

INVENTORY MODULE

VERSION 5.8

ADMINISTRATOR'S GUIDE

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CHAPTER 1

USING THE INVENTORY SYSTEM



1.1 Chapter Overview

This chapter explains how to work with sites, products and items in the Inventory module.

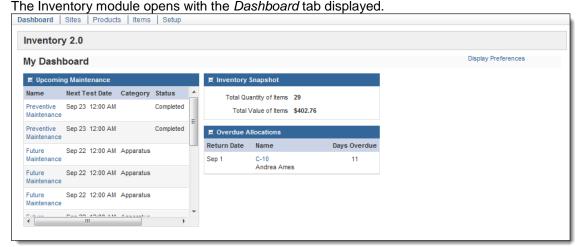
1.2 Introduction to ImageTrend's Inventory Module

The Inventory module allows you to keep track of a wealth of information about the items you keep in your agency. This can include the full specifications of each item, where it is located, any warranty information and more.

1.3 Configuring your Dashboard

The Dashboard is the page you will see when you first open the Inventory module. It gives you a snapshot of some of important information in your system. You can add "widgets" to the page to give you quick access to the information you want to see and access most often.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*.



- 3. To view a list of all elements that can be displayed, from the right side, click Display Preferences.
- 4. From the list that appears, to display a particular element, select the corresponding checkbox.
- 5. To hide an element that is currently displayed, deselect the corresponding checkbox.
- 6. When you are satisfied with the selected modules to display on the Dashboard, click Save.
- 7. When finished, to hide the list, click *Display Preferences* again.
- 8. To move elements, hover the mouse directly above the element's title until it becomes a four-sided arrow.
- 9. Click and drag the element to its new place on the page; all other elements will automatically move to accommodate the new layout.

1.4 Overview of Product Categories, Products and Items

Product categories, products and items are all interconnected within the Inventory system to help you keep track of your inventory. Understanding the way these work together and which is which will make your efforts easier.



Items are the individual things you enter into the system to keep track of; for example a specific hammer or the laptop assigned to Engine 5. Products are things that you can buy or stock items of, with specific attributes that will pertain to every item. For example, when you are adding computers to your inventory system, the 12.1" Panasonic Toughbook C1 would be a product. If you have five Toughbook C1 computers, each of those five computers would be an item. Products and items are similar but are entered separately, and you must have products set up before you have an item.

Product categories allow a way to organize your products, making them easier to find if you keep track of a lot of inventory. You can have multiple levels of categories, allowing you to make organization as specific as desired. For example, when you are adding your computers to the system, you could create a top level category of computers. If you decide that you would like people to be able to further narrow down the computers in the Inventory system, you could create sub-categories of desktop computers and laptop computers. Products are then added within the category that is most suitable, and items are added to the products.

1.5 Overview of Sites

Sites allow you to keep track of where items are. An individual site record keeps track of a particular location where something can be stored. You can have multiple levels of sites; this allows you to create a site record for every room within a building, or for every cabinet within a storage room. You can also have sites that are also items within your inventory system (such as a desk or an ambulance). It is up to your agency how many levels of sites you want to keep track of. A very detailed system could keep track down to the level of individual drawers in a cabinet, while a more relaxed system may only keep track of the rooms within the station. Sites can also be nested, to indicate when a site is contained within another site. For instance, this allows you to list a desk within the room it is placed in, and the room within its station.

Warehouse 10 Station 1 / Warehouse 10 Products Within This Site (1) Description Items Within This Site (1) Sites Within This Site (1) Documents (0) Site Details Name Warehouse 10 Parent Site Station 1 Inventory Type Only a site Active Yes Additional Comments Short Description Long Description Edit ← Back

Each site record will have several different tabs to organize the information about the site.

Description

The Description tab contains the overview information about the site, including its name, description and inventory type.

Products Within This Site

Each site can be set up with products that can be stored within it. This tab lists all products that can be stored in the site and allows you to add products from the system to this site.



Items Within This Site

All items that are recorded as being stored at this site will be listed in the *Items Within This Site* tab. Items are not added to the site here, but are added from their products.

Sites Within This Site

If there are additional sites that have been set up within this site, they will be listed in this tab. You can also add sites that should be within this one in this tab.

EXAMPLE: If your system has site records entered for a room and for each cabinet within that room, you could view the site records for each cabinet within this tab for the room's site record.

Documents

You can upload documents with more information to any site record, and those documents will be kept within the Documents tab. In addition, this tab will display any documents that have been added to the parent sites for this one (e.g., if a document was uploaded to a room site, that document would also be displayed in the site records for all cabinets in that room).

1.6 Viewing Sites

Once your sites are set up, you can view them from the system. Each individual site contains information about the sites, products and items contained within the site. By default, sites are displayed as a "tree," meaning that any sites nested within another site are hidden until you expand them. You can choose to either expand the tree or to view all sites as a list, which will no longer show the nesting.

Within each site record, several categories of information are contained. This includes information about products that can be contained within this site, items that are contained within the site, other sites that are nested under this site and any documents that are attached to the site record.

- Once you are logged in to the Fire Bridge system, if necessary, from the top left, click My Fire Department.
- Under the Modules tab, click Inventory 2.0.
 The Inventory module opens.
- 3. Select the Sites link.

The Sites page appears.

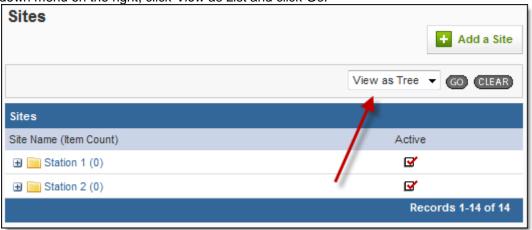


The next level of nested sites appears.

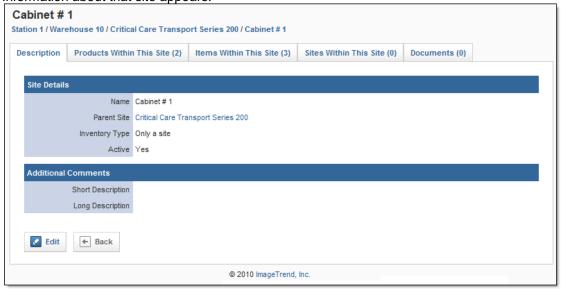


FINT: You can repeat this step as many times as you would like to view all the levels of sites.

5. **OPTIONAL:** To view all sites as a list without displaying the nesting information, from the drop down menu on the right, click *View as List* and click *Go.*



6. To view information about a particular site, click the name of that site. Information about that site appears.



7. To view information about products, items, sites or documents within this site, click the appropriate tab.

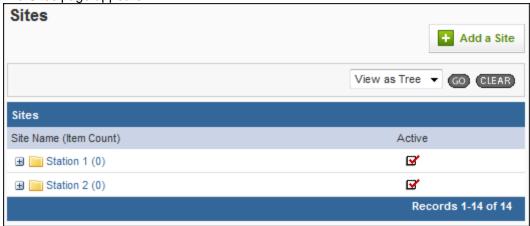


1.7 Adding a Site

You can add a new site as needed to keep track of locations where items can be stored.

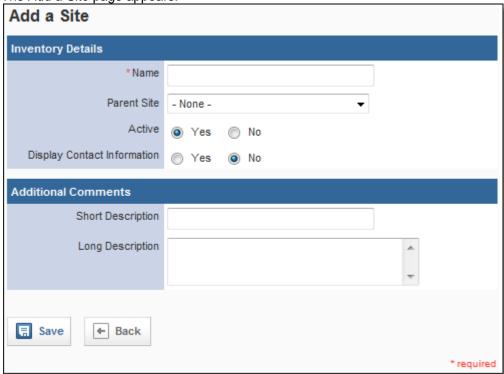
- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module opens.
- 3. Select the Sites link.

The Sites page appears.



4. Click Add a Site.

The Add a Site page appears.



- 5. In the Name text box, type an identifying name for the site,
- 6. **OPTIONAL:** If this site is contained within another site, from the *Parent Site* drop down menu, select the site containing this one.

- 7. In the *Active* section, select whether this site should currently be active and available for use in the system or inactive and stored in the system for reference only.
- 8. In the *Display Contact Information* section, select whether this is a site that can have contact information.
 - If Yes is selected, a Contact Information section appears.
- 9. If this site has contact information, in the *Contact Information* section, enter all known contact information for this site.
- 10. In the Additional Comments section, enter any desired descriptions for the site.
- 11. Click Save.

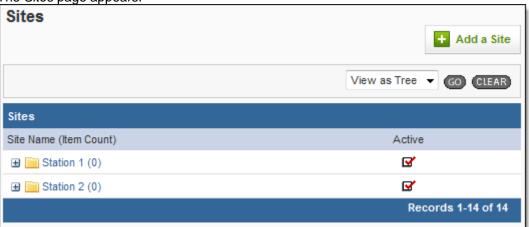
The site is saved and additional tabs appear.

1.8 Adding a Product to a Site

Adding a product to a site allows you to record items of that product that are stored within the site. The products must have already been created in the system before you can add them to the site. Products that are added to a site will not be added to the sites beneath this one (e.g., if you add a product to a room, it will not be added to the site records for the cabinets within the room).

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module opens.
- 3. Select the Sites link.

The Sites page appears.



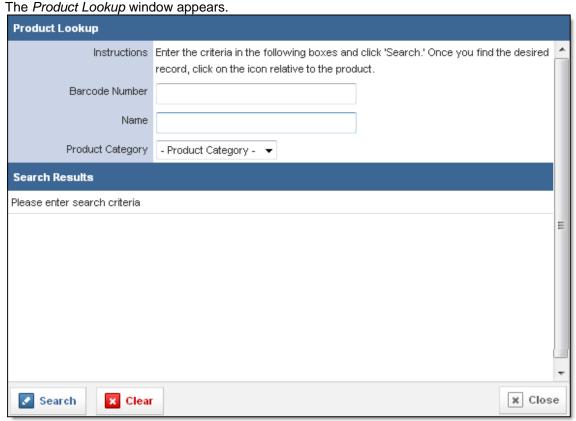
- Locate the desired site.
- 5. Click the name of the site to open it.
- 6. Select the Products Within This Site tab.

The Products Within This Site page appears.





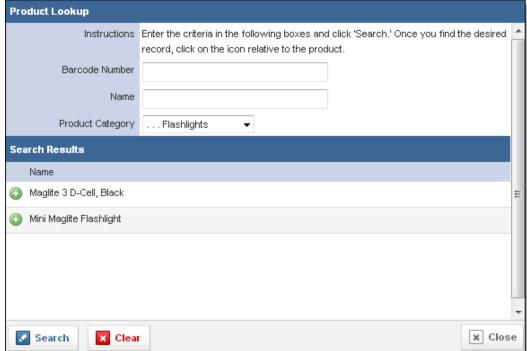
7. Click the *Add a Product To This Site* button.



- 8. Using the provided fields, enter any information you know about the product to search for it.

 HINT: If you want to view all products, leave the fields blank.
- 9. Click Search.

A list of all possible products matching your search criteria appears.



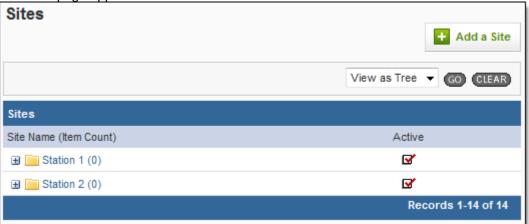
10. For the desired product, click the *Add* icon . The product is added.

1.9 Adding an Item to a Site

When you add items to the system from the *Items* tab, you can select the site at which they are stored. If you prefer, you can also access the option to add items to the system from a site.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module opens.
- 3. Select the Sites link.

The Sites page appears.

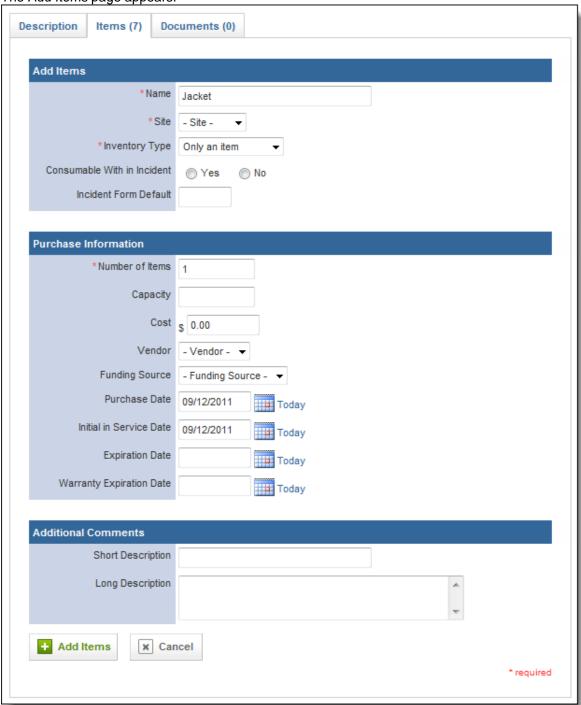


- 4. Locate the desired site.
- 5. Click the name of the site to open it.
- 6. Select the *Products Within This Site* tab. The *Products Within This Site* page appears.
- 7. Click the name of the desired product. The *Product Details* window appears.
- 8. Click the *View Product* button. The product's profile opens.
- 9. Click the *Items* tab.
 - A list of all items for that product appears.



10. Click Add Items.

The Add Items page appears.



- 11. **OPTIONAL:** If this item should have a name to distinguish it from other items for the same product, in the *Name* text box, type the extra information.
- 12. From the Site drop down menu, select the site at which this item is stored.
- 13. From the Inventory drop down menu, select whether this item should also be classified as a site.

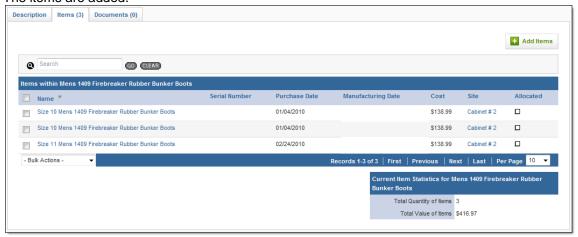
HINT: If you choose to classify this item as both an item and a site, a record will be created for it both as a site and as an item. Please keep in mind that most information is not shared between the site and item records; for example, if you add a document to the site record, it will not be reflected in the item record.

- 14. In the *Consumable within Incident* section, select whether this item can be used up within an incident.
 - NOTE: If you select Yes, this item will be included on run forms as a consumable.
- 15. **OPTIONAL:** If this item is a consumable, to assign a default number of this item that will be used on an incident, type the number in the *Incident Form Default* section.

EXAMPLE: If your crews nearly always use two pairs of gloves during an incident, you can type 2 in here. When the crew members select the site to record consumed items, 2 pairs of gloves will already be selected as a consumable.

- 16. In the Number of Items text box, type how many item records you would like to add at this time.
 - **HINT:** If you want to add multiple items for a single product with the same information, this can be very useful. However, keep in mind that if you will be entering serial numbers or other information that will be different for each item, you will either need to add each item separately or edit each item's record individually after creating them.
- 17. In the *Capacity* section, select the maximum amount that this site can hold. **EXAMPLE:** If each apparatus has one box of gloves containing 50 pairs, the capacity would be 50. Recording a capacity will not prevent you from assigning more than that number of an item to a site.
- 18. In the remaining fields in the *Purchase Information* section, enter all known information.
- 19. If applicable, in the *Custom Questions* section, answer all questions.
- 20. In the Additional Comments section, enter any additional information about this item.
- 21. Click Add Items.

The items are added.



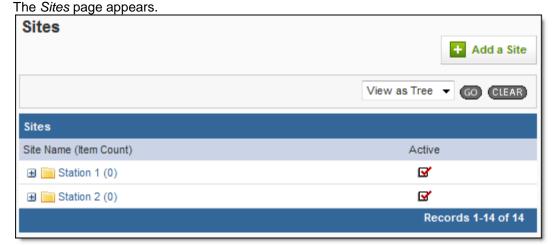
1.10 Adding a Site Within a Site

Sites can be added in several places. You can always add a site from the main *Sites* tab. However, if you are working with a single site and adding all the sites within it (for example, if you are working with the site record for a desk and want to add records for each of the drawers), you can add sites from the parent site profile.

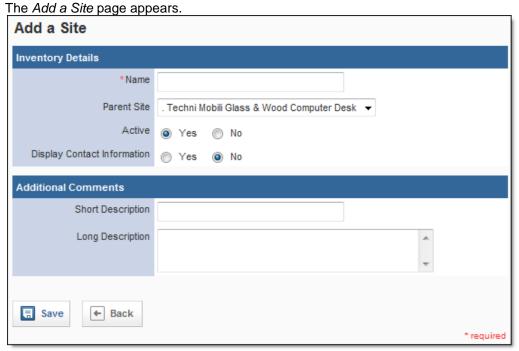
- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module opens.



3. Select the Sites link.



- 4. Locate the desired site.
- 5. Click the name of the site to open it.
- 6. Select the Sites Within This Site tab.
 - A list of all sites within the open site appears.
- 7. Click Add a Site Within This Site.



- 8. In the *Name* text box, type an identifying name for the site,
- 9. In the *Active* section, select whether this site should currently be active and available for use in the system or inactive and stored in the system for reference only.
- 10. In the *Display Contact Information* section, select whether this is a site that can have contact information.
 - If Yes is selected, a Contact Information section appears.
- 11. If this site has contact information, in the *Contact Information* section, enter all known contact information for this site.
- 12. In the Additional Comments section, enter any desired descriptions for the site.
- 13. Click Save.
 - The site is saved and additional tabs appear.



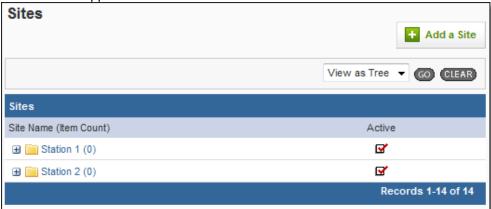
1.11 Adding a Document to a Site

If you have any documents that you would like to store with a site record, you can do so. This can be an easy way to keep track of any more details specifications, maintenance instructions, manuals or other important documents. Documents that are added to this site will also be displayed in sites within this site (e.g., if a document was uploaded to a room site, that document would also be displayed in the site records for all cabinets in that room).

For security, not all file types can be uploaded to the Inventory system.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- Under the Modules tab, click Inventory 2.0.
 The Inventory module appears.
- 3. Select the Sites link.

The Sites tab appears.



4. Click the Expand icons I for the sites until you locate the desired site.



- 5. Click the site name to open its profile.
- 6. Select the Documents tab.

The Documents tab appears.





7. Click Upload a Document.

The Upload a Document page appears.

Description Products Within This Site (0) Items Within This Site (0) Sites Within This Site (8) Documents (0)

Upload a document

*Name

Document Type - Document Type - V

*Upload

Browse...

*required

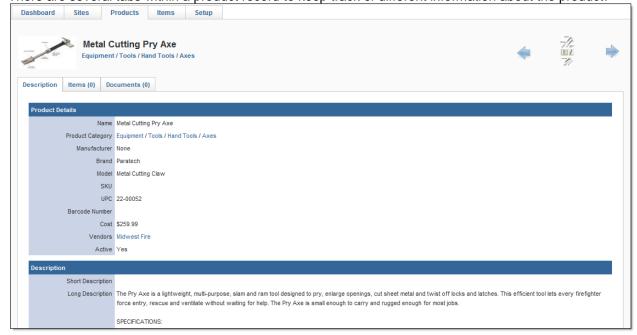
- 8. In the *Name* text box, type a name for this document.
- 9. From the Document Type drop down menu, select the type of document you are uploading.
- 10. In the *Upload* section, click *Browse...*
 - The Choose File dialog box appears.
- 11. Navigate to and select the document you want to upload.
- 12. Click Open.
 - The Choose File dialog box closes.
- 13. Click Upload.

The document is added to the record.

1.12 Overview of a Product

Products are things that you can buy or stock items of, with specific attributes that will pertain to every item. Product records should contain all information that will be the same for all the items created from this product this can include information about the manufacturer, brand and model, cost and vendors, as well as photos and a description. This information will then be automatically entered for each item created from this product.

There are several tabs within a product record to keep track of different information about the product.





Description

The *Description* tab contains the basic information you enter about the product when it is created and the majority of information that will be used to create items. This includes information about the name, brand and model, cost and other logistics of the product.

Items

The *Items* tab lists all items of this product that are in the system, as well as allowing you to add additional items.

Documents

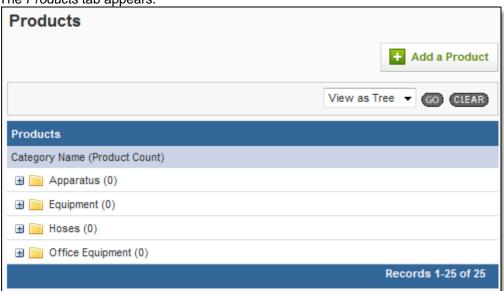
The *Documents* tab lists all documents that have been uploaded for this product and allows you to add new documents. This could include manuals, product specifications, assembly guides or other important documents that you would like to keep with the product information.

1.13 Viewing a Product Record

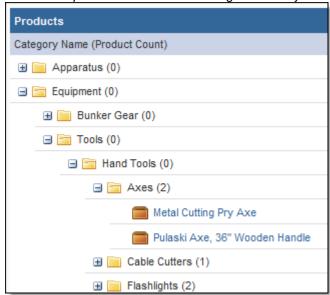
Products are organized based on their product categories. You can navigate through the categories to view the desired product record or you can search to find the desired record.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.
- 3. Select the *Products* link.

The Products tab appears.

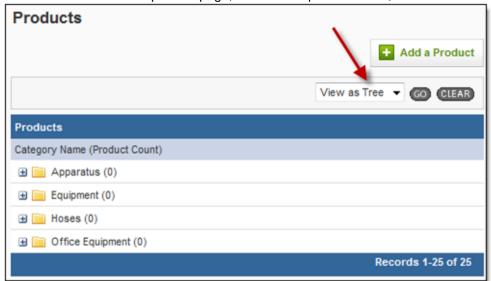


4. Click the *Expand* icons **III** for the categories until you locate the desired product.



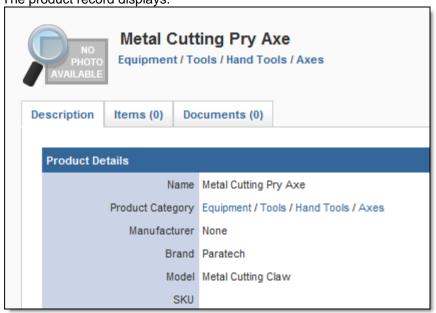
OR

a. From the header at the top of the page, from the drop down menu, select View as List.



- b. Click Go.
 - Al products appear in a list.
- c. Locate the desired product or use the *Search* text box to find the product.

5. Click the product name to open its profile. The product record displays.



Locating a Product Record with a Barcode Scanner

If you use barcode scanners, you can locate a product by scanning the product.

- Once you are logged in to the Fire Bridge system, if necessary, from the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.
- 3. Select the Products link.
- 4. Use the barcode scanner to scan the product or type the barcode in the *Barcode Search* text box and click *Go*.

The product record opens.





1.14 Adding a Product to the System

A product is a specific object that you can purchase a quantity of, with specific attributes that will pertain to every item. For example, a product could be the 12.1" Panasonic Toughbook C1 laptop. Each laptop you buy would be considered an item.

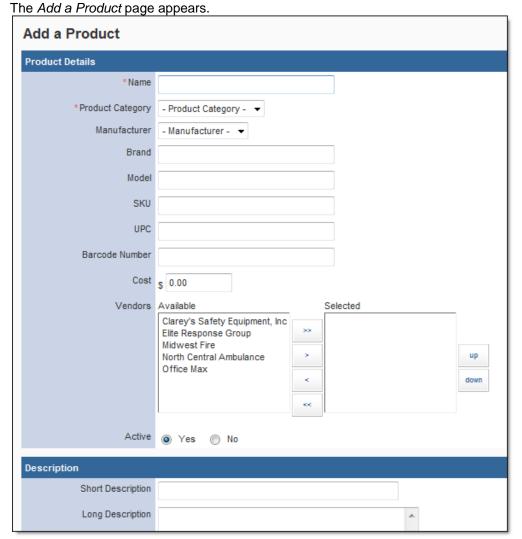
Products are divided into categories to help organize the many products your agency can record. When you add a product, you can define which category it should be classified under.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.
- 3. Select the *Products* link. The *Products* tab appears.





4. Click Add a Product.



5. In the *Name* text box, type a descriptive name for this product.

HINT: Make the name as descriptive as possible to avoid confusion. For example, if you have 3 different types of men's boots, be sure the name is specific enough that someone adding items for these products will know which product is which.

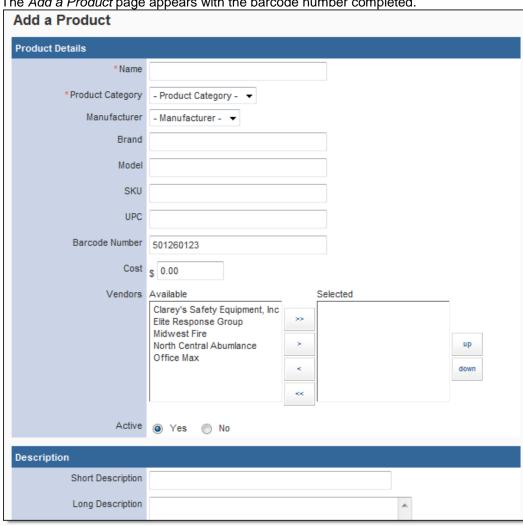
- From the Product Category drop down menu, select the category in which this product will be classified.
 - **HINT:** Depending on your agency's setup, product categories may be nested (e.g., there may be a category for boots under another category for apparel). In this case, place the product in the category that applies best to this product.
- 7. Using the remaining fields in the *Product Details* section, enter all known information about this product.
- 8. In the *Active* section, select whether this product should be active and available for use in the system, or inactive and available in the system only for reference.
- 9. In the *Description* section, enter any additional descriptive information about the product (e.g., dimensions or a short summary of the product).
- 10. When finished, from the bottom of the page, click *Save*. The product is added.

Adding a Product through a Barcode

If you are working with a barcode scanner, scanning a product that does not already have a product record in the system will automatically help you add a new product with the barcode already filled in.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click My Fire Department.
- 2. Under the Modules tab, click Inventory 2.0. The *Inventory* module appears.
- 3. Select the Products link.
- Use the barcode scanner to scan the new product or type the barcode in the Barcode Search text box and click Go.

The Add a Product page appears with the barcode number completed.



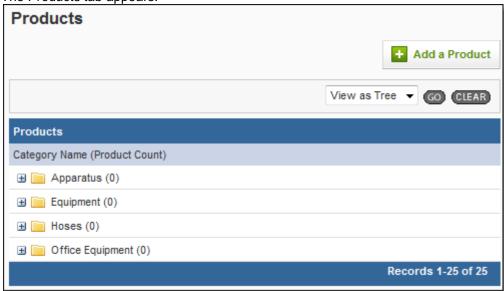
- Using the provided fields, complete the rest of the form for this product.
- When finished, from the bottom of the page, click Save. The product is added.

Adding Photos to a Product

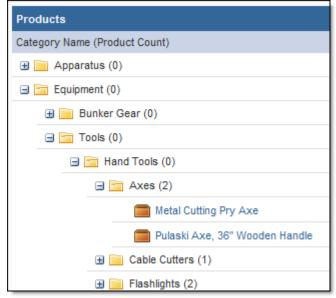
Each product can have a gallery of photos to make it easy to identify. You can upload these photos and select one photo to be the primary picture for the product.



- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.
- 3. Select the *Products* link. The *Products* tab appears.



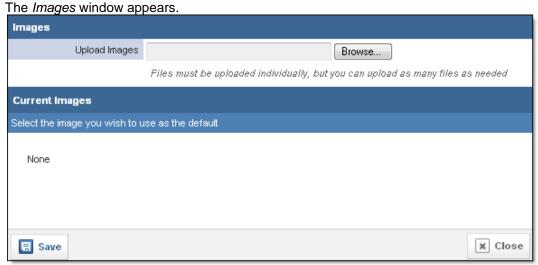
4. Click the *Expand* icons **■** for the categories until you locate the desired product.



Click the product name to open its profile. The product record displays.



Click the No Photo Available icon or the product's photo.



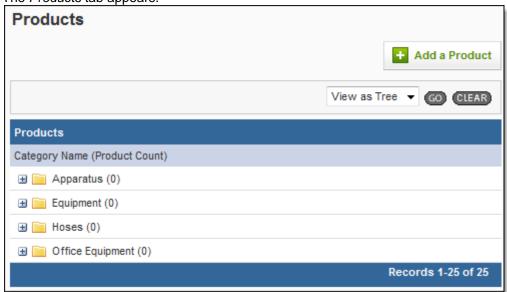
- 7. In the Upload Images section, click Browse...
 - The Choose File dialog box appears.
- 8. Navigate to and select the first image you want to upload.
- 9. Click Open.
- 10. Repeat steps 3–5 until all desired pictures are added.
- 11. Click Save.
 - The images are uploaded and added to the gallery for the product.
- 12. To select a photo to appear as the default photo on the product's information page,
 - a. Click the No Photo Available icon or the product's photo.
 - The *Images* window appears.
 - b. Click the photo you would like to appear as the default photo for this product. A red line appears around the photo.
 - c. Click Save.
 - The photo is applied.



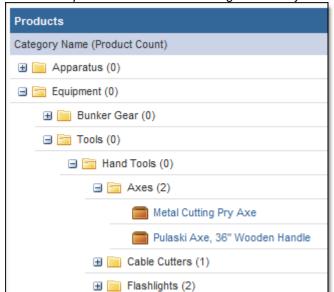
1.15 Editing a Product Record

If necessary, you can edit the record for a product.

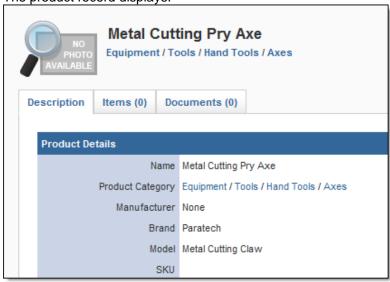
- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.
- 3. Select the *Products* link. The *Products* tab appears.



4. Click the *Expand* icons **■** for the categories until you locate the desired product.



5. Click the product name to open its profile. The product record displays.



- From the bottom of the Description page, click Edit.
 The fields become editable.
- 7. Make any desired changes.
- 8. From the bottom of the page, click Save.

1.16 Adding a Document to a Product

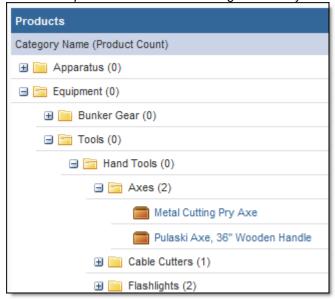
If you have any documents that you would like to store with a product record, you can do so. This can be an easy way to keep track of any more details specifications, maintenance instructions, manuals or other important documents.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.
- 3. Select the *Products* link. The *Products* tab appears.





4. Click the Expand icons I for the categories until you locate the desired product.



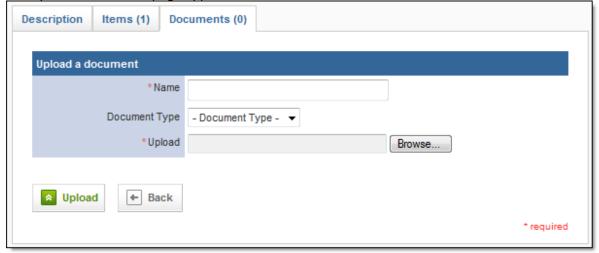
- 5. Click the product name to open its profile.
- 6. Select the Documents tab.

The Documents tab appears.



7. Click Upload a Document.

The Upload a Document page appears.

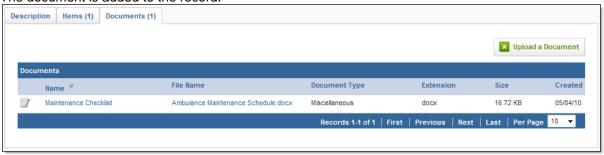


- 8. In the *Name* text box, type a name for this document.
- 9. From the *Document Type* drop down menu, select the type of document you are uploading.



- 10. In the *Upload* section, click *Browse...*
 - The Choose File dialog box appears.
- 11. Navigate to and select the document you want to upload.
- 12. Click Open.
 - The Choose File dialog box closes.
- 13. Click Upload.

The document is added to the record.

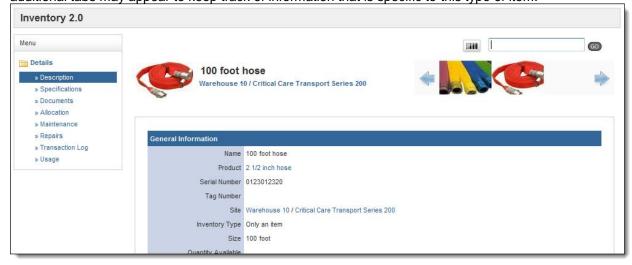


1.17 Overview of an Item

Items are individual things that you are keeping track of in the system, such as the phone at your desk or a specific pair of boots. Item records are created based on product records, which helps you to know exactly how many of a specific product you have and makes it easier to create item records for products that you may have multiple items for. Each item can also have a maintenance record, including records for each time maintenance was performed and any repairs done.

Items can also function as sites, if the item can store other items (for example, you may record your cabinets as items but also use the cabinets as sites that store tools). This is a setting specified when the item is first set up, and if an item is also a site it will have a separate item and site profile.

Item records have several tabs to keep track of different information. Depending on the item, some additional tabs may appear to keep track of information that is specific to this type of item.



Description

The *Description* tab keeps track of the basic details about the item, including its serial number, the site is stored at, any important dates and comments about this item.



Sites on Item

The *Sites on Item* tab will only appear if this item is also a site. If there are sites listed within this one, they will be listed in this tab. You can also add a site to this one from here.

Specifications

For certain types of products and items, additional specifications can be entered based on how that product is configured in your service. You can fill out this specification information from here.

Documents

The *Documents* tab lists all documents that have been uploaded for this item and allows you to add new documents. This could include manuals, product specifications, assembly guides or other important documents that you would like to keep with the product information. Documents that were uploaded for this item's product will also appear here.

Allocation

The *Allocation* tab lists all records for when this item was given to someone for use. You can also record a new allocation here.

Maintenance

The *Maintenance* tab lists all maintenance records for the item. You can also record a new maintenance record here.

Repairs

If any required repairs are indicated in maintenance records, those repairs will be documented in the *Repairs* tab. You can view and add repair records here.

Transaction Log

The *Transaction Log* tab records dates affecting this item, from warranty and purchase dates to allocation dates.

Usage

The *Usage* tab records information for consumable items. When a consumable item is recorded as being used in an incident, the record will appear here in the item profile. You can also add usage records in this tab.

Viewing Item Statistics

When you view items from the *Items* tab or a list of items for a product or site, you can view statistics about the items currently being displayed. This allows you to view the number of items and their total value. If you use a filter to view only specific items, the statistics displayed will only apply to those specific items.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.
- 3. As desired, open the *Items* page, the *Items* tab within the product record or the *Items Within This Site* tab within a site.



The appropriate Items page appears, with the statistical information displayed.

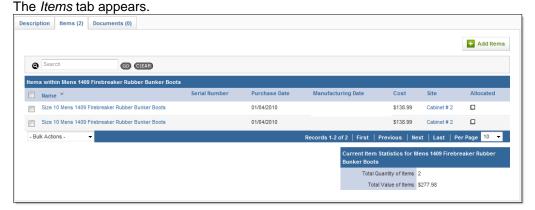
1.18 Adding an Item to the System

Each item must be associated with a product; you can add a new item directly from the associated product record or from the *Items* page.

Adding an Item from a Product Record

When adding an item from a product record, some of the item information will already be completed from the product.

1. Open the product record for type of item you want to add. Within the product record, click the *Items* tab.



2. Click Add Items.

The Add Items page appears.



- 3. **OPTIONAL:** If this item should have a name to distinguish it from other items for the same product, in the *Name* text box, type the extra information.
- 4. From the Site drop down menu, select the site at which this item is stored.
- 5. From the *Inventory Type* drop down menu, select whether this item should also be classified as a site.
 - HINT: If you choose to classify this item as both an item and a site, a record will be created for it both as a site and as an item. Please keep in mind that most information is not shared between the site and item records; for example, if you add a document to the site record, it will not be reflected in the item record.
- 6. In the Consumable Within Incident section, select whether this item is a consumable.
 - HINT: If you select Yes, this item will be available for crew members to select on run forms as being consumed.
- 7. To set up a default number that should be marked as being consumed on an incident form if this item is selected as being used, type the desired number in the *Incident Form*



Default text box.

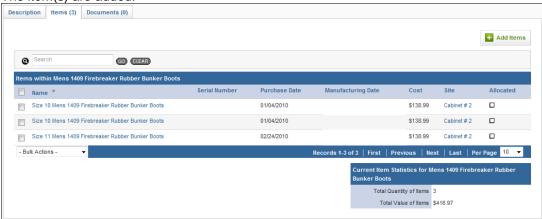
NOTE: This field is not applicable if this item is not a consumable.

8. In the *Number of Items* text box, type how many item records you would like to add at this time.

HINT: If you want to add multiple items for a single product with the same information, this can be very useful. However, keep in mind that if you will be entering serial numbers or other information that will be different for each item, you will either need to add each item separately or edit each item's record individually after creating them.

- 9. In the remaining fields in the *Purchase Information* section, enter all known information.
- 10. If applicable, in the Custom Questions section, answer all questions.
- 11. In the Additional Comments section, enter any additional information about this item.
- 12. Click Add Items.

The item(s) are added.

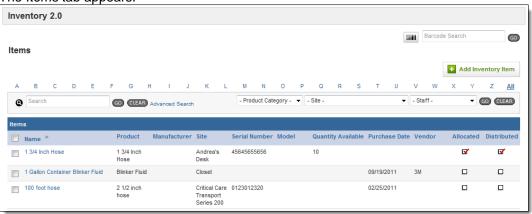


Adding an Item from the Items Page

When adding an item from the Items page, you will need to complete some product information.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.
- 3. Click the Items link.

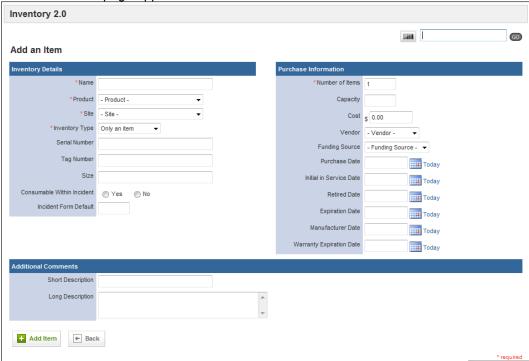
The *Items* tab appears.





4. Click Add an Inventory Item.
The Add an Item page appears.

Inventory 2.0

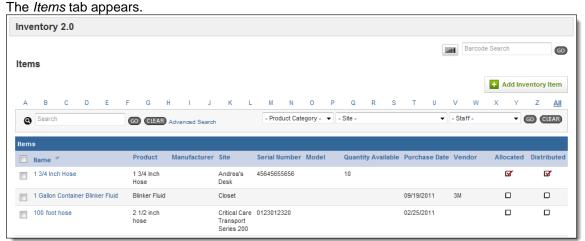


- 5. In the *Name* text box, type a unique name for this item.
- 6. From the *Product* drop down menu, select which product this item is.
- 7. From the Site drop down menu, select the site where this item is stored.
- 8. From the *Inventory Type* drop down menu, select whether this item is also a site.
- 9. In the Serial Number, Tag Number and Size text boxes, type all appropriate information that your agency wants to track.
- 10. In the Consumable Within Incident section, select whether this item is a consumable.
 - **HINT:** If you select *Yes*, this item will be available for crew members to select on run forms as being consumed.
- 11. To set up a default number that should be marked as being consumed on an incident form if this item is selected as being used, type the desired number in the *Incident Form Default* text box.
 - NOTE: This field is not applicable if this item is not a consumable.
- 12. In the *Number of Items* text box, type how many item records you would like to add at this time.
 - HINT: If you want to add multiple items for a single product with the same information, this can be very useful. However, keep in mind that if you will be entering serial numbers or other information that will be different for each item, you will either need to add each item separately or edit each item's record individually after creating them.
- 13. In the Capacity box, type the number of items that normally come in a package.
- 14. In the remaining fields in the *Purchase Information* section, type as much information as your service would like to track for this item.
- 15. In the Additional Comments section, enter any descriptive information about the item(s).
- 16. Click Add Item.
 - The item record is saved and the full item profile appears.

1.19 Copying an Item

If you have many items that should all have the same information, you can copy an item profile to create more item records. If you choose to do this, allocation information, documents and information about sites within the item will not be copied. The new item will be named *Copy of (Original Item Name)*.

- Once you are logged in to the Fire Bridge system, if necessary, from the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.
- 3. Click the *Items* link.



- 4. Click the item name to open its profile.
- 5. From the bottom of the *Description* tab, click *Copy*. A confirmation dialog box appears.
- 6. Click *OK*.

 Another item record is created.

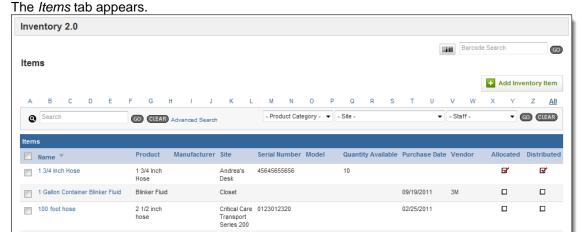
1.20 Editing Item Information

If needed, you can edit the basic information for an item.

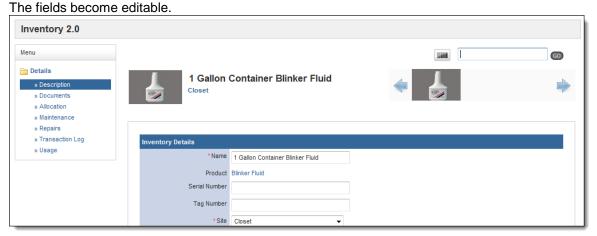
- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.



3. Click the *Items* link.



- 4. Click the item name to open its profile.
- 5. From the bottom of the Description tab, click Edit.



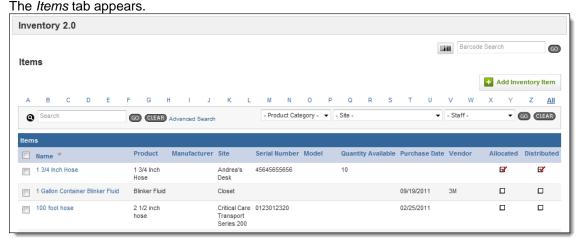
- 6. Using the provided fields, make any desired changes.
- 7. From the bottom of the page, click Save.

1.21 Viewing an Item's Record

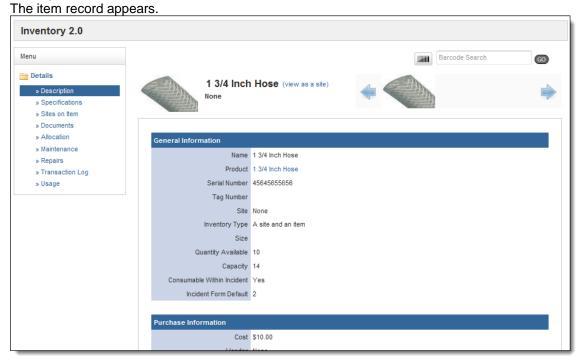
You can view an item's record from the *Items* tab as well as locating it from its product or site.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.

3. Click the *Items* link.



- 4. To view only items for a certain site, product category, or starting with a certain letter, use the appropriate fields to select your criteria.
- 5. Click Go.
- 6. When you locate the desired item record, click the name.



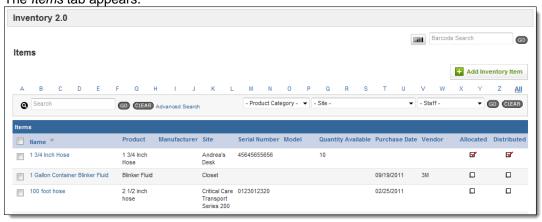
Locating Items with a Barcode Scanner

If you use a barcode scanner, you can scan a products barcode to locate all items for that product.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears



3. Click the *Items* link. The *Items* tab appears.



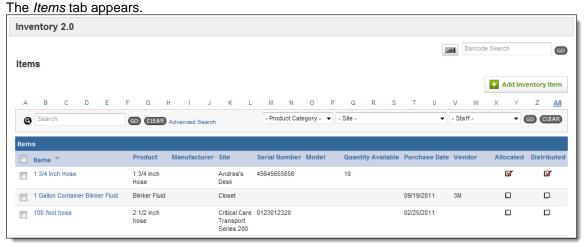
4. Use the barcode scanner to scan the product or type the barcode in the *Barcode Search* text box and click *Go*.

A list of all items with that barcode opens.

1.22 Adding a Document to an Item

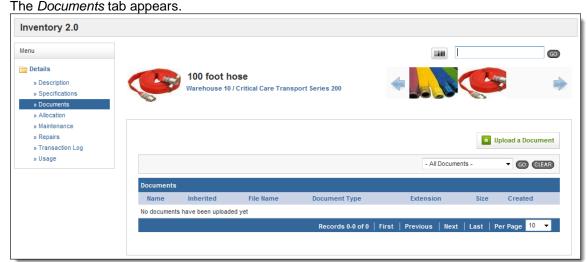
If you have any documents that you would like to store with an item record, you can do so. This can be an easy way to keep track of any more details specifications, maintenance instructions, manuals or other important documents. Documents that have been added to the product for this item will also be displayed with the item record.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.
- 3. Click the *Items* link.



4. Click the item name to open its profile.

5. From the left menu, click *Documents*.



6. Click Upload a Document.

The Upload a Document page appears.



- 7. In the *Name* text box, type a name for this document.
- 8. From the Document Type drop down menu, select the type of document you are uploading.
- 9. In the *Upload* section, click *Browse...*
 - The Choose File dialog box appears.
- 10. Navigate to and select the document you want to upload.
- 11. Click Open.
 - The Choose File dialog box closes.
- 12. Click Upload.
 - The document is added to the record.

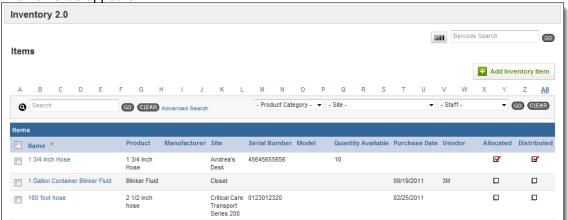
1.23 Allocating an Item

If an item is assigned to someone, you can record that allocation in the system to help keep track of the item. The person you are allocating the item to must be a staff member of your service who has an account set up in the system.

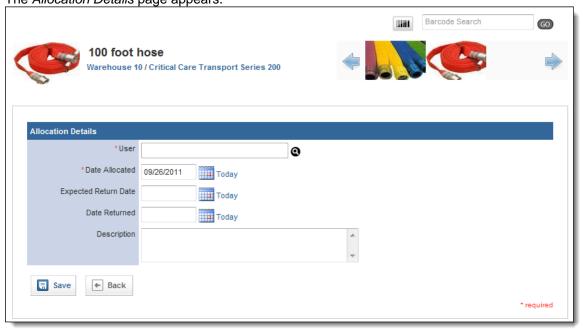


- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears.
- 3. Click the *Items* link.

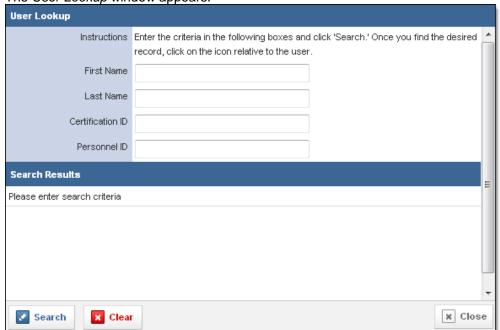
The Items tab appears.



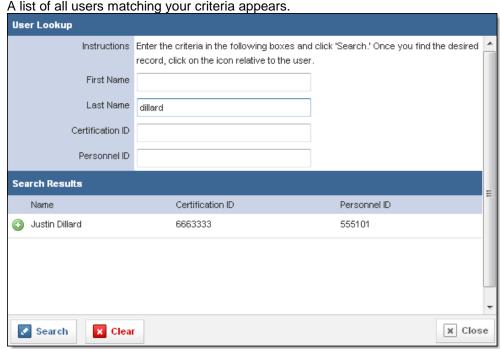
- 4. Click the item name to open its profile.
- 5. From the left menu, click Allocation.
- 6. Click the *Add an Allocation Record* button. The *Allocation Details* page appears.



7. In the *User* section, click the *Lookup* icon The *User Lookup* window appears.



- 8. In the fields at the top of the window, enter any known information to search for the user.
- 9. From the bottom left corner of the window, click Search.



10. For the desired user, click the Add icon

11. In the Date Allocated text box, type the date that this person was assigned this item.

OR

Use the Calendar icon to select the date from a calendar.

ΩR

To record the current date, click the Today link.

12. In the Expected Return Date text box, type the date that this person is expected to return this item.

OR

Use the Calendar icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

13. **OPTIONAL:** If the item has already been returned, in the *Date Returned* text box, type the date the person returned this item.

OR

Use the *Calendar* icon to select the date from a calendar.

OR

To record the current date, click the Today link.

- 14. In the Description text box, type any other information about the allocation.
- 15. When finished, click Save.

The allocation record is saved for this item.

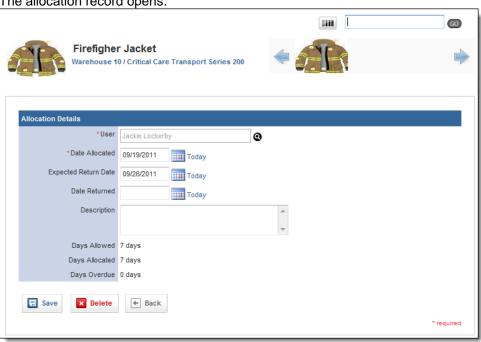
Marking an Allocated Item as Returned

Once an item has been allocated, you should also mark the item as returned once the item is brought back. This will keep your inventory system up to date and prevent items from being marked as overdue.

- 1. Open the desired item record.
- 2. Select the Allocation tab.

A list of all allocations for this item appears.

For the desired allocation record, click the Edit icon The allocation record opens.



4. In the *Date Returned* text box, type the date the person returned this item.

OR

Use the Calendar icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

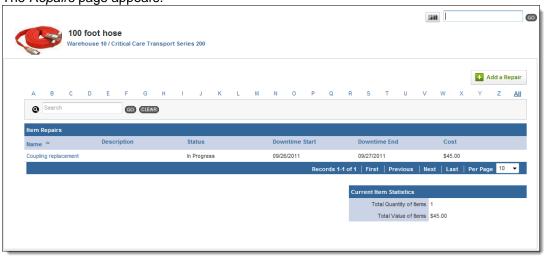


5. When finished, click Save.

1.24 Viewing Repair Information for an Item

The *Repairs* tab in an item lists all repairs that have been done on this item, as well as a summary with information about the replacement parts. For more information about adding a repair record, please refer to the *Adding a Repair for an Item* section of this chapter.

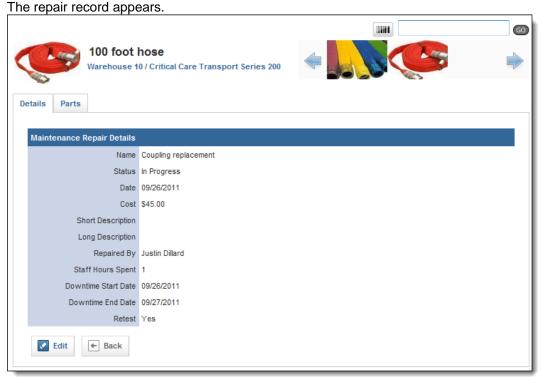
- 1. Open the desired item record.
- 2. From the left menu, click *Repairs*. The *Repairs* page appears.



3. To view summary information about the parts involved in a repair, look at the *Current Item Statistics* section in the bottom right.



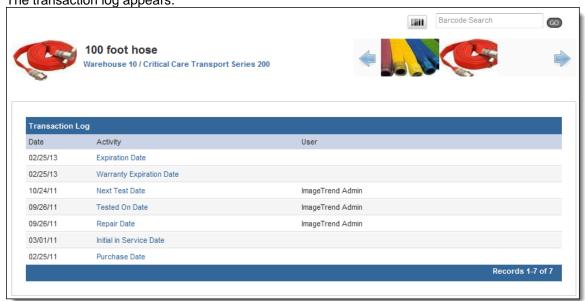
4. To view a specific repair, click the name of the repair.



1.25 Viewing the Transaction Log for an Item

The transaction log keeps track of any dates and events that have affected this item. This can include dates for moving items, purchasing items or the date an item was put in service.

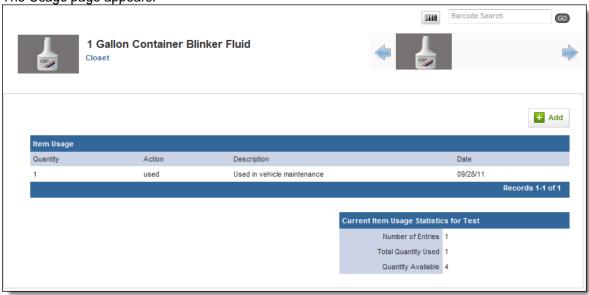
- 1. Open the desired item record.
- 2. From the left menu, select the *Transaction Log* link. The transaction log appears.



1.26 Viewing Usage of an Item

If an item is a consumable, you can view statistics about its usage from the item profile. This can be useful to keep track of the number of pieces left of an item.

- 1. Open the desired item record.
- 2. From the left menu, select the *Usage link*. The *Usage* page appears.

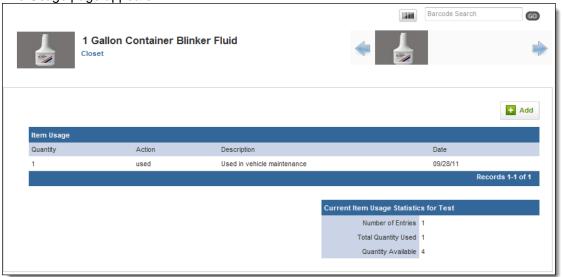


1.27 Adding a Usage Record for an Item

The Inventory system can keep track of how many of an item has been used based on the number of items in the system and the number of items marked as used in run forms or in the item's profile. You can mark any items as used from the item profile.

- 1. Open the desired item record.
- 2. From the left menu, select the *Usage link*.

The *Usage* page appears.



3. Click Add.

The Item Use Records page appears.



- 4. In the Quantity text box, type the number of this item that were used.
- 5. In the *Date Used* text box, type the date that these items were used.

OR

Use the Calendar icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

- 6. From the *Use* drop down menu, select what this item was used for.
- 7. In the Description text box, type any additional information about this use of the item.
- 8. When finished, click Save.

The usage record is saved and the amount of this item that you have on hand is updated.

1.28 Working with Multiple Items

Within a site record, product record or the *Items* tab, you can perform certain actions for multiple items. This can help you to quickly manage your items in the Inventory system based on the site the items are within, items for a particular product or any selection of items.

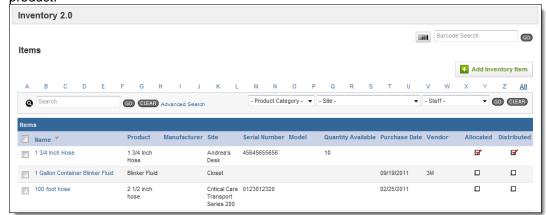
Deleting Multiple Items

You can delete multiple items from your system if needed. Please remember that when you choose to delete an item from a site or product record, it will be removed from the entire Inventory system.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears
- 3. Click the Items link.

The Items tab appears.

NOTE: You can also perform these actions of the lists of items within a site or a product.

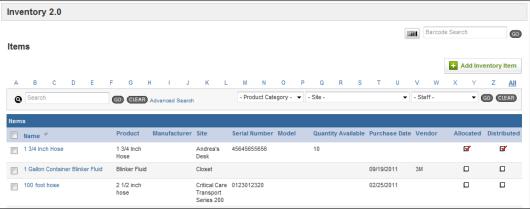


- 4. Select the checkboxes for all items you want to delete.
- 5. From the *Bulk Actions* drop down menu in the bottom left, select *Delete Selected Items*. A confirmation dialog box appears.
- Select OK.
 The items are deleted from the system.

Moving Multiple Items

You can choose to move multiple items to a specific site if needed.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*.
 - The Inventory module appears
- 3. Click the Items link.
 - The *Items* tab appears.
 - NOTE: You can also perform these actions of the lists of items within a site or a product.



4. Select the checkboxes for all items you want to move.

5. From the *Bulk Actions* drop down menu on the lower left, select *Move Selected Items*. The *Move Selected Items* page appears.



6. From the Site drop down menu for each item, select the new site.

OR

To move all items to the same site, from the *Site* drop down menu in the header row, select the new site.

- 7. From the bottom of the page, click *Save*. A confirmation dialog box appears.
- 8. Click OK.

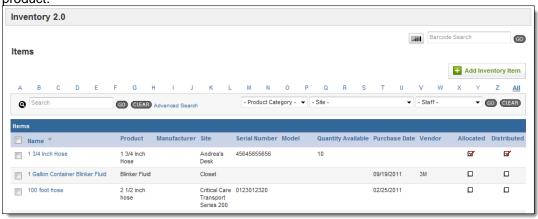
Allocating Multiple Items

You can choose to allocate multiple items at a time.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears
- 3. Click the Items link.

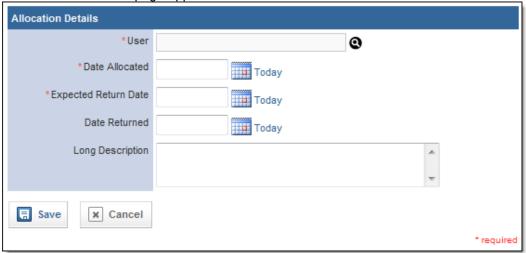
The *Items* tab appears.

NOTE: You can also perform these actions of the lists of items within a site or a product.

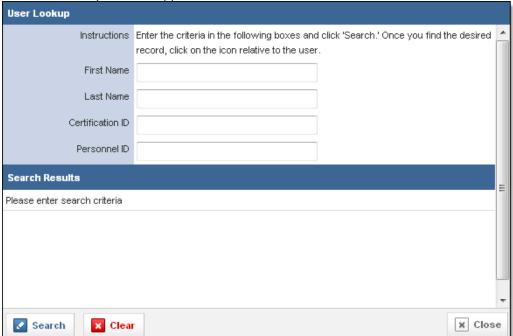


4. Select the checkboxes for all items you want to allocate.

5. From the *Bulk Actions* drop down menu in the lower left, click *Allocate Selected Items*. The *Allocation Details* page appears.



6. In the *User* section, click the *Lookup* icon The *User Lookup* window appears.



7. In the fields at the top of the window, enter any known information to search for the user.

User Lookup Instructions Enter the criteria in the following boxes and click 'Search.' Once you find the desired record, click on the icon relative to the user. First Name Last Name dillard Certification ID Personnel ID Search Results Name Certification ID Personnel ID 🕠 Justin Dillard 6663333 555101 Search x Clear x Close

8. From the bottom left corner of the window, click *Search*. A list of all users matching your criteria appears.

- 9. For the desired user, click the *Add* icon .
- 10. In the *Date Allocated* text box, type the date that this person is expected to return this item.

OR

Use the *Calendar* icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

11. In the Date Allocated text box, type the date that this person was assigned this item.

OR

Use the *Calendar* icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

12. **OPTIONAL:** If the item has already been returned, in the *Date Returned* text box, type the date the person returned this item.

OR

Use the Calendar icon to select the date from a calendar.

OR

To record the current date, click the Today link.

- 13. In the *Description* text box, type any other information about the allocation.
- 14. When finished, click Save.

The allocation record is saved for these items.

Updating Item Information for Multiple Items

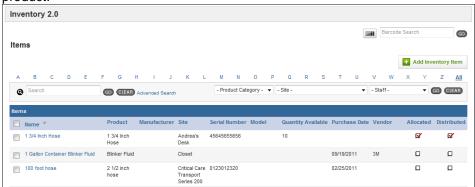
You can update the information for multiple items at the same time, if needed. When you edit the items, fields with information in them will overwrite any previous information in that item record. Fields that are not completed will not make any changes to the original item record.



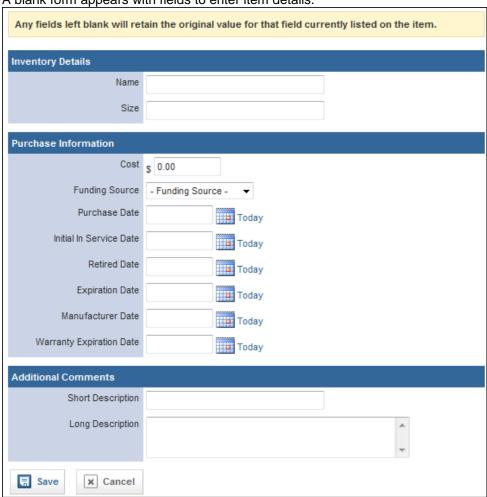
- Once you are logged in to the Fire Bridge system, if necessary, from the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears
- 3. Click the Items link.

The Items tab appears.

NOTE: You can also perform these actions of the lists of items within a site or a product.



- 4. Select the checkboxes for all items you want to edit.
- 5. From the *Bulk Actions* drop down menu in the lower left, click *Update All.* A blank form appears with fields to enter item details.





- Using the provided fields, make any desired changes that should be applied to all the selected item records.
- 7. When finished, click *Save*. The changes are applied.

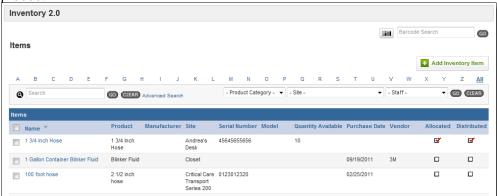
Updating Item Details for Multiple Items

You can update details for multiple items at once, including the items' name, serial or tag number, site, size, capacity, cost, vendor or funding source.

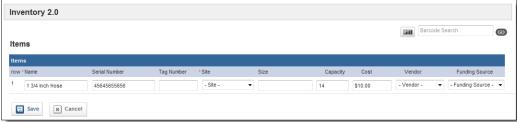
- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears
- 3. Click the Items link.

The *Items* tab appears.

NOTE: You can also perform these actions of the lists of items within a site or a product.



- 4. Select the checkboxes for all items you want to edit.
- From the Bulk Actions drop down menu in the lower left, click Update Details.
 The Items page appears.



6. Using the provided fields, make any changes to the details for these items.



All changes that you make here will apply to all selected items.

Any fields that you leave blank will not be changed from their current value.

7. When finished, click Save.

Adding Maintenance Records for Multiple Items

You can create maintenance records for multiple items from the *Items* page. This allows you to easily create a batch of maintenance records for items that all passed the same maintenance test. You can go back and edit individual records later if needed.



- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click My Fire Department.
- 2. Under the Modules tab, click Inventory 2.0. The Inventory module appears
- 3. Click the Items link.

The *Items* tab appears.

NOTE: You can also perform these actions of the lists of items within a site or a



- Select the checkboxes for all items you want to edit.
- From the Bulk Actions drop down menu in the lower left, click Create Maintenance Record.

The Bulk Add Maintenance page appears. Inventory 2.0 Barcode Search GO **Items** Bulk Add Maintenance *Name *Category - Category -Tested On Today Next Test Today Test Passed O No Warranty Failure Status - Status -**Aditional Comments** Short Description Long Description Save x Cancel

- 6. Use the provided fields to enter the maintenance information.
 - ➡ HINT: For more information about filling in a maintenance record, please refer to the Entering a Maintenance Record for an Item section of this chapter.
- When finished, click Save.

The maintenance records are added.



1.29 Overview of Maintenance Records

Maintenance records are associated with the items that the maintenance was performed upon and can be accessed either from that item's record or from the *Maintenance* tab. Each maintenance record can track and schedule maintenance, and contains basic information such as the test date, status and whether the test was passed, as well as details specific to that type of maintenance and access to any repair information or documents associated with the maintenance.

There are several tabs associated with each maintenance record.

Specifications

The *Specifications* tab contains additional questions that will change based on the type of maintenance performed.

Details

The *Details* tab contains basic information that will be collected for all maintenance, such as the test dates, whether the test was passed and comments.

Repairs

The Repairs tab contains a list of all repairs associated with this maintenance as well as summary information about how many items were needed for repairs and their total cost.

Documents

The *Documents* tab contains a list of any documents that have been uploaded and associated with this maintenance record.

1.30 Viewing a Maintenance Record

You can view a maintenance record either from the item it is associated with or from the Maintenance tab.

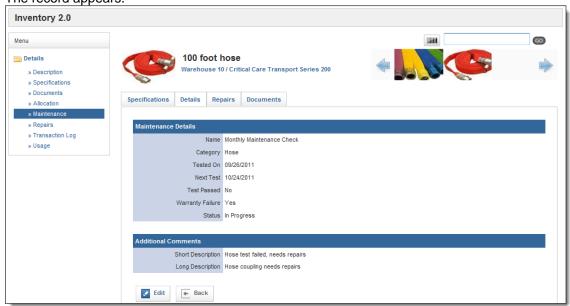
- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears
- 3. Select the Maintenance link.

OR

- a. Select the *Items* link. The *Items* page appears.
- b. Navigate to the desired item and click its name.

 The *Description* section of the item's profile appears.
- c. From the left menu, click Maintenance.

4. Click the name of the maintenance record to view. The record appears.



5. As needed, click additional tabs of the maintenance record to view more information.

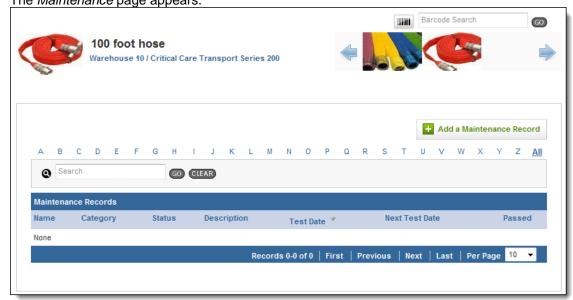
1.31 Adding a Maintenance Record

You can add a maintenance record to the system from the Maintenance section or from the item record.

Adding a Maintenance Record from the Item Profile

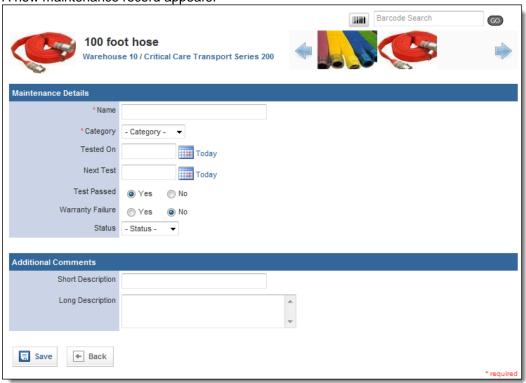
If you add a maintenance record directly from the profile of the item, you will not need to search for the desired item.

- 1. Open the desired item record.
- 2. From the left menu, click *Maintenance*. The *Maintenance* page appears.





Click Add a Maintenance Record.
 A new maintenance record appears.



- 4. In the *Name* text box, type an identifying name for this maintenance record.
- 5. From the Category drop down menu, select the type of maintenance that was done.
- 6. In the *Tested On* text box, type the date that this item was tested.

OR

Use the *Calendar* icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

6. In the Next Test text box, type the date that this item should be tested next.

OR

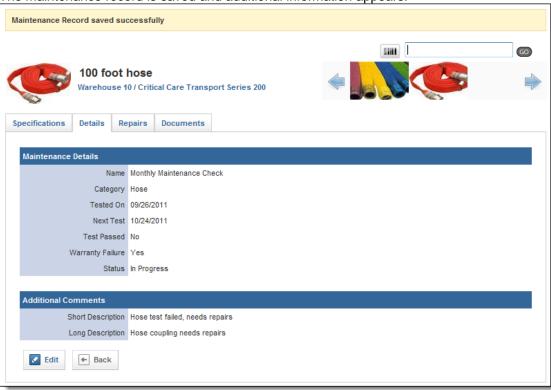
Use the *Calendar* icon to select the date from a calendar.

To record the current date, click the Today link.

- 7. In the *Test Passed* section, select whether this item passed the text.
- 8. In the *Warranty Failure* section, select whether there was any failure currently covered by warranty detected.
- 9. From the Status drop down menu, select the status of this maintenance record.
- 10. In the Additional Comments section, enter any extra details of the maintenance record.

11. When finished, click Save.

The maintenance record is saved and additional information appears.



12. Click into any additional tabs to record more details about the maintenance.

WHINTS:

Information about the specific type of maintenance record can be recorded in the *Specifications* tab.

Information about any needed repairs can be documented in the *Repairs* tab for the maintenance record.

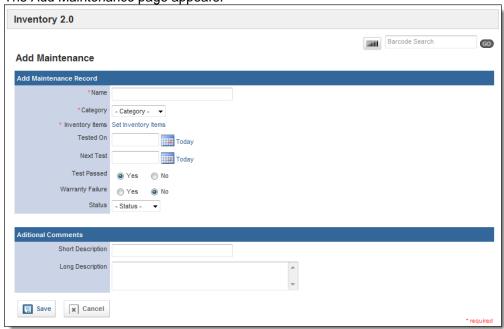
Any documents or files that should be attached to the maintenance record can be included in the *Documents* tab.

Adding a Maintenance Record from the Maintenance Tab

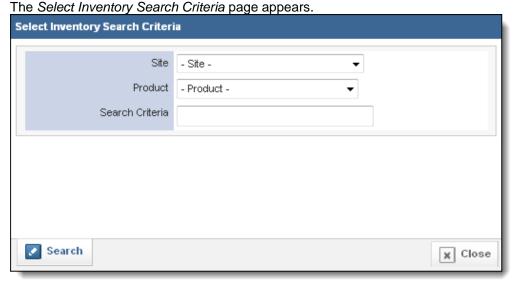
You can add a new maintenance record to the system from the *Maintenance* tab and it will be reflected in the profile of the item that you associate it with.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears
- 3. Select the *Maintenance* link. The *Maintenance* page appears.

Click Add Maintenance Record.
 The Add Maintenance page appears.



- 5. In the *Name* text box, type an identifying name for this maintenance record.
- 6. From the Category drop down menu, select the type of maintenance that was done.
- 7. In the *Inventory Items* section, click *Set Inventory Items*.



8. Using the provided fields, enter search criteria to locate the item this maintenance record should be associated with.

9. Click Search.

A list of all items matching your criteria appears.



- 10. Select the checkbox(es) for all item(s) to add this maintenance record to.
- 11. Click Save.

The items are selected and you are returned to the maintenance record.

12. In the *Tested On* text box, type the date that this item was tested.

OR

Use the *Calendar* icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

13. In the *Next Test* text box, type the date that this item should be tested next.

OR

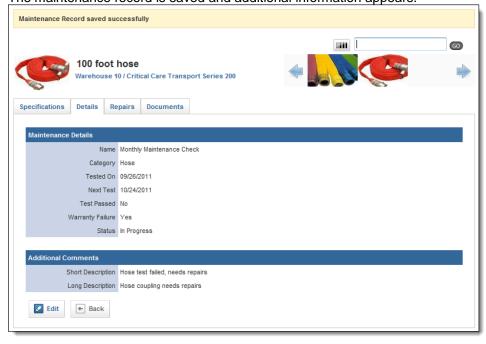
Use the *Calendar* icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

- 14. In the *Test Passed* section, select whether this item passed the text.
- 15. In the *Warranty Failure* section, select whether there was any failure currently covered by warranty detected.
- 16. From the Status drop down menu, select the status of this maintenance record.
- 17. In the Additional Comments section, enter any extra details of the maintenance record.
- 18. When finished, click Save.

The maintenance record is saved and additional information appears.





19. Click into any additional tabs to record more details about the maintenance.

W HINTS:

Information about the specific type of maintenance record can be recorded in the *Specifications* tab.

Information about any needed repairs can be documented in the *Repairs* tab for the maintenance record.

Any documents or files that should be attached to the maintenance record can be included in the *Documents* tab.

Documenting Maintenance Specifications

Each type of maintenance record can have additional questions to be completed, which are included under the *Specifications* tab after creating the maintenance record.

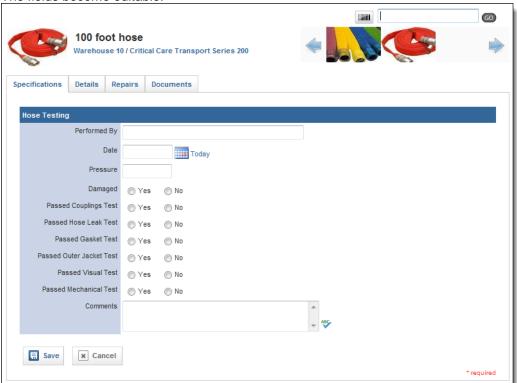
- 1. Add or open the desired maintenance record.
- 2. Select the Specifications tab.

The Specifications tab appears.

NOTE: Depending on the way your maintenance records are set up, you may see different questions for your items.

3. Click Edit.

The fields become editable.



- 4. Use the provided fields to complete the details of the maintenance.
- When finished, click Save.

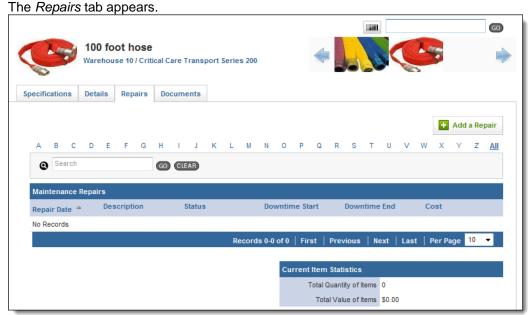
Recording Repairs for a Maintenance Record

If a maintenance inspection indicates that there are repairs needed for an item, you can document those repairs within the maintenance record after it is created.

1. Add or open the desired maintenance record.

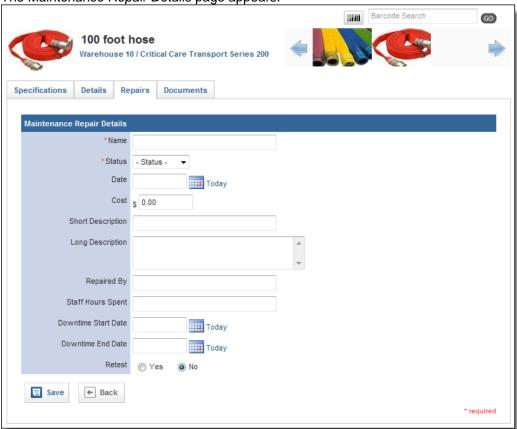


2. Select the *Repairs* tab.



3. Click Add a Repair.

The Maintenance Repair Details page appears.



- 4. In the *Name* text box, type the name of this repair.
- 5. From the Status drop down menu, select the current status of the repair.
 - NOTE: You can update this status later if you need to do so.



6. In the Date text box, enter the date of this repair.

OF

Use the *Calendar* icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

- 7. In the *Cost* text box, type the cost of the repair.
- 8. In the Short Description and/or Long Description text box, type any additional details about the repair.
- 9. In the Repaired By text box, type the name of the person who performed the repair.
- 10. In the *Staff Hours Spent* text box, type the number of hours spent on this repair by your agency's staff.
- 11. In the *Downtime Start Date* text box, type the date that this item was first taken out of use for this repair.

OR

Use the *Calendar* icon to select the date from a calendar.

ΩR

To record the current date, click the Today link.

12. In the *Downtime End Date* text box, type the date that this item was returned to service after this repair.

OR

Use the *Calendar* icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

- 13. In the Retest section, select whether this item will need to be retested after the repair.
- 14. Click Save.

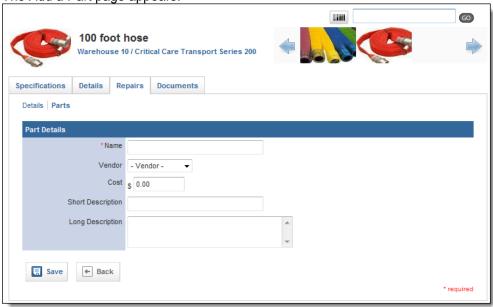
The repair record is added and the *Parts* link appears.

- 15. **OPTIONAL:** To record parts that were used in this repair,
 - a. From the repair record, click the Parts link.



The Parts page appears.

b. Click the *Add a Part* button. The *Add a Part* page appears.



- c. In the Name text box, type the name of the part.
- d. From the *Vendor* drop down menu, select the name of the vendor from whom you bought the part.
- e. In the Cost text box, type the cost of the part.
- f. In the Short Description and/or Long Description text boxes, type any additional details about the part.
- g. Click Save.
- h. Repeat steps a-g for all needed parts.

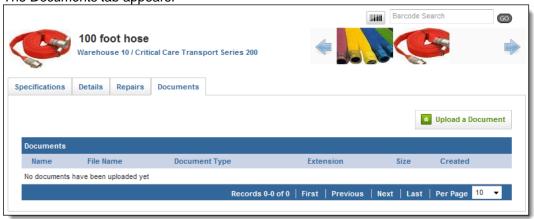
NOTE: As you add parts, statistics will appear on the *Parts* page detailing the number and value of parts needed for this repair.

Adding a Document for a Maintenance Record

You can attach any document to a maintenance record if needed to keep track of it. This could include a receipt for repairs or an image of any repairs required.

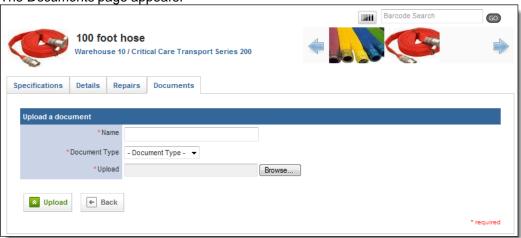
- 1. Add or open the desired maintenance record.
- 2. Select the *Documents* tab.

The Documents tab appears.





3. Click *Upload a Document*. The *Documents* page appears.



- 4. In the *Name* text box, type a name for this document.
- 5. From the *Document Type* drop down menu, select the type of document you are uploading.
- 6. In the *Upload* section, click *Browse...* The *Choose File* dialog box appears.
- 7. Navigate to and select the document you want to upload.
- 8. Click Open.
 - The Choose File dialog box closes.
- Click *Upload*.
 The document is added to the record.

1.32 Adding a Repair for an Item

Any item can have a repair added either through the maintenance record with which the repair should be associated, from the *Repairs* section of the item's profile or from the *Repairs* tab in the system. All repairs will be associated with a specific item and maintenance record, no matter where you add them.

- 1. Once you are logged in to the Fire Bridge system, if necessary, from the top left, click *My Fire Department*.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module appears
- 3. Open the desired maintenance record.

OR

From the top of the page, click the Repairs link.

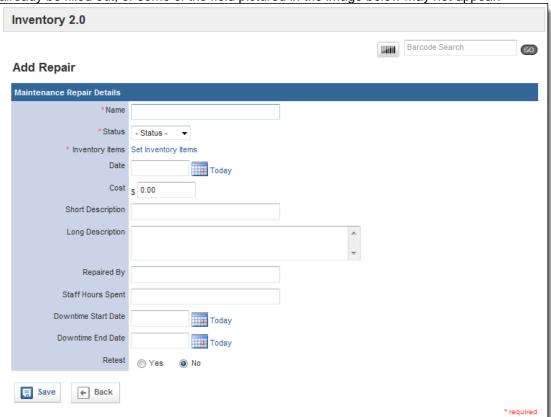
OR

- a. Open the desired item record.
- b. From the left menu, click the Repairs link.
- 4. Click Add a Repair.

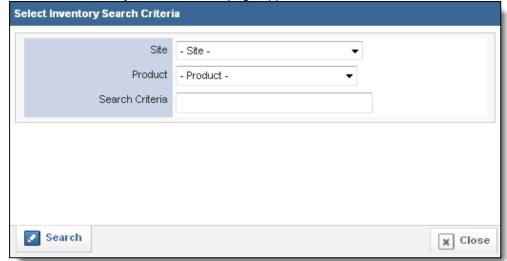


The Add a Repair page appears.

NOTE: Depending on where you started the repair record from, some of the information may already be filled out, or some of the field pictured in the image below may not appear.



- 5. In the *Name* text box, type the name of this repair.
- 6. From the Status drop down menu, select the current status of the repair.
 - NOTE: You can update this status later if you need to do so.
- 7. If the *Inventory Items* section is displayed,
 - a. In the *Inventory Items* section, click *Set Inventory Items*. The *Select Inventory Search Criteria* page appears.



- b. Using the provided fields, enter search criteria to locate the item this repair record should be associated with.
- c. Click Search.

A list of all items matching your criteria appears.



- d. Select the checkbox(es) for all item(s) to add this repair record to.
- e. Click Save.

The items are selected and the *Maintenance Record* field appears.

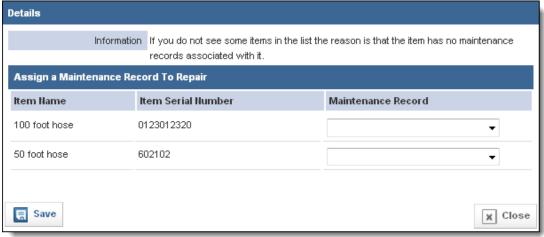
8. If the *Maintenance Record* field is displayed as a drop down menu, select the maintenance record that this repair should be attached to.

OR

If the Maintenance Record field displays a link,

a. Click the Set Maintenance Record link.

The *Details* page appears, with a list of each item that you are creating a repair record for.



- b. From the *Maintenance Record* drop down menu for each item, select the maintenance record that this repair should be associated with.
- c. Click Save.

The maintenance records are selected.

9. In the Date text box, enter the date of this repair.

OR

Use the Calendar icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

- 10. In the Cost text box, type the cost of the repair.
- 11. In the Short Description and/or Long Description text box, type any additional details about the repair.
- 12. In the Repaired By text box, type the name of the person who performed the repair.



- 13. In the Staff Hours Spent text box, type the number of hours spent on this repair by your agency's staff
- 14. In the *Downtime Start Date* text box, type the date that this item was first taken out of use for this repair.

OR

Use the Calendar icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

15. In the *Downtime End Date* text box, type the date that this item was returned to service after this repair.

OR

Use the Calendar icon to select the date from a calendar.

OR

To record the current date, click the *Today* link.

- 16. In the Retest section, select whether this item will need to be retested after the repair.
- 17. Click Save.

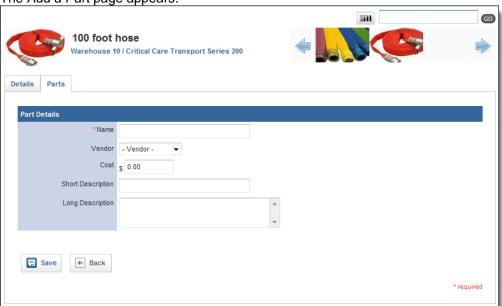
The repair record is added and the *Parts* link appears.

- 18. **OPTIONAL:** To record parts that were used in this repair,
 - a. From the repair record, click the *Parts* tab.



The Parts page appears.

b. Click the *Add a Part* button. The *Add a Part* page appears.



- c. In the *Name* text box, type the name of the part.
- d. From the *Vendor* drop down menu, select the name of the vendor from whom you bought the part.
- e. In the Cost text box, type the cost of the part.
- f. In the *Short Description* and/or *Long Description* text boxes, type any additional details about the part.
- g. Click Save.
- h. Repeat steps a-g for all needed parts.

NOTE: As you add parts, statistics will appear on the *Parts* page detailing the number and value of parts needed for this repair.

CHAPTER 2

SETTING UP THE INVENTORY MODULE



2.1 Chapter Overview

This chapter explains the administrative setup of the Inventory system that is used to control the content of the product and item records. This includes how to set up product categories, manufacturers and vendors, product attributes and vendors, funding sources and document types.

2.2 Setting Up Product Categories

Administrators can set up categories to organize products from the *Setup* tab. These categories will then be available for people who are entering new products. Categories can also define some of the options that will be available for products created within the category.

- 1. From the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory* 2.0. The *Inventory* module opens.
- 3. Select the Setup link.

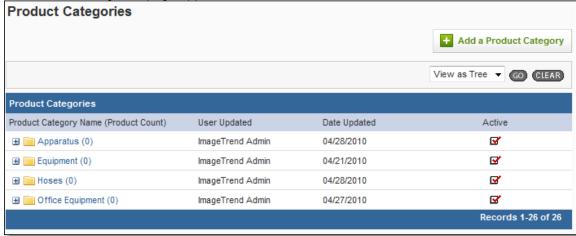


The Setup tab appears.

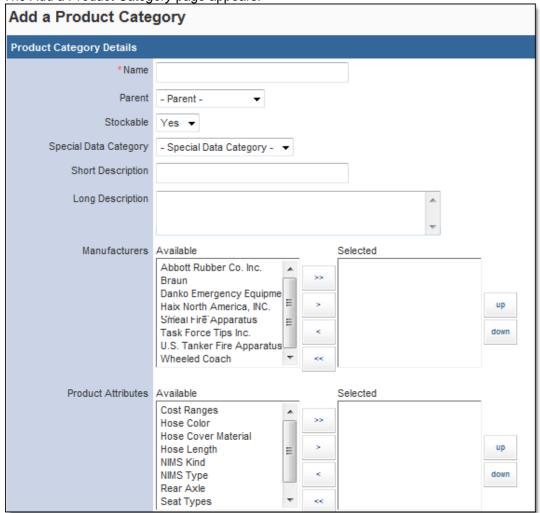
4. If necessary, from the left menu, under Manage Products, click Product Categories.

HINT: If the sub-menu is not displayed under the Manage Products header, click Manage Products to expand the menu.

The Product Categories page appears.



5. Click Add a Product Category.
The Add a Product Category page appears.



- 6. In the *Name* text box, type a name for this category.
- 7. **OPTIONAL:** If this will be a sub-category for a category that has already been created, from the *Parent* drop down menu, select the category that will be immediately above this one.
- 8. From the Stockable drop down menu, select if products within this category can be stored.
- OPTIONAL: If this category should be a part of a special data category to capture custom information, from the Special Data Category drop down menu, select the desired category.
- 10. In the *Short Description* and *Long Description* text boxes, type any descriptive information for this category.
- 11. To add possible manufacturers for products in this category, in the *Manufacturers* section,
 - a. From the Available section, select the desired options.

HINT: You can select multiple options by pressing and holding the *Ctrl* key while clicking each option.

- b. Click the *Add* icon
- c. Repeat steps a-b as needed until all desired manufacturers are added.

HINT: The manufacturers you select here will be available as options for manufacturers when you create products within this category.

12. To add product attributes that should be included for products in this category, in the *Product Attributes* section,

- a. From the Available section, select the desired options.
 - HINT: You can select multiple options by pressing and holding the *Ctrl* key while clicking each option.
- b. Click the Add icon
- c. Repeat steps a-b as needed until all desired attributes are added.
 - HINT: These product attributes will then appear as questions when new products are created within this category.
- 13. To add custom questions that should be asked for products in this category, in the *Custom Questions* section,
 - a. From the Available section, select the desired options.
 - **HINT:** You can select multiple options by pressing and holding the *Ctrl* key while clicking each option.
 - b. Click the Add icon
 - c. Repeat steps a-b as needed until all desired questions are added.
 - **HINT:** These custom questions will then appear as questions when new products are created within this category.
- 14. In the *Active* section, select whether this category should currently be active and available for user, or inactive and saved for only reference.
- 15. When finished, click *Save*. The product category is saved.

2.3 Adding a Manufacturer

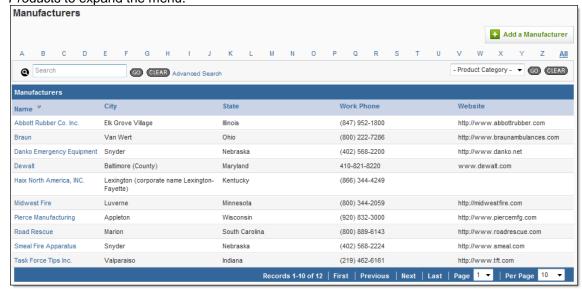
You can record manufacturers when you create product records, but the manufacturer records must first be set up in the *Setup* tab.

- 1. From the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory* 2.0. The *Inventory* module opens.
- 3. Select the Setup link.



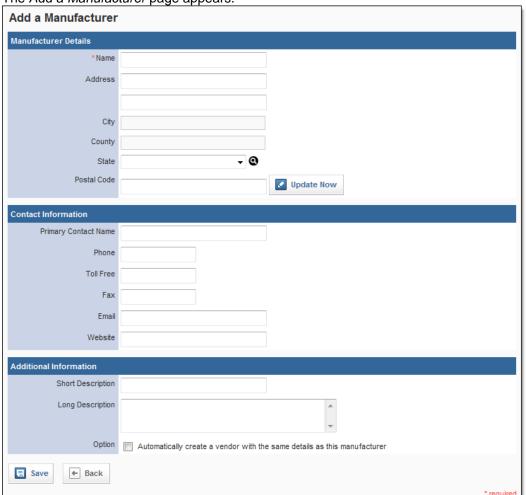
4. If necessary, from the left menu, under Manage Products, click Manufacturers.

Froducts to expand the menu.



5. Click Add a Manufacturer.

The Add a Manufacturer page appears.



- 6. In the Name text box, type the name of this manufacturer.
- 7. In the Address text boxes, type the manufacturer's address.
- 8. In the *Postal Code* text box, type the zip code for the manufacturer.
- 9. Click Update Now.
 - The city, county and state information is added to the record.
- 10. In the *Contact Information* section, type all known information about any contact at this manufacturer.
- 11. In the Additional Information section, type any descriptive information about this manufacturer.
- 12. To also create a vendor record for this manufacturer, select the *Automatically create a vendor with the same details as this manufacturer* checkbox.
 - Fig. 1. This is most helpful if you buy merchandise directly from the manufacturer.
- 13. When finished, click Save.

The manufacturer record is added to the system.

2.4 Adding a Product Attribute

Product attributes allow you to collect custom information about specific categories of products. They appear as questions with a drop down menu on the product record. You must create the product attribute before you can apply it towards a category or product.

Product attributes are similar to custom questions, but when adding a product attribute the field must have a drop down menu.

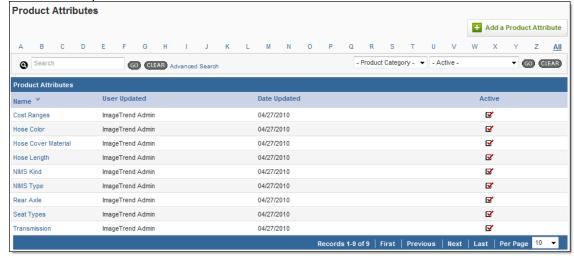
- 1. From the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory* 2.0. The *Inventory* module opens.
- 3. Select the Setup link.



The Setup tab appears.

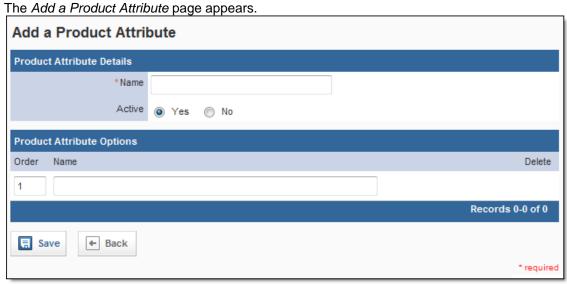
4. If necessary, from the left menu, under Manage Products, click Product Attributes.

HINT: If the sub-menu is not displayed under the *Manage Product*s header, click *Manage Product*s to expand the menu.





5. Click Add a Product Attribute.



- 6. In the Name text box, type the question.
- 7. In the *Active* section, select whether this attribute should currently be active and available in the system for use, or inactive and saved for reference or later use.
- 8. To add a possible answer for the question that will be generated for the attribute, in the *Product Attribute Options* section, in the *Name* text box, type the first answer.
- 9. Click Save.
 - A new line appears.
- 10. Repeat steps 8-9 until all desired answers are added.
- 11. To change the order of any of the possible options, in the *Order* text boxes, type the number corresponding to the desired order.
- 12. Click Save.

2.5 Adding a Vendor

Each product and item record can be associated with vendors. This allows you to record which vendors sell particular products and where an item was purchased. Before you can do this, however, you must set up the vendor records.

- 1. From the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module opens.
- 3. Select the Setup link.



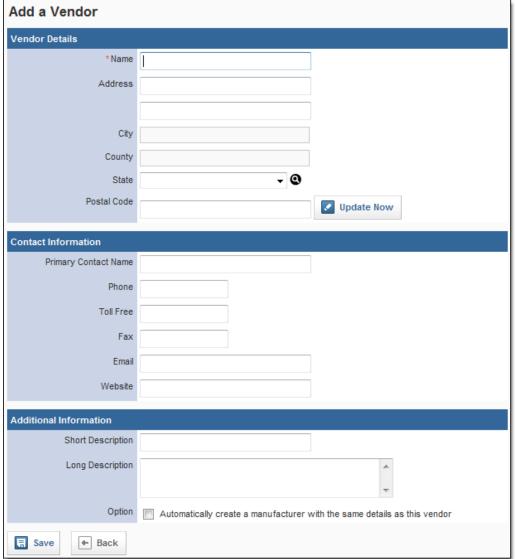
4. If necessary, from the left menu, under Manage Products, click Vendors.

HINT: If the sub-menu is not displayed under the *Manage Products* header, click *Manage Products* to expand the menu.



5. Click Add a Vendor.

The Add a Vendor page appears.



- 6. In the Name text box, type the name of this vendor.
- 7. In the *Address* text boxes, type the vendor's address.
- 8. In the *Postal Code* text box, type the zip code for the vendor.
- 9. Click Update Now.
 - The city, county and state information is added to the record.
- 10. In the Contact Information section, type all known information about any contact at this vendor.
- 11. In the *Additional Information* section, type any descriptive information about this vendor.
- 12. To also create a manufacturer record for this manufacturer, select the *Automatically create a manufacturer with the same details as this vendor* checkbox.
 - Fig. 1. HINT: This is most helpful if you buy merchandise directly from the manufacturer.
- 13. When finished, click Save.

The vendor record is added to the system.

2.6 Adding Repair Statuses

When recording repairs for an item's maintenance record, you can personalize the repair statuses that are available. This allows you to track the progress of repairs.

- 1. From the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module opens.
- 3. Select the Setup link.



The Setup tab appears.

4. Under Manage Maintenance, click Repair Statuses.

The Repair Statuses page appears.

HINT: If the sub-menu is not displayed under the *Manage Maintenance* header, click *Manage Maintenance* to expand the menu.



5. Click Add a Repair Status.

The Maintenance Status Details page appears.



- 6. In the *Name* text box, type the name of the status.
 - Final HINT: This will be the text that you can select when assigning a status.
- 7. In the Show on Widget section, select whether repairs with this status should be included in the Selected Maintenance Repair Statuses widget for the Inventory Dashboard.
- 8. In the *Description* text box, type any additional information about this status.
- 9. Click Save.

The status is added.

2.7 Adding a Maintenance Status

You can assign a status to any maintenance record in your system, and your service can customize the statuses that are available. This allows you to track the progress of maintenance on any item.

- 1. From the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module opens.
- 3. Select the Setup link.



The Setup tab appears.

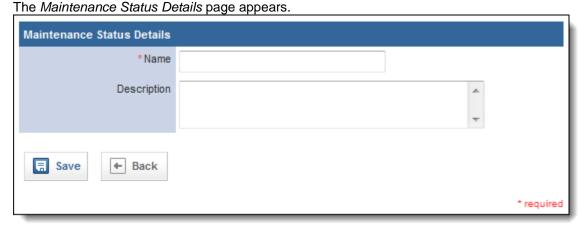
4. Under *Manage Maintenance*, click *Maintenance Statuses*. The *Maintenance Statuses* page appears.

FINT: If the sub-menu is not displayed under the Manage Maintenance header, click Manage





5. Click Add a Maintenance Status.



- 6. In the *Name* text box, type the name of the status.
 - Final HINT: This will be the text that you can select when assigning a status.
- 7. In the *Description* text box, type any additional information about the status.
- 8. When finished, click *Save*.

 The status is added and available for use.

2.8 Adding a Maintenance Category

Maintenance categories allow you to organize maintenance records, as well as to associate specific types of maintenance with special data categories to collect information specific to that type of maintenance. You can add as many maintenance categories as needed, although each maintenance category can be associated with only one special data category.

- 1. From the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory* 2.0. The *Inventory* module opens.
- 3. Select the Setup link.

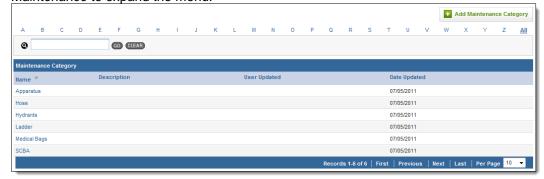


The Setup tab appears.

4. Under Manage Maintenance, click Maintenance Statuses.

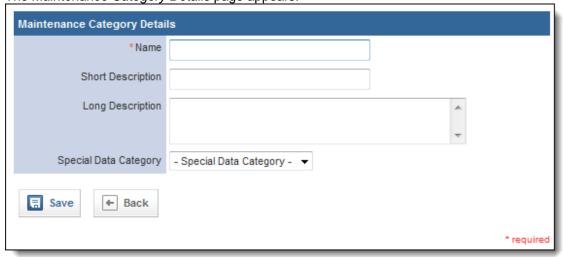
The Maintenance Statuses page appears.

HINT: If the sub-menu is not displayed under the *Manage Maintenance* header, click *Manage Maintenance* to expand the menu.





Click Add Maintenance Category.
 The Maintenance Category Details page appears.



- 6. In the *Name* text box, type a name for the category.
- 7. In the *Short Description* and *Long Description* text boxes, type any additional descriptive information about the category.
- 8. From the *Special Data Category* drop down menu, select the data category to be associated with this maintenance category.
- 9. When finished, click *Save*. The maintenance category is saved.

2.9 Adding Special Data Categories

Special data categories allow you to collect information that may be specific to a product or maintenance category within that product or item record. This allows you to keep track of all the information you need, without having extra fields on product records. For example, special data categories allow you to collect fuel receipts or tire information about apparatuses, but will prevent them from being displayed on product records for boots or desks.

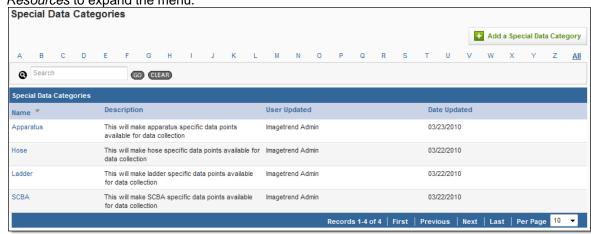
Special data categories are set up with elements, which determine exactly what information is collected. They are then assigned to product categories, which determines which products and items can collect the information.

- 1. From the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module opens.
- 3. Select the Setup link.



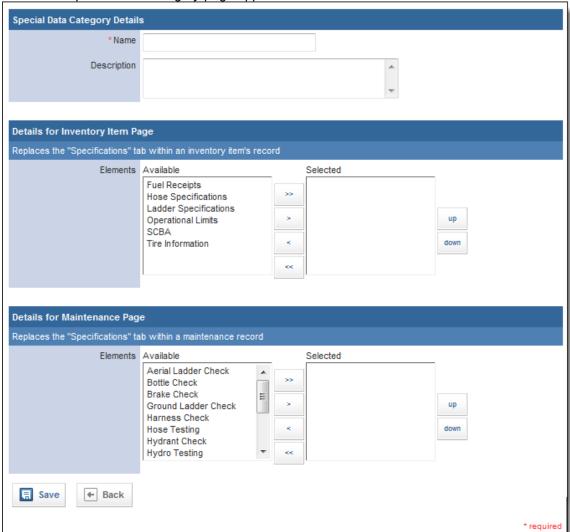
4. From the left menu, under Manage Resources, click Special Data Categories.

FINT: If the sub-menu is not displayed under the Manage Resources header, click Manage Resources to expand the menu.



5. Click Add a Special Data Category.

The Add a Special Data Category page appears.



- 6. In the *Name* text box, type the name for this data category.
- 7. In the *Description* text box, type any additional explanation of this category.
- 8. In the *Details for Inventory Item Page* section, from the *Available* scroll list, select the elements that you would like to include for items that have this special data category.

W HINTS:

The elements will determine what new information is collected for these items.

To select multiple items, press and hold the Ctrl key while clicking each desired element.

- 9. Click the Add icon
- 10. Repeat steps 8–9 until all desired elements are added for inventory items.
- 11. **OPTIONAL:** To reorder the selected elements, select the desired element and click the *up* and *down* buttons until the elements are in the desired order.
- 12. In the *Details for Maintenance Page* section, from the *Available* scroll list, select the elements that you would like to include for maintenance records that are associated with this special data category.

WHINTS:

The elements will determine what new information is collected for these items.

To select multiple items, press and hold the Ctrl key while clicking each desired element.

- 13. Click the *Add* icon
- 14. Repeat steps 12-13 until all desired elements are added.
- 15. **OPTIONAL:** To reorder the selected elements, select the desired element and click the *up* and *down* buttons until the elements are in the desired order.
- 16. When finished, click Save.

The special data category is created and can be assigned to product categories for use.

2.10 Adding Custom Questions

Custom questions allow you to collect custom information about a certain category of products by placing a question with a text box on the product record. You must create the custom questions before they can be applied to a product or category. Custom questions are similar to product attributes, but allow you to use either a drop down menu or a text field to collect the information.

- 1. From the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module opens.
- 3. Select the Setup link.



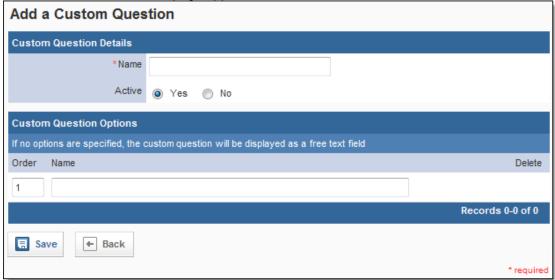
4. If necessary, from the left menu, under Manage Resources, click Custom Questions.

HINT: If the sub-menu is not displayed under the Manage Resources header, click Manage Resources to expand the menu.



5. Click Add a Custom Question.

The Add a Custom Question page appears.



- 6. In the Name text box, type the question.
- 7. In the *Active* section, select whether this question should currently be active and available in the system for use, or inactive and saved for reference or later use.
- 8. **OPTIONAL:** To create a drop down menu with possible answers for this question,
 - a. In the *Product Attribute Options* section, in the *Name* text box, type the first answer.
 - b. Click Save.
 - A new line appears.
 - Repeat steps a-b until all desired answers are added.
 - d. To change the order of any of the possible options, in the *Order* text boxes, type the number corresponding to the desired order.
- 9. Click Save.

2.11 Adding Document Types

All documents that are uploaded to the system can be classified with a document type to organize them. You can set up these document types in the *Setup* section.



- 1. From the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module opens.
- 3. Select the Setup link.



The Setup tab appears.

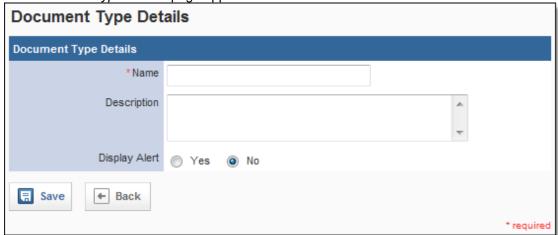
4. Under *Manage Resources*, click *Document Types*. The *Document Types* page appears.

HINT: If the sub-menu is not displayed under the Manage Resources header, click Manage Resources to expand the menu.



5. Click Add a Document Type.

The Document Type Details page appears.



- 6. In the *Name* text box, type a name for this document type.
- 7. In the *Description* text box, type any additional information about this document type.

HINT: If you have multiple document types, you may want to enter extra details here to make it easier for people to tell exactly what types of documents should be classified under this type.

8. To show an alert on a product or item that has a document of this type, in the *Display Alert* section, click *Save*.

FINT: The alert will be displayed as an icon in the header for this product or item. The document type is created.

2.12 Adding Funding Sources

You can record the funding source used to purchase items once funding sources are set up in the *Setup* section.

- 1. From the top left, click My Fire Department.
- 2. Under the *Modules* tab, click *Inventory 2.0*. The *Inventory* module opens.
- 3. Select the Setup link.

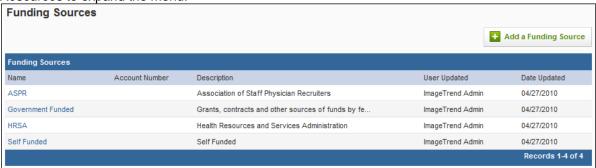


The Setup tab appears.

4. Under Manage Resources, click Funding Sources.

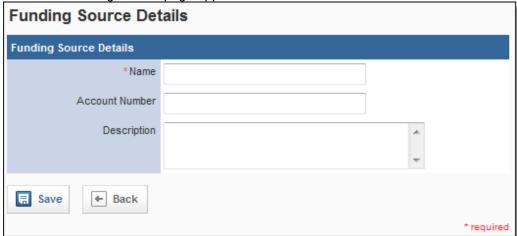
The Funding Sources page appears.

HINT: If the sub-menu is not displayed under the Manage Resources header, click Manage Resources to expand the menu.



5. Click Add a Funding Source.

The Add a Funding Source page appears.



- 6. In the *Name* text box, type a name for this funding source.
- 7. **OPTIONAL:** To record any account number with the record for this funding source, in the *Account Number* text box, type the number.
- 8. In the Description text box, type any explanation or additional information about the source.
- 9. When finished, click Save.



CHAPTER 3

HELP AND SUPPORT



Help and Support

Before Contacting ImageTrend

Please have the following information accessible when calling ImageTrend:

- A description of your computer system.
- The name of your operating system and service pack version (if applicable).
- A description of what happened and what you were doing when the problem occurred.
- The exact wording of any error messages you see.
- Your company name and contact information.

Contacting ImageTrend

If you are unable to find the information needed to use (product Name) effectively, please consult ImageTrend in any of the following ways:

•	Main Office Phone	(952) 469.1589
•	EDS Support Phone	(888) 730-3255
•	Toll-Free	(888) 469.7789
•	Fax	(952) 985.5671
•	Web	http://support.imagetrend.com
•	Fmail	support@imagetrend.com

ImageTrend support services are available:

```
Monday – Friday
8:30 a.m. to 5:00 p.m. central time
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Technical Support

For 24-hour technical support, ImageTrend provides online assistance through their website and email services:

Web http://support.imagetrend.comEmail support@imagetrend.com