Incident Time System User's Guide

The Incident Time System (ITS) is part of the I-Suite group of software programs. ITS allows you to collect and track incident time for Federal, Casual (AD), and other personnel, and for Emergency Contracted Resourses. ITS allows you to create pay documents, the Fire Time Report (OF-288) and the Equipment Use Invoice (OF-286). By collecting accurate time data, you can generate meaningful management reports.

Topics in this guide include the following:

- About this guide
- Getting Started
- Working with incident information
- Working with personnel information
- Working with crews and members/operators
- Working with contractor and agreement data
- Working with commissary debits and additions
- Working with reports
- Performing searches for personnel or equipment
- Putting it all together.

For information about installing ITS, please refer to the "I-Suite Administrator's Guide," which is available for download on http://isuite.nwcg.gov.

About this guide

This Incident Time System User's Guide is organized into sections, based on the types of tasks you will commonly perform. At the beginning of each section you will find an overview of the topics explained. Where appropriate, diagrams are shown immediately following each task. Topics in this section include:

- Before you begin
- Conventions.

Before you begin

Before using ITS, you must be feel confident that:

- You are familiar with your personal computer and function keys and understand personal computer concepts.
- You are familiar with Windows 2000, Windows XP, or Windows NT and can log on and log off.

Incident Time System User’s Guide

Conventions

The following conventions are used within this guide:

- Button names, option labels, screen names, tab names, and text box names appear in bold, in the same case as on your keyboard or screen. For example, the fist step in a procedure might instruct you to

  1 On the **Incident Data** menu, click the **Incident #** drop-down arrow, and then click to select the **Incident** of your choice.

- Topics of special interest or hints that will help you perform a specific task show a line before and after the text. The text appears in italic type. For example, the following note appears in the “Working with incident information” section

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*While working in the **Manage All Incidents as One** mode, you must select an incident for posting each resource’s time.*

Getting Started

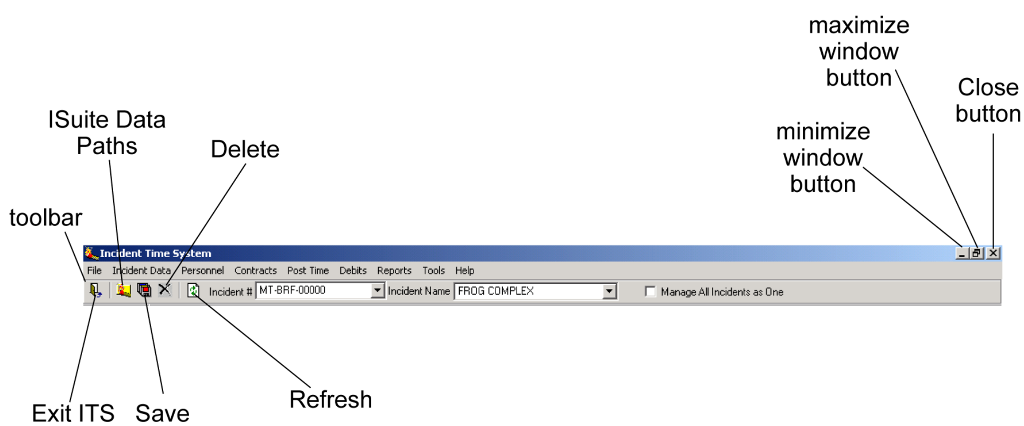
This section explains the basic concepts and information you need to begin using ITS. Topics in this section include:

- Terms and concepts
- Security
- Logging on and logging off
- Getting help
- Understanding the stand-alone and integrated environments.

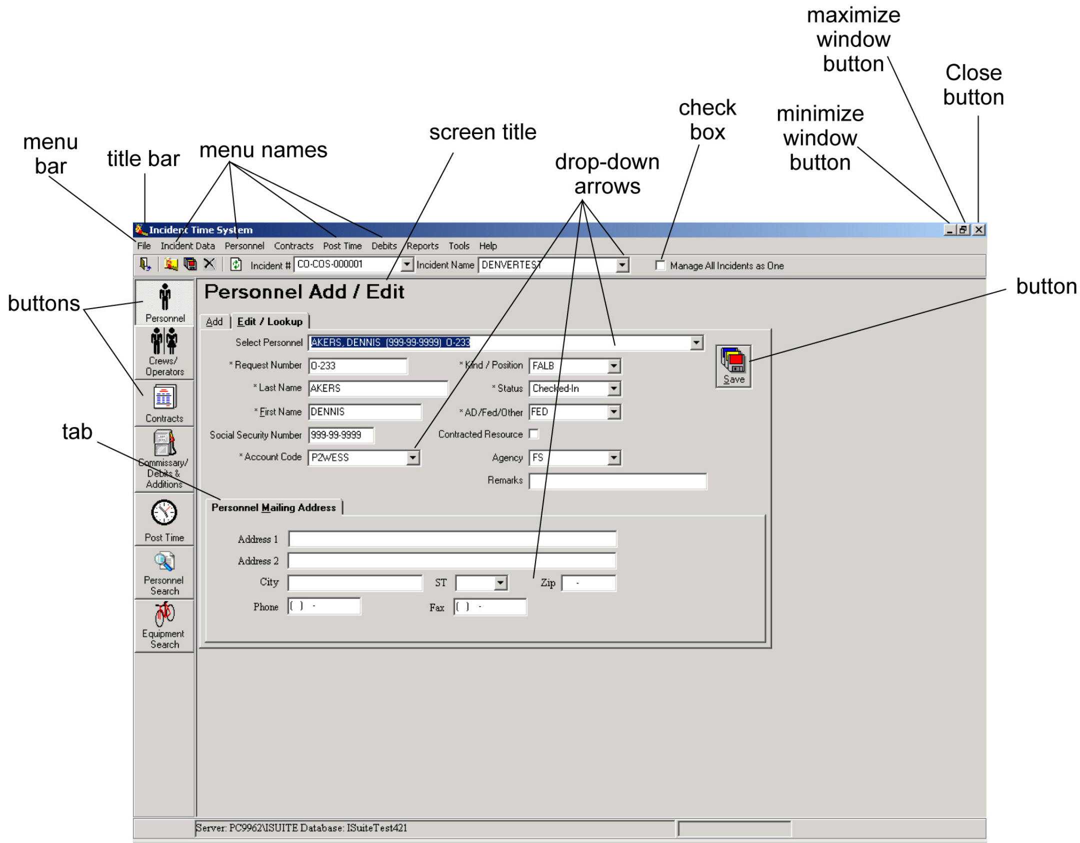
Terms and concepts

This section outlines some of the screens, toolbars, and menus that you will be using in ITS. If you aren’t already familiar with ITS or have forgotten a few things since training, review these terms and concepts before proceeding with the remaining sections in this guide.

The following diagram shows the ITS toolbar and a brief explanation of the toolbar buttons.



The following diagram shows the top portion of the ITS application and a brief explanation of the screen elements and terminology used throughout this guide.



Security

Be prudent when working with private information such as Social Security Numbers (SSNs) and IRS Federal Employer Tax ID Numbers (EINs).This information is to be kept confidential.

Your CTSP manages the ITS password, who can change it using the AdminTool that is shipped with the I-Suite software. Only under special circumstances, such as operating in a stand-alone environment, would you ever need to change your ITS password.

For more information about clearing out SSNs and EINs, see "Clearing out Social Security Numbers," in the "I-Suite Administrator's Guide. For more information about changing the ITS password, see "Managing security" in the "I-Suite Administrator's Guide," or contact your CTSP.

Logging on and logging off

This section explains how to log on and log off of ITS.

To log on to ITS

1 From your **Desktop**, double-click the **ITS** icon or click **Programs** from the **Start** menu, point to **I-Suite**, and then click **ITS**.

If you have trouble logging on to ITS, please refer to the “Handling installation problems,” in the “I-Suite Administrator’s Guide,” which is available for download on http://isuite@nwcg.gov.

To log off ITS

- On the **ITS menubar**, click **Exit ITS**, or click **Exit** on the **File** menu.

Getting help

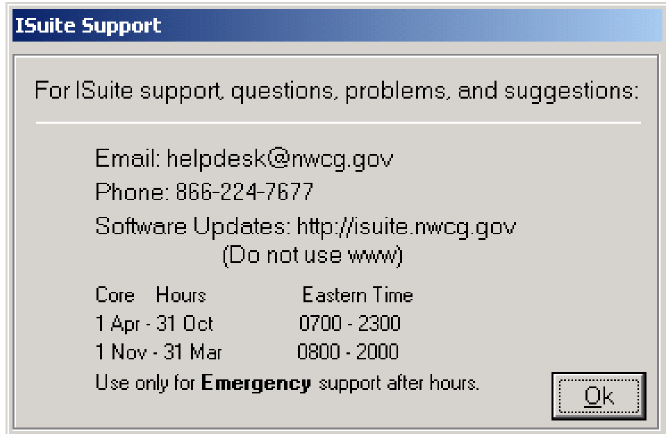
This section explains how to access and locate help information. There are three basic ways to obtain help information for ITS:

- **Access the I-Suite website.** This site contains a wide array of I-Suite information, including software downloads, updates, and user documentation.
- **Contact the I-Suite Helpdesk.** If you are unable to answer your question using the I-Suite website, contact the I-Suite Helpdesk at (866) 224-7677.
- **Review this Incident Time System User’s Guide**. This guide is available in Acrobat format. To locate topics of interest, click to select the **Bookmark** of your choice. Bookmarks are listed along the left-hand side of the Acrobat document. When you click the **Bookmark**, you will advance to that topic within the document.

To display help information within ITS

- On the **ITS** menu bar, click **Help**, and then click **Support**.

The following diagram shows the ISuite Support dialog box.



To locate help information on the I-Suite website

1 Start your Internet browser.

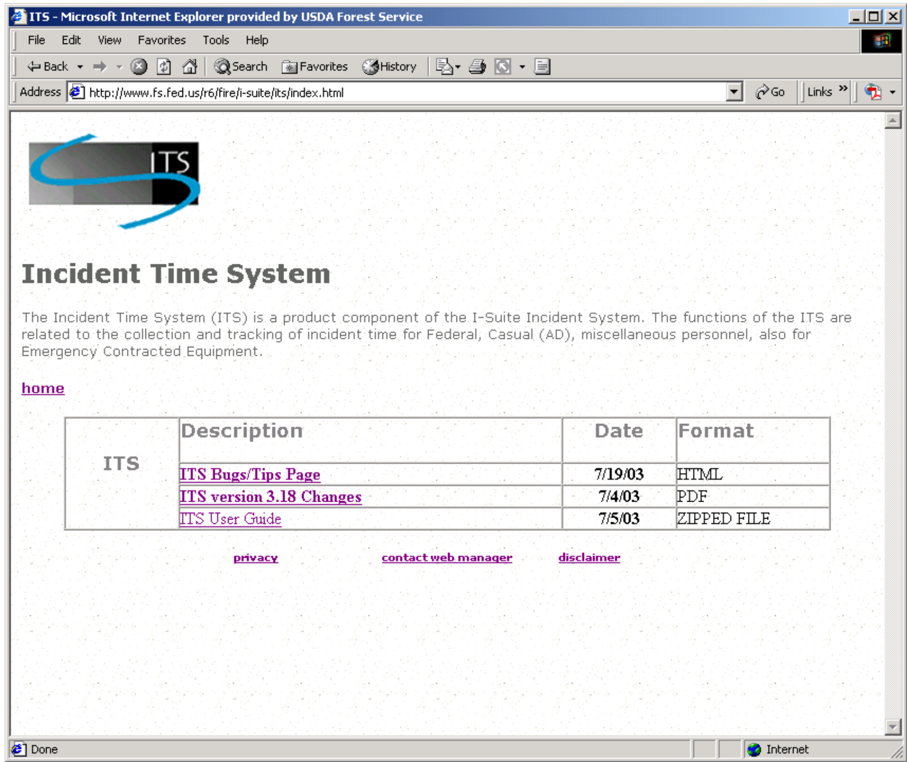
2 In the **Address** box, type **http://isuite.nwcg.gov**, and then press ENTER.

3 On the **Welcome to I-Suite** webpage, click the **ITS** application icon.

4 On the **ITS webpage**, click to select the **topic** of your choice.

The following diagram shows the ITS application icon on the Welcome to I-Suite webpage.

The following diagram shows the ITS webpage and a list of available topics.



To contact the I-Suite Helpdesk

The I-Suite Helpdesk is available 24-hours per day, seven days per week.

- Call **(866) 224-7677**, or email **helpdesk@dms.nwcg.gov**.

To obtain a copy of this Incident Time System User's Guide

1 Start your Internet browser.

2 In the **Address** box, type **http://isuite.nwcg.gov**, and then press ENTER.

3 On the **Welcome to I-Suite** webpage, click the **ITS** application icon.

4 On the **ITS webpage**, click to select **ITS User's Guide**.

5 In **Acrobat Reader**, save the file to your personal computer in a folder location of your choice.

Understanding the stand-alone and integrated environments

This section explains the difference between working in the stand-alone environment or the integrated environment. While you may only be using ITS for your work, it is important to understand how the information you enter in ITS affects other I-Suite programs in the integrated environment.

Typically, you will be working in the integrated environment.

- **Integrated environment**. Data ownership is shared between the Resource Planning and Finance groups. Resources, crews, and operators are already entered in IRSS. Maintaining data standards is critical.
- **Stand-alone environment**. All data is entered and managed by ITS users for timekeeping and making payments.

Since data is shared between IRSS, ICARS, and ITS, any changes you make within ITS affects the data within ICARS and IRSS.

Remember, what works for one incident may not work well for another!

Working with incident information

This section explains how to enter and edit incident information. Topics in this section include:

- Managing incident data
- Managing accounting codes.

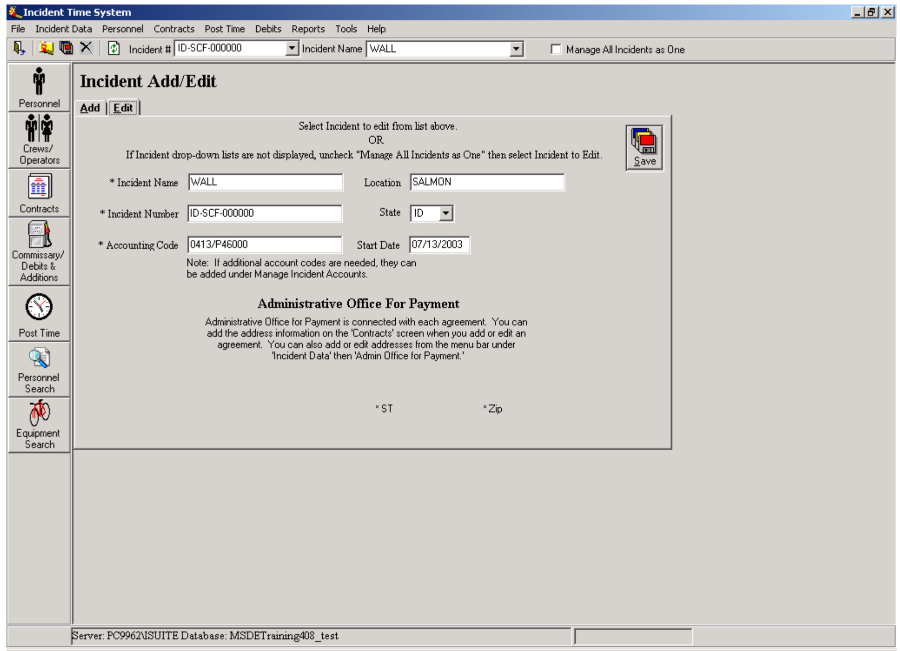
Managing incident data

This section explains how to review, edit, and add incident data and how to list all resources together and manage all incidents as one.

To review and edit incident data

1. On the **Incident Data** menu, click **Incident Add/Edit**.
2. Click the **Incident #** drop-down arrow, click to select the **Incident** of your choice, and then click the **Edit** tab.
3. Modify the following information as appropriate
    - Incident Name
    - Incident Number
    - Accounting Code
    - Location
    - State
    - Start Date.
4. To save your changes, click the **Save** button.

The following diagram shows the Edit tab on the Incident Add/Edit screen.



To create a new incident

Be sure to follow the appropriate data standards!

1 On the **Incident Data** menu, click **Incident Add/Edit**.

2 Click the **Add** tab.

3 In the **Incident Name** box, type the **Incident Name**.

4 In the **Incident Number** box, type the **Incident Number**, in the format [HOST ID] - 99999.

5 In the **Accounting Code** box, type the **Accounting Code** number.

6 In the **Location** box, type the **Location** name.

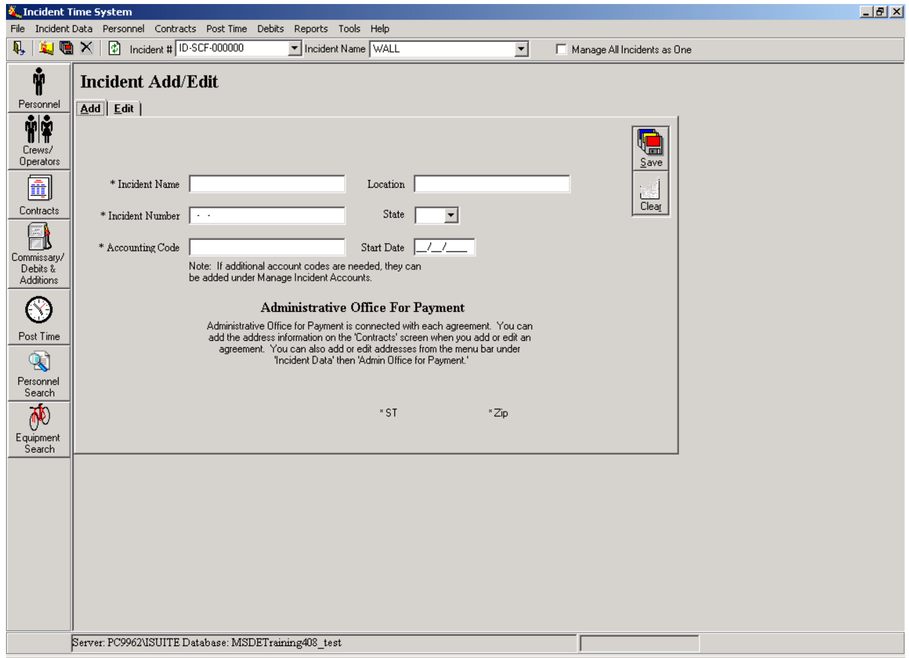
7 Click the **State** drop-down arrow, and then click to select the **State** where the incident is located.

8 In the **Start Date** box, type the incident **Start Date**, in the format MMDDYYYY.

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

To clear your entries before saving the new incident, click the ***Clear*** *button.*

The following diagram shows the Add tab on the Incident Add/Edit screen.



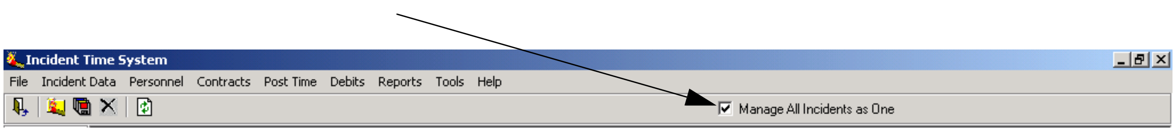
To manage all incidents as one

The Manage All Incidents as One check box allows you to display all resources together on a single list. While these resources must be reporting to the same ICP, they may not be from the same incident.

When working in this mode, you must select an incident to post each resource's time.

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

The following diagram shows the location of the Manage All Incidents as One check box.



Managing accounting codes

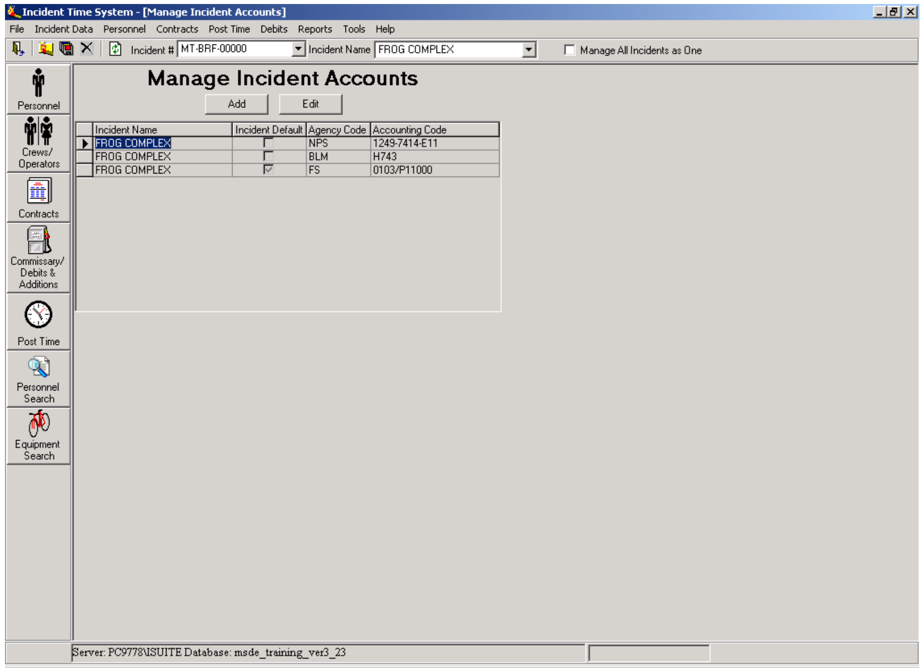
This section explains how to review, edit, and assign accounting codes to an incident and to resources.

To review an accounting code for an incident

1 On the **Incident Data** menu, click **Incident Accounts**.

2 Click the **Incident #** drop-down arrow, and then click to select the **Incident** of your choice.

The following diagram shows the Manage Incident Accounts screen.



To edit an accounting code

1 On the **Incident Data** menu, click **Incident Accounts**.

2 Click the **Incident #** drop-down arrow, and then click to select the **Incident** of your choice.

3 On the **Manage Incident Accounts** screen, click the **Edit** button.

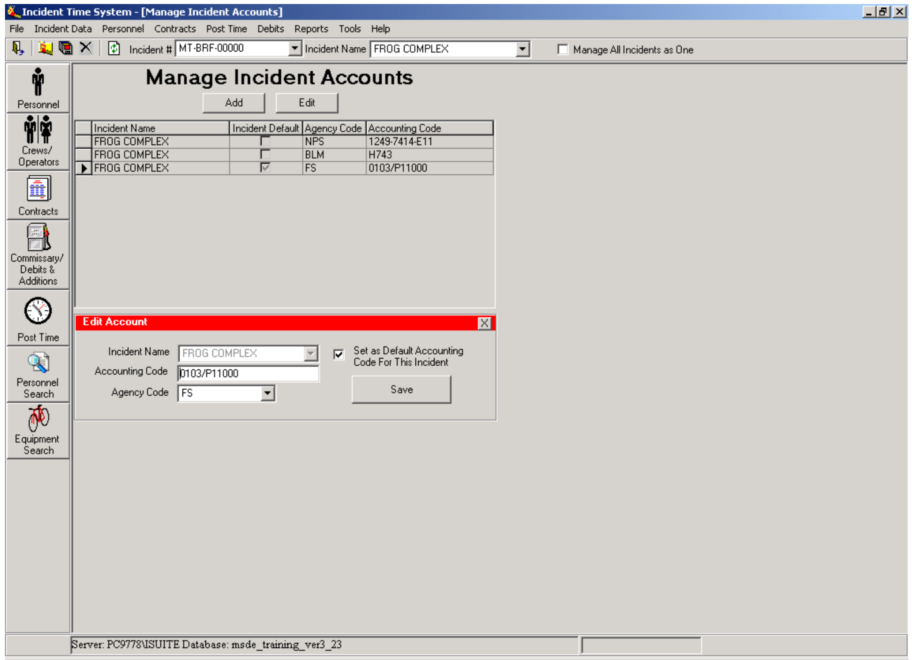
4 On the **Edit Account** dialog box, modify the following information as appropriate

- Accounting Code
- Agency Code.

5 To set this **Accounting Code** as the default, click to select the **Set as Default Accounting Code for This Incident** check box.

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

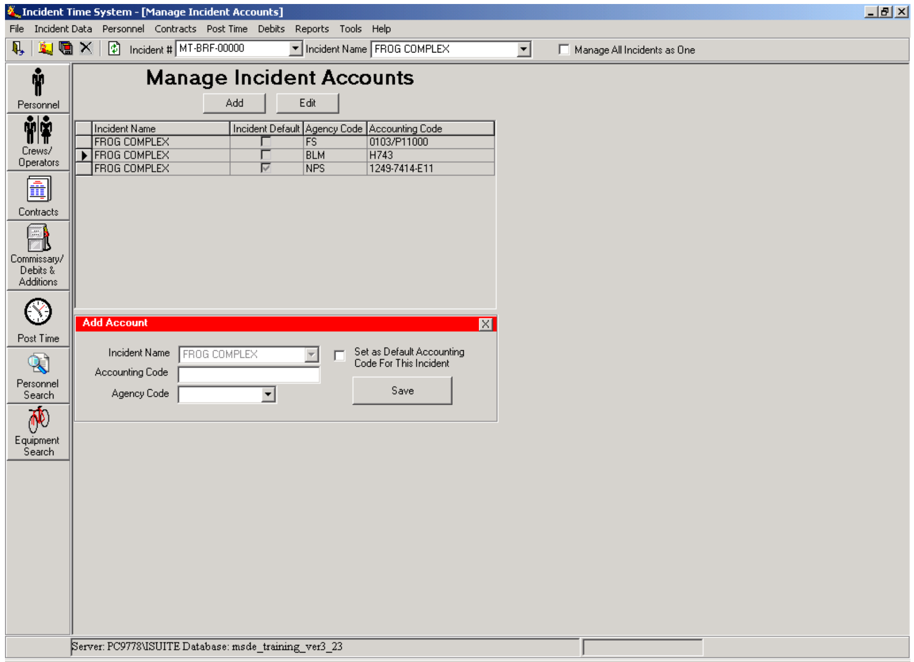
The following diagram shows the Edit Account dialog box on the Manage Incident Accounts screen.



To add multiple accounting codes to an incident

1. On the **Incident Data** menu, click **Incident Accounts**.
2. On the **Manage Incident Accounts** screen, click the **Add** button.
3. On the **Add Account** dialog box, add the following information as appropriate
   - Accounting Code
   - Agency Code.
4. To set this **Accounting Code** as the default, click to select the **Set as Default Accounting Code for This Incident** check box.
5. To save your changes, click the **Save** button.

The following diagram shows the Add Account dialog box on the Manage Incident Accounts screen.

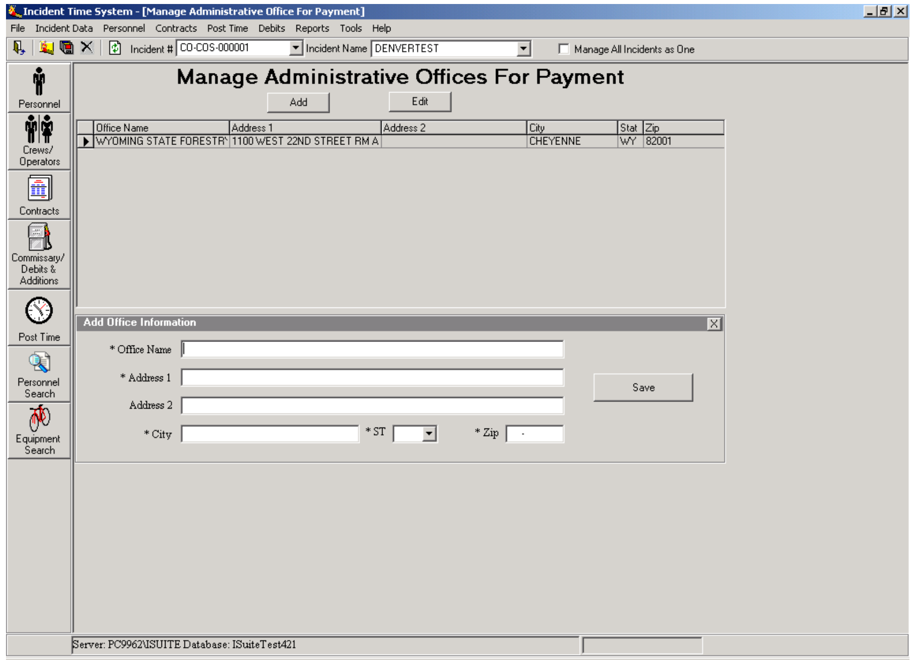


To identify the administrative office(s) for payment

Identify the administrative office during the initial startup for an incident.

1. On the **Incident Data** menu, click **Admin Office for Payment**.
2. Click the **Add** button.
3. On the **Add Office Information** dialog box, complete the following information
   - Office Name
   - Address 1
   - Address 2
   - City
   - ST
   - Zip.
4. When finished, click the **Save** button.

The following diagram shows the Add Office Information dialog box on the Manage Administrative Offices For Payment screen.



Working with personnel information

This section explains how to edit and add personnel information. Topics in this section include:

- Editing and adding personnel data
- Posting personnel time.

Editing and adding personnel data

Remember these key points when working with personnel data for posting time and tracking payments:

- In the integrated environment, you will edit personnel data entered by Check-In (IRSS) personnel.You share data ownership between Resource Planning and Finance groups.
- In the stand-alone environment, you must enter all personnel data. You do not share data ownership.
- By default, all Social Security Numbers that originate from IRSS are "999-99-9999." For AD employees, you must enter the exact SSN for that individual, or enter "999-99-9999" if the SSN is not currently available.

To edit personnel data - integrated environment

1. On the **Personnel Add/Edit** screen, click the **Edit/Lookup** tab.
2. Click the **Select Personnel** drop-down arrow, and then click to select the **Person** of your choice.

3 For AD personnel, type the person's **Social Security Number** in the **Social Security Number** box, in the format 123456789.

When completing the Social Security Number box, the cursor will automatically advance to the next field as you type.

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

5 Click the **AD/Fed/Other** drop-down arrow, and then click to select the the **Employment Code** of your choice

- AD - for casual Federal employees
- Fed - for Federal employees
- Other - for other types of employees, such as county and state.

6 To specify a contracted resource, click to select the **Contracted Resource** check box.

7 For **AD** personnel, complete the **Payment Information** tab as appropriate:

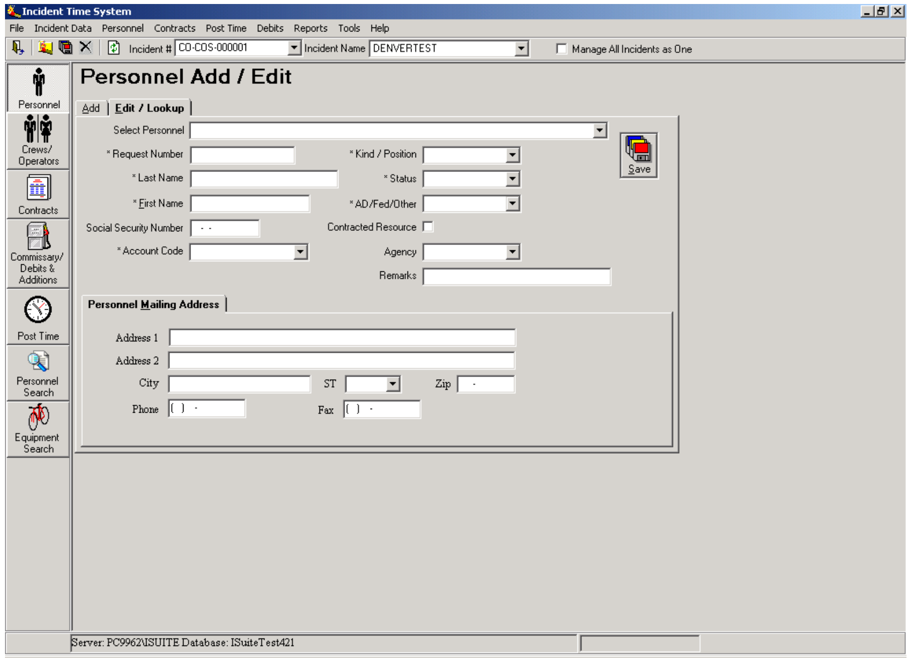
- Initial Employment
- Return Travel
- Point of Hire
- Area
- Class
- Current Rate.

8 On the **Personnel Mailing Address** tab, complete the following information as appropriate:

- Address 1
- Address2
- City
- ST
- Zip
- Phone
- Fax.

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

The following diagram shows the Edit/Lookup tab on the Personnel Add/Edit screen.



To add personnel data - stand-alone environment

1 On the **Personnel Add/Edit** screen, click the **Add** tab.

2 In the **Request Number** box, type the **Request Number** for that person, in the format X1234.

*Valid **Request Numbers** include:*
A - for Aircraft
C - for Crews
E - for Equipment
I - for Initial Attack
O - for Overhead
S - for Supplies.

3 In the **Last Name** box and **First Name** box, type the **First** and **Last Name** of the person.

4 For AD personnel, type the person’s **Social Security Number** in the **Social Security Number** box, in the format 999999999.

*For resources not requiring an SSN for payment, type **999999999**.*

When completing the Social Security Number box, the cursor will automatically advance to the next field as you type.

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

6 Click the **Kind/Position** drop-down arrow, and then click to select the **Kind/Position** of your choice.

7 Click the **Status** drop-down arrow, and then click to select the current **Status**.

8 Click the **AD/Fed/Other** drop-down arrow, and then click to select the the **Employment Code** of your choice

- AD - for temporary Federal employees
- Fed - for full-time Federal employees
- Other - for other types of employees, such as seasonal and state.

9 To specify a contracted resource, click to select the **Contracted Resource** check box.

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

11 In the **Remarks** box, type any appropriate **Remarks**.

12 On the **Payment Information** tab, complete the following information as appropriate:

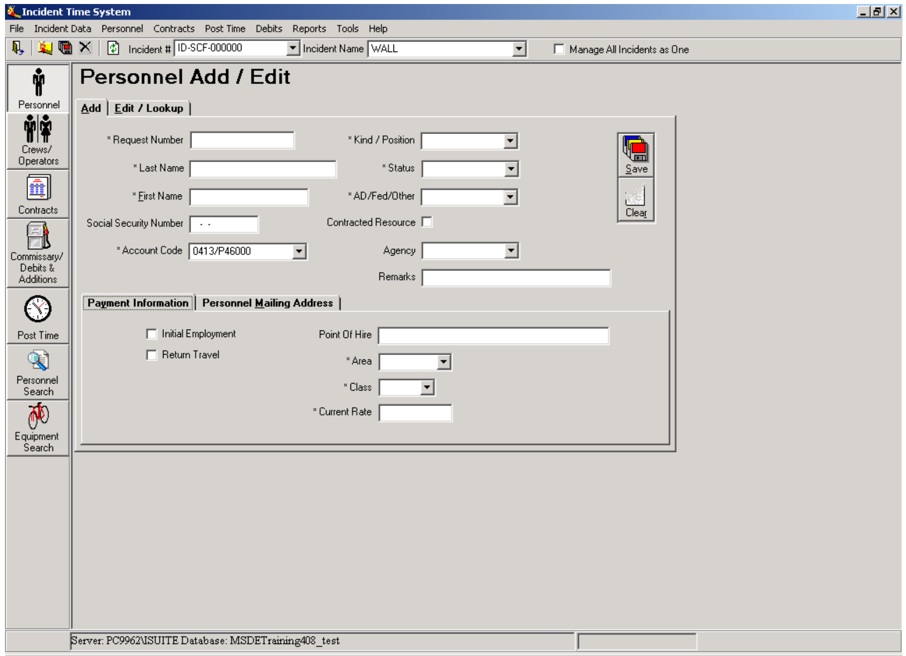
- Initial Employment
- Return Travel
- Point of Hire
- Area
- Class
- Current Rate.

13 Click the **Personnel Mailing Address** tab, and then complete the following information as appropriate:

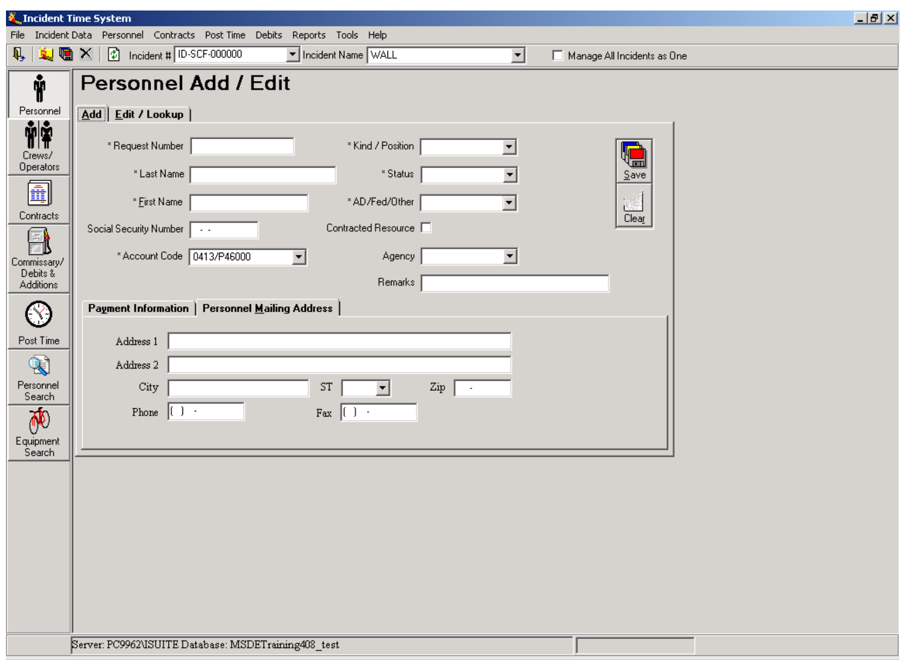
- Address 1
- Address2
- City
- ST
- Zip
- Phone
- Fax.

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

The following diagram shows Add tab on the Personnel Add/Edit screen.



The following diagram shows the Personnel Mailing Address tab on the Personnel Add/Edit screen.



Posting personnel time

This section explains how to post time for personnel. Remember these key points when posting personnel time:

- Posting time is performed the same, whether working in the stand-alone or integrated environments.
- You can edit the Stop and Start times, Special codes, and rates directly on the Personnel Post Detail.
- You can not edit the Date. To change the Date you must delete and then repost that entry.
- The Date automatically changes for posting that extends beyond midnight for any given shift.
- If you post overlapping hours, you must verify the hours before you can proceed.

To post personnel time

*Remember, you can click to select the **Use Enter Key as Tab for Posting** check box for faster, 10-key data entry!*

1 Click the **Post Time** button.

2 On the **Incident Post** screen on the **Personnel** tab, click the **Select Personnel** drop-down arrow, and then click to select the **Person** of your choice.

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

4 In the **Date** box, type the **Date**, in the format MMDDYYYY.

*When completing the **Date** box, the cursor will automatically advance to the next date field as you type.*

*To enter the current **Date**, type **=** (equal sign). To enter yesterday’s **Date**. type **-** (minus sign). To enter a Future **Date**, type + (plus sign).*

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

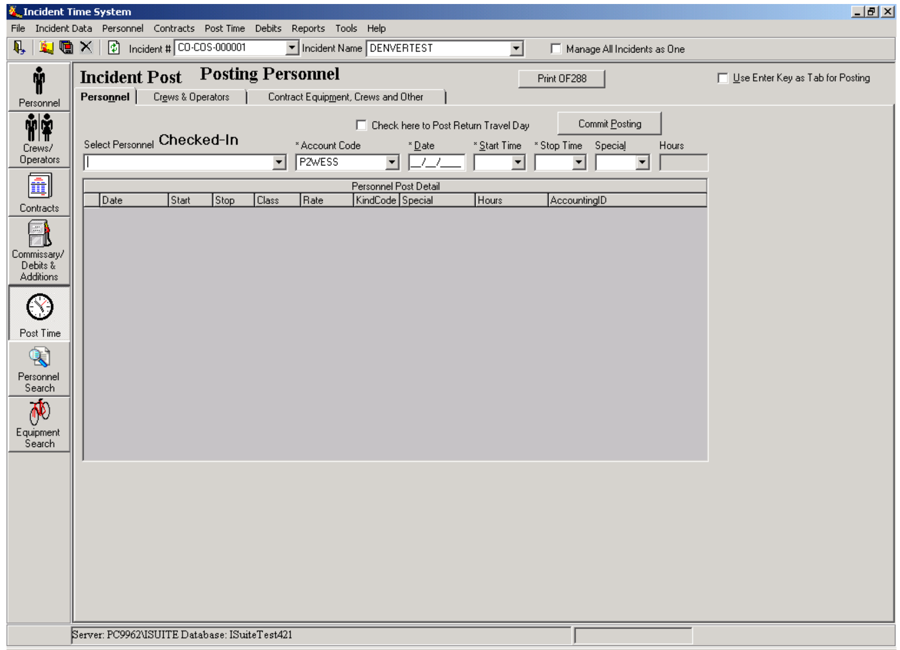
6 Click the **Stop Time** drop-down arrow, and then click to select the **Stop Time** of your choice.

7 Click the **Special** drop-down arrow, and then click to select the **Special** code of your choice.

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

*Clicking the **Commit Posting** button saves your data.*

The following diagram shows the Incident Post screen for posting personnel time.



To post time when managing all incidents as one

1 On the **ITS toolbar**, click to select the **Manage All Incidents as One** check box.

2 On the **Incident Post** screen on the **Personnel** tab, click the **Select Personnel** drip-down arrow, and then click to select the **Person** of your choice.

3 Click the **Account Code** drop-down arrow, and then click to select the **Incident/Acct Code** combination of your choice.

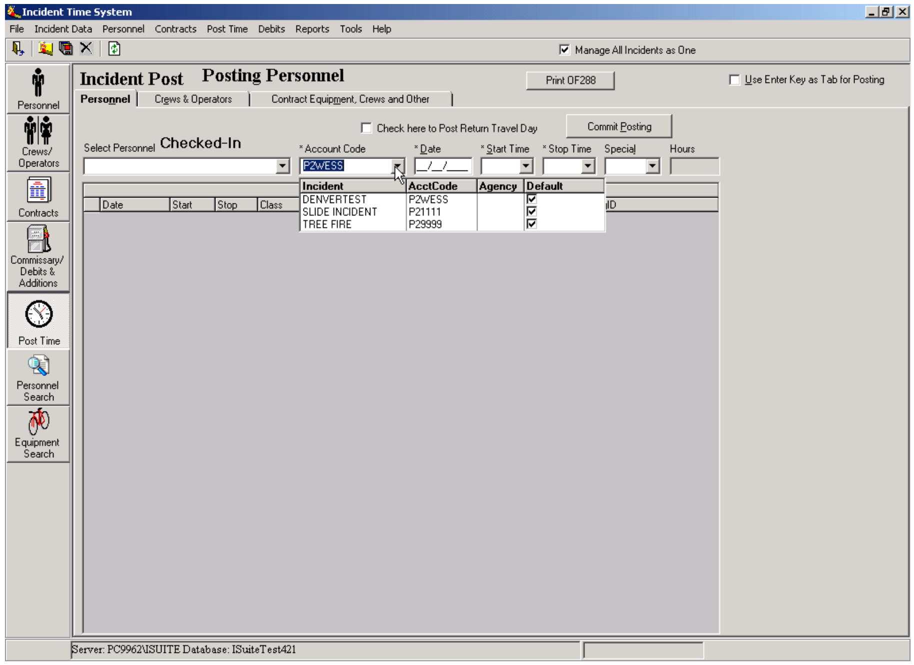
Be sure to select the correct person, incident, and account code.

4 Complete the remaining information as appropriate

- Date
- Start Time
- Stop Time
- Special.

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

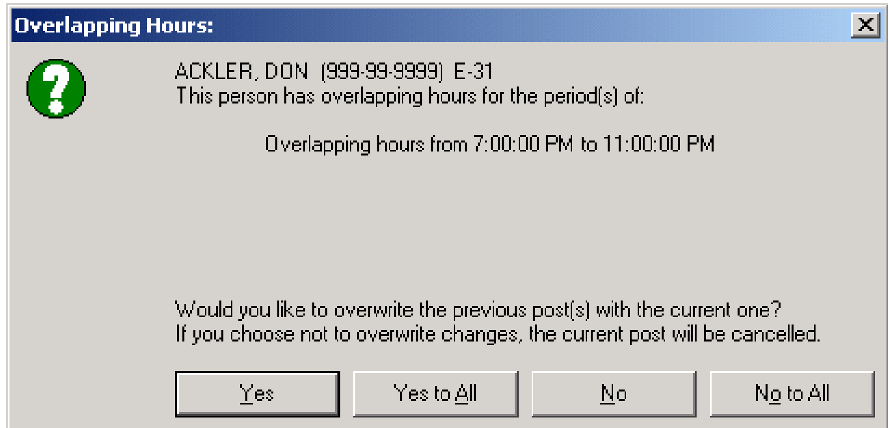
The following diagram shows the Incident Post screen when managing all incidents as one. In this example, the Account Code drop-down arrow lists three different incidents.



To repost a day of time with different hours

1. On the **Incident Post** screen on the **Personnel** tab, click the **Select Personnel** drop-down arrow, and then click to select the **Person** of your choice.
2. In the **Date** box, type the **Date** in the format MMDDYYYY.
3. Click the **Start Time** drop-down arrow, and then click to select the **Start Time** of your choice.
4. Click the **Stop Time** drop-down arrow, and then click to select the **Stop Time** of your choice.
5. Click the **Special** drop-down arrow, and then click to select the **Special** code of your choice.
6. To commit the posting, click the **Commit Posting** button.
7. On the **Overlapping Hours** dialog box, click **Yes** or click **Yes to All**.

The following diagram shows the Overlapping Hours dialog box.



To change the AD rate, Kind Code, and Special code - one-time change only

1 On the **Incident Post** screen on the **Personnel** tab, click the **Select Personnel** drop-down arrow, and then click to select the non-federal **Person** of your choice.

2 Locate the row containing the **Class** and **Rate** you want to change.

3 Click to select the **Class** box, and then type to replace the existing AD designation with the new AD designation.

For AD-5 rates, type the ***Rate*** *on the* ***ITS:AD-5*** *dialog box, in the format 99.99, and then click* ***OK****.*

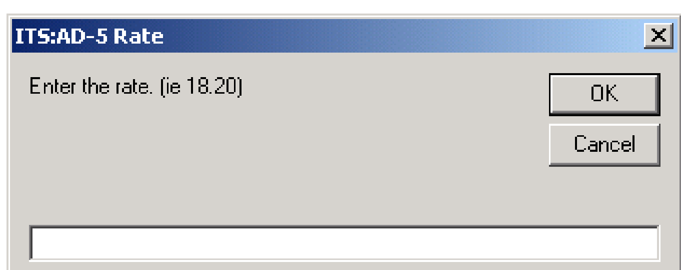
4 To change the **Kind Code**, click the **Kind Code** drop-down arrow, and then click to select the **Kind Code** of your choice.

5 Locate the row containing the **Special** code you want to change.

6 Click the **Special** drop-down arrow, and then click to select the **Special** code of your choice.

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

The following diagram shows the ITS:AD-5 dialog box for entering an AD-5 rate.



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To permanently change the AD rate and/or Kind Code for all future personnel postings - to change all subsequent postings

1. On the **Incident Post** screen on the **Personnel** tab, click the **Select Personnel** drop-down arrow, and then click to select the **Person** who has the AD rate you want to change.
2. On the **Payment Information** tab, click the **Class** drop-down arrow, click to select the **AD Rate** of your choice.
3. To change the **Kind Code**, click the **Kind Code** drop-down arrow, and then click to select the **Kind Code** of your choice.
4. When finished, makingclick the **Save** button.

To delete a row of time

1. On the **Incident Post** screen on the **Personnel** tab, click the **Select Personnel** drop-down arrow, and then click to select the **Person** of your choice.
2. Click in the cell for the row you want to delete, and then click the **Delete** button.

To post return travel time

*Posting end travel time sets the number of Hours to **0** (zero) and the Special code to **TVL**.*

1. On the **Incident Post** screen on the **Personnel** tab, click the **Select Personnel** drop-down arrow, and then click to select the **Person** of your choice.
2. Click to select the **Check here to Post Return Travel Day** check box.
3. In the **Date** box, type the **Date**, in the format MMDDYYYY.
4. Click the **Start Time** drop-down arrow, and then click to select the **Start Time** of your choice.
5. To commit the posting, click the **Commit Posting** button.

To view and/or print an OF-288

1. On the **Incident Post** screen, click the **Print OF288** button, or click **OF-288** on the **Reports** menu.
2. On the **OF-288** dialog box, perform one of the following
   - to view the OF-288 by request number, click the **Request Number** drop-down arrow, and then click to select the **Request Number** of your choice.
   - to view the OF-288 for a person, click the **Person** drop-down arrow, and then click to select the **Person** of your choice.

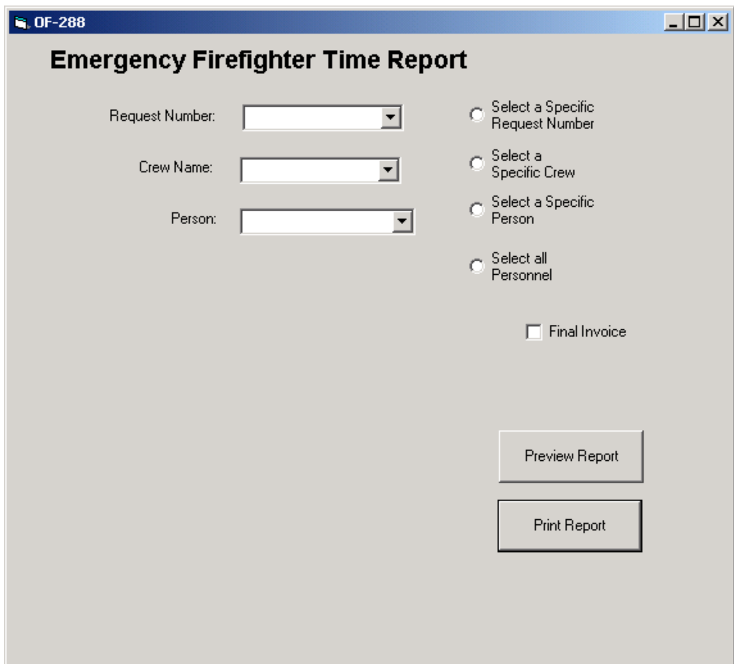
3 To view the final OF-288 for a resource leaving the incident, click to select the **Final Invoice** check box.

4 To preview the OF-288, click the **Preview Report** button.

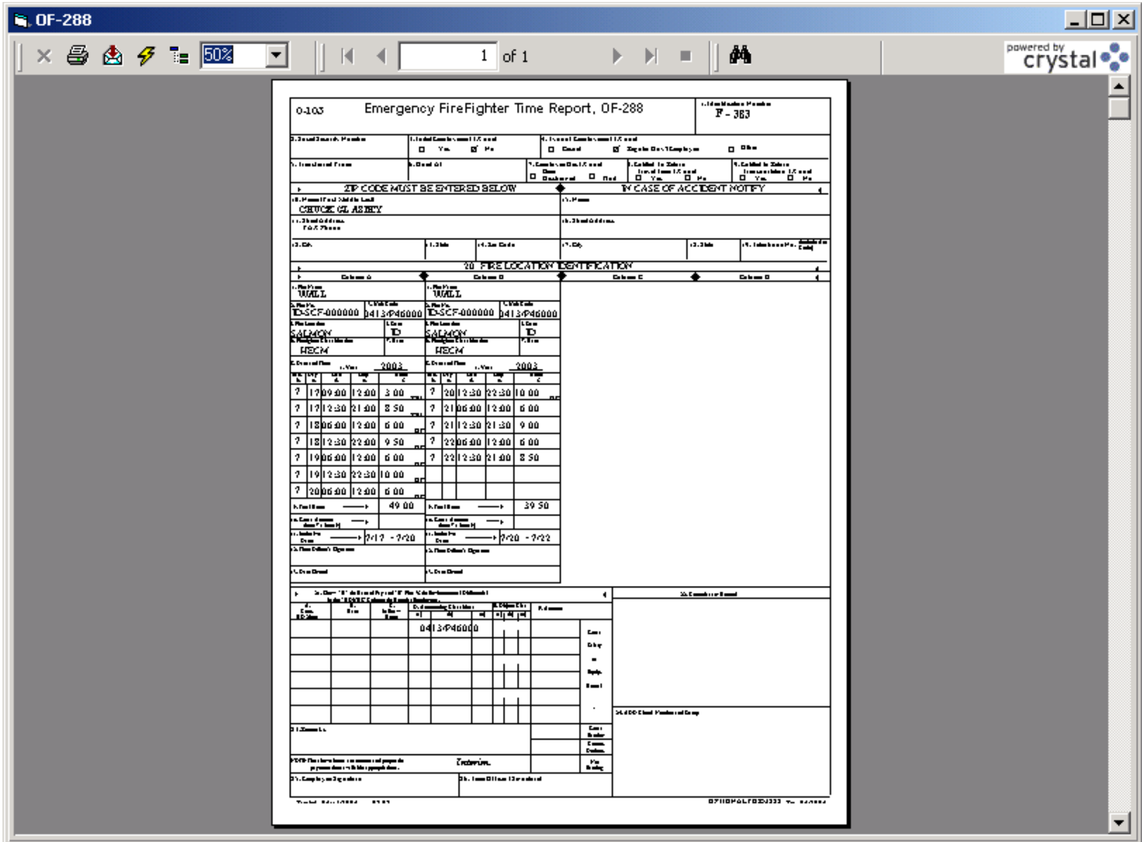
5 To print the OF-288, click the **Print Report** button.

If this is a partial payment and you want the resource's social security number to print on the OF-288, you must click to select the ***Final Invoice*** *check box.*

The following diagram shows the OF-288, "Emergency Firefighter Time Report" dialog box.



The following diagram shows a sample Emergency FireFighter Time Report OF-288 for an individual overhead resource, as it appears on your screen.



Working with crews and members/operators

This section explains how to view, add, edit, and print crews and crew members/operators, and how to demobilize (demob) a crew and/or crew members/operators. Topics in this section include:

- Understanding crews
- Creating and editing crews
- Posting time for crews and crew members/operators
- Reviewing an OF-288 for crews.

Understanding crews

Remember these key points when working with crews and members/operators:

- In ITS, a crew is more than one resource sharing the same request number. A crew may be a hand crew, engine crew members, or a contract pickup with an AD driver.
- There are two levels of crew information:
    - At the crew level, you can add and/or edit information about the crew.
    - At the member/operater level, you can add and/or edit information

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about the individual crew members/operators on a crew.

- You can build a crew by attaching or rostering members to a resource
  - In the integrated environment, IRSS populates ITS with shared data. If members are being rostered in IRSS, then you will primarily need to edit members. If members are not being rostered in IRSS, then you must add members to a crew or to a piece of equipment.
  - In the stand-alone environment, you will manage all data, including adding and then rostering members/operators to a crew.

To view and print a crew manifest

1 Click the **Crews/Operators** button.

2 On the **Crew/Operator Roster** screen, perform one of the following

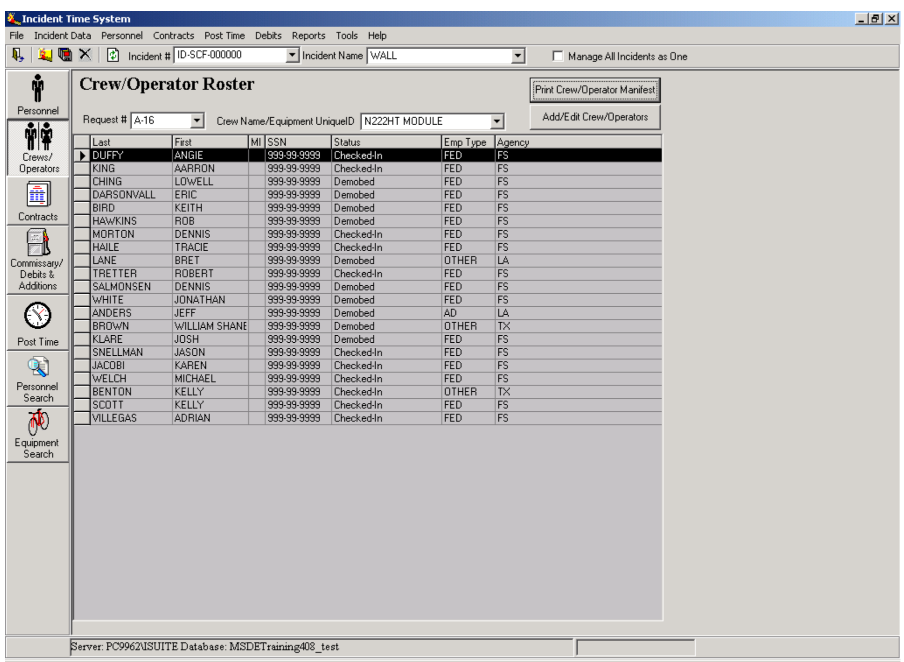
- click the **Request #** drop-down arrow, and then click to select the **Request #** of your choice
- click the **Crew Name/Equipment UniqueID** drop-down arrow, and then click to select the **Crew Name/Equipment** of your choice.

3 To view the crew manifest, click the **Print Crew/Operator Manifest** button.

The crew manifest is a good place to view the initial crew data entered from IRSS.

4 To print the crew manifest, click the **Print** icon on the **Crew Roster Report** dialog box, and then click **OK** on the **Print** dialog box.

The following diagram shows the Crew/Operator Roster screen.



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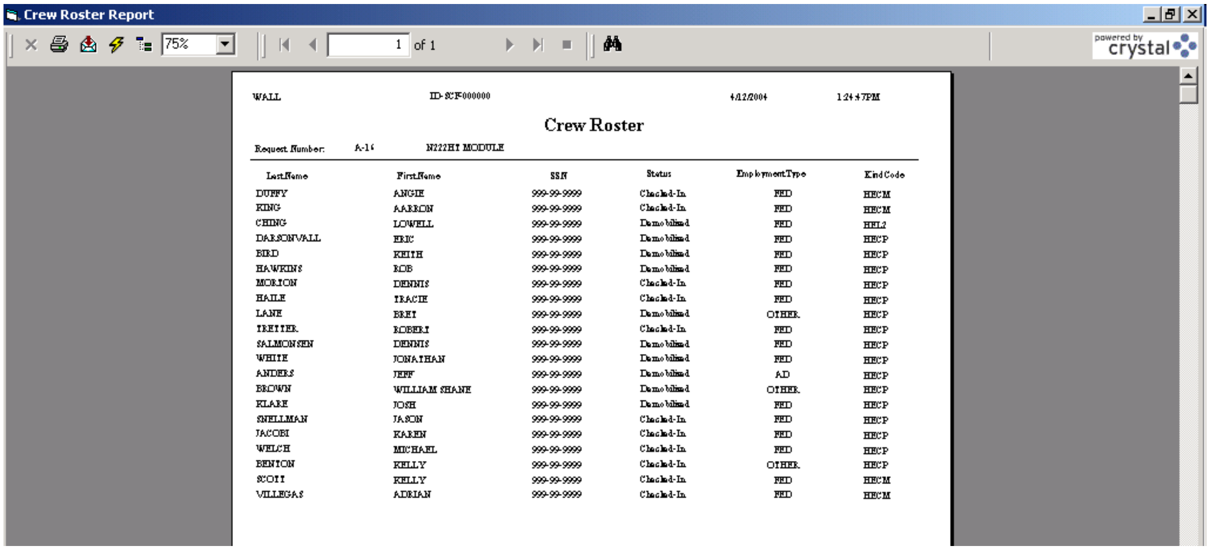
The following diagram shows a sample crew manifest on the Crew Roster Report dialog box.



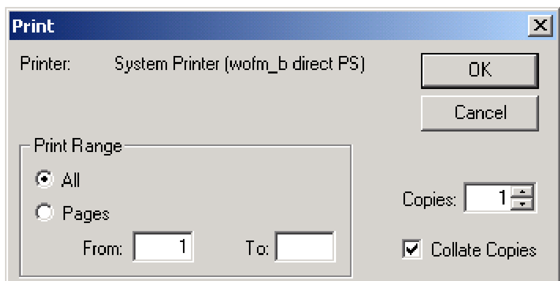
WALL ID-SCF000000 4/12/2004 1:24:47PM

Crew Roster

Request Number: A-16 N222HT MODULE

LastName	FirstName	SSN	Status	EmploymentType	KindCode
DUFFY	ANGIE	999-99-9999	Checked-In	FED	HECM
KING	AARRON	999-99-9999	Checked-In	FED	HECM
CHING	LOWELL	999-99-9999	Demobilized	FED	HEL2
DARSONVALL	ERIC	999-99-9999	Demobilized	FED	HECP
BIRD	KEITH	999-99-9999	Demobilized	FED	HECP
HAWKINS	ROB	999-99-9999	Demobilized	FED	HECP
MORTON	DENNIS	999-99-9999	Checked-In	FED	HECP
HAILE	TRACIE	999-99-9999	Checked-In	FED	HECP
LANE	BRET	999-99-9999	Demobilized	OTHER	HECP
TRETTER	ROBERT	999-99-9999	Checked-In	FED	HECP
SALMONSEN	DENNIS	999-99-9999	Demobilized	FED	HECP
WHITE	JONATHAN	999-99-9999	Demobilized	FED	HECP
ANDERS	JEFF	999-99-9999	Demobilized	AD	HECP
BROWN	WILLIAM SHANE	999-99-9999	Demobilized	OTHER	HECP
KLARE	JOSH	999-99-9999	Demobilized	FED	HECP
SNELLMAN	JASON	999-99-9999	Checked-In	FED	HECP
JACOBI	KAREN	999-99-9999	Checked-In	FED	HECP
WELCH	MICHAEL	999-99-9999	Checked-In	FED	HECP
BENTON	KELLY	999-99-9999	Checked-In	OTHER	HECP
SCOTT	KELLY	999-99-9999	Checked-In	FED	HECM
VILLEGAS	ADRIAN	999-99-9999	Checked-In	FED	HECM

The following diagram shows the Print dialog box that displays when printing a crew manifest.



Creating and editing crews

This section explains how to add and edit crew data in the integrated and stand-alone environments. There are two levels of crew information:

- **Crew level**. Add and/or edit information about the crew.
- **Member/operator level**. Add and/or edit information about individual crew members/operators on a crew.

To edit crew information

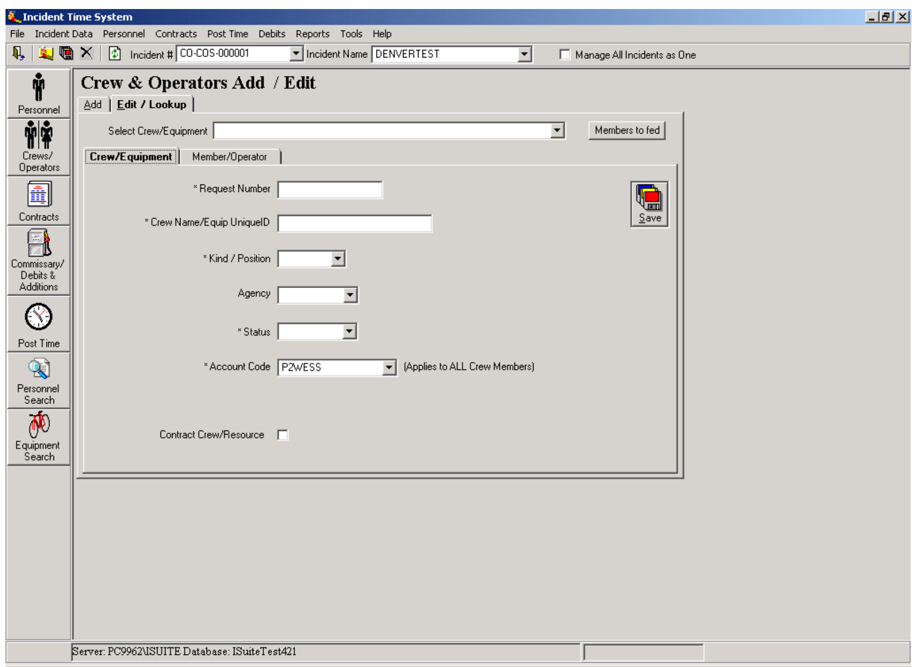
1. On the **Crew/Operator Roster** screen, click the **Add/Edit Crew/ Operators** button.
2. Click the **Edit/Lookup** tab.
3. Click the **Select Crew/Equipment** drop-down arrow, and then click to select the **Crew** or **Equipment** of your choice.
4. Click the **Crew/Equipment** tab.

5 On the **Crew/Equipment** tab, modify the following information as appropriate

- Request Number
- Crew Name/Equipment UniqueID
- Kind/Position
- Agency
- Status
- Account Code
- Contact Crew.

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

The following diagram shows the Crew/Equipment tab on the Crew & Operators Add / Edit screen.



To edit crew members on a crew

1 On the **Crew/Operator Roster** screen, click the **Add/Edit Crew/ Operators** button.

2 Click the **Edit/Lookup** tab.

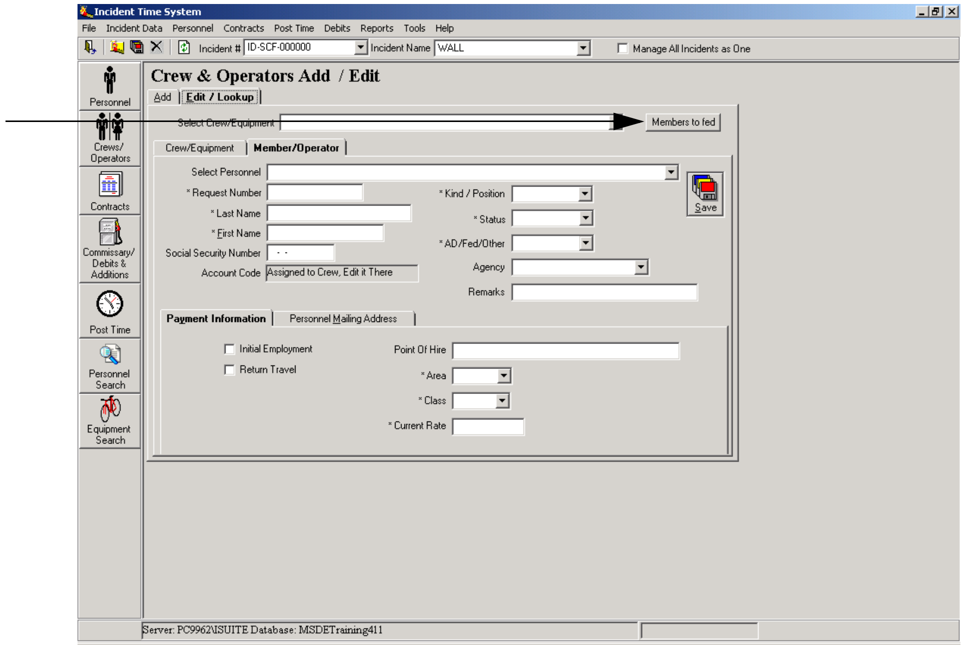
3 Click the **Select Crew/Equipment** drop-down arrow, and then click to select the **Crew** or **Equipment** of your choice.

4 Click the **Member/Operator** tab.

5 Click the **Select Personnel** drop-down arrow, and then click to select the **Crew member/Operator** of your choice.

6 Complete the remaining personnel data as appropriate, and then click the **Save** button.

The following diagram shows the Member/Operator tab on the Crew & Operators Add / Edit screen. The arrow points to the Members to fed button.



To set all crew members/operators with unassigned employment types to “fed”

1 On the **Crew & Operators Add/Edit** screen, click the **Crew/Member/ Edit** tab.

2 Click the **Select Crew/Equipment** drop-down arrow, click to select the **Crew** of your choice, and then click the **Members to fed** button.

To add crew members to an existing crew

In some cases, the crew leader will already be listed on the crew. You can add the remaining crew members, but can only edit the crew leader.

1 On the **Crew/Operator Roster** screen, click the **Add/Edit Crew/ Operators** button.

2 On the **Crew & Operators Add/Edit** screen, click the **Add** tab, and then click the **Member/Operator** tab.

3 Click the **Crew/Equipment to Add To** drop-down arrow, and then click to select the **Crew** or **Equipment** of your choice.

4 Complete the following information as appropriate

- First Name
- Last Name
- Social Security Number
- Account Code

- Kind/Position
- Status
- AD/Fed/Other
- Agency
- Remarks.

5 On the **Payment Information** tab, complete the following information as appropriate

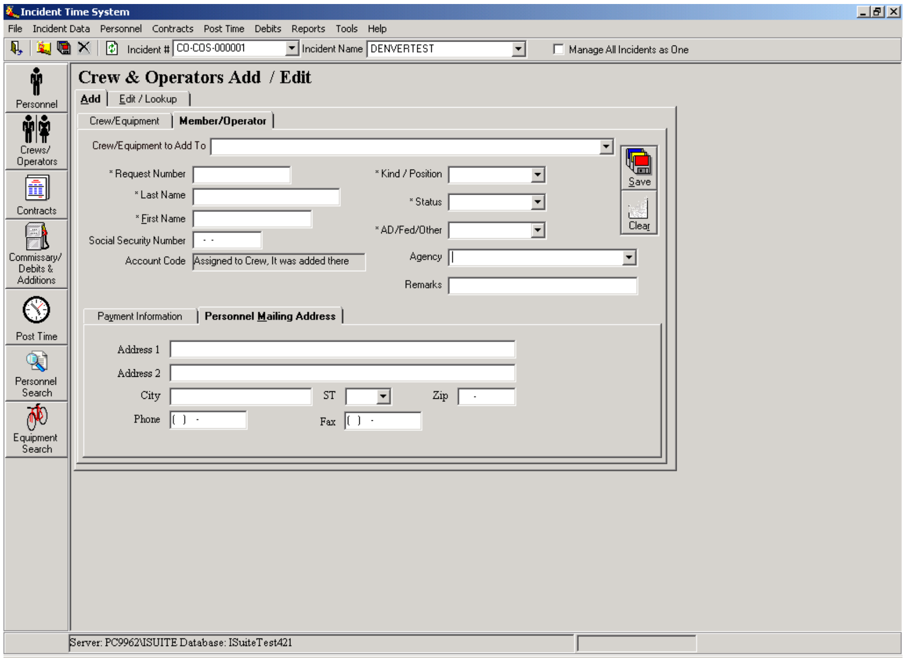
- Initial Employment
- Return Travel
- Point of Hire
- Area
- Class
- Current Rate.

6 Click the **Personnel Mailing Address** tab, and then complete the following information as appropriate

- Address 1
- Address2
- City
- ST
- Zip
- Phone
- Fax.

7 Click the **Save** button.

The following diagram shows the Member/Operator tab on the Add tab on the Crew & Operators Add/Edit screen.



To edit the leader of a crew to add crew members

1 On the **Crew/Operator Roster** screen, click the **Add/Edit Crew/ Operators** button.

2 On the **Edit/Lookup** tab, click the **Select Crew/Equipment** drop-down arrow, and then click to select the **Crew** that contains the .

3 Click the **Member/Operator** tab.///

To create a crew

1 On the **Crew/Operator Roster** screen, click the **Add/Edit Crew/ Operators** button.

2 On the **Crew & Operators Add/Edit** screen, click the **Add** tab.

3 On the **Crew/Equipment** tab, complete the following information as appropriate

- Request Number
- Crew Name/Equipment UniqueID
- Kind/Position
- Agency
- Status
- Account Code
- Contract Crew.

4 Click the **Save** button.

5 Add crew members as appropriate.

For more information about adding crew members, see the previous task, "To add crew members to an existing crew."

To demob a crew

1 On the **Crew/Operator Roster** screen, click the **Add/Edit Crew/ Operators** button.

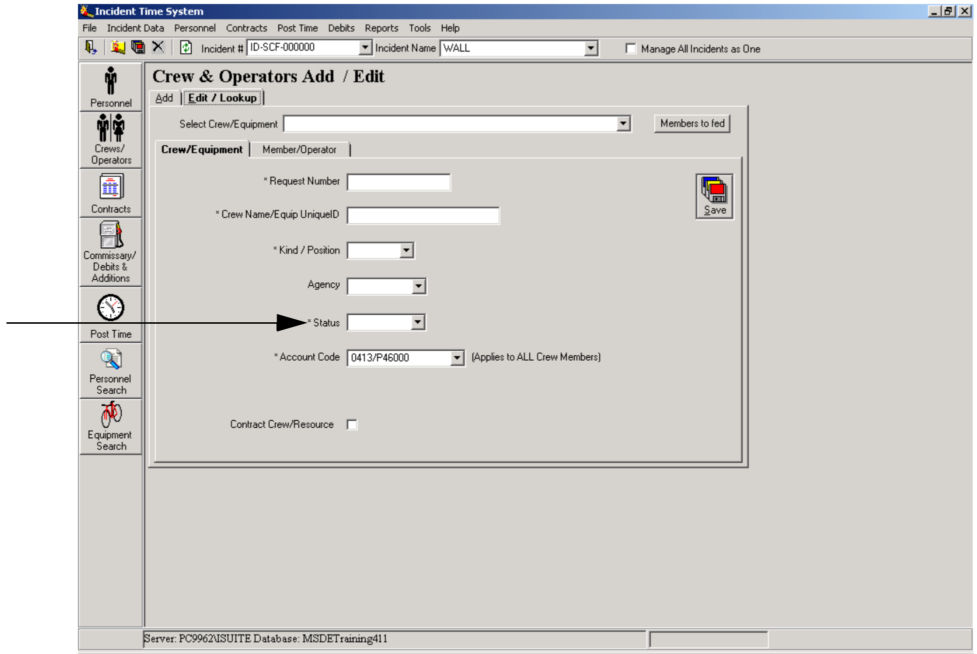
2 Click the **Edit/Lookup** tab.

3 Click the **Select Crew/Equipment** drop-down arrow, and then click to select the **Crew** or **Equipment** of your choice.

4 Click the **Crew/Equipment** tab.

5 Click the **Status** drop-down arrow, click to select **Demobed**, and then click the **Save** button.

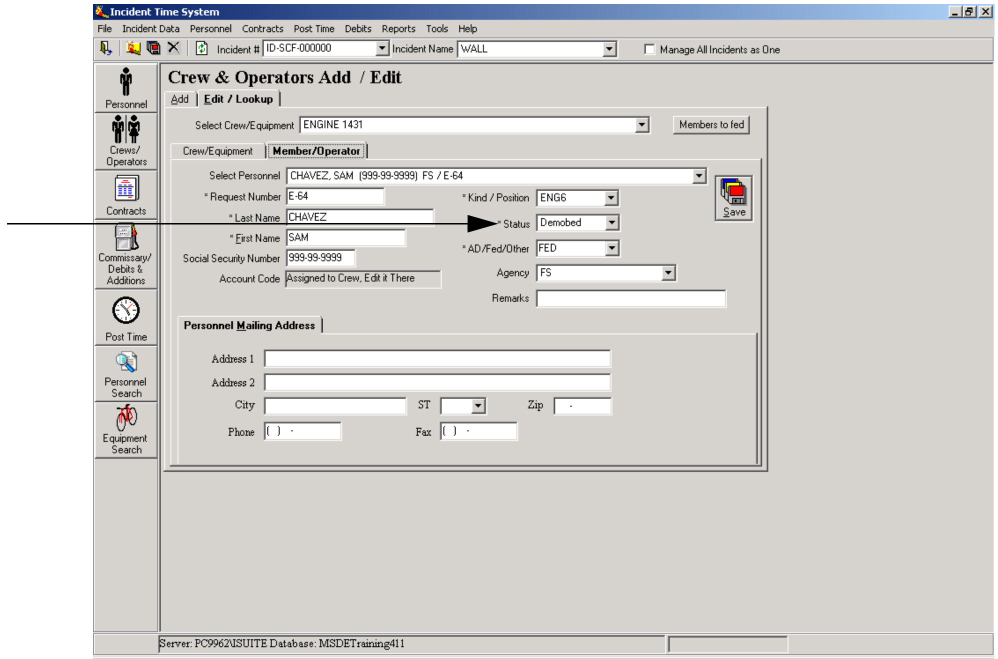
The following diagram shows the Edit/Lookup tab on the Crew & Operators Add / Edit screen. The arrow points to the “Demobed” Status for the crew.



To demob a crew member/operator

1. On the **Crew/Operator Roster** screen, click the **Add/Edit Crew/ Operators** button.
2. Click the **Edit/Lookup** tab.
3. Click the **Select Crew/Equipment** drop-down arrow, and then click to select the **Crew** or **Equipment** of your choice.
4. Click the **Member/Operator** tab.
5. Click the **Select Personnel** drop-down arrow, and then click to select the **Crew member/Operator** of your choice.
6. Click the **Status** drop-down arrow, click to select **Demobed**, and then click the **Save** button.

The following diagram shows the Edit/Lookup tab on the Crew & Operators Add / Edit screen. The arrow points to the "Demobed" Status for the crew member.



Posting time for crews and crew members/operators

This section explains how to post time for crews and crew members/ operators. Remember these key points when posting time for crews and crew members/operators:

- Posting time is performed the same, whether working in the stand-alone or integrated environments.
- Do not edit the Stop and Start times, Special codes, and rates on the Crew Member/Operator Post Detail.
- You cannot edit the Date. To change the Date you must delete and then repost that entry.
- The Date automatically changes for posting that extends beyond midnight for any given shift.
- If you post overlapping hours, you must verify the hours before you can proceed.
- Post all time to a crew member before he/she is demobed. If you use the Select All button and select a demobed crew member, that time will not be posted!
- explain grid functionality, editing, deleting, copy and past, reviewing.///

To post time crew time

*Remember, you can click to select the **Use Enter Key as Tab for Posting** check box for faster, 10-key data entry!*

1 Click the **Post Time** button.

2 On the **Incident Post** screen, click the **Crews & Operators** tab.

3 Click the **Crew Name/Equip UniqueID** drop-down arrow, and then click to select the **Crew Name** or **Equipment Name** of your choice.

4 Under **Crew Members**, click to select the **Crew Member(s)** of your choice.

*To select more than one **Crew Member**, press and hold CTRL, and then click to select every **Crew Member** of your choice.*

5 In the **Date** box, type the **Date**, in the format MMDDYYYY.

*When completing the **Date** box, the cursor will automatically advance to the next date field as you type.*

*To enter the current **Date**, type **=** (equal sign). To enter yesterday's **Date**. type **-** (minus sign).*

6 Click the **Start Time** drop-down arrow, and then click to select the **Start Time** of your choice.

7 Click the **Stop Time** drop-down arrow, and then click to select the **Stop Time** of your choice.

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

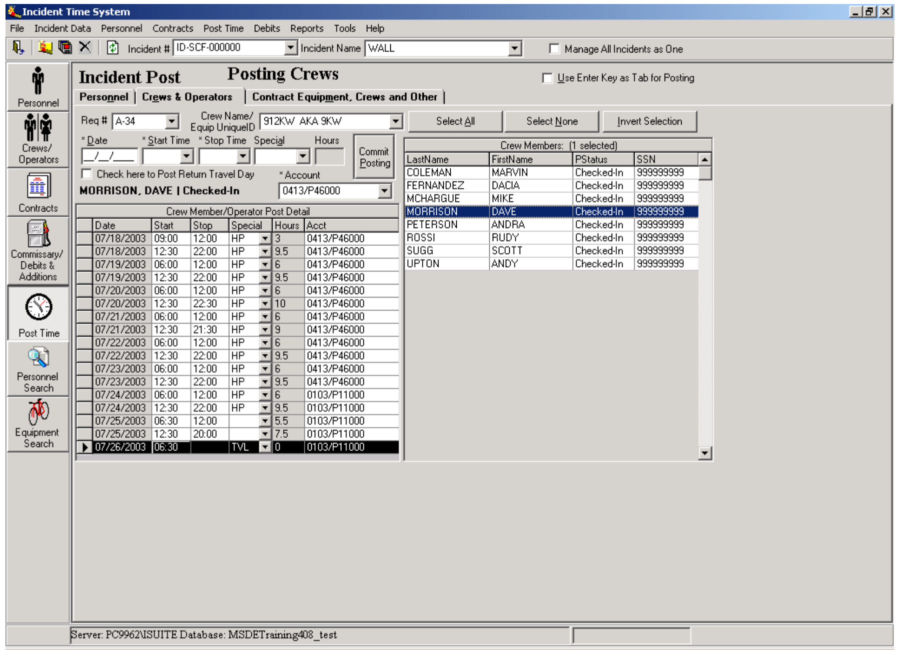
9 Click the **Special** drop-down arrow, and then click to select the **Special** code of your choice.

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

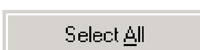
*Clicking the **Commit Posting** button saves your data.*

11 On the **Incident Time System: Post Results** dialog box, click **OK**.

The following diagram shows the Crews & Operators tab on the Incident Post Posting Crews screen.



To select all crew members/operators



- On the **Incident Post** screen, click the **Crews & Operators** tab, and then click the **Select All** button.

To cancel all selected crew members/operators

- On the **Incident Post** screen, click the **Crews & Operators** tab, and then click the **Select None** button.

To cancel all selected crew members/operators and select all others

The Invert Selection button makes posting crew leader and crew member time easier. First, post the Crew Leader’s time, click the Invert Selection button, and then post the crew members’ time.

- On the **Incident Post** screen, click the **Crews & Operators** tab, and then click the **Invert Selection** button.

To repost a day of time

1 On the **Incident Post** screen, click the **Crews & Operators** tab.

2 Click the **Crew Name/Equip UniqueID** drop-down arrow, and then click to select the **Crew Name** or **Unique ID** of your choice.

Be sure to select the correct crew member.

3 Under **Crew Members**, click to select the **Crew Member** of your choice.

4 Locate the day and time you want to repost, and then type the same **Date** as the existing **Date**.

5 Complete the **Start Time**, and **Stop Time** boxes with the new information.

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

7 Click the **Special** drop-down arrow, and then click to select the **Special** code of your choice.

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

9 On the **Overlapping Hours** dialog box, click **Yes** to overwrite the previous post with the current one.

10 On the **Incident Time System: Post Results** dialog box, click **OK**.

To delete a row of posted time

The Delete button is located on the ITS toolbar.

1 On the **Incident Post** screen, click the **Crews & Operators** tab.

2 Click the **Crew Name/Equip UniqueID** drop-down arrow, and then click to select the **Crew Name** or **Unique ID** of your choice.

Be sure to select the correct crew member.

3 Under **Crew Members**, click to select the **Crew Member** of your choice.

4 Under **Crew Member/Operator Post Detail**, click to select the day and time you want to delete.

5 Click the **Delete** button.

6 On the **ITS: Delete Posting for Crew Member(s)** dialog box, click **Yes**.

To copy and paste posted time

1 On the **Incident Post** screen, click the **Crews & Operators** tab.

2 Click the **Crew Name/Equip UniqueID** drop-down arrow, and then click to select the **Crew Name** or **Unique ID** of your choice.

3 Under **Crew Members**, click to select the **Crew Member** of your choice.

4 Under **Crew Member/Operator Post Detail**, click to select the day and time you want to copy.

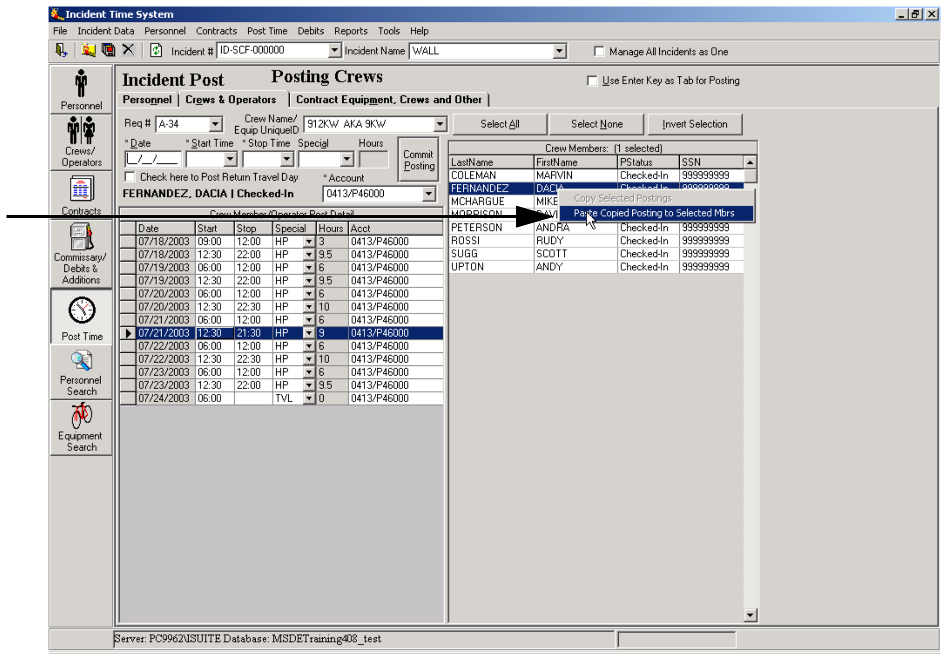
5 Right-click on that row, and then point to **Copy Selected Postings**.

6 Under **Crew Members**, click to select the destination **Crew Member** for the copied row of time.

7 Right-click the destination **Crew Member** and then point to **Paste Copied Posting to Selected Mbrs**.

8 On the **Incident Time System: Post Results** dialog box, click **OK**.

The following diagram shows the Incident Post - Posting Crews screen. The arrow points to the Paste Copied Posting the Selected Mbrs option highlighted on the Incident Post Posting Crews screen.



To post return travel time

1 On the **Incident Post** screen, click the **Crews & Operators** tab.

2 Click the **Crew Name/Equip UniqueID** drop-down arrow, and then click to select the **Crew Name** or **Unique ID** of your choice.

3 Under **Crew Members**, click to select the **Crew Member** of your choice.

4 Under **Crew Member/Operator Post Detail**, click to select the row of time of your choice, and then click to select the **Check here to Post Return Travel Day** check box.

5 Complete the **Date**, **Start Time**, and **Stop Time** boxes.

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

7 On the **Overlapping Hours** dialog box, click **Yes** to overwrite the previous post with the current one.

8 On the **Incident Time System: Post Results** dialog box, click **OK**.

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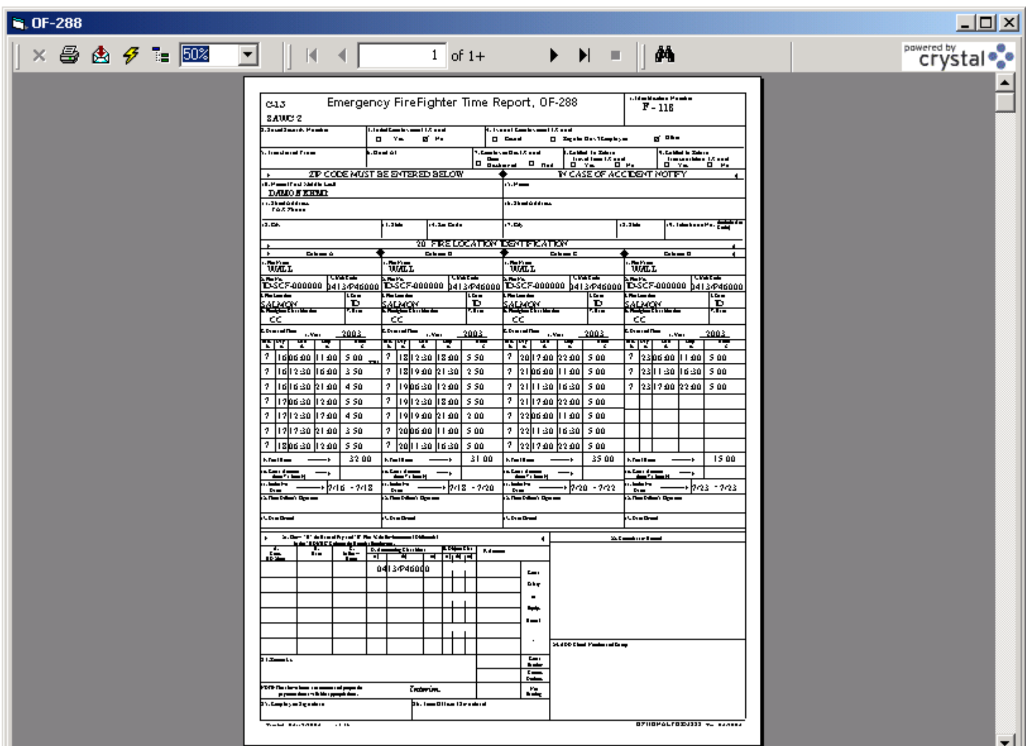
Reviewing an OF-288 for crews

The OF-288 lists all incidents and all accounting codes for the selected request number, crew name, person, or all personnel.

To review an OF-288

1. On the **Reports** menu, click **OF-288**.
2. On the **OF-288** dialog box, click the **Crew Name** drop-down arrow, and then click to select the **Crew Name** or **Unique ID** of your choice.
3. To view the final OF-288 for the crew leaving the incident, click to select the **Final** check box.
4. To preview the OF-288, click the **Preview Report** button.
5. To print the OF-288, click the **Print Report** button.

The following diagram shows a sample OF-288 for crews.



Working with contractor and agreement data

This section explains how to add and edit contractor and agreement data. In ITS, you must add and attach contractor and agreement data to a resource to process payment documents. Remember these key points when working with contractor and agreement data:

- You only need to enter contractor and agreement data once.
- For multiple resources sharing the same contractor and agreement, pick the specific contractor and agreement and then attach it to the resource.
- You can assign up to six rates to each resource.
- Units of measure include Daily, Each, Hourly, and Mileage.

Topics in this section include:

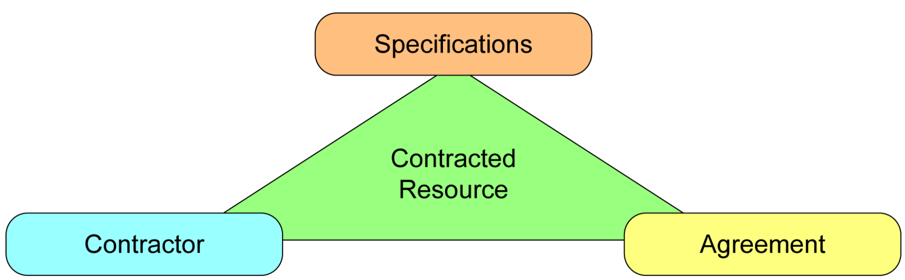
- Understanding the contractor, agreement, and resource relationship
- Understanding rate types and units of measure
- Managing contractor and agreement data.

Understanding the contractor, agreement, and resource relationship

In ITS, a contract consist of three parts:

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

The following diagram shows the relationship between the contractor, agreement, specifications, and resource.



Understanding rate types and units of measure

Together, rate types and units of measure allow ITS to calculate the cost of the contracted resource. The following list briefly explains rate types and units of measure:

- **Primary rate**. All contracted resources must have a primary rate designation.
- **Special rate**. A contracted resource may or may not have one to five special rate designations.

- **Units of measure**. Units of measure include Daily, Each, Hourly, and Mileage.

Be sure to match the correct rate with the correct unit of measure! For example, a contracted piece of equipment may have a primary, daily rate of $52.00 and a special, mileage rate of $0.32.

Managing contractor and agreement data

This section explains how to review and create contractors and agreements, and how to attach an agreement to the contractor.

To review the list of existing contractors

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

1 Click the **Contracts** button.

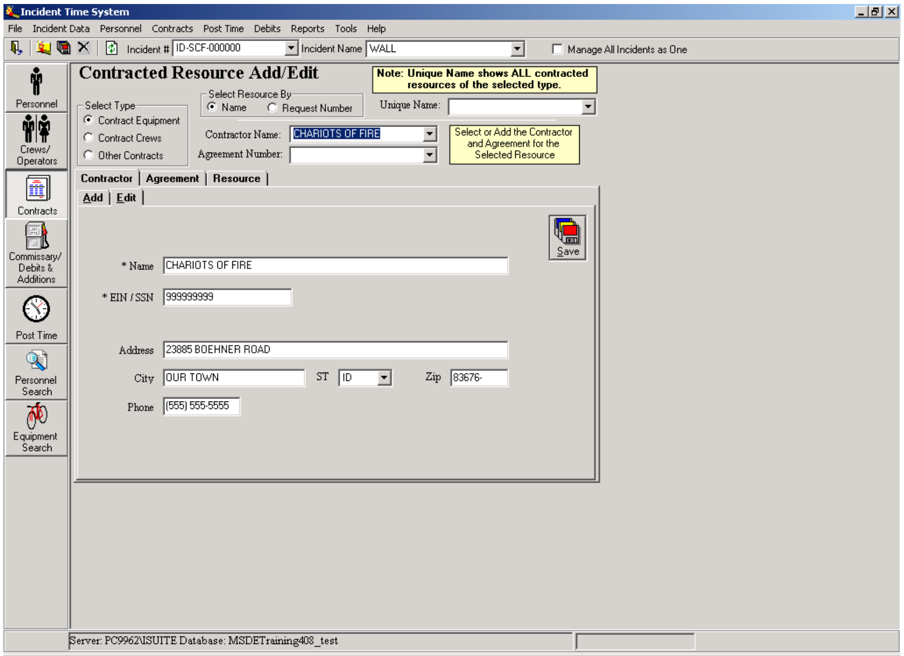
2 On the **Contracted Resource Add/Edit** screen under **Select Type**, click to select one of the following resource **Types**:

- Contract Equipment
- Contract Crews
- Other Contracts.

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

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

The following diagram shows the Contracted Resource Add/Edit screen for contracted equipment.



To create a contractor

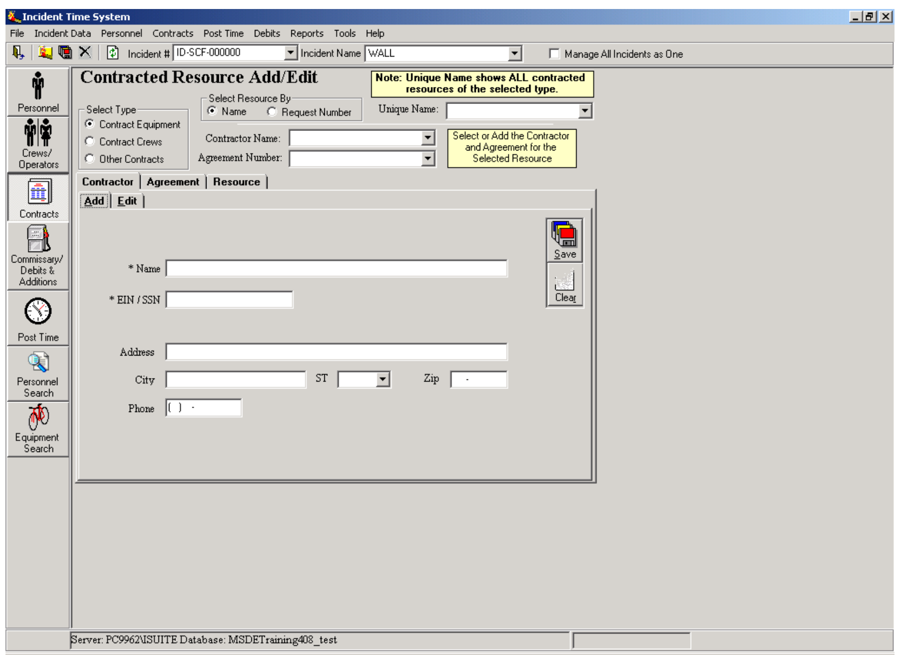
1 On the **Contracted Resource Add/Edit** screen, complete the following information as appropriate

- Name
- EIN/SSN
- Address
- City
- ST
- Zip
- Phone.

2 Click the **Save** button.

Next, determine if an agreement already exists and is attached to the contractor. If not, create an agreement and attach it to the contractor. If so, edit the resource specifications and then link them to the contractor/ agreement.

The following diagram shows the Add tab on the Contracted Resource Add/ Edit screen.



To create an agreement and attach it to the contractor

1 On the **Agreement** tab, click the **Add tab**.

2 In the **Agreement Number** box, type the **Agreement Number**.

3 In the **Begin Date** box, type the beginning date of the agreement, in the format MMDDYYYY.

4 In the **Expiration Date** box, type the expiration date of the agreement, in the format MMDDYYYY.

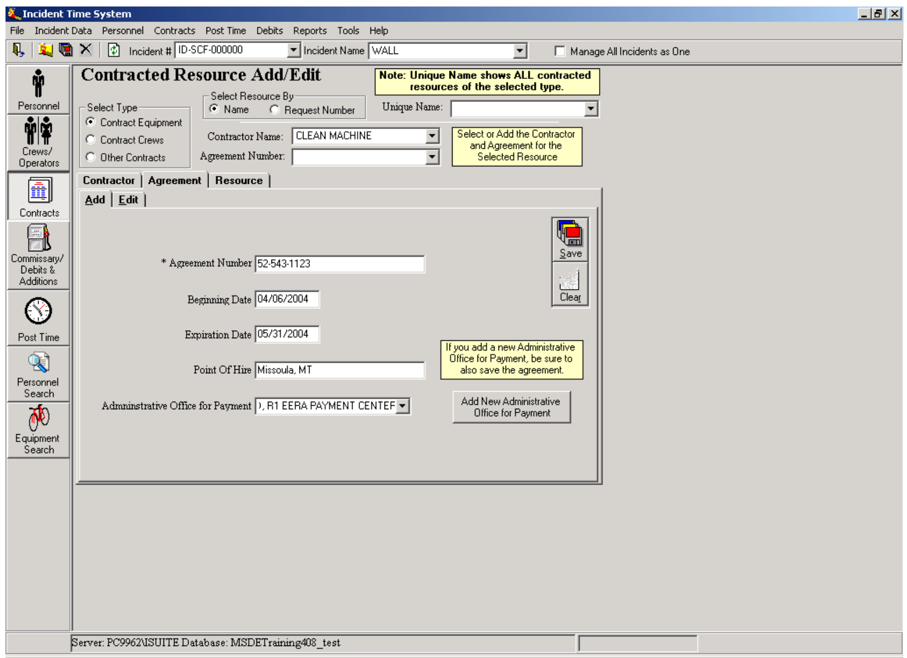
5 In the **Point of Hire** box, type the location at the time of hire.

6 Click the **Administrative Office for Payment** drop-down arrow, and then click to select the **Administrative Office** of your choice.

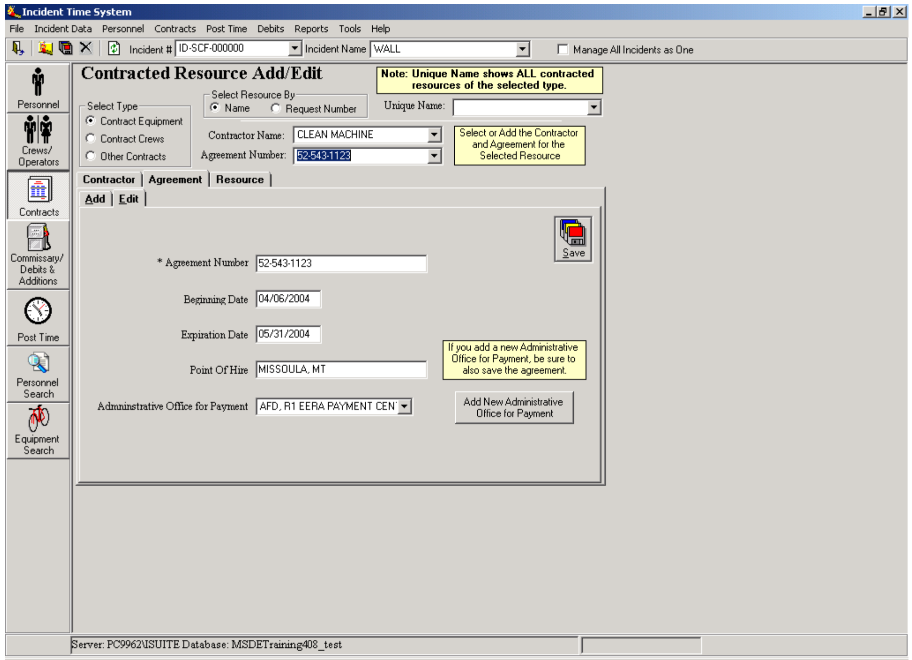
7 To attach the agreement to the contractor, click the **Agreement Number** drop-down arrow, and then click to select the **Agreement Number** of your choice.

8 Click the **Save** button.

The following diagram shows an example of a new agreement on the Contracted Resource Add/Edit screen.



The following diagram shows the new agreement attached to the contractor.



To edit resource specifications and link it to a contractor and agreement

In the integrated environment, the resource is already added to the incident database from IRSS. In ITS, you must edit the resource specifications and create a new name for it, then link the resource together with the contractor and agreement.

1. On the **Contracted Resource Add/Edit** screen under **Select Resource By**, click **Name** or **Request** number.
2. Click the **Unique Name** or **Request Number** drop-down arrow, and then click to select the **Name** or **Request Number** of your choice for the **Contractor/Agreement** of your choice.
3. On the **Resource** tab on the **Edit** tab, type a new, unique name for the resource in the **Unique ID** box.
4. Complete the **Make**, **Model**, and **Remarks** boxes as appropriate.
5. Click to select the **Gov't Operator** and **Gov't Supplies** check boxes, as appropriate.
6. Complete the **Hired Date** and **Time** boxes and the **Release Date** and **Time** boxes, as appropriate.
7. Click to select the **Withdrawn** check box, as appropriate.
8. Click the **Rate Type** drop-down arrow, and then click to select the **Rate Type** of your choice.

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

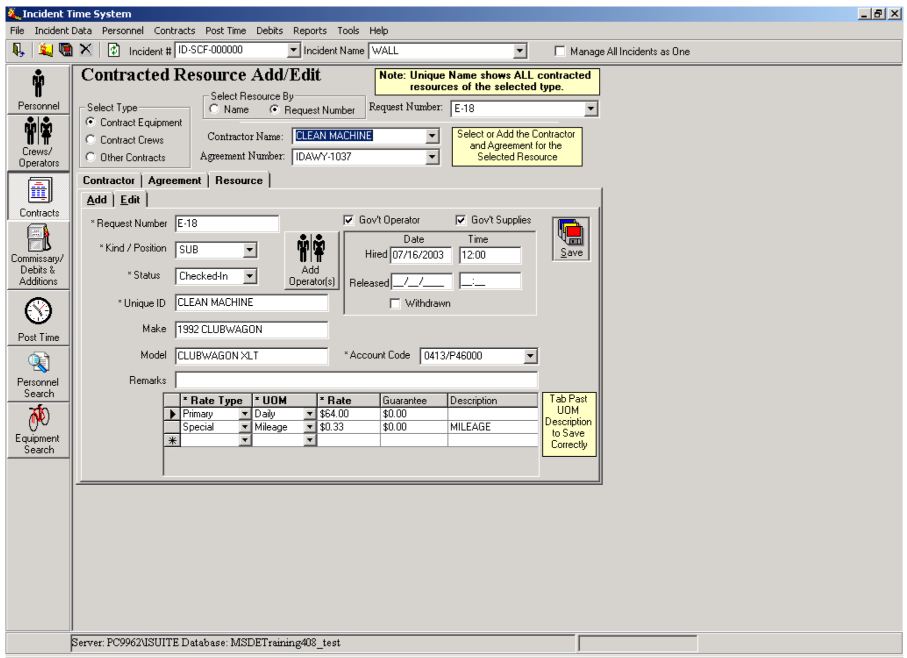
10 Press TAB twice to advance the cursor to the next **Rate Type** box.

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

12 Click the **Save** button.

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

The following diagram shows the Contracted Resource Add/Edit screen for linking a resource to the contractor and agreement.



To add an operator to a resource

If a leader was added by IRSS into the incident database, you will only need to edit the operator information.

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

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

3 On the **Resource** tab on the **Edit** tab, click the **Add Operator(s)** button.

4 On the **Crews & Operators Add/Edit** screen, on the **Add** tab on the **Member/Operator** tab, add or edit the following information as appropriate

- First Name
- Last Name
- Social Security number
- Account Code
- Kind/Position
- Status
- AD/Fed/Other
- Agency
- Remarks.

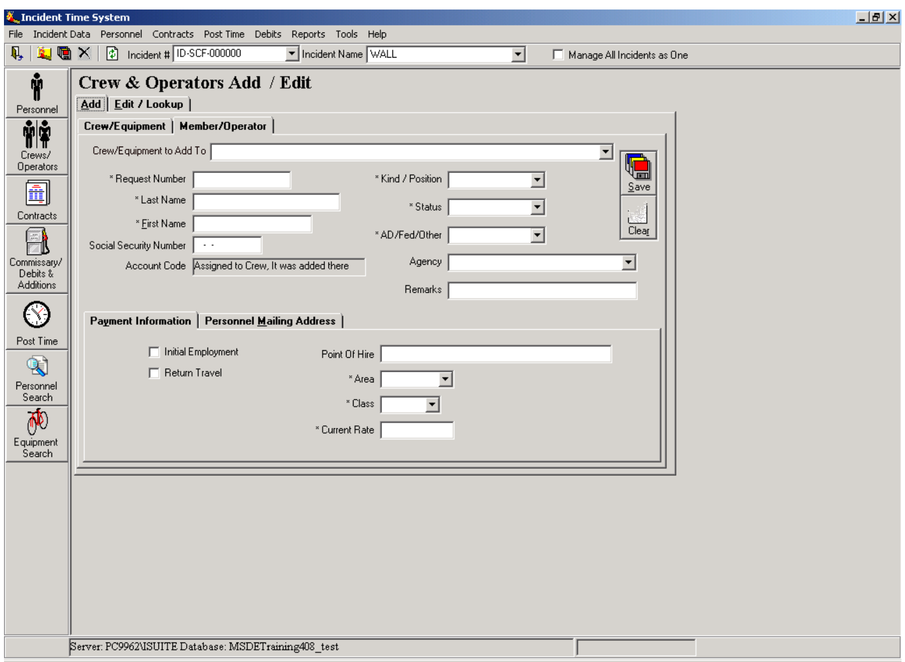
5 Complete the **Payment Information** tab as appropriate.

6 Click and then complete the **Personnel Mailing Address** tab as appropriate.

7 Click the **Save** button.

Add any additional contracted resources using information listed on the EERAs.

The following diagram shows the Member/Operator tab on the Crews & Operators Add/Edit screen for adding an operator to a resource.



Posting time for contracted resources

This section explains how to post time for contracted resources. The SF-297, "Emergency Equipment Shift Ticket," lists the information you need to post contracted resources time in ITS.

Remember these key points when posting time for contract equipment:

- **Daily rate**. You can post for one date or for a range of dates.
- **Hourly rate**. To ensure a guarantee is posted for equipment not currently being used on any given day but still under hire, enter a minimum of 15 minutes of work time and 1 mile of mileage.
- **Guarantee**. If applicable, the guarantee amount is shown only on the OF-286, but will not display on the Incident Post - Posting Equipment screen.

The following table outlines how to post units of measure for contracted resources in ITS.

To post	*Do this*
Daily rate	Complete **Start Date** and **End Date**.
Hourly rate	Complete **Date** and **Start** and **Stop** times.
Mileage	Complete **Date** and **Miles**.
Each	Complete **Date** and **Each**.
equipment not being used on any given day but still under hire	Enter a minimum of **15 minutes** of work time and **1 Mile**.

The guarantee amount is shown only on the OF-286 but does not display on the Incident Post-Posting Equipment screen.

To post contracted resource time

*Remember, you can click to select the **Use Enter Key as Tab for Posting** check box for faster, 10-key data entry!*

1. Click the **Post Time** button, and then click the **Contract Equipment, Crews and Other** tab.
2. Under **Select Type**, select the equipment type of your choice.
3. Click the **Contractor Name** drop-down arrow, and then click to select the **Contractor Name** of your choice.
4. Perform one of the following
   - click the **Equipment Unique ID** drop-down arrow, and then click to select the **Equipment** of your choice
   - click the **Request Number** drop-down arrow, and then click to select the **Request Number** of your choice.
5. Click the **Account Code** drop-down arrow, and then click to select the **Account Code** of your choice.

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

7 If one-half rate applies, click to select the **1/2 Rate** check box.

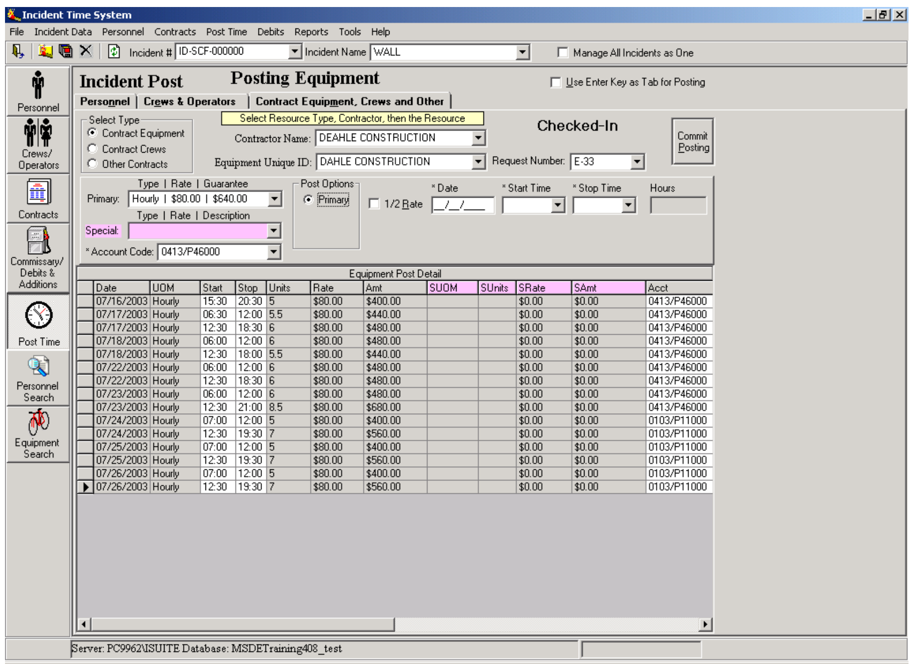
8 Post the required information as appropriate for that **Rate Type** and **Unit of Measure**.

Remember to review the previous table for posting rates and units of measure.

---

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

The following diagram shows the Incident Post screen for posting contract equipment time.



To repost a day of time by overwriting the existing entry

When reposting contracted resource time, you can either add to the original posting or overwrite the existing entry.

---

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

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

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

4 Perform one of the following

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

 Incident Time System User's Guide

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

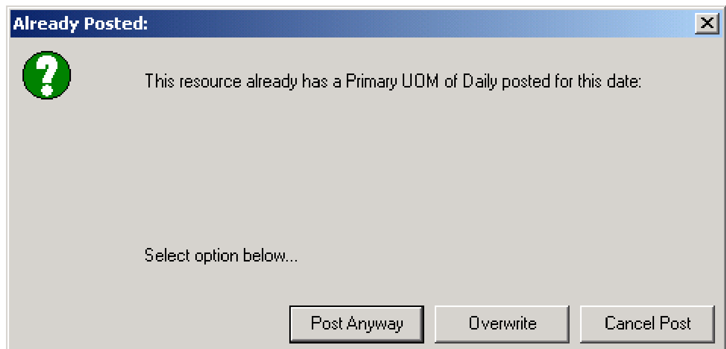
6 Under **Post Options**, click to select the **Rate Type** of your choice.

7 Complete the appropriate **Start Date** and **End Date** boxes.

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

9 On the **Already Posted** dialog box, click the **Overwrite** button.

The following diagram shows the Already Posted dialog box.



To delete a row of posted time

1 Click the cursor in the **Acct** column for the row of time you want to delete.

2 On the **ITS toobar**, click the **Delete** button.

To review an OF-286 for contracted resources

The OF-286 is an invoice for a contracted resource on an incident, and lists the rates and dates the contracted resource was used.

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

2 On the **OF-286** dialog box, perform one of the following

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

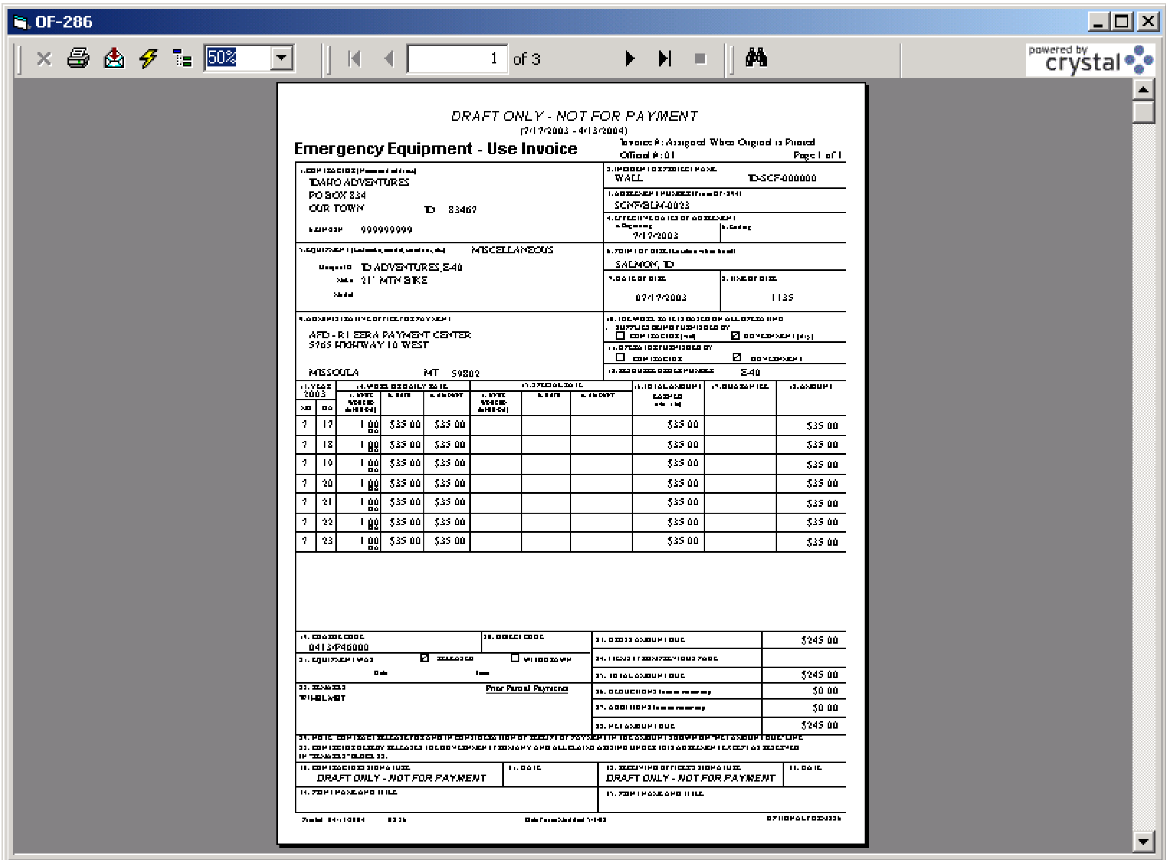
3 Under **Report Options**, click to select one of the following

- OF-286 with Itemized Deductions
- OF-286 Only
- Itemized Deductions Only.

4 To preview the report, click the **Preview Report** button.

5 To print the report, click the **Print Report** button.

The following diagram shows a sample OF-286 for a contracted resource.



Working with commissary debits and additions

Working with commissary debits and additions is straightforward. Once you select a resource, enter the date, description, and amount. Then review the details of the transactions on the OF-288 and OF-286.

To preview a Commissary Authorization form

You can view and/or print a Commissary Authorization form by request number, crew name, or person.

1 On the **Reports** menu, click **Commissary Authorization**.

2 On the **Commissary Authorization** dialog box, perform one of the following

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

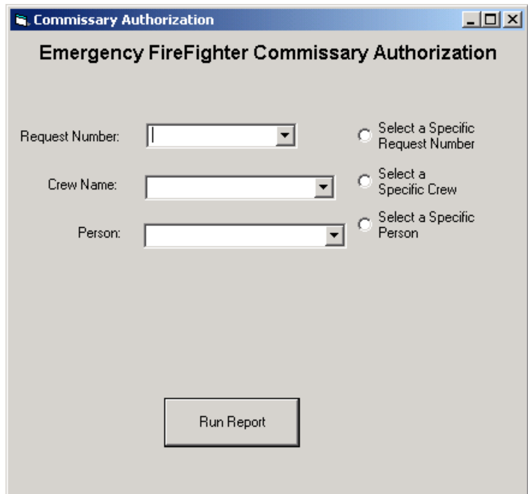
Incident Time System User's Guide

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

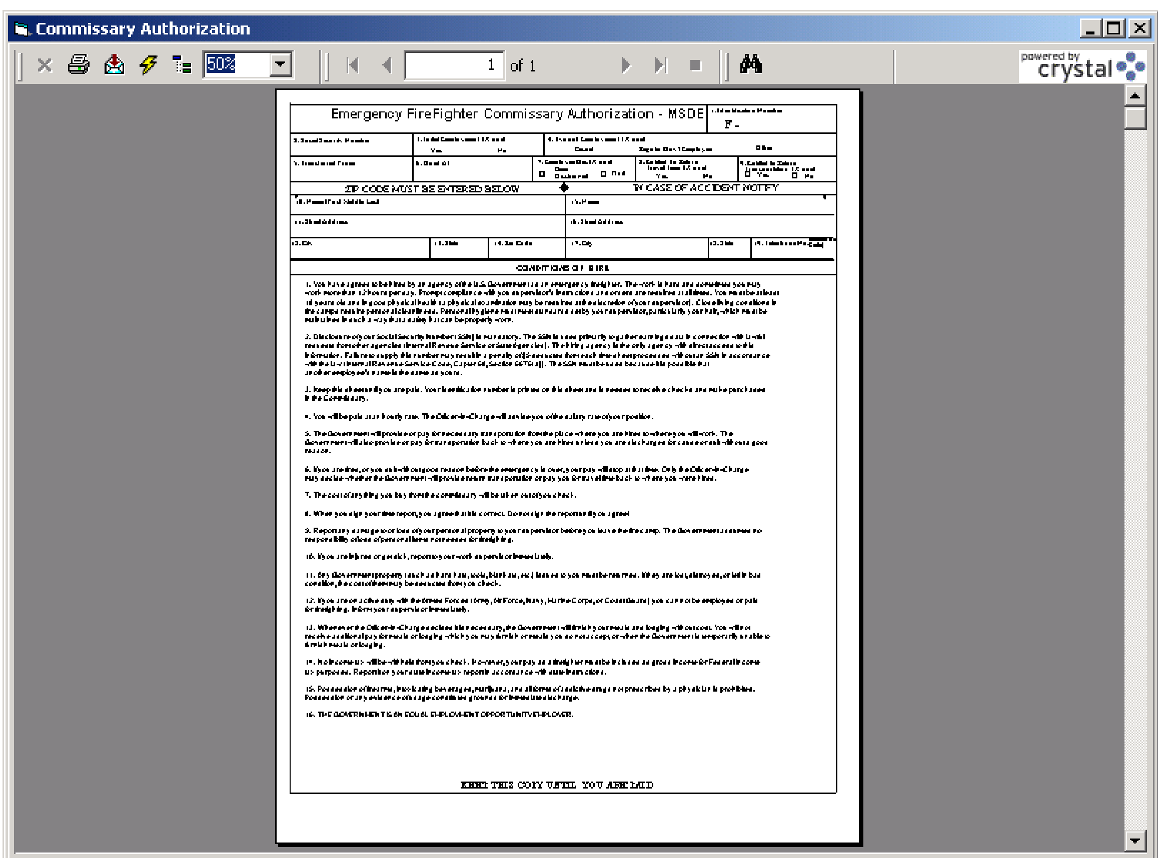
3 Click the **Run Report** button.

4 To print the report, click the **Print Report** icon.

The following diagram shows the Commissary Authorization dialog box.



The following diagram shows a sample Emergency FireFighter Commissary Authorization as it appears on your screen.



To post deductions to a personnel resource

Remember to press T*AB* *to advance the cursor to the next box. Information you enter is auto-saved as soon as you enter a new blank line.*

1 Click the **Commissary/Debits & Additions** button.

2 On the **Personnel** tab, click the **Person** drop-down arrow, and then click to select the **Person** of your choice.

3 In the **Activity Date** column, type the **Date** in the format MMDDYYYY.

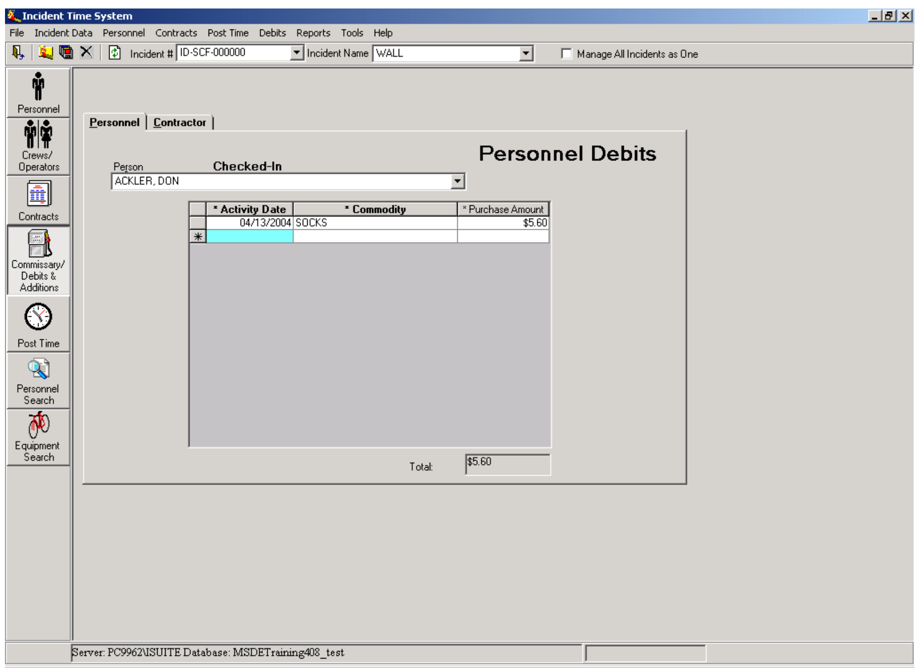
4 In the **Commodity** column, type the name of the **Commodity**.

Commodities include items such as socks, boots, and toiletries.

5 In the **Purchase Amount** column, type the **Purchase Amount** for those commodities, in the format 99.99.

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

The following diagram shows a sample Personnel Debits screen.



To post contractor deductions to a resource

1 Click the **Commissary/Debits & Additions** button, and then click the **Contractor** tab.

2 Under **Select Type**, click to select one of the following

- Contract Equipment
- Contract Crews
- Other Contracts.

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

4 Click the **Contract Resource** drop-down arrow, and then click to select the **Contract Resource** of your choice.

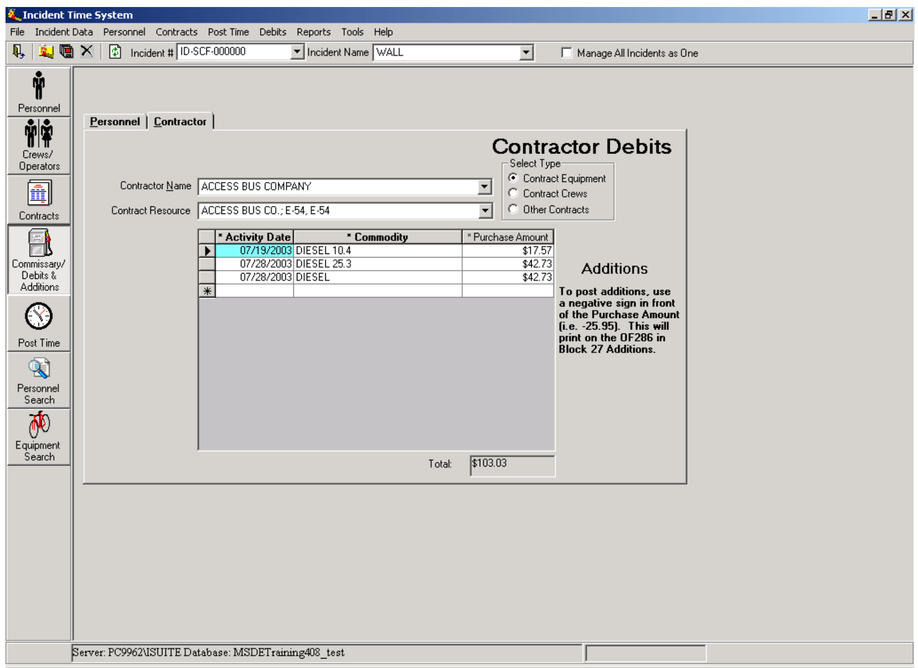
5 In the **Activity Date** column, type the **Date** in the format MMDDYYYY.

6 In the **Commodity** column, type the name of the **Commodity**.

7 In the **Purchase Amount** column, type the **Purchase Amount** for those commodities, in the format 99.99.

8 To save the charges and advance to the next new line, press TAB.

The following diagram shows the Contractor Debits screen.



To post a contractor addition

1 Click the **Commissary/Debits & Additions** button, and then click the **Contractor** tab.

2 On the **Contractor** tab under **Select Type**, click to select the **Type** of your choice.

3 Click to select the **Contractor Name** and **Contract Resource** of your choice.

4 In the **Activity Date** column, type the **Date** in the format MMDDYYYY.

5 In the **Commodity** column, type the **Commodity**.

6 In the **Purchase Amount** column, type **-Purchase Amount** for those commodities.

Typing "-" (minus sign) in front of the Purchase Amount allows you to post an addition to the OF-286 report.

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

Notice that the negative symbol is replaced by parentheses in the purchase amount column.

To review an OF-288 for resources with posted deductions and additions

The deductions page displays on a separate window, behind the OF-288 and the OF-286.

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

2 On the **OF-288** dialog box, click to select one of the following

- Request Number
- Crew Name
- Person.

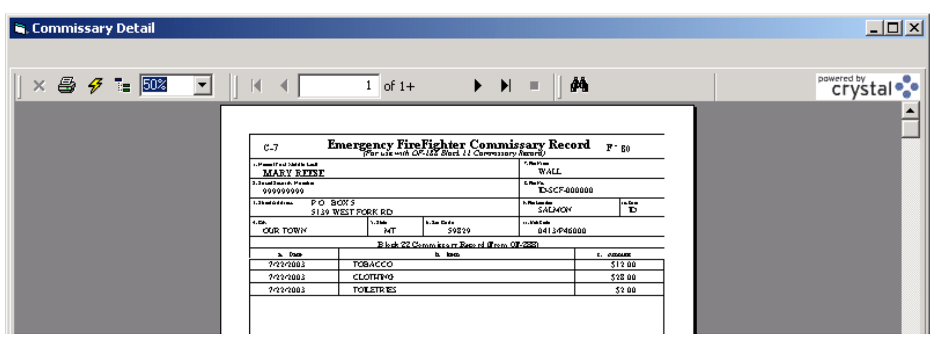
3 To view the final OF-288 for the crew leaving the incident, click to select the **Final** check box.

4 To preview the OF-288, click the **Preview Report** button.

5 To review the deductions page of the OF-288, click the **Minimize** button on the OF-288 window.

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

The following diagram shows a sample Commissary Record as it appears on your screen.



To review an OF-286 for resources with posted deductions and additions

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

2 On the **OF-286** dialog box, click the **Contractor** drop-down arrow, and then click to select the **Contractor Name** of your choice.

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

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

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

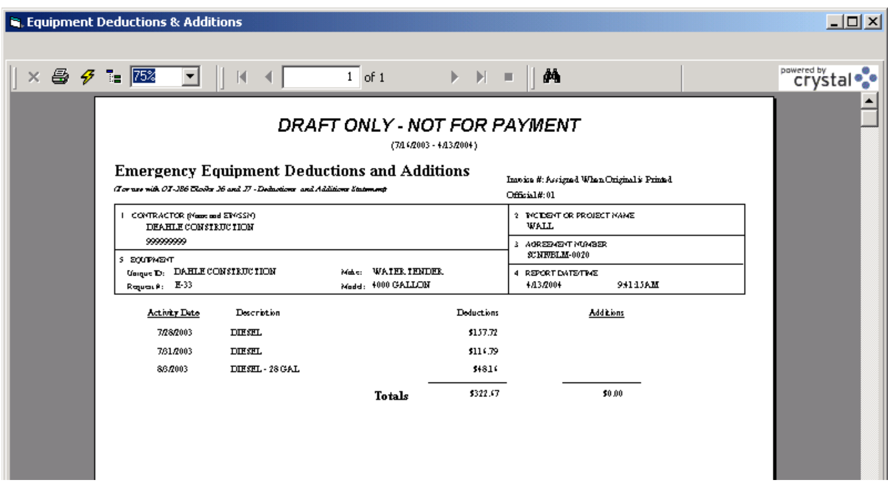
- OF-286 with Itemized Deductions
- OF-286 Only
- Itemized Deductions Only.

6 To preview the OF-288, click the **Preview Report** button.

7 To review the deductions page of the OF-286, click the **Minimize** button on the OF-286 window.

8 To print the OF-286, click the **Print Report** button.

The following diagram shows a sample Emergency Equipment Deductions and Additions report as it appears on your screen.



Working with reports

This section explains how to prepare, view, and print reports available in ITS. The Reports menu lists management, equipment, commissary authorization, crew roster, and pay document reports.

To review and print a Commissary Authorization form

You can view and/or print a Commissary Authorization form by request number, crew name, or person.

1 On the **Reports** menu, click **Commissary Authorization**.

2 On the **Commissary Authorization** dialog box, perform one of the following

- click the **Request Number** drop-down arrow, and then click to select the **Request Number** of your choice
- click the **Crew Name** drop-down arrow, and then click to select the **Crew Name** of your choice.
- click the **Person** drop-down arrow, and then click to select the **Person** of your choice.

3 Click the **Run Report** button.

4 To print the report, click the **Print Report** icon.

To view and print a crew roster

This report lists the names of individual crew members for a crew.

1 On the **Reports** menu, click **Crew Roster**.

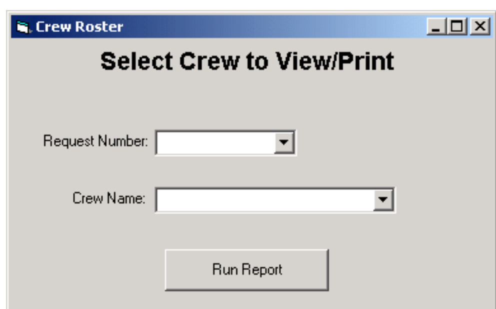
2 On the **Crew Roster** dialog box, perform one of the following

- click the **Request Number** drop-down arrow, and then click to select the **Request Number** of your choice
- click the **Crew Name** drop-down arrow, and then click to select the **Crew Name/Equipment** of your choice.

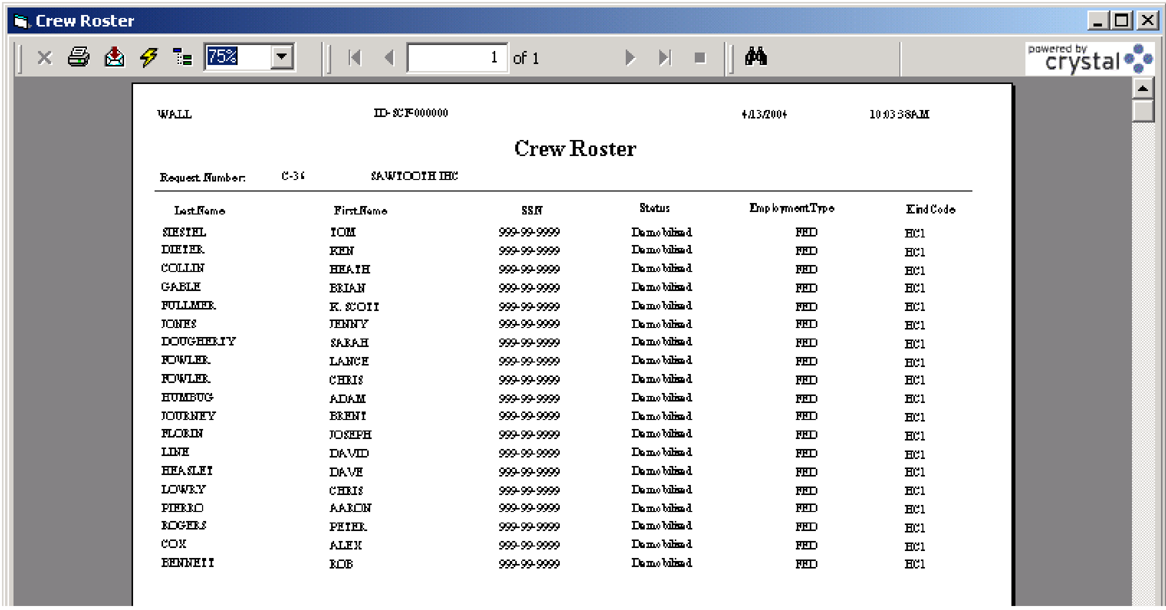
3 Click the **Run Report** button.

4 To print the report, click the **Print Report** icon.

The following diagram shows the Crew Roster dialog box.



The following diagram shows a sample Crew Roster as it appears on your screen.



WALL ID-SCF000000 4/13/2004 10:03:38AM

Crew Roster

Request Number: C-36 SAWTOOTH IHC

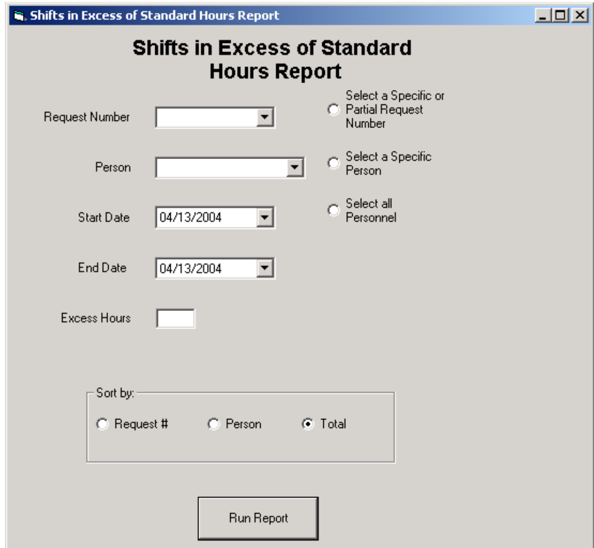
LastName	FirstName	SSN	Status	EmploymentType	KindCode
SIESTEL	TOM	999-99-9999	Demobilized	FED	HC1
DIETER	KEN	999-99-9999	Demobilized	FED	HC1
COLLIN	HEATH	999-99-9999	Demobilized	FED	HC1
GABLE	BRIAN	999-99-9999	Demobilized	FED	HC1
FULLMER	K. SCOTT	999-99-9999	Demobilized	FED	HC1
JONES	JENNY	999-99-9999	Demobilized	FED	HC1
DOUGHERTY	SARAH	999-99-9999	Demobilized	FED	HC1
FOWLER	LANCE	999-99-9999	Demobilized	FED	HC1
FOWLER	CHRIS	999-99-9999	Demobilized	FED	HC1
HUMBUG	ADAM	999-99-9999	Demobilized	FED	HC1
JOURNEY	BRENT	999-99-9999	Demobilized	FED	HC1
FLORIN	JOSEPH	999-99-9999	Demobilized	FED	HC1
LINE	DAVID	999-99-9999	Demobilized	FED	HC1
HEASLET	DAVE	999-99-9999	Demobilized	FED	HC1
LOWRY	CHRIS	999-99-9999	Demobilized	FED	HC1
PIERRO	AARON	999-99-9999	Demobilized	FED	HC1
ROGERS	PETER	999-99-9999	Demobilized	FED	HC1
COX	ALEX	999-99-9999	Demobilized	FED	HC1
BENNETT	ROB	999-99-9999	Demobilized	FED	HC1

To prepare a Shifts in Excess of Standard Hours report

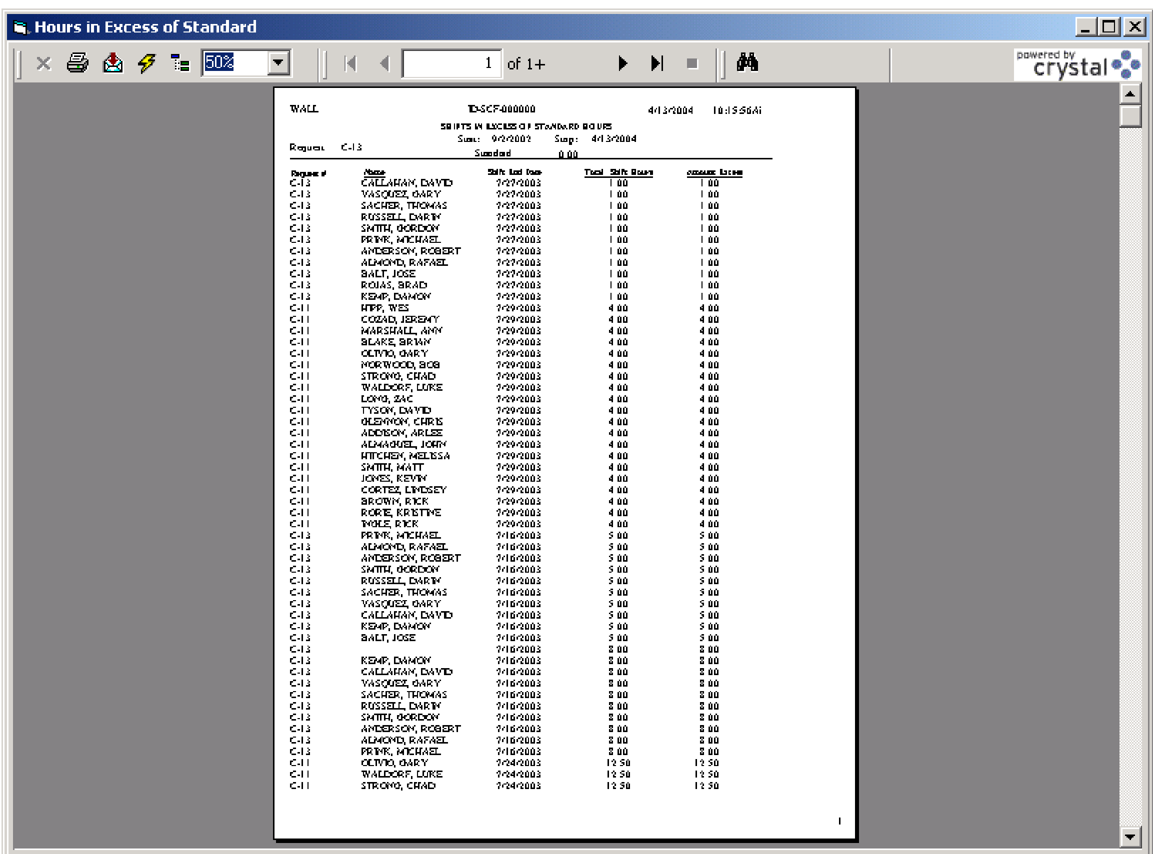
This report lists shifts that exceed standards and allows you to identify initial attack shifts and other shift issues that need documentation.

1. On the **Reports** menu, click **Shifts in Excess of Standard Hrs**.
2. On the **Shifts in Excess of Standard Hours Report** dialog box, perform one or more of the following as appropriate
   - click the **Request Number** drop-down arrow, and then click to select the **Request Number** of your choice
   - click the **Person** drop-down arrow, and then click to select the **Person** of your choice.
3. Click the **Start Date** drop-down arrow, and then click to select the **Start Date** of your choice.
4. Click the **End Date** drop-down arrow, and then click to select the **End Date** of your choice.
5. In the **Excess Hours** box, type the minimum total number of **Excess Hours** to be reported.
6. Under **Sort by**, click to select one of the following
   - Request #
   - Person
   - Total.
7. Click the **Run Report** button.
8. To print the report, click the **Print Report** icon.

The following diagram shows the Shifts in Excess of Standard Hours Report dialog box.



The following diagram shows a sample Shifts in Excess of Standard Hours report, as it appears on your screen.

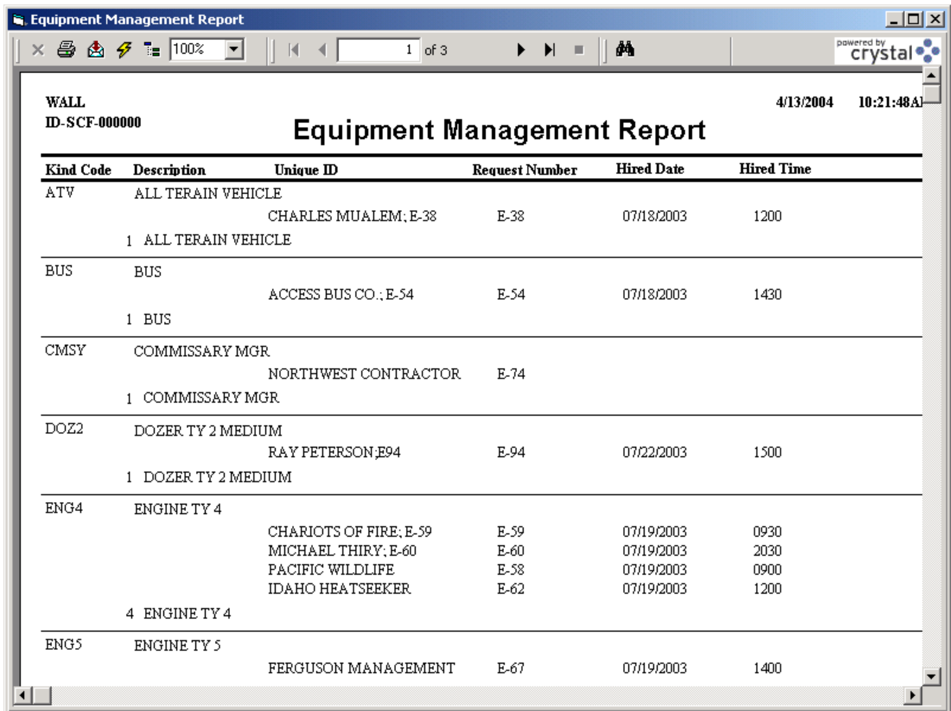


To view the Equipment Management Report

1 On the **Reports** menu, click **Equipment Management**.

2 To print the report, click the **Print Report** icon.

The following diagram shows a sample Equipment Management Report as it appears on your screen.


Equipment Management Report

100% 1 of 3

WALL
ID-SCF-000000

Equipment Management Report

4/13/2004 10:21:48AM

Kind Code	Description	Unique ID	Request Number	Hired Date	Hired Time
ATV	ALL TERAIN VEHICLE				
		CHARLES MUALEM; E-38	E-38	07/18/2003	1200
	1 ALL TERAIN VEHICLE				
BUS	BUS				
		ACCESS BUS CO.; E-54	E-54	07/18/2003	1430
	1 BUS				
CMSY	COMMISSARY MGR				
		NORTHWEST CONTRACTOR	E-74		
	1 COMMISSARY MGR				
DOZ2	DOZER TY 2 MEDIUM				
		RAY PETERSON;E94	E-94	07/22/2003	1500
	1 DOZER TY 2 MEDIUM				
ENG4	ENGINE TY 4				
		CHARIOTS OF FIRE; E-59	E-59	07/19/2003	0930
		MICHAEL THIRY; E-60	E-60	07/19/2003	2030
		PACIFIC WILDLIFE	E-58	07/19/2003	0900
		IDAHO HEATSEEKER	E-62	07/19/2003	1200
	4 ENGINE TY 4				
ENG5	ENGINE TY 5				
		FERGUSON MANAGEMENT	E-67	07/19/2003	1400

To view the Contractor Debits Report

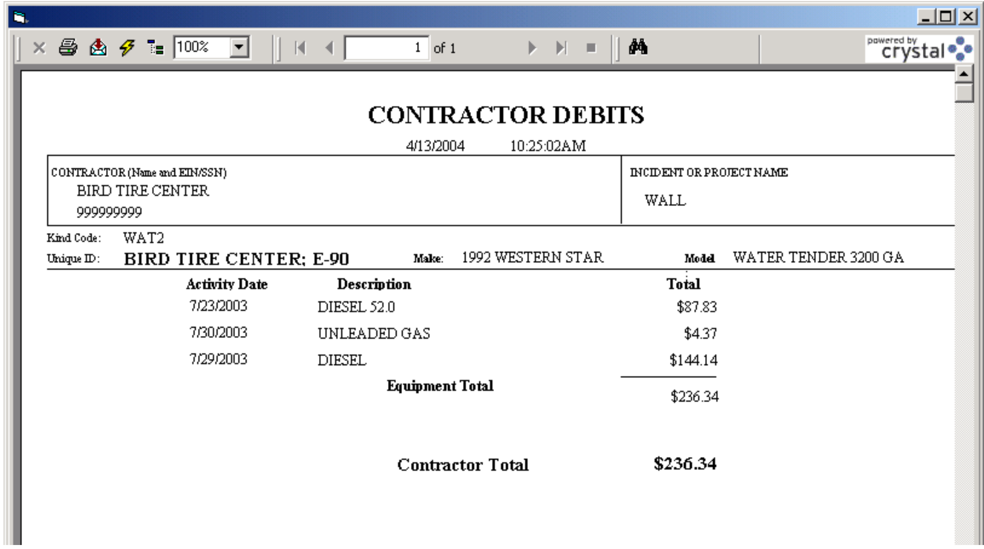
1 On the **Reports** menu, click **Contractor Debits**.

2 On the **Contractor Debits** dialog box, click the **Contractor** drop-down arrow, and then click to select the **Contractor** of your choice.

3 Click the **Run Report** button.

4 To print the report, click the **Print Report** icon.

The following diagram shows a sample Contractor Debits report as it appears on your screen.



To view the Payment Summary of Equipment report

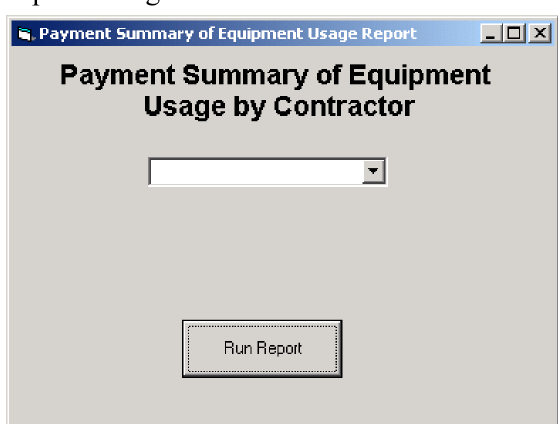
1 On the **Reports** menu, click **Payment Summary of Equipment**.

2 On the **Payment Summary of Equipment Usage Report** dialog box, click the drop-down arrow, and then click to select the **Contractor** of your choice.

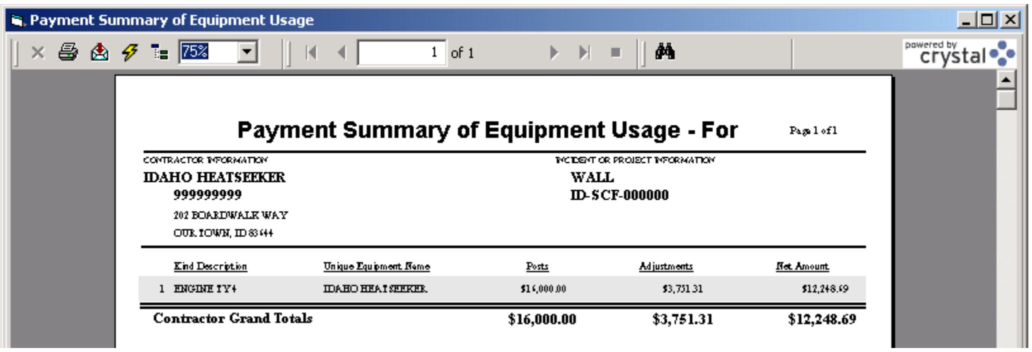
3 Click the **Run Report** button.

4 To print the report, click the **Print Report** icon.

The following diagram shows the Payment Summary of Equipment Usage Report dialog box.



The following diagram shows a sample Payment Summary of Equipment report as it appears on your screen.



To view the Summarization of Hours Worked report

1 On the **Reports** menu, click **Summary of Hours Worked**.

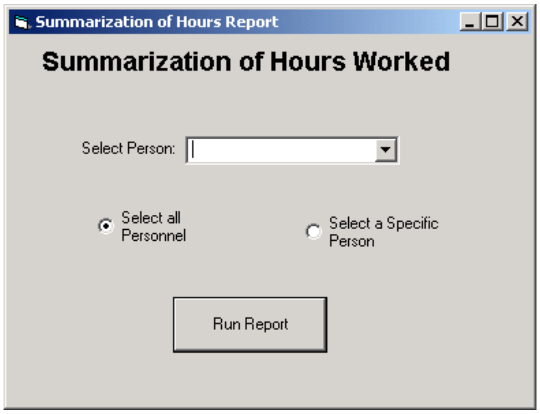
2 On the **Summarization of Hours Report** dialog box, perform one of the following

- to obtain information for an individual, click the **Select Person** drop-down arrow, and then click to select the **Person** of your choice.
- to obtain information for all personnel, click **Select All Personnel**.

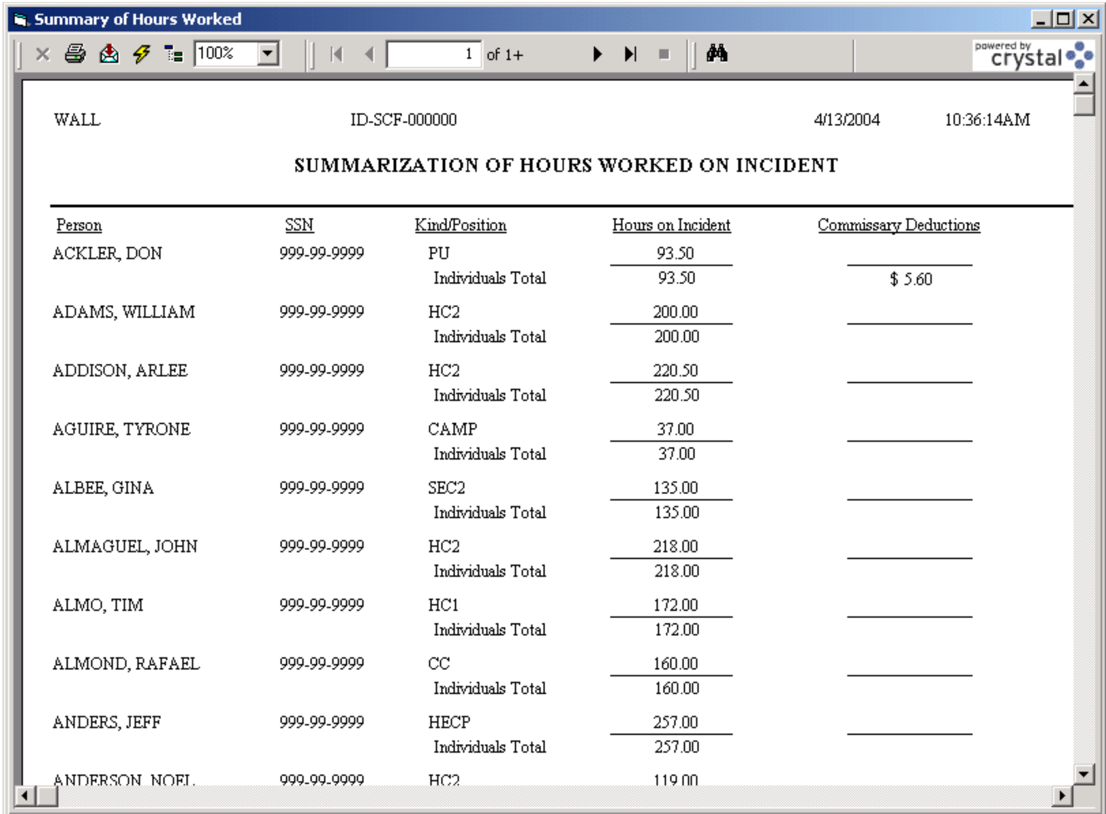
3 Click the **Run Report** button.

4 To print the report, click the **Print Report** icon.

The following diagram shows the Summarization of Hours Report dialog box.



The following diagram show a sample Summarization of Hours Worked on Incident report as it appears on your screen.



WALL ID-SCF-000000 4/13/2004 10:36:14AM

SUMMARIZATION OF HOURS WORKED ON INCIDENT

Person	SSN	Kind/Position	Hours on Incident	Commissary Deductions
ACKLER, DON	999-99-9999	PU	93.50	
		Individuals Total	93.50	$ 5.60
ADAMS, WILLIAM	999-99-9999	HC2	200.00	
		Individuals Total	200.00	
ADDISON, ARLEE	999-99-9999	HC2	220.50	
		Individuals Total	220.50	
AGUIRE, TYRONE	999-99-9999	CAMP	37.00	
		Individuals Total	37.00	
ALBEE, GINA	999-99-9999	SEC2	135.00	
		Individuals Total	135.00	
ALMAGUEL, JOHN	999-99-9999	HC2	218.00	
		Individuals Total	218.00	
ALMO, TIM	999-99-9999	HC1	172.00	
		Individuals Total	172.00	
ALMOND, RAFAEL	999-99-9999	CC	160.00	
		Individuals Total	160.00	
ANDERS, JEFF	999-99-9999	HECP	257.00	
		Individuals Total	257.00	
ANDERSON, NOEL	999-99-9999	HC2	119.00	

Performing searches for personnel or equipment

This section explains how to perform personnel and equipment searches and how to sort data elements by column heading.

Personnel and equipment searches are performed in the same manner. By performing a search, you can:

- query on one or more data elements
- find a resource and determine whether a name is connected to the wrong resource.

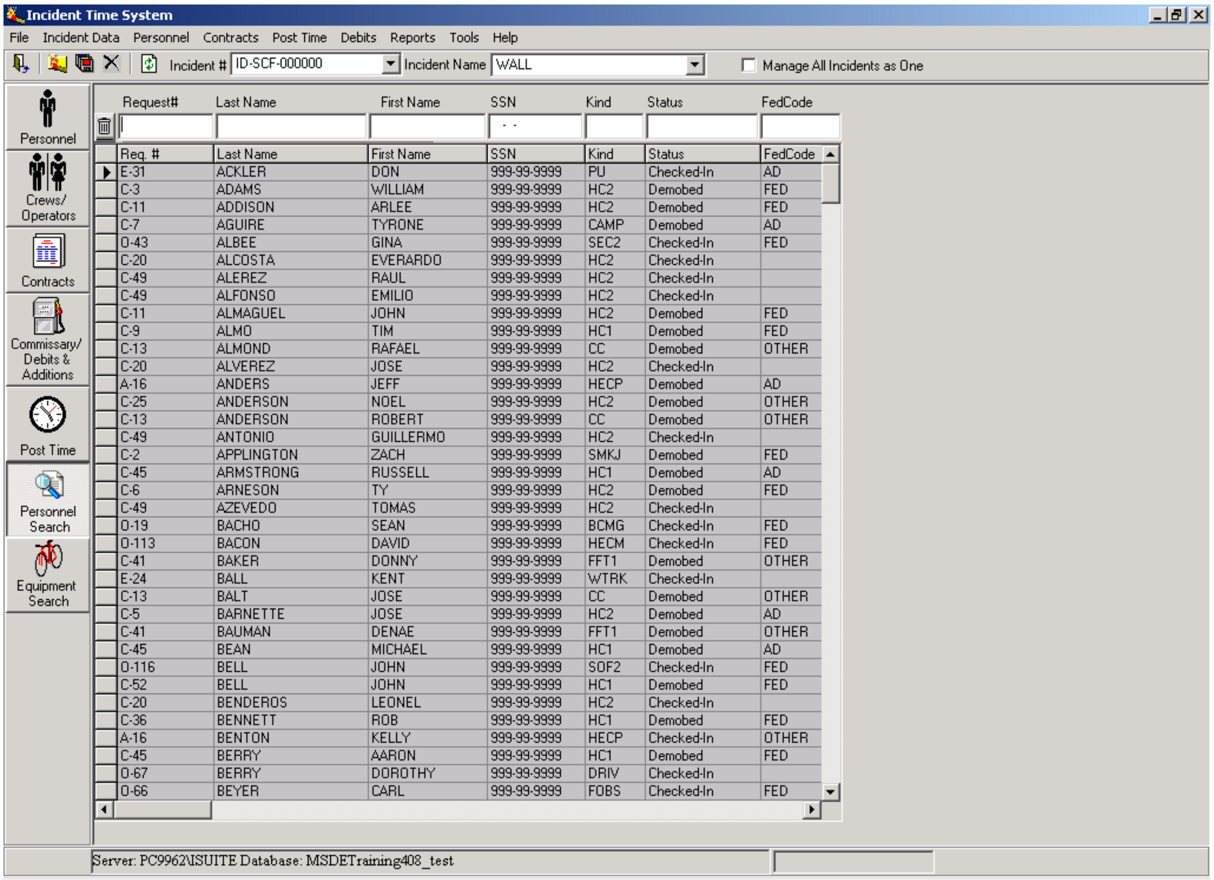
By using the sort feature in ITS, you can organize the data elements to suit your reporting needs.

To perform a personnel or equipment search

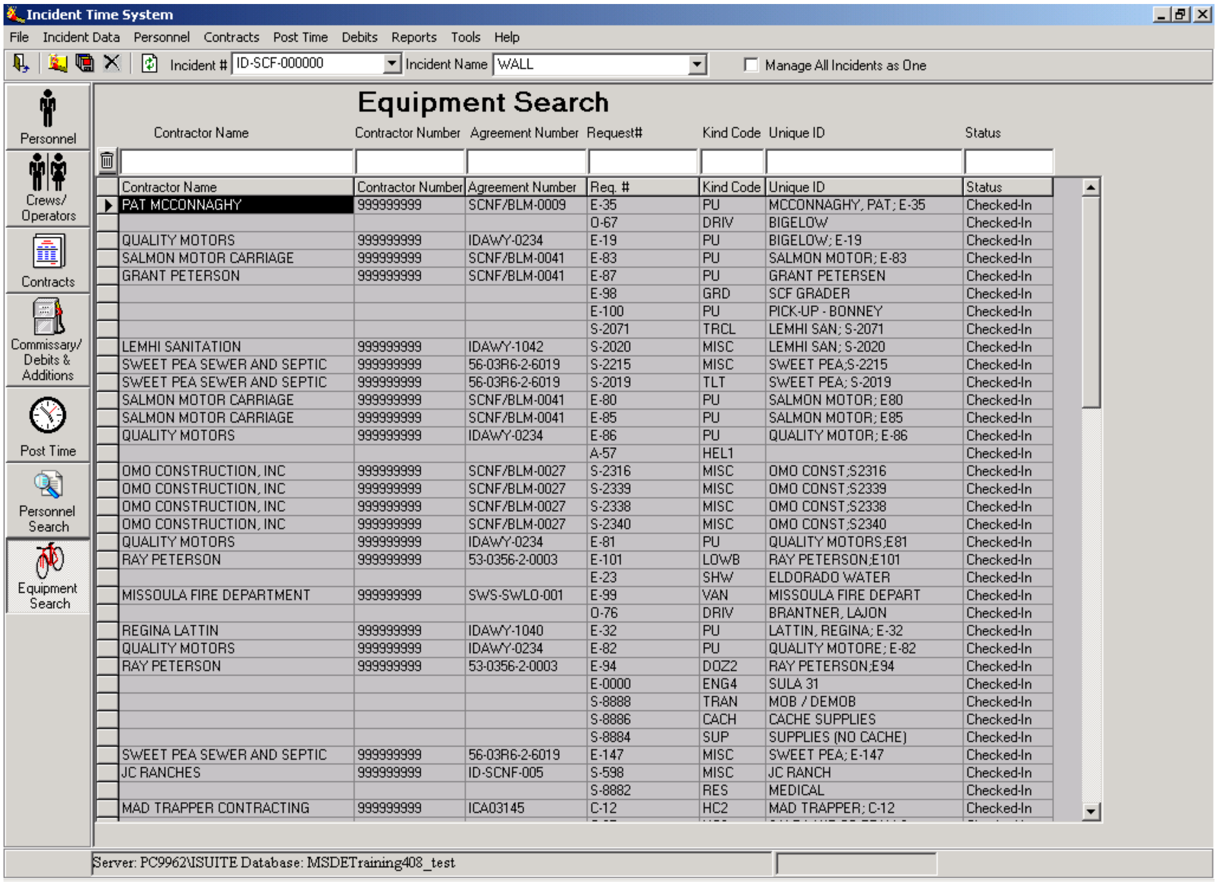
1. Click the **Personnel Search** button or the **Equipment Search** button.
2. Locate the column heading that identifies the data element for your search.

3 To narrow your search, click in the blank cell above the column heading of your choice, type the first several characters of the target data element, and then press TAB.

The following diagram shows the Personnel Search screen.



The following diagram shows the Equipment Search screen.



To sort data elements by column heading

1 Click the **Personnel Search** button or the **Equipment Search** button.

2 Locate the column heading that identifies the data element you want to sort, and then click that column heading title.

Putting it all together

This section explains some advanced topics you can perform in ITS, including how to:

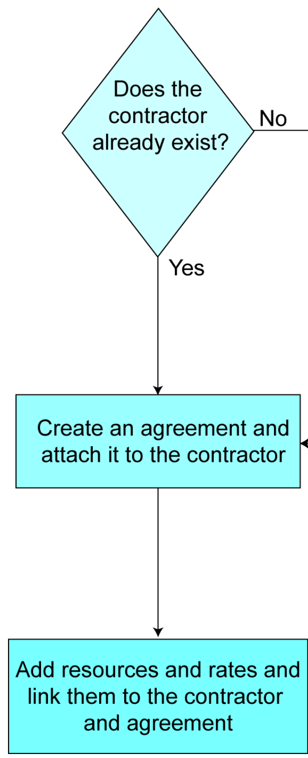
- manage contractor and agreement data from IRSS input
- work with the appropriate Unit of Measure (UOM) and coordinating with cost
- handle complicated contracts
- work with auditing functions for personnel and crew time, equipment time, and commissary time
- close out pay documents
- manage multiple incidents.

Managing contractor and agreement data from IRSS input

This section explains 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 to post time to contracted resources.

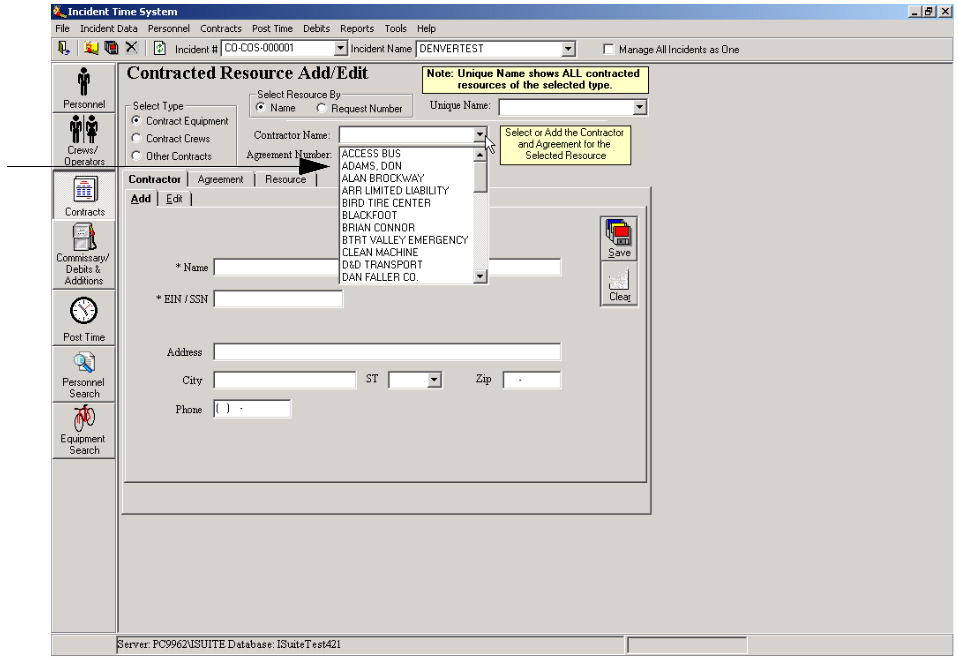
The following diagram outlines the basic process for working with contractor and agreement data.



To determine if the contractor already exists in the I-Suite database

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

The following diagram shows the Contracted Resource Add/Edit screen. The arrow points to the list of existing contractors in the I-Suite database.



To add a new contractor

Refer to the contract to add new contractor data. For more information about adding a contractor, see the previous section, "Working with contractor and agreement data."

---

1 Click the **Contracts** button.

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

3 Complete the following information as appropriate

- Name
- EIN/SSN
- Address
- City
- ST
- Zip
- Phone.

4 Click the **Save** button.

For an example of the Contracted Resource Add/Edit screen, see the previous section, "Working with contractor and agreement data."

To create an agreement and attach it to a contractor

Before creating the agreement, be sure the Contractor Name is displaying on the Contracted Resource Add./Edit screen.

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

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

3 Complete the following information

- Agreement Number
- Begin Date
- Expiration Date
- Point of Hire
- Administrative Office for Payment.

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

5 Click the **Save** button.

For an example of the Contracted Resource Add/Edit screen, see the previous section, "Working with contractor and agreement data."

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

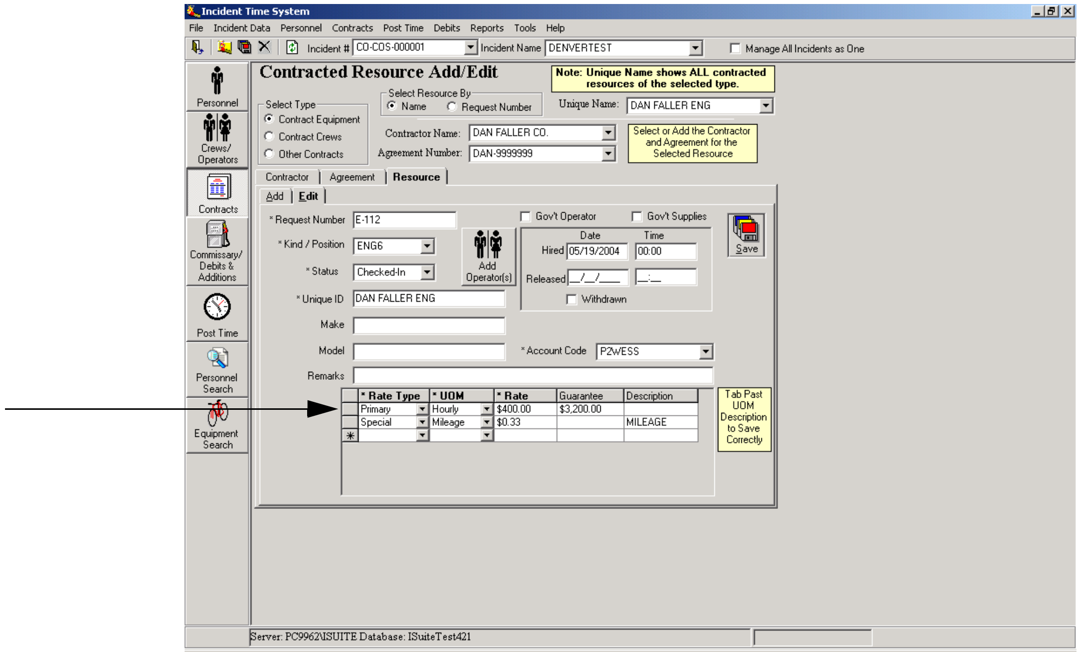
1. On the **Contracted Resource Add/Edit** screen under **Select Resource By**, click **Name** or **Request Number**.
2. Click the **Unique Name** or **Request Number** drop-down arrow, and then click to select the **Name** or **Request Number** of your choice.
3. Complete the **Contractor Name** and **Agreement Number** boxes for the **Contractor/Agreement** of your choice.
4. On the **Resource** tab on the **Edit** tab, complete the following information
   - in the **Unique ID** box, create a unique name for the resource
   - complete the **Make**, **Model**, and **Remarks** boxes, as appropriate
   - click to select the **Gov't Operator** and **Gov't Supplies** check boxes, as appropriate
   - complete the **Hired Date** and **Time** boxes and the **Released Date** and **Time** boxes, as appropriate
   - click to select the **Withdrawn** check box, as appropriate
   - click the **Rate Type** drop-down arrow, and then click to select the **Rate Type** of your choice
   - click the **UOM** drop-down arrow, and then click to select the **Unit of Measure** of your choice.
   - click in the **Rate** box, and then type the appropriate **Rate** for that **Rate Type** and **Unit of Measure**.
   - press TAB twice to advance the cursor to the next **Rate Type** box.

Remember to add all primary rates, and use special rates for mileage.

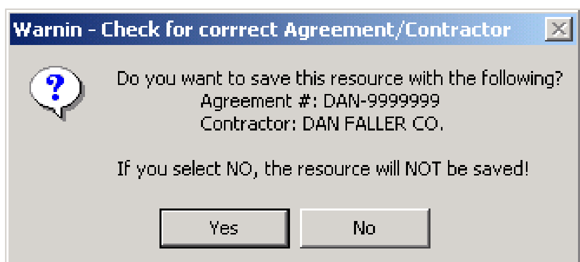
Be sure to press TAB to advance the cursor to the next blank row!

5. Verify that the correct **Request Number**, **Contractor Name**, and **Agreement Number** display on the upper portion of the **Contracted Resource Add/Edit** screen.
6. Click the **Save** button.
7. On the **Warning - Check for Agreement/Contractor** dialog box, click **Yes**.

The following diagram shows the Contracted Resource Add/Edit screen. The arrow points to the Primary and Special Rate Types.



The following diagram shows the Warning - Check for Agreement/Contractor dialog box.



Understanding rate types and Units of Measure

Remember these key points when working with rate types and Units of Measure (UOM):

- All contracted resources must have a primary rate designation.
- A contracted resource may or may not have one to five special rate designations.
- Units of Measure include Daily, Each, Hourly, and Mileage.
- Be sure to match the correct rate type with the correct UOM.

Posting time for contracted resources

This section explains how to post time for contracted resources using the appropriate primary and secondary rates, and how to print the OF-286.

To post time for contracted resources

1. Click the **Post Time** button, and then click the **Contract Equipment, Crews and Other** tab.
2. Under **Select Type**, select the equipment type of your choice.
3. Click the **Contractor Name** drop-down arrow, and then click to select the **Contractor Name** of your choice.
4. Perform one of the following
   - Click the **Equipment Unique ID** drop-down arrow, and then click to select the **Equipment** of your choice.
   - Click the **Request Number** drop-down arrow, and then click to select the **Request Number** of your choice.
5. Click the **Account Code** drop-down arrow, and then click to select the **Account Code** of your choice.
6. Under **Post Options**, click to select the **Rate Type** of your choice.
7. If one-half rate applies, click to select the **1/2 Rate** check box.
8. Post the required information as appropriate for that **Rate Type** and **Unit of Measure**.
9. To commit the posting, click the **Commit Posting** button.

Once you have correctly posted the time for the resources, you can print the OF-286.

To print the OF-286

*You can also print the OF-286 by clicking the **Print OF-286** button on the **Incident Post-Posting Equipment** screen.*

Once you create an original invoice, you cannot edit it.

1. On the **Reports** menu, click **OF-286 w/ Deductions**.
2. On the **OF-286** dialog box under **Select Type**, click to select the **equipment type** of your choice.
3. Click the **Contractor** drop-down arrow, and then click to select the **Contractor Name** of your choice.
4. Click the **Agreement** drop-down arrow, and then click to select the **Agreement** of your choice.
5. Click the **Equipment** drop-down arrow, and then click to select the **Equipment** of your choice.

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

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

- OF-286 with Itemized Deductions
- OF-286 Only
- Itemized Deductions Only.

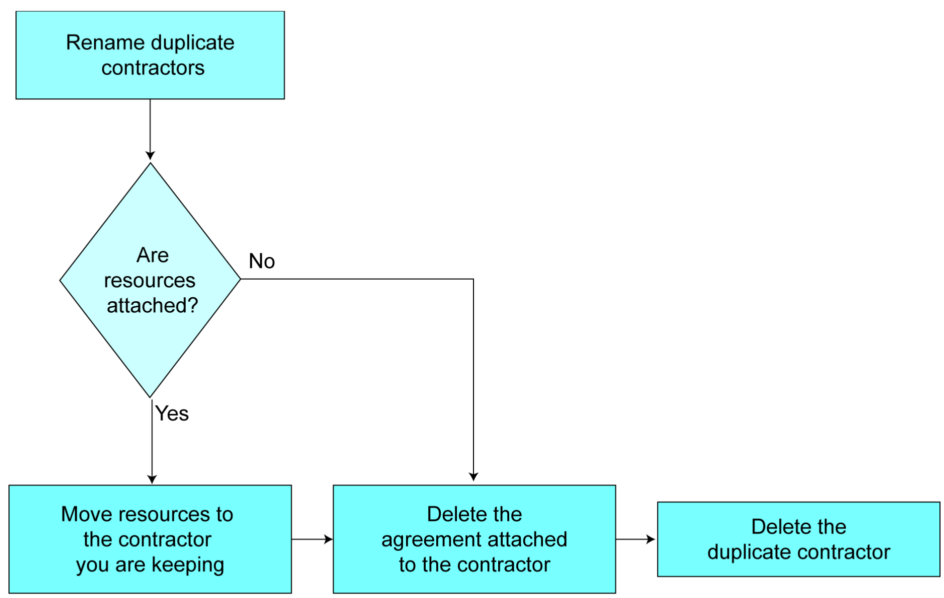
8 To preview and then print the report, click the **Preview/Print Report** button, and then click the **Print Report** icon.

Deleting a duplicate contractor

You may find that a contractor was entered in ITS twice. This duplicate resource may or may not have attached resources.

You cannot delete a contractor with attached resources and/or an agreement.

The following diagram outlines the basic process for deleting a duplicate contractor.

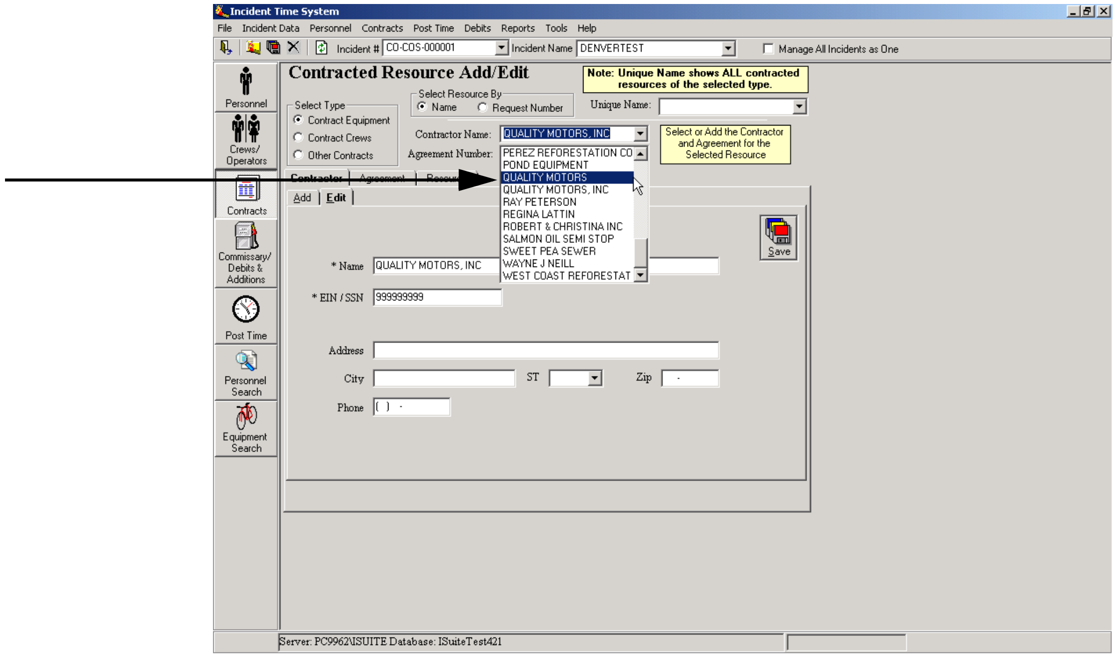


To locate duplicate contractors

1 Click the **Contracts** button.

2 Click the **Contractor Name** drop-down arrow, and then locate the duplicate **Contractor Names**.

The following diagram shows the Contracted Resource Add/Edit screen. The arrow points to two duplicate contractors.



To rename duplicate contractors

1. On the **Contracted Resource Add/Edit** screen, on the **Contractor** tab, click the **Edit** tab.
2. Click the **Contractor Name** drop-down arrow, and then click to select the first duplicate **Contractor Name** you want to rename.
3. In the **Name** box, edit the **Contractor Name**, and then click the **Save** button.

   For example, insert the number "1" to the end of the first duplicate contractor name.

4. On the **Edit** tab, click the **Contractor Name** drop-down arrow, and then click to select the second duplicate **Contractor Name**.
5. In the **Name** box, edit the **Contractor Name**, and then click the **Save** button.

   For example, insert the number "2" to the end of the second duplicate contractor name.

To determine if the duplicate contrator has attached resources

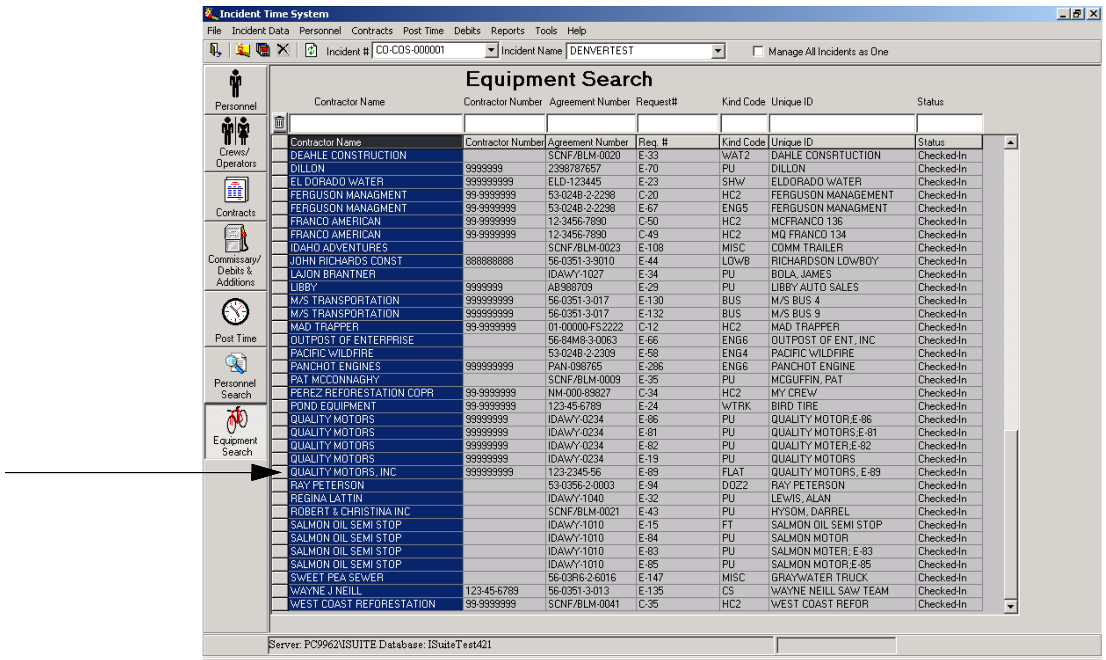
1. Click the **Equipment Search** button.

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

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

*If the Contractor Name is listed on the **Equipment Search** screen, it has attached resources. If one of the duplicate contractors does not appear on the **Equipment Search** screen, then it does not have attached resources.*

The following diagram shows an example of the Equipment Search screen. The arrow points to the contractor, "Quality Motors, Inc"



Contractor Name	Contractor Number	Agreement Number	Req. #	Kind Code	Unique ID	Status
DEAHLE CONSTRUCTION		SCNF/BLM-0020	E-33	WAT2	DAHLE CONSRTUCTION	Checked-In
DILLON	9999999	2398787657	E-70	PU	DILLON	Checked-In
EL DORADO WATER	999999999	ELD-123445	E-23	SHW	ELDORADO WATER	Checked-In
FERGUSON MANAGMENT	99-9999999	53-024B-2-2298	C-20	HC2	FERGUSON MANAGEMENT	Checked-In
FERGUSON MANAGMENT	99-9999999	53-024B-2-2298	E-67	ENG5	FERGUSON MANAGMENT	Checked-In
FRANCO AMERICAN	99-9999999	12-3456-7890	C-50	HC2	MCFRANCO 136	Checked-In
FRANCO AMERICAN	99-9999999	12-3456-7890	C-49	HC2	MQ FRANCO 134	Checked-In
IDAHO ADVENTURES		SCNF/BLM-0023	E-108	MISC	COMM TRAILER	Checked-In
JOHN RICHARDS CONST	888888888	56-0351-3-9010	E-44	LOWB	RICHARDSON LOWBOY	Checked-In
LAJON BRANTNER		IDAWY-1027	E-34	PU	BOLA, JAMES	Checked-In
LIBBY	9999999	AB988709	E-29	PU	LIBBY AUTO SALES	Checked-In
M/S TRANSPORTATION	999999999	56-0351-3-017	E-130	BUS	M/S BUS 4	Checked-In
M/S TRANSPORTATION	999999999	56-0351-3-017	E-132	BUS	M/S BUS 9	Checked-In
MAD TRAPPER	99-9999999	01-00000-FS2222	C-12	HC2	MAD TRAPPER	Checked-In
OUTPOST OF ENTERPRISE		56-84M8-3-0063	E-66	ENG6	OUTPOST OF ENT, INC	Checked-In
PACIFIC WILDFIRE		53-024B-2-2309	E-58	ENG4	PACIFIC WILDFIRE	Checked-In
PANCHOT ENGINES	999999999	PAN-098765	E-286	ENG6	PANCHOT ENGINE	Checked-In
PAT MCCONNAGHY		SCNF/BLM-0009	E-35	PU	MCGUFFIN, PAT	Checked-In
PEREZ REFORESTATION COPR	99-9999999	NM-000-89827	C-34	HC2	MY CREW	Checked-In
POND EQUIPMENT	99-9999999	123-45-6789	E-24	WTRK	BIRD TIRE	Checked-In
QUALITY MOTORS	99999999	IDAWY-0234	E-86	PU	QUALITY MOTOR;E-86	Checked-In
QUALITY MOTORS	99999999	IDAWY-0234	E-81	PU	QUALITY MOTORS;E-81	Checked-In
QUALITY MOTORS	99999999	IDAWY-0234	E-82	PU	QUALITY MOTER;E-82	Checked-In
QUALITY MOTORS	99999999	IDAWY-0234	E-19	PU	QUALITY MOTORS	Checked-In
QUALITY MOTORS, INC	999999999	123-2345-56	E-89	FLAT	QUALITY MOTORS, E-89	Checked-In
RAY PETERSON		53-0356-2-0003	E-94	DOZ2	RAY PETERSON	Checked-In
REGINA LATTIN		IDAWY-1040	E-32	PU	LEWIS, ALAN	Checked-In
ROBERT & CHRISTINA INC		SCNF/BLM-0021	E-43	PU	HYSOM, DARREL	Checked-In
SALMON OIL SEMI STOP		IDAWY-1010	E-15	FT	SALMON OIL SEMI STOP	Checked-In
SALMON OIL SEMI STOP		IDAWY-1010	E-84	PU	SALMON MOTOR	Checked-In
SALMON OIL SEMI STOP		IDAWY-1010	E-83	PU	SALMON MOTER; E-83	Checked-In
SALMON OIL SEMI STOP		IDAWY-1010	E-85	PU	SALMON MOTOR;E-85	Checked-In
SWEET PEA SEWER		56-03R6-2-6016	E-147	MISC	GRAYWATER TRUCK	Checked-In
WAYNE J NEILL	123-45-6789	56-0351-3-013	E-135	CS	WAYNE NEILL SAW TEAM	Checked-In
WEST COAST REFORESTATION	99-9999999	SCNF/BLM-0041	C-35	HC2	WEST COAST REFOR	Checked-In

Quality Motors and Quality Motors, Inc are duplicate contractors. Since both contractors show up on the Equipment Search screen, they both have attached resources.

To move attached resources from one contractor to another

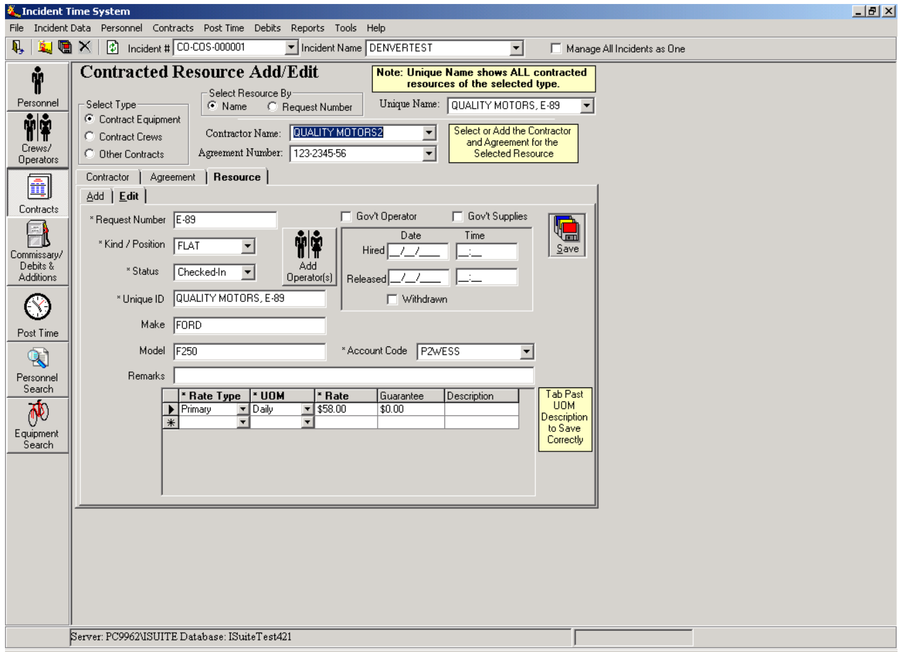
1 Click the **Contracts** button.

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

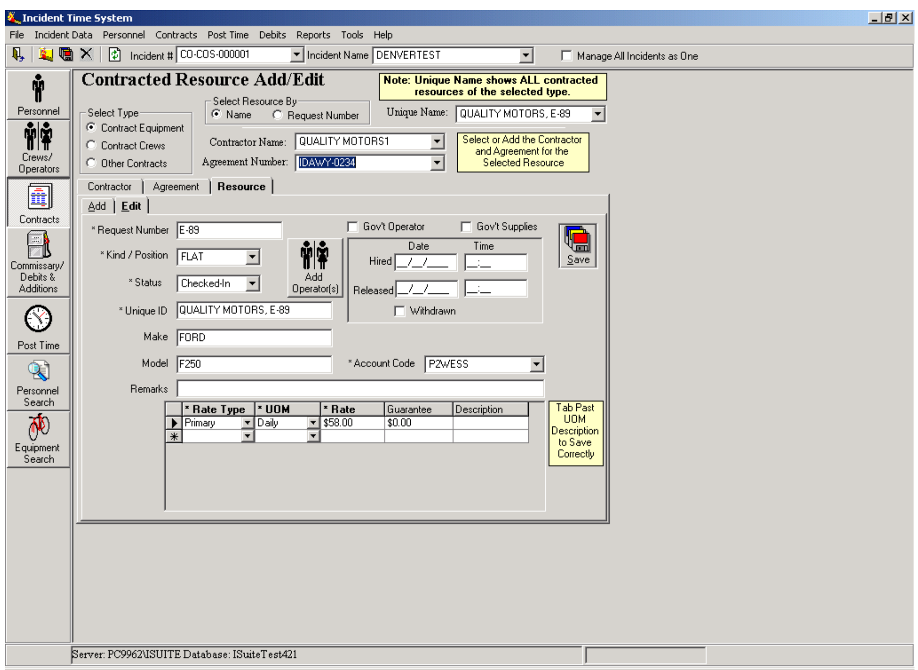
3 Click to select the **target Contractor Name** and **Agreement Number** for the resource to be moved, and then click the **Save** button.

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

The following diagram shows the Contracted Resource Add/Edit screen. The resource, "E-89" is currently attached to QUALITY MOTORS2.



The following diagram shows the same resource, "E-89" moved to QUALITY MOTORS1.

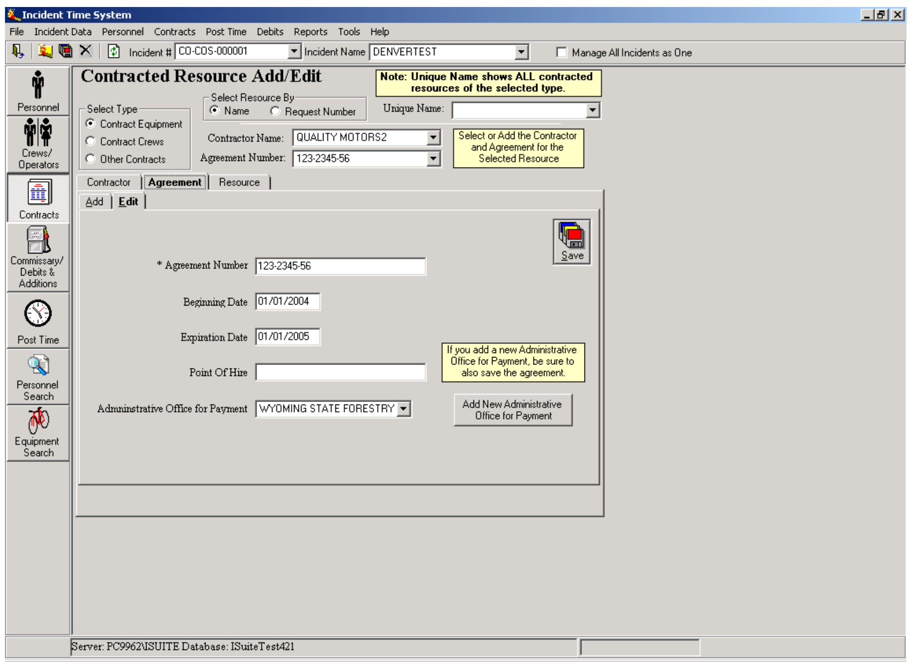


To delete a duplicate contractor with no attached resources

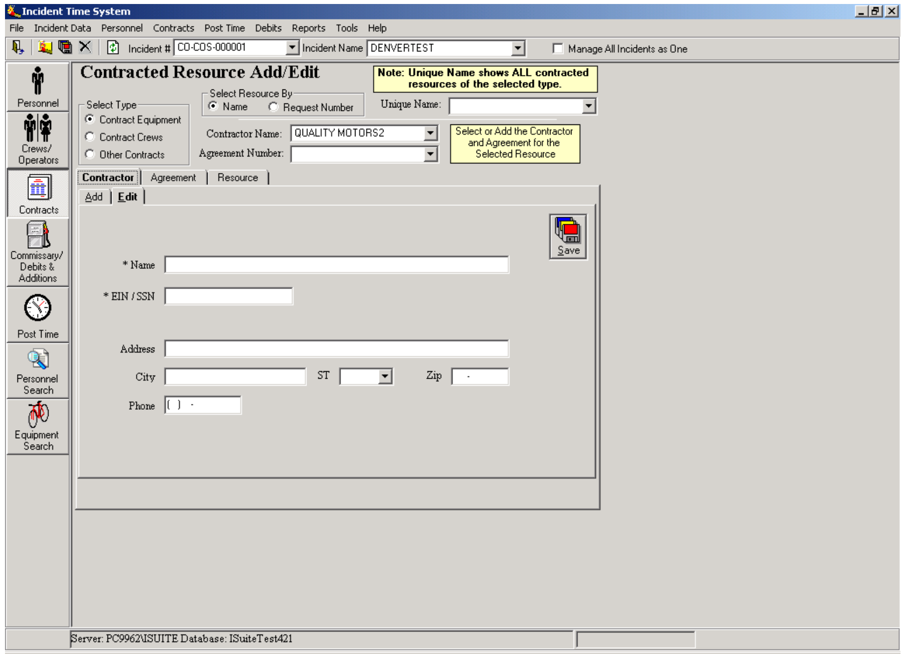
You must first delete the agreement before you can delete the contractor.

1. Click the **Contracts** button.
2. Click the **Agreement Number** drop-down arrow, click to select the appropriate **Agreement Number**, and then click the **Delete** button.
3. Click the **Contractor Name** drop-down arrow, click to select the **Contractor Name** you want to delete, and then click the **Delete** button.
4. To verify that you deleted the duplicate contractor, click the **Refresh** button.

The following diagram shows the agreement to be deleted from QUALITY MOTORS2.



The following diagram shows the agreement deleted from QUALITY MOTORS2.



Working with partial payments

This section explains how to post a partial payment for a firefighter or to a contractor.

Be sure to notify cost personnel about the partial payment!

To post a partial payment for a firefighter

Contact the responsible hiring agency for processing procedures if you need to post a partial payment for an OF-288.

To post a partial payment to a contractor

After printing the Original invoice, you can send it to the payment center for payment.

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

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

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

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

Once you create an original invoice, you cannot edit it.

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

To delete a previous invoice for payment to a contractor

Do not recreate an invoice if one has already been sent to the payment center. Use this option only if the previous invoice has not been sent to the payment center.

If creating the final invoice, set the release date and time, so that the information will be carried over to the resource edit screen for equipment.

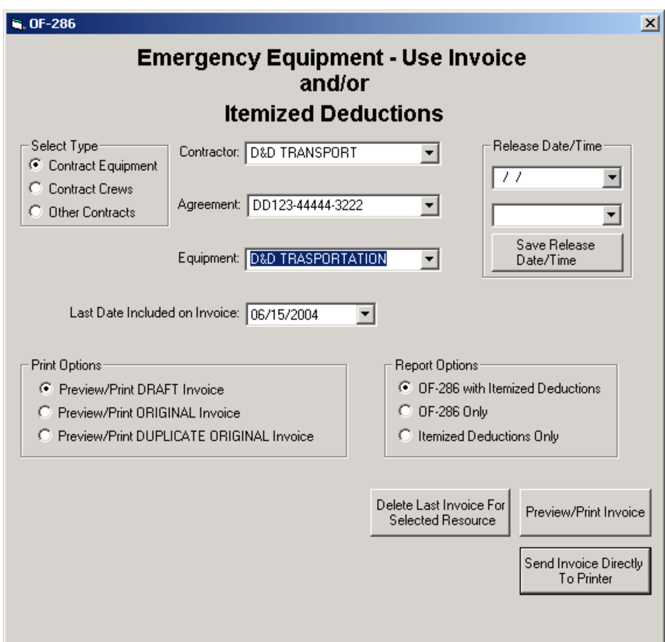
1 On the **Reports** menu, click **OF-286**.

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

3 Click the **Delete Last Invoice For Selected Resource** button.

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

The following diagram shows the OF-286 dialog box.



The following diagram shows the Warning dialog box.