FIREHOUSE Software®

A C S®

FH
Guided Tour

expertise in action™

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Contents

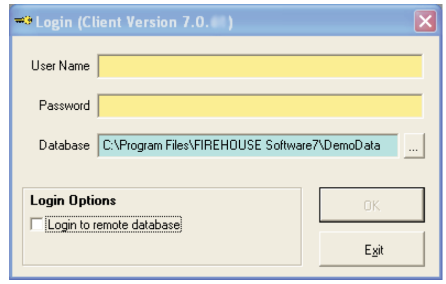
Chapter 1

FIREHOUSE Software Version 7 Guided Tour

Once you have installed the evaluation following the instructions included in the Installation Guide, you are ready to start evaluating FH for your department. This guide is intended to get you started in the right direction.

To Access FH

- Select the Windows **Start** menu *Programs* folder, then select the **FIREHOUSE Software 7** folder **FIREHOUSE Software 7** option. The **Login** form is displayed.



- Type “GUEST” in *User Name*.
- Type ”DEMO” in *Password*. Password characters are displayed as “*” when entered.
- The default database path is displayed. If you need to change the database (for example, point to an archive), you can change the path displayed in *Database*, but the original path will be displayed again when FH is launched unless you make a change to the **Workstation Options** form *Local Data & Files* section. Check *Login to remote database* to access the FH Enterprise database.
- Press **OK**.

Controlling Access

To access FIREHOUSE Software, you must have a user name and a password. Security is enabled by controlling the access of each user to specific areas.

Security serves two primary functions:

- Selective access to specific areas
- Maintain record modification history

Each user does not need access to all areas. Selective access helps assure appropriate confidentiality of sensitive information and minimizes potential administrative problems. For example, most users do not need access to staff member administrative information. You also do not want to allow all users to perform administrative actions that could impact the system. Designing security based on the individual and their responsibilities is the best way of minimizing security breaches. When you tailor specific users’ access to the areas and features they need to perform their tasks within FH, you reduce the number of things they can do wrong (intentionally or unintentionally).

Another issue to consider is the ability to track specific user activity within FH. When a specific user is logged in, that user name is tied to record entries or modifications. If a Staff ID is associated with the user setup, the staff member’s name can be associated with the user name. If questions arise about a specific record, you can access record entry information and determine who created the record and who last modified the record. If user names are shared by multiple users there is no way to determine who actually created or modified the record.

We recommend setting up a login name and password for each user. You can limit their usage level by designing the security based on the individual. Any other approach potentially disables the built in record modification tracking and/or permits security breaches. To add a user, access the **Administration** menu, **Users and Security...** option. Press **`F1`** for more information on adding users.

FH Basics

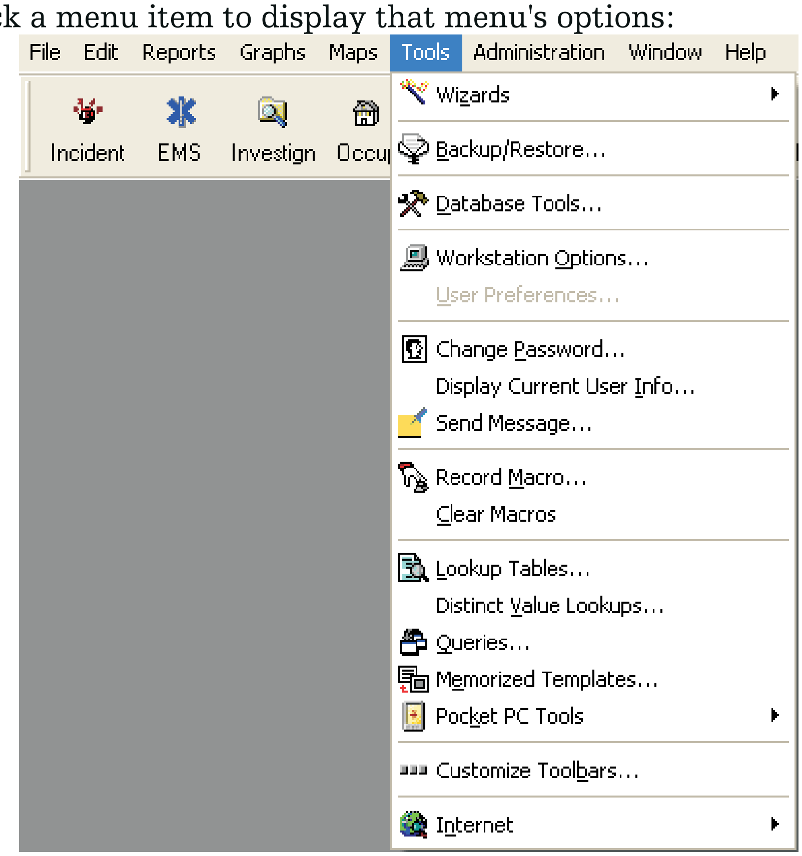
We believe that the best way to learn about FH is to try it. By default, a demonstration database with sample data is included in the installation. The default path to the database is **`C:\Program Files\FIREHOUSE Software \DEMODATA`**, your installation may vary. While logging in, change the *Database* value to point to the database to view this sample database.

Get Around FH

FH uses standard Windows interface conventions. This section lists basic program conventions like using menus, toolbars, and other areas of FH.

Menus

A menu is a collection of related options. The main menu is always displayed across the top of the FH window. The main menu is made up of individual menus. Click a menu item to display that menu's options:



Keyboard shortcuts can be used to access menu option. Keyboard shortcuts, if available, are listed to the right of the menu option.

Below are some general guidelines for using menus:

- *Menu Names* denote the different functions of the menu's options.
- *Menu Text Color* indicate availability. When a menu is black, you can select the menu with your mouse to display available options. When a menu is gray, the menu can not be accessed. Menus are inaccessible when you do not have sufficient security, or when the menu options can not be run. Also when an option under a specific menu is gray, the option is inaccessible.
- *Menu Availability* varies based on the active area of FH. Some menus appear only when the system is performing certain functions. For example, the **Form** menu is added to the main menu when any form is active.

How To Use A Menu

To run an option from a menu:

- Select the menu by either clicking on the menu name using your left mouse button, or press **`Alt`** and the underlined letter of the menu name. Menu options are displayed.
- Select the menu option. The selected option is run.

Toolbars

Toolbars display the most commonly used FIREHOUSE Software options. Each button on a toolbar runs a specific option. Pressing a button can display a specific form, set form options, run text editing options (also available from the **Edit** menu), and run user-defined commands. To run the toolbar button's option, press the desired button with your left mouse button.

Existing toolbars can be modified and you can add your own custom toolbars. The toolbars can be "docked" on the top, bottom, or sides of the FH desktop, or the toolbars can "float" anywhere in the FH desktop, or toolbars can be hidden.

Specify toolbar options via the **Tools** menu, **Workstation Options...** option, then press **Customize Toolbars...**

Default toolbars are:

- File
- Form
- Edit

File Toolbar

The file toolbar accesses major module and system forms. The standard FH toolbars can be moved anywhere in the FH workspace. To modify toolbar location or appearance, or to add custom toolbars, access the **Workstation Options** form then press **Customize Toolbars**.

	File Toolbar		
Click to display the **NFIRS Incident Report** form.	Incident	EMS	Click to display the **EMS Search/Rescue Report** form.
Click to display the **Investigation** form.	Investign	Occup	Click to display the **Occupancy** form.
Click to display the **Inspection** form.	Inspect	Staff	Click to display the **Staff** form.
Click to display the **Staff Activity** form.	Activity	Training	Click to display the **Training** form.
Click to display the **Training Program** form.	Program	Sched	Click to display the **Staff Scheduling** form.
Click to display the **Inventory** form.	Inventory	Hydrant	Click to display the **Hydrant** form.
Click to display the **Account** form.	Account	Invoice	Click to display the **Invoice** form.
Click to display the **Internal Message** form.	Message	Journal	Click to display the **Department Journal** form.

Form Toolbar

Form options provide control over form specific options.

	Form Toolbar		
Create a record template using the values from the currently displayed form.	Memorz	Recall	Create a new record using values from saved record templates.
When available, assign a new unique record identifier for the currently displayed record.	Renum	Map	When available, plot the record location and display on a map.

Edit Toolbar

Edit options access tools to make entering text and verifying entered text easier.

	Edit Toolbar		
Reverse the last performed text editing action	Undo	Cut	Remove selected text item and place it in temporary memory.
Copy the selected text item to temporary memory.	Copy	Find	Search for specific text in an active text field.
Insert the text item in temporary memory in the text field at the cursor.	Paste	Spell	Check active text field entries for spelling.

Record Selection

A record is a set of related information made up of individual fields grouped together. For example, incident information and hydrant information are two types of records.

You open a record using the toolbar button for that record type, or the **File** menu option for the record type. For example, press 

on the toolbar to access fire incident reports. What happens after accessing a record area depends on what selection option is specified.

Step 1: Specify Record Selection Option

You can choose how records are selected. To specify which option is used for opening records:

- Access the **Tools** menu, **Workstation Options...** option. The **Workstation Options** form *General* section is displayed.
- Click the *Data Entry Forms* tab.
- Select an option in the **When a data entry form first loads...** area:
  - *Load the last record I was working with* opens the last modified record when a form is opened.
  - *Start with a new, blank record* opens blank data entry forms.
  - *Display the default query so I can select records* displays the default browse list of available records.

NOTICE
Form Load Option

Which one you choose should be based on how FH is used at the workstation. For example, if the workstation is used for data entry, *Start with a new, blank record* is a good choice.

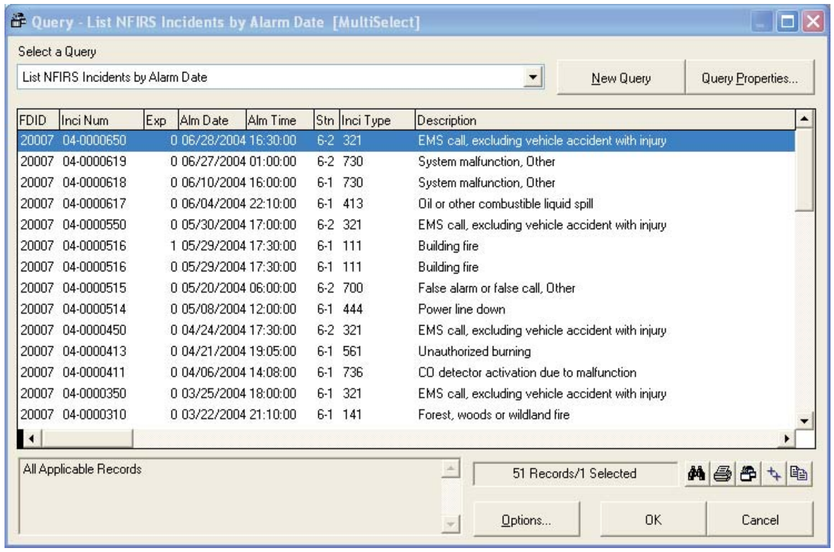
- Press **OK** to save your selection and close the **Workstation Option** form.

Step 2: Selecting Records To Browse

To browse available records, you display a query that lists available records, select records from a list, then open the records and browse them. The FH evaluation includes sample data from a fictitious department.

- The browse list may be displayed when you open a record, or the data entry form may be displayed and you need to press **Browse**. The method varies based on the form load option specified in the **Workstation Option** form *General* section *Data Entry Forms* section, **When form first loads...** area.

When you display the browse list, the default query for the area displays a list of available records.



- You can either select a single record, select a range of records, or select multiple separate records.
  - To select a single record:
    - Select a single record either by double clicking on the record in the list, or highlight the record, then press **OK**.
  - To select a range of records:
    - Highlight the first record.
    - Press and hold **`Shift`** on your keyboard, then click on the last record in the range and release the **`Shift`** key. All records in the range are highlighted.
    - Press **OK** to add selected records to your browse list.
  - To select two *separate* records:
    - Highlight the first record.
    - Press and hold the **`Ctrl`** key on your keyboard, then click the second record and release the **`Ctrl`** key.
    - Repeat the above process for each additional separate record, then press **OK** to add selected records to your browse list.

After selecting record(s) to browse, the record form is displayed with the first record's values in the form fields.

Step 3: Browsing Selected Records

Standard record navigation tools for browsing records are displayed at the bottom of forms displaying records. The navigation buttons are only available if multiple records are selected. The navigation tools and their keyboard equivalents are shown below.

 Go to the first record (no keyboard equivalent)

◄ Go to the previous record (**Ctrl** + **<-**)

► Go to the next record (**Ctrl** + **->**)

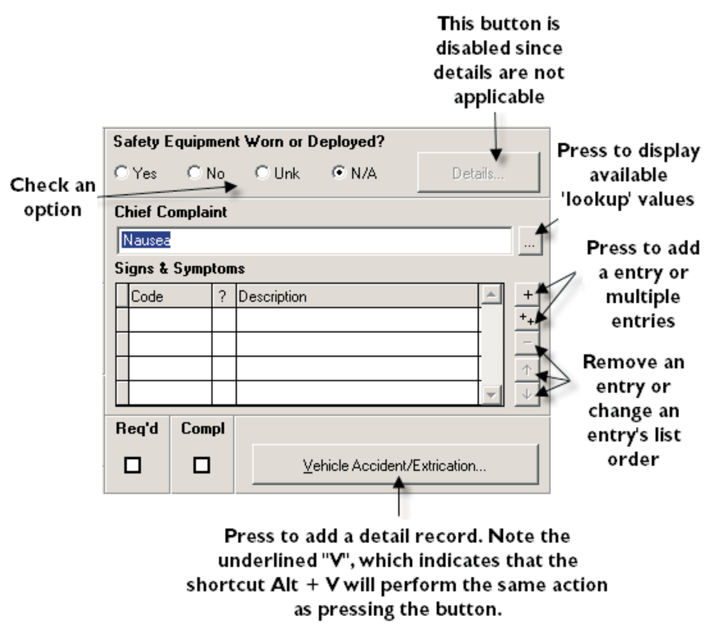
►| Go to the last record (no keyboard equivalent)

NOTICE
Record Sort Order

The query you select records from sets the sort order of your browse records.

Command Buttons

Command buttons start FIREHOUSE Software processes when selected using the mouse. Below are examples of command buttons.



Press Button

To use a command button, position the cursor over the button with your mouse, then press the left mouse button. For example, if you pressed the **Vehicle Accident/Extrication** button, the process for entering the additional accident/extrication information is initiated.

Lookup Driven Fields

Lookup driven fields in FIREHOUSE Software accept only valid codes that are stored in lookup tables. When entering values in lookup driven fields, you can type the code directly into the field, or display a list of valid codes for the field.

Since only valid codes are accepted, you do not have to worry about misspelled text in these fields, or invalid entries. All valid values are available with a single mouse click, so values can also be quickly entered. Powerful word searches are included for locating specific values.

Here's how it works. Lookup driven fields have a ... to the right of the field. When your cursor is in a field that has a lookup table associated with it:

- Press ... to display a list of valid codes. Alternatively, you can display lookups by double-clicking in the field, pressing **`F2`**, or right-clicking and selecting the **Lookup...** menu option.
- Locate and double click the appropriate value to insert the value into the field.

NFIRS 5 Lookup Codes

The NFIRS 5 Specification requires that certain values be entered as base codes in a NFIRS incident report. These base codes cannot be modified.

Plus One Codes

An additional code can be appended to NFIRS 5 codes, allowing departments to gather additional information without modifying the base NFIRS code. This additional code is referred to as a Plus One code. For example, a "111" Incident Type is a "Building Fire". The "111" code cannot be modified directly; a department could add an "A" plus one code to "111" with a description like "Apartment Building Fire". Plus one codes allow additional lookup codes to be added to the NFIRS 5 set, allowing departments to track incidents by more specific criteria than the base NFIRS code set supports. States can also require that certain plus one codes be used.

Form Navigation

Forms in FH are designed to simplify data entry.

Color Coding

FH form elements are color-coded. Default colors are listed below:

- Required empty fields are shaded yellow.
- Required complete fields are shaded blue.
- Invalid critical entries in fields are shaded bright red.
- Potentially invalid, but not critical entries are shaded purple.

- Tabs marking form sections are color coded:

If the tab text is:	The section is:
Red	required and not completed.
Green	completed.
Black	optional.
Blue	optional data is completed.
Gray	disabled (no data entry allowed).

Set your own color-codes from the **Tools** menu, **Workstation Options...** option. Click the *Tab & Field Coloring* tab and specify coloring options.

Keyboard Navigation

You can use the keyboard to move around FH forms:

- **`Tab`** moves the cursor to the next field, command button, or form section tab.
- Form section tabs and buttons can be accessed by pressing **`Alt`** plus the underlined letter in the button or form section tab label.
- Main form command buttons (at bottom of form) can be run using the keyboard:
  `Ctrl + N` initiates new record.
  `Ctrl + O` opens an existing record*.
  `Ctrl + S` Saves active record.
  `Ctrl + D` Deletes active record.
  `Ctrl + P` Prints currently displayed record.
  `Ctrl + Y` Saves and opens new form.
  `Ctrl + W` Saves and closes active form.
  ***`Ctrl`** + **`U`** opens the **Occupancy** form from incident report forms.

Right Mouse Clicks

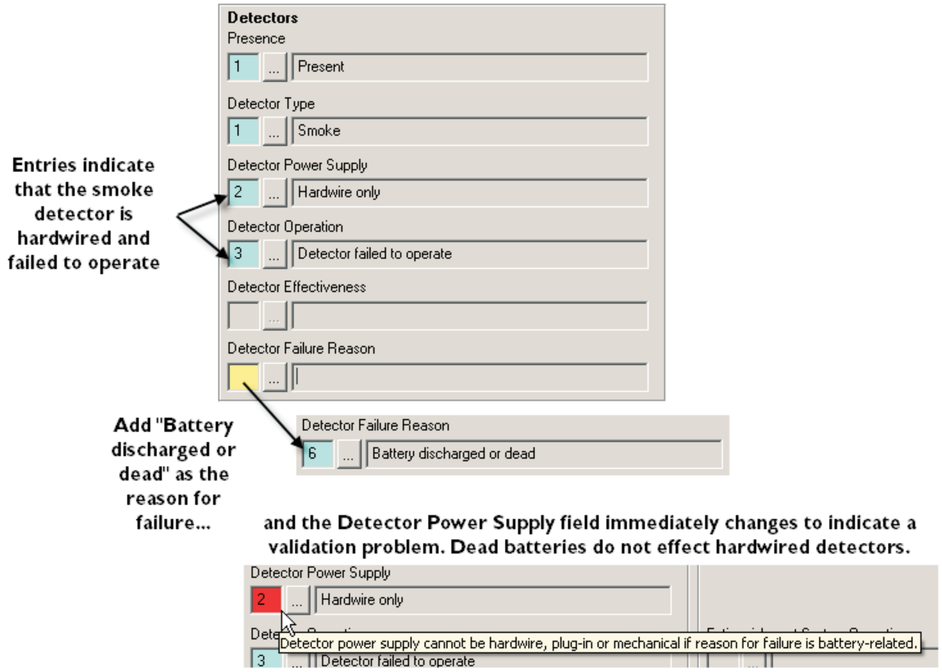
Right click displays a menu of options. The options included on the menu depend on where the mouse cursor is positioned when the right mouse button is clicked.

Field Level Validation

When you enter a value into an FH record that is invalid or conflicts with information already entered, the field is immediately highlighted and placing the cursor over the field displays an explanation of why the entry is invalid.

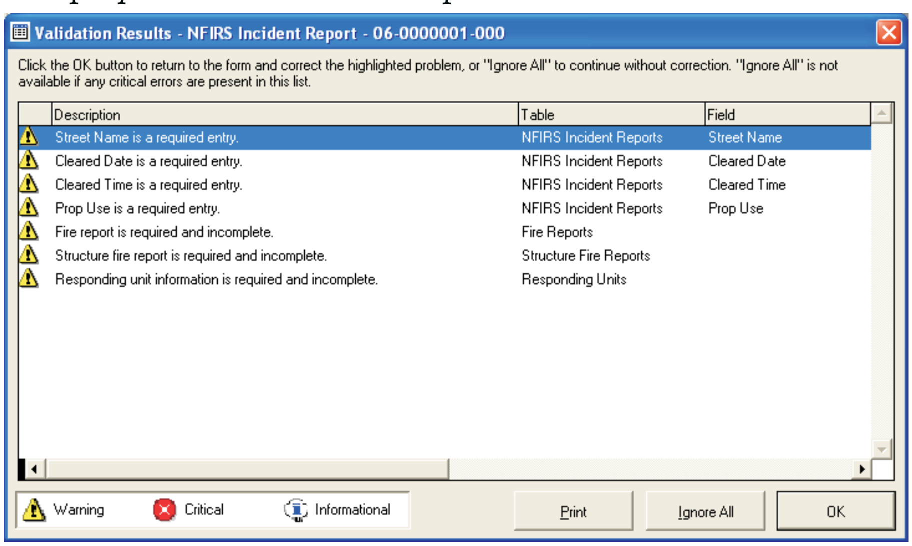
For example, if you enter an incident report type `111`, structure information is required. The following sequence of adding information to the *Detectors & Extinguishment System* section of the **Structure Fire Report** form illustrates the power of field level validation.

Detector information is required. In this example, a detector is present, so the code that indicates the presence of a detector is entered.



Form Level Validation

When you save a form that is not complete based on system rules, a completion status displays with links to incomplete or invalid information.



- Press **Print** to print a listing of each incomplete item.
- Press **Ignore All** to save the report without correcting listed problems (not an option if there are critical errors, critical errors still need to be corrected).
- Press **OK** to go to the highlighted problem.

Double-click on the listed problem, and the field with the problem is displayed.

NFIRS 5 Incident Reporting

The NFIRS 5.0 Incident Report module is available individually or as part of a bundled system. Incident Investigation Reports are included with the NFIRS 5.0 Incident Report module.

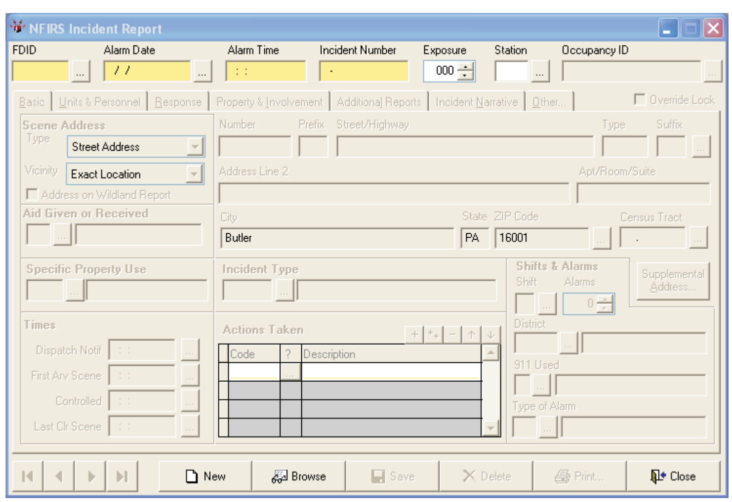
The NFIRS 5 incident report is made up of a collection of sections (NFIRS calls these "modules") that gather specific incident related information. The sections required to complete an incident report vary based on what type of incident is indicated.

Investigation reports may or may not be linked to a specific incident. Investigation reports can include information about people performing investigation activities, referrals, evidence collected, photos, leads, and other information required to detail investigation efforts.

To Create A New Basic Incident

- From the **File** menu, select the **NFIRS 5 Incident Reporting** option **NFIRS 5 Incident Report** option.
  - If the **NFIRS Incident Report** form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record.
  - If a blank **NFIRS Incident Report** form is opened, you are ready to enter a new staff member.
  - If the default query for selecting **NFIRS Incident Reports** is displayed, press **Cancel**.

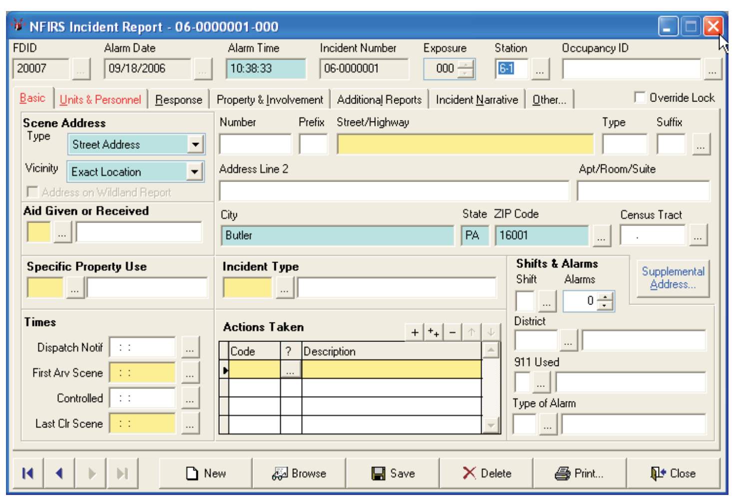
Basic information shared throughout all areas of the fire incident report are displayed in the form header.



- *FDID* is automatically entered based on the station indicated on the **Workstation Options** form *Workstation Location* field (*FDID* is associated with *Station*). *FDID* is a unique identifier assigned by the state to identify a particular fire department within the state. FDID may also identify the county, fire district, or other jurisdiction in which the fire department is located. Many states use the two left-most digits to identify the particular department within a jurisdiction. *FDID* is five digits.
- Type the month, day, and year of the incident in *Alarm Date*. This date is when the alarm was received. The *Alarm Date*, in conjunction with the other required fields (*FDID*, *Alarm Time*, *Incident Number*), uniquely identifies each incident.
- Type the *Alarm Time* that the alarm was received. Use military time. Required for all incidents.
- Type the *Incident Number*, or press **Tab** to allow FH to assign the next available number if auto-numbering is enabled. This number is used to identify a particular incident and to tie data from different modules together. Enter the number assigned to the incident. It may be necessary to obtain this number from an alarm or dispatch center.

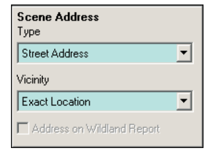
NOTICE
Exposures

If this is an exposure, type the *Incident Number* of the base incident then press **Tab** and press **New Exposure**. Only incidents with a 1XX *Incident Type* can have exposures. Each module completed for an exposure should contain the same incident number assigned to the original property involved. A separate sequential exposure number is assigned to each exposure. The original incident is always coded "000", while exposures are numbered sequentially beginning with "001". The relevant data for each exposure should then be recorded using the appropriate section. Treat similar items in a group as a single exposure (such as a fleet of cars).



- Press **Yes** if **Create new record** prompt is displayed. A new record is created. This prompt can be disabled via the *Workstation Options* form *General* section *Data Entry Forms* section.
- Type or lookup the *Station* code. *Station* provides a means of tracking incident data that has been collected and reported by individual stations. Specific feedback on incident experience can then be prepared and sent to individual stations. Station number is also useful for analyzing different levels of activity within a fire department.

- Type or lookup the *Occupancy ID* for the occupancy record where the incident occurred. When you select an existing occupancy, address and building information from the occupancy record is added to the incident and can skip to the *Incident Type* field. Address fields are disabled when an *Occupancy ID* is used unless specified otherwise in the **Administrative Options** form *Incident* section *All Incidents* section.
- Select *Address Type*, which may be a street address, an intersection of two roadways, or directions from a recognized landmark. Incident address information is required to establish a legal report reference. This information may also be useful for identifying local problems, such as checking for multiple incidents at the same location. If the incident is a Wildland fire, *Rural/Directions* should be selected, and you can check *Address on Wildland Report* to use the address entered on the Wildland Report.



  - If you select "Street Address":
    - Type the *Number* of the specific location where the incident occurred. This number is part of the address information where the incident occurred. For structures and lots, enter the street number. For highways, railroads, etc., enter the mile-post number. For block addresses, enter the block number.
    - Type or lookup the *Prefix*, *Street/Highway*, *Type*, *Suffix* values for the incident.
    - Type the *Apt/Room/Suite* number where the incident occurred (any combination of numbers and letters). This number is part of the address information when the incident occurs within an apartment, suite, identifiable room or area generally rented or leased. Leave blank if not applicable.

NOTICE
Intersection

Use "Intersection" ONLY if the location cannot otherwise be identified.

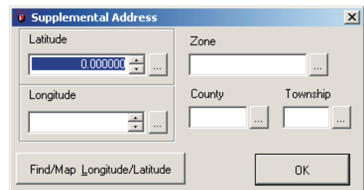
  - If you select "Intersection":
    - Type or lookup the *Prefix*, *Street/Highway*, *Type*, *Suffix* values for the incident.

NOTICE
Rural

Use "Rural" ONLY if the location cannot otherwise be identified.

  - If you select "Rural/Directions":
    - Type *Directions* to the incident location.
- Select an additional descriptor for specifying the incident location for *Vicinity*.

- Type or lookup the *City*, *State*, and *ZIP/Postal Code* where the incident occurred. *City* is the first of three fields that are part of a single lookup. If the incident occurred in an unincorporated area, use the city found in the mailing address for the incident location. The state or province may be different from the state or province where the fire department is located. *ZIP/Postal Code* completes the full address of the incident and provides a means of linking fire incident data to other geographic and population factors for comparative analysis at the local and regional levels.
- Optionally complete supplemental address information:
  - Press **Supplemental Address**.
  - Type or lookup the *Latitude* and *Longitude* of the incident address. These values, if available, ensure the most accurate plotting for mapping.
  - Complete remaining fields as needed.
  - Press **OK** to save supplemental address.



- Type or lookup the *Incident Type* code for the actual situation that emergency personnel found on the scene when they arrived. These codes include the entire spectrum of incidents the fire department responds to from fires to EMS to public service. The incident type reported here is not always the same as the incident type initially dispatched. *Incident Type* identifies the various types of incidents to which the fire department responds and allows the fire department to document the full range of incidents it handles. This information can be used to analyze the frequency of different types of incidents, provide insight on fire and other incident problems, and identify training needs. Generally select the type of incident found when emergency personnel arrived at the scene, but if a more serious condition developed after the fire department arrival on the scene, that incident type should be reported.
  The codes are organized in a series, as shown below:

Series Heading	
100	Fires
200	Overpressure Rupture, Explosion, Overheat (no fire)
300	Rescue & Emergency Medical Services Incidents
400	Hazardous Conditions (No Fire)
500	Service Calls
600	Good Intent Calls
700	False Alarm & False Calls
800	Severe Weather & Natural Disasters
900	Special Other Type of Incidents

  In general, use the lowest numbered series that applies to the incident. You will have an opportunity to describe multiple actions taken later in the report.

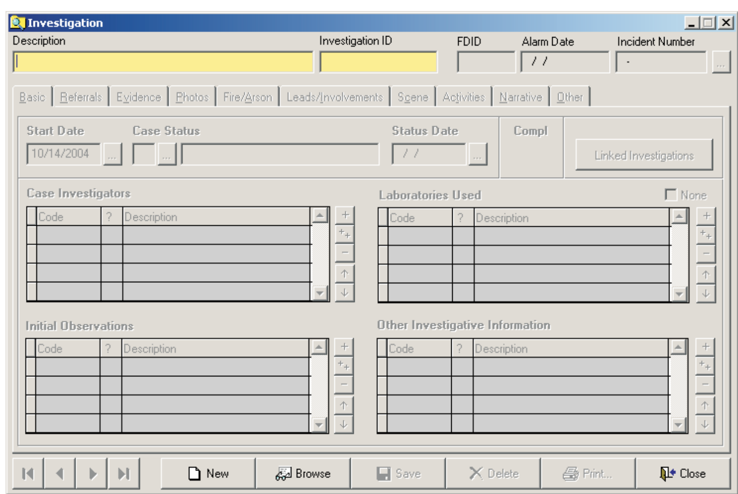
- Type or lookup the *Aid Given or Received* status. If mutual aid is received (1 or 2), mutual aid details are optional. If mutual aid is given (3 to 5) street, city, state and ZIP validation is relaxed to allow entries outside your standard entries.

- Complete *Additional Times*. If additional times go beyond midnight of the alarm date, select the lookup to open the calendar. Choose the appropriate new date, and press **OK**.
  - Type time the dispatch center was notified for *Dispatch Notif*. Leave empty if not used.
  - Type the *First Arv Scene* time. Arrival time should be the same as *Last Cleared Scene* if cancelled on the way to a call. Required for all incidents.
  - Leave *Controlled* time blank except for fires. For fires, enter the date and time that the fire was determined by the incident commander to be under control. Required for wildland fires; optional for other fires; otherwise leave blank.
  - Type the *Last Cleared Scene* time. Required for all incidents. If cancelled enroute, enter the time of cancellation.

Complete remaining fields as needed. Press **F1** for more detailed information on entering the remaining fields and detail records.

To Add Basic Investigation Information

- From the **File** menu select the **Incident Investigations** option.
  - If the **Investigation** form with the last modified record is opened, press **New** (or **Ctrl + N**) to add a new record.
  - If a blank **Investigation** form is opened, you are ready to enter a new record.
  - If the **Query** form is displayed, press **Cancel** to add a new record.



- Type a basic description of the investigation then press **Tab**.
- Type an *Investigation ID* if known, or leave blank then press **Tab**. FH automatically assigns an ID if one isn't entered (if auto-numbering is enabled via **Administrative Options** form *Key Counters* section).

Complete remaining fields as needed. Note that the investigator listed at the top of the list is considered to be the primary investigator. Press **F1** for more detailed information on entering the remaining fields and detail records.

EMS/Search & Rescue Report

Basic EMS reporting is included with NFIRS 5.0 Incident reporting, and full EMS Incident reporting is available individually or as part of a bundled system.

NFIRS 5 includes an optional EMS section that gathers EMS related data. The FH EMS module incorporates the basic NFIRS 5 EMS elements and adds additional capabilities including the ability to use the entire NHTSA code set.

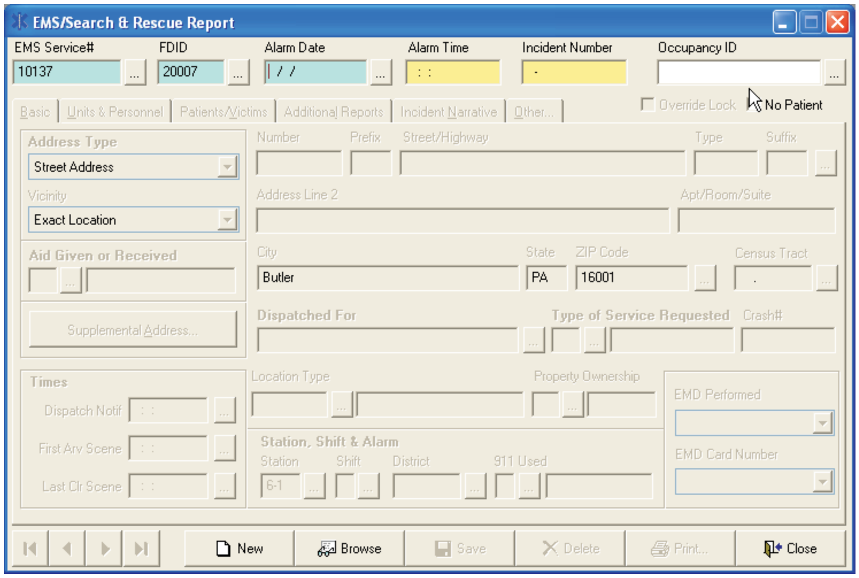
If the EMS module is not configured for your FH system, EMS Incident Reports can only be accessed from a NFIRS Fire Incident Report, and all data elements and features not specifically required by the NFIRS 5 EMS Incident Report specification are inaccessible.

Validation and available lookup codes vary based on the EMS code set selected from the **Administrative Options** form *Incident* section **EMS/Search & Rescue** subsection (accessed from the **Administration** menu, select the **Administrative Options** item, *Incident* section, then select the *EMS/Search & Rescue* subsection, *Code Set* section, then press *Active EMS Code Set*).

Carefully consider what code set works best for you. Changing code sets after EMS reports are entered will result in incomplete EMS reports.

To Add Basic EMS Incident Data

- From the **File** menu, select the **EMS/Search & Rescue Reporting** option **EMS/Search & Rescue Reports** option.
  - If the **EMS/Search & Rescue Report** form is displayed, press **New** (or **`Ctrl + N`**).
  - If the **Query** form is displayed, press **Cancel**.



- Values automatically entered in *Service #* and *FDID* are associated with the central station indicated on the **Workstation Options** form, *General* section *Startup & Navigation* section *Workstation Location* field. Change if necessary.
- Type the *Alarm Date*. This date is when the alarm was received by the fire department and must be the same as the date for the alarm time. The *Alarm Date*, in conjunction with *FDID*, *Alarm Time*, and *Incident Number* fields, uniquely identifies each incident.
- Type the *Alarm Time* that the alarm was received by the fire department. Use military time.
- Type the *Incident Number* if known, or leave blank then press **`Tab`** to automatically assign a number (auto-numbering must be enabled via the **Administrative Options** form *Incident* section). Press **Yes** if prompted to create a new record.

NOTICE
Renumber

To change *EMS Service#*, *FDID*, *Alarm Date*, or *Incident Number* after the incident is saved, you must renumber the incident via the **Form** menu **Renumber EMS/Search & Rescue Incident Reports** option.

Complete remaining fields as needed. You will generally add additional information, including units and personnel, and patient information. Press **`F1`** and press **Click for related topics...** for more information.

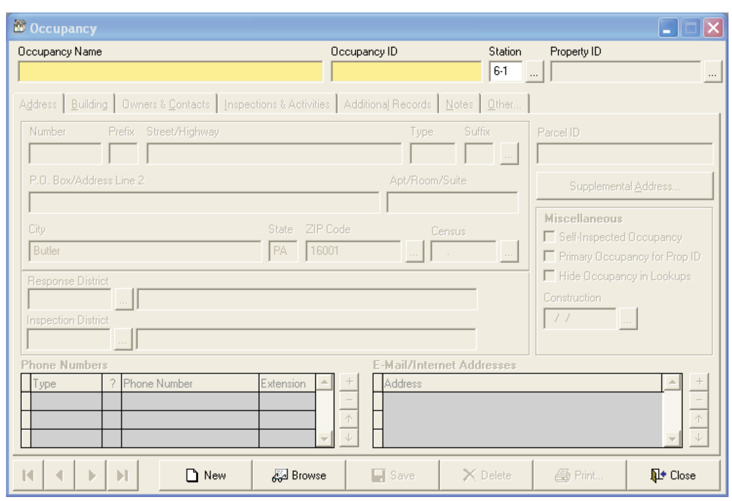
Occupancy

The Occupancy & Inspection Management module is available individually or as part of a bundled system.

Occupancy records are not required to be entered before incidents can be entered. Occupancy information can be used in incident reports if the information is included in the occupant record. For example, address information is automatically filled in to the incident report, structure information from the occupancy record is added to the incident report for certain types of incidents, and occupancy contact information can be used to complete incident involvement records.

To Add New Occupancy Record

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record.
  - If a blank **Occupancy** form is opened, you are ready to enter a new occupancy.
  - If the **Query** form is displayed, press **Cancel** to add a new record.



- Type a description of the occupancy in *Occupancy Name*.
- Type an *Occupancy ID* if known, or leave blank then press **`Tab`** if autogenerate IDs is enabled in **Administration Options**. *Occupancy ID* is used throughout the system to identify specific occupancies. Press **Yes** if prompted to add a new record.

- Type or lookup a valid station code for the *Station* that would respond to an incident at this occupancy.

NOTICE
Reports

These fields can be helpful in generating specific reports. For example, if you add station information to each occupancy, the **Occupancy List by Station** report will list occupancies sorted by station.

- Enter or lookup a *Property ID*. This field allows multiple occupancies to be associated with a single property.

NOTICE
Property ID

Use property ID to associate occupancies together when they are on the same property or under the same roof. Examples include separate apartment buildings in a complex, strip malls, schools, and manufacturing facilities. See the FH Help File 'To Add Multi-Occupancy Property Records' topic for the steps to add multi-occupancy property records.

- Enter the occupancy address information into the address fields.
- Type the *Parcel ID* assigned for the occupancy.

NOTICE
Parcel IDs

If your area does not use parcel IDs, you can use this field to track other numbers assigned to specific occupancies (for example, box numbers). You can enter a maximum of 25 characters in this field.

- Press **Supplemental Address** to add additional location information like latitude and longitude, zone, county, and township. Press **OK** when finished.
- Check *Self-Inspected Occupancy* to mark this occupancy as self-inspected. This attribute can be used to limit lists of occupancies to be inspected.
- Check *Primary Occupancy* to mark the occupancy as the primary occupancy record of occupancies using a common *Property ID*.
- Check *Hide Occupancy in Lookups* to remove the occupancy from lookups. This should not be checked if you will use the *Occupancy ID* in incident reports.

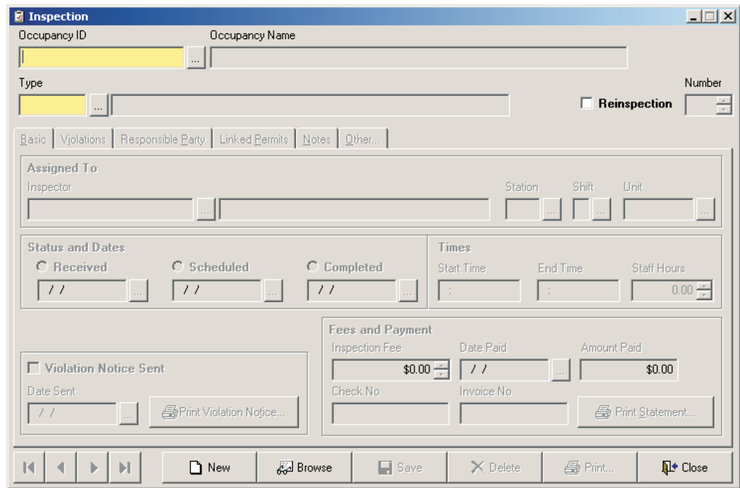
NOTICE
Response District

Response District and *Inspection District* both use *District* lookup codes. This allows for two separate values since they may be different.

Complete remaining fields as needed. You will generally add additional information like building information and preplans. Press **F1** and press **Click for related topics...** for more information.

To Add Inspections & Activities

- From the **File** menu, select the **Occupancy Management** option **Occupancies and Preplans** option.
  - If the **Occupancy** form is displayed, press **Browse** (or **`Ctrl + O`**), select the record from the list, then press **OK**.
  - If the **Query** form is displayed, select the record from the list, then press **OK**.



- Click the *Inspections & Activities* tab. Existing inspections and non-incident occupancy activities like plan reviews, public education, etc., performed at the occupancy are listed.
- Press **Add**.
  - If there are outstanding violations for this occupancy (that is, there are violations that have empty violation repair dates and no variance issued), you are prompted to select the violation. Select violations and press **OK** to add the violation details automatically to the inspection detail record, or press **Cancel** to open the **Inspection** form without adding outstanding violations.
  - If there are no outstanding violations, the **Inspection** form is displayed.
- Type or lookup a valid inspection *Type* code for the inspection.
- Enter relevant information about the inspection, including the date the complaint was called in (*Received*), the scheduled date the inspection will be performed (*Scheduled*), and the date the inspection/activity is actually performed (*Completed*).

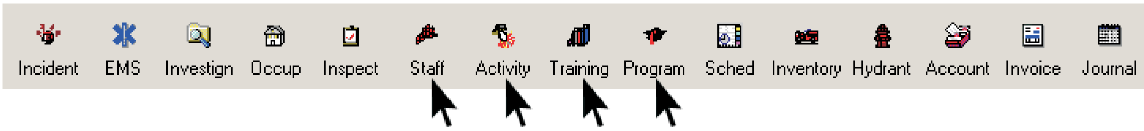
  If *Completed* is empty, any **Violation Notice** form printed for the inspection/activity detail will have no date listed for the inspection date. Use the last completed inspection/activity detail record for printing violations for the occupancy.

NOTICE
Accounts Receivable

If you use the optional Accounts Receivable module and an invoice has been created for this inspection, the *Inspection Fee* is calculated for you, but note that any additional fees associated with violations (if any) are not included in the *Inspection Fee*.

Complete remaining inspection fields as needed. Press **F1** and press **Click for related topics...** for more information.

Staff Activity and Training



The Staff Management module is available individually or as part of a bundled system.

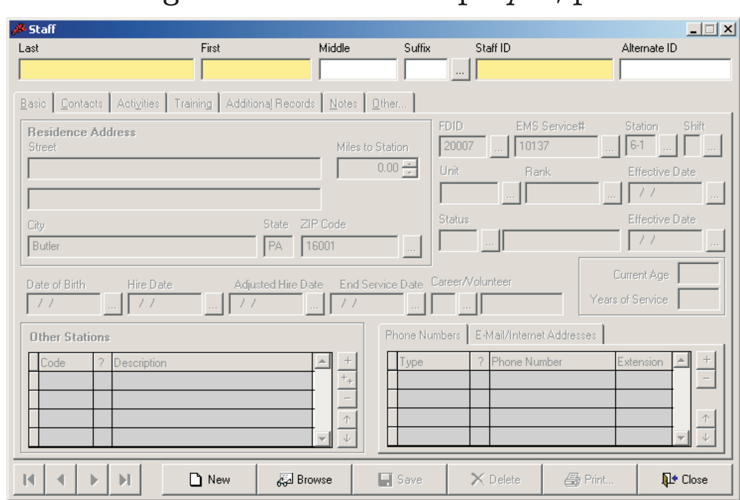
Staff Activity and Training includes staff records, staff activities, training classes, and training programs.

Staff records includes basic information about the staff member and is also used to associate specific staff members with department activities, equipment master records, and many other detail records such as occupancy inspections, and hydrant flow tests.

At a minimum, you should add base staff information for every staff member who will respond to incidents.

To Add New Staff Record

- From the **File** menu, select the **Staff Members** option.
  - If the Staff form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record
  - If a blank **Staff** form is opened, you are ready to enter a new staff member.
  - If the default query for selecting staff records is displayed, press **Cancel**.
- Type the staff member's ID in *Staff ID* if known, or leave blank and press the **`Tab`** keyboard key to have FH automatically assign an ID (if enabled from the **Administration** menu, **Administrative Options** option in the *Database* section *Key Counters* section).



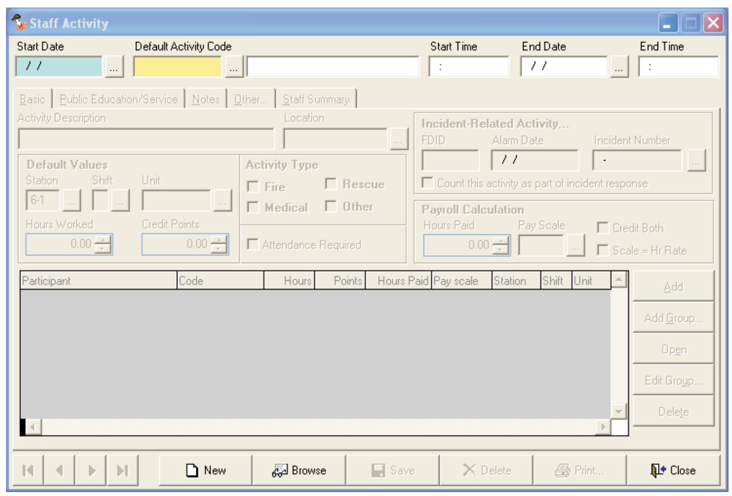
NOTICE
Staff ID

Staff ID should ***not*** be based on information that will change over time. If there is a department assigned ID that changes over time (for example, a code based on rank) use the *Alternative ID* field to track this department assigned ID.

Complete remaining fields as needed. You will typically add additional detail records for staff records like administrative information. Press **F1** and press **Click for related topics...** for more information.

To Add A New Staff Activity Record

- From the **File** menu, select the **Staff Activities** option.
  - If the **Staff Activity** form with the last modified record is opened, press **New** (or **Ctrl + N**) to add a new record.
  - If a blank **Staff Activity** form is opened, you are ready to enter a new staff member.
  - If the default query for selecting staff records is displayed, press **Cancel** to add a new record.



- Modify today's *Start Date*, if necessary.
- Type or lookup the *Default Activity Code* for the activity. The values you select will be added to each participant's activity record. You can modify individual participant detail records, or change this value after adding participants.
- Change *End Date* if different than *Start Date*.
- *Activity Description* defaults to the description associated with the *Activity Code*. You can modify *Activity Description* if necessary.
- Generally, incident related activities are added from the NFIRS incident or EMS incident report. Press **F1**, press **Click for related topics**, and follow the *Add Staff Activity to Incident* link for the steps to add an activity from an incident. To associate an activity with an incident outside the incident record:
  - Lookup **Incident-Related Activity** (*FDID*, *Alarm Date*, *Incident Number*) to associate this activity with an incident.

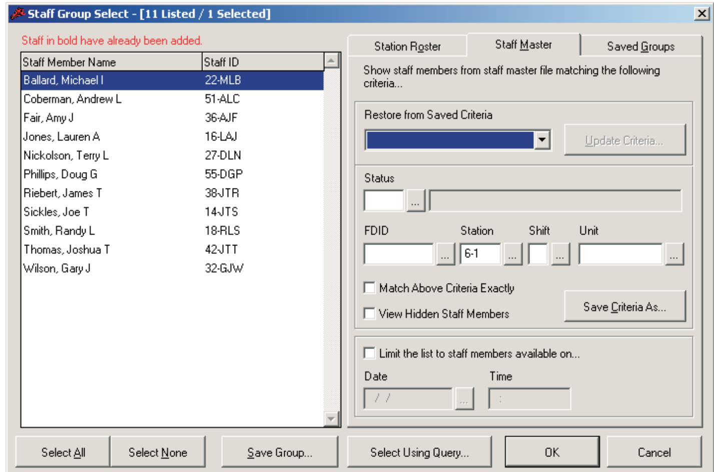
- Press either **NFIRS Incident Reports**, **EMS/Search & Rescue Incident Reports**, or **Dispatch/Remote Station Incident Reports**, highlight a record, then press **OK**.
- Check *Count this activity as part of incident response* to include staff added to this activity in incident counts.

- The values added to the **Default Values** area fields are added to each staff member record added for the activity. If necessary, you can edit the values for specific participant detail records.
  - Type or lookup the *Station*, *Shift*, *Unit* of staff members added to the activity. If most staff share a particular station, shift, or unit, add values to these fields. These fields can be left empty.
  - Type the number of *Hours Worked* for staff members added to the activity (can be different than hours paid). Note that depending on the activity, the *Hours Worked* value may be greater than zero even if the participant did not actually work, such as the instance of an activity for sick leave.
- Select at least one **Activity Type**:
  - Select any combination of *Fire*, *Rescue*, *Medical*, *Other* depending on the type(s) that best describe the activity. Note that the selection will be used in reports to determine incident type counts.
  - Check *Attendance Required* if appropriate.
- Enter default participant payroll values in the **Payroll Calculation** area.
- To add one staff member, press **Add**. The **Participant Detail** form is displayed.
  - Type or lookup the staff member to add to the staff activity in *Staff ID*. Other values in this form are brought in from the **Staff Activity** form when available. Fields can be modified as necessary.
  - Press **New** to add an additional participant detail, or save and close detail record.
- To add multiple staff to an activity at a time, press **Add Group** then select **Staff Group Select...**. Staff members available to add to the staff activity are displayed in the left. Listed staff member records are not modified in any way from the **Staff Group Select** form.

NOTICE
Select Methods

Specify which **Staff Group Select** form section to display in the **Administrative Options** form *Staff* section. The *Staff Master* section is the default section.

- If the **Staff Group Select** form *Staff Master* section is displayed:



  - Add specific *Status*, *FDID*, *Station*, *Shift*, *Unit* values. When the value is included in the staff member record, the staff member is listed (unless the staff member record is designated as hidden). By default, the staff member is included in the list if the corresponding field in the staff member's record is blank.
  - If you have a saved set of criteria, select the set from the *Restore from Saved Criteria* drop down field and the values for each field saved with the set are applied. Save *Status*, *FDID*, *Station*, *Shift* and *Unit* field values as a set by pressing **Save Criteria As**. When you wish to modify the set, change the values in the appropriate fields and press **Update Criteria** to modify the saved criteria.
  - Check *Match Criteria Exactly* to include staff in the list only if the values you specify exactly match the corresponding fields in the staff member record. If a criteria field has a value and the corresponding field in the staff member's record is blank, the staff member is not listed.
  - Check *View Hidden Staff Members* to display staff members that are designated as hidden.

A staff member record is designated as hidden from the **Staff Member** form, *Other* section. Hiding a staff member helps prevent accidentally adding a staff member no longer with the department to staff activities while maintaining staff history records for the staff member.

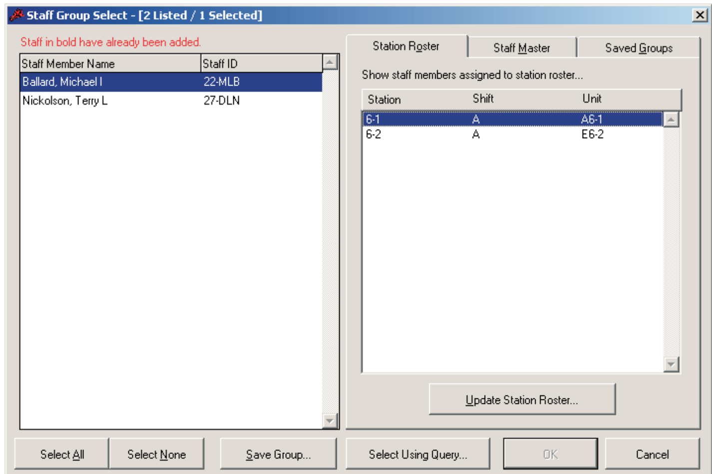
  - Check *Limit the list of staff members available on* and specify a date and/or time to use as criteria for listing staff. If a staff member has a specific availability record indicating that the staff member is NOT available at the entered date and/or time, they will be excluded. Staff members without availability records are listed when they meet other criteria regardless of the date and/or time unless *Match Criteria Exactly* is checked.

NOTICE
Update Criteria

Before selecting displayed list of staff to activity, be sure to press **Update Criteria** if you want changed criteria to be available when the criteria is next used. If you want the specific list displayed to be available as a group, press *Save Group As* and specify a group name that will be available from the **Staff Groups Select** form *Saved Groups* section. Saved groups are listed in the *Saved Groups* section.

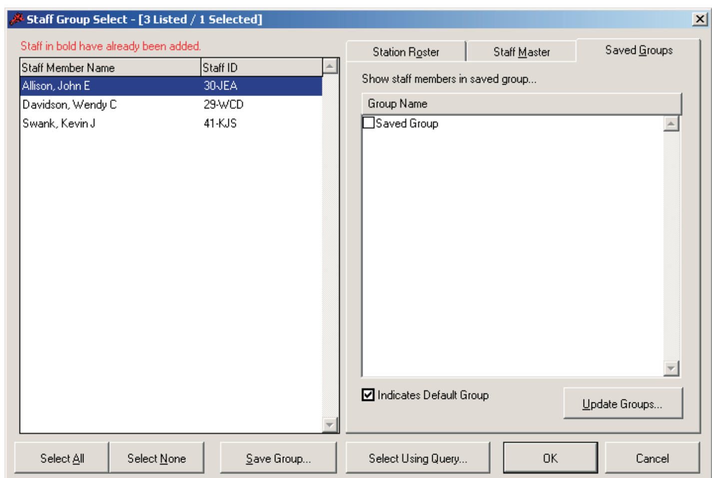
- Select staff to add to activity. Select multiple staff by pressing **Ctrl** while selecting. A staff member is selected when the name is highlighted. Press **OK** to add selected staff to the activity.

- If the **Staff Group Select** form *Station Roster* section is displayed:



  - Select the *Station/Shift/Unit* and corresponding staff are listed.
  - Select staff to add to activity. Select multiple staff by pressing **Ctrl** while selecting. A staff member is selected when the name is highlighted. Press **OK** to add selected staff to the activity.

- If the **Staff Group Select** form *Saved Group* section is displayed:



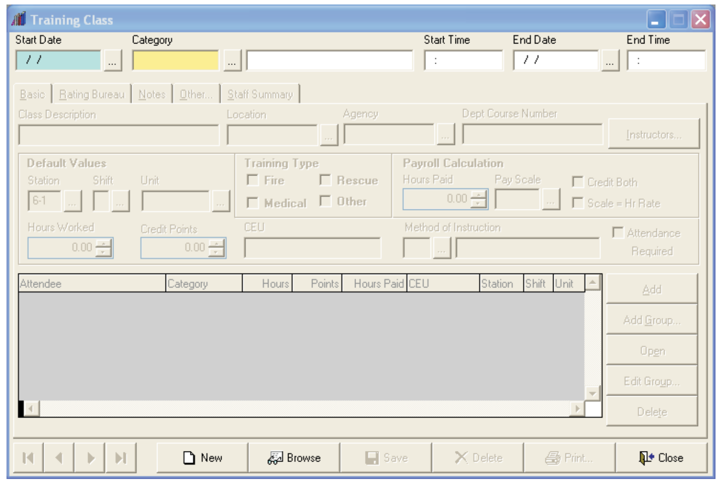
  - Select group and corresponding staff are listed.
  - Select staff to add to activity. Select multiple staff by pressing **Ctrl** while selecting. A staff member is selected when the name is highlighted. Press **OK** to add selected staff to the activity.

- Change activity details on the **Staff Activity - Group Add** form as necessary.
- Press **OK** to add participant details for selected staff members with the values you specify.

Complete remaining fields as needed. Press **F1** for more information.

To Add Training Class

- From the **File** menu, select the **Training Classes** option.
    - If the **Training Class** form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record.
    - If a blank **Training Class** form is opened, you are ready to enter a new record.
    - If the **Query** form is displayed, press **Cancel** to add a new record.



Complete remaining fields as needed. Press **`F1`** and press **Using This Form** for more information.

Setting Up Training Programs

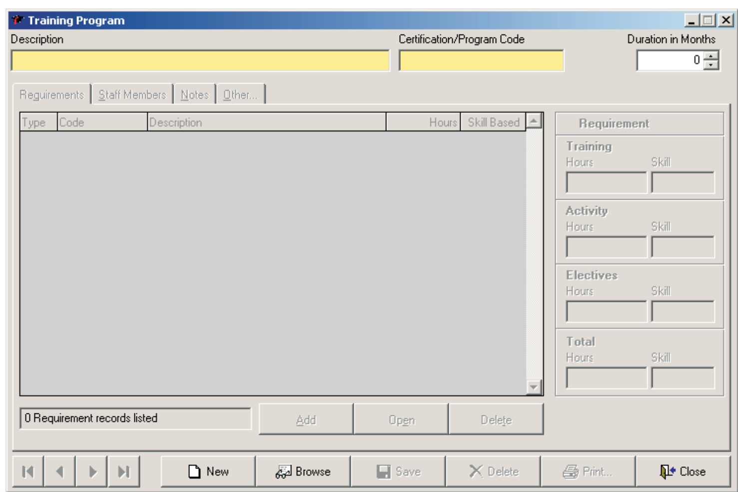
Training programs are set up as follows:

- Set up *Training Category* codes and *Staff Activity* codes for certification requirements.
- Add a training program, including:
    - training, activity, and elective requirements.
    - number of hours required for each training, activity, or elective (or check *Skills Based* to accept when objective is met regardless of hours).
    - staff members enrolled in the training program.

FH automatically tracks staff member training and staff activities. When a training activity record with the required training category code and the staff member is added to FH, the number of hours credited for the class is automatically subtracted from the corresponding required time in the training program. When the staff member has taken the number of hours (or more) in the training category required in the training program, they are recorded as having satisfied this particular requirement. The same is true when a staff activity record for a staff member enrolled in a training program is added using the staff activity code set up as a training program requirement. When a training activity record with a training category code within a training category code group added as an elective and the staff member is added to FH, the number of hours credited for the class is automatically subtracted from the corresponding required time in the training program. Note that if a specific training category is required for a training program AND the training category is in a training category group added as an elective, hours will be credited for the specific training requirement and the elective requirement.

To Add New Training Program

- From the **File** menu, select **Training Programs and Certifications** option **Training Programs** option.
  - If the **Training Program** form with the last modified record is opened, press **New** (or **`Ctrl + N`**).
  - If a blank **Training Program** form is opened, you are ready to add a new record.
  - If the **Query** form is displayed, press **Cancel**.



Complete remaining fields as needed. Press **F1** and press **Using This Form** for more information.

Staff Scheduling

The optional FH Staff Scheduling™ add-on module tracks staff shift scheduling. Integrates with other modules where staff records are added.

A staff schedule record includes base schedule information, shifts of on and off duty times, and staff members added for the shifts.

See the FH Staff Scheduling™ Installation Guide for more information on using this module.

Apparatus, Equipment, and Inventory

The Apparatus, Equipment, and Inventory module is available individually or as part of a bundled system.

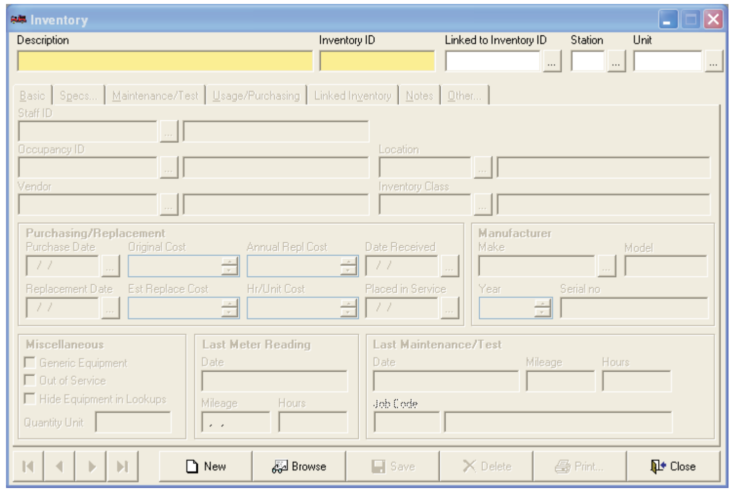
Apparatus, Equipment, and Inventory records track equipment information, maintenance activities, and usage.

Creating New Inventory Records

All apparatus, equipment, and inventory should be entered as individual records. If a piece of equipment is stored on apparatus and you need to track the testing or maintenance of the equipment, enter the equipment as an individual record then associate the equipment with the apparatus (which should be a separate record) by using the inventory ID of the apparatus in the *Link To Inventory ID* field.

To Add Master Inventory Record

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
    - If the **Inventory** form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record.
    - If a blank **Inventory** form is opened, you are ready to enter a new record.



  - If the **Query** form is displayed, press **Cancel** to add a new record.
- Type a *Description*. Add enough information to this field so that you can determine a particular piece of equipment from a list based on the information entered in this field. For example, describe the item, followed by the item's dimensions. A hose description might look like this: Hose, 4", 100'.
- Type an *Inventory ID*, or if autogenerate IDs is enabled in **Administrative Options**, press **`Tab`** to let the program assign an ID. *Inventory ID* is used throughout the system to identify specific piece of inventory.
- Optionally type a *Linked to Inventory ID* to link one piece of equipment with another. For example, a portable pump that is always stored on a particular attack vehicle. The *Linked to Inventory ID* field of the portable pump record should contain the attack vehicle's *Inventory ID*. Right-click and select from a list of valid IDs, or type the equipment ID of the apparatus that this item is on.
- Optionally type a *Unit* to ensure that equipment usage in incidents can be tracked for the inventory record. When a responding unit is added to an incident, the apparatus usage records of the apparatus associated with the unit is automatically updated.
- Optionally type or lookup the *Staff ID* for the member responsible for this apparatus or equipment if necessary (for example, the staff member the item was issued to).

Open the FH Help File and search for 'Staff Equipment' for more information on adding and reviewing staff equipment.

- Optionally type or look up a *Location* code. *Location* can be generic or specific to a specific apparatus. The location code is also used in generic equipment records. When adding location codes specific to a piece of apparatus, make sure that the locations are displayed in the order of a walk around the apparatus, so when you print the **Apparatus Inventory Checklist** report for the equipment record, you can efficiently check the inventory items as you walk around the vehicle.
- Optionally type or look up a *Vendor* code to associate a specific vendor with the apparatus and equipment.

Open the FH Help File and search for 'Vendor' for more information on adding vendor records.

- Type or lookup *Inventory Class* code that best describes the inventory record.
- Optionally specify purchasing/replacement information:

- *Annual Repl Cost* is the annual amount set aside to replace apparatus/equipment.
- *Date Received* is the date you took possession of the item.
- *Hr/Unit Cost* is the amount to run equipment (or unit cost for inventory items).
- *Placed in Service* is the date you put the item into service.

- Check appropriate **Miscellaneous** attributes:
  - Check *Generic Equipment* to identify the equipment record as generic. Since this is a master record, do not check *Generic Equipment*.

See 'To Add Generic Inventory Record' below for the steps to add generic equipment.

  - Check *Out of Service* to identify the equipment as out of service. 'Hidden' records are not displayed in equipment lookups. Units that are taken out of service should be hidden rather than deleted as you might need detail records for the out of service equipment.
  - Check *Hide Equipment in Lookups* to mark this equipment as hidden. Queries that display equipment records can be modified so they exclude equipment marked as hidden.
  - Specify the *Quantity Unit* indicating the unit of measure associated with the inventory (for example, 'Quarts'). This value is displayed after *Quantity* fields in usage detail records.
- *Last Meter Reading* fields and *Last Maintenance/Test* fields are displayed for reference purposes.

Complete remaining fields as needed. Press **F1** and press **Using This Form** for more information.

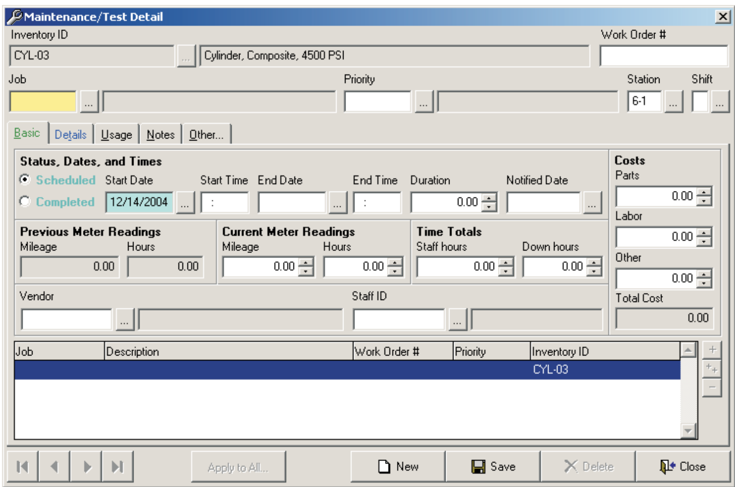
Tracking Inventory Maintenance

Maintenance records can be added as they are scheduled, or after they have been performed. Scheduled maintenance adds a scheduled maintenance record to the **Maintenance** area of the *Maintenance/Test* section if you specify number of days for interval, and check *Auto-Create Future Maintenance Records for this Job*. Auto-Create is available any time a value is entered in the *Number of Days* field, but we recommend that you do not automatically schedule critical maintenance items using this feature. Instead, add critical maintenance records from the **Maintenance** area.

You can automatically display daily reminders that include equipment due for maintenance and scheduled maintenance records when you access FH. Access the **FH Help File** and search for 'Daily Reminders' then select the *View Daily Reminders* topic for more information.

To Add Maintenance/Test Records

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or **`Ctrl + O`**), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.
- Click the *Maintenance/Test* tab.
- Press **Add**. The **Maintenance/Test Detail** form is displayed.



NOTICE
Batch Maintenance

If you are testing or maintaining multiple pieces of equipment at the same time, use "Batch Maintenance" from the **File** menu, select **Apparatus Equipment and Inventory**, then **Batch Maintenance/Test Entry**. You can add similar testing or maintenance records to all relevant apparatus records.

See the **FH Help File** "Batch Maintenance" topic for details.

- Type the *Work Order #* assigned for the maintenance/testing.
- Type or lookup the *Job* code used to categorize the maintenance or testing type.
- Select *Scheduled* and enter the *Start Date* if this maintenance/test detail has not been completed. Select *Completed* and enter the date the maintenance/detail record was completed in *Start Date*.
- Type the number of *Staff Hrs* spent for this maintenance/testing.
- Type the number of hours the equipment was unavailable due to the maintenance/testing in *Hrs Down*.
- Type the dollar amount spent for *Parts*.
- Type the dollar amount spent for *Labor*.
- Type or lookup the *Staff ID* for staff performing the test/maintenance.

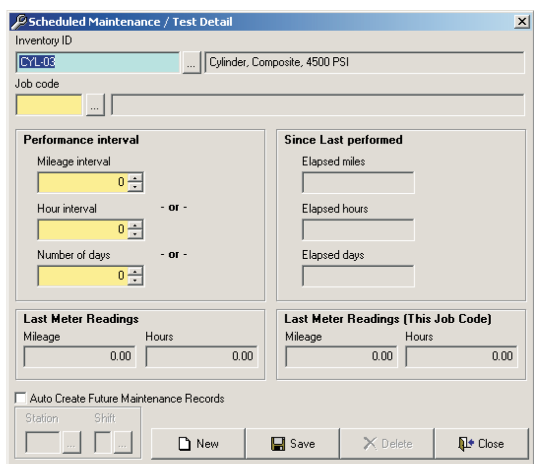
NOTICE
Track Staff Hours

Add a staff activity record for the staff member from the *Other* section if you want to track staff hours performing maintenance/testing.

- To add additional related jobs, press **+** to add one or **++** to add multiple additional records.
- Available fields in the *Details* section vary depending on the inventory type. “Pump”, “Hose”, and “SCBA” inventory types include specialized values in this section.
- Track the use of consumables used for this maintenance/test in the *Usage* section.
- Type additional information about the maintenance/test in the *Notes* section.
- Add user fields, add attached files, access record modification history, and add staff activities for this maintenance/test in the *Other* section.
- Save and close maintenance/test detail record.
- Save and close inventory record.

To Add Scheduled Maintenance

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or `Ctrl + O`), select record, and press **OK**.
  - If the **Query** form is displayed, select record and press **OK**.
- Click the *Maintenance/Test* tab.
- Press **Add** located below the **Scheduled Maintenance** area to schedule maintenance or testing. The **Scheduled Maintenance/Test Detail** form is displayed. Maintenance records added to the **Scheduled Maintenance** section do not create maintenance records in the **Maintenance** section. You must run a report to identify when a scheduled maintenance record is due.



- Type or lookup the *Job Code* for the maintenance or testing.
- Enter **Performance Interval** values:
  - If you enter a value in *Mileage Interval*, the maintenance/testing indicates that maintenance is due every time the number of miles specified elapses.
  - If you enter a value in *Hour Interval*, the maintenance/testing is scheduled every time the number of hours specified elapses.
  - If you enter a value in *Number of Days*, the maintenance/testing is scheduled every time the number of days specified elapses.

- Select *Auto-Create Future Maintenance* to schedule future records based on the usage. This option is only available if a value is entered in *Number of Days*.

NOTICE
Critical Maintenance

Do not rely on auto-scheduled maintenance/testing for critical items that must be tested at a precise interval if intervals other than days are used. If values other than days are used, maintenance may actually be due for maintenance before the date in the scheduled maintenance record, depending on usage.

- Press **Save**.
  - If *Auto-Create Future Maintenance* is checked, the **Define Auto-Maintenance Parameters** form is displayed. Add information about maintenance records then press **OK**.
- Press **Close**.
- Save and close inventory record.

To Run Maintenance Due Report

- Select the **Reports** menu **Apparatus, Equipment, & Inventory Reports**.
- Select the **Apparatus & Equipment Maintenance Reports** category *Equipment Due for Scheduled Maintenance* report.
- Press **Run**.
- Select output, then press **OK**.
- Complete query parameter values to limit included records, or leave as is and press **Run Query** to list all records.

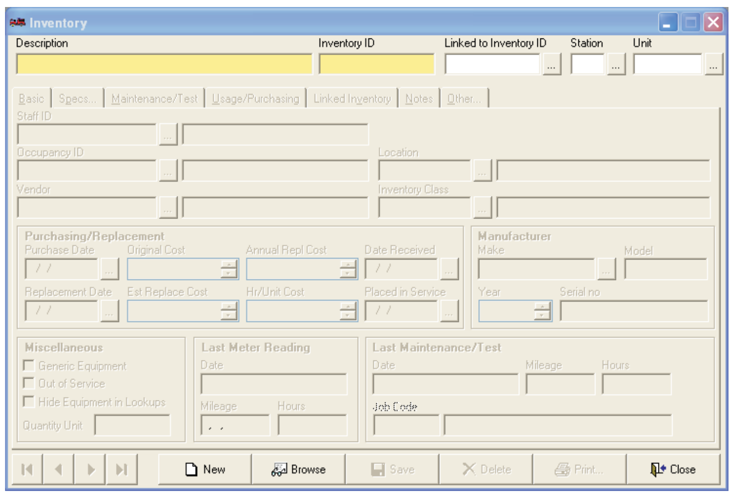
About Generic Equipment

Generic equipment is a class or group of equipment that is usually not kept in the same location and is not specifically tested. Items that are kept in one location or that require test and maintenance details should not be added as generic equipment. Once you have added the generic equipment record (entered as a standard inventory record with *Generic Equipment* checked) you can add this generic equipment to the inventory record that the generic equipment is located on.

If you have set up *Equipment Location* lookup codes specifically for the primary apparatus, and run the **Apparatus Inventory Checklist** report, all generic equipment and equipment linked to the main apparatus will be listed by the equipment location. Note that for this to work properly, you should set up the equipment location codes so they are sorted as the locations would be situated during an inventory check (that is, walk from one location to the next).

To Add Generic Inventory Record

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form with the last modified record is opened, press **New** (or **`Ctrl + N`**) to add a new record.
  - If a blank **Inventory** form is opened, you are ready to enter a new record.
  - If the **Query** form is displayed, press **Cancel** to add a new record.



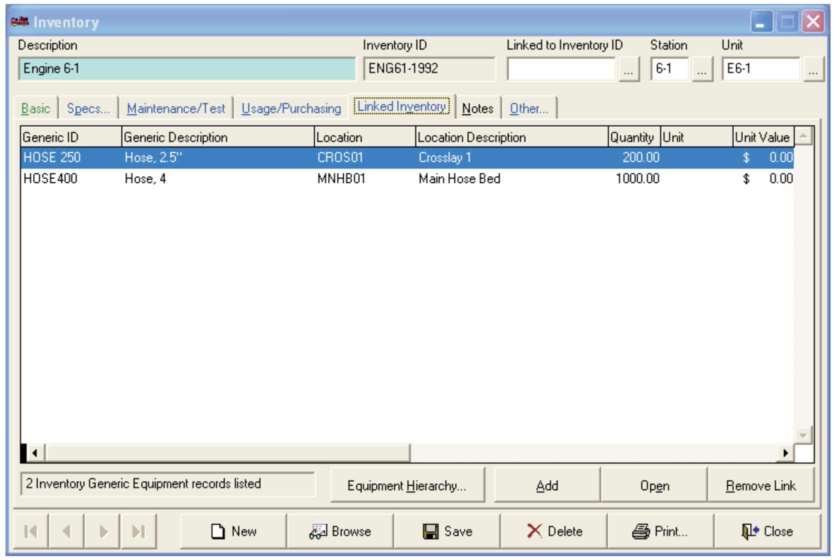
- Type a *Description*. Add enough information to this field so that you can determine a particular piece of apparatus from a list based on the information entered in this field. For example, describe the item, followed by the item's dimensions. A hose description might look like this: Hose, 4", 100'.
- Type an *Inventory ID*, or if autogenerate IDs is enabled in **Administrative Options**, press **`Tab`** to let the program assign an ID. *Inventory ID* is used throughout the system to identify specific piece of inventory.
- Check *Generic Equipment*. Generic equipment is added to master inventory records from the *Linked Inventory* section.

Complete remaining fields as needed.

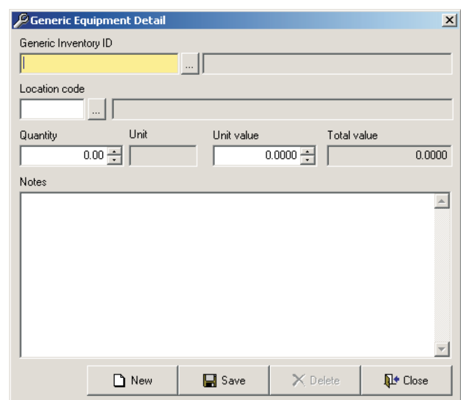
To Link Generic Equipment To Inventory Record

- From the **File** menu, select the **Apparatus, Equipment, and Inventory** option **Apparatus, Equipment, and Inventory Master Records** option.
  - If the **Inventory** form is displayed press **Browse** (or **`Ctrl + O`**), select the record that the generic equipment will be added to, and press **OK**.

- If the **Query** form is displayed, select the record that the generic equipment will be added to and press **OK**.



- Click the *Linked Inventory* tab.
- Press **Add**. The **Generic Equipment Detail** form is displayed.
- Type or lookup the equipment number for the generic equipment you wish to add to the current equipment record in *Generic Inventory ID*. When you perform a lookup a list of inventory records marked as "Generic Equipment" is displayed.



- Type or lookup the *Location Code*.
- Type the number of generic equipment items in *Quantity*.
- Type the value of the generic equipment in *Unit* value. The total value (*Quantity* times *Unit Value*) is displayed in *Total value*.
- Type notes on the generic equipment detail record.
- Save and close **Generic Equipment Detail** form.
- Save and close the **Inventory** form.

Hydrant Management

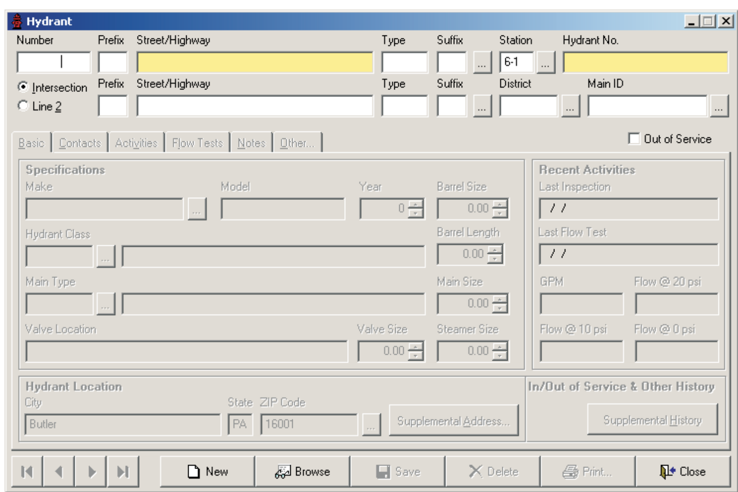
Hydrant Management is available individually or as part of a bundled system.

Maintain complete records of hydrants and hydrant-related activities.

Hydrant records include basic hydrant information like make, owner, and capacity, and provides a central are for tracking hydrant activities like inspections, repairs, and flow tests.

To Add New Hydrant Record

- From the **File** menu, select the **Hydrant Management** option **Hydrant Master Records** option.
  - If the **Hydrant** form is displayed, press **New** (or **`Ctrl + N`**) to add a new record.
  - If the **Query** form is displayed, press **Cancel** to add a new record.



- Type or lookup the *Number*, *Prefix*, *Street/Highway* and *Type*.
- Type the *Hydrant No.* that uniquely identify the hydrant.
- Complete hydrant **Specifications** area values as needed:
  - Type or lookup the *Hydrant Class*. Use the *Class* code to specify available types of hydrant records.
  - Type or lookup the *Main Type* the hydrant is connected to.

Complete remaining fields as needed. Press **F1** and press **Using This Form** for more information.

Accounts Receivable (Cost Recovery)

The optional FH Accounts Receivable™ add-on module is for tracking billing events generated from billable event records located throughout FH.

The FH Accounts Receivable module maintains a record of money owed to your department. There are three important parts of FH Accounts Receivable:

- Account records.
- Invoice records.
- Payments/credit records.

Account records include information about the entity owing money to your department, including basic contact information and a record of all money owed and money payed by the account.

Invoice records details the amount of money owed to your department. All invoices relate to a specific account record.

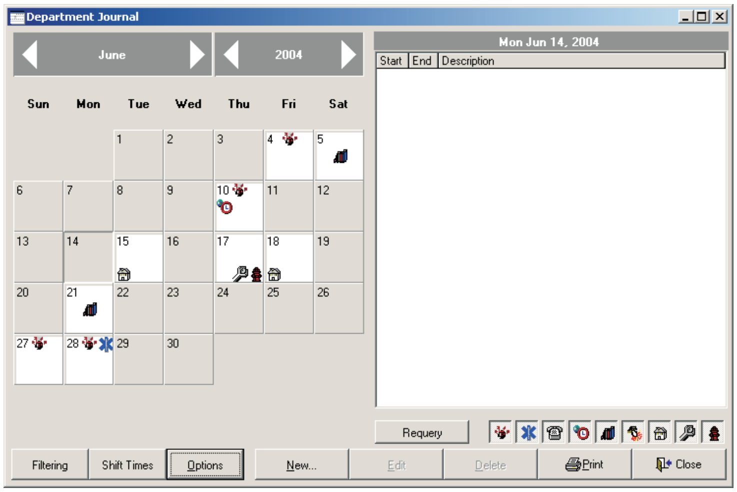
Payments and credit adjustments are entered and applied to an “account”. When a payment is received, the account ID is entered and all open invoices for that account are displayed. Payment can be applied to one or multiple open invoices.

After adding account records and setting up lookups (all detailed in chapter 2) you simply use FH as you would normally, adding occupancy inspections, hydrant activities, incidents, etc. Invoices can be generated as activities are added or, when relationships between account records and specific records have been set up, can be generated via the batch generate invoices feature. Once invoices are created, they are printed and sent to the account contact. When payments are received, apply the payments to the account. Reports are available at every step.

See the FH Accounts Receivable™ Installation Guide for more information on using this module.

Department Journal

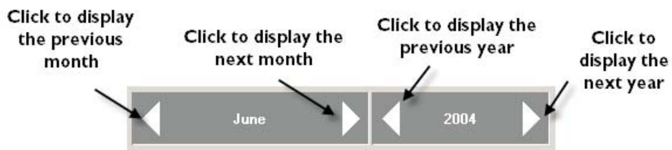
The Department Journal is the central command system that graphically displays all of your department events on a calendar. Displayed events include department events, fire and medical incidents, occupancy activities, equipment maintenance/testing, training classes, non-incident activities, and hydrant flow tests/repairs.



About Event Display

You can specify what events will be displayed by browsing the month and year displayed or by selecting a specific date. When a specific date is selected, you go directly to the specified date without querying to display events for the month and year, so this is the recommended method when using the journal in a system with numerous records. You can also filter events by station(s), shift(s), or unit(s), limit events to specific shift time ranges, and select which records to include. Events added after the **Department Journal** form is displayed are not automatically added, but can be included by pressing **Requery**.

To Browse Month and Year



To View A Selected Date

- Select the **File** menu **Department Journal** option.
- Press **Options**, then select the **Select Date** option.

- Specify a *Select Date* value, or press **Calendar** and select a date then press **OK**.
- Press **OK**.
- Press **Close** if finished.

To Set Filtering

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Press **Filtering**. The **Filtering Options** form is displayed.

You can select more than one code for station, shift, and unit. See the FH Help File, access the Search tab, then type "Select Multiple Records".

  - Type or lookup *Station(s)* to include in department journal.
  - Type or lookup *Shift(s)* to include in department journal.
  - Type of lookup *Unit(s)* to include in department journal.
  - Check *Ignore items without Station, Shift, or Unit* to exclude events with blank *Station*, *Shift*, or *Unit* values (only events that have an explicit match in *Station*, *Shift*, or *Unit* are included).
- Press **Apply Filter** to apply entered values and view results.
- Press **Close** to close the **Filtering Options** form.
- Press **Close** if finished.

To Set Shift Times

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Press **Shift Times**. The **Shift Times** form is displayed.
- Type the *Shift Length* and *Start Time*.
- Press **Apply Filter** to apply entered values and view results.
- Press **Close** to close the **Shift Times** form.
- Press **Close** to close the **Department Journal** form.

To Specify Event Types to Display

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Select the event types to include in the journal. A specific event is selected when it is "pressed down" (like this):
  - Press  to include fire incident reports.

- Press to include EMS incident reports.
- Press to include dispatch/remote incident reports
- Press to include department events.
- Press to include training classes.
- Press to include non-incident activities.
- Press to include occupancy inspections and activities.
- Press to include inventory maintenance and test records.
- Press to include hydrant activities.

- Press **Close** to close the **Department Journal** form.

To Display Events Added After Department Journal Display

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Press **Requery**. Events added after the **Department Journal** was accessed are included in the calendar.
- Press **Close** to close the **Department Journal** form.

Opening and Editing Events From The Journal

You can view a displayed record directly from the department journal.

To Open Event from Journal

- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Double-click the text description for the event you want to display. The event is opened.
- Save and close event form when finished.
- Press **Close** to close the **Department Journal** form.

To Add New Records from Journal

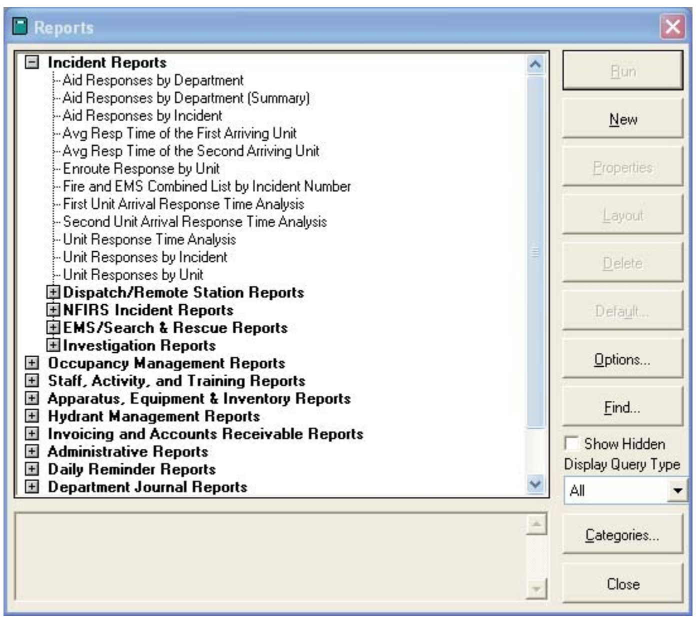
- Select the **File** menu **Department Journal** option. The current year's month is displayed with the current day highlighted. Events for the highlighted day are displayed to the right.
- Press **New** then select the entry type. Valid types:
  - Dispatch/Remote Station Incident Report.
  - NFIRS 5 Incident Report.
  - EMS/Search & Rescue Incident Report.
  - Incident investigation.
  - Department Event.
  - Training Class.
  - Staff Activity.
  - Occupancy.
  - Occupancy Inspection/Activity.
  - Apparatus, Equipment or Inventory Item.
  - Apparatus/Equipment Maintenance.
  - Inventory Usage.
  - Hydrant.
  - Hydrant Flow Test/Activity.
- When you select the type, the appropriate form is displayed, ready for data entry.
- Add information as needed, then save and close.
- Press **Close** to close the **Department Journal** form.

Printed Reports and Queries

Printed reports provide access to all of the data your department has entered. Shipped with over 300 preset reports, reports are available for reporting on a multitude of different situations. Printed reports are not limited to print, they can be viewed on the screen and output to a variety of different formats. Queries are used to browse FH records, and can be used to output FH data to a variety of formats.

To Run a Report

- From the **Reports** menu, select the area containing the report. The **Reports** form is displayed.

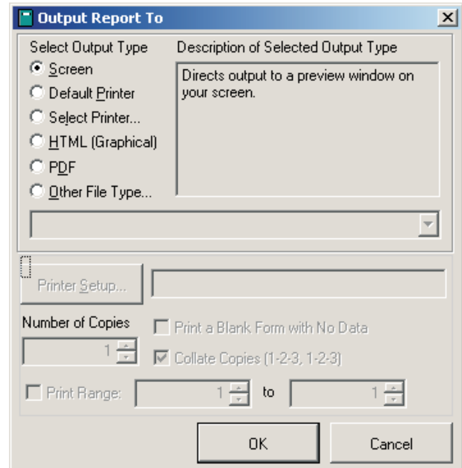


Incident Reports were selected in this example. You can open any report categories or press **Find...** to search for a report by name.

NOTICE
Favorites

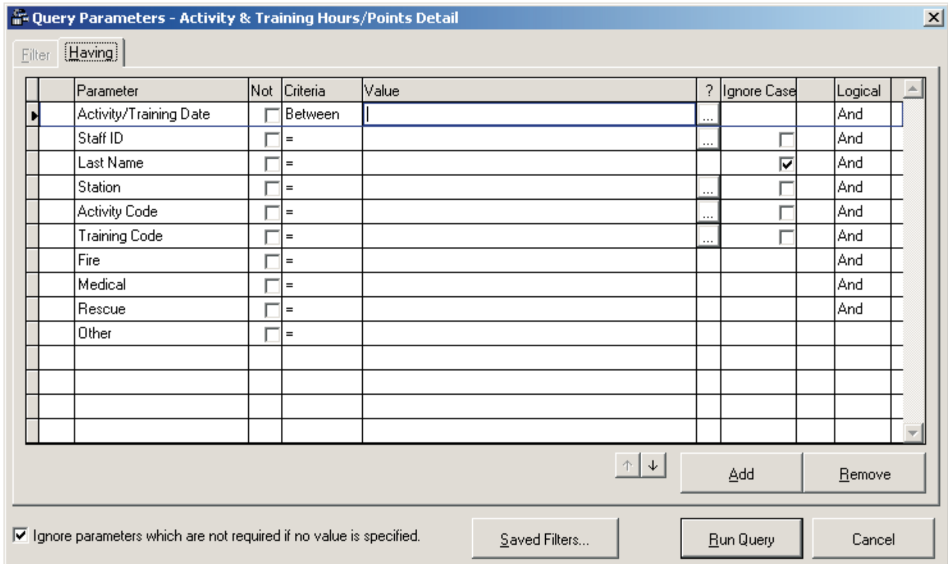
Add frequently run reports to your report shortcuts to save time. If you are not sure where to look for a specific report, try the search feature. Press **Find**.

- Highlight the report, then press **Run**. The **Output Report To** form is displayed.
- Select an output format.



  - Select *Screen* if you want to preview the report before printing.
  - Select *Default Printer* to use the printer set up as the workstation default. If you need to change default printer settings press **Printer Setup** at the bottom of the form and select the printer to use as the default printer for all Windows applications.
  - Select *Select Printer* to specify a printer to direct the report to a printer other than the default without changing the default printer.
  - Select *HTML (Graphical)* to output the report in HTML format. HTML files can be viewed and printed by many software programs (all internet browsers and many text editing programs).
  - Select *PDF* to output the report in a PDF format. PDF files can be viewed and printed by Adobe® Reader®, free software available from Adobe.
  - Select *Other File Type* and select from external data formats like Excel compatible spreadsheet (only available when output results in formatted tables).
- Press **OK**.
  - If the report does not include any filters, the report is output as specified.

- If the report includes user-specified filters, the **Query Parameters** form is displayed.



An example of the **Query Parameters** form.

- For each listed parameter, you can specify criteria (for example, equal to, less than, etc.), and enter a value. Leaving a parameter without a specified value includes all available records (that is, all possible records are included).

NOTICE
Parameters

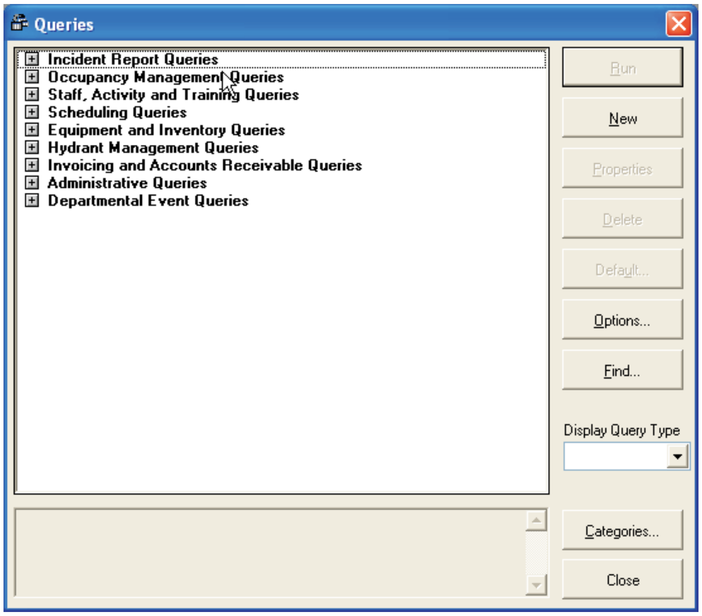
You generally will not need to modify the parameters. Check *Not* to include records that do not have the value specified in the *Value* field. Lookup values, if available, can be displayed by pressing in the *?* field. Check *Case* to ignore capitalization of the parameter value. Specify "And" or "Or" in *Logical*. "And" is most common, "Or" will result in values if either parameter values is present, "And" will exclude values if either parameter value is not present. In some instances, you can lookup the *Value*.

If the **Add** button is accessible, you can press **Add** to add additional parameters. If the *Having* section is accessible, you can add additional parameters. The difference between the *Filter* and *Having* section is the *Filter* section filters out data before it is included in the results table. The *Having* section filters out data that is included in the results table.

- Press **Run Query** to run the report and all records that match the specified criteria are displayed.

To Run a Query

- From the **Tools** menu, select the **Queries** option. The **Queries** form is displayed.



You can open any query categories or press **Find...** to search for a query by name.

- Highlight a query, then press **Run**.
  - If the report includes filters, the **Query Parameters** form is displayed. Enter parameter values then press **Run Query**.

  You can output queries to a printer or external file format, or copy the query results to the Windows clipboard to be pasted into an external program.

- To output to a report to a printer or external file format, press **Options** then select **Print or output to**. The **Output Report To** form is displayed.
  - Select an output format.
    - Select *Screen* if you want to preview the report before printing.
    - Select *Default Printer* to use the printer set up as the workstation default. If you need to change default printer settings press **Printer Setup** at the bottom of the form and select the printer to use as the default printer for all Windows applications.
    - Select *Select Printer* to specify a printer to direct the report to a printer other than the default without changing the default printer.
    - Select *HTML (Graphical)* to output the report in HTML format. HTML files can be viewed and printed by many software programs (all internet browsers and many text editing programs).
    - Select *PDF* to output the report in a PDF format. PDF files can be viewed and printed by Adobe® Reader®, free software available from Adobe.

  - Select *Other File Type* and select from external data formats like Excel compatible spreadsheet (only available when output results in formatted tables).
  - Press **OK**.
- Press **Close**.