **Time** button to open the **Time** window.
2. In the **Resources** grid, click the crew for which you are posting time.
3. Click the **Post Time** button to open the **Crew Post** area at the bottom of the window.
4. Under **Crew Members**, click the crew member with the posted time you want to copy.
5. Under **Crew Member/Operator Post Detail**, click the row with the posted time you want to copy.
6. Right click your mouse button over the selected row. Then click the **Copy Selected Postings** option in the menu that displays.
7. Under **Crew Members**, click the member to which you are copying the time posting.
8. Right click your mouse button over the selected row. Then click the **Paste Selected Postings** option. The **Crew Post Results** window displays.
9. Click the **OK** button to close the window.
10. Click the **Close** button to close the **Crew Post** tab.

Posting Return Travel Time for Crews

Follow the steps in this section to **Post Return Travel Time** for **Crew Members**:

1. Click the **Time** button to open the **Time** window.
2. In the **Resources** grid, click the crew for which you are posting return travel time.
3. Click the **Post Time** button to open the **Crew Post** tab at the bottom of the window.
4. Under **Crew Members,** click the crew member(s) for which you are posting return travel time.

5. Click to check the **Post Return Travel Start Time Only** option. The system automatically inserts the code **TVL** in the **Special** box.

When the **Post Return Travel Start Time Only** checkbox is checked, the number of hours is automatically set to **0** (Zero).

If you want to define hours for the Return Travel, do NOT check the **Post Return Travel Start Time Only** checkbox. Instead, select the **TVL** code from the **Special** drop-down list. Then define a **Start Time** and a **Stop Time**.

6. In the **Date** box, either type the appropriate date or select it from the drop-down calendar.
2. In the **Start Time** box, either type the time when the crew member(s) started traveling or select it from the drop-down list.
3. If appropriate, enter time in the **Stop Time** box.

The **Stop Time** is required if you selected the **TVL** code from the **Special** drop-down list and did NOT check the **Post Return Travel Start Time Only** checkbox.

The **Stop Time** is not required if you checked the **Post Return Travel Start Time Only** checkbox.

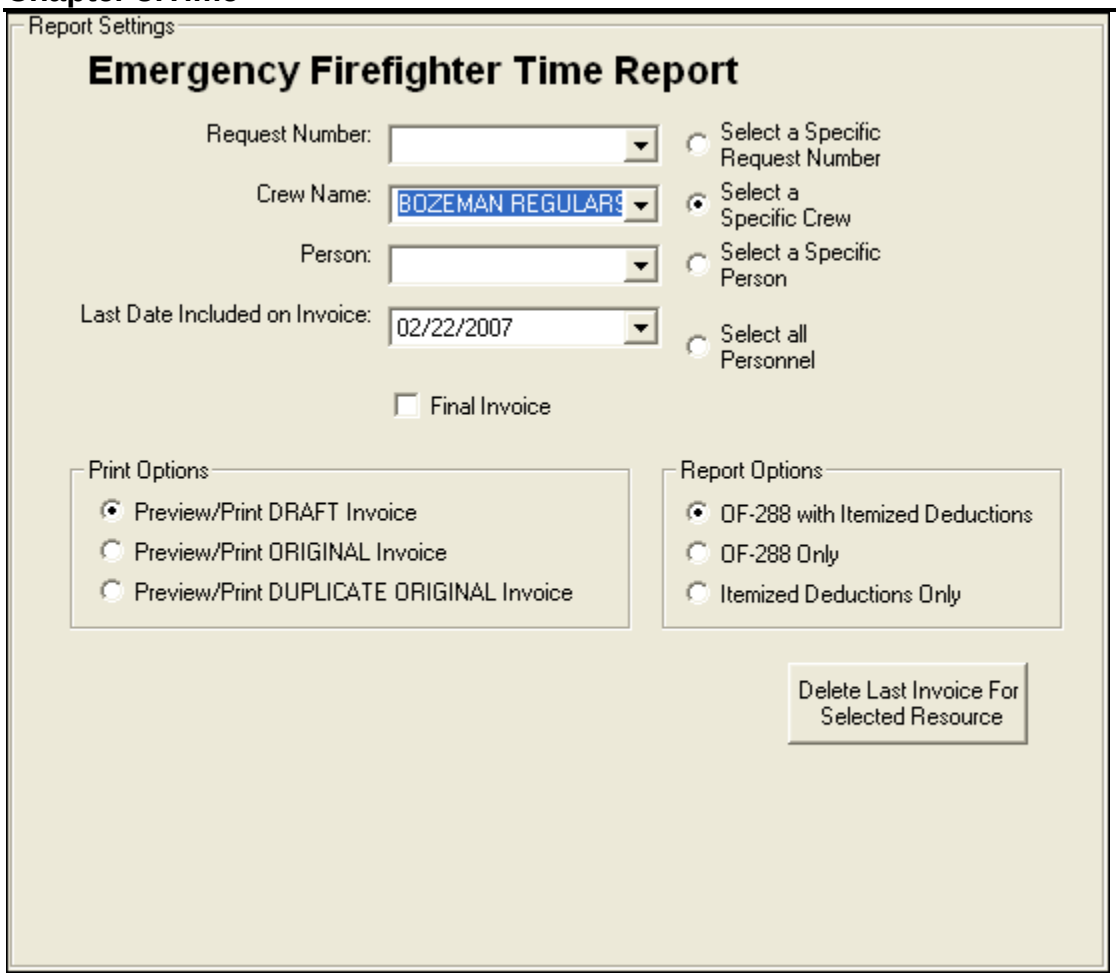
9. Click the **Save** button to commit the posting.
7. Click the **Close** button to close the **Crew Post** tab.

Printing Emergency Fire Fighter Time Report for Crews

Follow the steps in this section to print an Emergency Fire Fighter Time Report (OF 288) for crew members:

A separate OF-288 is generated for each crew member. You can preview and print each OF-288 as needed.

1. Click the **Time** button to open the **Time** window.
10. In the **Resources** grid, click the crew for which you want to print the Emergency Fire Fighter Time Report (OF 288).
11. Click the **Print Invoice** button. The **Select Report** window displays with the **OF-288** report selected on the **Time** tab. Notice that the name of the crew you selected automatically displays in the **Crew Name** box.



4. To print the invoice for a resource other than the one selected in the **Resources** grid, click one of the following options:

- **Select a Specific Request Number** - Select the number from the **Request Number** drop-down list.

5. **Select a Specific Crew** - Select the crew from the **Crew Name** drop-down list.
6. **Select a Specific Person** - Select the name from the **Person** drop-down list.
7. **Select all Personnel** - No other information needs to be defined.
5. The **Last Date Included on Invoice** box contains the last date an invoice was posted for the resource. If needed, you can change this date by either typing a new date or selecting it from the drop-down calendar.

- To create the final OF 288 for a resource leaving the incident, click to check the **Final Invoice** checkbox.
- In the **Print Options** frame, click one of the following options to identify the type of invoice to create:

The social security number will only print when the **Preview/Print ORIGINAL Invoice** option is selected.

- **Preview/Print DRAFT Invoice** - Generates a Draft Invoice. Review this invoice, before printing an Original copy. The word Draft prints on this invoice.

6. **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.
7. **Preview/Print DUPLICATE ORIGINAL Invoice** - When the parent crew resource is selected, this option generates a copy of the last Original Invoice printed for each crew member.

   When an individual crew member is selected, a list of invoices that can be reprinted for the crew member displays.
8. When generating a **Draft** invoice, click to select one of the following **Report Options**:

- OF-288 with Itemized Deductions

9. OF-288 Only
10. Itemized Deductions Only

When you are printing an **Original Invoice** or a **Duplicate Original Invoice**, only the **OF-288 with Itemized Deductions** option is available

9. To preview and then print the report, click the **Preview** button, and then click the **Print Report** button.

   To print the report without previewing, click the **Print** button, and then click the **Print** button on the **Print** window.

If there are missing days of posted time when printing or previewing an **OF-288**, a warning message now displays. Click the **OK** button to continue with the **Print** or **Preview** process. Click the **Cancel** button to cancel the **Print** or **Preview** process.

10. To delete the last invoice for the selected resource, click the **Delete Last Invoice for Selected Resource** button. Two different warning messages display. Click the **Yes** button on each window to delete the invoice.

Contracted Time

Use the **Contracted Time** options to post contracted resource time to the system. This section includes the following information:

- See "Defining Contracted Resources"

11. See "Adding Operators to a Contracted Resource"
12. See "Posting Contracted Time"

Defining Contracted Resources

Follow the steps in this section to define contracted resources.

Relationships between contractors, agreements, and resources

The following are important terms to understand when working with contractors:

- **Contractor** – a business entity that has available resources.
- **Agreement** – an OF-294 that is attached to the Contractor. A single contractor may have many agreements.
- **Specifications** – conditions that the Resource (Contractor) must meet to fulfill the agreement.

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.

Reviewing or Editing Common Data

Follow these steps to review or edit common data before you define the Contracted Information:

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.

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.

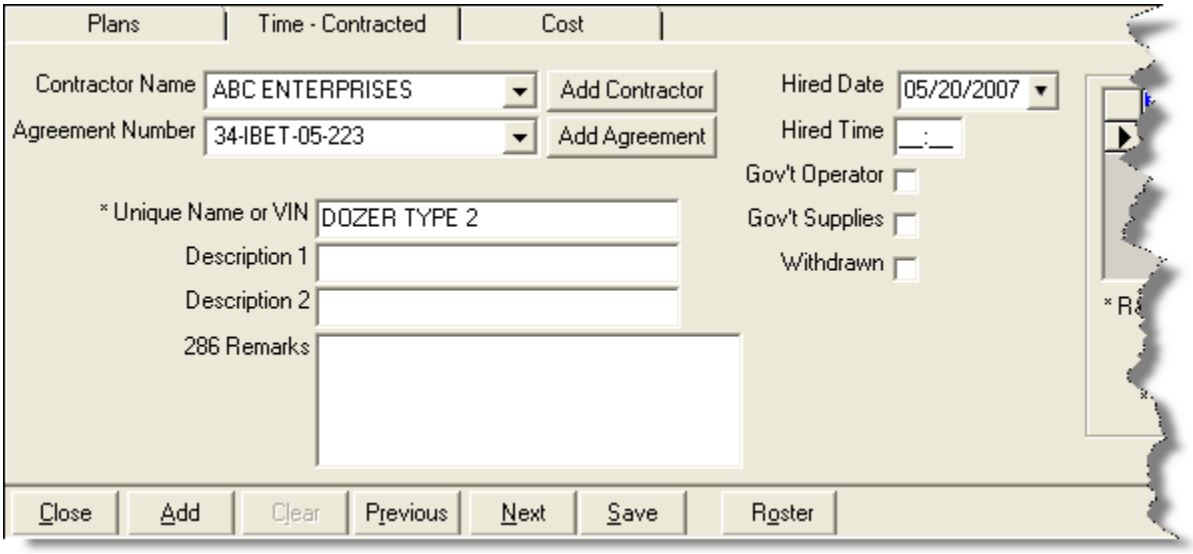
1. Click the **Time** button to open the **Time** window.

- In the **Resources** grid, click the Resource you want to view or edit.
- Click the **Edit** button in the toolbar at the top of the window.
- Make any needed changes to the **Common Data**.
- Click the **Save** button to save your changes.

Defining Time Contracted

Follow the steps in this section to define the **Time Contracted** information for a contracted resource:

1. In the **Resource** grid, click the resource to which you are adding Time Contracted information.
2. Click the **Edit** button.
3. Click the **Time – Contracted** tab at the bottom of the **Manage Resource** area to select it.



4. From the **Contractor Name** drop-down list, select the appropriate **Contractor Name**.

   If the contractor is not listed in the **Contractor Name** drop-down list, follow these steps to add the contractor to the system:

a. Click the **Add Contractor** button to open the **Add Contractor** window.
5. Enter the contractor's **Name**.
6. Enter the contractor's **TIN** (Tax Identification Number). For privacy reasons, the TIN displays as asterisks (*) when you type it in this box.
7. To ensure that the TIN was entered correctly, enter it a second time in the **Verify TIN** box.
8. Enter the contractor's **DUNS** (D&B DUNS Number).
9. Enter the contractor's **Address**, **City**, **State**, and **Zip**.
10. Enter the contractor's **Phone**.
11. Click the **Save** button to save the **Contractor** to the system.
12. Click the **Close Contracts** button at the top of the window to return to the **Time - Contracted** tab.
5. From the **Agreement Number** drop-down list, select the appropriate agreement number.

   If the agreement number is not listed in the **Agreement Number** drop-down list, follow these steps to add the agreement to the system:

a. Click the **Add Agreement** button to open the **Agreement** window.
6. Enter the appropriate **Agreement Number**.
7. Enter the **Beginning Date** for the agreement.

8. Enter the **Expiration Date** for the agreement.
9. Enter the **Point of Hire** for the contractor.
10. From the **Administrative Office for Payment** drop-down list, select the appropriate office.

    If the office is not listed in the **Administrative Office for Payment** drop-down list, click the **Add New Administrative Office for Payment** button. Then define the office's name and address information in the window that displays. Click the **Save** button to save the information, then click the **Close Admin Office** button at the top of the window to return to the **Agreement** window.
11. After you have defined the appropriate information on the **Agreement** window, click the **Save** button to save the agreement to the system.
12. Click the **Close Contracts** button to return to the **Time - Contracted** tab.
6. Enter a **Unique Name or VIN** for the contracted resource.
b. In the **Description 1** and **Description 2** boxes, enter any information that may be applicable to the contracted resource (e.g. Make, Model, etc.).
c. In the **286 Remarks** box, enter any remarks you want to print on the OF-286 Invoice.
d. Enter the **Hired Date** for the contracted resource.

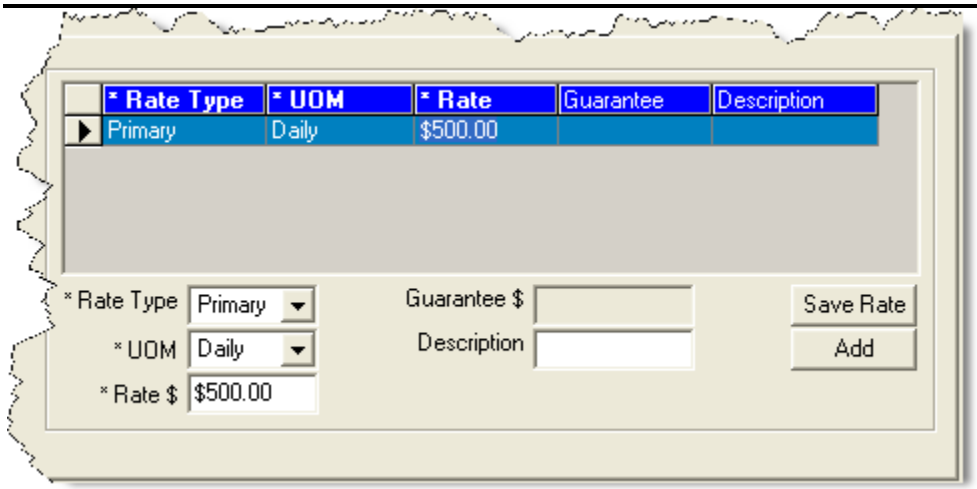
The **Hired Date** on the **Time - Contracted** tab is the same as the **Assign Date** on the **Cost** tab.

10. Enter the **Hired Time** for the contracted resource.
7. If the contracted resource has a government provided operator, click the **Gov't Operator** checkbox to select it.
8. If the government is providing supplies to the contracted resources, click the **Gov't Supplies** checkbox to select it.
9. If the resource was withdrawn, click the **Withdrawn** checkbox to select it.
10. Click the **Save** button to save the **Time Contracted** information to the contracted resource.
11. When the prompt displays asking whether you want to save the resource, click the **Yes** button to save the record.
12. When the **Data Saved** window displays, click the **OK** button to close it.

Defining Rate Information

Follow these steps to add rate information to the Time Contracted record:

1. On the **Time Contracted** tab, move to the **Rate** area that displays on the right side of the tab.



2. Select the type of rate you are defining from the **Rate Type** drop-down list. Rate types include a **Primary** or **Special** rate for the contracted resource.
2. From the **UOM** drop-down list, select the appropriate **Unit of Measure** for the contracted resource.
3. In the **Rate $** box, enter the rate to apply to the contracted resource.
4. If applicable, enter the guaranteed amount for the contracted resource in the **Guarantee $** box.
5. In the **Description** box, enter a description of the rate.
6. Click the **Save Rate** button to save the rate to the contracted resource.
7. Click the **Save** button beneath the **Time - Contracted** tab.
8. When the prompt displays asking whether to save the resource, click the **Yes** button to save the record.
9. Click the **Yes** button to save the **Time Contracted** information.
10. When the **Data Saved** message displays, click the **OK** button to close the window.
11. Click the **Close** button on the **Time Contracted** tab to close the Manage Resource area.

Adding Operators to a Contracted Resource

Follow the steps in this section add operators to a contracted resource.

Not all contracted operators require time data.

The operator may have been added during the initial check in process.

1. Click the **Time** button to open the **Time** window.
3. In the **Resources** grid, click the contracted resource to which you want to add operators.

4. Click the **Edit** button in the toolbar at the top of the window.
5. When the **Manage Resources - Edit Mode** window displays, click the **Roster** button at the bottom of the window. The **Roster Resources Add Mode** window displays.
6. Enter the appropriate information for the operator into the fields on this window.See "Adding Crew Members to the Crew"

Rostering an operator is the same as adding crews.

6. Click the **Save** button to save the operator to the contracted resource.

Posting Contracted Time

Follow the steps in this section to post time for a contracted resource.

Posting Time for Units of Measure

Use the following guidelines when posting time for each type of Unit of Measure (UOM):

- To post a **Daily Rate** for contracted resource time, complete the **Start Date** and **End Date** fields.

You can post for one date or a range of up to five dates.

- To post an **Hourly Rate** for contracted resource time, complete the **Date**, and the **Start** and **Stop Time** fields.

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.

- To post **Mileage** for contracted resource time, complete the **Date** and **Miles** fields.
- To post **Each** for contracted resource time, complete the **Date** and **Each** fields.

Posting Time with ½ Rate and Guarantee Function

Use the following guidelines when posting time using the **1/2 Rate** and **Guarantee** functions:

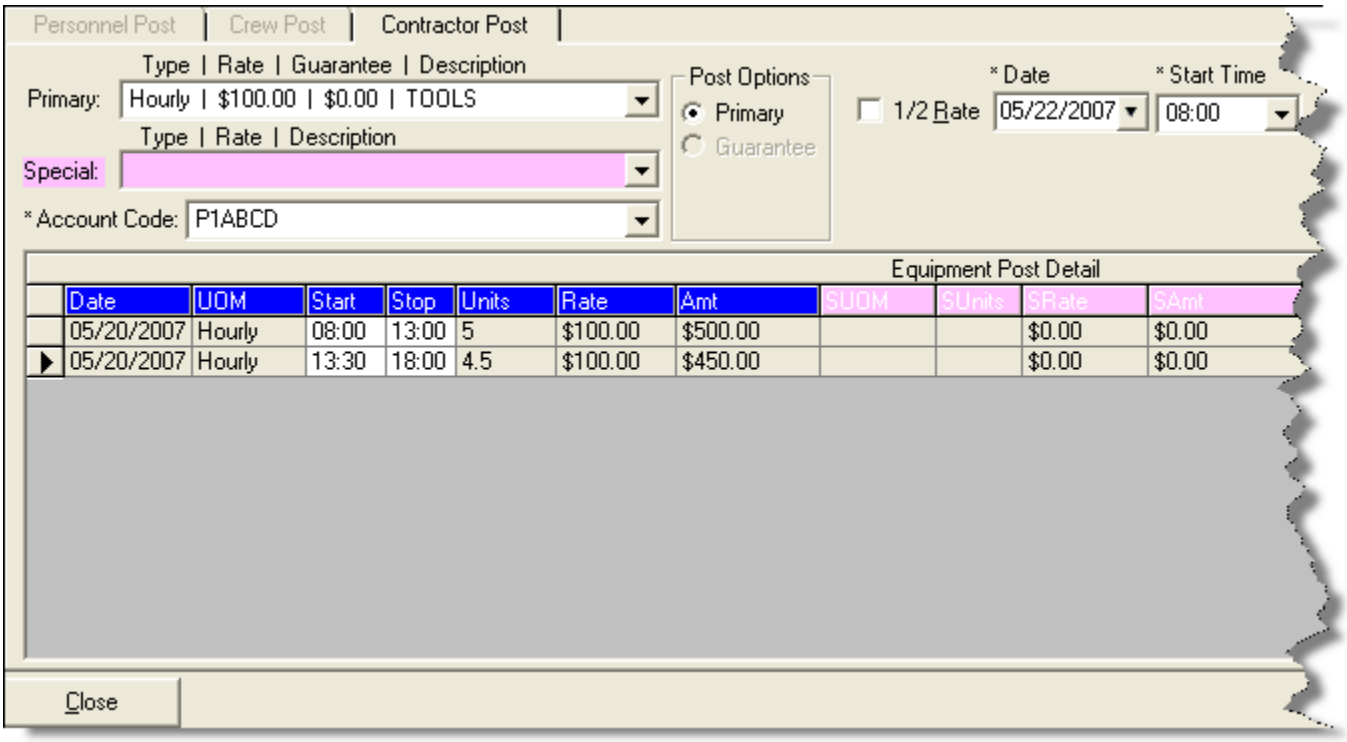
- The **½ Rate** can apply to the **Primary**, **Special**, or **Both Rates** when posting. The **½ Rate** will reduce the guarantee amount on **Daily** by half.
- To post for equipment not currently being used on any given day, but still under hire, enter a minimum for the specific unit of measure to trigger the guarantee.

- The guarantee amount is shown on the OF-286, but does not display on the **Incident Post – Posting Equipment** window.

Posting Contracted Resource Time

Follow the steps in this section to post contracted resource time:

1. Click the **Time** button to open the **Time** window.
- In the **Resources** grid, click the contracted resource for which you are posting time.
- Click the **Post Time** button to display the **Contractor Post** tab at the bottom of the window.



4. From the **Primary Type | Rate | Guarantee** drop-down list, select the appropriate **Primary** rate for the contracted resource.
2. From the **Special Type | Rate | Description** drop-down list, select the appropriate **Special** rate for the contracted resource, if applicable.
3. Under **Post Options**, click to select the appropriate option.

Post Options display based on which **Primary** and **Special UOMs** are selected.

7. If ½ **Rate** applies, click to check the ½ **Rate** checkbox.

5. Enter the remaining information on the window based on the **Post Option** that you selected.
6. To commit the posting, click the **Save** button.
7. When you have finished posting time, click the **Close** button to close the **Contractor Post** tab.

Reposting Contracted Time

Follow the steps in this section to repost contracted time:

1. Click the **Time** button to open the **Time** window.
8. In the **Resources** grid, click the contracted resource for which you are reposting time.
9. Click the **Post Time** button to open the **Contractor Post** tab at the bottom of the window.
10. From the **Primary Type | Rate | Guarantee** drop-down list, select the appropriate **Primary Rate** for the contracted resource.
11. From the **Special Type | Rate | Description** drop-down list, select the appropriate **Special Rate** for the contracted resource.
12. Under **Post Options**, click to select the appropriate option.
13. If **½ Rate** applies, click to check the **½ Rate** checkbox.
14. Enter the remaining information on the window based on the **Post Option** that you selected.
15. To repost the hours for the day, click the **Save** button. An **Overlapping Hours** window displays.
16. Click the **Overwrite** button to repost the new hours to the day.

If you click the **Post Anyway** button, the first set of hours will not be overwritten. Instead, a second record is created for that day with those hours.

12. Click the **Close** button to close the **Posting** area on the **Time** window.

Deleting Posted Contracted Time

Follow the steps in this section to delete time that was posted for a contracted resource:

1. Click the **Time** button to open the **Time** window.
13. In the **Resources** grid, click the contracted resource with the posted time you want to delete.
14. Click the **Post Time** button to open the **Contractor Post** tab at the bottom of the **Time** window.
15. In the **Equipment Post Detail** grid, click anywhere in the row with the posting you want to delete.
16. Click the **Delete** button in the **Main** toolbar to remove the posted time.

17. When the **Delete Posting** window displays, click the **Yes** button to remove the posted time from the system.
18. Click the **Close** button to close the **Contractor Post** tab.

Printing Emergency Equip Invoice/Itemized Deductions Report (OF-286)

Follow the steps in this section to print an Emergency Equipment Invoice or Itemized Deductions Report (OF-286):

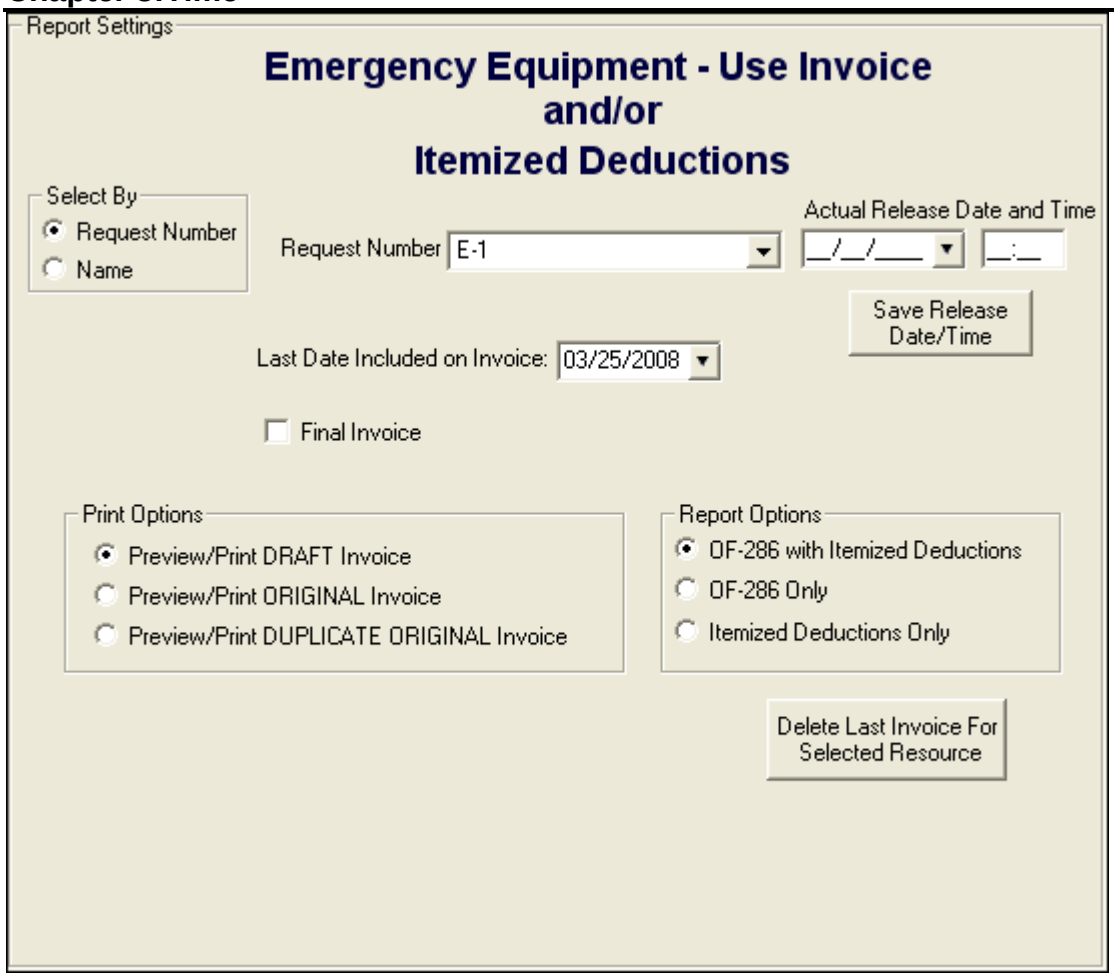
All invoices printed at one time will have the same **First** and **Last Date**.

Deductions/Adjustments prior to the date of the first posted time are included on the OF-286.

Each **Invoice Number** is saved separately. **Adjustments** are associated with an **Invoice Number** that is printed on the **Adjustments** page. Page numbers restart for each **Invoice Number**.

When there are multiple postings on the same day with different account codes (incidents), the OF-286 Report includes amounts for each account code.

1. Click the **Time** button to open the **Time** window.
2. In the **Resources** grid, click the contracted resource for which you are printing the report.
3. Click the **Print Invoice** button to open the **Emergency Equipment - Use Invoice and/or Itemized Deductions** window. Notice that the **Request Number** for the contracted resource you selected displays in the **Request Number** box.



4. To print an invoice for a resource other than the one selected in the Resources grid, click either the **Request Number** or **Resource Name** option. Then select the appropriate number from the **Request Number** drop-down list or the name from the **Resource Name** drop-down list.
2. The **Last Date Included on Invoice** box contains the last date an invoice was posted for the resource. If needed, you can change this date by either typing a new date or selecting it from the drop-down calendar.
3. If this is the final invoice for the contracted resource, click to check the **Final Invoice** checkbox.

When the **Final Invoice** checkbox is checked, the word "Final" prints in box 22 on the OF-286 Invoice. If **Final Invoice** is not checked, the word "Interim" prints in box 22.

7. If the resource was Demobed, enter the **Actual Release Date and Time** for the contracted resource. If you want to save the release date and time information, click the **Save Release Date/Time** button.
5. Under **Print Options**, click one of the following options to identify the type of invoice to create.

- **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.

  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.

When reprinting an invoice, you can only select one invoice, even if multiple invoices were originally printed.

9. When generating a **Draft** invoice, click to select one of the following **Report Options**:

- OF-286 with Itemized Deductions

10. OF-286 Only
11. Itemized Deductions Only

When you are printing an **Original Invoice** or a **Duplicate Original Invoice**, only the **OF-288 with Itemized Deductions** option is available.

10. To preview and then print the report, click the **Preview** button, and then click the **Print Report** button.

    To print the report without previewing, click the **Print** button, and then click the **OK** button on the **Print** window.

If there are missing days of posted time when printing or previewing an OF-286, a warning message displays indicating that time is missing. Click the **OK** button to continue with the **Print** or **Preview** process. Click the **Cancel** button to cancel the **Print** or **Preview** process.

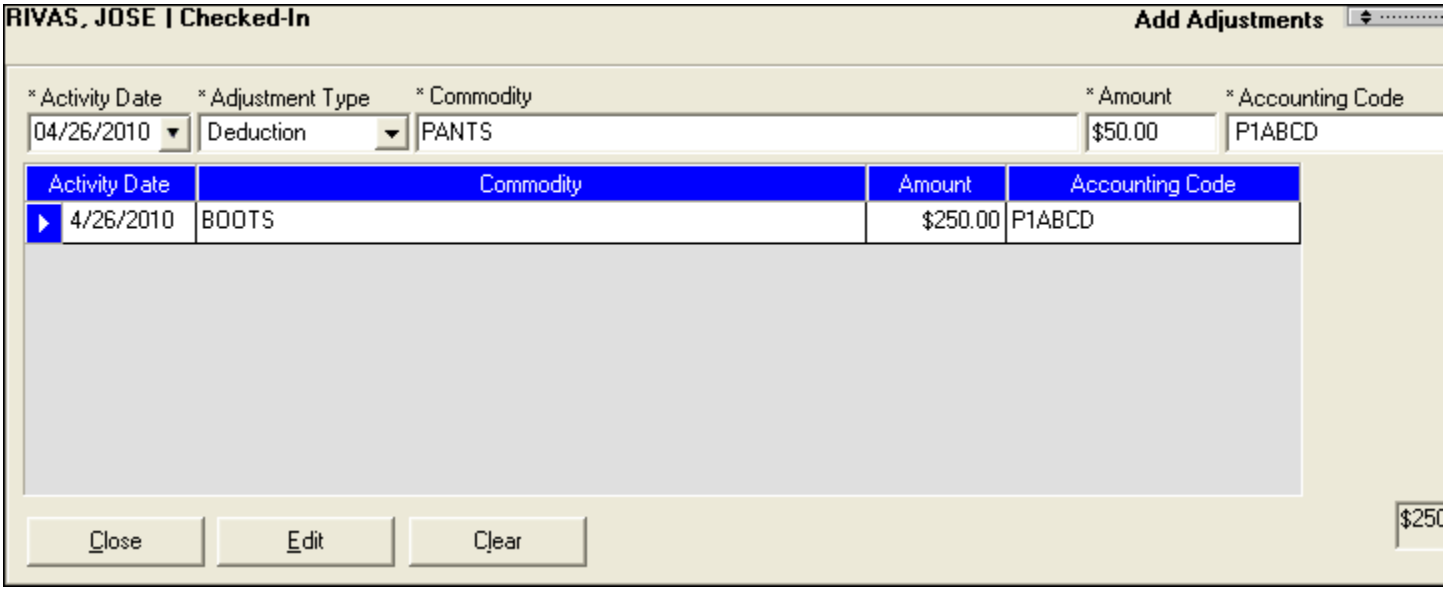
11. To delete the last invoice for the selected resource, click the **Delete Last Invoice for Selected Resource** button.

Deleting the **Last Invoice Last Invoice** deletes all invoices with the same date range (i.e. all that were printed at the same time). A warning lists each Invoice Number and the amount of each invoice being deleted.

Posting Time Adjustments

Time adjustments should be entered for such items as Quarters and Lodging, Meals, Travel, etc. Follow the steps in this section to post time adjustments:

1. Click the **Time** button to open the **Time** window.
12. On the **Time Toolbar**, click the **Adjustments** button to open the **Adjustments** area at the bottom of the window.



3. Enter the **Activity Date** for the adjustment.
2. Select the **Adjustment Type**.

If you select **Addition**, the amount displays as a negative number in the grid. If you select a **Deduction**, the amount displays as a positive number in the grid.

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 appropriate category (e.g. Meals, Lodging, etc.).
4. In the **Commodity** box, type a description of the commodity (e.g. socks, boots, toiletries, etc.).

If you selected a **Category**, an entry in the **Commodity** box is not required.

7. Enter the **Purchase Amount** for the commodity.

To post an addition, place a negative sign (-) in front of the purchase amount.

8. Click the **Save** button to post the adjustment to the system. When the adjustment is saved, it displays in the grid at the bottom of the window.
8. Click the **Close** button to close the **Adjustments** area on the **Time** window.

Editing an Adjustment

Follow these steps to edit an adjustment:

Once an **Original Invoice** is printed, users will not be able to edit the adjustment.

1. Click the **Time** button to open the **Time** module.
9. In the **Resources** grid, click the resource with the adjustment you want to edit.
10. On the **Time Toolbar**, click the **Adjustments** button to open the **Adjustments** area at the bottom of the window.
11. In the grid at the bottom of the window, click to select the row you want to edit.
12. Click the **Edit** button. The system moves the adjustment information to the adjustment boxes.
13. Edit the adjustment information, as needed.
14. Click the **Save** button to save your changes.
15. Click the **Close** button to close the **Adjustments** area on the **Time** window.

Deleting an Adjustment

Follow the steps in this section to delete an adjustment:

Once an **Original Invoice** is printed, users will not be able to delete the adjustment.

1. Click the **Time** button to open the **Time** module.
2. In the **Resources** grid, click the resource with the adjustment you want to delete.
3. On the **Time Toolbar**, click the **Adjustments** button to open the Adjustments area at the bottom of the window.
4. In the grid at the bottom of the window, click to select the row you want to edit.
5. Click the **Delete** button in the **Main** toolbar to remove the adjustment.
6. When the **Delete Adjustment** window displays, click the **Yes** button to remove the adjustment from the system.
7. Click the **Close** button to close the **Adjustments** area on the **Time** window.

Printing Time Reports

Follow the steps in this section to print standard **Time** reports:

I-Suite has a number of features that allow users to produce standard reports.

1. Click the **Reports** button to open the **Select Reports** window.
2. If it is not already selected, click the **Time** tab to select it.
3. Click to select one of the following reports:

- Work/Rest Ratio See "Work/Rest Ratio"

2. Summary of Hours for Personnel See "Summary of Hours for Personnel"
3. Payment Summary of Equipment Usage See "Payment Summary of Equipment Usage"
4. Shifts in Excess of Standard Hours See Shifts in Excess of Standard Hours

5. OF 288 See "Printing an Emergency Fire Fighter Time Report (OF 288)"
6. OF 286 and/or Itemized Deductions See "Printing Emergency Equip Invoice/Itemized Deductions Report (OF-286)"
7. Contractor Debits See "Contractor Debits"
8. Commissary Authorization See "Emergency FireFighter Commissary Authorization"
9. Equipment Management See "Equipment Management Report"
10. Crew Roster See "Crew Roster"
11. Commissary Charges by Date See "Commissary Charges by Date"
12. Personnel Time Report (Print / Fax) See "Personnel Time Report"
13. Missing Days of Postings See "Missing Days of Postings"
14. No Postings Prior See "No Postings Prior"

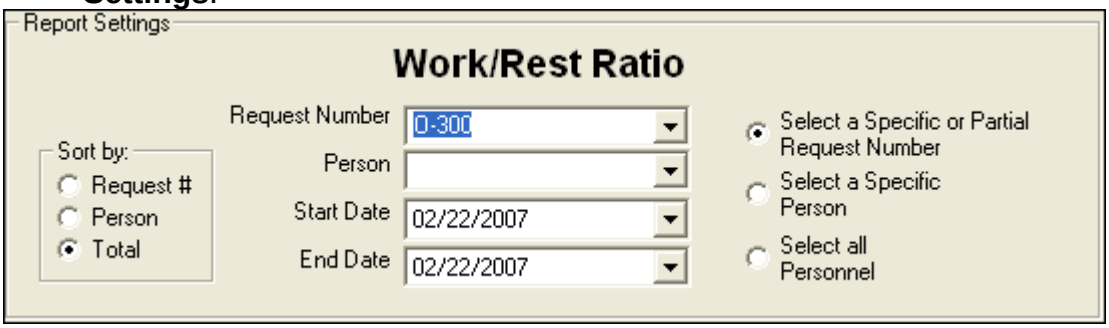
Work/Rest Ratio

This report identifies the ratio between work and rest for a resource at the incident.

The data for the Work/Rest Ratio report does not include GUAR, COP or DAY OFF postings.

To generate a **Work/Rest Ration** report, complete the following steps:

1. On the **Time Reports** window, click **Work/Rest Ratio** to display the **Report Settings**.



2. Under **Sort by**, click the sort option you want to use.
2. If you want to print the report based on a specific or partial request number click the **Select a Specific or Partial Request Number** option. Then select the number from the Request Number drop-down list.

   If you want to print the report based on a specific person, click the **Select a Specific Person** option. Then select the name from the **Person** drop-down list.

   If you want to print the report for all personnel, click the **Select all Personnel** option.
4. Enter the **Start Date** and **End Date** to include in the report.

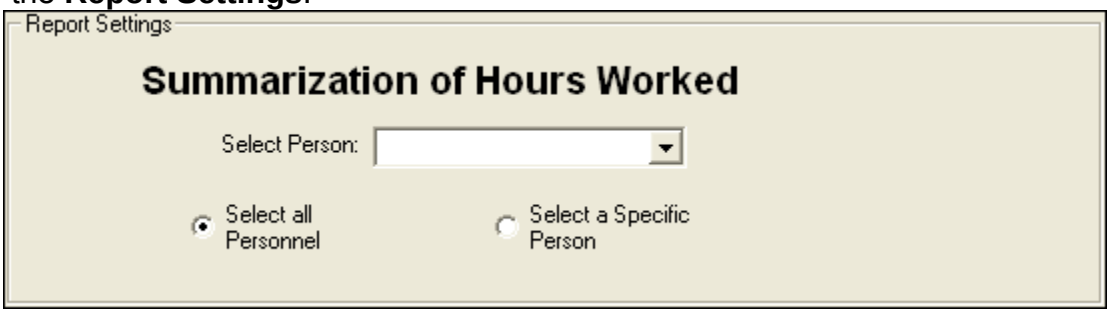
3. To preview and then print the report, click the **Preview** button. When the **Preview** window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
4. When the **Print** window displays, select the printer where you want to send the report and click the **Print** button.

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 steps:

1. On the **Time Reports** window, click **Summary of Hours for Personnel** to display the **Report Settings**.



2. If you want to print the report for all personnel, click the **Select all Personnel** option.

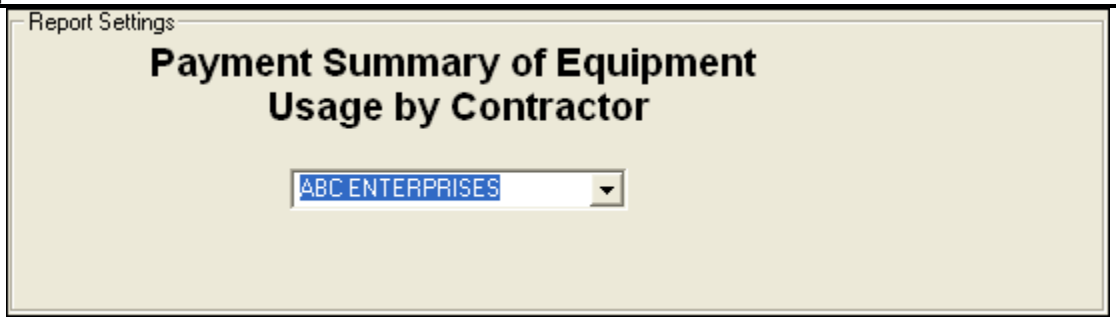
   If you want to print the report for a specific person, click the **Select a Specific Person** option. Then select the person from the **Select Person** drop-down list.
3. To preview and then print the report, click the **Preview** button. When the **Preview** window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
3. When the **Print** window displays, select the printer where you want to send the report and click the **Print** button.

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 steps:

1. On the **Time Reports** window, click **Payment Summary of Equipment Usage** to display the **Report Settings**.



2. From the **Contractor** drop-down list, select the **Contractor** for which you are creating the report.
2. To preview and then print the report, click the **Preview** button. When the **Preview** window displays, click the **Print Report** button.

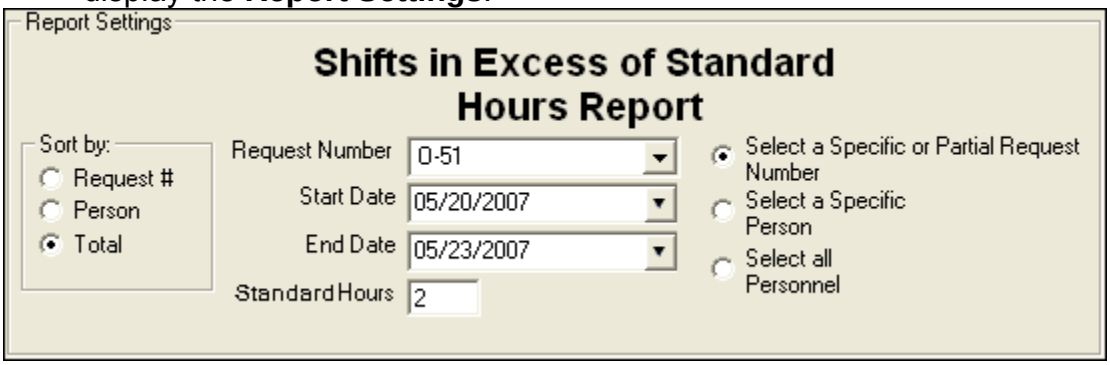
   To print the report without first previewing it, click the **Print** button.
3. When the **Print** window displays, select the printer where you want to send the report and click the **Print** button.

Shifts in Excess of Standard Hours

The data for the Shifts in Excess of Standard Hours report does not include GUAR, COP or DAY OFF postings.

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 steps:

1. On the **Select Reports** window, click **Shifts in Excess of Standard Hours** to display the **Report Settings**.



2. Under **Sort by**, click the option to use in sorting information in the report.
2. If you want to print the report based on a specific or partial request number, click the **Select a Specific or Partial Request Number** option. Then select the request number from the **Request Number** drop-down list.

If you want to print the report based on a specific person, click the **Select a Specific Person** option. Then select the person from the **Name** drop-down list.

If you want to include all personnel in the report, click the **Select All Personnel** option.

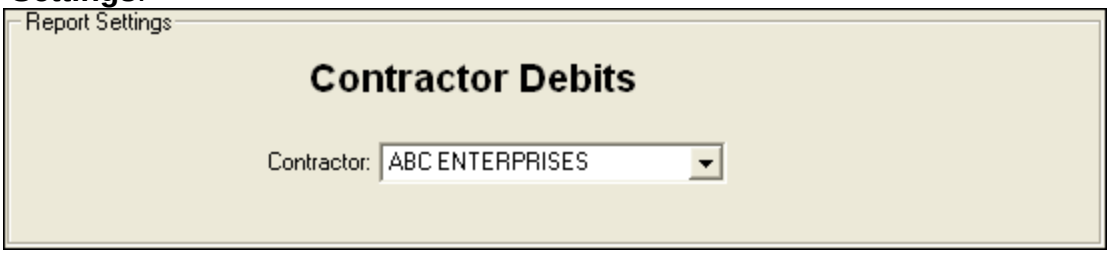
3. Enter the **Start Date** and **End Date** to include in the report.
4. Enter the **Standard Hours** to use in calculating the excess hours (e.g. if you enter 8, the report will include employees with hours in excess of 8).
5. To preview and then print the report, click the **Preview** button. When the Preview window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
6. When the **Print** window displays, select the printer where you want to send the report and click the **Print** button.

Contractor Debits

This report identifies debit amounts for a selected contractor. To generate a **Contractor Debits** report, complete the following steps:

1. On the **Time Reports** window, click **Contractor Debits** to display the **Report Settings**.



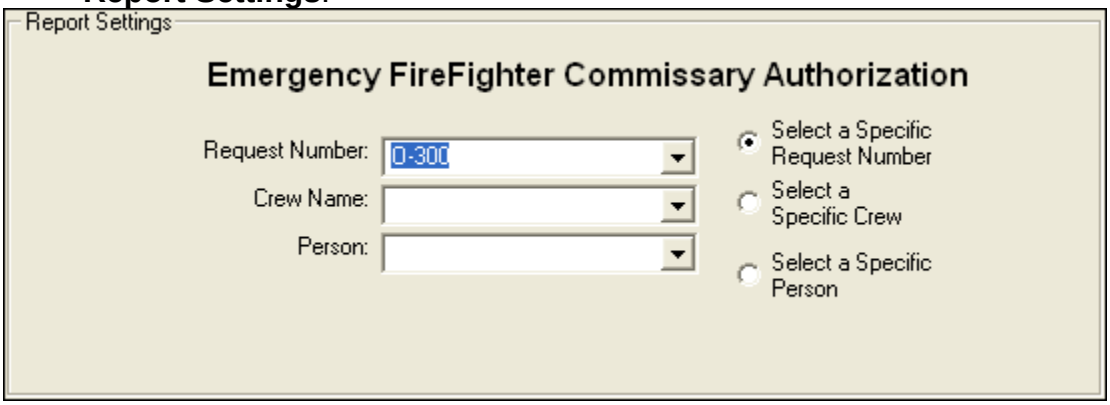
2. From the **Contractor** drop-down list, select the appropriate **Contractor**.
2. To preview and then print the report, click the **Preview** button. When the **Preview** window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
3. When the **Print** window displays, select the printer where you want to send the report and click the **Print** button.

Emergency FireFighter 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 steps:

1. On the **Time Reports** window, click **Commissary Authorization** to display the **Report Settings**.



2. If you want to print the report based on a specific request number, click the **Select a Specific Request Number** option. Then select the request number from the **Request Number** drop-down list.

   If you want to print the report based on specific crew, click the **Select a Specific Crew** option. Then select the crew from the **Crew Name** drop-down list.

   If you want to print the report based on a specific person, click the **Select a Specific Person** option. Then select the name from the **Person** drop-down list.
2. To preview and then print the report, click the **Preview** button. When the **Preview** window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
3. When the **Print** window displays, select the printer where you want to send the report and click the **Print** button.

Equipment Management Report

This report identifies the equipment being used at the incident. To generate an **Equipment Management** report, complete the following steps:

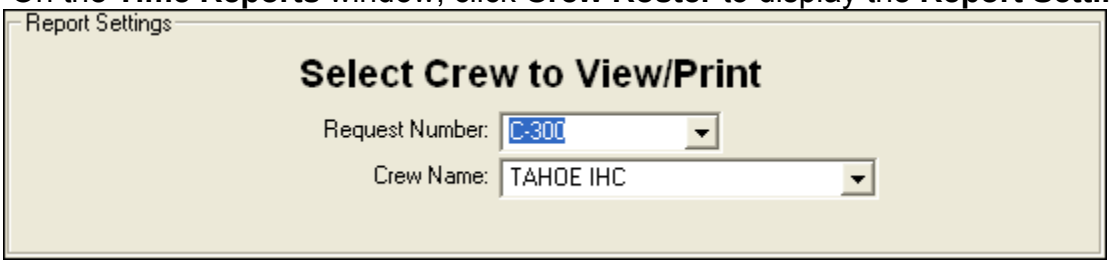
1. On the **Time Reports** window, click **Preview Equipment Management**.
3. To preview and then print the report, click the **Preview** button. When the Preview window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
4. When the **Print** window displays, select the printer where you want to send the report. Then click the **Print** button.

Crew Roster

The Crew Roster contains a list of all members assigned to the crew identified on the Select Report window. To generate a **Crew Roster** report, complete the following steps:

1. On the **Time Reports** window, click **Crew Roster** to display the **Report Settings**.



2. From the **Request Number** drop-down list, select the **Request Number** to use for the report.

   OR

   From the **Crew Name** drop down list, select the **Crew** to use for the report.
2. To preview and then print the report, click the **Preview** button. When the **Preview** window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
3. When the **Print** window displays, select the printer where you want to send the report and click the **Print** button.

Commissary Charges by Date

This report identifies resources that have made charges to the Commissary. To generate a **Commissary Charges by Date** report, complete the following steps:

1. On the **Time Reports** window, click the **Preview Commissary Charges by Date**.
3. To preview and then print the report, click the **Preview** button. When the **Preview** window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
4. When the **Print** window displays, select the printer where you want to send the report and click the **Print** button.

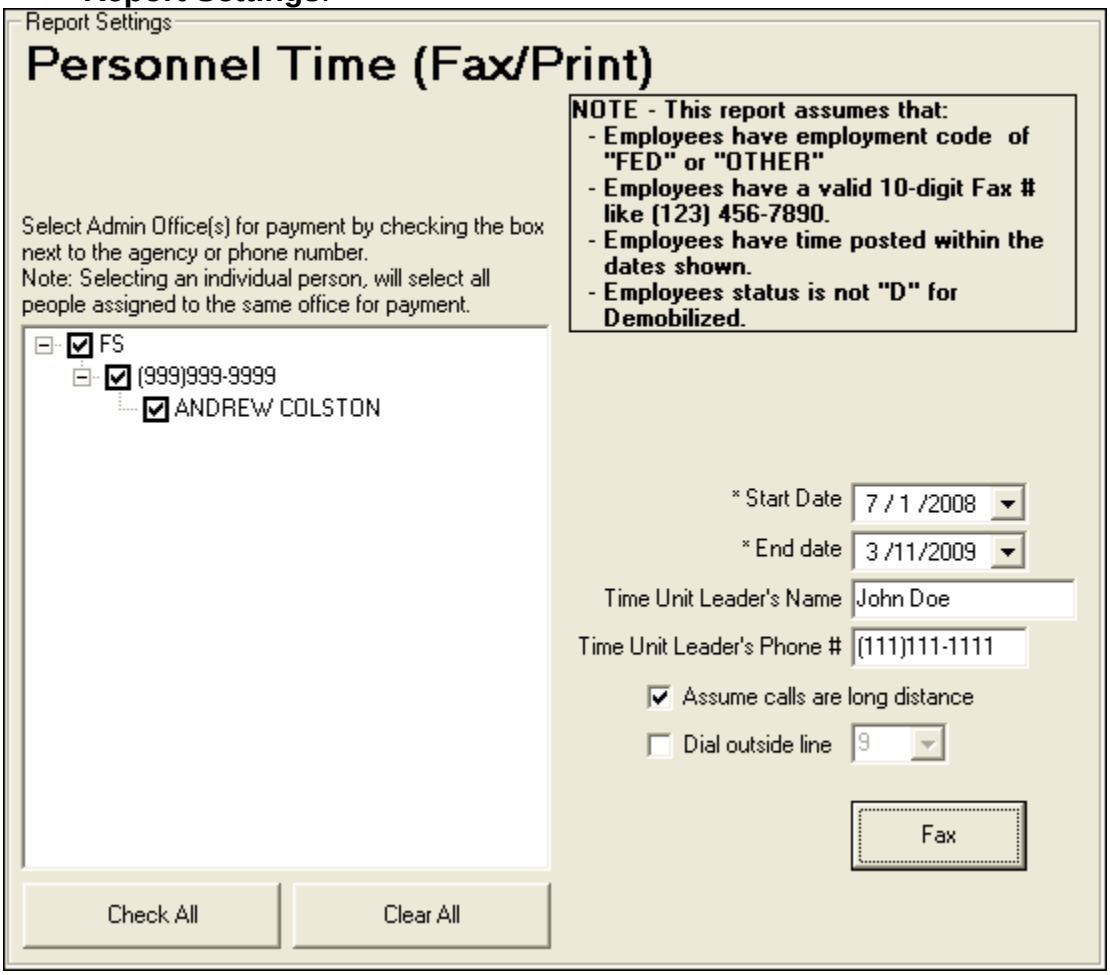
Personnel Time Report

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
2. Assigned fax number
3. Employment code of FED or OTHER
4. An employment status that is NOT D (Demobilized)

To generate a **Personnel Time Report**, complete the following steps:

1. On the **Time Reports** window, click **Personnel Time Report** to display the **Report Settings**.



2. Enter the **Start Date** and **End Date** to include in the report.

The range of dates you select (Start Date and End Date) should include the days for which personnel time was posted.

When you select a date range, the application automatically populates the text box on the left. If the box does not populate, then one or more of the previously defined criteria was not met for the selected range of dates.

3. Enter the **Time Unit Leader's Name**.
3. Enter the **Time Unit Leader's Phone #**.
4. If the fax numbers are long distance, click to check the **Assume calls are long distance** option.
5. 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.
6. On the left side of the **Report Settings** frame, select the appropriate **Agencies** and **Payment Offices**.

   You can expand the list of **Agencies** and **Payment Offices** by clicking the plus sign (+) next to an entry. To close the expanded list, click the minus sign (-) next to the entry.

Selecting an agency will select all offices from that agency in the tree. You can select individual offices within an agency, and you can also select individual people on the tree. Selecting an individual person will select all people assigned to the same fax number and include them in the report.

6. Under **Select Admin Office(s) for Payment**, click to check the appropriate checkbox(es).
4. To preview and then print the report, click the **Preview** button. When the Preview window displays, click the **Print Report** button.

   To print the report without previewing it, click the **Print** button.

A new page is generated for each fax number included in the report.

8. To fax a Personnel Time Report directly from I-Suite, click the **Fax** button.

Requirements for faxing a **Personnel Time Report**:

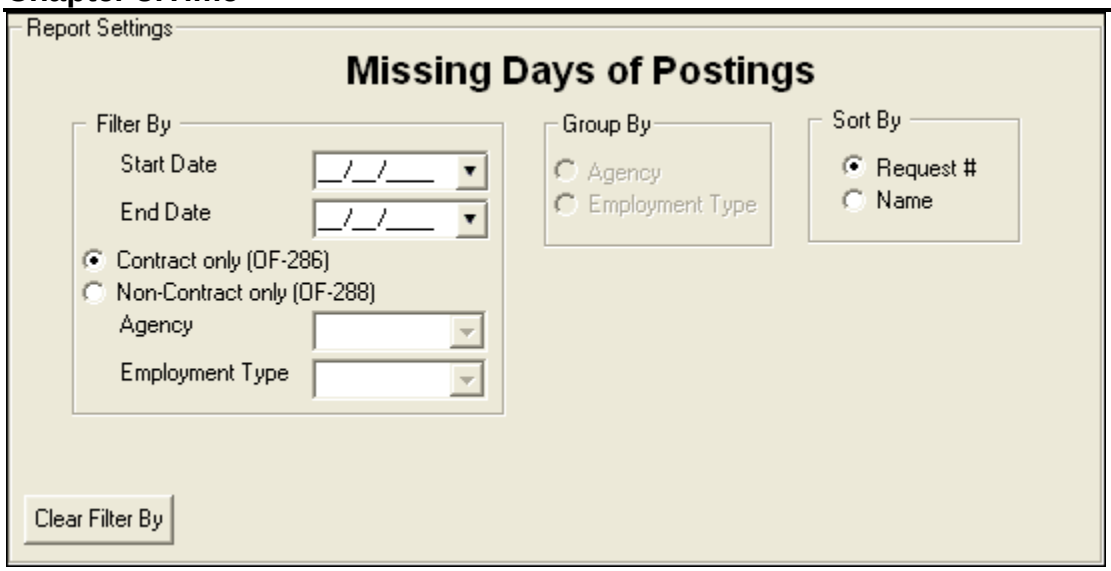
- A fax modem that is properly installed and correctly configured.
- A fax printer device properly set up in the printers folder.

9. Follow the prompts that display on your screen for faxing the report.

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 steps:

1. On the **Time Reports** window, click **Missing Days of Postings** to display the **Report Settings**.



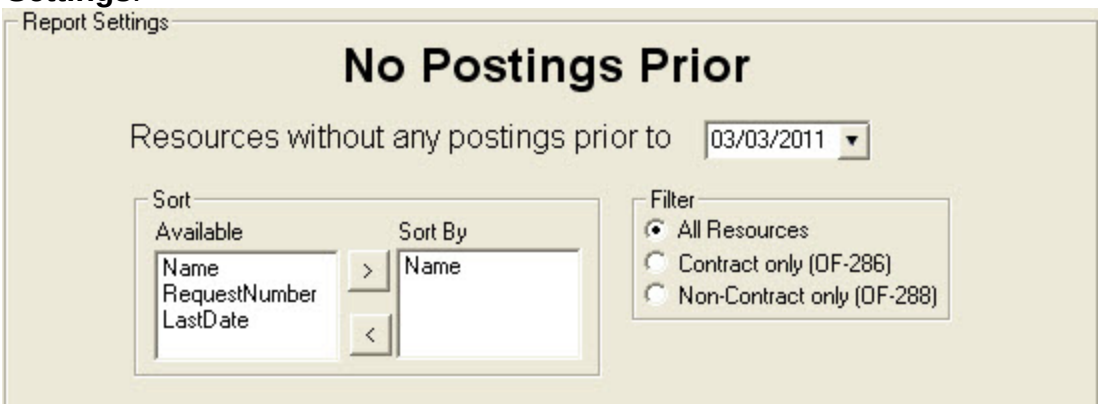
2. Enter the dates to include in the report in the **Start Date** and an **End Date** boxes.
2. Click one of the following options to identify the information to include in the report:
- **Contract only (OF-286)** - Only includes contracted resources.
3. **Non-Contract ony (OF-288)** - Only includes non-contracted resources.
3. When you select the **Non-Contract only (OF-288)** option, you can limit the report to a specific agency by selecting an agency from the **Agency** drop-down list.
- When you select the Non-Contract (OF-288) option, you can limit the report to a specific employment type by selecting a type from the **Employment Type** drop-down list.
- When you select the Non-Contract (OF-288) option, you can group the data in the report by **Agency** or **Employment Type** by clicking the appropriate option under **Group By**.
- Under **Sort By**, click one of the following options to identify the order in which to sort the information in the report:
- **Request #** - Sorts the information by request number.
4. **Name** - Sorts the information by name.
4. To preview and then print the report, click the **Preview** button. When the **Preview** window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
- When the **Print** window displays, select the printer where you want to send the report and click the **Print** button.

No Postings Prior

This report lists those resources with no time posted after a specified date. To generate the No Postings Prior report, complete the following steps:

1. On the **Time Reports** window, click **No Postings Prior** to display the **Report Settings**.



2. In the **Resources without any postings prior to** box, either type a date or select it from the drop-down calendar. The report will include resources with no time posted after the defined date.
2. Under **Sort/Available**, double click the sort(s) to use in the report. The sort(s) you select are moved under **Sort By**.

The **Name** sort is automatically selected. If you do not want to use the **Name** sort, click to select it under **Sort By**. Then click the **<** button.

4. Under **Filter**, click one of the following options to identify the information to include in the report:

- **All Resources** - Includes both Contract and Non-Contract resources.

5. **Contract Only (OF-286)** - Only includes contracted resources.
6. **Non-Contract only (OF-288)** - Only includes non-contracted resources.
5. To preview and then print the report, click the **Preview** button. When the **Preview** window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.

- When the **Print** window displays, select the printer where you want to send the report then click the **Print** button.

Advanced Contracting

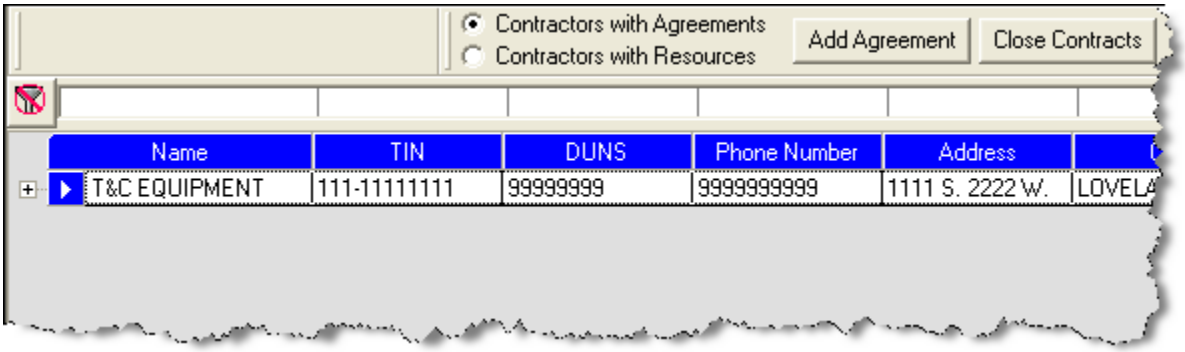
This section identifies how to work with complex contracts for resources, such as contract crews and engines, portable toilets, and resources with multiple rates based on duration.

Review contracts and shift tickets to add contractor data and post time to contracted resources.

Identify Existing Contractors

Follow the steps in this section to identify contractors that already exist in the I-Suite system:

1. Click the **Time** button to open the **Time** module.
6. From the **Time** drop-down menu, select **Contractors** to open the Contractors window:

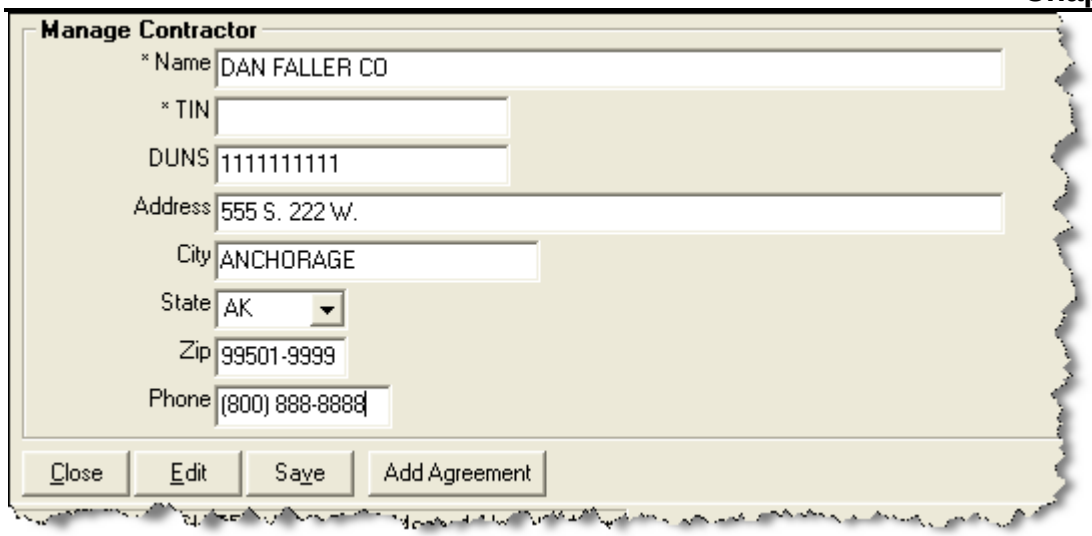


3. To view all contractors with agreements, click the **Contractors with Agreements** option. When you select this option, the grid at the bottom of the window displays a list of all contractors with agreements.
2. To view all contractors with resources, click the **Contractors with Resources** option. When you select this option, the grid at the bottom of the window displays a list of all contractors with resources.

Adding Contractors

If you need to add a contractor to the I-Suite system, follow the steps in this section:

1. Click the **Time** button to open the **Time** module.
4. From the **Time** drop-down menu, select the **Contractors** option.
5. Click the **Add** button in the **Main** toolbar at the top of the window. An **Add Contractor** area displays at the bottom of the Contractors window where you can enter the contractor information:



4. Complete the following information:
- *Name
5. *TIN
6. DUNS
7. Address
8. City
9. State
10. Zip
11. Phone
5. Click the **Save** button to save the Contractor to I-Suite.
- Click the **Close** button to close the **Add Contractor** area at the bottom of the window.

Adding an Agreement to a Contractor

To add an agreement to a contractor record, follow the steps in this section:

1. Click the **Time** button to open the **Time** module.
6. From the **Time** drop-down menu, select the **Contractors** option.
7. On the **Contractor** window, click the appropriate contractor in the grid.
8. Click the **Add Agreement** button. An **Add Agreement** area displays at the bottom of the window.

5. Complete the following information:
- *Agreement Number
6. Point of Hire
7. Beginning Date
8. Expiration Date
9. Administrative Office for Payment

If the Appropriate Administrative Office for Payment does not display in the drop-down list, click the **Add New Administrative Office Payment** button to add the office to the system.

6. Click the **Save** button. To close the **Add Agreement** area at the bottom of the window, click the **Close** button.
- Click the **Close Contracts** button to close the **Contractor** window.

Linking Contractor to Resource and Rates

To link the contractor and their agreement to a resource and rates, follow the steps in this section:

1. Click the **Time** button to open the **Time** module.
7. In the **Resources** grid, click the appropriate resource.
8. On the **Time-Contracted** tab, select the appropriate contractor from the **Contractor Name** drop-down list.
9. From the **Agreement Number** drop-down list, select the appropriate agreement number.
10. Complete the following fields on the **Time-Contracted** tab:
- Unique Name
2. Description 1 & 2
3. 288 Remarks
4. Hired Date & Time
5. If appropriate, click to check the **Gov't Operator** and **Gov't Supplies** checkboxes.
6. If appropriate, click to check with the **Withdrawn** checkbox.
7. From the **Rate Type** drop-down list, select the appropriate rate type.
8. From the **UOM** drop-down list, select the appropriate unit of measure.

9. In the **Rate$** field, type the appropriate rate amount.
10. Click the **Save Rate** button to save the rate.
6. Click the **Save** button on the **Time - Contracted** tab.

Make sure you add all primary rates and special rates for mileage.

UOM Key Points

The following are key points to remember when working with Units of Measure (UOM):

- All contracted resources must have a primary rate designation.
7. A contracted resource may or may not have one to five special rate designations.
8. Units of Measure include Daily, Each, Hourly, and Mileage.
9. Make sure you match the correct rate type with the correct UOM.

Posting Time for Complex Contract

To post time for a complex contracted resource, follow the steps in this section:

1. Click the **Time** button to open the **Time** module.
- Click the **Post Time** button to open the Posting area at the bottom of the window.
- In the **Resources** grid, click the contracted resource.
- On the **Contractor Post** tab, select the appropriate account code from the **Account Code** drop-down list.
- Under **Post Options**, click to select the appropriate **Rate Type**.
- If one-half rate applies, click to check the **1/2 Rate** checkbox.
- Complete the remaining boxes with the appropriate information for that **Rate Type** and **Unit of Measure**.
- Click the **Save** button to commit the posting.
- Click the **Close** button to close the posting area at the bottom of the window.

Time Revision History

Revision Date	Revision Summary
2010-04-27	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised instructions for the 9.01.00 version of I-Suite.
2009-01-16	Revised instructions for the 8.01.05 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Revised instructions for the 7.01.00 version of I-Suite.
2007-01-16	Revised instructions based on changes received for Training Manuals.
2006-12-04	Revised instructions by adding more detail and graphics.

2006-06-12	Revised instructions for the 6.02 version of I-Suite.
2006-04-17	Revised instructions for the new I-Suite 2006 application.
2005-02-28	Revised instructions for the new I-Suite website and to reflect changes in procedures from the June and August 2004 I-Suite releases.

Cost

The **Cost** section explains how to use the **Cost** module to easily track costs for individual resources. The system creates a Daily Cost record for every resource that is checked-in with **Generate Daily Costs** selected. **Cost** users can analyze, manipulate and create output from this information.

You can 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.

Information entered in **Cost** is shared with other I-Suite modules, including:

- Resources
2. Demob
3. Incident Action Plan (IAP)
4. Time
5. Supply

Topics in this guide include the following:

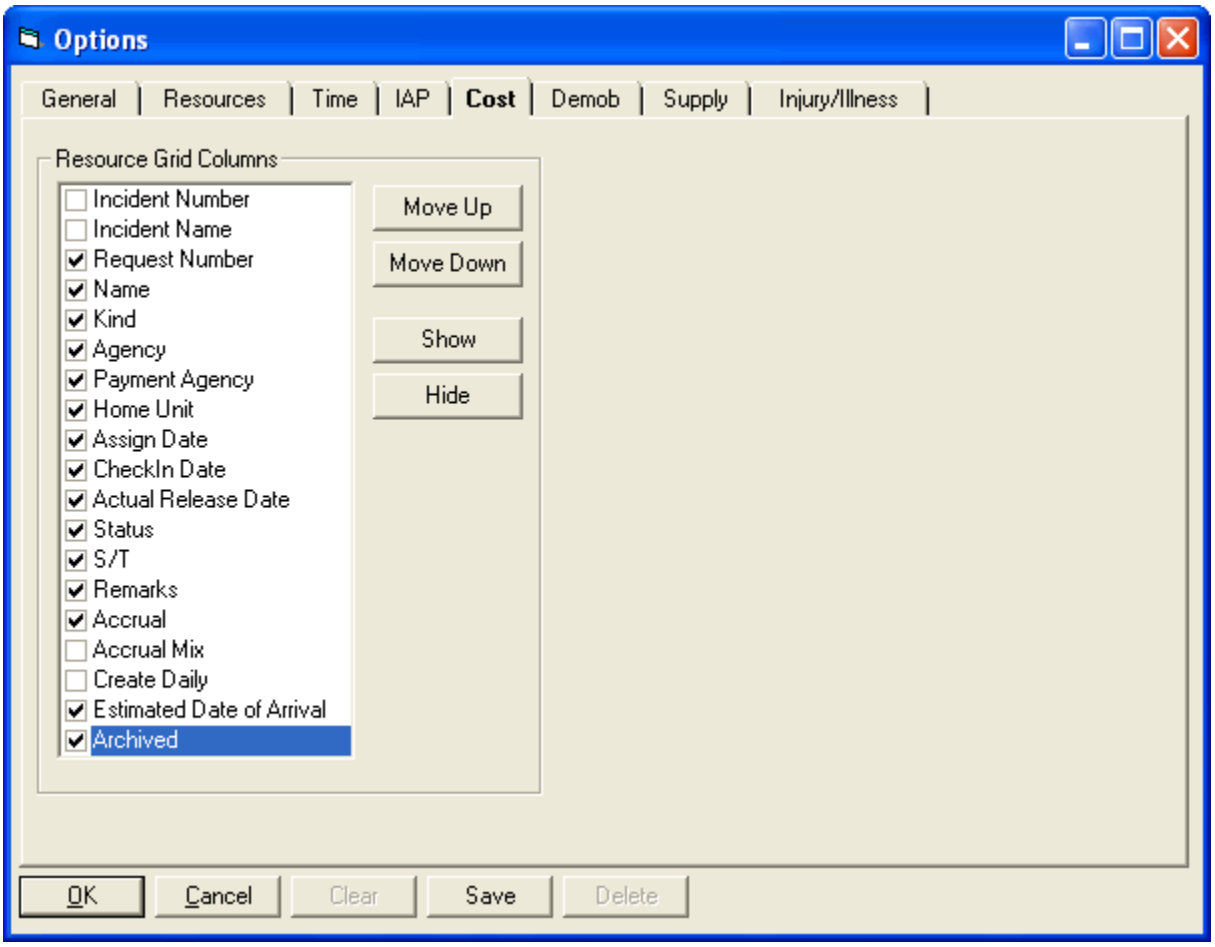
- See "Common Features"
- See "Selecting Cost Options"
- See "Reviewing Common Data"
- See "Archive Resources"
- See "Cost Processes"
- See "Cost Rates"
- See "Cost Resources"
- See "Cost Daily Records"
- See "Cost Reports"
- See "Acres Burned"
- See "Cost Analysis/Benchmark Report Setup"
- See "Cost Graphs"
- See "Cost Accruals"
- See "Cost Projections"
- See "Cost Share Apportionment"

Selecting Cost Options

Follow the steps in this section to select options to use in the **Cost** area of the I-Suite system:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.

- Click the **Cost** tab to select it.



3. Under **Resource Grid Columns**, hold down the **Ctrl** key and click to highlight each column that you want to select.
2. If you want to remove the selected columns from the **Cost** window, click the **Hide** button.

   If you want to display the selected columns on the **Cost** window, click the **Show** button.

Each column with a checkmark in the checkbox next to it is included in the grid. When

you click the **Show** button, it places a checkmark in the checkbox. When you click the **Hide** button, it removes the checkmark from the checkbox. You can also click the checkbox next to a column to either **Show** or **Hide** it.

5. To adjust the order in which the columns display on the **Cost** window, click a column. Then click the **Move Up** or **Move Down** button to move the selected column.

The order in which the columns display under **Resource Grid Columns** is the order in which they will display in the grid.

6. When you have made all of your changes, click the **Save** button to save the changes. Then click the **OK** button to close the Options window.

Cost Tips

Keep the following in mind for the Cost module:

- All **Cost Estimates** and **Accruals** are based on **Kind Code** and **Agency**.
7. The **Cost** module uses the **Check-In Date** to start generating costs until **Time** is posted or the **Cost User** enters an **Assign Date**.
8. To adjust an **Accrual Code**, add the appropriate **Payment Agency** that is paying for the resource. (e.g. If you are on a BLM incident, add BLM to the Payment Agency box for PVT resources. This adjusts the Accrual Code to FED.)
9. 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 estimates at $8,200 for each member into a rollup cost of $164,000.)
   - Each member should be identified as a FFT1, CRWB, etc.
- Leave the **Agency Code** blank for **Subordinates** of **Contract Resources** that do not need to be included in the actual process (e.g. Contract Dozer Operators).
   - A **Demobed Resource** continues to generate **Cost** until an **Estimated Date of Arrival** or **Actual Release Date** is defined.
   - The **Estimated Date of Arrival** or **Actual Release Date** does not flow-down to subordinates from the parent resource. Subordinates that fall into one of the **Accrual Categories** will continue to generate costs on the **Accrual Report** until an **Estimated Date of Arrival** or **Actual Release Date** is defined.
   - Make sure you enter the **Estimated Date of Arrival** or **Actual Release Date** for each **Subordinate Resource** in the **Demob** module.

Generate Daily Costs

This section outlines when the Generate Daily Costs checkbox is checked for Parents and Subordinates and the results when the Update with Actuals process is run.

I-Suite automatically checks or un-checks the Generate Daily Costs checkbox based on the Resource configuration.

- A Resource with NO Subordinates that may or may not contain actual posted Time (e.g. most overhead resources, resources with no subordinates, contract resources without subordinates.):
  - **Parent Resource** - Generate Daily Costs is checked.
- **Subordinate Resource** - There is no subordinate resource.
- A Resource with Subordinates. No Time posted for either the Parent or the Subordinate (e.g. Non-contract Crews and Engines prior to posting actual time):
  - **Parent Resource** - Generate Daily Costs is checked.
- **Subordinate Resource** - Generate Daily Costs is NOT checked.
- A Resource with Subordinates. Actual Time is Posted to a Subordinate (e.g. Federal Crews and Engines after Actual Time was posted) and the Agency code is set to one of the following: AMD, APHS, BIA, BLM, BOR, DES, DOD, DOE, FED, FS, FWS, IAC, NPS, NWS, TRIB, USGS (Agency Group Code is F).
  - **Parent Resource** - Generate Daily Costs is NOT checked.
- **Subordinate Resource** - Generate Daily Costs is checked for ALL Subordinates, even if only one Subordinate has an actual Time posting.

If all actual Time postings are deleted in the Time module for All Subordinates, then the Generate Daily Costs is checked for the Parent and NOT checked for the Subordinates.

- A Resource with Subordinates. Actual Time is posted to both the Parent and the Subordinates. (e.g. Pickup truck with AD driver.)
  - **Parent Resource** - Generate Daily Costs is checked.
- **Subordinate Resource** - Generate Daily Costs is checked.
- Air Resources without Subordinates:
  - **Parent Resource** - Generate Daily Costs is checked.
- **Subordinate Resource** - There is no subordinate resource.
- Air Resources with Subordinates either with or without Time posted:
  - **Parent Resource** - Generate Daily Costs is checked.
- **Subordinate Resource** - Generate Daily Costs is checked.

Both Parent and Subordinates are checked to generate separate aircraft and crew costs.

Reviewing Common Data

This section explains how to review common data from the **Cost** module.

Follow the steps in this section to review common data:

Information located above the tabs (if any) in the **Manage Resource - Edit Mode** area

is considered the **Common Data** for a **Resource**.

1. Click the **Cost** button to open the **Cost** module.
   - In the **Resources** grid, click to select the Resource you want to view.
   - Click the **Edit** button to open the record in the **Manage Resource - Edit Mode** area at the bottom of the window.
   - In the **Manage Resource – Edit Mode** area, review the following information for completeness and accuracy:
   - *Request Number
2. *Account Code
3. Person - checked, if applicable
4. Contracted - checked, if applicable
5. *Resource Name
6. *Kind/Position
7. Trainee - checked, if applicable
8. *Status
9. Unit ID
10. Agency
11. *Configuration
12. Actual Release Date
13. Actual Release Time

A label preceded by an asterisk (*) indicates that the information is required.

When the **Person** option is checked, **Resource Name** is replaced with **Last Name** and **First Name**. Either a **Last Name** or a **First Name** is required. You do not need to define both in order to save the record.

If you change the **Person** or **Contracted** selection and time was posted for the resource, a message displays indicating that the time postings will be deleted if you continue. When you select **Yes**, the system deletes all time postings. When you select **No**, the system does not change the **Person** or **Contracted** selection.

If you change the **Person** or **Contracted** selection and one or more invoices were already generated for the resource, a message displays indicating that the resource has invoiced postings. You must manually delete those postings before you can change the **Person** or **Contracted** selection.

5. To close the **Manage Resource - Edit Mode** window, click the **Close** button.

Archive Resources

This section explains the process of archiving resources in the Cost module. Archiving resources makes the Cost Processes run more efficiently.

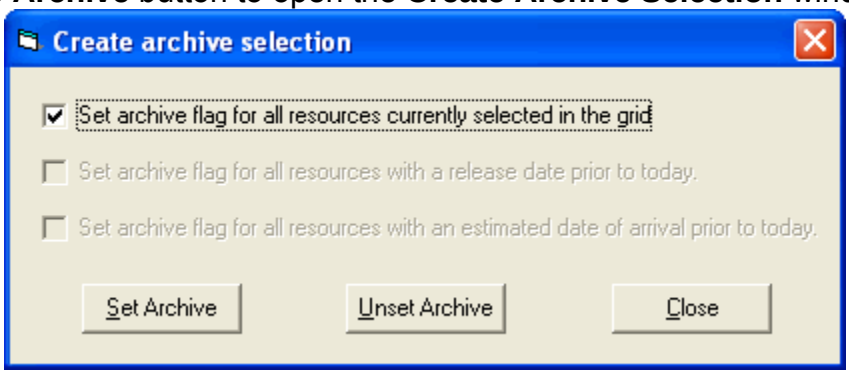
If you are archiving resources selected in the **Resources** grid, you cannot run any other archive options at the same time.

If you want to archive all resources with either an **Estimated Date of Arrival** or an **Actual Release Date** prior to the current date, both of those options can be selected to run at the same time.

Archive Selected Resources

Follow the instructions in this section to archive resources that are selected in the Resources grid.

1. Click the **Cost** button to open the **Cost** module.
6. In the **Resources** grid, click one or more resources to include in the archive.
7. Click the **Archive** button to open the **Create Archive Selection** window.



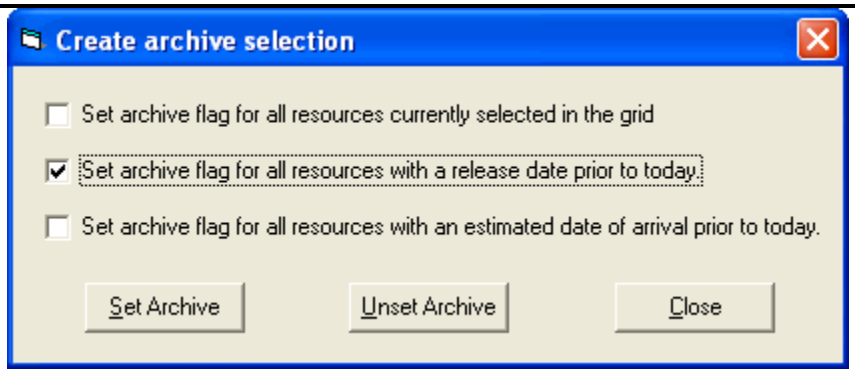
4. Click to check the **Set archive flag for all resources currently selected in the grid** option.
2. Click the **Set Archive** button.

To remove resources from the archive, repeat these same steps and click the **Unset Archive** button.

Archive Resources with a Release Date

Follow the instructions in this section to archive resources that have an Actual Release Date defined that is prior to the current date.

1. Click the **Cost** button to open the **Cost** module.
5. Click the **Archive** button to open the **Create Archive Selection** window.



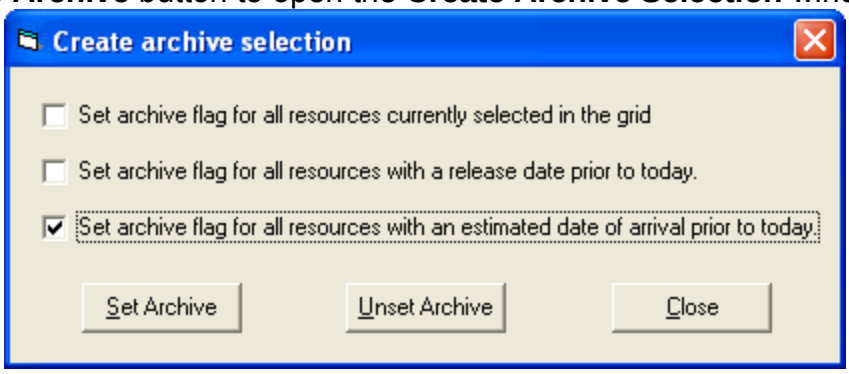
3. Click to check to the **Set archive flag for all resources with a release date** option.
2. Click the **Set Archive** button.

To remove resources from the archive, repeat these same steps and click the **Unset Archive** button.

Archive Resources with an Estimated Date of Arrival

Follow the instructions in this section to archive resources that have an Estimated Date of Arrival defined that is prior to the current date.

1. Click the **Cost** button to open the **Cost** module.
4. Click the **Archive** button to open the **Create Archive Selection** window.



3. Click to check the **Set archive flag for all resources with an estimated date of arrival** option.
2. Click the **Set Archive** button.

To remove resources from the archive, repeat these same steps and click the **Unset Archive** button.

Cost Processes

This section identifies the **Cost Processes** you can perform in the **Cost** module.

The following are key concepts to understanding **Cost Processes**:
- Each action is a separate process.
- Each process draws from distinct data in the database.
- The processes do not overlap.

The **Cost Processes** drop-down list is located in the **Cost** toolbar. Use the **Cost Process** options to perform the following procedures.

- **Create Cost, Update Actuals & Re-Estimate** See "Creating Cost and Updating with Actuals"- 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.
- **Create Cost & Update with Actuals** See "Creating Cost and Updating with Actuals" – Creates estimated daily cost data from the rates lookup table and updates this data with actual cost data.
- **Create Cost Only** See "Creating Cost and Updating with Actuals" – Creates estimated daily cost data from the rates lookup table.
- **Cost Lock/Unlock** See "Locking/Unlocking Cost Records" – Locks (or unlocks) all cost records from the selected date forward.
- **Re-Estimate** See "Creating Cost and Updating with Actuals" - 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**.
- **Update with Actuals Only** See "Creating Cost and Updating with Actuals" – Updates daily cost with actual cost data.

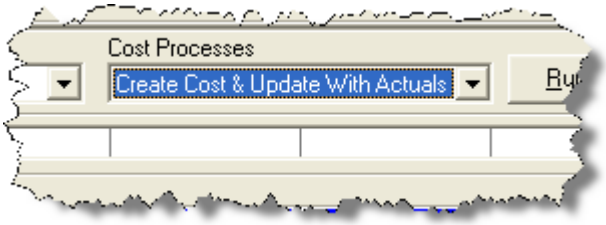
Creating Cost and Updating with Actuals

Follow the steps in this section to create cost and update with actuals:

Creating/updating the Daily Costs is the first step that a Cost user must perform and should be completed before entering any data.

1. Click the **Cost** button to open the **Cost** module.

- In the **Cost** toolbar, click the **Cost Processes** box to display the drop-down list.



- From the list that displays, select one of the following options:
- **Create Cost, Update 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 this data with **Actual Cost** data.
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** - Updates **Daily Cost** with **Actual Cost** data.
4. Click the **Run** button to run the **Cost** process.

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.

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**.

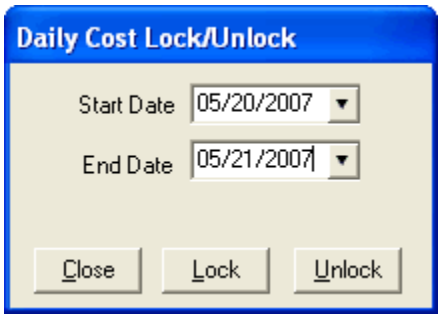
Locking/Unlocking Cost Records

Follow the steps in this section lock or unlock all Cost records from the selected date forward:

This feature locks or unlocks all of the entries in the database for the defined date range. To preserve hand-keyed items for individual resources, use the **Lock** feature on the **Daily Records** screen.

1. Click the **Cost** button to open the **Cost** module

5. From the **Cost Processes** drop-down list in the **Cost** toolbar, select the **Cost Lock/Unlock** option.
6. Click the **Run** button to run the process. A **Daily Cost Lock/Unlock** window displays.



4. Enter the **Start Date** and **End Date** to include in the lock or unlock procedure.
2. If you want to lock the cost records for those dates, click the **Lock** button.

   If you want to unlock the cost records for those dates, click the **Unlock** button.
3. Click the **Close** button to close the **Daily Cost Lock/Unlock** window.
4. When the message displays indicating that your request to run **Cost Lock/Unlock** was completed, click the **OK** button to close the message window.

Cost Rates

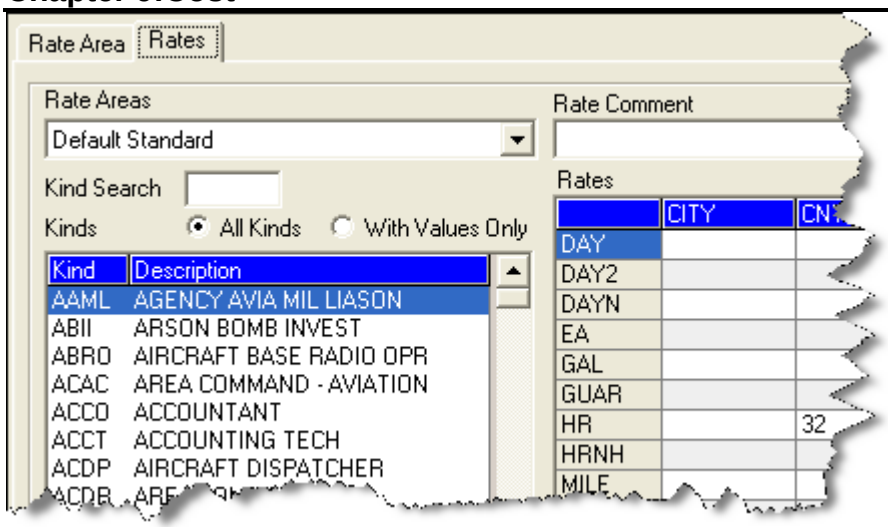
Rates are assigned to kind codes to help determine the cost. Standard rates are included for single resources such as crews, engines, overhead, fallers, pickups, and fuel tenders. The main function of the Rates option is to determine a default rate for a resource kind. You can define numerous types of rates for a number of different kinds of resources.

Cost rates are defined on the **Rate Areas/Rates** window. The application will use the rate from the **Default Standard** rate area for kind codes without a defined rate.

Viewing Default Rates

Follow the steps in this section to view default rates used to calculate costs for specific resources:

1. Click the **Cost** button to open the **Cost** module.
5. From the **Cost** drop-down menu at the top of the window, select the **Rates** option. The **Rate Area/Rate** window displays.
6. Click the **Rates** tab to select it.



4. From the **Rate Areas** drop-down list, select the rate area that you want to view.
2. Click one of the following options to identify the type of kind codes to display under **Kinds**:

- All Kinds

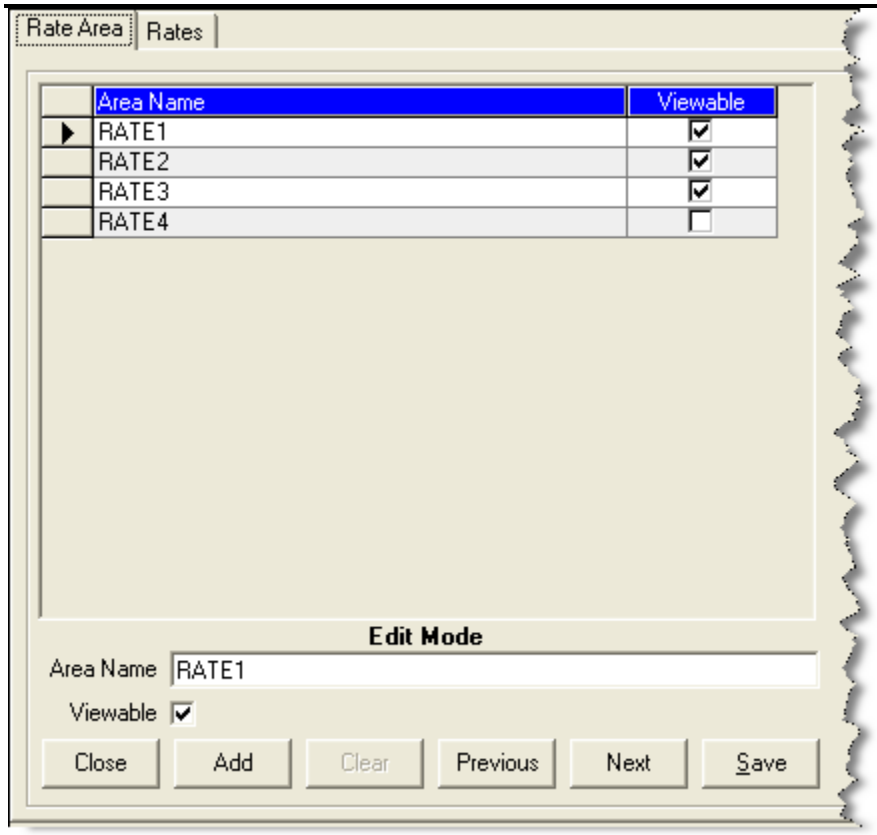
5. With Values Only
6. Under **Kinds,** click the kind code for which you want to view rates. When you click a kind code, the rates for that code display in the **Rates** grid on the right side of the window.

- When you have finished viewing the rates, click the **Close** button to close the **Rate Area/Rates** window.

Creating a New Rate Area

Follow the steps in this section to create a new rate area:

1. Click the **Cost** button to open the **Cost** module.
7. From the **Cost** drop-down menu at the top of the window, select the **Rates** option. The **Rate Area/Rates** window displays.



3. Click the **Add** button that displays at the bottom of the window.
2. In the **Area Name** box, enter the name you want to assign to the rate area.
3. 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.
4. Click the **Save** button to save the new rate area. When the area is saved, it displays in the grid at the top of the window.

Adding Rates to an Area Other Than Default Standard

Follow the steps in this section to add rates to a rate area other than the Default Standard one:

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.

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 main **Cost** window.

1. Click the **Cost** button to open the **Cost** module.

4. From the **Cost** drop-down menu at the top of the window, select the **Rates** option to open the **Rate Area/Rates** window.
5. Click the **Rates** tab to select it.
6. From the **Rates Area** drop-down list, select the rate area for which you want to define rates.
7. Click one of the following options to identify the kind codes to display under **Kinds**:
   - All Kinds
     With Values Only
6. Under **Kinds**, click the kind code for which you want to define rates.

To search for a kind code, enter the code in the **Kind Search** box. The first code that matches your entry is highlighted in the Kind Code list.

7. 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.

Cost Resources

This section explains how to define **Resource** data from the **Cost** module. Keep the following in mind when entering data:

- Entry items located above the tabs (i.e. just below the **Manage Resource – Edit Mode** label) are common to all I-Suite modules.
8. Data entry items for specific modules are located on their respective tabs (i.e. on the **Plans** and **Cost** tabs).
9. Resources is the primary 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.

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.

Editing Resource Data from the Cost Window

Follow these steps to edit resource data from the **Cost** window:

1. Click the **Cost** button to open the **Cost** module.
- In the **Resources** grid, click the Resource you want to edit.
- Click the **Edit** button to open the **Manage Resource - Edit Mode** area at the bottom of the window.

- Review the following information for completeness and accuracy:
- *Request Number
2. *Account Code
3. Person - checked, if applicable
4. Contracted - checked, if applicable
5. *Resource Name, or *Last Name and *First Name (for a person)
6. *Kind/Position

Make sure each resource is identified with the correct Kind Code (e.g. FFT1, CRWB, etc.).

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 estimates at $8,200 for each member into a rollup cost of $164,000.)

- Trainee - checked, if applicable
- *Status
- Unit ID
- Agency

Leave the **Agency Code** blank for **Subordinates of Contract Resources** that do not need to be included in the actual process (e.g. Contract Dozer Operators).

- *Configuration
- Actual Release Date
- Actual Release Time

A label preceded by an asterisk (*) indicates that the information is required.

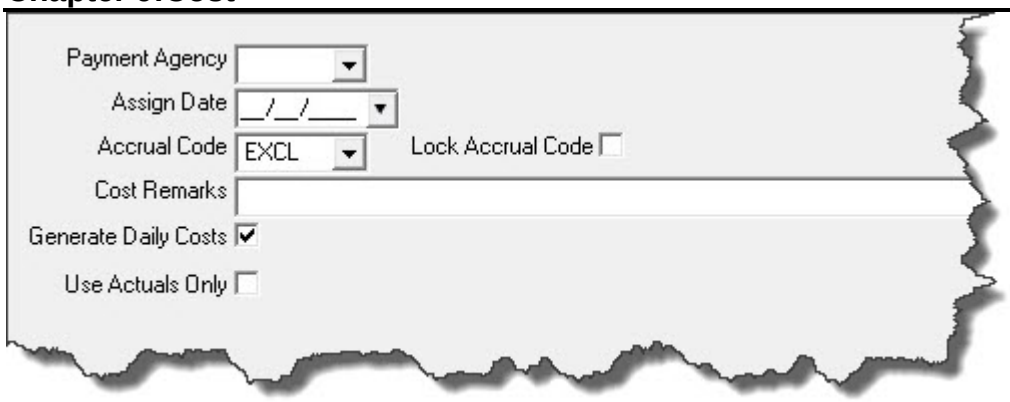
When the **Person** option is checked, **Resource Name** is replaced with **Last Name** and **First Name**.

5. Make the appropriate changes to the data.
- Click the **Save** button to save your changes.

Defining Cost Data

Follow these steps to enter **Cost Data** for a resource:

1. Click the **Cost** button to open the **Cost** module.
6. In the **Resources** grid, click the resource for which you are defining cost data.
7. Click the **Edit** button to open the **Manage Resource - Edit Mode** area at the bottom of the window.
8. Click the **Cost** tab.



5. From the **Payment Agency** drop-down list, select the name of the agency that is actually responsible for payment of the resource. Always use a Payment Agency in cost apportionment situations.

The **Payment Agency** is the agency responsible for payment of the resource. Data entered in this box is also used to determine the **Accrual Code**.

Make sure you always select a **Payment Agency** in **Cost Apportionment** situations.

6. Enter the **Assign Date** to identify when the resource should begin receiving payment. This is the same date as the **Hire Date** for **Contracted Resources** in the **Time** system. You can either type the date or select it from the drop-down calendar.
6. From the **Accrual Code** drop-down list, select the appropriate accrual code for the resource. This code may automatically be selected based on the **Request Number**, **Agency**, **Kind Code**, **Incident State**, **Incident Jurisdiction**, **Payment Agency**, **Unit ID** and whether the **Contracted** option is selected.

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, you want the accrual code to show as **INTL** (International).

8. To prevent the **Cost Accrual Code** from being changed for a resource, click to check the **Lock Accrual Code** checkbox.
7. If needed, you can enter remarks related to the cost data in the **Cost Remarks** box.
8. To generate **Daily Costs** for the resource, click to check the **Generate Daily Costs** checkbox.

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.

For information about when the **Generate Daily Cost**s is automatically turned on, refer to See "Generate Daily Costs".

11. To use **Actual Costs** for the resource, click to check the **Use Actuals Only** checkbox.

If **Use Actuals Only** is checked only Actual Costs will show. All **Cost Estimates** will show as $0.00.

12. Click the **Save** button to save your changes.

Cost Daily Records

This section explains how to view and manage **Daily Records**. The following information is included in this section:

Showing Daily Detail

The **Daily Detail** record contains information about a single day's activity and its cost relation to the incident. 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 are included in the **Manage Cost** grid, which displays at the bottom of the window when you click the **Show Cost** button. The system creates Daily records for a resource from the time the resource is **Checked-In** to the **Current Date**.

For Crew Resources, the **Daily** record is only created if the **Generate Daily Costs** option is turned ON for the **Checked-In** parent resource. For example, if the **Generate Daily Costs** option is turned OFF for the **Parent Crew Record**, it is turned OFF for **ALL** of the **Crew Members**. To turn **Generate Daily Costs** ON, check the **Generate Daily Costs** checkbox on the **Cost** tab in Manage Resources.

For information about when the **Generate Daily Costs** is automatically turned on, refer to See "Generate Daily Costs".

The Cost module uses either the **Check-In Date** or the **Assign Date**, whichever is earlier, to generate costs.

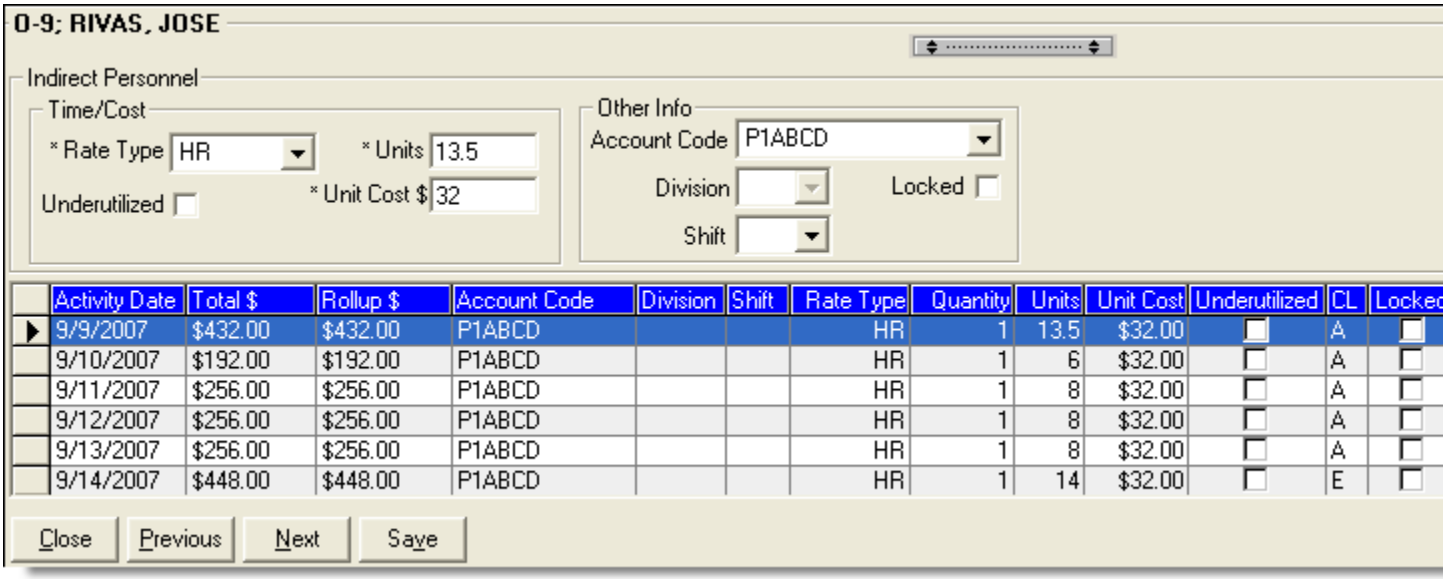
The Daily record that is generated only contains an estimate and is based on the **Rates**, **Agency** and **Kind** that are defined. If you know the actual rate for a resource, you may replace the estimate with the actual rate for that resource. If the **Time** module contains actual time and you select the **Update Actuals** process, the application enters the actual time and costs.

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.

Follow the steps in this section to display the **Manage Cost Grid** at the bottom of the **Cost** window:

1. Click the **Cost** button to open the **Cost** module.
12. In the **Resources** grid, click the resource for which you want to view the **Daily Detail**.
13. Click the **Show Cost** button to open the **Manage Cost** grid at the bottom of the window.



4. Click a date listed in the grid at the bottom of the window to display the **Daily Detail** for that date. The **Daily Detail** displays above the **Manage Cost** grid.

You can sort the data in the Manage Cost grid by clicking the column headings in the grid.

Cost Level Data

When you click the **Show Costs** button, a **CL** (Cost Level) column displays in the **Manage Cost** grid at the bottom window. This column identifies the source of the Cost Data. There are three types of cost level data:

- E = Estimate
5. A = Actual
6. U = User Updated or Flow Down from Actual

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.

Updating Estimated Cost Level

Follow these steps to update the **E (Estimate)** cost level data.

Estimate (**E**) cost level is estimated from the **Rates** table.

1. Select a resource that has no actual time posted.
2. Click the **Show Cost** button to display the **Manage Cost** grid at the bottom of the window.
2. Notice that the posted time in the **Manage Cost** grid displays as **Estimate** (**E**) under the **CL** column.

Updating Actual Cost Level

Follow these steps to update the **A (Actual)** cost level data.

Actual (**A**) cost level data comes from the **Time** module.

1. In the **Time** module, post time for the specified resource.
3. In the **Cost** module, select the **Update with Actuals** options from the **Cost Processes** drop-down list. Then click the **Run** button.
4. Click the **Show Cost** button to display the **Manage Cost** grid at the bottom of the window.
5. In the **Resources** grid, click the resource for which you just posted time. Notice that the posted time in the **Manage Cost** grid displays as Actual Time (**A**) under the **CL** column.

Updating Cost Manually

Follow these steps to manually update the cost data:

When cost level data is manually updated by a user (**U**), the information most likely comes from contract data.

1. Click the **Show Cost** button to open the **Manage Cost** grid.
2. In the **Resources** grid, click the resource you want to update.
3. In the **Manage Cost** grid, click the **Daily Cost** record you want to update.
4. Make the appropriate changes to the **Unit** or **Unit Cost**.
5. Click the **Save** button. Notice that the entry under the **CL** column changes to **U** (**User Updated**).

Using Flow Down

A **Flow Down** function is available that allows you to change the **Unit Cost**, **Units**, **Rate Type** or **Division** in multiple Daily Cost records at the same time.

The **Flow Down** changes all entries from the selected date forward, except for **Locked** entries See "Locking a Daily Cost Entry".

You can turn off the **Flow Down** option by unchecking the **Flow Down** checkbox.

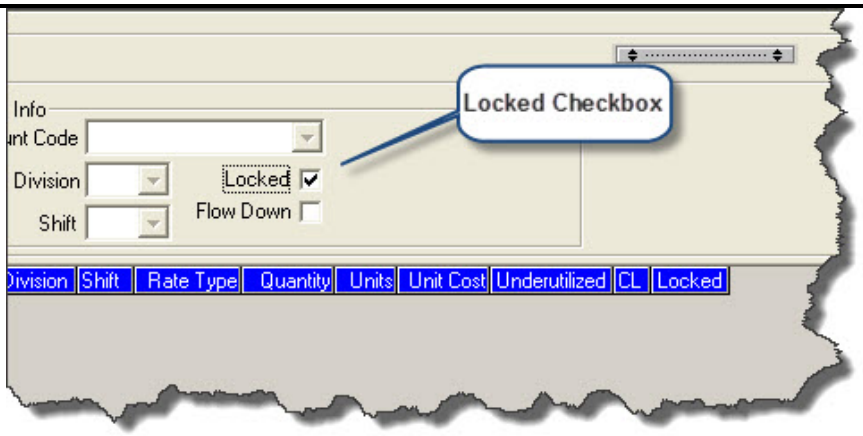
Follow the steps in this section to use the **Flow Down** option:

1. Click the **Cost** button to open the **Cost** module.
2. In the **Resources** grid, click the appropriate resource.
3. Click the **Show Cost** button to display the Manage Cost grid at the bottom of the window.
4. Click to check the **Flow Down** checkbox in the **Manage Cost** grid at the bottom of the window.
5. Click the date for the entry you want to edit.
6. Change the **Unit Cost**, **Units**, **Rate Type** or **Division** entries. The entry is changed for all dates from the selected date forward.
7. Click the **Save** button

Locking a Daily Cost Entry

The **Lock** feature is a valuable feature for **Cost** to preserve hand-keyed data entries. Follow the steps in this section to lock a **Daily Cost** entry:

1. Click the **Cost** button to open the **Cost** module.
2. In the **Resources** grid, click the appropriate resource.
3. Click the **Show Cost** button to display the **Manage Cost** grid at the bottom of the window.
4. In the **Manage Cost** grid, click the date for the entry you want to lock.
5. Click the **Locked** option that displays in the detail area just above the **Manage Cost** grid.



6. Click the **Save** button. Notice that the **Lock** checkbox is now checked for that entry in the **Manage Cost** grid, and you can no longer edit the data in the record.

To unlock a locked entry, click to uncheck the **Locked** checkbox and then click the **Save** button. You can then edit the cost detail for that date.

Assigning an Actual Release Date

When you assign an actual release date to a resource, the application stops generating Daily Cost records for that resource.

A **Demobed Resource** continues to generate costs until a **Actual Release Date** is defined.

Follow the steps in this section to assign an **Actual Release Date** to the resource:

1. In the **Resources** grid, click the resource that is being released.
7. Click the **Edit** button to open the **Manage Resources - Edit** window.
8. In the **Actual Release Date** box, type the actual release date for the resource.

Identify the last date of actual time for the resource, and then type that last date as the **Actual Release Date**.

Coordinate with the **Time Unit** to determine the **Actual Release Date**.

4. Click the **Save** button to save your changes.
2. Open the **Cost** module. Notice that Daily records for the edited Resource no longer display beyond the Actual Release Date.

Cost Reports

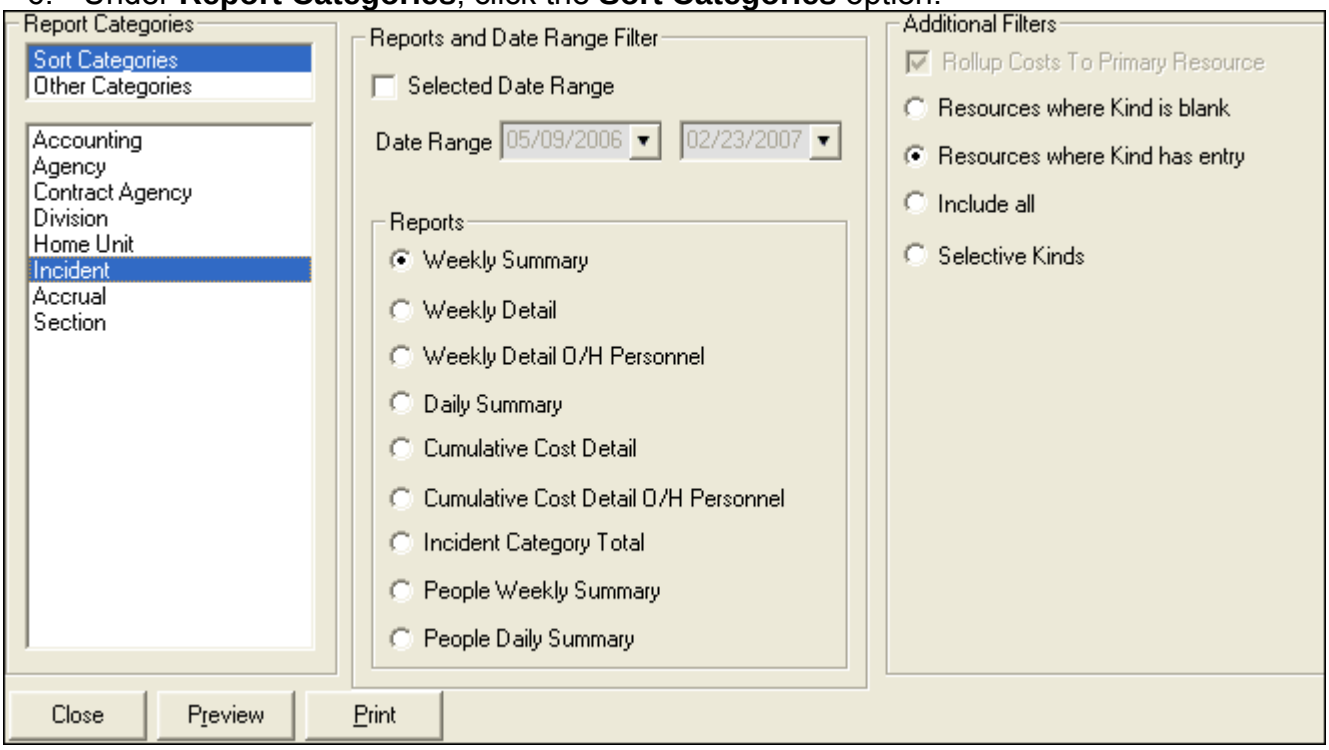
This section explains how to run and print standard **Cost Reports**.

Printing Standard Cost Reports

The **Cost** module allows users to run a number of pre-designed 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 report data.

Follow the steps in this section to print **Standard Cost Reports**:

1. Click the **Cost** button to open the **Cost** module.
5. Click the **Reports** button to open the **Cost Reports** window.
6. Under **Report Categories**, click the **Sort Categories** option.



4. In the area **beneath Report Categories**, click to select one of the following reports:

- Accounting
5. Agency
6. Payment Agency
7. Division
8. Home Unit
9. Incident
10. Accrual
11. Section

5. To define a range of dates to include in the report, click the **Selected Date Range** option. Then enter the **Date Range**.

If you do not click the Selected Date Range checkbox and define a date range, the report defaults to the entire date range.

6. Under **Reports**, click the type of report you want to create. The following options are available:

- **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.

7. **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.
8. **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.
9. **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**.
10. **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**.
11. **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**.
12. **Category Total** - This report identifies cost totals based on the **Category**.

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**.

- **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.
- **People Daily Summary** - This report contains a summary of the people working on the incident for the current 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** check box in the **Additional Filters** frame.

- In the **Additional Filters** frame, click any of the additional filters you want to use in generating the report. The options available in this area are based on the report you are printing.

9. To preview the report, click the **Preview** button. To print the report, click the **Print** button.

8. When you are finished, click the **Close** button to close the **Select Reports** window.

Printing Other Cost Reports

Follow the steps in this section to print Other Cost Reports:

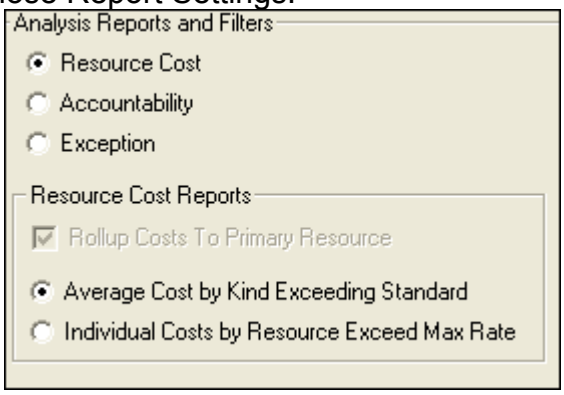
1. Click the **Cost** button to open the **Cost** module.
10. Click the **Reports** button to open the **Cost Reports** window.
11. Under **Report Categories**, click the **Other Categories** option.
12. In the area **beneath Report Categories**, click to select one of the following reports:

- Analysis See "Printing an Analysis Report"
2. Acres/NVC See "Printing an Acres/NVC Report"
3. Aircraft See "Printing an Aircraft Report"
4. Cost Share See "Printing a Cost Share Report"
5. Resource/Kind See "Resource Kind Report"
6. Underutilized See "Printing an Underutilized Report"

Printing an Analysis Report

Follow these steps to print an Analysis report:

1. On the **Cost Reports** window, click **Other Categories**. Then click the **Analysis** option to display those Report Settings:



2. Under **Analysis Reports and Filters**, click one of the following options to identify the type of Analysis Report to create:

- **Resource Cost** - This report identifies the average cost by Kind that exceeds the standard cost. It also identifies the individual costs by resource that exceeds the maximum rate.
3. **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.

4. **Exception** - This report identifies resources with actual time posted that also have three or more days of unposted time.
3. Under **Resource Cost Reports**, click one of the following options to further filter the information in the report:

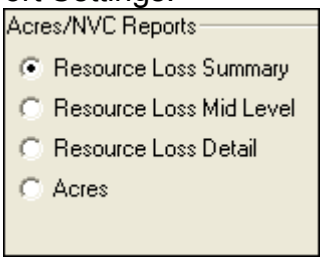
- Average Cost by Kind Exceeding Standard

4. Individual Costs by Resource Exceed Maximum Rate
4. Click the **Preview** button to view the report. Click the **Print** button to print the report.

Printing an Acres/NVC Report

Follow these steps to print an Acres/NVC Report:

1. On the **Cost Reports** window, click **Other Categories**. Then click the **Acres/NVC** option to display those Report Settings.



2. Click one of the following options to identify the information to include in the report:

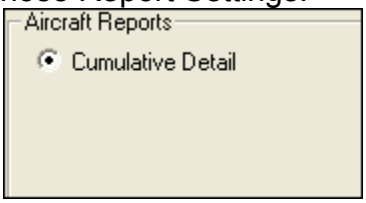
- **Resource Loss Summary** - This report contains a high level view of the acres that were lost and the Net Value Change (NVC) resources that were affected. The information in this report is based on values defined on the **Acres Burned NVC/FIL** window.

3. **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.
4. **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.
5. **Acres Burned** - This report contains the information that was defined on the **Acres Burned** window.
3. Click the **Preview** button to view the report. Click the **Print** button to print the report.

Printing an Aircraft Report

This report identifies the air costs based on those resources that were assigned **Air kind codes** (i.e. AT) Follow these steps to print an Aircraft Report:

1. On the **Cost Reports** window, click **Other Categories**. Then click the **Aircraft Report** option to display those Report Settings.

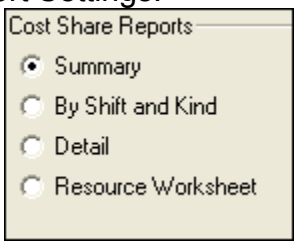


2. Click the **Preview** button to view the report. Click the **Print** button to print the report.

Printing a Cost Share Report

Follow these steps to print a Cost Share Report:

1. On the **Cost Reports** window, click **Other Categories**. Then click the **Cost Share** option to display those Report Settings.



2. Click one of the following options to identify the information to include in the report:

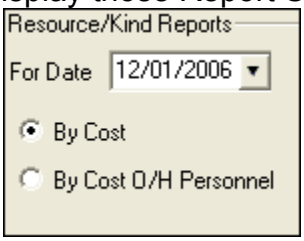
- **Summary** - This report identifies the **Daily Cost** for the **Shift** on the listed dates. It also identifies the **Federal**, **State**, and **Other** percentage of the cost obligations for the **Shift** on the listed dates.

3. **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.
4. **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**.
5. **Resource Worksheet** - This report contains **Cost Apportionment** information for listed Resources. This information includes **Daily Cost**, **Federal Cost**, **State Cost**, and **Other Cost**.
3. Click the **Preview** button to view the report. Click the **Print** button to print the report.

Resource Kind Report

This report identifies cost information based on either **Kind** and **Resource codes** or **Overhead Personnel Resources**. Follow these steps to print a Resource Kind Report:

1. On the **Cost Reports** window, click **Other Categories**. Then click the **Resource/Kind** option to display those Report Settings.

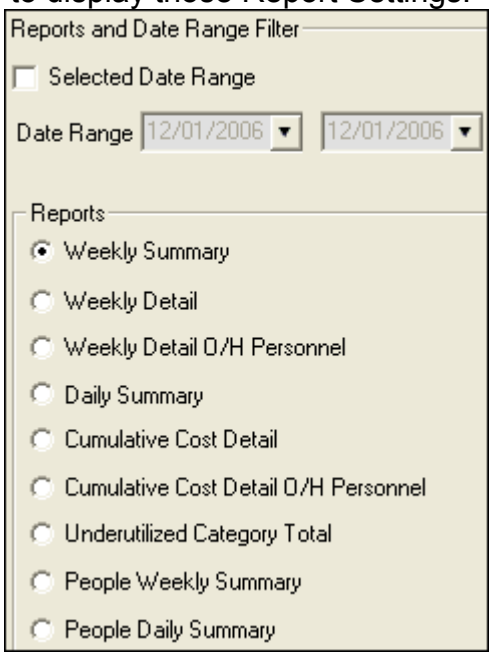


2. Enter the **For Date** to include in the report.
2. To include information by cost, click the **By Cost** option. To include information by overhead personnel cost, click the **By Cost O/H Personnel** option.
3. Click the **Preview** button to view the report. Click the **Print** button to print the report.

Printing an Underutilized Report

This report lists any resources that were checked as **Underutilized** on the **Daily Records** screen. Follow these steps to print an Underutilized report:

1. On the **Cost Reports** window, click **Other Categories**. Then click the **Underutilized** option to display those Report Settings.

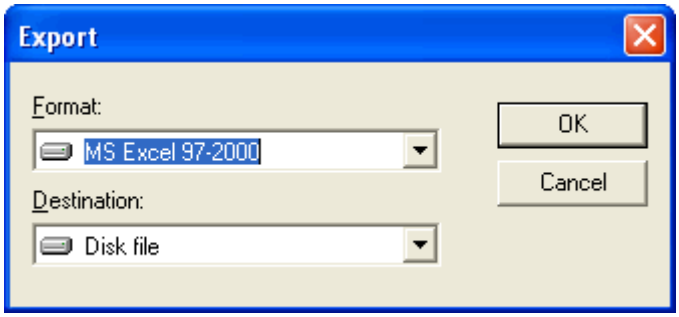


2. If appropriate, click to check the **Selected Date Range** checkbox. Then enter the **Date Range** to include in the report.
2. Click one of the following options to identify the information to include in the report:
- Weekly Summary
3. Weekly Detail
4. Weekly Detail O/H Personnel
5. Daily Summary
6. Cumulative Cost Detail
7. Cumulative Cost Detail O/H Personnel
8. Underutilized Category Total
9. People Weekly Summary
10. People Daily Summary
11. Click the **Preview** button to view the report. Click the **Print** button to print the report.
- When you have finished printing reports, click the **Close** button to close the **Select Reports** window.

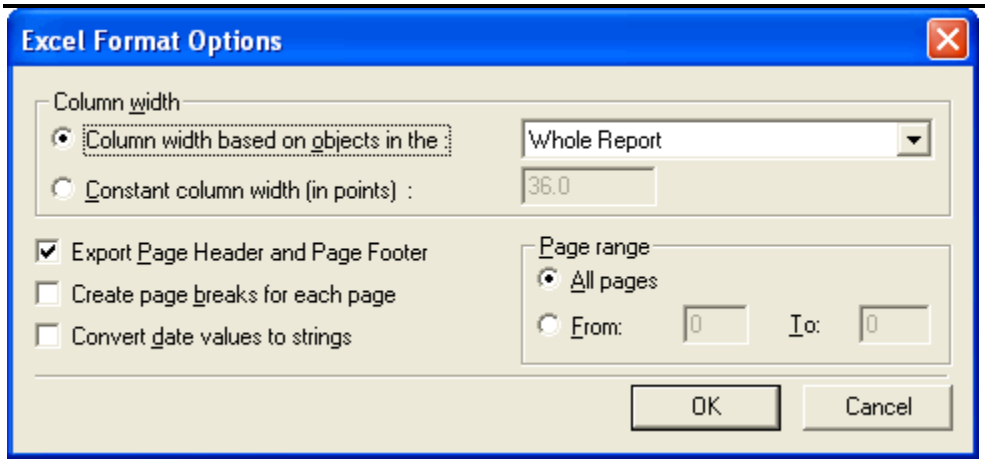
Exporting a Report to Excel

In **Cost**, you can export report data to **Word**, **Excel**, **PDF**, or **TXT**. Follow the instructions in this section to export a report to **Excel**. The same principles apply to exporting reports to other formats.

1. In the **Cost Reports** window, **Preview** the report you want to export.
12. Click the **Export Report** button on the Preview window to open the **Export** window.



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)**.
4. To include the **Page Header and Page Footer**, click to check this checkbox.
5. To **Create page breaks for each page**, click to check this checkbox.
6. To **Convert data values to strings**, click to check this checkbox.
7. You can include **All pages** in the report or define a page range in the **From** and **To** boxes
8. Click the **OK** button to export the report. A **Select Export File** window displays.
9. From the **Save in** drop-down list, select the directory where you want to save the **Excel** file.
10. In the **File name** box, enter the name you want to assign to the **Excel** file.
11. Click the **Save** button to export the file.
12. Open the report in **Excel**.

Once you save a file in Excel, you can use Excel to create charts and graphs as appropriate for you reporting needs.

Acres Burned

Acres Burned is an additional tool that can be used to do the following:

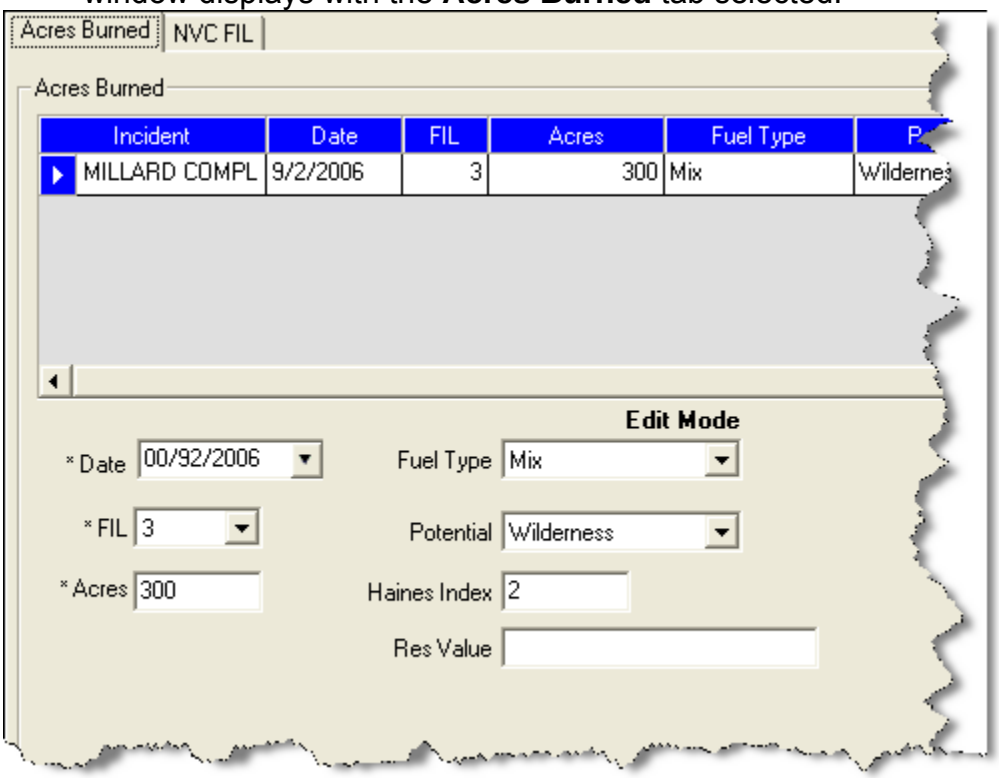
- Calculate the dollar loss for various types of predefined resources. When using this option you would insert acres burned records for each day on the incident (just the new acres, not the total).
5. Estimate the Net Value Change (NVC), which is derived from the number of acres burned, the Fire Intensity Level (FIL) of the acres burned, and the NVC categories affected.

Defining Acres Burned

Follow the instructions in this section to define **Acres Burned**:

1. Click the **Cost** button to open the **Cost** module.

- From the **Cost** menu, select the **Acres Burned** option. The **Acres Burned** window displays with the **Acres Burned** tab selected.



3. Enter the appropriate **Date**.
2. From the **FIL** drop-down list, select the **Fuel Intensity Level**. The levels that are available are defined on the **NVC FIL** tab.
3. In the **Acres** box, enter the number of acres burned.
4. From the **Fuel Type** drop-down list, select the type of fuel burned. The available options include **Grass**, **Timber**, **Mix**, or **High Dead**.
5. From the **Potential** drop-down list, select the location of acreage. The available options include **Urban**, **Wilderness**, or **Other**.
6. Enter the **Haines Index** value for the fire. The Haines Index is an atmospheric index used to identify the potential for wildfire growth by measuring the stability and dryness of the air over a fire.
7. In the **Res Value** box, enter the appropriate resource value.
8. Click the **Save** button to save the record. When you save an Acres Burned record, it displays in the grid at the top of the **Acres Burned** window.

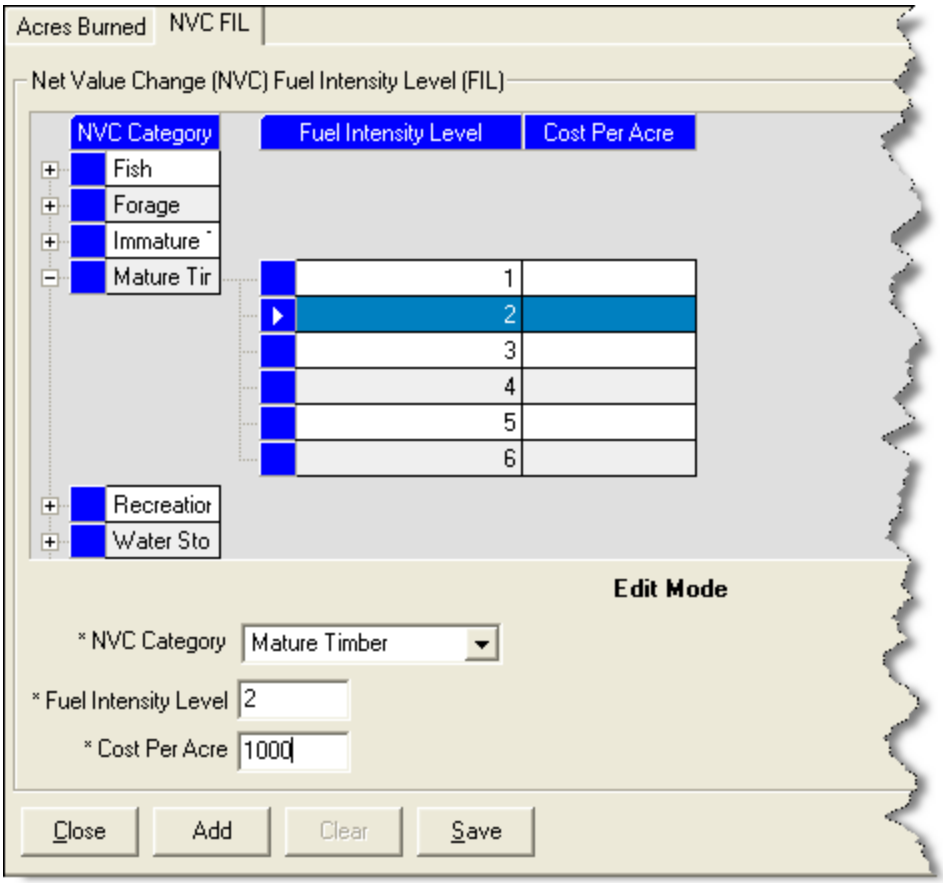
Defining NVC FIL

Follow the steps in this section to estimate the **Net Value Changed** (NVC) and define the **Fuel Intensity Level** (FIL).

The **Net Value Changed** (NVC) estimate is derived from the number of acres burned, the fire intensity level of the acres burned, and the NVC categories that are affected.

The information that you define on the **NVC FIL** tab represents the cost per acre for each **NVC Category** for each **Fire Intensity Level** (FIL). Normally, as the FIL increases, the cost per acre increases. By default, the **Cost Per Acres** is left blank, because this value differs greatly from one area to the next. You will need to obtain these values from the area where the incident occurs. The reports for this section of Cost only include categories with a **Cost Per Acre** value.

1. Click the **Cost** button to open the **Cost** module.
4. From the **Cost** menu, select the **Acres Burned** option.
5. Click the **NVC FIL** tab on the **Acres Burned** window.

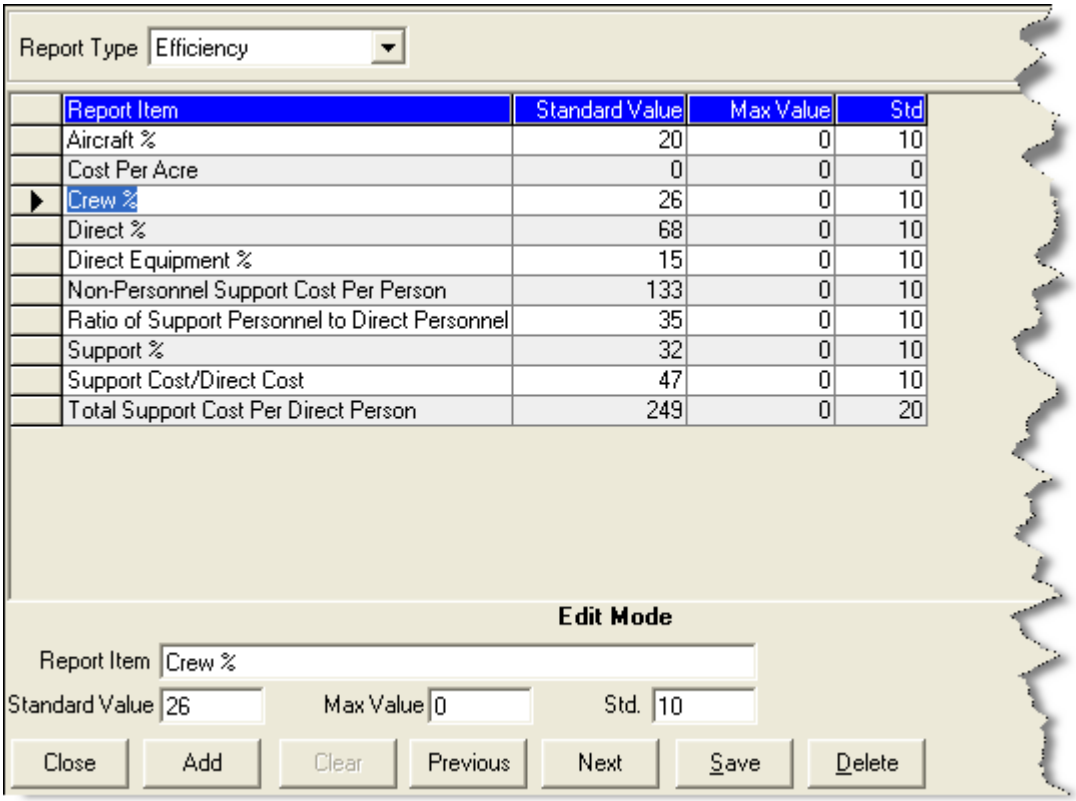


4. From the **NVC Category** drop-down list, select the appropriate **Net Value Change** option.
2. Enter the appropriate **Fuel Intensity Level**.
3. Enter the appropriate **Cost Per Acre**.
4. Click the **Save** button.

Cost Analysis/Benchmark Report Setup

Follow the steps in this section to setup the data to use in the **Cost Analysis Report** you can print on the **Cost Report** window.

1. Click the **Cost** button to open the **Cost** module.
5. From the **Cost** menu, select the **Cost Analysis Benchmark Setup** option to open that window.



3. From the **Report Type** drop-down list at the top of the window, select the appropriate report type. Available options include **Efficiency** and **Resource Cost**.
2. Enter the **Report Item** name.
3. Enter the **Standard Value** for the report.
4. Enter the maximum value allowed in the **Max Value** box.
5. Enter the standard deviation in the **Std** field.
6. Click the **Save** button to save the values.

Cost Graphs

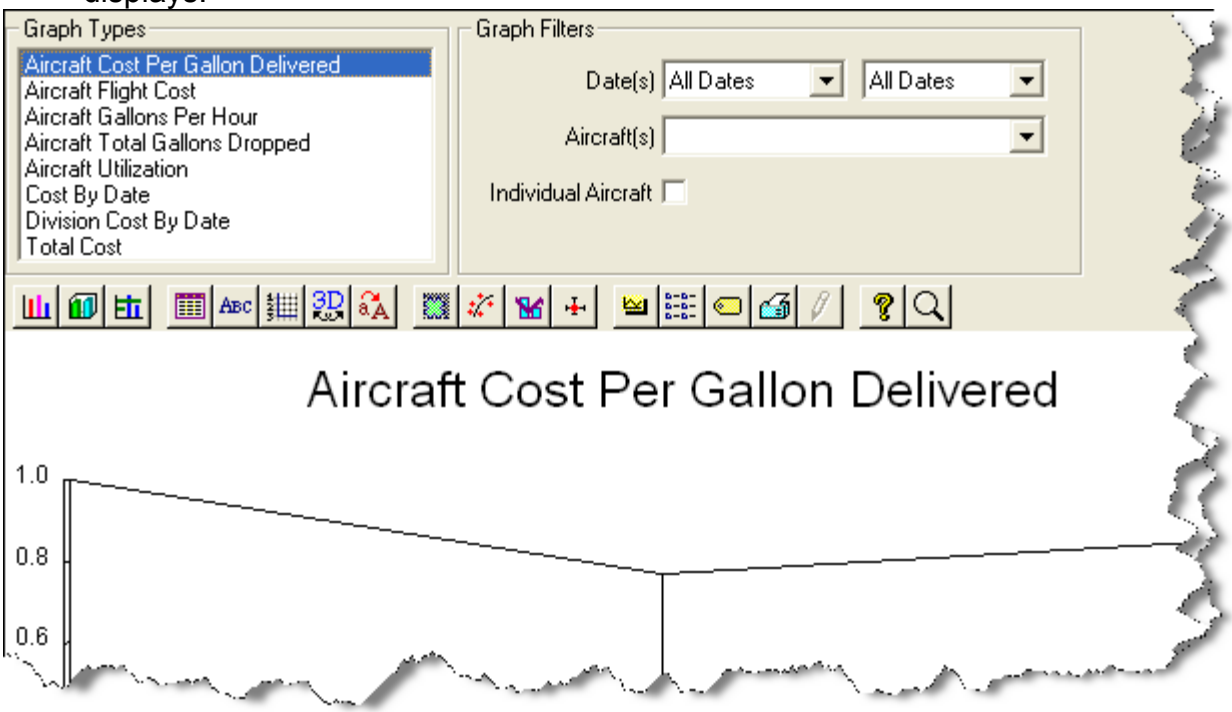
This section explains how to generate and customize **Cost** graphs.

Generating Pre-Designed Cost Graphs

The **Cost** module allows users to produce a number of pre-designed graphs for management decision-making purposes. You can select a general format and then modify the graphs display for presentation. Cost graphing offers several standard graphs.

Follow the instructions in this section to generate a pre-designed cost graph:

1. Click the **Cost** button to open the **Cost** module.
4. From the **Cost** menu, select the **Graphs** option. The **Cost Graphs** window displays.



3. Under **Graph Types**, click the graph that you want to generate. The following pre-designed graphs are available:

- Aircraft Cost Per Gallon Delivered

4. Aircraft Flight Cost
5. Aircraft Gallons Per Hour
6. Aircraft Total Gallons Dropped
7. Aircraft Utilization
8. Cost By Date
9. Division Cost By Date
10. Total Cost

4. Complete the information in the **Graph Filters** area based on the type of graph you selected:

- Complete the following steps if you selected the **Aircraft Cost Per Gallon Delivered**, **Aircraft Gallons Per Hour**, **Aircraft Total Gallons Dropped** or **Aircraft Utilization** graphs:

a. Enter the **Date(s)** to include in the graph.

- From the **Aircraft(s)** drop-down list, select the aircraft to include in the graph.
- To include an individual aircraft, click to check the **Individual Aircraft** checkbox.
- When generating an **Aircraft Flight Cost** graph, click to check the **Individual Aircraft** checkbox to include an individual aircraft in the graph. To include all aircrafts, uncheck the **Individual Aircraft** checkbox.

b. When generating a **Cost By Date** graph, enter the **Date(s)** to include.

c. When generating a **Division Cost By Date** graph, enter the **Date(s)** to include. Then select the appropriate division from the **Division(s)** drop-down list.

d. When generating a **Total Cost** graph, you do not have to define any additional information.

5. When you have finished viewing the graphs, click the **Close** button to close the window.

Buttons for Customizing Cost Graphs

You can create custom cost graphs by using the graph buttons to alter the existing graphs. The following is a list of the graph buttons you can use to customize a graph:

- **2D Gallery Button** - Click the **2D Gallery** button to select a two dimensional look for the graph.

6. **3D Gallery Button** - Click the **3D Gallery** button to select a three dimensional look for the graph.
7. **Style Button** - Click the **Styles** button to change the style of the call-outs for the graph. For example, you could click the **Colored As Slices** option to color the call-out text the same as the slices are colored in the Pie chart.
8. **Data Button** - Click the **Data** button to change the appearance of the graph's data. For example, you could click the **Exploded Slices** button on the **Data** tab to change the pie slice values to **1** for each field.
9. **Titles Button** - Click the **Titles** button to change any graph titles.
10. **Axis Button** - Click the **Axis** button to change the settings for the graph's X or Y axis.
11. **3D Button** - Click the **3D** button to adjust the settings for a 3 dimensional graph. For example, you could change the 3D appearance of the pie chart by tilting it down and changing the depth.
12. **Font Button** - Click the **Fonts** button to change the font used in the graph. For example, you could underline and italicize the title.

13. **Markers Button** - Click the **Markers** button to change the appearance of the graph's markers. For example, you can change the pattern of each slice included in the Pie chart.
14. **Trends Button** - Click the **Trends** button to include Trend lines in the graph. For example, you can include a Mean line which is drawn horizontally through the average value of all data points in a set.
15. **Overlay Button** - Click the **Overlay** button to create a second "Overlay" graph with the same X axis as the primary graph.
16. **Error Bar Button** - Click the **Error Bar** button to add and configure an error bar for a graph.
17. **Background Button** - Click the **Background** button to change the background color for the graph.
18. **Legend Button** - Click the **Legend** button to add and configure a legend for the graph.
19. **Label Button** - Click the **Labels** button to edit the labels for the graph. For example, you can select the **Text Array** option on the **Labels** tab to define text labels. After you select **Text Array,** you will need to click the **Label Text** button to define the text for the labels.
20. **System Button** - Click the **System** button to define export and print options for the graph. For example, you could export the image as a **WMF** file and print the graph in a **Landscape** format with **Color**.

    To save the graph as a template, click the **System** button. In the **Graph Template** frame, click the **Browse** button to browse to the **File** where you want to save the template. Then enter a **Name** for the template. Click the **Save** button to save the template.

The system will add the ".gsp" extension to the template name.
You can store multiple templates in a graph file. When you are creating a template, do not check **Save Data**.

Cost Accruals

This section explains the purpose and use of **Cost Accruals**.

Guidelines for US Forest Service accruals

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.

Providing a **Daily Accrual Summary** report to a **Host Forest** or the **National Forest Service** payment center is a Requirement.

Reportable US Forest Service Accrual Categories

Sixty-three separate accrual categories are available to Cost users, but only the following sixty-two accrual categories are reportable:

- **AD**: Casual hires
- **AMD**: Aviation Management Directorate aircraft
- **CONT**: All non-air contracts
- **INTL**: International
- **NOAA**: National Weather Service personnel.
- **States**: All fifty states plus District of Columbia, Guam, Puerto Rico, Saipan, Midway, Samoa and the Virgin Islands are reportable.
-

Accrual categories refer to a specific **RC** line number in the **FS** financial system. This line number displays on the **Accrual Summary Report**.

Additional accrual categories that are NOT included in the extract are as follows:

- **EXCL** - Exclude

The **Incident Jurisdiction** defined for an Incident in Data Admin facilitates cost accrual category decisions.

To adjust an Accrual Code, add the appropriate Payment Agency that is paying for the resource. (e.g., If you are on a **BLM** incident, add **BLM** to the **Payment Agency** box for **PVT** resources. This adjusts the **Accrual Code** to **FED**.)

Items of Note for Accruals

- The two digit Fiscal Year is appended to the accounting code for accruals in the Accrual Summary Report, Detail Report, and Financial Export.
- The new Fiscal Year starts on October 1 each year.
- Accruals start at $0.00 at the start of the new Fiscal Year.
- Incidents being managed in only one Fiscal Year will include financial data for just that Fiscal Year.

- Accrual reports include:
  - a sub-total for each accounting code
  - a total for each incident in the database
  - a grand total for all incidents in the database
  - totals by the accrual accounting code with the Fiscal Year appended

Accrual Reports will not include totals by Fiscal Year. It only provides totals by the accrual accounting code with the Fiscal Year appended to the accounting code.

  - 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.
  - The OF-288 and OF-286 invoices will not show the appended Fiscal Year with the accounting code.

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 PBM32407 was typed into I-Suite, it will be PBM3240707 for the 2007 Fiscal Year and PBM32400708 for the 2008 Fiscal Year.

- 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.
  - For an AD Draw 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.)

- An Original OF-288 must be printed.
- After the OF-288 is printed, accruals must be extracted and finalized.
- After accruals are extracted and finalized, a Financial Export file must be created.
- 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 Draw Down will show in this export file.

Accruals can only be finalized once per day and the financial export can only be created once per day.

AD Draw Downs use the total invoiced amount prior to deductions shown in Block 22 on the Commissary Record for the OF-288 Invoice.

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 Drawn 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).

- The AD Drawn 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.

7. 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.
8. The AD Drawn Down will occur in the new Fiscal Year when on the Original OF-288 invoice span both Fiscal Years. When this occurs, the entire invoiced amount will be drawn down in the new Fiscal Year.

If the AD Drawn 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.

- 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.

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.

Defining Accounting Codes

Follow the steps in this section to add or edit an Accounting Code:

1. From the **Modules** drop-down menu, select the **Data Admin** option to open the **Data Admin** window.

- On the **Incident Data** tab, click the **Accounting Code** option under **Feature**.
- To add an **Accounting Code**, click the **Add** button.
- From the **Incident Name** drop down list, select the appropriate **Incident Name**.
- From the **Agency Code** drop down list, select the appropriate **Agency Code**.
- Enter the new **Accounting Code** for the incident
- 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.
- Click the **Save** button to save the accounting code.
- When finished, click the **Close** button.

Follow the steps in this section to assign an Accrual Override Code to include resources:

1. Open **Data Admin**. Make sure the **Incident Data** tab is selected.
2. Under **Feature**, click to select **Accounting Codes**.

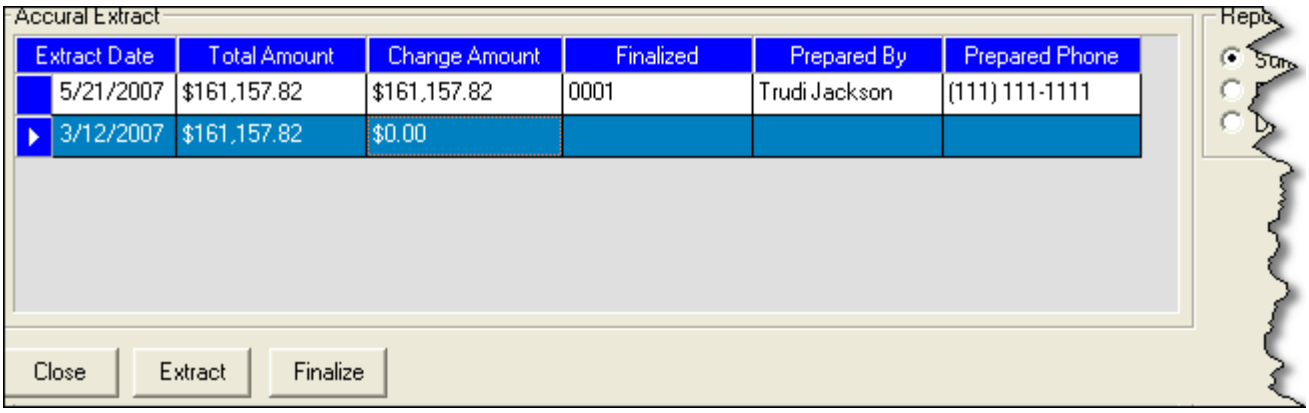
3. In the **Accounting Codes** grid, click to select the **Accounting Code** to which you want to assign an **Accrual Override Code**.
4. From the **Accrual Override Code** drop-down list, select the **Accrual Override Code** you want to assign to the **Accounting Code**.
5. To save your changes, click the **Save** button.
6. When finished, click the **Close** button.

Creating an Accrual Extract

Follow the steps in this section to create an Accrual Extract.

Once resources have been assigned an **Accrual Code**, users can run an extract to capture **Accrual Amounts** assigned to each category.

1. Click the **Cost** button to open the **Cost** module.
2. From the **Cost** menu, select the **Accruals** option to open the Accrual Extract window.



3. Click the **Extract** button at the bottom of the **Accruals** window. The extract displays in the **Accrual Extract** grid at the top of the window.

Printing an Accrual Extract

Follow the steps in this section to print an accrual extract:

1. Click the **Cost** button to open the **Cost** module.
4. From the **Cost** menu, select **Accruals** to open the **Accrual Extract** window.
5. Click the **Accrual Extract** you want to include in the report.
6. Under **Reports**, click the report you want to print.
7. To preview the report and then print it, click the **Preview** button. When the **Preview** window opens, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.

8. When the **Print** window displays, click the **Print** button.

Finalizing an Accrual Extract

Follow the steps in this section to finalize an accrual extract:

1. Click the **Cost** button to open the **Cost** module.
2. From the **Cost** drop-down menu, select **Accruals** to open the **Accrual Extract** window.
3. Click the extract you want to finalize in the **Accrual Extract** grid.
4. Click the **Finalize** button. An **Accrual Finalize** window displays.
5. Enter the **Prepared By Name**.
6. Enter the **Prepared By Phone**.
7. Click the **OK** button.
8. When the message window displays indicating that the accruals were finalized, click the **OK** button to close the window.

A sequential number is posted to each accrual after it is Finalized (e.g. 0001).

9. Under **Reports**, click to select the appropriate report, and then click the **Print** button.

Accrual information is now ready to include in the Financial Export.

Cost Projections

This section explains the purpose and use of **Cost Projections**.

Guidelines for Cost Projections

A **Cost** user may be asked by the **Finance Section Chief**, or other command staff, for a **Cost Projection**. 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.

Use the **Cost Projections** option in the **Cost** module to select and manipulate data to generate 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:

$$\frac{\text{Current Day Total Support Cost}}{\text{Current Day Total } \textit{Direct} \text{ Personnel}} \times \text{Future Day } \textit{Direct} \text{ Personnel}$$

Use the **Update** function in Cost Projections to:

- increase or decrease the number of days for a projection.
10. apply current day's costs to a previous day's specifications.

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.

Creating a Cost Projection

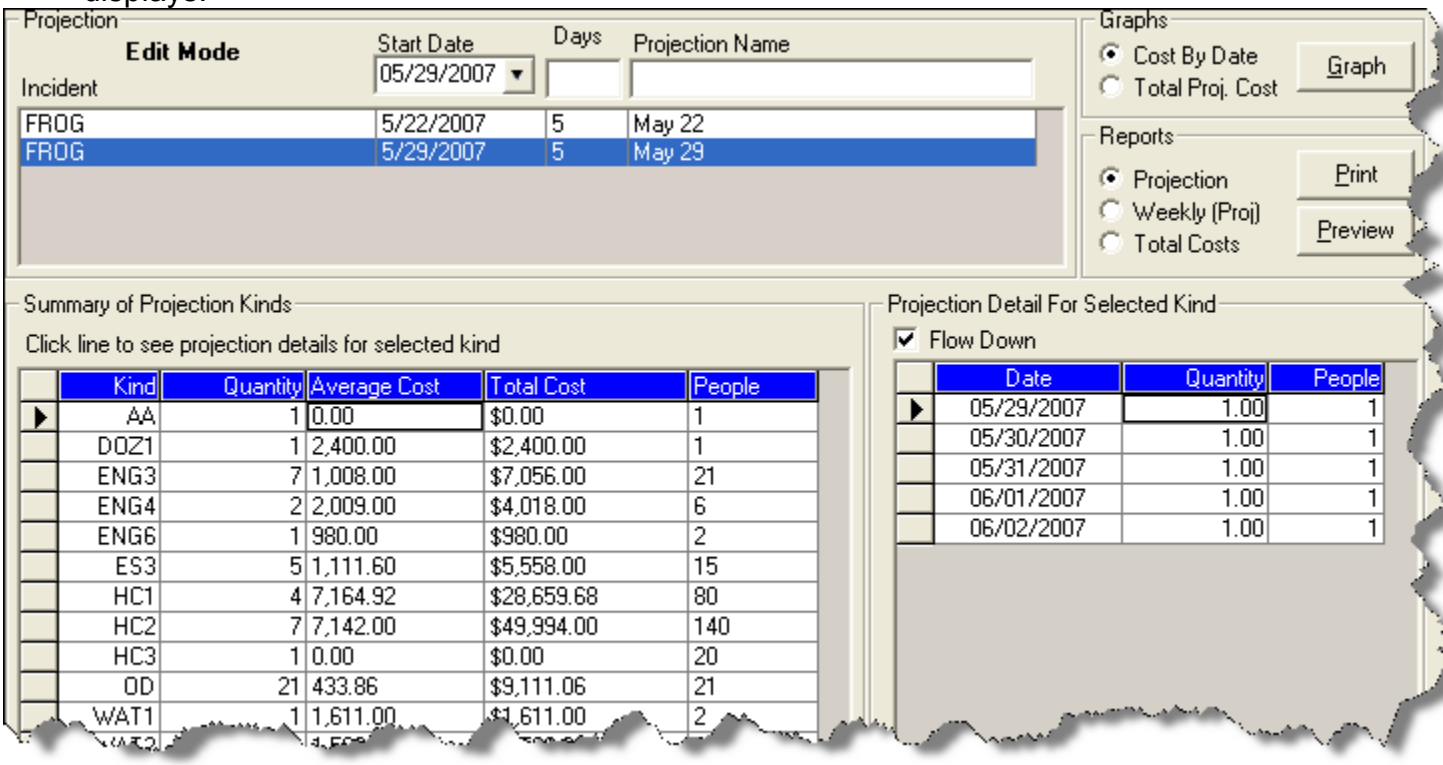
Follow the steps in this section to create a **Cost Projection**:

When in **Single Incident** mode, only data for that incident is used in the projection. When in **Manage All as One** mode, all incident data is used in the projection.

1. Click the **Cost** button to open the **Cost** module.

To ensure that your data is current, make sure you run the **Create Daily** process before proceeding with the remaining steps.

2. From the **Cost** menu, select the **Projections** option. The **Projections** window displays.



3. From the **Incident** drop-down list on the top-right side of the window, select the appropriate incident.

3. Make sure the correct **Start Date** is defined.

When you access the **Projections** window, 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. In the **Days** box, enter the total number of days to include in the projection.
4. Enter the **Projection Name**.
5. Click the **Save** button to create the projection.

   When you create the projection, the system automatically inserts the projection information into the **Summary of Projection Kinds** grid. This grid contains a sum of all **Direct Kind** types that are currently being used for the incident. It includes their **Quantity**, **Average Cost**, **Total Cost**, and the **Total Number of People** on the incident for those direct resources. The values inserted into this grid are generated when the projection in the header record is first created.

The only information in the **Summary of Projection Kinds** grid that you can edit is the **Average Cost**. Make changes to the entries in this column if you do not believe that the average cost generated by the program is accurate for future days.

Editing Projected Detail for Selected Kind

When you click a record listed in the **Summary of Projection Kinds** grid, information for that record displays in the **Projection Detail For Selected Kind** grid. Follow the instructions in this section to edit the **Quantity** for the selected **Kind**:

1. Click the **Cost** button to open the **Cost** module.
6. From the **Cost** menu, select the **Projections** option. The **Projections** window displays.
7. Under **Summary of Projection Kinds**, click the kind you want to edit.
8. In the **Incidents** grid, click the projection you want to edit.
9. Under **Projection Detail for Selected Kind**, click to check the **Flow Down** checkbox. When this option is selected, the system automatically updates all dates after the date you edit with your changes.
10. Identify the date you want to edit. Enter the new **Quantity** for that date. The system automatically updates the entries for all dates that follow the selected date with the new amount.
11. Click the **Save** button to save your changes to the projection.

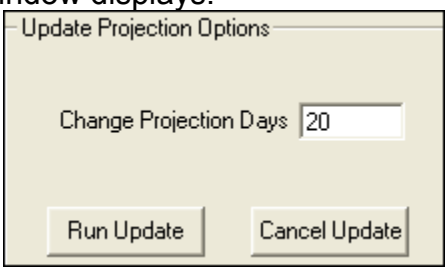
Updating Projection with Current Day's Cost

Cost Projections may need to be updated for two different reasons:

- To change the number of days in a projection.
2. To adjust a previously created projection for the current day.

Follow the steps in this section to use the **Update Projection w/Current Day's Cost** option to update the projection:

1. Click the **Cost** button to open the **Cost** module.
- From the **Cost** menu, select the **Projections** option to open the **Projections** window.
- In the **Incidents** grid, click the projection you want to update.
- Click the **Update Projection w/Current Days Costs** button. The **Update Projection Options** window displays.



5. In the **Change Projection Days** box, enter the total number of days to include in the projection.
2. Click the **Run Update** button. When you run this process, the following occurs:
- The system automatically changes the **Start Date** for the projection to tomorrow's date.
6. The system cuts off all days prior to the next day and creates a projection that includes the days that you defined.
7. The quantity that you defined for days that were previously included in the projection remains the same.
   EXAMPLE
   A projection was created for 6/1 to 6/10. Within the projection, 5 dozers were defined for 6/1 to 6/5 and 2 dozers were defined for 6/6 to 6/10. On 6/3, the **Update Projection w/Current Days Cost** button was clicked. When prompted to update the projection days, 10 was entered indicating ten days. The projection was updated so 5 dozers are now defined for 6/4 to 6/5 and 2 dozers for 6/6 to 6/13.

You can update the projection as many times as needed. If your assumptions totally change, you can start over with a new projection at any time.

Creating a Projection Graph

Cost users may want to generate a projection graph for presentation along with reports. Follow the steps in this section to create a Projection graph:

1. Click the **Cost** button to open the **Cost** module

- From the **Cost** drop-down list, select the **Projections** option to open the Projections window.
- In the **Incidents** grid, click the appropriate projection.
- Under **Graphs**, click the type of graph you want to create. The available options are **Cost By Date** and **Total Proj. Cost**.
- Click the **Graph** button to create the graph. The graph opens in the **Preview** window.
- Click the **Print Report** button on the **Preview** window to print the graph.
- When the **Print** window opens, click the **Print** button.

Creating a Projection Report

Cost users may need to generate a projection report for management decision-making purposes. Follow the steps in this section to create a **Cost Projection** report:

1. Click the **Cost** button to open the **Cost** module
2. From the **Cost** menu, select the **Projections** option to open the Projections window.
3. In the **Incidents** grid, click the appropriate projection.
4. Under **Reports**, click the report you want to print. The available report options are **Projection**, **Weekly**, or **Total Costs**.
5. To preview and then print the report, click the **Preview** button. When the Preview window displays, click the **Print Reports** button.

   To print the report without first previewing it, click the **Print** button.
6. When the **Print** window displays, click the **Print** button.

Cost Share Apportionment

This section explains the purpose and use of **Cost Apportionment**.

Cost sharing is provided for incidents where there is more than one jurisdictional agency involved and costs are to be shared between agencies. Cost apportionment functions through the assignment of resources to divisions, with those divisions potentially having unique percentage breakdowns per division, per day.

Guidelines for Cost Apportionment

The **Cost** module provides features to facilitate reporting cost figures for **Cost Share Agreements**. This feature involves three distinct steps:

1. Create Cost Divisions. See "Creating Divisions"
2. Assigning resources to a divison. See "Assigning Resources to a Division"
3. Generating Cost Share Reports. See "Generating Cost Share Reports"

To accurately report cost shares, you must create a separate division for each day of incident cost reporting.

Cost does not provide a separate "Cost Share" module or menu. Rather, it utilizes the more generic features to accomplish cost share reporting.

The divisions in the Cost module are not necessarily the same as the operational division on an incident.

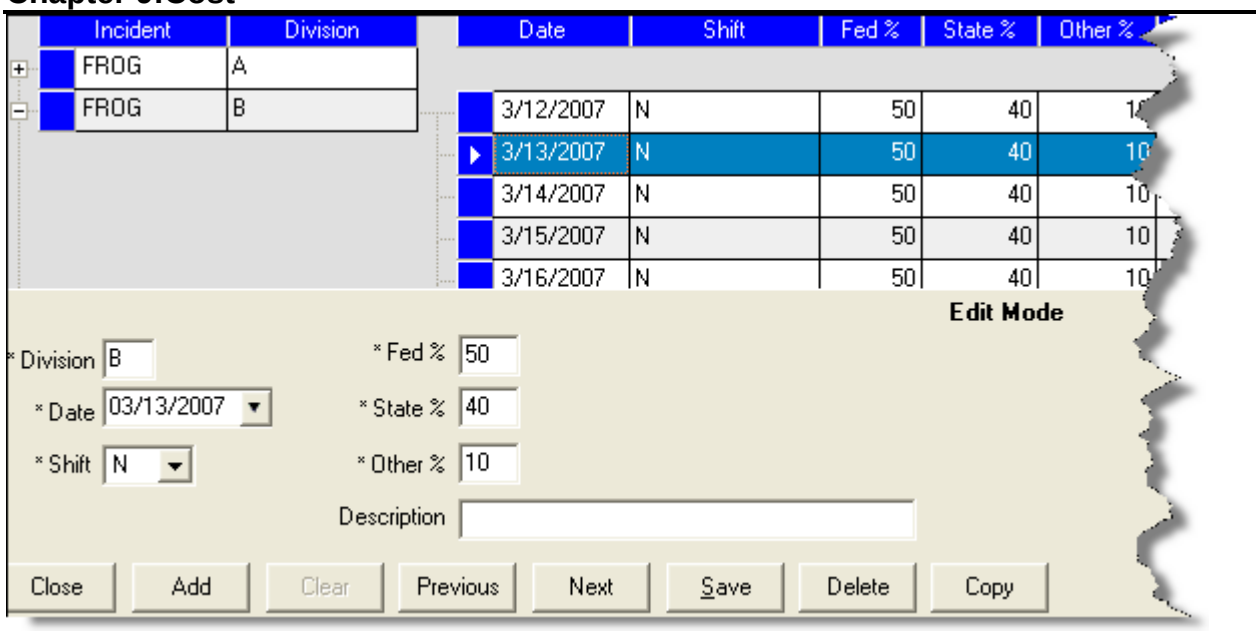
Creating Divisions

The first step in **Cost Apportionment** is to create new entries in the **Divisions** table. The **Division** table is where you define divisions, shifts and cost sharing percentages by agency. For example, the Day shift on Division A would be A1 (A = Division, 1 = Day Shift). Once a division is set up, you can assign the division to a resource in the **Manage Cost Grid.** Only those resources with a **Division** and **Shift** defined are included in the **Cost Share**.

The divisions in the Cost module are not necessarily the same as the operational divisions on an incident.

Follow the steps in this section to create a new division:

1. Click the **Cost** button to open the **Cost** module
2. From the **Cost** menu, select the **Divisions** option to open the **Cost - Divisions** window.



3. From the **Incident** drop-down list, select the appropriate incident.
2. In the **Division** box, enter the code to assign to the division. In most cases, this is an A, B or 1, 2 type value.
3. Enter the **Date** for the cost apportionment percentages.
4. From the **Shift** drop-down list, select the appropriate shift.
5. In the **Fed%** box, enter the Federal percentage of their cost obligations to the division for the defined date.
6. In the **State%** box, enter the State percentage of their cost obligations to the division for the defined date.
7. In the **Other%** box, enter the Other percentage of their cost obligations to the division for the defined date. Other represents any other agency or group that is not either Federal or State (i.e. county, city, etc.).
8. In the **Description** box, enter any additional information about the division.
9. Click the **Save** button to save the division information.

If you entered a date prior to the current date in the **Date** box, a message displays indicating that the system will automatically create division entries for all of the prior dates. Click **OK** to continue with the process. If you do not want division entries created for all of the prior dates, click the **Cancel** button and enter a different date into the **Date** box.

3. Repeat these steps for each division you want to add to the system.
4. Click the **Close** button when you have finished adding divisions

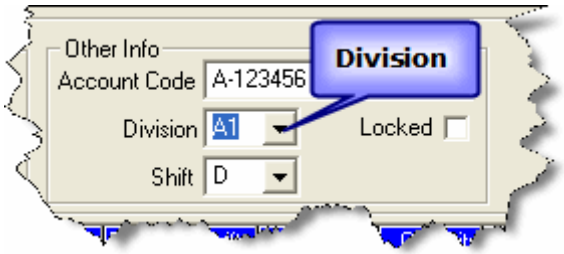
The application will automatically create a daily entry for every division up to the current date.

Assigning Resources to a Division

The second step in cost share reporting is to set division assignments – by resource and day.

Follow the steps in this section to assign resources to a division:

1. Click the **Cost** button to open the **Cost** module.
4. In the **Resources** grid, click the resource you want to assign to the division.
5. Click the **Show Costs** button to display the **Daily Detail** information at the bottom of the window.
4. Click the appropriate date in the grid at the bottom of the window.
2. From the **Divisions** drop-down list, select the division to assign to that resource for the defined date.



Divisions only display in the drop-down list if there was an entry created for that day.

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.

4. Click the **Save** button to save the division to the resource.

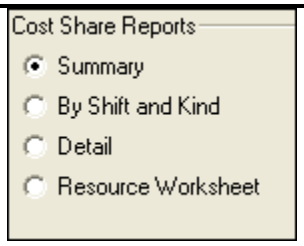
Generating Cost Share Reports

The third step in cost share reporting is to generate the **Cost Share Reports**.

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.

Follow the steps in this section to generate **Cost Share Reports**:

1. Click the **Cost** button to open the **Cost** module.
5. From the **Incidents** drop-down list, select the appropriate incident.
6. Click the **Reports** button to open the **Select Report** window.
7. Under **Report Categories**, click the **Other Categories** option.
8. Click the **Cost Share** report in the area beneath the **Report Categories** frame. The Report Settings for Cost Share display:



6. Under **Cost Share Reports**, click **By Shift and Kind**.
2. To preview and then print the report, click the **Preview** button. When the Preview window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
3. When the **Print** window displays, click the **Print** button.

Cost Revision History

Revision Date	Revision Summary
2011-03-03	Revised instructions for the 11.01.00 version of I-Suite.
2010-07-07	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised instructions for the 9.01.00 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Revised instructions for 7.01.00 version of I-Suite.
2007-01-19	Revised instructions based on changes received for Training Manuals.
2006-12-04	Revised instructions by adding more detail and graphics.
2006-06-12	Revised instructions for the 6.02 version of I-Suite.
2006-04-17	Revised instructions for the new I-Suite 2006 application.
2005-02-28	Revised instructions for the new I-Suite website and to reflect changes in procedures from the June and August 2004 I-Suite releases.

Custom Reports

The **Custom Reports** section explains how to use I-Suite data to create reports that are not available in the standard reports.

All custom reports can be viewed and printed by other I-Suite users with the same rights.

Only the original report creator can delete or make changes to a report they created.

The basic features of the **Custom Reports** window include:

- **Report Designer** – Allows you to pick fields to use in creating custom reports. Once the report is created, you can save it to the database.

7. **Advanced Designer** – Allows you to construct a valid SQL statement to create custom reports. Once the report is created, you can save it to the database.
8. **Manage Saved Reports** – Allows you to preview, print, edit, delete, export and import custom reports.

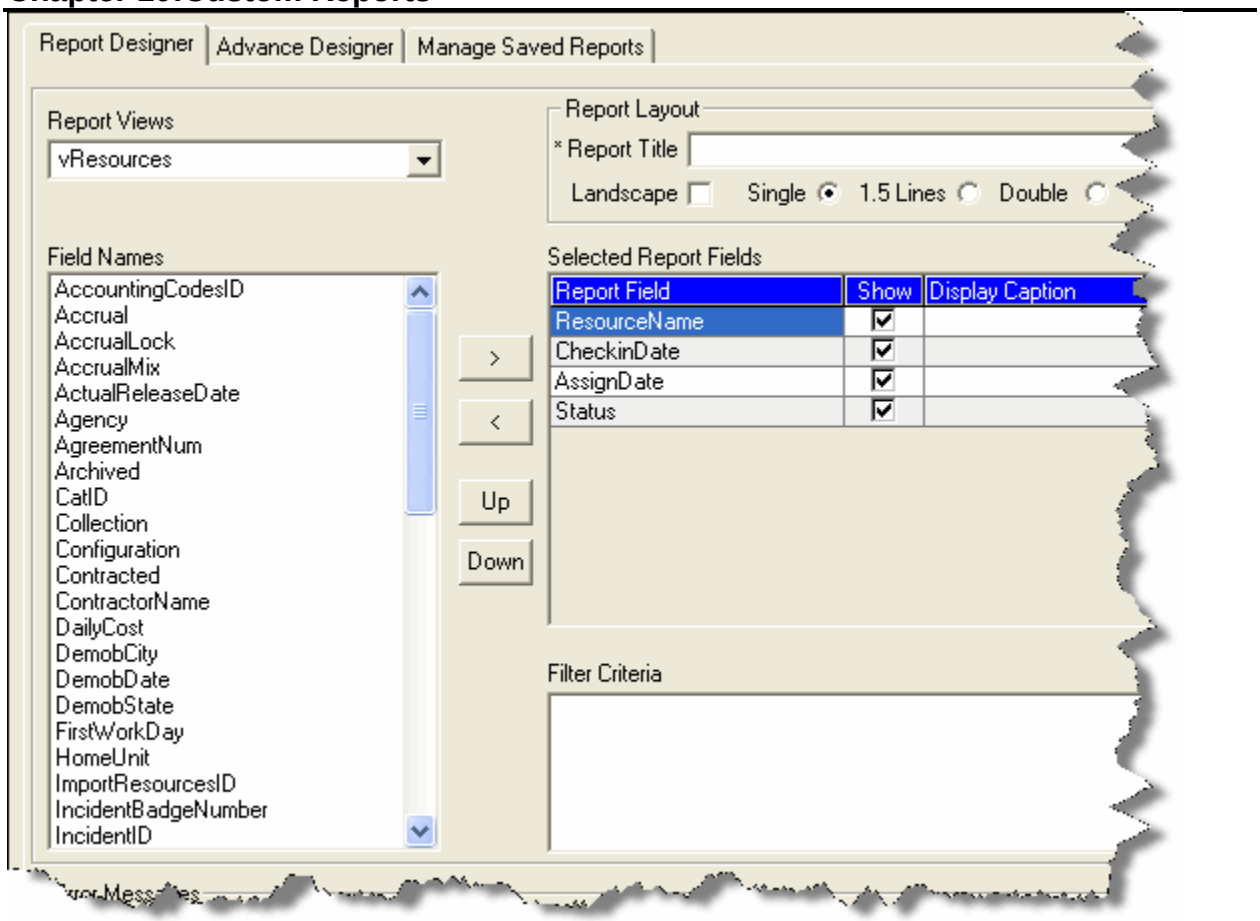
Topics in this section include the following:

- See "Report Designer"
- See "Advanced Designer"
- See "Manage Saved Reports"

Report Designer

Follow the steps in this section to design and print a custom report in **Report Designer**:

1. From the **Reports** menu, select **Custom Reports** to open the **Custom Reports** window.



2. From the **Report Views** drop-down list on the **Report Designer** tab, select the view to use in creating the report. The fields available for the report are based on the view that you select.

The data views that are available are based on the **Rights** associated with your **User ID**.

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 under **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**.
3. 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.
4. To change the column heading on the report, enter the name in the **Display Caption** field.

5. To change the width of a column in the report, enter the new width in the **Width** field.
6. To change the sort order for a column to either **Ascending** or **Descending**, select either **ASC** or **DESC** from the **Sort** drop-down list.
7. To add an aggregate to a column, select the appropriate option from the **Aggregate** drop-down list.
8. Under **Report Layout**, enter a **Report Title** for the custom report.

The **Report Title** 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.
4. Click the line spacing to use under **Report Layout**. You can select **Single**, **1.5**, or **Double**.
5. To save your custom report, click the **Save** button. When the message window displays, click the **OK** button to close the window.

Saved **Custom Reports** are listed under **Manage Saved Reports** from where they can be **Printed**, **Edited**, **Deleted**, **Copied**, **Exported** or **Imported** as needed.

13. To preview the report and then print it, click the **Preview** button. When the **Preview** window displays, click the **Print Report** button.

    To print the report without first previewing it, click the **Print** button.
11. When the **Print** window displays, click the **Print** button

You can **Preview** and **Print** your report before or after you save it. You do not have to save your report.

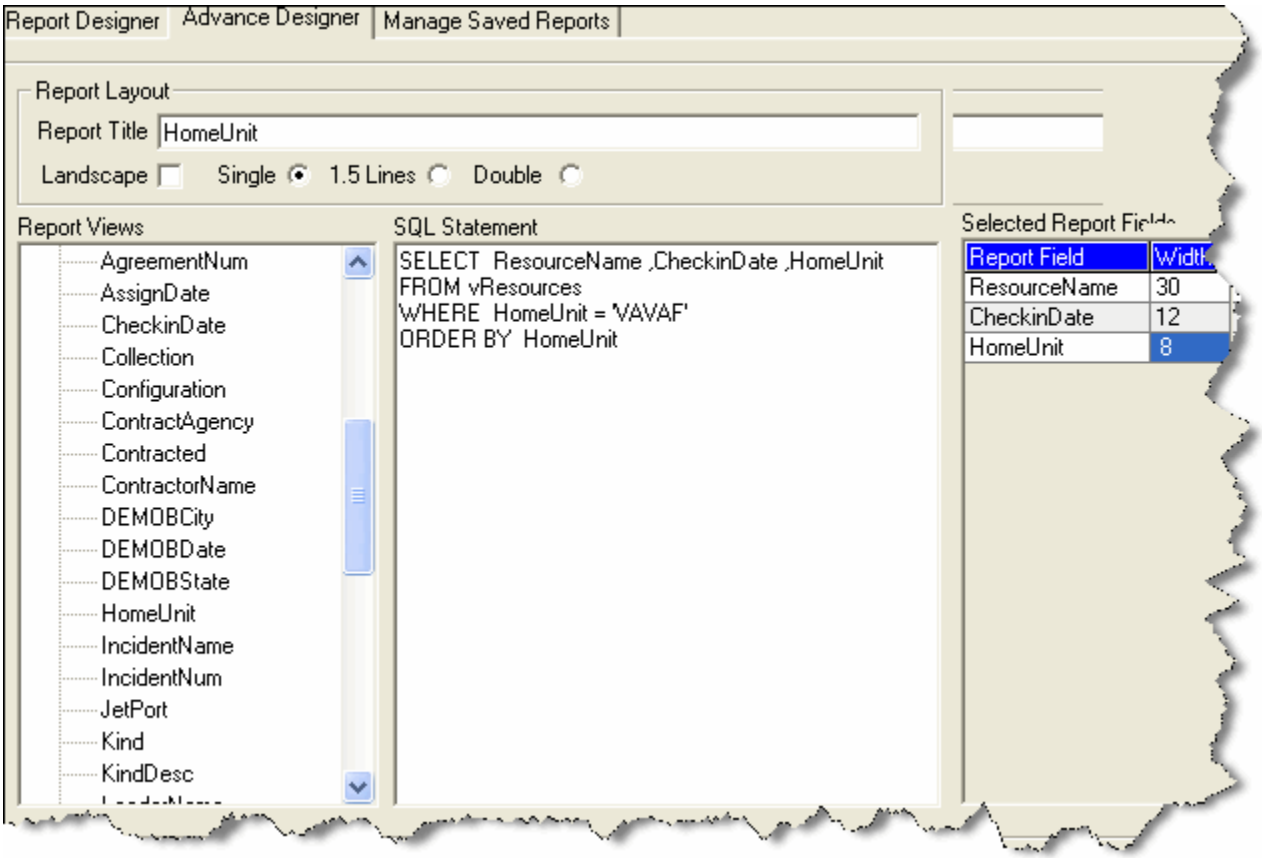
If you intend to save your report, it is a good practice to save it before you preview or print it.

Advanced Designer

Follow the instructions in this section to create and print custom reports with the **Advanced Designer**:

1. From the **Reports** menu, select **Custom Reports** to open the **Custom Reports** window.

14. Click the **Advanced Designer** tab.



15. Under **Report Layout**, enter a **Report Title** for the custom report.

The **Report Title** 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.

4. 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 the line spacing to use under **Report Layout**. You can select **Single**, **1.5**, or **Double**.
3. 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**.
7. In the **SQL Statement** frame, 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**.

If the **SQL Statement** is invalid, a message displays under **Error Messages**. Correct the error in the **SQL Statement** and then click the **Check** button again. For more information on writing valid SQL statements, refer to See "Components of a Valid SQL Statement".

8. To change a column width, enter the appropriate **Width** next to the **Report Field**.
8. To save your custom report, click the **Save** button.
9. When the message displays indicating that the report was saved, click the **OK** button to close the window.

Saved **Custom Reports** are listed under **Manage Saved Reports** from where they can be **Printed**, **Edited**, **Deleted**, **Copied**, **Exported** or **Imported** as needed.

11. To preview the report and then print it, click the **Preview** button. When the Preview window displays, click the **Print Report** button.

    To print the report without first previewing it, click the **Print** button.
9. When the **Print** window displays, click the **Print** button.

You can **Preview** and **Print** your report before or after you save it. You do not have to save your report.

Components of a Valid SQL Statement

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:

- SELECT clause – identifies the data.

12. FROM clause – identifies the table.
13. WHERE clause – limits the data that the SELECT statement returns.
14. GROUP BY – organizes data into sets.
15. COUNT(*) – gives a summary value per set (e.g.: 209 Resource List).
16. DISTINCT - allows you to remove duplicates from the result set.
17. TOP - specifies that only the first set of rows will be returned from the query result.
18. ORDER BY - sets the order for the data sets that are returned from the query result.

The following is a list of some best practices to follow when constructing SQL statements:

- KEYWORDS – in uppercase.
- All other words – in lowercase.
- Clauses – each clause on a separate line.
- Complex WHERE clause – can be separated onto multiple lines.
- Minimum requirement – a valid SQL statement must have at least a SELECT and a FROM clause.

The following diagram shows basic SQL statement formatting.

Basic SQL statement format:
SELECT *fieldname 1*, *fieldname 2*, ...*fieldname n*

FROM *tablename*
WHERE *fieldname* conditional *value* (logic_operand *fieldname* conditional *value* ...)
ORDER BY *fieldname*

conditional				**logic_operand**	
=	Equal To	>=	Greater Than Or Equal To	OR	Either conditional statement being True will make entire statement True
<>	Not Equal To	<	Less Than	AND	Both conditional statements must be True to make entire statement true.
>	Greater Than	<=	Less Than or Equal To	NOT	Reverses the conditional statement value (True becomes False, False becomes True)
LIKE	Text Comparison (use with % for wildcard values; for example: Kind LIKE 'HC%')				

SQL Statement Examples

The following are example SQL statements:

```
SELECT RequestNumber, ResourceName AS Crew
FROM vBasicRpts
WHERE Status <> 'D' AND ResourceName LIKE 'M%' and KindCode in ('HC1', 'HC2')

SELECT ResourceName, CheckinDate FROM vBasicRpts
WHERE KindCode = 'DIVS' and CheckinDate between '05/15/07' and '05/20/07'
ORDER BY ResourceName

SELECT Agency, COUNT(*) AS [Agency Count], SUM(NumberPersonnel) AS
NumberPersonnel
FROM vBasicRpts
GROUP By Agency
```

Manage Saved Reports

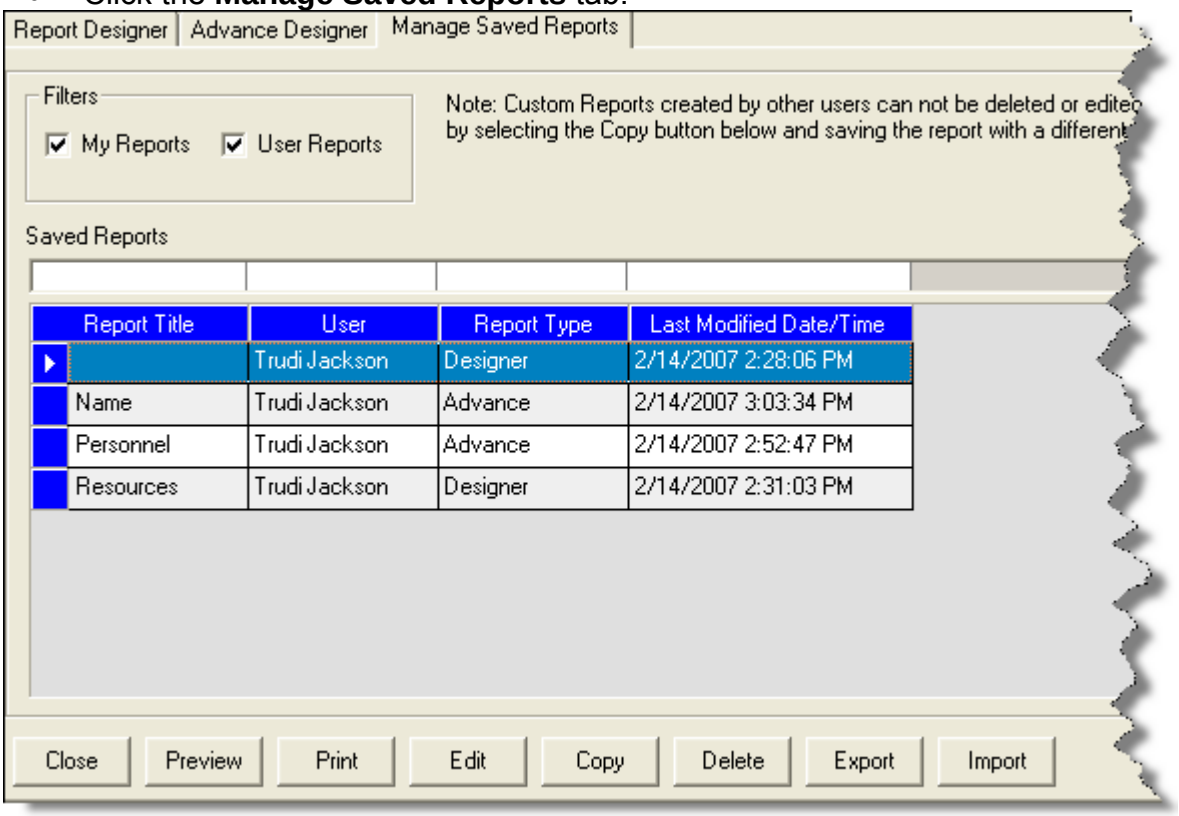
This section explains how to manage saved reports in Custom Reports.

Previewing and Printing Custom Reports

Follow the steps in this section to preview and print saved custom reports:

1. From the **Reports** menu, select **Custom Reports** to open the **Custom Reports** window.

- Click the **Manage Saved Reports** tab.



3. 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.

4. **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.
4. In the **Saved Reports** grid, click the report you want to preview and print.

- To preview and then print the report, click the **Preview** button. When the Preview window opens, click the **Print Report** button.

  To print the report without first previewing it, click the **Print** button.
- When the **Print** window displays, click the **Print** button.

Editing Custom Reports

Follow the steps in this section to edit custom reports:

Only the user who originally created the report can make changes to it.

1. From the **Reports** menu, select the **Custom Reports** option to open the **Custom Reports** window.
5. Click the **Manage Saved Reports** tab.
6. 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.

2. **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.
4. In the **Saved Reports** grid, click the report you want to edit.

- Click the **Edit** button. The report opens in the appropriate designer window.
- Make the appropriate changes to the report.
- Click the **Save** button to save your changes

Copying Custom Reports

Follow the steps in this section to copy a custom report:

Users that did not create the original custom report can still copy it to create a new report.

1. From the **Reports** menu, select the **Custom Reports** option to open the **Custom Reports** window.
5. Click the **Manage Saved Reports** tab.
6. 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.

2. **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.
4. In the **Saved Reports** grid, click to select the report you want to copy.

- Click the **Copy** button.
- 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.
- Make the appropriate changes to the copied report.
- In the **Report Title** box, enter a unique title for the report.
- Click the **Save** button to save the report.

Deleting Custom Reports

Follow the steps in this section to delete custom reports:

Only the user who originally created the report can delete it.

1. From the **Reports** menu, select the **Custom Reports** option to open the **Custom Reports** window.
5. Click the **Manage Saved Reports** tab.
6. 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.

2. **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.
4. In the **Saved Reports** grid, click the report you want to delete.

- Click the **Delete** button.
- When the message displays asking whether you want to delete the report, click the **Yes** button to remove the report from the system.
- A message displays indicating that the saved report was deleted. Click the **OK** button to close the message window.

Exporting Custom Reports

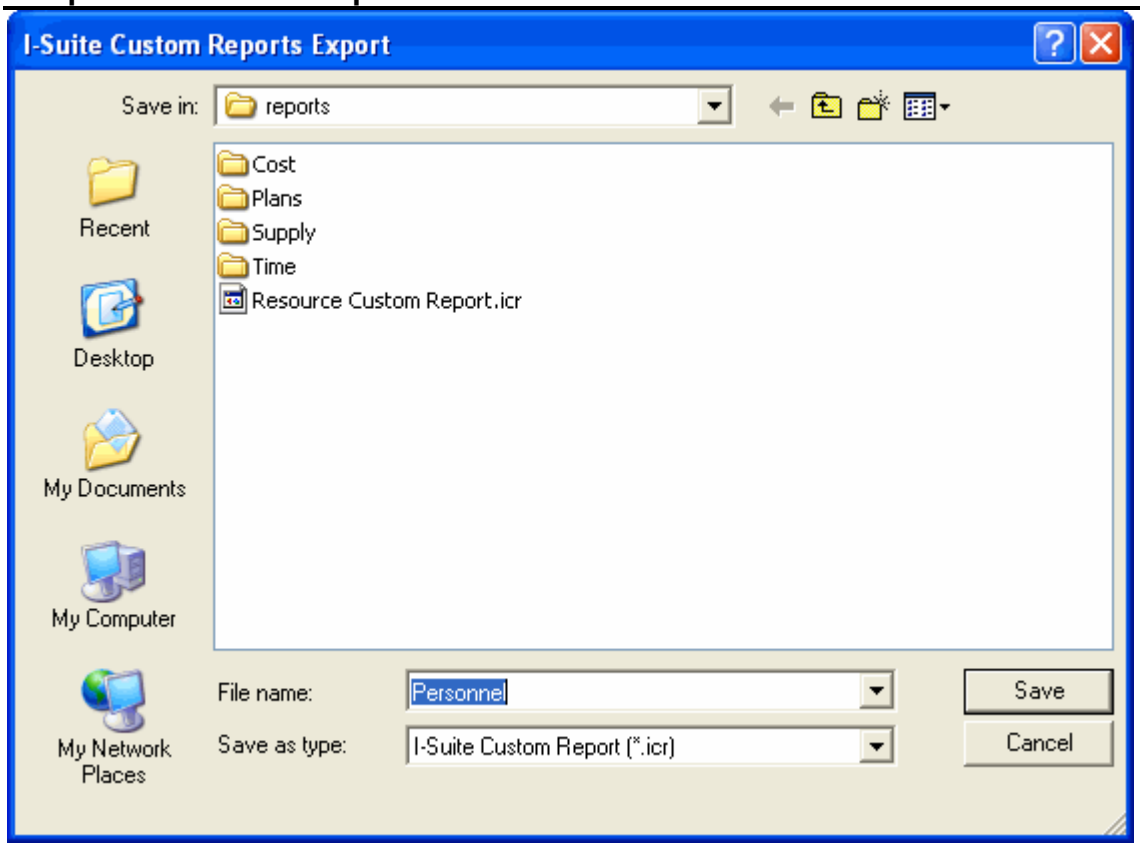
Follow the steps in this section to export custom reports:

1. From the **Reports** menu, select **Custom Reports** to open the **Custom Reports** window.
5. Click the **Manage Saved Reports** tab.
6. 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.

2. **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.
4. In the **Saved Reports** grid, click the report you want to export.

- Click the **Export** button. A **Custom Reports Export** window displays.

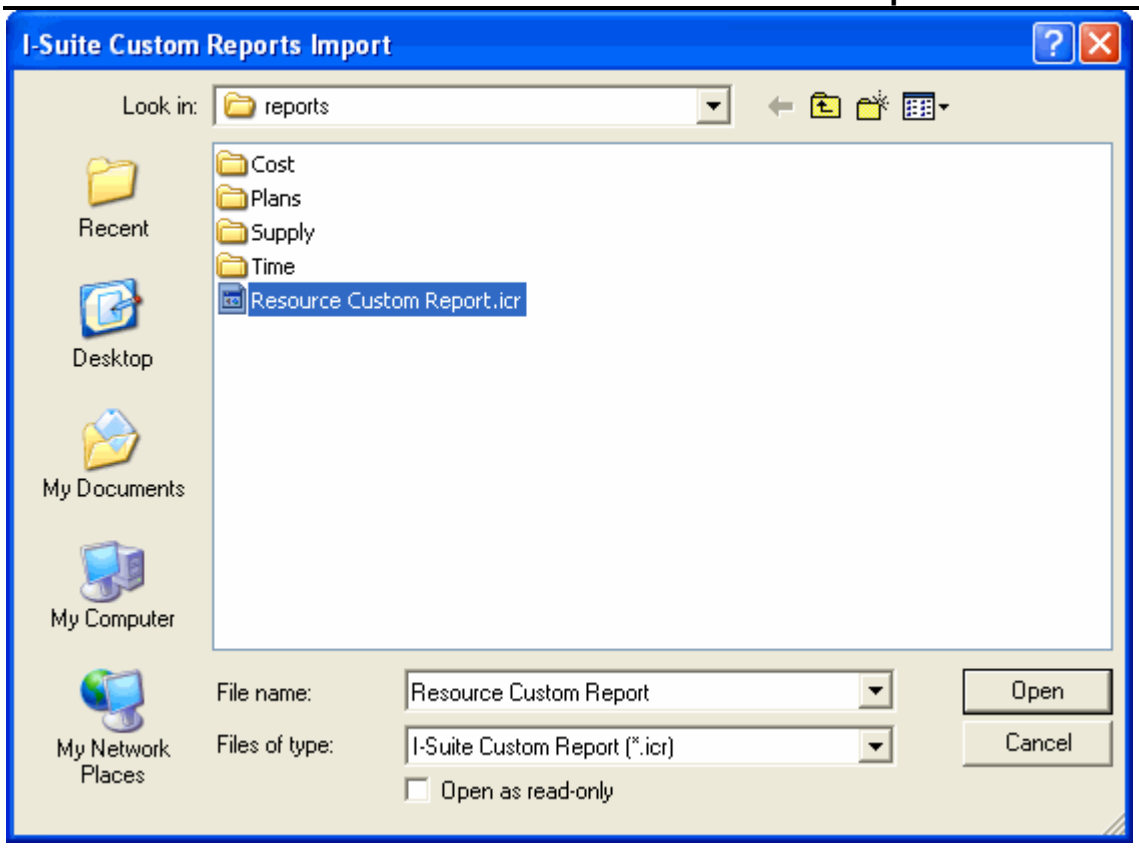


6. From the **Save in** drop-down list, select the directory where you want to save the custom report.
5. The report's name automatically displays in the **File Name** field. If you want to assign a different name to the report, enter the new name into the **File Name** field.
6. Click the **Save** button to export the custom report.
7. When the message displays indicating that the export was successful, click the **OK** button to close the window.

Importing Custom Reports

Follow the steps in this section to import custom reports into the I-Suite system:

1. From the **Reports** menu, select **Custom Reports** to open the **Custom Reports** window.
7. Click the **Manage Saved Reports** tab.
8. Click the **Import** button. A **Custom Reports Import** window displays.



4. From the **Look in** drop-down list, select the directory where the custom report is saved.
2. Click the custom report you want to import.
3. Click the **Open** button to import the report.

Custom Reports Revision History

Revision Date	Revision Summary
2010-04-27	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised instructions for the 9.01.00 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Revised instructions for the 7.01.00 version of I-Suite.
2007-01-19	Revised instructions based on changes received for Training Manuals.
2006-12-04	Revised instructions by adding more detail and graphics.
2006-06-12	Revised instructions for the 6.02 version of I-Suite.
2006-04-12	Instructions for new module of the new I-Suite 2006 application.

Supply

The **Supply** section explains how to use the **Supply** module to issue, return, transfer and receive supplies. Information in **Supply** may come from other I-Suite modules, including:

- Resources
5. Demob
6. Incident Action Plan (IAP)
7. Time
8. Cost

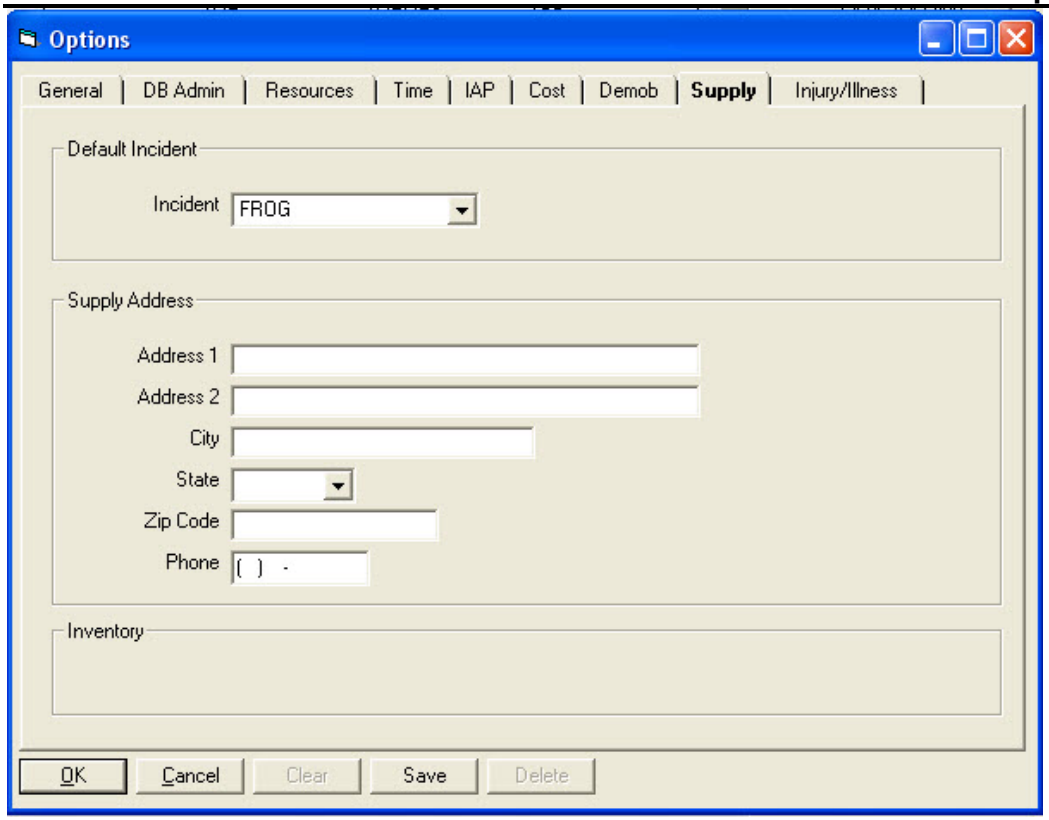
Topics in this guide include the following:

- See "Common Features"
- See "Selecting Supply Options"
- See "Receive Supply Items"
- See "Issue Supply Items"
- See "Issue Returns"
- See "Release Supply Items"
- See "Add / Edit Supply Items"
- See "Add / Edit Locations"
- See "Transfer (at Incident)"
- See "Supply Inventory"
- See "Advanced Search"
- See "Supply Reports"
- View Supply History

Selecting Supply Options

Follow the steps in this section to select options for the **Supply** area of the I-Suite system:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
- Click the **Supply** tab to select it.



3. From the **Incident** drop-down list, select the incident to which the supply options apply.
2. Under **Supply Address**, enter the supply address, including **Address 1**, **Address 2**, **City**, **State**, **Zip Code** and **Phone Number**.
3. If you want to track the supply inventory, click to check the **Track Inventory** checkbox.
4. When you have made all of your changes, click the **Save** button to save the changes. Click the **OK** button to close the Options window.

Receive Supply Items

This unit explains how to receive supplies.

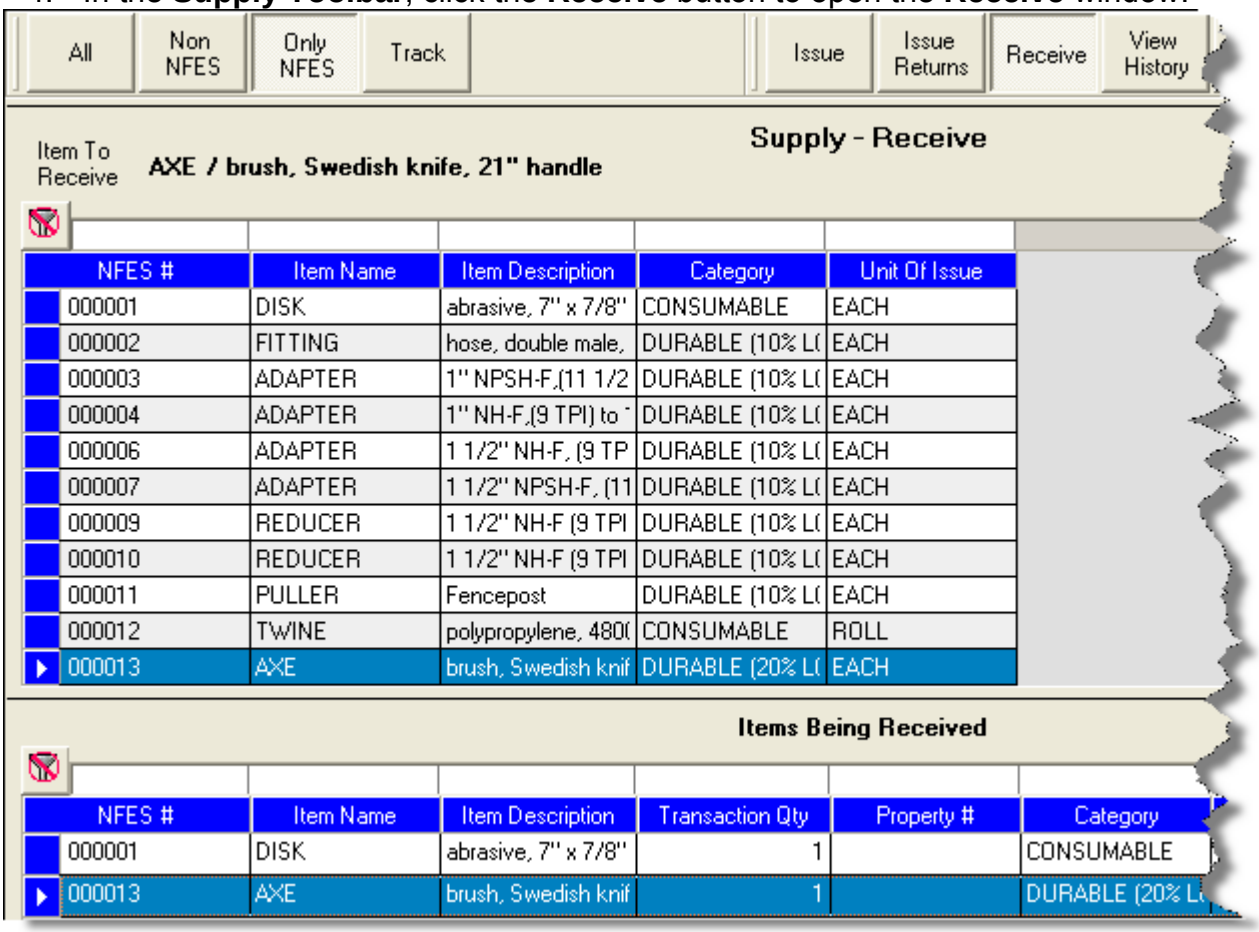
If you are using the **Track Inventory** feature, it is a good practice to **Receive** all items before issuing them to resources. If you do not **Receive** the items, the inventory counts may not be correct.

If you are NOT using the **Track Inventory** feature, you do not need to **Receive** items before issuing them.

Filtering Supply Items

Follow these steps to filter the supply items in the Item To Receive grid:

1. Click the **Supply** button to open the **Supply** module.
4. In the **Supply Toolbar**, click the **Receive** button to open the **Receive** window.



3. Click one of the following buttons to filter the list of supplies:

- **All** - Displays all supply items

4. **Non NFES** - Only displays supply items without NFES numbers
5. **Only NFES** - Only displays supply items with NFES numbers
6. **Track** - Only displays trackable supply items

Receiving Supplies

Follow the instructions in this section to receive supplies from a cache or other location outside of the incident:

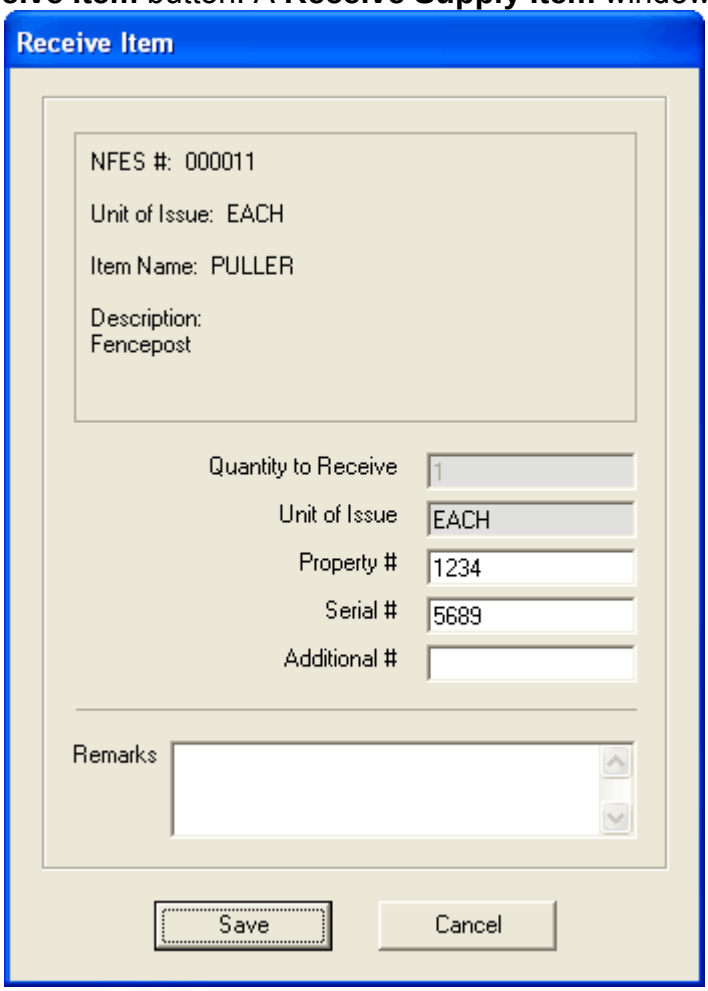
Only those supply items defined in **Add Supply Item**, display in the **Item to Receive** grid.

1. Click the **Supply** button to open the **Supply** module.

- Click the **Receive** button to open the **Receive Supply** window.
- From the **From Location** drop-down list, select the location from which you are receiving the supply item.

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.
2. Click the **Receive Item** button. A **Receive Supply Item** window displays.



6. Enter the **Quantity to Receive**.
5. Enter the **Property** # assigned to the item, if applicable.

If you enter a **Property** # for the item, the **Quantity to Receive** is automatically set to 1 and you cannot change it.

8. Enter the **Serial** # assigned to the item, if applicable.

7. Enter an **Additional** # assigned to the item, if applicable.
8. In the **Remarks** box, type any remarks that apply to the receive item transaction.
9. Click the **Save** button to save the supply item to the **Items Being Received** grid.
10. Repeat steps 4 - 11 for each item you are receiving from the selected location.

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.

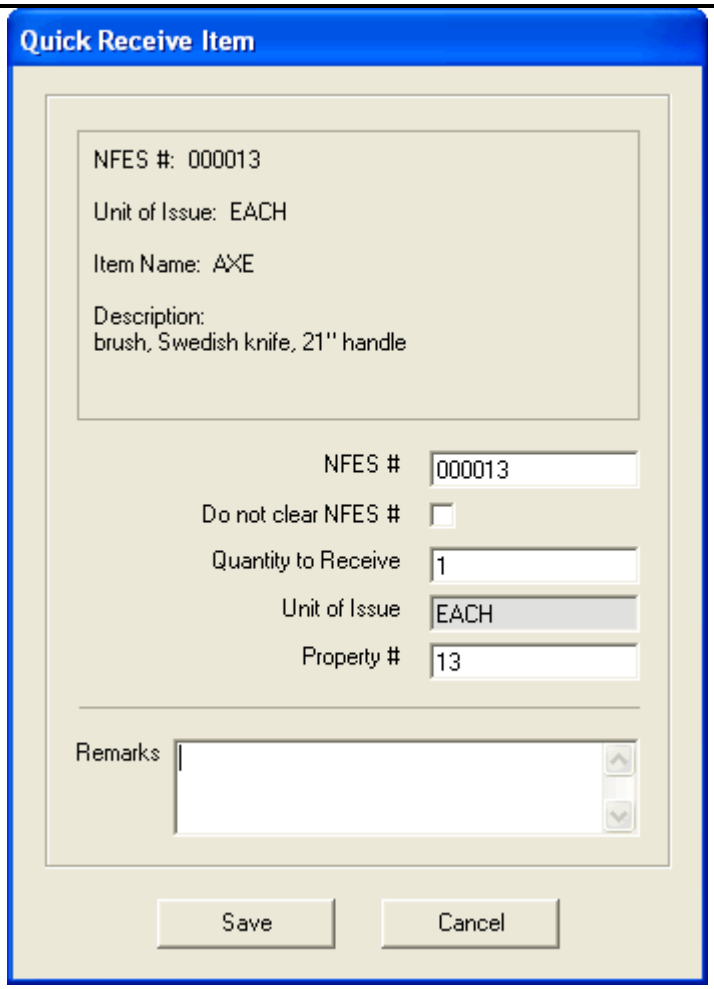
13. When all items you are receiving are listed in the **Items Being Received** grid, click the **Save** button to complete the **Receive** procedure.

Using Quick Receive Items

Follow the steps in this section to quickly receive supply items:

To use this feature, you must know the **NFES** # of each item. The preceding 0's (zeroes) do not need to be entered. For example, "000154" can be entered as "154."

1. Click the **Supply** button to open the **Supply** module.
14. Click the **Receive** button to open the **Supply - Receive** window.
15. 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.
2. 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.
3. 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.

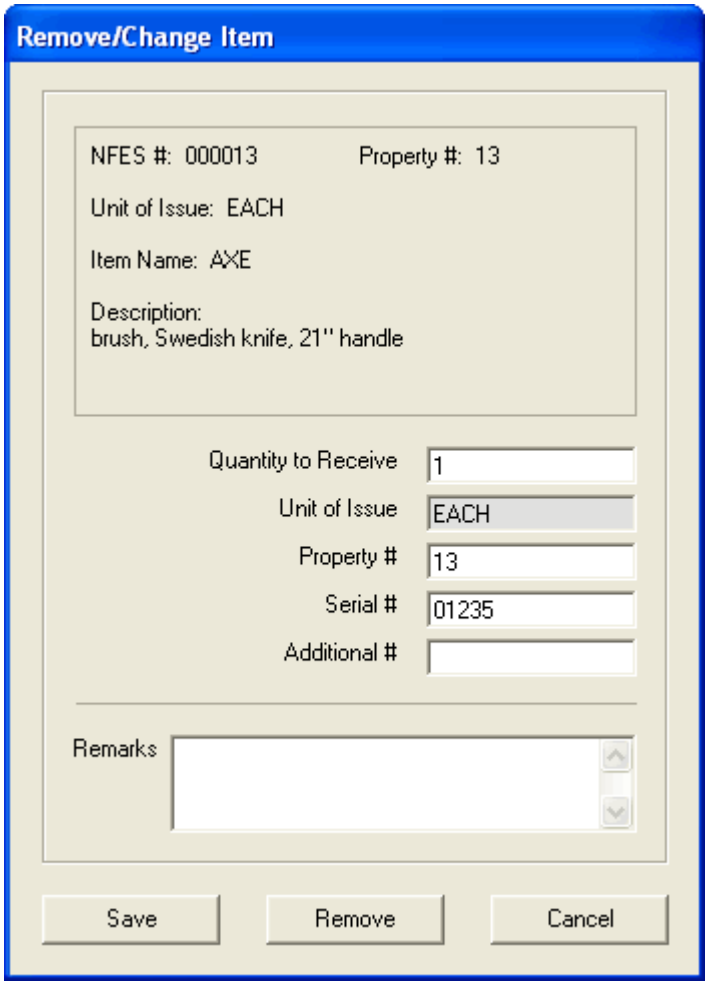
If you enter a **Property** # for the item, the **Quantity to Receive** is automatically set to 1 and you cannot change it.

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.
8. Repeat steps 4 - 8 for each item you are receiving from the selected location.
9. When you have finished receiving items, click the **Cancel** button to close the **Quick Receive Item(s)** window.
10. Click the **Save** button to finish receiving the items into Supply.

Remove/Change Item Being Received

Follow the steps in this section to either change the quantity for an item listed in the Items Being Received grid or remove the item from the grid:

1. In the **Items Being Received** grid, click the item you want to edit.
9. Click the **Remove/Change Receive** button to open the **Remove/Change Item** window.



3. In the **Quantity to Receive** box, enter the total number being received.

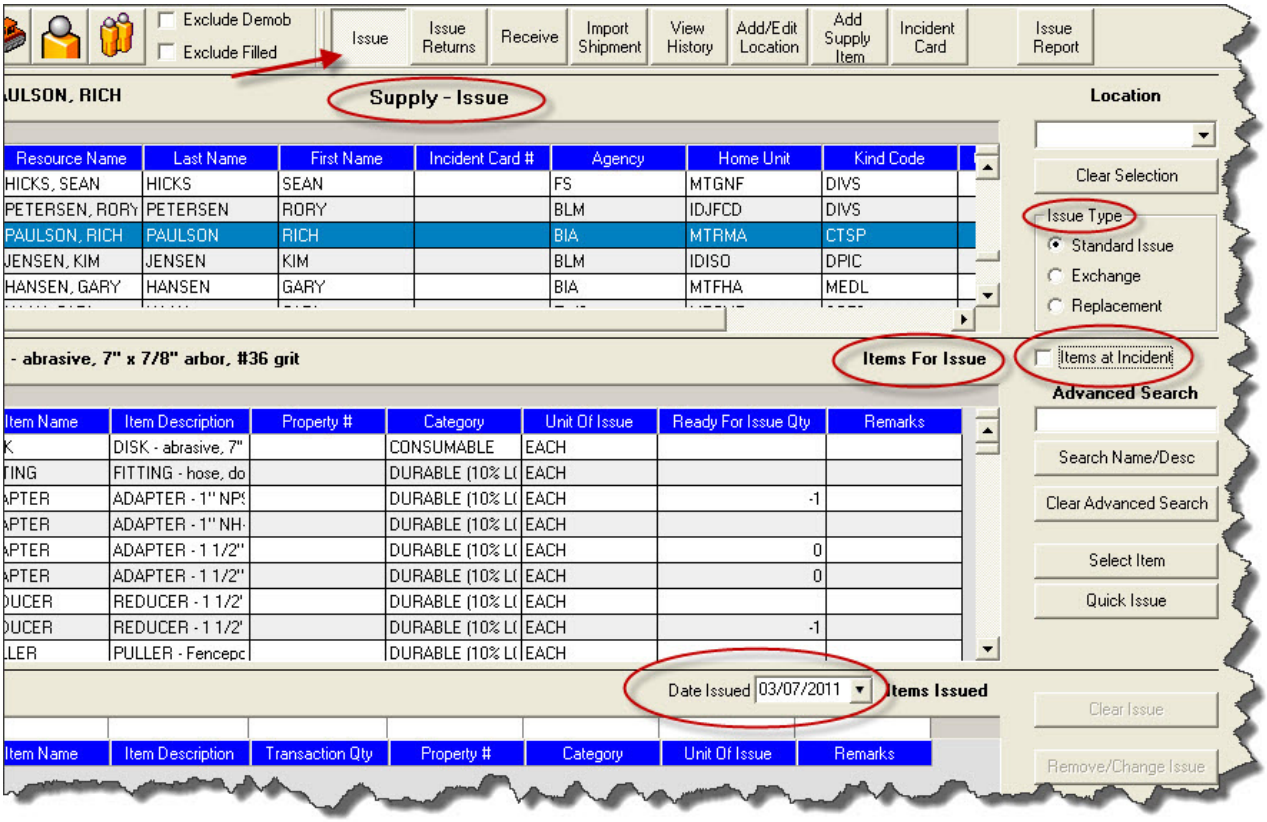
To remove the item, enter **0** (zero) in the **Quantity to Receive** box.

4. In the **Property #** box, enter a property number, if applicable.
4. In the **Serial #** box, enter a serial number, if applicable.
5. In the **Additional # box**, enter an additional number, if applicable.
6. In the **Remarks** box, enter any remarks applicable to removing or changing the item.
8. Click the **Save** button to change the quantity. Click the **Remove** button to remove the item.

Issue Supply Items

Follow the steps in this section to issue supply items:

1. Click the **Supply** button to open the **Supply** module or choose **Modules** and then **Supply** from the menu.
9. Click the **Issue** button from the toolbar to open the **Supply-Issue** window.
   NOTE: If you are issuing items in the ISuite system that have already been issued to a resource on an earlier date, you must change the **Date Issued** field to reflect the actual date the items were issued. The **Date Issued** date defaults to the system date. (Example: Issuing items at an Incident before the computer systems were up)



10. Do one or both of the following:

- In the **Resources** grid, click the resource to which supplies are being issued.

2. From the **Location** drop-down list, select the location to which the supplies are being issued.

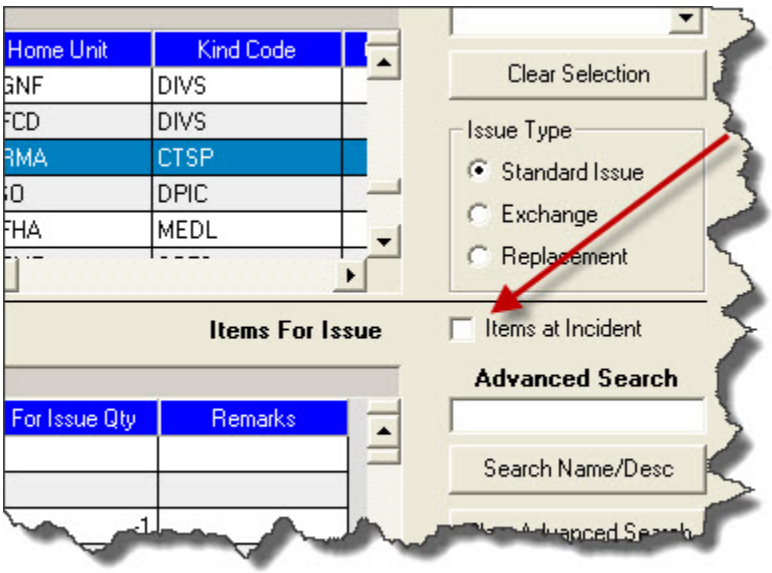
To unselect a **Resource** or unselect a **Location**, click the **Clear Selection** button.

If your team is part of the **Supply Pilot**, you can scan a resource's incident card to

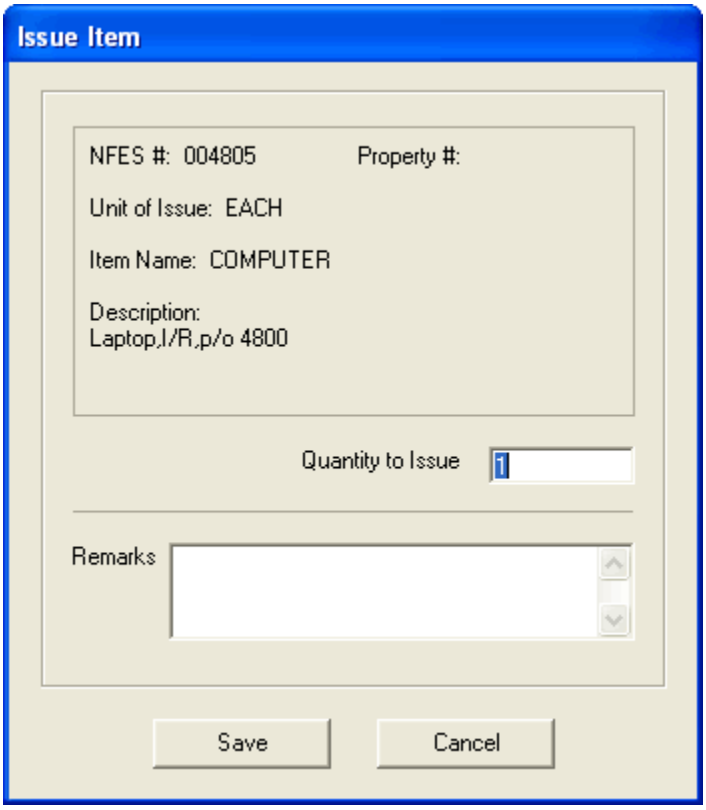
select that resource when issuing supplies.

4. Under **Issue Type**, click to select the type of issue: Standard Issue, Exchange or Replacement.

- Under **Items for Issue**, click to select the item being issued. If you wish to see only those items that are currently at the Incident, click the **Items at Incident** checkbox.



- Click the **Select Item** button to open the **Issue Items** window.



- In the **Quantity to Issue** box, enter the quantity of the item to issue.
- In the **Remarks** box, enter any remarks that apply to the item being issued.
- To add the **Item(s)** to the **Items Issued** grid, click the **Save** button.
- To add another **Item** to the **Items Issued** grid, repeat steps 4 - 8. When you are finished, click the **Cancel** button to close the **Issue Items** window.

You can only issue items to one **Resource** or **Location** at a time.

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.

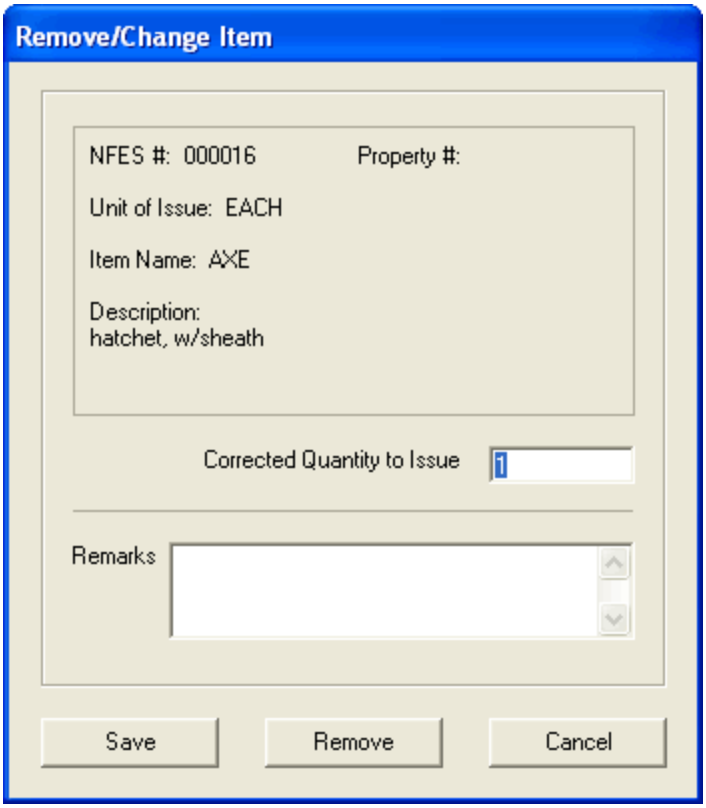
10. When all items to be issued are in the **Items Issued** grid, click the **Save Item(s)** button to issue the items to the selected location or resource.

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.

Remove/Change Items Issued

To remove or change the quantity of an item on the **Items Issued** grid, follow these steps:

1. Click to select the item you want to remove or change.
11. Then click the **Remove/Change Issue** button. A **Remove Item(s)** window displays:



12. In the **Correct Quantity to Issue** box, enter the quantity of the item to issue.

To remove the item from the **Item Issued** grid, enter **0** (zero) in the **Correct Quantity to Issue** box.

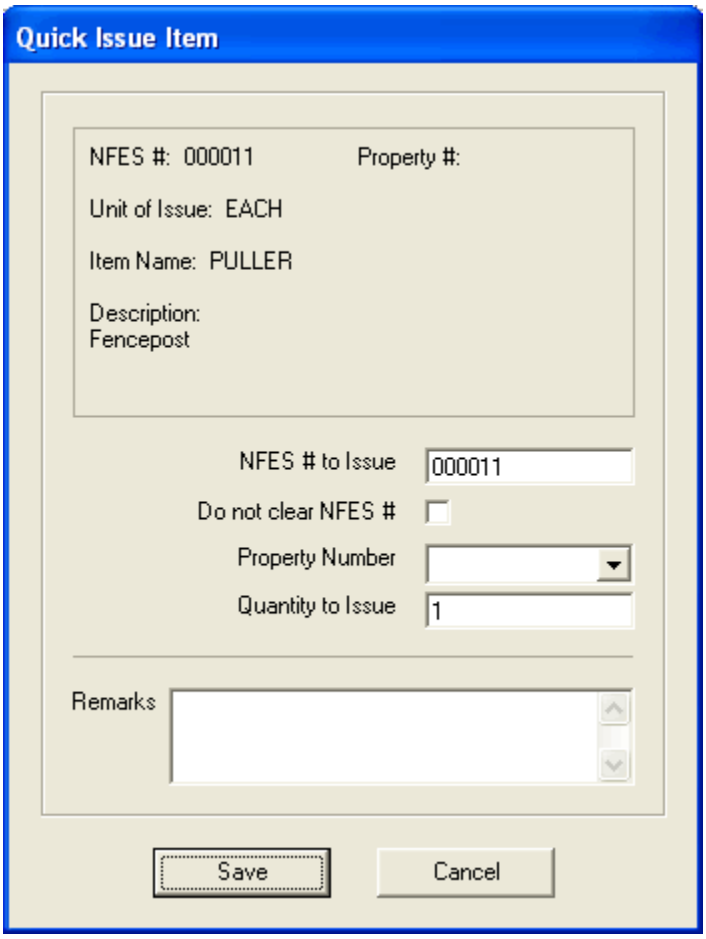
4. Click the **Save** button to change the quantity or remove the item.

Using Quick Issue

Use the **Quick Issue** option to quickly issue supply items to resources or locations.

To use this feature, you must know the **NFES** # of each item. The preceding 0's (zeroes) do not need to be entered. For example, "000154" can be entered as "154."

1. On the **Supply - Issue** window, select the **Resource** or **Location** to **Issue To**.
5. Under **Items for Issue**, click the **Quick Issue** button. The **Quick Issue Item(s)** window displays:



6. In the **NFES # to Issue** box, enter the appropriate NFES number.
7. 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.
8. If applicable, select a property number for the item from the **Property Number** drop-down list.
9. Enter the **Quantity to Issue**.

If a property number was assigned to the item, you cannot enter a quantity greater than 1.

7. Enter any comments about the item being issued in the **Remarks** box.
2. Click the **Save** button to save the items to the **Item Issued** grid.

The **Quick Issue Item(s)** window remains open after you save the new item count. This enables you to quickly add issue another item.

9. To enter additional items, repeat the steps 3 - 8.
8. 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.
9. To finish issuing, click the **Save Item(s)** button next to the **Items Issued** grid.

Issue Returns

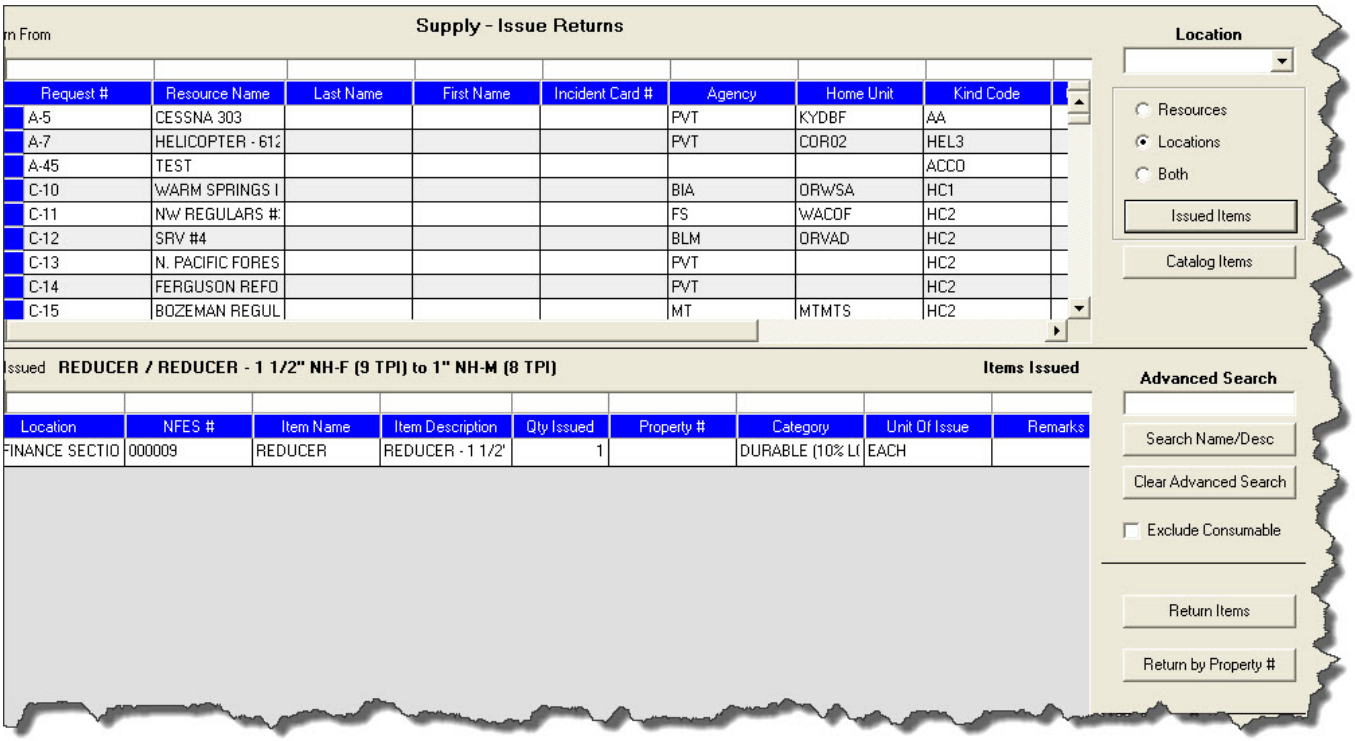
Follow the steps in this section to return supplies issued to a resource or location:

Use the filter buttons in the **Filter** toolbar to filter the grid and make it easier to find a Resource or Item.

Return Items

Follow the steps in this section to return items by selecting a **Resource** or a **Location** to which the items were issued:

1. Click the **Supply** button to open the **Supply** module.
10. On the **Supply Toolbar**, click the **Issue Returns** button to open the **Issue Returns** window:



11. In the upper grid, click to select the appropriate **Resource**, or select a location from the **Location** drop-down list. You can also use one of the **Alternative Methods** to populate the **Items Issued** grid See "Alternative Methods to Populate the Items Issued grid".

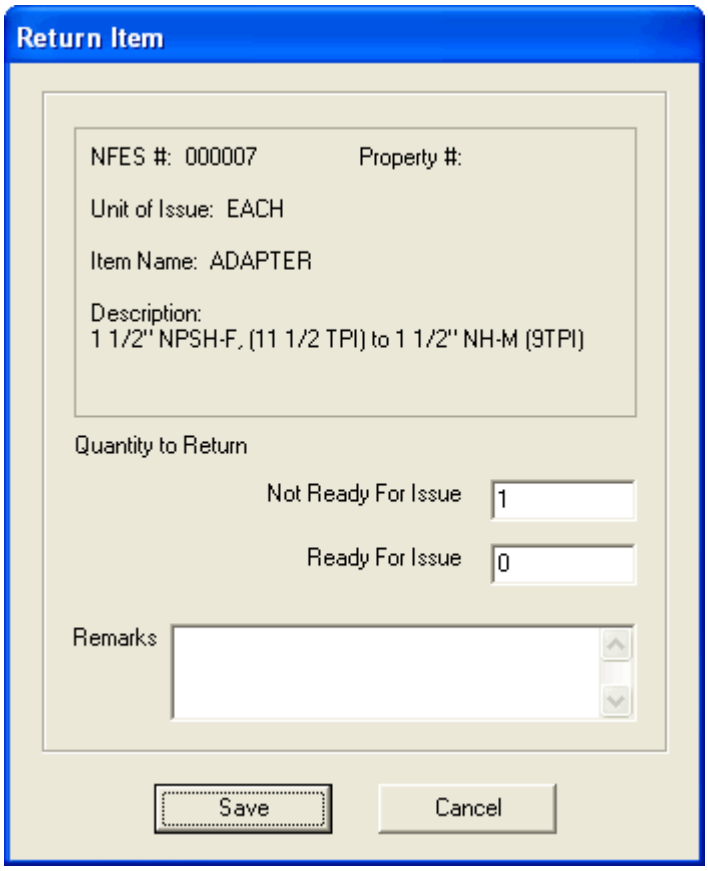
If your team is part of the **Supply Pilot**, you can scan a resource's incident card to select that resource when returning supplies.

Once a **Resource** or **Location** is selected, all items still issued to that **Resource** or **Location** will display in the **Items Issued** grid.

4. Under **Items Issued**, click to select the **Item** being returned.

5. Click the **Return Items** button to open the Return Item window.

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.

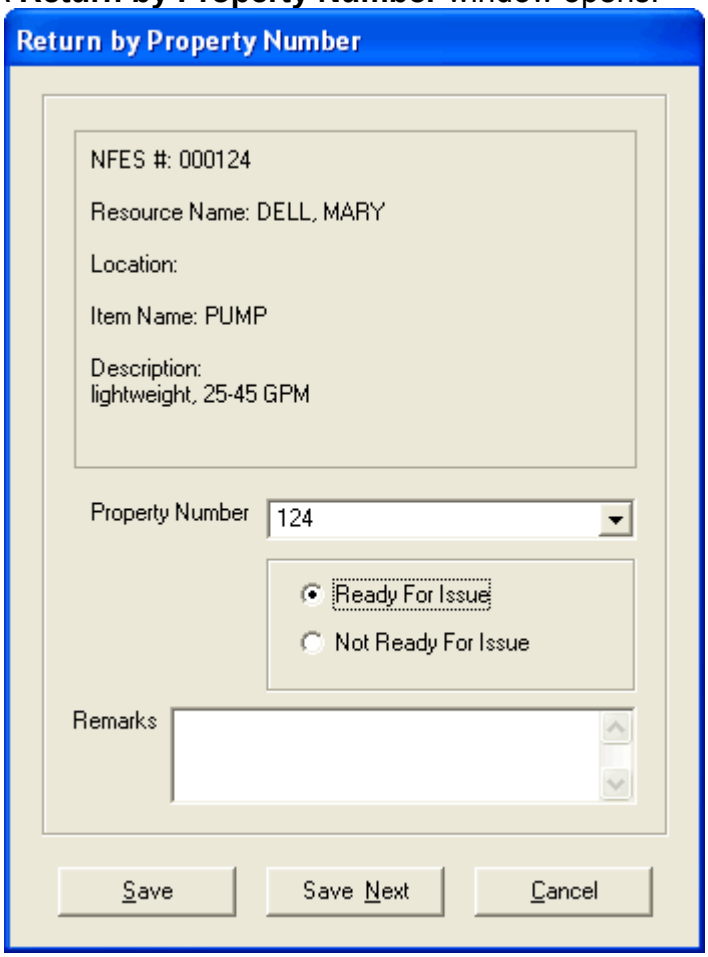


6. In the **Not Ready For Issue** box, enter the total quantity being returned that is not ready to issue.
6. In the **Ready for Issue** box, enter the total quantity being returned that is ready for issue.
7. Click the **Save** button to return the item.

Return by Property

Follow the steps in this section to return an item by that item's property number, regardless of the resource or location to which the item is issued.

1. Click the **Supply** button to open the Supply module.
7. On the **Supply Toolbar**, click the **Issue Returns** button to open the **Issue Returns** window.
8. Click the **Return by Property #** button that is located on the bottom right side of the window. A **Return by Property Number** window opens:



4. Select the property number assigned to the item you are returning from the **Property Number** drop-down list.
2. Identify whether the item is **Ready For Issue** or **Not Ready For Issue**.

Alternative Methods to Populate the Items Issued grid

1. To display items issued to a Resource only, select the **Resources** radio button and click the **Issued Items** button
5. To display items issued to a Location only, select the **Locations** radio button and click the **Issued Items** button.

6. To display items currently issued to Resources and Locations, click the **Both** radio button and click the **Issued Items** button.
7. To display all supply items currently listed in the supply catalog, click the **Catalog Items** button. Items will be displayed in the Items Issued grid.

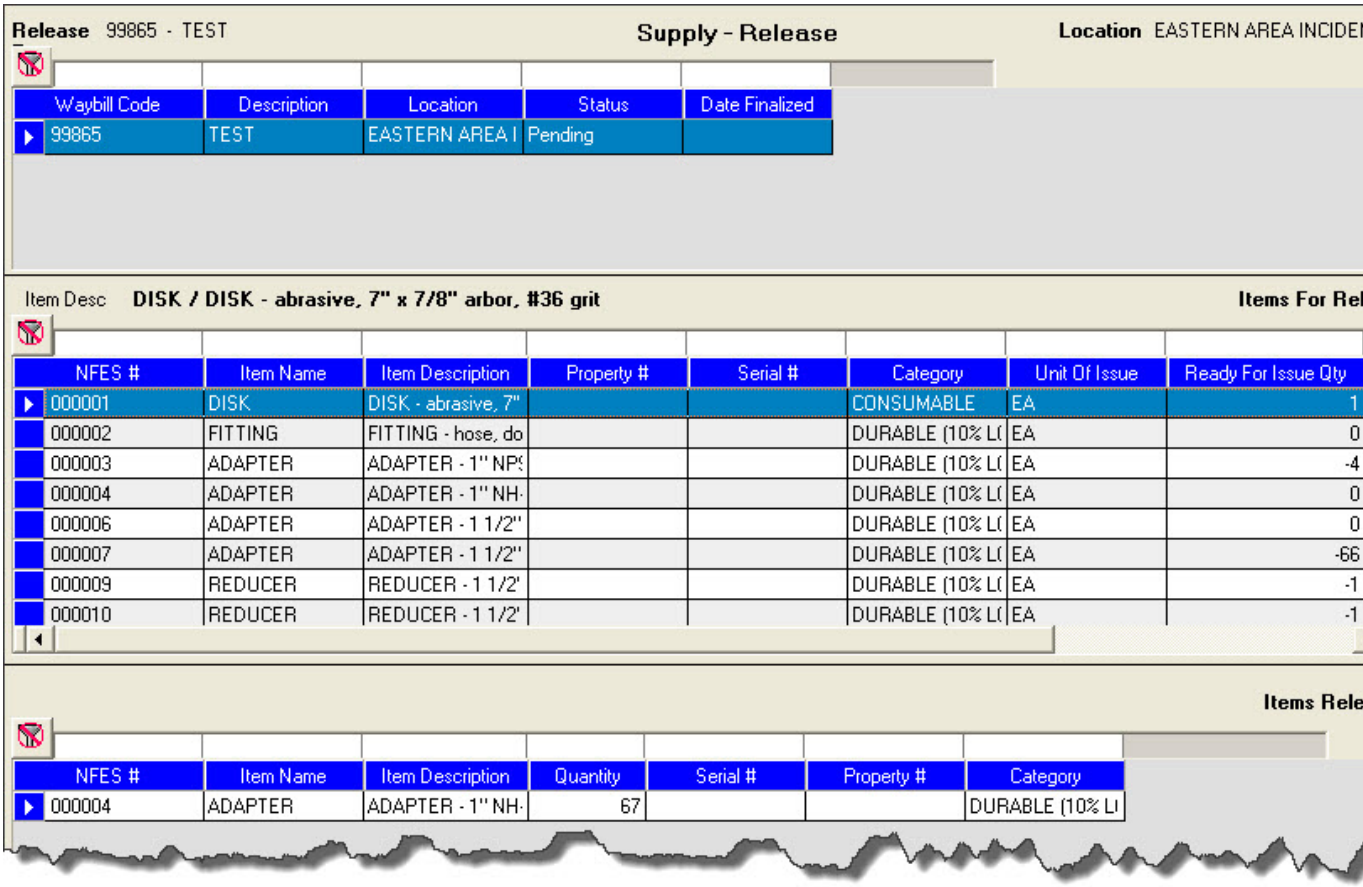
This will display only non-trackable items.

Release Supply Items

Follow the steps in this section to release supply items:

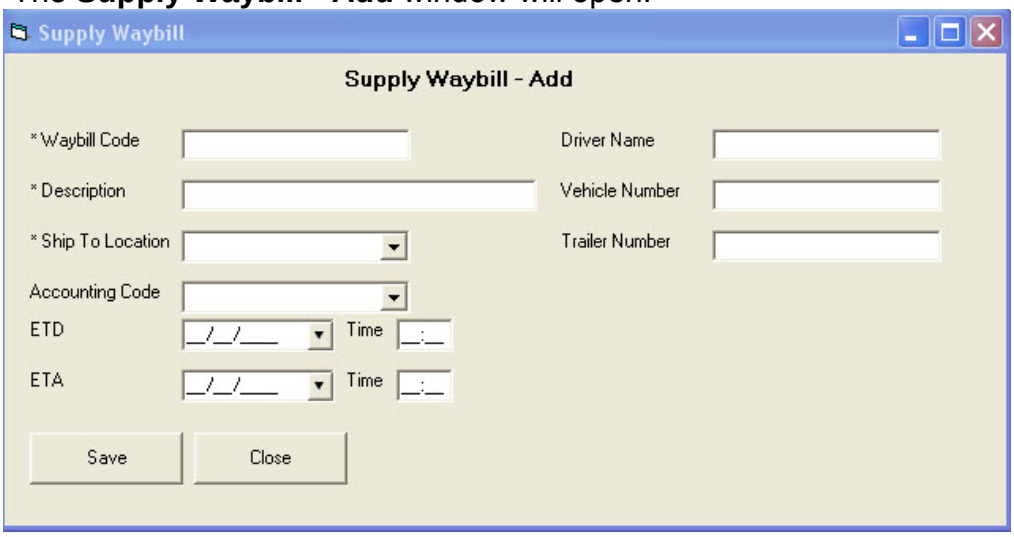
Use this feature to permanently release supply items to another location, such as a cache or another incident.

1. Click the **Supply** button to open the **Supply** module.
2. From the **Supply** menu, select **Release (Permanent)** to open the **Release** window:

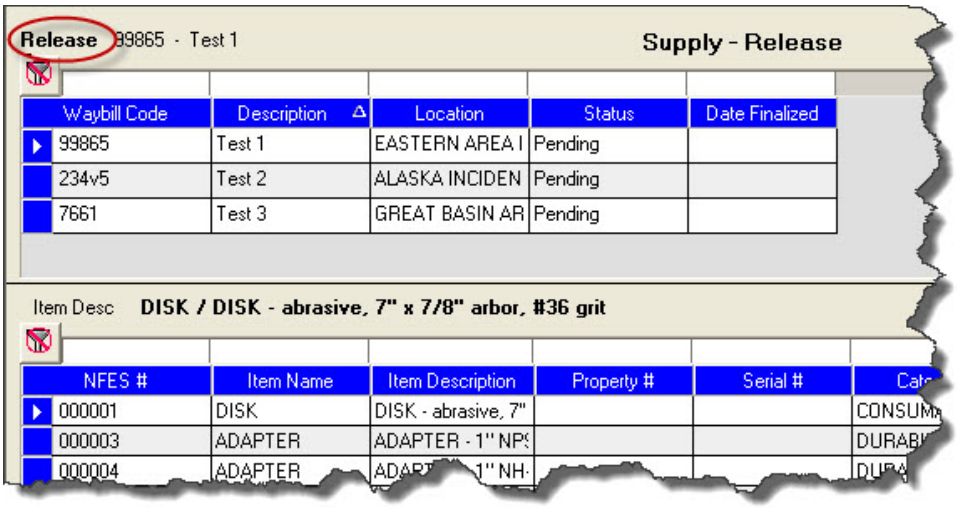


3. Select **Add Waybill** to create a new Waybill to assign supplies to.

4. The **Supply Waybill - Add** window will open.

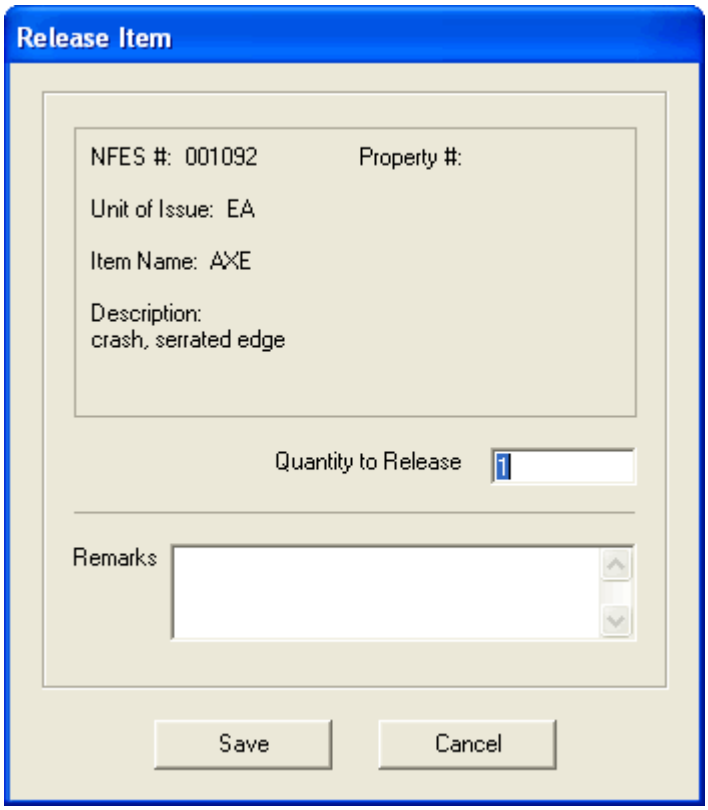


5. Enter the information that will appear on the Waybill. Fields marked with an asterisk (*) are required fields. When all information has been entered click **Save**. At this point you may add another Waybill or click **Close** to go back to the main screen.
6. The Waybill(s) now shows in the Release grid.



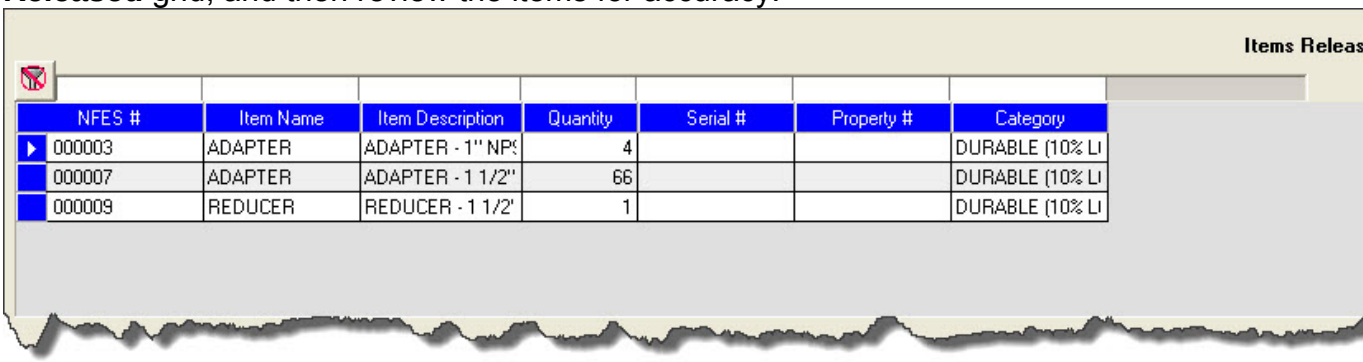
7. Next to the middle grid is the **Show Items** option. You can select to see **All** items or items **Only at Incident.**
8. In the middle grid, click to select the **Supply Item** to release. Then click the **Select Item** button to open the **Release Items** window. You can also double click the supply item to open the **Release Items** window.

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.

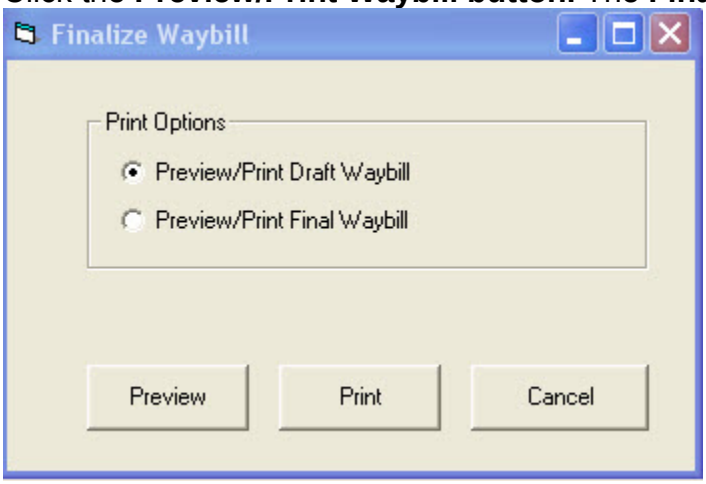


5. In the **Quantity to Release** box, type the total quantity to release.
2. In the **Remarks** box, type any applicable remarks.
3. Click the **Save** button to save the release information to the **Items Released** grid.

4. Repeat the previous steps until all items to release are included in the **Items Released** grid, and then review the items for accuracy.

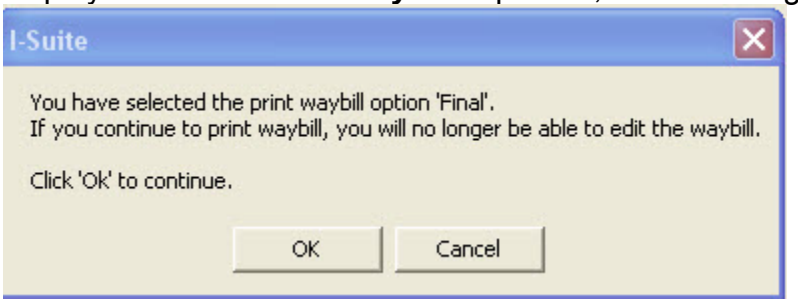


5. To edit the items identified for release, click the **Item** and then click the **Remove/Change Release** button next to the lower grid.
6. The **Remove/Change Release** window will open. Make the appropriate edits, or click **Remove** to delete the item. Click **Save** to close the window and return to the main screen.
7. Click the **Preview/Print Waybill button.** The **Finalize Waybill** window will open.

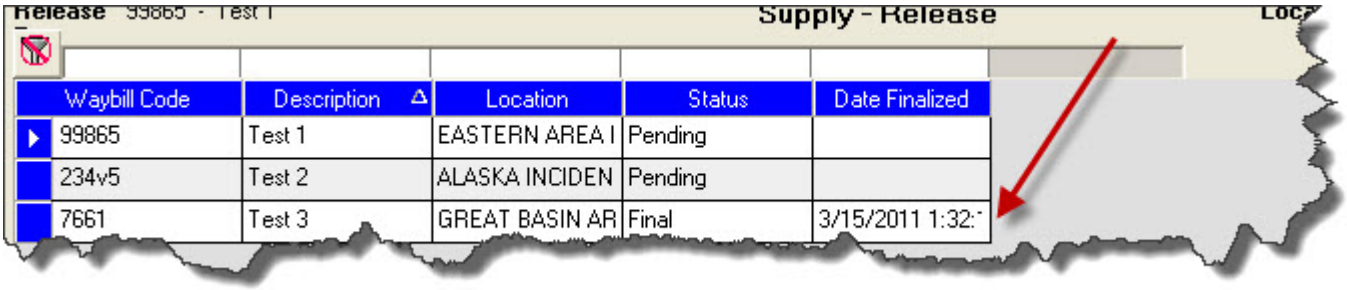


8. On the **Finalize Waybill** window there will be an option to **Preview/Print Draft Waybill** or **Preview/Print Final Waybill**. Select the appropriate option and click to **Preview**, **Print** or **Cancel** and return to the previous screen. If the **Draft** option is selected, the word DRAFT will appear on the Waybill, same with the Final option.

9. Once the option to **print** the **Final Waybill** is selected a confirmation window will display. Once the **Final Waybill** is printed, it can no longer be edited.



10. The **Finalized Waybill** will now show in the Release grid.

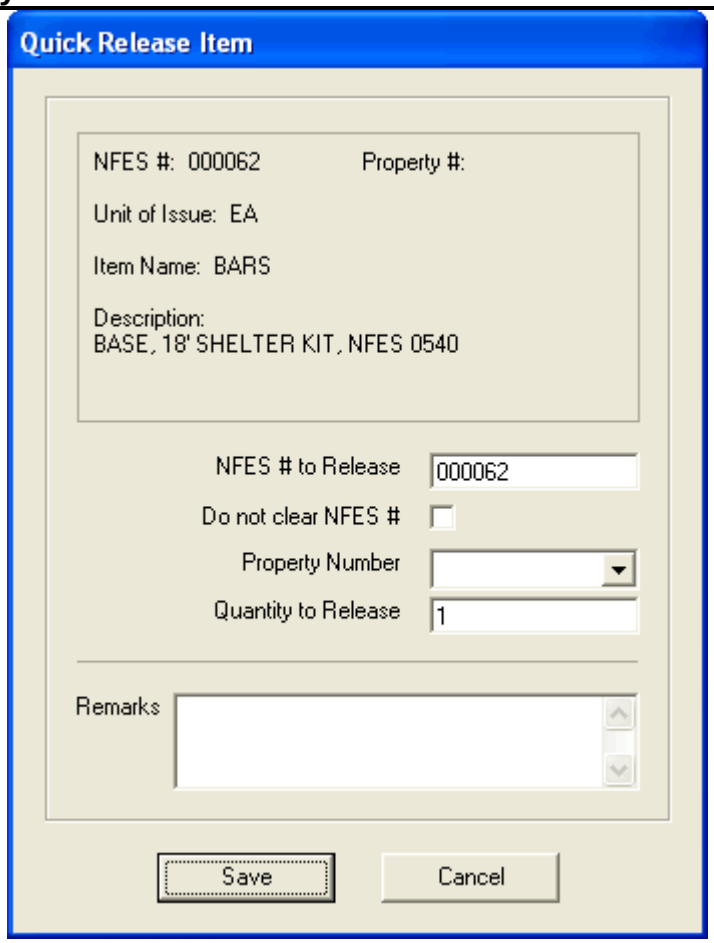


Using Quick Release Items

Follow the steps in this section to quickly release supply items:

To use this feature, you must know the **NFES** # of each item. The preceding 0's (zeroes) do not need to be entered. For example, "000154" can be entered as "154."

1. In the **Release** grid on the Supply - Release window, click the waybill to which you are releasing the items.
6. Click the **Quick Release** button to open the Quick Release Item(s) window.



3. In the**NFES # to Release** box, enter the appropriate NFES number.
2. 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.
3. If applicable, select a property number for the item from the **Property Number** drop-down list.
4. Enter the **Quantity to Release**.
5. Enter any comments about the item being issued in the **Remarks** box.
6. Click the **Save** button to save the items to the **Items Released** grid.

The **Quick Issue Item(s)** window remains open after you save the new item count. This enables you to quickly add issue another item.

9. To enter additional items, repeat the steps 3 - 8.
4. After all of the items have been added to the **Item Issues** grid, click the Cancel button, to close the **Quick Release Item(s)** window.

Change/Remove Released Item

If you need to change the quantity for a released item listed in the lower grid or remove it from the list, follow the steps in this section:

1. Click to select the incorrect item, and then click the **Remove/Change Release** button.
10. On the **Release Item(s)** window, change the quantity and remarks, as appropriate, and then click the **Save** button. To remove the item, click the **Remove** button.

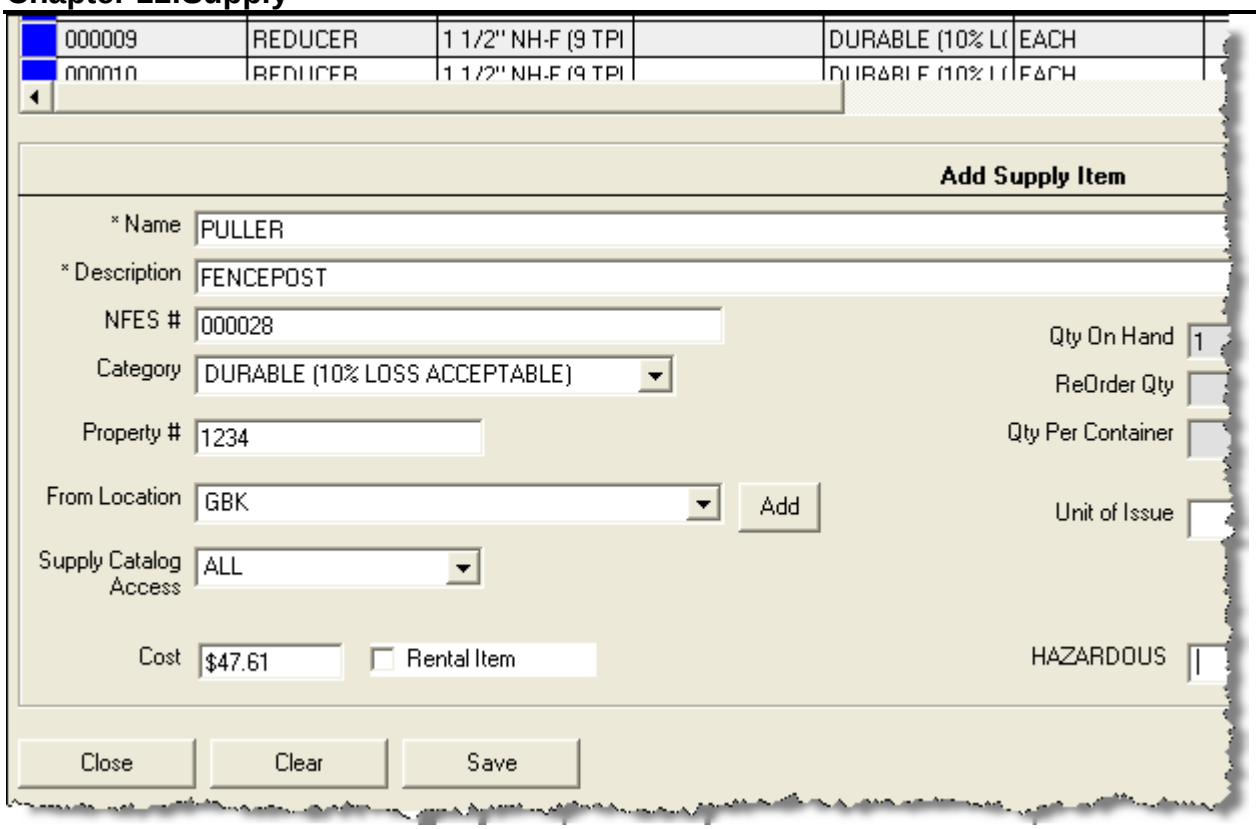
Add / Edit Supply Items

This section contains information on adding and editing supply items.

Adding Supply Items

Follow the steps in this section to add a Supply item to the I-Suite system:

1. Use one of the following methods to open the **Add Supply Item** window:
- From the **Supply** drop-down menu select the **Add/Edit Supply Item** option.
2. On the **Receive** window click the **Add Supply Item(s)** button.
3. On the **Issue** window click the **Add Supply Item(s)** button.
4. On the **Issue Returns** window click the **Add Supply Item(s)** button.
5. On the **Release** window click the **Add Supply Item(s)** button.
6. On the **Inventory** window, click the **Add Supply Item(s)** button.
2. On the **Supply - Add Supply Item** window, click the **Add** button.



3. In the **Name** box, type the name of the supply item. This information is required.
3. In the **Description** box, type a description of the supply item. This information is required.
5. In the **NFES #** box, type the National Fire Equipment System (NFES) number for the item.

The NFES number you enter must be unique.

6. From the **Category** drop-down list, select the category for the item.
6. In the **Property #** box, type the property number assigned to the item.
7. From the **From Location** drop-down list, select the location where the item originated.
8. 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**.

If the user has **Communications** rights, they cannot assign **Supply Only** to an item. They can only assign **Communications Only** or **All** to the item.

10. In the **Cost** box, type the cost of the item.
7. If the item is a rental, click to check the **Rental Item** checkbox.
8. In the **Qty On Hand** box, type the total number of the item currently available at the incident.

If a property number was assigned to the item, you cannot enter a quantity greater than

1.

13. In the **ReOrder Qty** box, type the quantity at which the item should be re-ordered.
11. From the **Qty Per Container** drop-down list, select the total quantity included in each container for the item.
12. From the **Unit of Issue** drop-down list, select the unit at which the item is issued.
13. If the item is a hazardous material, select the hazard type from the **Hazardous** drop-down list.
14. Type the item's measurements in the, **Weight-US (lbs)**, **Weight-Metric (kgs)**, or **Cubes (ft^3)** box.
15. In the **Remarks** box, type any applicable remarks for the item.
16. To save the **Supply Item**, click the **Save** button.
17. When you have finished adding all of the appropriate items, click the **Close** button to close the **Supply - Add Supply Item** window.

Editing a Supply Item

Follow the steps in this section to edit the information defined for a supply item:

1. Use one of the following methods to open the **Add Supply Item** window:
- From the **Supply** drop-down menu select the **Add/Edit Supply Item** option.
2. On the **Receive** window click the **Add Supply Item(s)** button.
3. On the **Issue** window click the **Add Supply Item(s)** button.
4. On the **Issue Returns** window click the **Add Supply Item(s)** button.
5. On the **Release** window click the **Add Supply Item(s)** button.
6. On the **Inventory** window, click the **Add Supply Item(s)** button.
2. Click one of the following buttons to filter the **Supply Item** grid at the top of the window:
- **All** - Displays all supply items.
3. **Non NFES** - Displays supply items without an NFES number.
4. **Only NFES** - Displays only supply items with an NFES number.
3. 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.

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.

4. You can make changes to the following information:
- Property #
5. From Location
6. Category
7. Supply Catalog Access

8. Qty On Hand
9. ReOrder Qty
10. Issue By Unit of Issue
11. Remarks
5. To save your changes, click the **Save** button.
- When you have finished editing all appropriate items, click the **Close** button to close the **Supply - Add Supply Item** window.

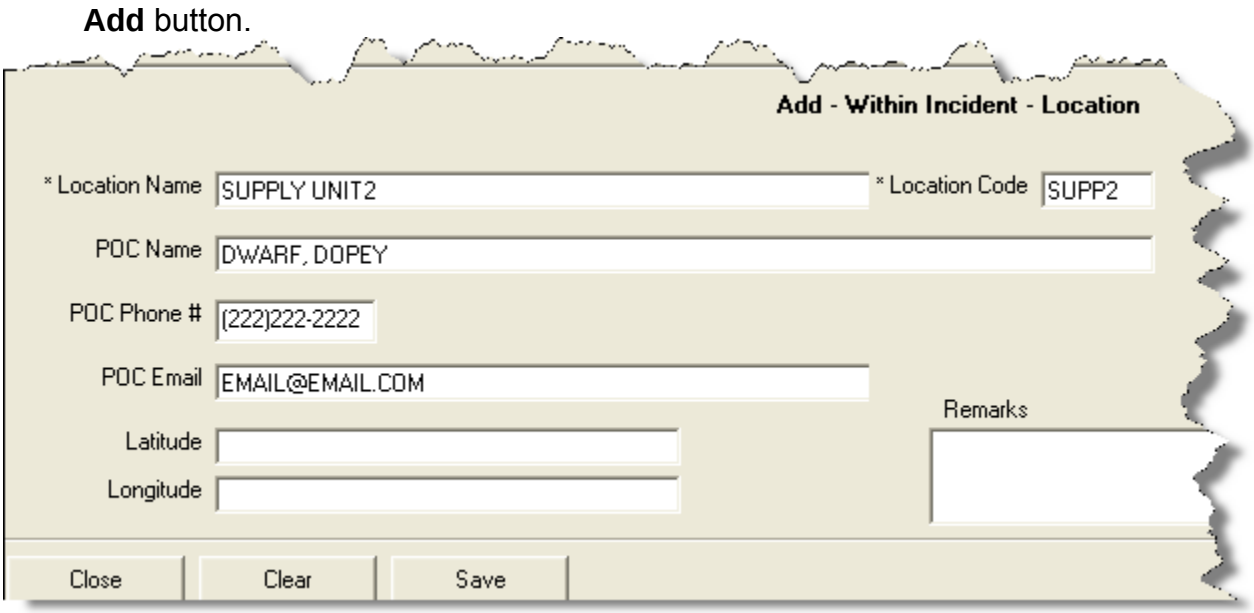
Add / Edit Locations

This section contains information on adding and editing locations.

Adding a Location - Within an Incident

Follow the steps in this section to add a location that is within an incident:

1. Use one of the following methods to open the **Add Location** window:
- From the **Supply** drop-down menu, select the **Add/Edit Locations** option.
2. On the **Receive** window click the **Add/Edit Location** button.
3. On the **Issue** window click the **Add/Edit Location** button.
4. On the **Release** window click the **Add/Edit Location** button.
2. On the **Add Location** window, click the **Within Incident** button, and then click the **Add** button.



3. In the **Location Name** box, type the name of the location. The **Location Name** is required.

3. In the **Location Code** box, type the code to assign to the location. The **Location Code** is required.
4. In the **POC Name** box, type the name of the point -of-contact at the location.
5. In the **POC Phone #** box, type the telephone number for the point-of-contact.
6. In the **POC Email** box, type the e-mail address for the point-of-contact.
7. In the **Latitude** box, type the latitude for the location.
8. In the **Longitude** box, type the longitude for the location.
9. In the **Remarks** box, type any remarks applicable to the location.
10. Click the **Save** button to save the location to the I-Suite system.
11. Click the **Close** button to close the **Add Location** window.

Editing a Location - Within an Incident

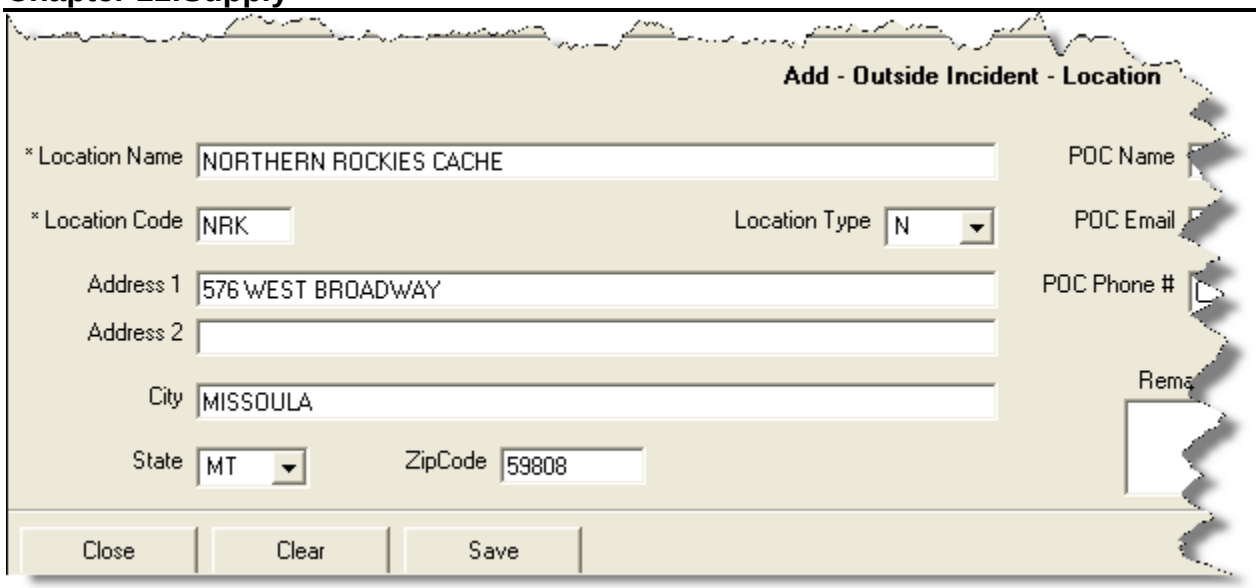
Follow the steps in this section to edit a location that is within the incident:

1. Use one of the following methods to open the **Add Location** window:
- From the **Supply** drop-down menu, select the **Add/Edit Locations** option.
2. On the **Receive** window click the **Add/Edit Location** button.
3. On the **Issue** window click the **Add/Edit Location** button.
4. On the **Release** window click the **Add/Edit Location** button.
2. On the **Add Location** window, click the **Within Incident** button.
- Click the location you want to edit in the grid at the top of the window.
- You can make changes to the following information:
- POC Name
3. POC Phone #
4. POC Email
5. Latitude
6. Longitude
7. Remarks
5. Click the **Save** button to save your changes.
- Click the **Close** button to close the Add Location window.

Adding a Location - Outside an Incident

Follow the steps in this section to add a location that is outside of an incident to the I-Suite system:

1. Use one of the following methods to open the **Add Location** window:
- From the **Supply** drop-down menu, select the **Add/Edit Locations** option.
2. On the **Receive** window click the **Add/Edit Location** button.
3. On the **Issue** window click the **Add/Edit Location** button.
4. On the **Release** window click the **Add/Edit Location** button.
2. On the **Add Location** window, click the **Outside Incident** button, and then click the **Add** button.



3. In the **Location Name** box, type the name of the location. The **Location Name** is required.
3. In the **Location Code** box, type the code to assign to the location. The **Location Code** is required.
4. From the **Location Type** drop-down list, select one of the following location types:

- **B** - Business Address

4. **L** - Local Cache Address
5. **N** - National Cache Address
6. **R** - Regional Cache Address
5. In the **Address 1**, **Address 2**, **City**, **State**, and **Zip** boxes, type the location's address.

- In the **POC Name** box, type the name of the point-of-contact at the location.
- In the **POC Email** box, type the e-mail address for the point-of-contact.
- In the **POC Phone #** box, type the telephone number for the point-of-contact.
- In the **Fax Phone #** box, type the fax number for the point-of-contact.
- In the **Remarks** box, type any remarks applicable to the location.
- To save the new **Location**, click the **Save** button.
- To close the **Add Location** window, click the **Close** button.

Editing a Location - Outside an Incident

Follow the steps in this section to edit a location that is outside of an incident:

1. Use one of the following methods to open the **Add Location** window:

- From the **Supply** drop-down menu, select the **Add/Edit Locations** option.

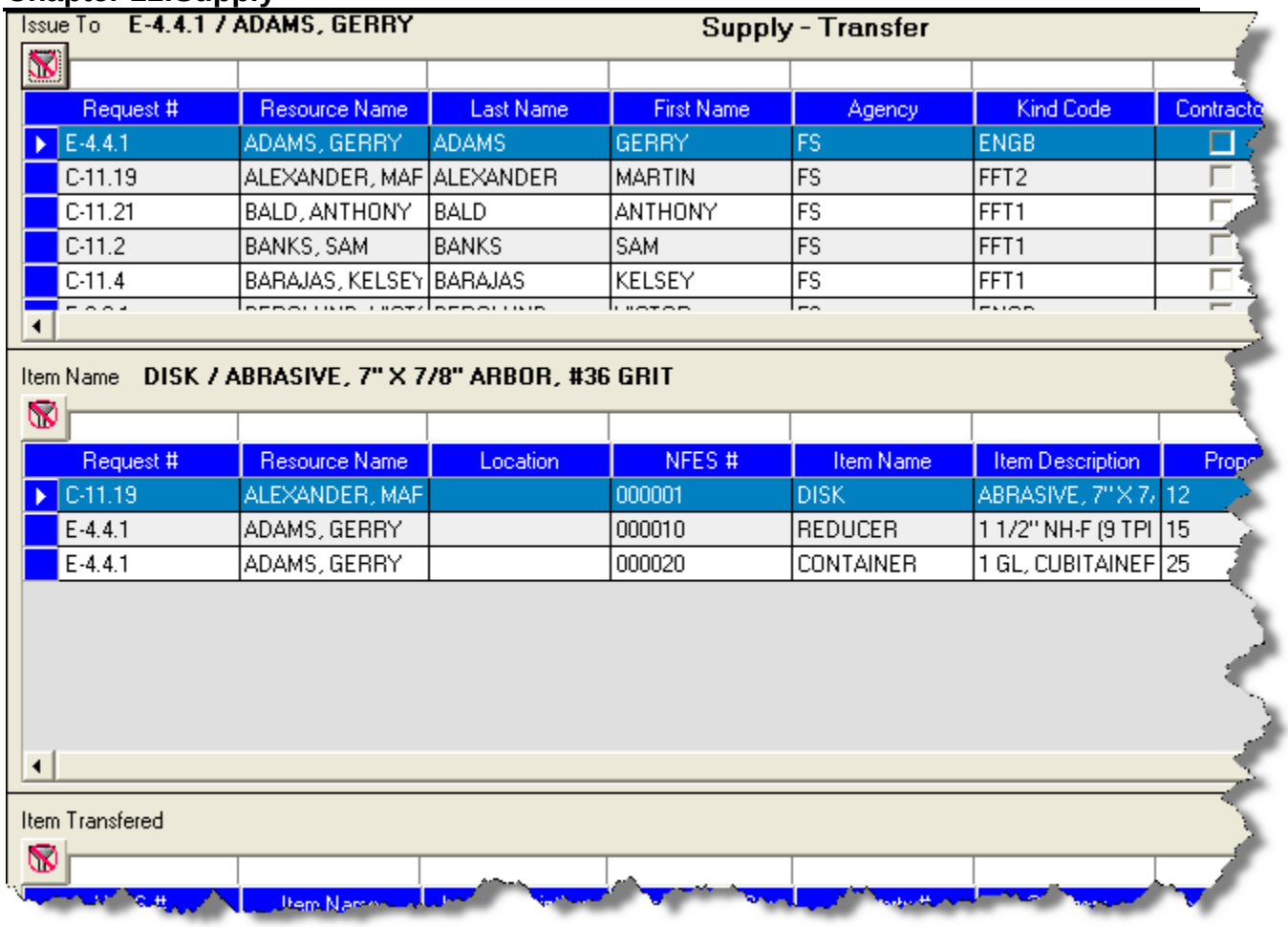
2. On the **Receive** window click the **Add/Edit Location** button.
3. On the **Issue** window click the **Add/Edit Location** button.
4. On the **Release** window click the **Add/Edit Location** button.

2. Click the **Outside Incident** button. Then click to select the location you want to edit in the grid at the top of the window.
- You can make changes to the following information:
- POC Name
3. POC Email
4. POC Phone #
5. Fax Phone #
6. Remarks
4. Click the **Save** button to save any changes you made.
- Click the **Close** button to close the **Add Location** window.

Transfer (at Incident)

This section identifies how to transfer a supply item to another resource at an incident. This option helps track a supply item that was issued to a resource and then, subsequently, given to a different resource at the incident.

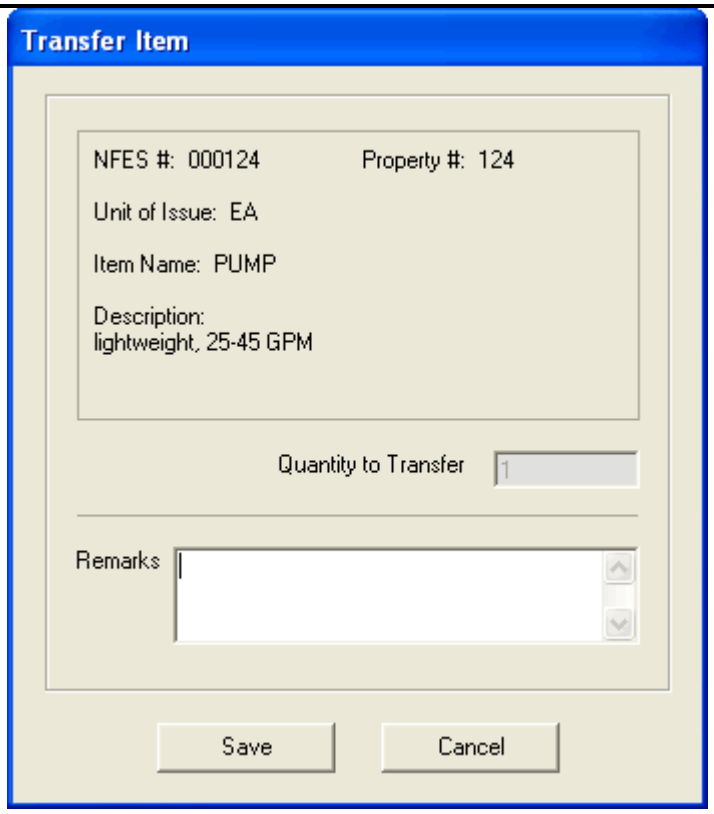
1. Click the **Supply** button to open the **Supply** module.
5. From the **Supply** drop-down menu, select the **Transfer (at Incident)** option to open the **Supply - Transfer** window.



3. Select the resource or location to which the item is being transferred:
a. To transfer to a resource, click the resource to which the item is being transferred in the **Issue To** grid.
4. To transfer to a location, rather than another resource, click the **UnSelect Resource** button and select a location from the **Location** drop-down list.
3. In the **Item Name** grid, click the item that is being transferred.

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.

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.
7. If there are multiple items being transferred to the selected person, repeat steps 4 - 7 for each item.
8. Click the **Transfer Item(s)** button to transfer the item(s) listed in the **Items Transferred** grid to the selected resource.
9. When the **Waybill** displays in the **Preview** window, click the **Print Report** button to print the **Waybill**.
10. When the **Print** window displays, click the **Print** button to print the **Waybill**.

Remove Transfer Item

Follow the steps in this section to remove an item from the Items Transferred grid:

1. Click the item you want to remove in the **Items Transferred** grid.
8. Click the **Remove Item** button to open the **Transfer Item** window.
9. Enter any applicable remarks in the **Remarks** box, and click the **Save** button. The item is removed from the **Items Transferred** grid.

Supply Inventory

This section identifies the steps for tracking the supply inventory.

When using the **Supply Inventory** option, it is a good practice to **Receive** all items into the **Supply** module before issuing them to resources. If you do not **Receive** the items into the **Supply** module, the inventory counts may not be correct. See "Receive Supply Items"

Manually Updating Inventory Counts

Follow the steps in this section to update **Inventory Counts** in the **Supply** module based on a manual count:

If you **Issued** items to resources before **Receiving** them into the **Supply** module, you can manually update the **Inventory Counts** by following the procedures outlined in this section.

1. Click the **Supply** button to open the **Supply** module.
2. From the **Supply** drop-down menu, select the **Inventory** option to open the **Supply - Inventory** window.

Items to Inventory

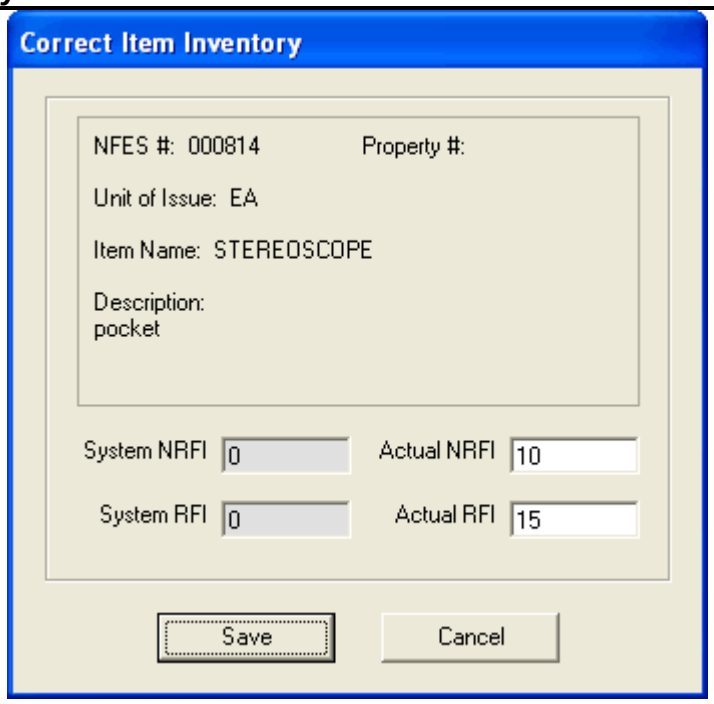
NFES #	Item Name	Item Description	Property #	Category	Unit Of Issue	Ready Fo
	CHOCOLATE	DARK CHOCOLAT				
000001	DISK	abrasive, 7" x 7/8"		CONSUMABLE	EA	
000002	FITTING	hose, double male,		DURABLE (10% L(	EA	
000003	ADAPTER	1" NPSH-F,(11 1/2		DURABLE (10% L(	EA	
000004	ADAPTER	1" NH-F,(9 TPI) to ˜		DURABLE (10% L(	EA	
000006	ADAPTER	1 1/2" NH-F, (9 TP		DURABLE (10% L(	EA	
000007	ADAPTER	1 1/2" NPSH-F, (11		DURABLE (10% L(	EA	
000009	REDUCER	1 1/2" NH-F (9 TPI		DURABLE (10% L(	EA	
000010	REDUCER	1 1/2" NH-F (9 TPI		DURABLE (10% L(	EA	
000011	PULLER	Fencepost		DURABLE (10% L(	EA	

Corrected Inventory Items

NFES #	Item Name	Item Description	Property #	System Ready For Issue	Reported Ready For
000002	FITTING	hose, double male,			
000004	ADAPTER	1" NH-F,(9 TPI) to ˜		0	
000013	AXE	brush, Swedish knif			

3. In the **Items to Inventory** grid, click the supply item that needs corrections made to the inventory count.
2. Click the **Correct Item Inventory** button to open the **Correct Item Inventory** window.

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.

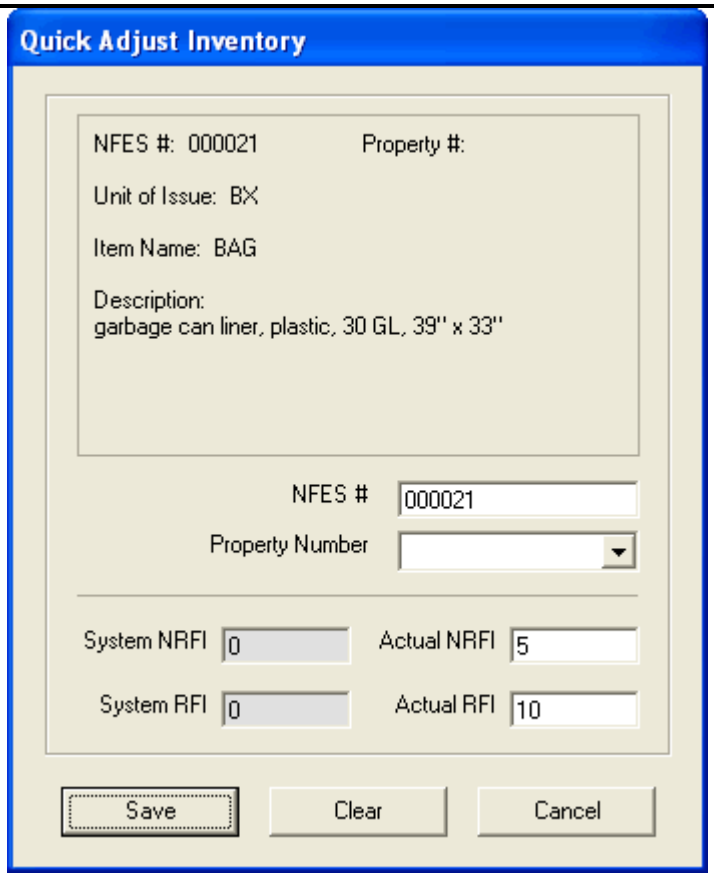


5. In the **Actual NRFI** box, type the total number of items that are **Not Ready For Issue**.
4. In the **Actual RFI** box, type the total number of items that are **Ready For Issue**.
5. Click the **Save** button to save the counts to the **Corrected Inventory Items** grid.
6. Repeat steps 3 - 7 for each supply item that needs corrections made to the inventory count.
7. 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.

Quick Adjust Inventory Item Counts

Follow the steps in this section to quickly update **Inventory** counts in the **Supply** module:

1. Click the **Supply** button to open the **Supply** module.
6. From the **Supply** drop-down menu, select the **Inventory** option to open the **Supply - Inventory** window.
7. Click the **Quick Inventory** button to open the **Quick Adjust Inventory** window.



4. In the **NFES** box, type the NFES number for the item that needs corrections made to the inventory count.
2. If appropriate, select a property number from the **Property Number** drop-down list.
6. In the **Actual NRFI** box, type the total number of items that are **Not Ready For Issue**.
5. In the **Actual RFI** box, type the total number of items that are **Ready For Issue**.

If a property number was assigned to the item, you cannot enter a quantity greater than 1.

8. Click the **Save** button to save the item counts to the **Corrected Inventory Items** grid.

The **Quick Adjust Inventory** 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.
9. 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** window.

10. Click the **Save** button that displays on the right side of the window to save the corrected inventory counts.

Advanced Search

The **Advanced Search** function allows you to limit the grid so only those items with a defined term in their name or description display. Follow the instructions in this section to use the **Advanced Search** feature to search for supply items.

The **Advanced Search** option is available on the Issue, Issue Returns, Receive, Transfer, Inventory and Release windows.

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.

Supply Reports

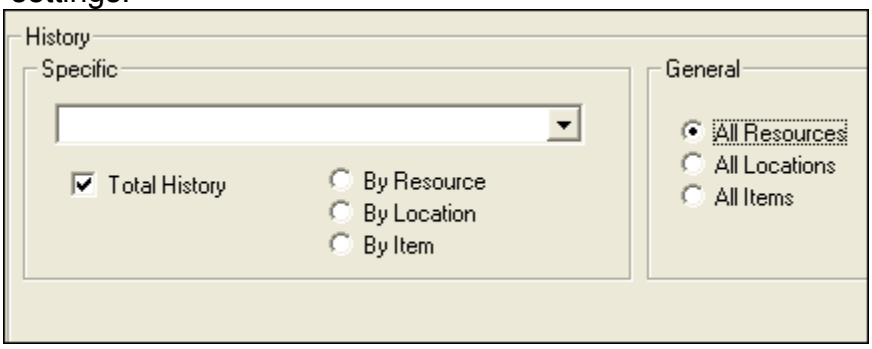
Follow the steps in this section to print standard **Supply** reports.

1. Click the **Supply** button to open the **Supply** module.
4. On the **Toolbar**, click the **Reports** button to open the **Supply Reports** window.
3. Click to select one of the following reports:
- History See "Supply History Report"
4. Inventory See "Inventory Reports"
5. Reprint Waybill See "Reprinting a Waybill"
6. Supplies Currently Issued To

Supply History Report

Follow the steps in this section to print a Supply History Report:

1. On the **Supply Reports** window, click the **History/Inventory** option to display the **History** settings.



2. If you want to print the report for a specific **Resource**, **Location** or **Item**, click the appropriate option under **Specific**. Then select the resource, location or item from the drop-down list.

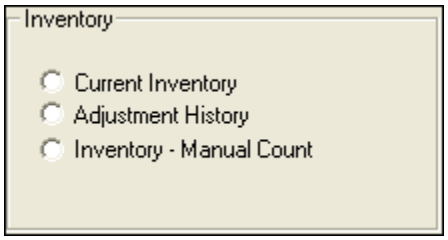
   If you want to print the report for ALL **Resources**, **Locations** or **Items**, click the appropriate option under **General**.
2. To include the total history of the resource, location or item, click to check the **Total History** checkbox.
3. To preview and then print the report, click the **Preview** button. When the Preview window displays, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
4. When the **Print** window displays, click the **Print** button.

Inventory Reports

Follow the steps in this section to print Inventory reports:

1. On the **Supply Reports** window, click the **History/Inventory** option to display the **Inventory** settings.



2. Click one of the following options to print the identified report:

- **Current Inventory** - This report is a listing of all of the supply items currently at the incident.

3. **Adjustment History** - This report contains a history of all Inventory Adjustments by NFES#.
4. **Inventory - Manual Count** - This report contains a list of the current inventory and inventory amounts defined in I-Suite. The report includes sections where you can write down the correct inventory if the actual inventory is different from what is defined in I-Suite.
3. To preview and then print the report, click the **Preview** button. When the Preview window opens, click the **Print Report** button.

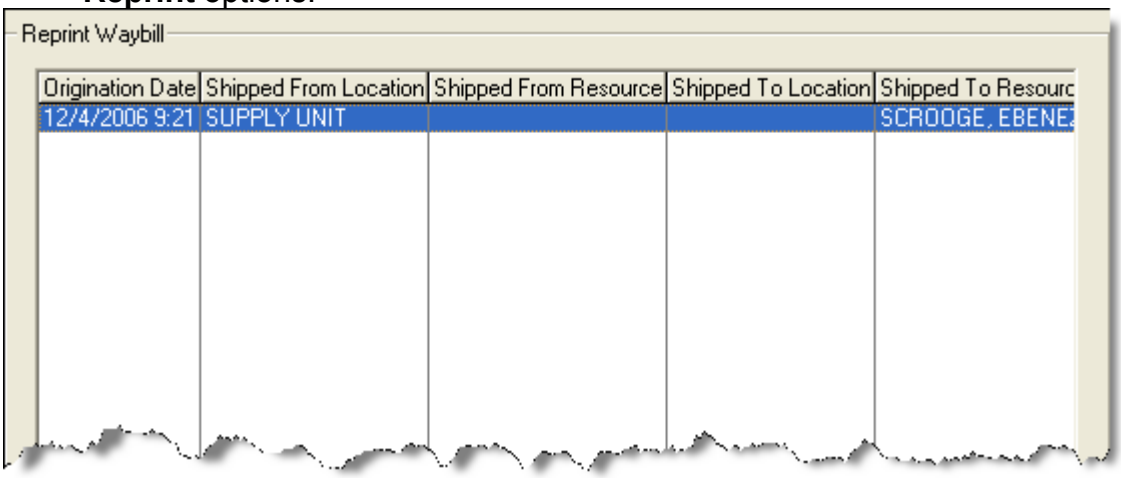
   To print the report without first previewing it, click the **Print** button.

- When the **Print** window opens, click the **Print** button.

Reprinting a Waybill

Follow the steps in this section to reprint a Waybill:

1. On the **Supply Reports** window, click the **Reprint Waybill** option to display the **Reprint** options.



2. Click the **Waybill** you want to reprint under **Reprint Waybill**.
2. Click the **Preview** button to view the **Waybill** in the **Preview** window.
3. Click the **Print Report** button to print the **Waybill** from the **Preview** window. When the **Print** window displays, click the **Print** button.

Supplies Currently Issued To

Follow the steps in this section to print a list of supplies that are currently issued to one or more resources:

1. Open the **Supply-Issue** or **Issue Returns** window.

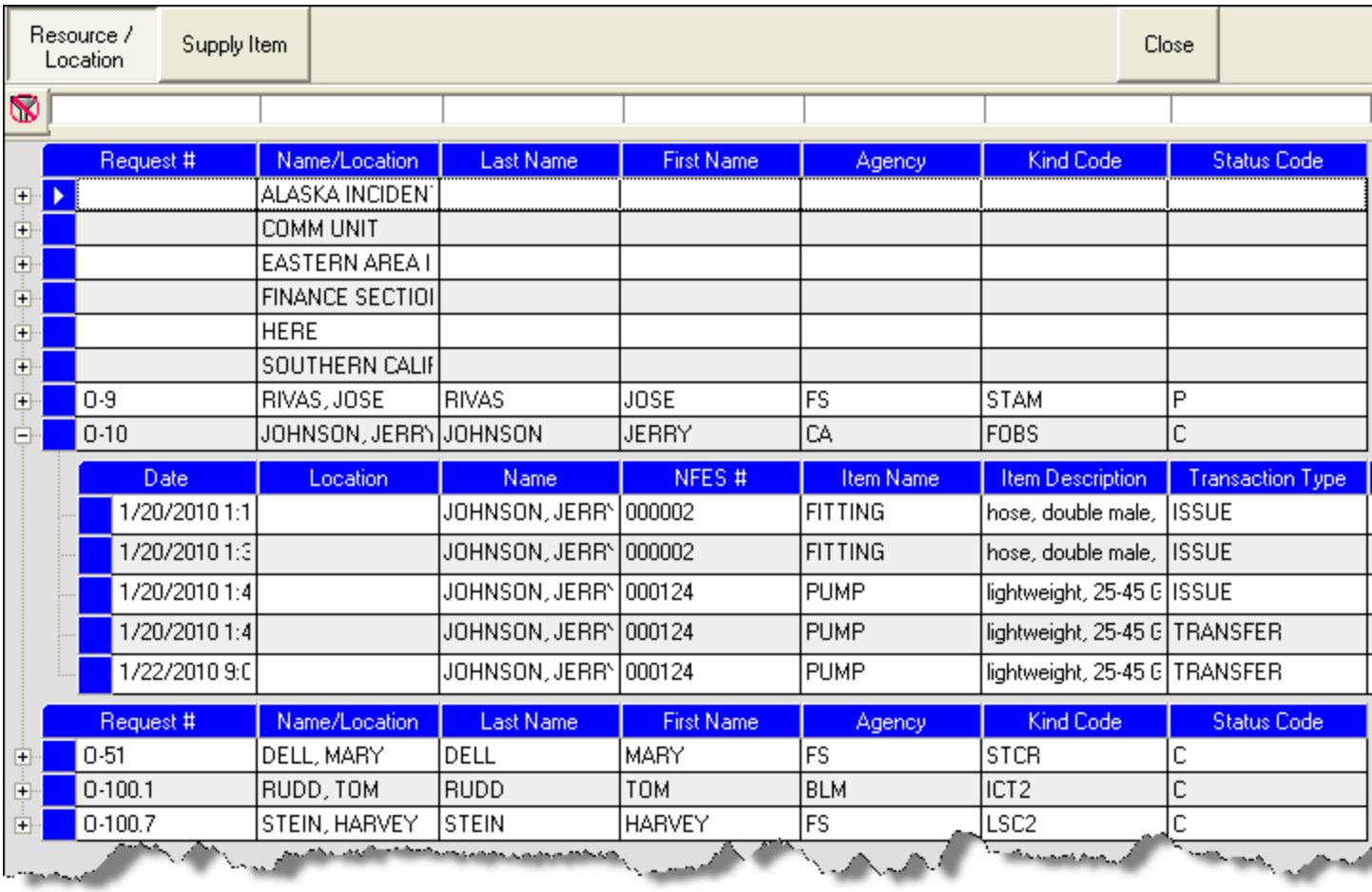
3. Click one or more resources in the **Issue To** grid or select a location from the **Location** drop-down list.
4. Click the **Issue Report** button.

View Supply History

The View Supply History function allows you to view a history of Supply transactions to occur for the selected incident. This includes issuing supplies, receiving supplies, transferring supplies, releasing supplies and returning supplies. You can view the history either by Resource and Location or by Supply Item.

Follow the steps in this section to view a Supply History:

1. Click the **View History** button in the Supply toolbar to display the Supply History window.



2. To view the history by resources and location, click the **Resource/Location** button.
2. To view the history by supply items, click the **Supply Item** button.

3. Click the plus sign (**+**) next to a resource, location or a supply item to display a list of transactions.
4. When you have finished viewing the history, click the **Close** button to return to the main Supply window.

Supply Revision History

Revision Date	Revision Summary
2011-03-01	Revised instructions for the 11.01.00 version of I-Suite.
2010-04-27	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised instructions for the 9.01.00 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Revised instructions for the 7.01.00 version of I-Suite
2006-12-04	Revised instructions by adding more detail and graphics.
2006-06-12	Revised instructions for the 6.02 version of I-Suite.
2006-05-01	Instructions for new features of the Supply module.
2006-04-17	Instructions for new module of the new I-Suite 2006 application.

Injury/Illness

The Injury/Illness section Manual explains how to use the Injury/Illness module to track injuries and illness for resources during an incident.

Topics in this guide include the following:

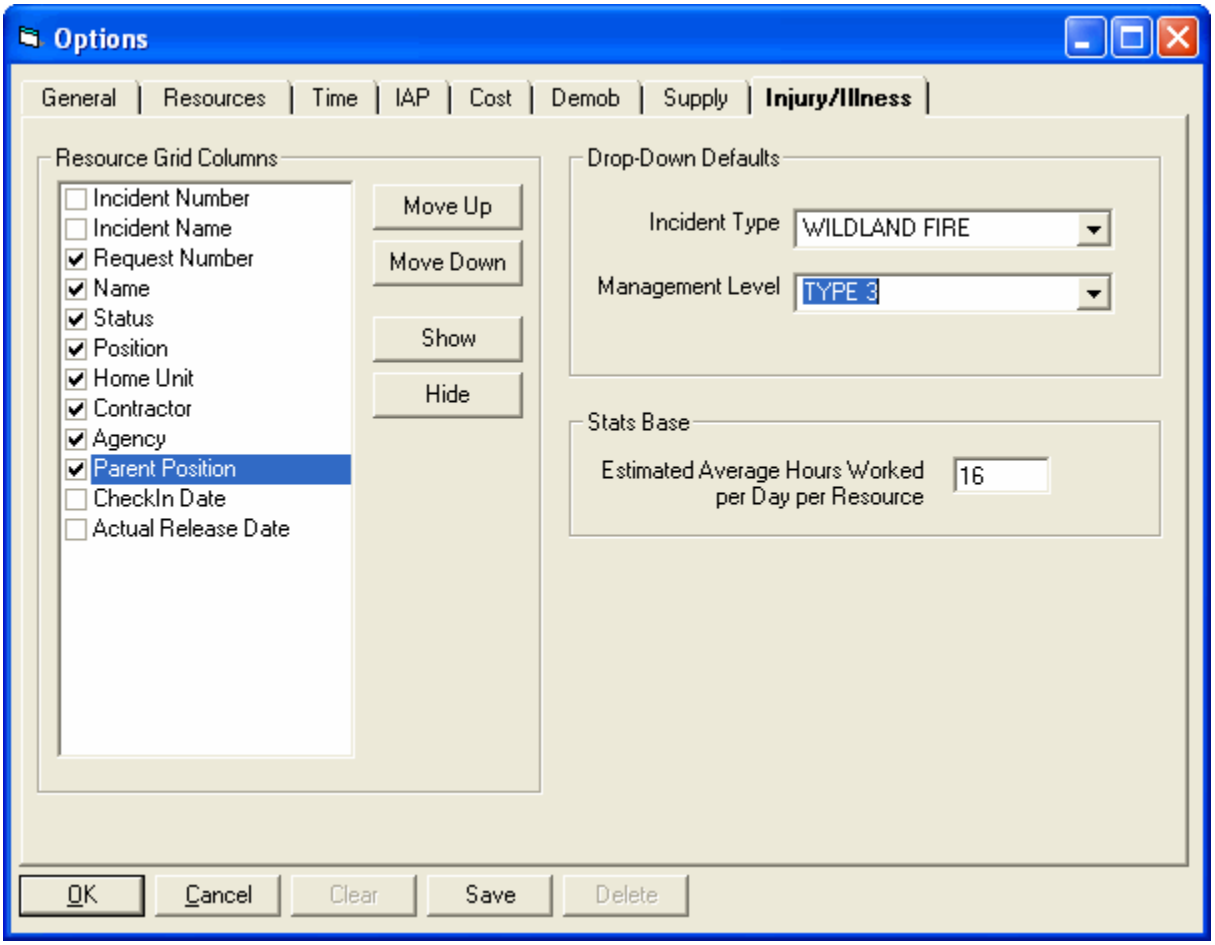
- See "Common Features"
3. See "Selecting Injury/Illness Options"
4. See "Adding an Injury/Illness"
5. See "Advanced Search"
6. See "Editing an Injury/Illness"
7. See "Deleting Injury/Illness"
8. See "View History"
9. See "Stats Base"
10. See "Injury/Illness Reports"
11. See "Creating an Injury/Illness Export File"

Selecting Injury/Illness Options

Follow the steps in this section to select the options to use in the Injury/Illness area of the I-Suite application:

1. From the **Tools** drop-down menu, select **Options** to open the **Options** window.
- Click the **Injury/Illness** tab.

You can also click the **Defaults** button on the **Injury/Illness** window to open the **Options** window with the **Injury/Illness** tab selected.



3. Under **Resource Grid Columns**, hold down the **Ctrl** key and click to highlight each of the columns you want to select.
2. If you want to remove the selected columns from the **Resource** grid, click the **Hide** button.

   If you want to display the selected columns in the **Resource** grid, click the **Show** button

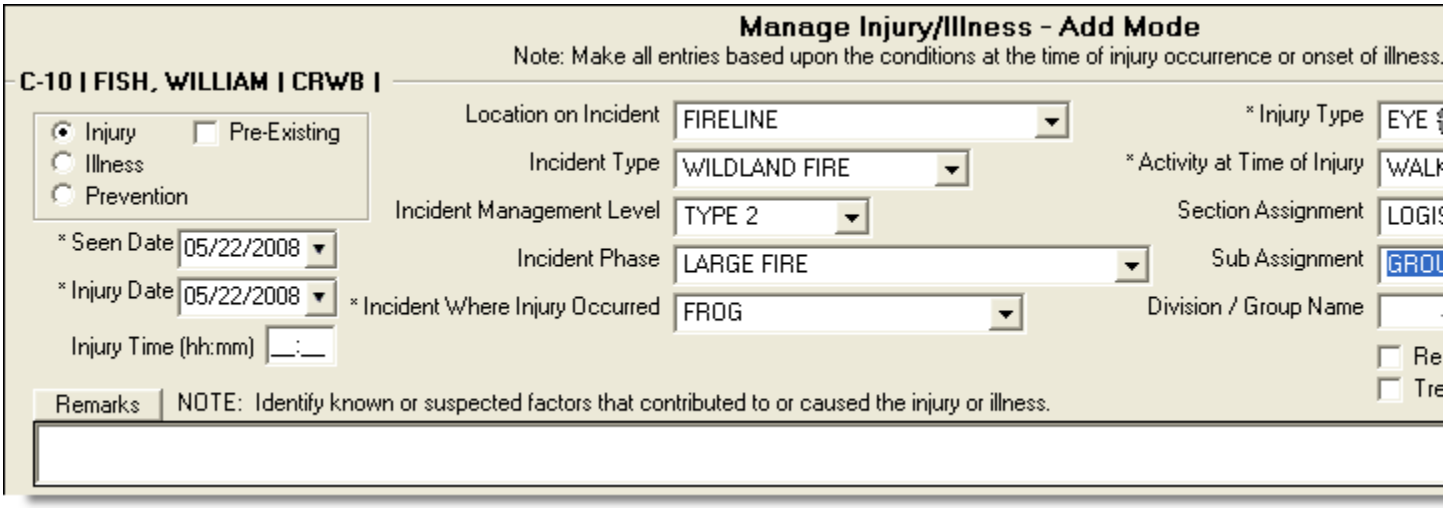
Each column with a checkmark in the checkbox next to it is included in the grid. When you click the **Show** button, it places a checkmark in the checkbox next to the selected column. When you click the **Hide** button, it removes the checkmark from the checkbox. You can also click the checkbox next to a listed column to either **Show** or **Hide** it.

5. To define a default **Incident Type** to display in the **Incident Type** box on the **Injury/Illness** window, select one of the following options from the **Incident Type** drop-down list:
- All Hazard
6. Prescribed Fire
7. Wildland Fire
8. Wildland Fire Use
6. To define a default **Management Level** to display in the **Management Level** box on the **Injury/Illness** window, select a level (1-5) from the **Management Level** drop-down list.
- To define a default **Est. Hrs Worked / Day** on the **Stats Base** window, enter the amount in the **Estimated Average Hours worked per Day per Resource** box.
- Click the **Save** button to save your changes. Click the **OK** button to close the **Options** window.

Adding an Injury/Illness

Follow the steps in this section to add an injury, illness or prevention record:

1. From the **Modules** drop-down menu, select the **Injury/Illness** option to open the **Injury/Illness** window.
7. In the **Resources** grid, click the resource for which you are adding the injury, illness or prevention record. The **Manage Injury/Illness - Add Mode** area at the bottom of the window becomes active.



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 item.

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 changes to **Illness Date**.

4. If the injury or illness was pre-existing, click to check the **Pre-Existing** checkbox.
4. 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.
5. In the **Injury/Illness/Prevention Date** box, enter the date when the injury or illness first occurred. If this is a prevention item, enter the date when the resource first needed the item. You can either type the date or select it from the drop-down calendar.
6. In the **Injury/Illness/Prevention Time** box, enter the time when the injury or illness occurred. If this is a prevention item, enter the time when the resource needed the item.
7. 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 item, select the resource's location when they needed the preventative item.
8. From the **Incident Type** drop-down list, select the appropriate type of incident.

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.

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.
10. 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 item, select the incident where the item is needed.

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 list, select the appropriate injury or illness.

When **Prevention** is selected, the **Injury/Illness Type** box does not display on the window. Enter any applicable information about the **Prevention** in the **Remarks** area.

13. From the **Activity at Time of Injury/Illness/Prevention** drop-down list, select the activity the resource was performing when the injury illness occurred. If this is a prevention item, select the activity for which the item is needed.

13. From the **Section Assignment** drop-down list, select the appropriate section assignment.
14. From the **Sub Assignment** drop-down list, select the appropriate sub-assignment.

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.
14. If there was restricted duty or lost time because of the illness or injury, click to check the **Restricted Duty/Lost Time** checkbox.
15. If the resource was seen off-site for the injury or illness, click to check the **Treatment Off-Site** checkbox.
16. 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 item, type a description of the item and any other applicable information in the Remarks area.

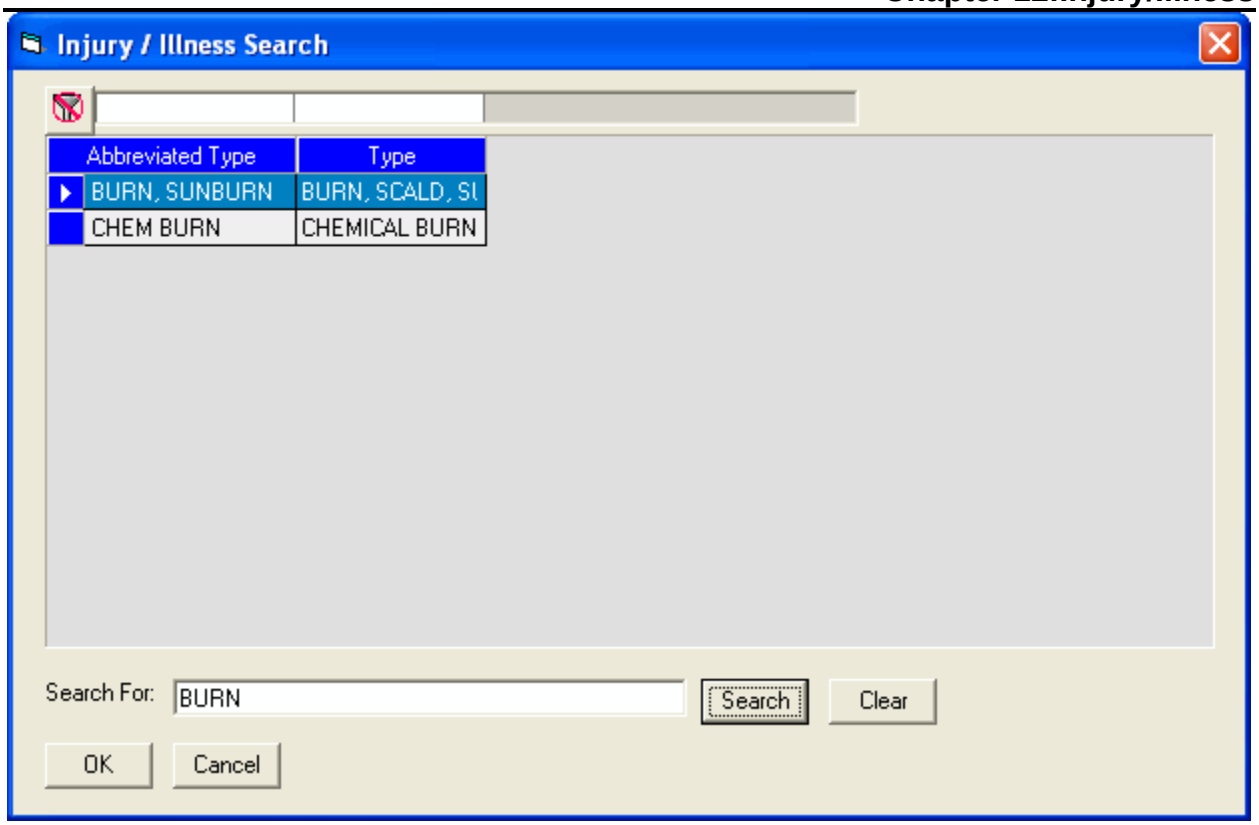
If your remarks will not fit in the **Remarks** box, click the **Remarks** button to display a **Remarks** window where you can enter additional remarks.

20. Click the **Save** button to save the injury, illness or prevention record. Notice that the saved record displays in the grid at the bottom of the window.
17. When the **Data Saved** window displays, click the **OK** button to close the window.

Advanced Search

Follow the steps in this section to perform an advanced search for an Injury or Illness Type:

1. In the Manage Injury Illness area, click the **Search** button that displays next to the **Injury/Illness Type** box to open the Injury/Illness Search window.



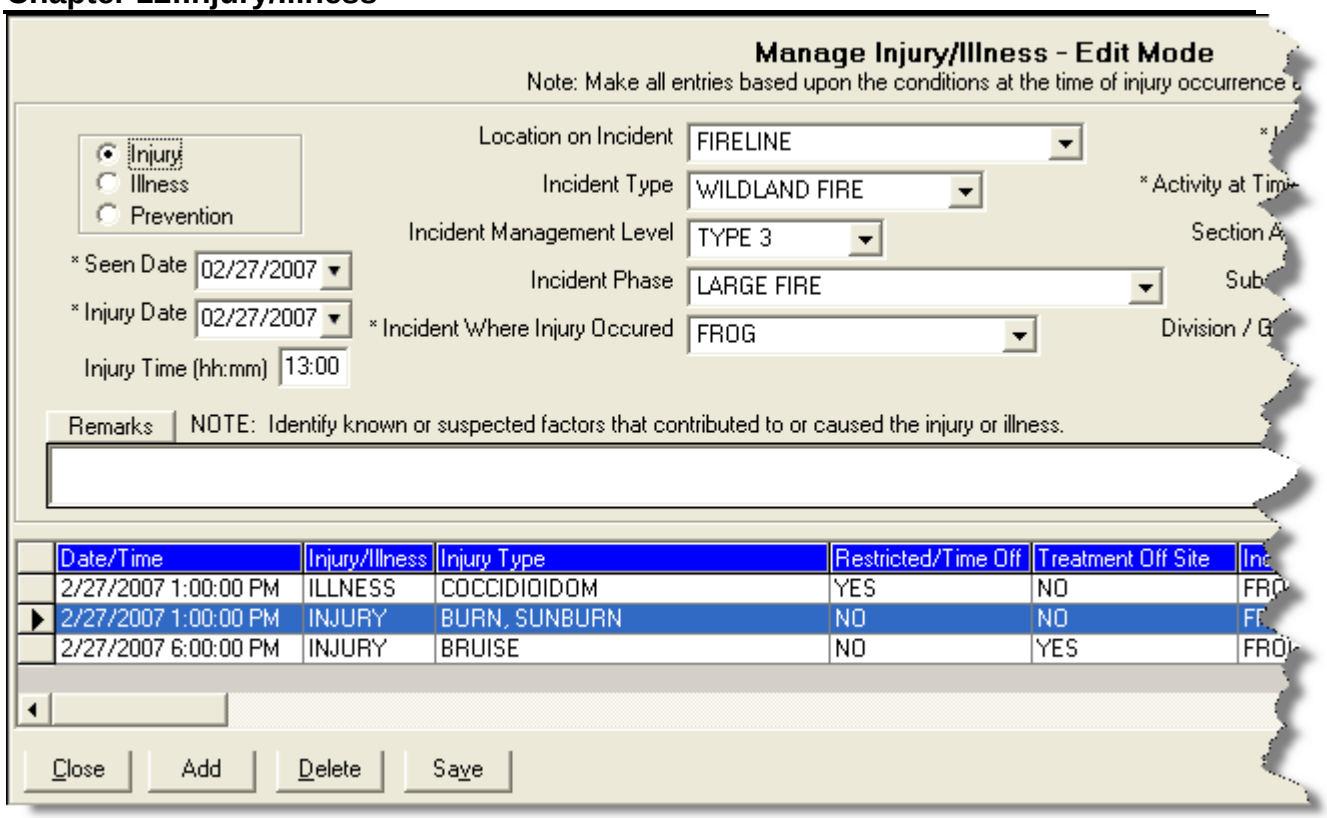
2. In the **Search For** box, type the name of the injury or illness that you want to find.
2. Click the **Search** button to limit the grid to only list those items with a search term. (e.g. If you enter "Burn," only those items with burn in the name display in the grid.)
3. In the grid at the top of the window, click the appropriate type.
4. Click the **OK** button to close the **Injury/Illness Search** window and insert the highlighted type into the **Injury/Illness Type** box.

You can also double click a type in the grid to close the **Injury/Illness Search** window and insert the type into the **Injury/Illness Type** box.

Editing an Injury/Illness

Follow the steps in this section to edit an injury, illness or prevention record:

1. From the **Modules** drop-down menu, select the **Injury/Illness** option.
3. In the **Resources** grid, click the appropriate resource.
4. In the **Injury/Illness/Prevention** grid at the bottom of the window, click the record you want to edit. The record's information displays under **Manage Injury/Illness - Edit Mode**.



4. Make the appropriate changes to the injury/illness or prevention information.

If you change the **Injury**, **Illness** or **Prevention** selection, the entry in the **Injury/Illness Type** box is removed. You must select a new Injury/Illness type from the **Injury/Illness Type** drop-down list. If you do not select a new type, an error message will display indicating that you must define an **Injury/Illness Type** before saving the record.

5. Click the **Save** button to save the changes.

The record you are editing remains selected until you select another injury, illness or prevention record or select another resource.

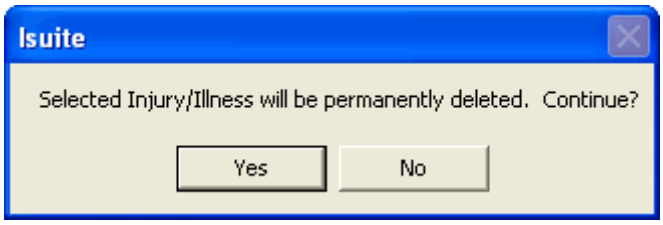
To add a new injury, illness or prevention record, click the **Add** button at the bottom of the window.

Deleting Injury/Illness

Follow the steps in this section to delete Injury/Illness records:

1. From the **Modules** drop-down menu, select the **Injury/Illness** option.
6. In the **Resources** grid, click the appropriate resource.
7. In the **Injury/Illness/Prevention** grid at the bottom of the window, click the record you want to delete.

8. Click the **Delete** button at the bottom of the window. A confirmation window displays

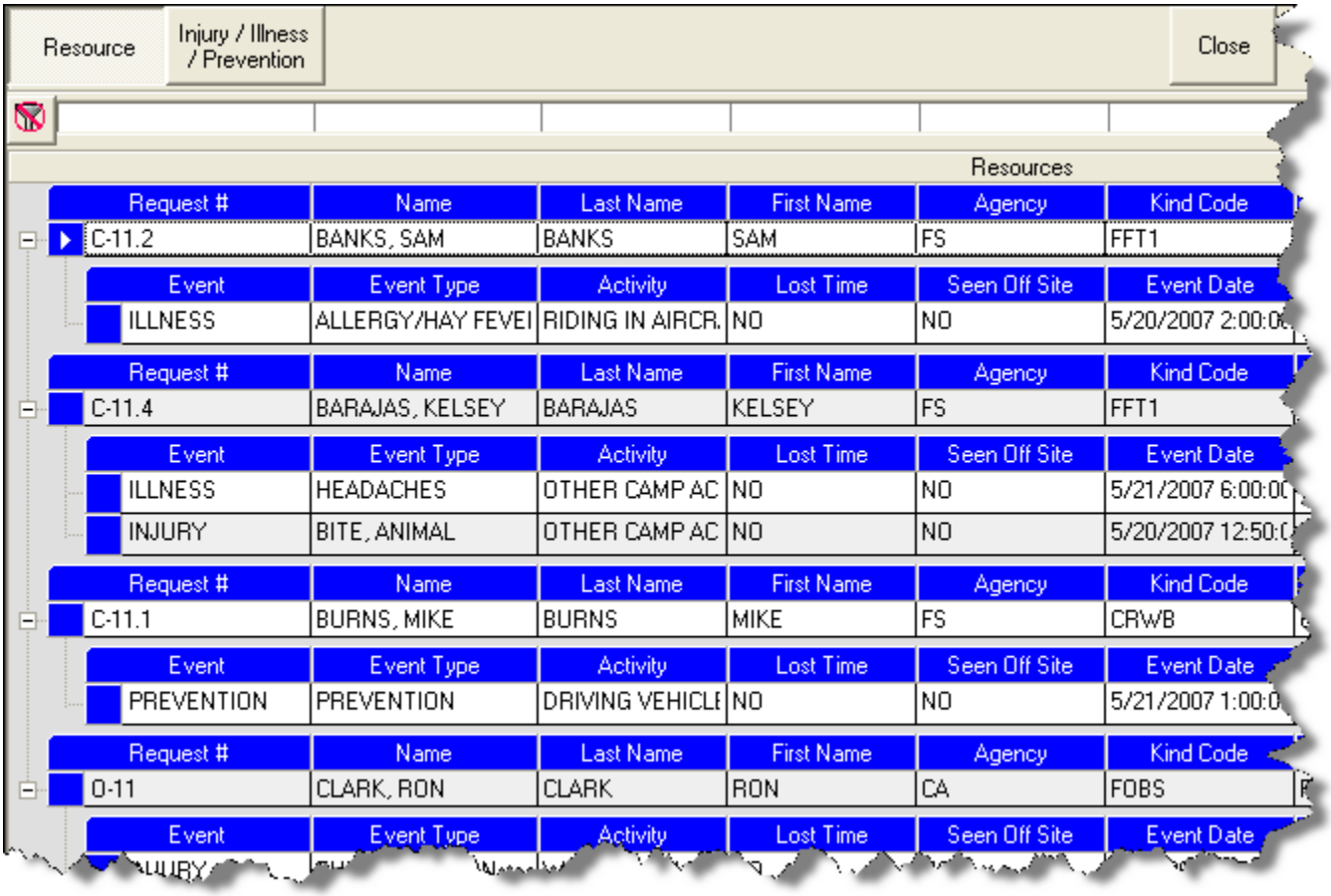


5. Click the **Yes** button to remove the injury, illness or prevention record.

View History

Follow the steps in this section to view a history of injury/illness records:

1. From the **Modules** drop-down menu, select the **Injury/Illness** option.
6. Click the **View History** button in the **Injury/Illness** toolbar to open the history window.



3. Click the **Resource** button to sort the grid based on resources with injury, illness or prevention records.

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.

4. Click the **Injury/Illness/Prevention** button to sort the grid based on injury, illness and prevention records.

When **Managing Incidents Separately**, the grid only includes those injures 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.

5. Click the **Close** button when you have finished viewing the history.

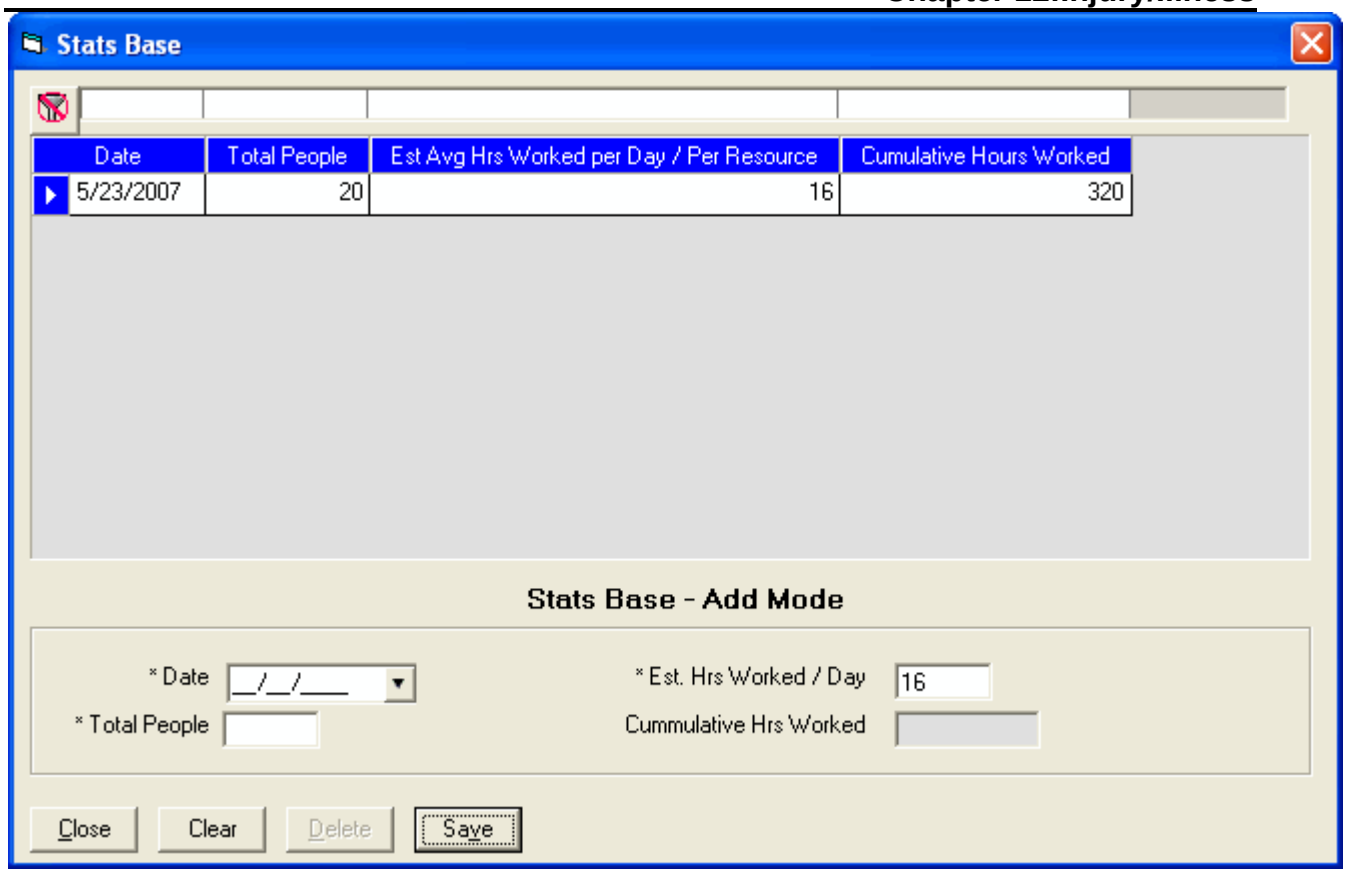
Stats Base

Follow the steps in this section to define the Stats Base to use with Injuries and Frequency Report:

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.

1. From the **Modules** drop-down menu, select the **Injury/Illness** option.
6. Click the **Stats Base** button in the **Injury/Illness** toolbar to open the **Stats Base** window.

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.



3. 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.

If a default **Estimated Average Hours Worked per Day per Resource** was defined on the **Options** window, that amount displays in the **Est. Hrs Worked / Day** box. If needed, you can change this amount by typing over the amount.

6. Click the **Save** button.
4. When the **Data Saved** window displays, click the **OK** button to close the window.

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

Injury/Illness Reports

Follow the steps in this section to print Injury/Illness Reports:

1. From the **Modules** drop-down menu, select the **Injury/Illness** option to open the **Injury/Illness** module.
7. In the **Main** toolbar, click the **Reports** button to open the **Injury/Illness Reports** window.
8. In the **Reports** frame, click to select one of the following reports:

- Injury/Illness by Type See "Injury/Illness by Type"

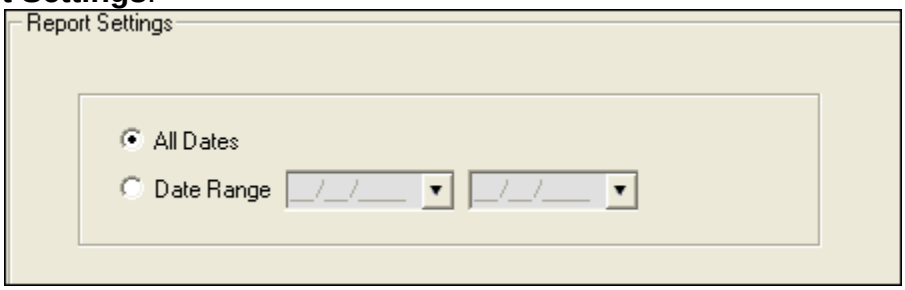
2. Injury/Illness Prevention See "Injury/Illness/Prevention"
3. Injury/Illness by Date See "Injury/Illness by Date"
4. Injuries and Frequency See "Injuries and Frequency"
5. Medical Unit Daily Summary See "Medical Unit Daily Summary"
6. Injury/Illness Types See "Injury/Illness Types Report"

Injury/Illness by Type

This report identifies the total number of injuries, illnesses and preventions currently defined in I-Suite. The information is broken down by injury/illness type.

To generate an Injury/Illness by Type report, complete the following steps:

1. On the Injury/Illness Reports window, click **Injury/Illness by Type** to display the **Report Settings**:



2. Click one of the following options to identify the dates to include in the report:

- **All Dates** - Includes all dates in the report.

3. **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
3. To preview and then print the report, click the **Preview** button. When the Preview window opens, click the Print Report button.

   To print the report without first previewing it, click the **Print** button.

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

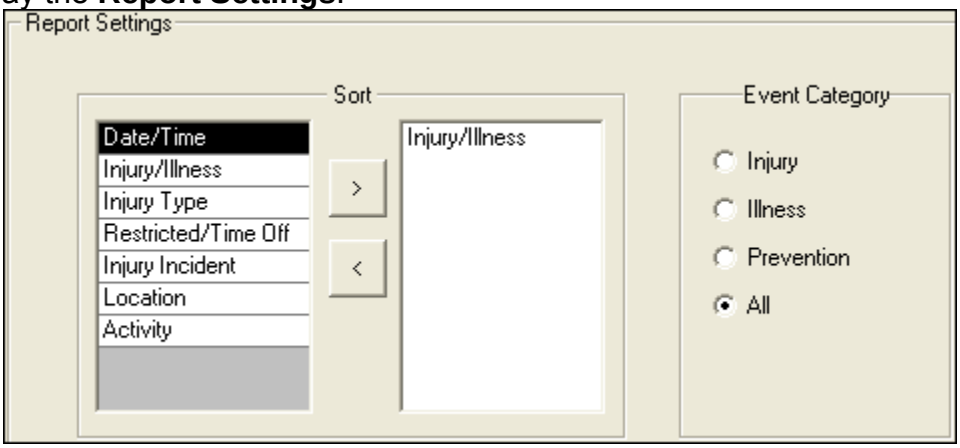
Injury/Illness/Prevention

This report includes detailed information about injury, illness or prevention records.

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, complete the following steps:

1. On the Injury/Illness Reports window, click the **Injury/Illness Prevention** option to display the **Report Settings**.



2. 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.
2. 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.

3. **Illness** - Only includes Illness records in the report.
4. **Prevention** - Only includes Prevention records in the report.
5. **All** - Includes Injury, Illness and Prevention records in the report.
4. To preview and then print the report, click the **Preview** button. When the Preview window opens, click the Print Report button.

   To print the report without first previewing it, click the **Print** button.

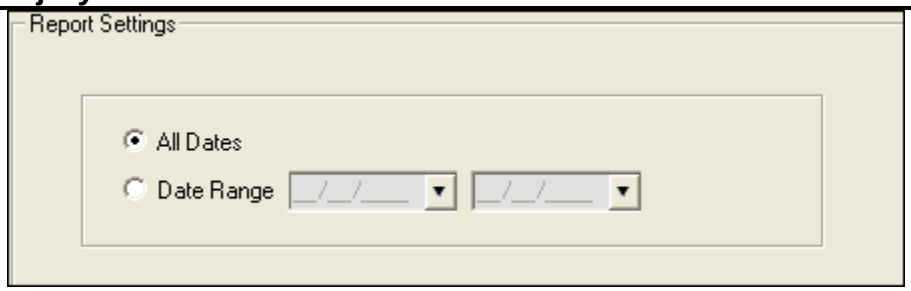
- When the **Print** window opens, click the **Print** button.

Injury/Illness by Date

This report identifies the total number of injuries, illnesses and preventions that occurred on a defined date.

To generate an Injury/Illness by Date report, complete the following steps:

1. On the Injury/Illness Report window, click the **Injury/Illness by Date** option to open the **Report Settings**.



2. Click one of the following options to identify the dates to include in the report:

- **All Dates** - Includes all dates in the report.

3. **Date Range** - Includes the dates defined in the Date Range boxes. When you select this option, you must enter dates into the two boxes.
3. To preview and then print the report, click the **Preview** button. When the **Preview** window opens, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.

- When the **Print** window opens, click the **Print** button.

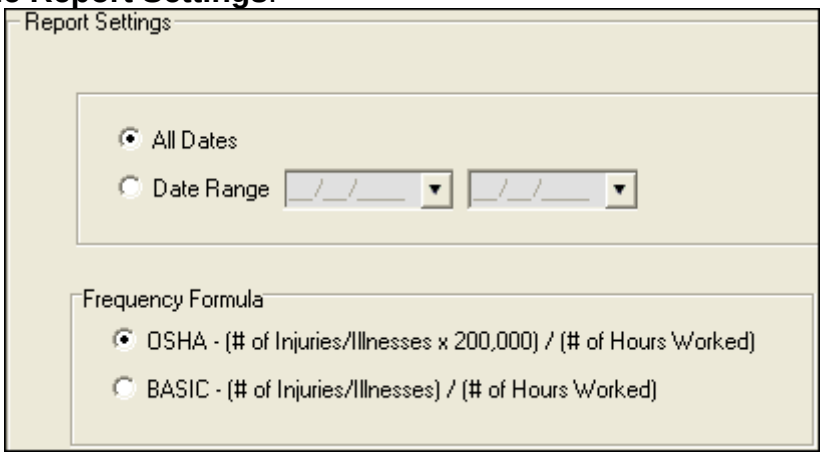
Injuries and Frequency

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.

The Injuries and Frequency report uses the statistics defined in the **Stats Base** to generate the data for this report.

To generate an Injuries and Frequency report, complete the following steps:

1. On the Injury/Illness Report window, click the **Injuries and Frequency** option to display the **Report Settings**.



2. Click one of the following options to identify the dates to include in the report:
- **All Dates** - Includes all dates in the report.
3. **Date Range** - Includes the dates defined in the Date Range boxes. When you select this option, you must enter dates into the two boxes.
3. Under **Frequency Formula**, click one of the following options to identify the formula to use in calculating the data for the report:
- **OSHA** (# injury/illnesses X 200,000) / (# of hours worked)
4. **BASIC** (# injury/illnesses) / (# of hours worked)
4. To preview and then print the report, click the **Preview** button. When the **Preview** window opens, click the **Print Report** button.

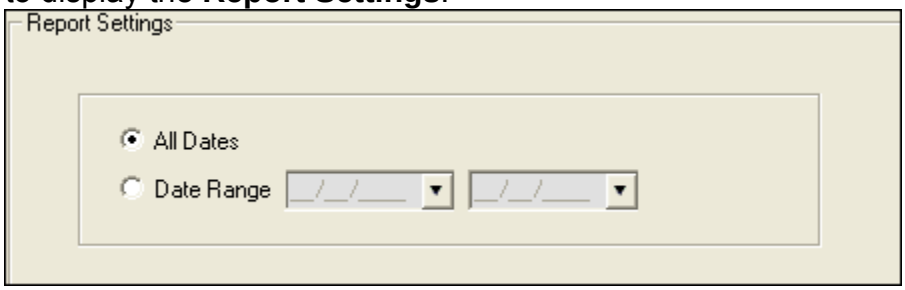
   To print the report without first previewing it, click the **Print** button.
- When the **Print** window displays, click the **Print** button.

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, complete the following steps:

1. On the Injury/Illness Report window, click the **Medical Unit Daily Summary** option to display the **Report Settings**.



2. Click one of the following options to identify the dates to include in the report:
- **All Dates** - Includes all dates in the report.
3. **Date Range** - Includes the dates defined in the Date Range boxes. When you select this option, you must enter dates into the two boxes.
3. To preview and then print the report, click the **Preview** button. When the **Preview** window opens, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
- When the **Print** window opens, click the **Print** button.

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 the Injury/Illness Types Report, complete the following steps:

1. On the Injury/Illness Reports window, click the **Injury/Illness Types** option.
4. To preview and then print the report, click the **Preview** button. When the **Preview** window opens, click the **Print Report** button.

   To print the report without first previewing it, click the **Print** button.
5. When the **Print** window opens, click the **Print** button.

Injury/Illness Revision History

Revision Date	Revision Summary
2010-04-27	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised instructions for the 9.01.00 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Added information for new Injury/Illness module.

I-Suite Report Descriptions

This section contains an overview of all of the reports available in the I-Suite system.

See "Time Report Descriptions"
See "Cost Report Descriptions"
See "Plans Report Descriptions"
See "Demob Report Descriptions"
See "Supply Report Descriptions"
See "Injury/Illness Report Descriptions"

Time Report Descriptions

The following Time Reports are available in I-Suite:

Work/Rest Ratio

The **Work/Rest Ratio** report identifies the ratio between work and rest for a resource at the incident. You can print the report for **All Personnel** or print it for a **Specific Person**

or a **Specific Request Number**. You can sort the information in the report by **Request Number**, **Person**, or **Total**. The information in this report includes:

- the request number,
2. the person's name,
3. the kind code assigned to the resource,
4. the activity date,
5. the total number of days and hours,
6. and the calculated work/rest ratio.

Summary of Hours for Personnel

The **Summary of Hours for Personnel** contains a summary of the hours worked for **All Personnel** or a **Specific Individual**. The information in this report includes:

- the person's name,
- the kind code or position assigned to the person,
- the hours the person worked on the incident,
- and any commissary deductions.

Payment Summary of Equipment Usage

The **Payment Summary of Equipment Usage** report identifies the total amount that was paid for the use of a specific equipment resource. The information in this report includes:

- the kind description for the equipment,
- the unique name assigned to the equipment,
- the amount posted for the equipment,
- any adjustment amounts posted for the equipment,
- and the net amount paid for the equipment.

Shifts in Excess of Standard Hours

The **Shifts in Excess of Standard Hours** report identifies the work shifts that went over the standard hours. You can print the report for **All Personnel** or print it for a **Specific Person** or a **Specific Request Number**. You can sort the information in the report by **Request Number**, **Person**, or **Total**. The information in this report includes:

- the request number,

- the person's name,
- the date when the excess hours occurred,
- the total hours for postings on that date,
- and the total number of hours that were in excess of the standard

OF-288 - Emergency Fire Fighter Time Report

The **OF-288** is the standard timekeeping record and payment document for federal and casual (AD) personnel involved in the fire fighting incident. You can print the report for **All Personnel**, a **Specific Crew**, a **Specific Person**, or a **Specific Request Number**. You can select to print or preview a:

- DRAFT Invoice,
- ORIGINAL Invoice,
- or DUPLICATE ORIGINAL Invoice.

OF-286 - Emergency Equipment Use Invoice

The **OF-286** is the standard invoice for emergency equipment used at an incident. You can print the invoice by **Request Number** or by **Name**. You have the option to print the **OF-286 Only**, the **OF286 with Itemized Deductions**, or **Itemized Deductions Only**. You can select to print or preview a:

- DRAFT Invoice,
- ORIGINAL Invoice,
- or DUPLICATE ORIGINAL Invoice.

Contractor Debits

The **Contractor Debits** report identifies debit amounts for a selected contractor. The information in this report includes:

- the contractor name,
- the incident or project name,
- the kind code assigned to the contracted resource,
- the unique identification code for the contracted resource,
- the activity date when the adjustment occurred,
- a description of the adjustment,
- the amount of each adjustment,
- the total adjustment amount for the resource,

- and the total adjustment amount for the contractor.

Emergency FireFighter Commissary Authorization

The **Emergency FireFighter Commissary Authorization** form is a 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.

Equipment Management Report

The **Equipment Management** report identifies the equipment being used at the incident. The information in this report includes:

- the kind code assigned to the equipment,
- a description of the kind code assigned to the equipment,
- the unique identification code assigned to the equipment,
- the equipment's request number,
- the hire date for the equipment,
- the hire time for the equipment,
- and the total number of equipment resources assigned the same kind code.

Crew Roster

The **Crew Roster** contains a list of all members assigned to the crew selected on the **Select Report** window. The information in this report includes:

- the names of the crew members,
- the status codes assigned to the crew members,
- the employment types for the crew members,
- and the kind codes assigned to the crew members.

Commissary Charges by Date

The **Commissary Charges by Date** report identifies resources that have made charges to the Commissary. The information in this report includes:

- the amount of the charge,
- the request number for the person to whom the charge was applied,

- the name of the person to whom the charge was applied,
- and the total amount of charges for the identified date.

Personnel Time Report

The **Personnel Time 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)

The information in this report includes:

- the name of the person for whom time was posted,
- the date when time was posted,
- the accounting code to which time was posted,
- the start and stop time that was posted,
- the total hours posted,
- and any premium amounts that were posted.

Missing Days of Postings

The **Missing Days of Postings** report identifies those resources with missing posted time. You can include:

- Only Contract resources with missing time
- Only Non-Contract resources with missing time

No Postings After

The **No Postings After** report lists those resources with no time posted after a specified date. You can include:

- All resources without time posted after the defined date
- Only Contract resources without time posted after the defined date
- Only Non-Contract resources without time posted after the defined date

Cost Report Descriptions

The following **Cost Reports** are available in I-Suite:

Sort Categories Cost Reports

On the **Cost** tab, click the **Sort Categories** option under **Report Categories** on the **Select Reports** window. When you select this option you can print the following Cost Reports:

The information in the reports are separated into sections based on the option you select in the box that displays under **Report Categories**. The following options are available:

- **Accounting**
- **Agency**
- **Payment Agency**
- **Division**
- **Home Unit**
- **Incident**
- **Accrual**
- **Section**

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.

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.

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.

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**.

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**.

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**.

Category Total
This report identifies cost totals based on the **Category**.

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**.

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.

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**.

Other Categories

On the **Cost** tab, click the **Other Categories** option under **Report Categories** on the **Select Reports** window. When you select this option you can print the following Cost Reports:

Analysis - Resource Cost
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.

Analysis - 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.

Analysis - Exception
This report identifies resources with actual time posted that also have three or more days of unposted time.

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.

Cumulative Air Costs
This report identifies the air costs based on those resources that were assigned Air kind codes (i.e. AT).

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**.

Resource Kind by Cost

This report identifies cost information based on kind and resource codes. The information in this report includes:

- the kind code and requirement number for the resource,
- the name of the resource,
- the agency code for the resource,
- the unit cost,
- the rate type,
- the rate units,
- the local,
- and the assign date.

Resource Kind by Cost O/H Personnel

This report identifies cost information based on overhead personnel resources. The information in this report includes:

- the kind code and requirement number for the resource,
- the name of the personnel resource,
- the agency code for the resource,

- the unit cost,
- the rate type,
- the rate units,
- the local,
- and the assign date.

Underutilized 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.

Underutilized 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.

Underutilized 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.

Underutilized 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**.

Underutilized 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**.

Underutilized 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**.

Underutilized Category Total
This report identifies cost totals based on the **Underutilized Category**.

Underutilized 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.

Underutilized 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**.

Plans Report Descriptions

The following Plans Reports are available in I-Suite:

Aircraft Report

This report identifies the aircraft available for 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 was not demobed,
- filled aircraft assignments,
- or all aircraft resources.

Crew Report

This report identifies the crews available for 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 were not demobed,
- filled crew assignments,
- or all crew resources.

Equipment Report

This report identifies the equipment available for 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 was not demobed,
- filled equipment assignments,
- or all equipment resources.

Overhead Report

This report identifies the overhead personnel available for 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 was not demobed,
- filled overhead personnel assignments,
- or all overhead personnel resources.

209 Resource List

This report contains ICS-209 information for Block 29.

Qualifications Report

This report identifies the positions/kind codes defined in the I-Suite system and those resources that are assigned to the positions. The information in this report includes:

- the position and kind code,
- the request number assigned to the resource,
- the name of the resource assigned to the position,
- identification of trainee resources,
- the code for the agency assigned to the resource,
- the section assigned to the resource,
- and the demobilization date for the resource.

Section Report

This report identifies those resources assigned to different sections (i.e. Command Staff, Operations Section, etc.).

ST/TF Report

This report displays the Strike Team or Task Force and all the components within that Strike Team or Task Force. You can select one, multiple, or all Strike Teams and Task Forces.

Crew Roster

This report displays the Crew(s) and all the components within that Crew. You can select one, multiple, or all Crews.

Demob Report Descriptions

The following Demob Reports are available in I-Suite:

Demobilization Checkout Form

The Demobilization Checkout Form must be 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.

Demob Planning Report

This report identifies resources and their current status for the incident. You can print the report for:

- resources that are checked-in, pending, or in staging,
- demobed or reassigned resources,
- resources pending demob,
- resources that were not demobed,
- filled resource assignments,
- unfilled resource assignments,

- or all resources

Mob/Demob Report

This report identifies those resources that were demobilized. You can print this report by:

- Section,
- Resource/Kind,
- or Demobilization Date.

Qualifications Report

This report identifies the positions/kind codes defined in the I-Suite system and those resources that are assigned to the positions. The information in this report includes:

- the position and kind code,
- the request number assigned to the resource,
- the name of the resource assigned to the position,
- identification of trainee resources,
- the code for the agency assigned to the resource,
- the section assigned to the resource,
- and the demobilization date for the resource.

Section Report

This report identifies those resources assigned to different sections (i.e. Command Staff, Operations Section, etc.).

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:

- The Resource **Type** is **C**, **E**, **O** or **A**.
- The Resource contains a **Tentative Release Date**.
- The **Tentative Release Date** is within a specified date range.

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:

- The Resource **Type** is **C**, **E** or **O**.
- The Resource **Status** is **P** (Pending).
- The **Dispatch Notified** checkbox is not checked.

Air Travel Request

This is a form that people can use to request commercial air travel. A form only prints for those resources that meet the following requirements:

- 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.

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:

- 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).

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:

- The Resource **Status** is not **D** (Demobed).
- The Resource contains an **Actual Release Date** and **Time**.
- The **Dispatch Notified of Actual Release** checkbox is not checked.

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:

- The Resource **Status** is **P** (Pending).
- The Resource contains a **Tentative Release Date** and **Time**.
- The **Return Travel Method** for the Resource is **A/R** or **Air**.
- The **Is Ground Support transportation needed?** checkbox contains a check.

Supply Report Descriptions

The following Supply Reports are available in I-Suite:

Supply History

This report is a history of supplies that have been issued. You can print this report for a specific Resource, Location or Item or you can print it for all Resources, Locations or Items.

Current Inventory

This report is a listing of all of the items currently at the incident. Information about the following items is included in the report:

- Received Items
- Issued Items
- Released Items
- Returned Items
- Items Transferred at the Incident

The report identifies the count for each listed item. Trackable items with property numbers are listed with their assigned property number and item amount currently in the Supply tent. A **Count Summary** is included at the end of each NFES group where property numbers are assigned. Each property number has a count associated with it (1 or 0 depending on whether it is still in Supply or was issued or released). For example, if you have a count of 35 for NFES # 000343 and 12 were issued, the summary would be 23. A **Total** displays at the end of the report. This is a total count for all of the items currently in Supply.

Adjustment History

This report contains a history of all Inventory Adjustments by NFES#. Each time a manual inventory is completed and adjustments made to the Supply System, a record is created that is included in the report. The report does not include active inventory information. It only contains a history of adjustments made during an inventory cycle. The information in the report includes:

- NFES #
- Property #
- Date of Adjustment
- Time of Adjustment
- Amount of Adjustment

Inventory - Manual Count

This report is necessary for completing an Inventory Manual Count Cycle. The report contains a list of the current inventory and inventory amounts. The report includes sections where you can write down the correct inventory if the actual inventory is different from what is defined in the Supply system. You can then use the report with the Inventory Form to make the necessary adjustments to the Supply Inventory system. Any changes made to the report are recorded and included in the Adjustment History report. The data you record in this report should be the actual count of the current inventory in stock as compared to the inventory defined in the Supply system.

Injury/Illness Report Descriptions

The following Injury/Illness reports are available in I-Suite:

Injury/Illness by Type

This report identifies the total number of injuries, illnesses and preventions currently defined in I-Suite. The information is broken down by injury/illness type for each date.

Injury/Illness/Prevention

This report includes detailed information about injury, illness or prevention records.

The **Injury/Illness/Prevention** report does not include resource names. It only identifies

the injury,illness or prevention information.

This report includes the following information:

- Event Date/Time
- Date Seen
- Section Assignment
- Remarks
- Event Category
- Activity at Time of Injury
- Event Type
- Incident Type
- Sub-Assignment
- Restricted/Lost Time
- Location at Incident
- Management Level
- Division/Group
- Incident Number
- Incident Phase
- Incident Name
- Treatment Offsite

Injury/Illness by Date

This report identifies the total number of injuries, illnesses and preventions that occurred on a defined date.

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.

The **Injuries and Frequency** report uses the statistics defined in the Stats Base to generate the data for this report.

Depending on the option selected on the Injury/Illness Reports window, the Frequency formula is based on either OSHA (# injury/illnesses X 200,000) / (# of hours worked) or BASIC (# injury/illnesses) / (# of hours worked)

The information in this report includes:

- Seen Date
- Total Personnel
- Hours Per Person/Per Day
- Hours Worked
- Cumulative Hours Worked
- Injuries by Date
- Injury Frequency by Date
- Cumulative Injuries
- Injury Frequency Cumulative
- Lost Time for Injuries by Date
- Lost Time for Injuries Frequency by Date
- Cumulative Lost Time for Injuries
- Lost Time for Injuries Frequency Cumulative

Medical Unit Daily Summary

This report identifies injury and illness issues that were reported to the Medical Unit at an incident for each defined date.

The information in this report includes:

- Incident where Injury/Illness/Prevention Occurred
- Date Seen
- Resource Position
- Unit/Crew
- Government or Non-Government
- Nature of Injury/Illness
- Remarks

Injury/Illness Types

This report identifies injury and illness types medical or safety officers can select from the **Injury/Illness Type** drop-down list. The information in this report includes:

- Injury/Illness Type
- Abbreviated Type
- Nature Code

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