UNIT - 10

I-Suite Supply

5/3/2013

This Training Manual is for use with the 13.01.00 version of the I-Suite System.

TOTAL SUGGESTED TIME: 5 hours

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<u>DETAILED LESSON OUTLINE</u>

COURSE: I-Suite

UNIT: 10.0 - Supply Overview

SUGGESTED TIME: 20 minutes

TRAINING AIDS: Computer projector, screen, computer
                                     (one for instructor and one per
                                     trainee).

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

        1. Identify the purpose of the
           Supply module.

        2. Identify the basic features of
           the Supply screen.

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INTRODUCE THE UNIT

PRESENT OBJECTIVES

I. SUPPLY

   A. Identify the purpose of the Supply Module:

      1. The primary purpose of the Supply module is to track supply items that are issued to resources and returned to Supply.

      2. The Supply module can also be used to track the Supply Inventory.

   NOTE: Inventory Tracking is optional. When using the Supply module to track the **Supply Inventory**, it is a good idea to receive supply items in order to ensure accurate counts.

   B. Identify the basic features of the Supply window:

EXPLAIN THE BASIC FEATURES OF THE SUPPLY WINDOW AND CONDUCT A QUICK, UNINTERRUPTED WALK-THROUGH OF THE MENU AND TOOLBAR BUTTONS.

DO NOT FIELD STUDENT QUESTIONS DURING THE WALK-THROUGH (HAVE STUDENTS SAVE THEIR QUESTIONS FOR THE LECTURE).

      1. The **Supply** drop-down menu at the top of the window includes the following **Supply** options:

         a. **Release (Permanent)** - Permanently releases supply items to another location, such as a cache or another incident.

         b. **Add/Edit Location** - Adds or edits a location.

         c. **Add/Edit Supply Items** - Adds or edits a Supply item.

         d. **Transfer (At Incident)** - Transfers a Supply item from one resource to another.

         e. **Inventory** - Allows the user to manually change inventory counts.

      2. The **Supply** toolbar is located to the right of the **Filter** toolbar. The buttons in this toolbar include:

         a. **Issue** - Issue supply items.

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b. **Issue Returns** - Return supplies issued to a resource or location.

c. **Receive** - Receive supply items.

d. **View History** - View a history of supply items that were issued.

e. **Add/Edit Location** - Add or edit locations that are either internal or external to the incident.

f. **Add Supply Item** - Add items to the Supply list.

3. Each window in the Supply module contains two to three grid areas. The following grids may display on the screen, depending on the Supply area that is open:

    a. Resources Grid

    b. Locations Grid

    c. Supply Items Grid

    d. Items for Transfer Grid

    e. Items Issued Grid

    f. Items Received Grid

    g. Items Released Grid

    h. Items Transferred Grid

4. Additional Supply buttons display on the right side of the window. The buttons that display are based on the area that is open within the Supply module.

COURSE: I-Suite

UNIT: 10.1 - Supply Options

SUGGESTED TIME: 10 minutes

TRAINING AIDS: Computer projector, screen, computer
                                     (one for instructor and one per
                                     trainee).

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

1. Select the incident to which the Supply option apply.

2. Define the Supply Address.

3. Turn Inventory Tracking ON or OFF.

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INTRODUCE THE UNIT.

PRESENT UNIT OBJECTIVES.

I.   SUPPLY OPTIONS

   A. Define Incident for Supply

   B. Define Supply Address

   C. Turn Track Inventory On or Off

II.   SUPPLY INCIDENT

   A. To define the Supply Incident:

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

      2. Click the **Supply** tab.

      3. From the **Incident** drop-down list, select the incident to which the supply options apply.

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

III.   SUPPLY ADDRESS

   A. To define the Supply Address:

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

      2. Click the **Supply** tab.

      3. Under **Supply Address**, enter the supply address, including **Address 1**, **Address 2**, **City**, **State**, and **Zip Code**.

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

IV.   TRACK INVENTORY

   A. To turn Track Inventory ON or OFF:

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

      2. Click the **Supply** Tab.

      3. If you want to track the supply inventory, click to check the **Track Inventory** checkbox.

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If Track Inventory is ON and you want to turn it OFF, click to uncheck the **Track Inventory** checkbox.	
4. When finished, click the **Save** button to save your changes. Then click the **OK** button to close the **Options** window.	
REVIEW UNIT OBJECTIVES.	◄———**Instructor Comment**

<p style="text-align:center;">DETAILED LESSON OUTLINE</p>

COURSE:	I-Suite
UNIT:	10.2 - Supply Issue
SUGGESTED TIME:	30 minutes
TRAINING AIDS:	Computer projector, screen, computer (one for instructor and one per trainee).
OBJECTIVES:	Upon completion of this unit, the trainee will be able to:

1. Identify Supply Items to issue to a Resource or Location.

2. Perform an Advanced Search for a Supply Item.

3. Remove or Change the Quantity for a Supply Item.

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INTRODUCE THE UNIT.

PRESENT UNIT OBJECTIVES.

I.   ISSUE SUPPLIES

    A. Issue Supply Items to a Resource or Location.

    B. Perform an Advanced Search for a Supply Item.

    C. Remove or Change the Quantity for a Supply Item.

II. ISSUE SUPPLY ITEMS

    A. To use the **Select Item** button to select Supplies to issue to a Resource or Location:

       1. From the **Modules** drop-down menu select the **Supply** option.

          OR

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

       2. To issue a Supply Item to a resource, click the **Resource** in the **Resources** grid.

          OR

          To issue a Supply Item to a resource and a location, click a **Resource** in the **Resources** grid. Then select the location from the **Location** drop-down list.

          OR

          To issue a Supply Item to a location, click the **UnSelect Resource** button. Then select the location from the **Location** drop-down list.

NOTE: If your team is part of the **Supply Pilot**, you can scan a resource's incident card to select that resource when issuing supplies.

       3. In the **Items for Issue** grid, click the **Supply Item** you want to issue to the Resource or Location.

       4. Click the **Select Item** button.

       5. When the **Issue Item(s)** window displays, enter the quantity of the items being issued in the **Quantity**

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to Issue box.

6. Click the **Save** button. The item displays in the **Items Issued** grid at the bottom of the window.

7. To add another supply item to the **Items Issued** grid, repeat steps 3 - 6.

NOTE: You can only issue items to one **Resource** or **Location** at a time.

◄— **Read Note**

NOTE: If your team is part of the **Supply Pilot**, you can scan either the bar code for the item in the **Smart Book** or the **NFES Bar Code** on the item. When you scan the bar code, the system automatically displays the item in the **Items Issued** grid on the screen. If there are multiple quantities you are issuing, scan the bar code multiple times to increase the quantity amount.

◄— **Read Note**

8. When all items to be issued to the resource or location are in the **Items Issued** grid, click the **Save Item(s)** button to issue the items.

NOTE: If one or more of the items had a **Property Number** defined, a **Waybill** for the item displays in a **Preview** window. Click the **Print Report** button to print the Waybill. If the **Waybill** does not display, click the **Preview/Print Waybill** button.

◄— **Read Note**

B. To use the **Quick Issue** button to issue Supply Items:

1. From the **Modules** drop-down menu select the **Supply** option

OR

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

2. Select the **Resource** or **Location** to **Issue To**.

3. Click the **Quick Issue** button to open the Quick Issue Item(s) window.

4. In the **NFES # to Issue** box, enter the appropriate **NFES** number.

5. If you are issuing more than one supply item with the same **NFES** number, click to check the **Do not clear NFES #** checkbox. This leaves the **NFES** number in the **NFES#** box after you click the **Save**

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button.

6. If applicable, select a property number for the item from the **Property Number** drop-down list.

7. Enter the **Quantity to Issue**.

NOTE: If you selected a **Property Number**, the **Quantity to Issue** can only be **1**.

◄──**Read Note**

8. Enter any comments about the item being issued in the **Remarks** box.

9. Click the **Save** button to save the items to the **Item Issued** grid.

NOTE: The **Quick Issue Item(s)** window remains open after you save the new item count. This enables you to quickly issue another item.

◄──**Read Note**

10. To enter additional items, repeat the steps 4 - 9.

11. After all of the items have been added to the **Item Issued** grid, click the **Cancel** button, to close the **Quick Issue Item(s)** window.

12. To finish issuing, click the **Save Item(s)** button next to the **Items Issued** grid.

III. ADVANCED SEARCH

A. To perform an Advanced Search in the Supply Items grid:

1. In the **Advanced Search** box on the right side of the window, enter the term for which you want to search.

2. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in either the name or the description. For example, if you entered **AXE** as your search term, only those items with AXE in the name or description would display in the grid.

3. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

IV. REMOVE/CHANGE ISSUE

A. To remove or change the quantity of an item on the **Items Issued** grid:

1. In the **Items Issued** grid, click to select the item you

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want to remove or change.

2. Then click the **Remove/Change Issue** button. A **Remove Item(s)** window displays.

3. In the **Correct quantity to Issue** box, enter the quantity of the item to issue.

NOTE: To remove the item from the **Item Issued** grid, enter **0** (zero) in the **Correct quantity to Issue** box.
← **Read Note**

4. Click the **Save** button to change the quantity or remove the item.

NOTE: To remove all items from the Items Issued grid, click the **Clear Issue** button.
← **Read Note**

REVIEW UNIT OBJECTIVES.
← **Instructor Comment**

DETAILED LESSON OUTLINE

COURSE: I-Suite

UNIT: 10.3 - Supply Issue Returns

SUGGESTED TIME: 30 minutes
TRAINING AIDS: Computer projector, screen, computer
                                 (one for instructor and one per
                                 trainee).

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

                                 1. Filter Supply Items that are
                                     Listed

                                 2. Perform an Advanced Search

                                 3. Return Supply Items

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INTRODUCE THE UNIT.

PRESENT UNIT OBJECTIVES.

I. ISSUE RETURNS

   A. Filter listed Supply Items.

   B. Perform an Advanced Search

   C. Return Supply Items

II. FILTER SUPPLY ITEMS

   A. To identify the Supply Items to display in the Items Issued grid:

      1. To display items issued to a location only, click the **List Items For All Locations Without A Resource** button.

      2. To display items issued to a specific resource, click a resource in the **Resources** grid at the top of the window.

NOTE: If your team is part of the Supply Pilot, you can scan a resource's incident card to select that resource when returning supplies. ←**Read Note**

      3. To display items issued to a specific location, select the location from the **Location** drop-down list.

      4. To display items currently issued to a resource, location, or both, click the **All Items Issued** button.

NOTE: The **All Items Issued** button displays all items currently issued. ←**Read Note**

      4. To display all supply items regardless of whether they were issued, click the **Return by Item** button.

NOTE: Use the **Return by Item** feature to return items that may not have been issued using I-Suite. ←**Read Note**

III. ADVANCED SEARCH

   A. To perform an Advanced Search in the Items Issued grid:

      1. Select a location from the **Location** drop-down list.

NOTE: The **Advanced Search** option searches for a supply item issued to the location selected in the **Location** box, regardless of the other filters selected. A location must be ←**Read Note**

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selected to perform an **Advanced Search** in **Issue Returns**. If the item you want to find was not issued to a location, select the **Blank** location option.

2. In the **Advanced Search** box on the right side of the window, enter the term for which you want to search.

3. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in either the name or the description. For example, if you entered AXE as your search term, only those items with AXE in the name or description would display in the grid.

4. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

IV.   RETURN SUPPLY ITEMS

NOTE: You can print an **Items Issued Report** from the **Return Item** window. This report can help you quickly identify the items you need to return.

◀—**Read Note**

A. To use the **Return Items** button to return a Supply Item:

1. Click the item being returned in the **Items Issued** grid.

2. Click the **Return Items** button to open the **Return Item** window.

3. In the first box, enter the total quantity , then select **READY FOR ISSUE** or **NOT READY FOR ISSUE** from the drop-down list.

4. In the second box, enter the total quantity, then select **READY FOR ISSUE** or **NOT READY FOR ISSUE** from the drop-down list.

5. Click the **Save** button to return the item.

NOTE: If your team is part of the Supply Pilot, you can scan either the bar code in the Smart Book or the NFES bar code on the item to initiate the return process for that item. When you scan the bar code, the **Return Item** window opens with that item selected. Follow instructions 3 - 5 to complete the return.

◀—**Read Note**

B. To use the **Return By Property #** button to return a Supply Item:

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1. Click the **Return by Property #** button.

2. From the **Property Number** drop-down list, select the Property Number for the item being returned.

3. If the item being returned it ready for issue, click the **Ready For Issue** option. If the item is not ready for issue, click the **Not Ready For Issue** option.

REVIEW UNIT OBJECTIVES.   ◄——**Instructor Comments**

COURSE: I-Suite

UNIT: 10.4 - Transfer Supply Items

SUGGESTED TIME: 30 minutes

TRAINING AIDS: Computer projector, screen, computer
                                     (one for instructor and one per
                                     trainee).

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

     1. Transfer selected items from
one Resource or Location to
another.

     2. Perform an Advanced Search.

     3. Remove Transfer Items from
Items Transferred List before
transferring.

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INTRODUCE THE UNIT.

PRESENT UNIT OBJECTIVES.

I. TRANSFER SUPPLY ITEMS

  A. Transfer Supplies

  B. Advanced Search

  C. Remove Transfer Items

II. TRANSFER SUPPLIES

  A. To transfer supplies from one resource or location to another:

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

      OR

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

  2. From the **Supply** drop-down menu, select the **Transfer (At Incident)** option.

  3. To transfer a supply item to a resource, click the resource in the **Issue To** grid.

      OR

      To transfer the supply item to a resource and a location, click the resource in the **Issue To** grid and select the location from the **Location** drop-down list.

      OR

      To transfer the supply item to a location, click the **UnSelect Resource** button. Then select the location from the **Location** drop-down list.

  4. In the **Items for Transfer** grid, click the item that is being transferred.

◄——**Read Note**

NOTE: Only items that are **Trackable** and **Issued** to a resource are listed in the **Item Name** grid. **Trackable** items are those supply items with a **Property Number** defined. **Property Numbers** can be defined when the supply item is

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Added, **Received** or **Issued**.

    5. Click the **Select Item** button to open the **Transfer Item** window.

    6. In the **Remarks** area, type any remarks concerning the transfer.   ←—**Read Note**

NOTE: You can only enter **Remarks** on the **Transfer Item** window. The name of the item and the quantity being transferred are automatically defined, based on the information specified when it was initially issued.

    7. Click the **Save** button to save the transfer item to the **Item Transferred** grid.

    8. If there are multiple items being transferred to the selected person, repeat steps 4 - 7 for each item.

    9. Click the **Transfer Item(s)** button to transfer the item(s) listed in the **Items Transferred** grid to the selected resource or location.

    10. When the **Waybill** displays in the **Preview** window, click the **Print Report** button to print the Waybill.

    11. When the **Print** window displays, click the **Print** button to print the **Waybill**.

III. ADVANCED SEARCH

  A. To perform an Advanced Search for a Supply Item in the Items for Transfer grid:

    1. In the **Advanced Search** box on the right side of the Supply Transfer window, enter the term for which you want to search.

    2. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in either the name or the description. For example, if you entered AXE as your search term, only those items with AXE in the name or description would display in the grid.

    3. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

IV. REMOVE TRANSFER ITEMS

  A. To remove an item from the **Items Transferred** grid:

    1. Click the item you want to remove in the **Items**

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Transferred grid.	
2. Click the **Remove Item** button to open the **Transfer Item** window.	
3. Enter any applicable remarks in the **Remarks** box, and click the **Save** button. The item is removed from the Items Transferred grid.	
REVIEW UNIT OBJECTIVES.	◄——Instructor Comment

DETAIL LESSON OUTLINE

COURSE: I-Suite

UNIT: 10.5 - Release Supply Items

SUGGESTED TIME: 30 minutes

TRAINING AIDS: Computer projector, screen, computer
                                         (one for instructor and one per
                                         trainee).

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

                                         1. Filter supply items in the
                                             Items for Release grid.

                                         2. Permanently release supply
                                             items to an outside location.

                                         3. Perform an Advanced Search.

                                         4. Remove or change the
                                             Quantity for an item in the
                                             Items Released grid.

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INTRODUCE THE UNIT.

PRESENT UNIT OBJECTIVES.

I.   RELEASE SUPPLY ITEMS

    A. Filter Supplies listed in Items for Release grid.

    B. Permanently release supply items.

    C. Advanced Search.

    D. Remove/Change Release Items.

II.   FILTER SUPPLY ITEMS

    A. Use the filter buttons at the top of the window to filter the **Items for Release** grid based on the following:

       1. To list all supply items, click the **All** button.

       2. To list only those supply items without an NFES number, click the **Non NFES** button.

       3. To list only those supply items with an NFES number, click the **Only NFES** button.

       4. To list only accountable supply items, click the **Account** button.

    B. Use the options listed under **Show Items** to filter the **Items for Release** grid based on the following:

       1. To list all supply items, regardless of the incident selected, click the **All** option under **Show Items**.

       2. To list only those supply items for the incident, click the **Only at Incident** option under **Show Items**.

III.   PERMANENTLY RELEASE SUPPLIES

    A. To use the **Select Item** button to permanently release supply items to an outside location:

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

          OR

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

       2. From the **Supply** drop-down menu, select the **Release (Permanent)** option.

       3. In the **Location** grid at the top of the window, click to

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select the **Location** to which items will be released.

4. In the **Items for Release** grid, click to select the **Supply Item** to release.

5. Click the **Select Item** button to open the **Release Items** window.

6. In the **Enter Quantity** box, type the total quantity to release.

7. In the **Remarks** box, type any applicable remarks.

8. Click the **Save** button to save the release information.

9. Repeat steps 4 - 8 for each item being released to the selected location.

NOTE: If your team is part of the Supply Pilot, you can scan either the bar code in the Smart Book for the item you are releasing or the NFES bar code on the item. When you scan the bar code, the system automatically displays the item in the **Items Released** grid. ◄——**Read Note**

8. In the **ETD** box, enter the **Estimated Time of Departure**, if applicable.

9. In the **ETA** box, enter the **Estimated Time of Arrival**, if applicable.

10. Click the **Save Items** button to release those items listed in the **Items Released** grid to the selected location. The **Waybill** opens in the **Preview** window. If it does not, click the **Preview/Print WayBill** button.

11. When the **Print** window opens, select the printer where you want to send the **Waybill**. Then click the **Print** button.

B. To use the **Quick Release** button to permanently release supply items to an outside location:

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

OR

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

2. From the **Supply** drop-down menu, select the **Release (Permanent)** option.

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3. In the **Location** grid, click the location to which you are releasing the items.

4. Click the **Quick Release** button to open the **Quick Release Item(s)** window.

5. In the **NFES # to Release** box, enter the appropriate NFES number.

6. If you are issuing more than one supply item with the same NFES number, click to check the **Do not clear NFES #** checkbox. This leaves the NFES number in the **NFES#** box after you click the **Save** button.

7. If applicable, select a property number for the item from the **Property Number** drop-down list.

8. Enter the **Quantity to Release**.

9. Enter any comments about the item being issued in the **Remarks** box.

10. Click the **Save** button to save the items to the **Items Released** grid.

NOTE: The **Quick Release Item(s)** window remains open after you save the new item count. This enables you to quickly add another release item.   ◄——**Read Note**

11. To enter additional items, repeat the steps 5 - 10.

12. After all of the items have been added to the **Item Issued** grid, click the **Cancel** button, to close the **Quick Release Item(s)** window.

13. In the boxes above the **Items Released** grid, enter the **ETD** (Estimated Time of Departure) and the **ETA** (Estimated Time of Arrival).

14. To finish the release process, click the **Save Item(s)** button next to the **Items Released** grid.

IV. ADVANCED SEARCH

A. To perform an Advanced Search in the Items for Release grid:

1. In the **Advanced Search** box on the right side of the window, enter the term for which you want to search.

2. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in

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either the name or the description. For example, if you entered AXE as your search term, only those items with AXE in the name or description would display in the grid.

3. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

V.   REMOVE/CHANGE RELEASE ITEMS

   A. To remove or change the quantity of an item listed in the Items Released grid:

   1. In the **Items Released** grid, click to select the incorrect item.

   2. Click the **Remove/Change Release** button to open the **Release Item(s)** window.

   3. In the **Enter quantity to Release** box, enter the quantity of the item to release.

   NOTE: To remove the item from the **Items Released** grid, enter **0** (zero) in the **Enter quantity to Release** box.

◄——**Read Note**

REVIEW UNIT OBJECTIVES.

◄——**Instructor Comment**

COURSE: I-Suite

UNIT: 10.6 - Add/Edit Supply Items

SUGGESTED TIME: 30 minutes

TRAINING AIDS: Computer projector, screen, computer (one for instructor and one per trainee).

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

1. Add Supply Items
2. Edit Supply Items

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INTRODUCE THE UNIT.

PRESENT UNIT OBJECTIVES.

I. ADD/EDIT SUPPLIES

   A. Add Supplies

   B. Edit Supplies

II. ADD SUPPLIES

   A. To add Supply Items:

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

     OR

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

     2. Click the **Add Supply Item** button in the **Supply** toolbar.

     3. On the **Supply - Add Supply Item** window, click the **Add** button.

     4. In the **Name** box, type the name of the supply item. This information is required.

     5. In the **Description** box, type a description of the supply item. This information is required.

     6. In the **NFES #** box, type the **National Fire Equipment System** (NFES) number for the item.

     7. From the **Category** drop-down list, identify whether the item is **Consumable**, **Durable** or **Trackable**.

     8. If applicable, type the property number assigned to the item in the **Property #** box.

     9. From the **From Location** drop-down list, select the location where the item originated.

     10. From the **Supply Catalog Access** drop-down list, select the departments who should have access to the item. The options include **Supply Only**, **Communications Only**, or **All**.

     11. In the **Cost** box, type the cost of the item.

     12. If the item is a rental, click to check the **Rental Item** checkbox.

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13. In the **Qty On Hand** box, type the total number of the item currently available at the incident.

14. In the **ReOrder Qty** box, type the quantity at which the item should be re-ordered.

15. From the **Qty Per Container** drop-down list, select the total quantity included in each container for the item.

16. From the **Unit of Issue** drop-down list, select the unit at which the item is issued.

17. If the item is a hazardous material, select the hazard type from the **Hazardous** drop-down list.

18. Type the item's measurements in the **Weight-US (lbs)**, **Weight-Metric (kgs)**, or **Cubes (ft^3)** box.

19. In the **Remarks** box, type any applicable remarks for the item.

20. To save the **Supply Item**, click the **Save** button.

21. When you have finished adding all of the appropriate items, click the **Close** button to close the **Supply - Add Supply** Item window.

III. EDIT SUPPLIES

A. To edit supply items:

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

   OR

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

2. Click the **Add Supply Item** button in the **Supply** toolbar.

3. Click one of the following buttons to filter the **Supply Item** grid at the top of the window:

   a. **All** - Displays all supply items.

   b. **Non NFES** - Displays supply items without an NFES number.

   c. **Only NFES** - Displays only supply items with an NFES number.

4. In the **Supply Item** grid at the top of the window, click to select the supply item you want to edit. The

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information for the item displays in the **Edit Supply Item** area at the bottom of the window.

NOTE: If your team is part of the **Supply Pilot**, you can scan either the bar code in the **Smart Book** for the item you are editing or the **NFES Bar Code** on the item. When you scan the bar code, the system automatically displays that supply item in the **Edit Supply Item** area at the bottom of the window.

5. If the Supply Item is one from the Supply Catalog, the only information you can change is the **Supply Catalog Access**.

◄——Read Note

If the Supply Item is one that is not from the Supply Catalog, you can change all data for the supply item.

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

7. When you have finished editing all appropriate items, click the **Close** button to close the **Supply - Add Supply Item** window.

REVIEW UNIT OBJECTIVES.

◄——Instructor Comment

DETAIL LESSON OUTLINE

COURSE: I-Suite

UNIT: 10.7 - Add/Edit Locations

SUGGESTED TIME: 30 minutes

TRAINING AIDS: Computer projector, screen, computer
                                 (one for instructor and one per
                                 trainee).

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

                                 1. Add Within Incident
                                     Locations.

                                 2. Edit Within Incident
                                     Locations.

                                 3. Add Outside Incident
                                     Locations.

                                 4. Edit Outside Incident
                                     Locations.

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INTRODUCE THE UNIT.

PRESENT UNIT OBJECTIVES.

I. ADD/EDIT LOCATIONS

    A. Add Within Incident Locations

    B. Edit Within Incident Locations

    C. Add Outside Incident Locations

    D. Edit Outside Incident Locations

II. ADD WITHIN INCIDENT LOCATIONS

    A. To add locations that are within the incident:

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

        OR

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

      2. Click the **Add/Edit Location Other** button in the **Supply** toolbar.

      3. On the **Add Location/Other** window, click the **Within Incident** button, and then click the **Add** button.

      4. In the **Location/Other Name** box, type the name of the location. The **Location Name** is required.

      5. In the **Location Code** box, type the code to assign to the location. The **Location Code** is required.

      6. In the **POC Name** box, type the name of the point - of-contact at the location.

      7. In the **POC Phone #** box, type the telephone number for the point-of-contact.

      8. In the **POC Email** box, type the e-mail address for the point-of-contact.

      9. In the Latitude box, enter the location's latitude.

      10. In the Longitude box, enter the location's longitude.

      11. In the **Remarks** box, type any remarks applicable to the location.

      12. Click the **Save** button to save the location.

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13. Click the **Close** button to close the **Add Location/Other** window.

III. EDIT WITHIN INCIDENT LOCATIONS

    A. To edit a location that is within the incident:

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

        OR

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

      2. Click the **Add/Edit Location Other** button in the **Supply** toolbar.

      3. On the **Add Location/Other** window, click the **Within Incident** button.

      4. Click the location you want to edit in the grid at the top of the window.

      5. For inside locations that you added, you can change all of the location's information. For inside locations that are standard in the system, you can make changes to the following information:

          a. POC Name

          b. POC Phone #

          c. POC Email

          d. Latitude

          e. Longitude

          f. Remarks

      6. Click the **Save** button to save your changes.

      7. Click the **Close** button to close the **Add Location** window.

IV. ADD OUTSIDE INCIDENT LOCATION

    A. To add a location that is outside of an incident:

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

        OR

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

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2. Click the **Add/Edit Location Other** button in the **Supply** toolbar.

3. On the **Add Location/Other** window, click the **Outside Incident** button, and then click the **Add** button.

4. In the **Location/Other Name** box, type the name of the location. The **Location/Other Name** is required.

5. In the **Location Code** box, type the code to assign to the location. The **Location Code** is required.

6. From the **Location Type** drop-down list, select one of the following location types:

    a. **B** - Business Address

    b. **L** - Local Cache Address

    c. **N** - National Cache Address

    d. **R** - Regional Cache Address

7. In the **Address 1**, **Address 2**, **City**, **State**, and **Zip** boxes, type the location's address.

8. In the **POC Name** box, type the name of the point-of-contact at the location.

9. In the **POC Email** box, type the e-mail address for the point-of-contact.

10. In the **POC Phone #** box, type the telephone number for the point-of-contact.

11. In the **Fax Phone #** box, type the fax number for the point-of-contact.

12. In the **Remarks** box, type any remarks applicable to the location.

13. To save the new **Location**, click the **Save** button.

14. To close the **Add Location/Other** window, click the **Close** button.

V. EDIT OUTSIDE INCIDENT LOCATION

A. To edit a location that is outside of an incident:

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

OR

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

2. Click the **Add/Edit Location** button in the **Supply** toolbar.

3. Click the **Outside Incident** button. Then click to select the location you want to edit in the grid at the top of the window.

4. For outside locations that you added, you can change all of the location's information. For outside locations that are standard in the sytem, you can make changes to the following information:

     a. POC Name

     b. POC Email

     c. Remarks

5. Click the **Save** button to save any changes you made.

6. Click the **Close** button to close the **Add Location** window.

REVIEW UNIT OBJECTIVES.   ◀──**Instructor Comment**

<u>DETAIL LESSON OUTLINE</u>

COURSE: I-Suite

UNIT: 10.8 - View Supply History

SUGGESTED TIME: 15 minutes

TRAINING AIDS: Computer projector, screen, computer (one for instructor and one per trainee).

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

         1. View a History of Supply Transactions.

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INTRODUCE THE UNIT.

PRESENT UNIT OBJECTIVES.

I.   VIEW SUPPLY HISTORY

   A. To view a history of Supply transactions:

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

       OR

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

     2. Click the **View History** button in the **Supply** toolbar.

     3. Click the **Resource/Location** button to view a list of resources and locations with supply transactions.

       OR

       Click the **Supply Items** button to view a list of items with supply transactions.

     4. Click the plus sign (+) next to a **Resource/Location** or a **Supply Item** to display a list of transactions.

     5. When you have finished viewing the supply transactions, click the **Close** button to close the **View Supply History** window.

REVIEW UNIT OBJECTIVES.

<center>DETAIL LESSON OUTLINE</center>

COURSE: I-Suite

UNIT: 10.9 - Supply Inventory

SUGGESTED TIME: 30 minutes

TRAINING AIDS: Computer projector, screen, computer
                                    (one for instructor and one per
                                    trainee).

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

1. Turn Inventory Tracking ON.

2. Manually change inventory
    counts.

3. Perform an Advanced Search
    of supply items.

4. Change a supply item
    quantity.

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INTRODUCE THE UNIT.

PRESENT UNIT OBJECTIVES.

I. SUPPLY INVENTORY

    A. Turn Inventory Tracking ON.

    B. Manually change inventory counts.

    C. Perform an Advanced Search.

    D. Change a supply item quantity.

II. TURN INVENTORY TRACKING ON

    A. To turn Inventory Tracking on:

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

        2. Click the **Supply** tab.

        3. Click to check the **Track Inventory** checkbox.

        4. To save the change, click the **Save** button. Then click the **OK** button to close the **Options** window.

NOTE: If supply items were not **Received** in the **Supply** module, your inventory counts will be off when you turn on the **Inventory Tracking** option.

III. MANUALLY CHANGE INVENTORY COUNTS

    A. To use the **Correct Item Inventory** button to update Inventory Counts in the Supply module based on a manual count:

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

        OR

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

        2. From the **Supply** drop-down menu, select the **Inventory** option to open the **Supply-Inventory** window.

        3. In the **Items to Inventory** grid, click the supply item that needs corrections made to the inventory count.

        4. Click the **Correct Item Inventory** button to open the **Correct Item Inventory** window.

5. In the **Actual NRFI** box, type the total number of items that are **Not Ready For Issue**.

6. In the **Actual RFI** box, type the total number of items that are **Ready For Issue**.

7. Click the **Save** button to save the counts to the **Corrected Inventory Items** grid.

8. Repeat steps 3 - 7 for each supply item that needs corrections made to the inventory count.

NOTE: If your team is part of the **Supply Pilot**, you can scan either the bar code in the **Smart Book** for the inventory item or the **NFES Bar Code** on the item. When you scan the bar code, the system automatically opens the **Correct Item Inventory** window with the scanned inventory item selected. Repeat steps 5-7.

← Read Note

9. After all of the inventories that needed corrections have been added to the **Corrected Inventory Items** grid, click the **Save** button that displays on the right side of the window.

B. To use the **Quick Inventory** button to manually change inventory counts:

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

   OR

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

2. From the **Supply** drop-down menu, select the **Inventory** option.

3. Click the **Quick Inventory** button to open the **Quick Adjust Inventory Item Counts** window.

4. In the **NFES #** box, type the NFES number for the item that needs corrections made to the inventory count.

5. If appropriate, type a property number in the **Property Number** box or select the number from the drop-down list.

6. In the **Actual NRFI** box, type the total number of items that are **Not Ready For Issue**.

7. In the **Actual RFI** box, type the total number of items

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that are **Ready For Issue**.

8. Click the **Save** button to save the item counts to the **Corrected Inventory** Items grid.

NOTE: The **Quick Adjust Inventory Item Counts** window ⟵ **Read Note**
remains open after you save the new item count. This enables
you to quickly add another adjustment.

9. Repeat steps 4 - 8 for each supply item that needs corrections made to the inventory counts.

10. After all of the inventories that needed corrections have been added to the **Corrected Inventory Items** grid, click the **Cancel** button to close the **Quick Adjust Inventory Item Counts** window.

11. Click the **Save** button that displays on the right side of the window to save the corrected inventory counts.

IV. ADVANCED SEARCH

A. To perform an Advanced Search in the Items to Inventory grid:

1. In the **Advanced Search** box on the right side of the window, enter the term for which you want to search.

2. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in either the name or the description. For example, if you entered AXE as your search term, only those items with AXE in the name or description would display in the grid.

3. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

V. CHANGE INVENTORY QUANTITY

A. To update the quantity define for an item listed in the **Corrected Inventory Items** grid:

1. Click the item listed in the **Corrected Inventory Items** grid that you want to change.

2. Click the **Change Inventory** button to open the **Adjust Inventory Item Count** window.

3. In the **Actual RFI** box, type the total number of items that are **Ready For Issue**.

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4. In the **Actual NRFI** box, type the total number of items that are **Not Ready For Issue**.	
5. Click the **Save** button to save the new quantities for the item.	
REVIEW UNIT OBJECTIVES.	←——**Instructor Comment**

DETAIL LESSON OUTLINE

COURSE: I-Suite

UNIT: 10.10 - Receive Supplies

SUGGESTED TIME: 30 minutes

TRAINING AIDS: Computer projector, screen, computer
                                 (one for instructor and one per
                                 trainee).

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

                                 1. Receive Supply Items.

                                 2. Filter Supply Items.

                                 3. Perform an Advanced Search
                                     in the Item to Receive grid.

                                 4. Remove or change the
                                     quantity for an Item Being
                                     Received.

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INTRODUCE THE UNIT.

PRESENT UNIT OBJECTIVES.

I. RECEIVE SUPPLIES

   A. Receive items into Supply.

   B. Filter Item to Receive grid.

   C. Perform an Advanced Search.

   D. Remove or change the quantity of Items Being Received.

II. RECEIVE SUPPLY ITEMS

   A. To use the **Receive Items** button to receive items into the Supply module:

NOTE: Supply items do not need to be received before issuing.

NOTE: If you are using the **Track Inventory** option, it is a good idea to receive supply items to ensure your counts are correct.

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

     OR

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

   2. Click the **Receive** button in the **Supply** toolbar to open the **Supply-Receive** window.

   3. From the **From Location** drop-down list, select the location from which you are receiving the supply item.

NOTE: If you do not select a location before receiving a supply item, a message displays indicating that a location was not selected. Click the **Yes** button to receive the item without selecting a location. Click the **No** button to cancel the receive procedure and select a location.

   4. In the **Item to Receive** grid, click the item you want to receive.

   5. Click the **Receive Item** button. A **Receive Item**

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- ←Instructor Comments
- ←Read Note
- ←Read Note
- ←Read Note

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window displays.

6. In the **Quantity to Receive** box, enter the total number of items being received.

NOTE: Make sure to enter the total number of actual items, rather than the unit of items (e.g. when receiving a box of shovels enter the number of shovels rather than the number of boxes.)   ◄——**Read Note**

7. Enter the **Property #** assigned to the item, if applicable.

8. Enter the **Serial #** assigned to the item, if applicable.

9. Enter an **Additional #** assigned to the item, if applicable.

10. In the **Remarks** box, type any remarks that apply to the receive item transaction.

11. Click the **Save** button to save the supply item to the **Items Being Received** grid.

12. Repeat steps 4 - 11 for each item you are receiving from the selected location.

NOTE: If your team is part of the **Supply Pilot**, you can scan either the bar code in the **Smart Book** for the item you are receiving or the **NFES Bar Code** on the item. When you scan the bar code, the system automatically displays the item in the **Items Being Received** grid on the screen. If there are multiple quantities you are receiving, scan the bar code multiple times to increase the quantity amount.   ◄——**Read Note**

13. When all items you are receiving are listed in the **Items Being Received** grid, click the **Save** button to complete the **Receive** procedure.

B. To use the **Quick Receive** button to receive items into the Supply module:

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

   OR

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

2. Click the **Receive** button in the **Supply** toolbar to open the **Supply-Receive** window.

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3. Click the **Quick Receive** button to open the **Quick Receive Item(s)** window.

4. In the **NFES #** box, enter the **NFES** number for the supply item you are receiving.

5. If you are receiving more than one supply item with the same **NFES** number, click to check the Do not clear **NFES #** checkbox. This leaves the **NFES** number in the **NFES#** box after you click the **Save** button.

6. In the **Quantity to Receive** box, enter the total number being received.

7. If applicable, enter a property number for the item in the **Property #** box.

8. Click the **Save** button. The item displays in the **Items Being Received** grid and the **Quick Receive Item(s)** window remains open. You can then quickly enter another item.

9. Repeat steps 4 - 8 for each item you are receiving from the selected location.

10. When you have finished receiving items, click the **Cancel** button to close the **Quick Receive Item(s)** window.

11. Click the **Save** button to finish receiving the items into **Supply**.

III. FILTER ITEM TO RECEIVE

A. On the Supply - Receive window, click one of the following buttons to filter the list of supplies:

1. **All** - Displays all supply items

2. **Non NFES** - Only displays supply items without **NFES** numbers

3. **Only NFES** - Only displays supply items with **NFES** numbers

4. **Account** - Only displays **Accountable** supply items

IV. ADVANCED SEARCH

A. To perform an Advanced Search in the Item to Receive grid:

1. In the **Advanced Search** box on the right side of the window, enter the term for which you want to

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search.

2. Click the **Search Name/Desc** button. The grid now only contains those items with the search term in either the name or the description. For example, if you entered AXE as your search term, only those items with AXE in the name or description would display in the grid.

3. To clear the filter and display all items in the grid, click the **Clear Advanced Search** button.

V. REMOVE/CHANGE ITEM BEING RECEIVED

A. To remove or change the quantity of an item in the Item Being Received grid:

1. In the **Items Being Received** grid, click the item you want to edit.

2. Click the **Remove/Change Receive** button to open the **Receive Items** window.

3. In the **Enter the correct quantity to Receive** box, enter the total number being received.

NOTE: To remove the item, enter **0** (zero) in the **Enter the correct quantity to Receive** box.   ◄——**Read Note**

4. Click the **Save** button to change the quantity or remove the item.

REVIEW UNIT OBJECTIVES.   ◄——**Instructor Comment**

```
ERROR: undefined
OFFENDING COMMAND:

STACK:
```