

# CHAPTER 24T

## INVENTORY TUTORIAL

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### Inventory Records

There are many benefits to tracking your inventory with FirePro. The Inventory Module allows you to monitor the quantity, locations, service records and defects of your inventory items, and can even track the incidents when each item has been used or who the items have been assigned to.

Inventory records can be attached to records in other modules, including Firefighters, Incidents, Meetings & Training and even some invoicing. There is also a customizable system for recording inventory locations built into FirePro, which can be used to create detailed maps to every piece of inventory.

This tutorial will outline the important steps of organizing, categorizing, entering and maintaining your inventory records. More detailed information about each step can be found in the appropriate chapters of the FirePro Manual.

**If you have any questions about how the reference system works, refer to *Chapter 1: Using this Manual.***

### Planning Your Inventory

The Inventory Module is a very powerful one, but it's also one that requires considerable planning before you start entering information - taking a few days at the beginning of the process to decide what you need will save you a lot of time further down the road. Also, don't feel that you have to use all the features in the module. A lot of Departments can get along just fine with only a minimal system, so don't set something up that will take more time to manage than you have available.

### Step 1: What Do You Need to Know?

The first question that you should ask yourself when planning your inventory is "What do I need to know about my inventory?" A quick check of the records that you currently keep should tell you the basic answer to that question. You probably already have records of the critical things that you have to track - things like SCBA maintenance schedules and equipment lists.

This question "What do I need to know about my inventory?" should be your main guide when planning out your inventory - if entering information in a record or setting up a location isn't going to tell you something that you need to know, you probably don't have to do it.

### Step 2: What Do You Already Know?

By the time you've thought out your first question, you'll probably be well on your way to answering this one. Getting all your inventory information together is an important step in this process, and can potentially include a lot of information.

For example, you may have spreadsheets tracking service schedules, file folders full of receipts for equipment, or typed lists of equipment issued to each Firefighter. You don't have to enter all of this information immediately, but you can record it all in FirePro, and wouldn't it be nice to not only get rid of all that clutter, but to also be able to quickly generate reports about it?

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### Step 3: Organize Your Module

At this stage, you should have a pretty good idea of the information you want to enter in the system, and have that information available. Now you'll want to actually figure out how all your inventory items are going to be classified.

FirePro's Inventory Module has several levels of organization available, and you'll be able to use any or all of them. Probably the easiest thing to do at this stage is to create a spreadsheet. The fields on the spreadsheet should match the ones in the FirePro Inventory records, and it's helpful to have them in the same order that they appear.

There are several important things that you need to decide at this stage, and they relate to the first 3 fields on the inventory record: Category, Sub-Category and Location.

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### Categories

Categories are the broadest level of organization in the Inventory Module. By breaking down your inventory into more manageable sections you make it easier to find things. Categories can be defined however you want, but you should try to make them fairly broad, very clear and as intuitive as possible. Remember; try to use categories that will make sense to somebody else, if you're not here to explain them.

If you've been doing any inventory tracking, you probably already have most of your categories laid out - it's a natural way to organize inventory. Of course, if you've always wanted to make your inventory clearer and more organized, this is an excellent opportunity.

Having a Category for each inventory item is required, but if you aren't putting a lot of items into your inventory module, and you're not tracking service schedules, you don't have to get any more detailed than that.

To create/edit the category list, go to:



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### Sub-Categories

The next layer of organization in the Inventory Module is the Sub-Categories. They do two things. First, they serve to further define inventory items in each Category, and second, they are where your scheduled maintenance records are attached.

One of the great benefits to the Inventory Module is that you can record the dates and time periods of your scheduled maintenance tasks and FirePro will automatically remind you when your maintenance is due.

To do this, you must use Sub-Categories, although you can also use them just for organization - you don't have to attach service schedules. This puts some practical limitations on how you use sub-categories in general, though. If you are creating a sub-category that you want to have a service schedule on, the sub-category should be a specific type of item, all of which would have the same service schedule - Aluminum-Tank SCBA for example.

In this case the organization would be:

Category: SCBA

Sub-Category: Aluminum-Tank SCBA

You can use more general sub-categories if you aren't attaching service schedules, a Tools category divided into Power Tools and Hand Tools sub-categories, for example.

To create or edit your list of subcategories, go to:



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### Locations

You can also record the physical locations of your equipment using the Inventory Module. Here too, there are several levels of complexity you can use; depending if you feel your department needs it.

When setting up your locations, the first thing to decide is how detailed you want your locations to be. You can go from the very general - Pumper Truck 1, to the very specific - Front Left Compartment, Pumper Truck 1. Different Locations can also be tied together with Group Codes, allowing you to generate reports on multiple locations simultaneously.

To create a list of locations for inventory items, go to:



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## Step 4: Complete Your Spreadsheet

At this point, you should have your Categories, Sub-Categories and Locations planned out and possibly entered in FirePro. The next thing to do is to complete your spreadsheet so that you can easily enter your Inventory information.

### ***CODE (CUSTOM LABEL)***

This will be the primary identifier for the inventory item, and each inventory item is required to have one. Make it as descriptive as possible, as it will be used as the identifier of this individual inventory item. This means that if you have several similar items, you should give them numeric identifiers: Black XL Hoodie 1, Black XL Hoodie 2, for example. The Code field may be used as a search parameter by which to find an inventory item. When you are assigning codes to inventory items, bear in mind that each code should be unique *within the current category*. This means it is possible to have duplicate codes, but they must be assigned to different Categories.

### ***SERIAL #***

You can record up to 2 serial numbers for each piece of inventory, which is useful for multi-piece items, like an SCBA with a tank and mask. Serial # is an optional field and can be left blank, but since it is possible to search your inventory by serial number you may find it useful to record them.

### ***QUANTITY***

This field records the total number of items this record represents. For most items this would be 1, but would be larger for consumables or small items like screwdrivers that you don't want to create individual records for.

### ***PURCHASED***

The date the item was purchased.

### ***COST***

The total cost of the quantity of items indicated - so if your quantity field is for 10, it's the total cost of all 10.

### ***SERVICE SCHEDULE***

To ensure that the service schedule reminders work correctly, you will need the last service date for each item, for each service type.

### ***DESCRIPTION***

This field allows you to make additional text notes regarding the inventory item.

### ***SPECIFICATIONS***

This field also allows text notes, and is generally used for technical information about an item.

## Step 5: Entering your Inventory Items

Now your spreadsheet is populated and you can start entering your inventory items into FirePro. If you haven't already, build your Category, Sub-Category and Location lists, then open the Inventory Module and use the Add (Add+ if you are entering multiple inventory items at once) button to start entering items.

To learn more about the record management buttons, go to:

**3.30**  
to  
**3.70**

You should already have most of your fields filled out on your spreadsheet, but there are several fields on the form that you will fill out only for certain types of items:

### ***APPARATUS***

Turn on the Apparatus flag to indicate if a piece of inventory is a vehicle.

To learn more about the Apparatus Flag, go to:

**24.C - APPARATUS**

Setting a piece of inventory as an Apparatus allows it to be used in several other parts of FirePro, including the Truck Chart in Incidents:

To learn more about the Truck Chart, go to:

**6.G.90 Truck Charts Window**

### ***INVOICE COSTS***

You can also record invoicing costs for Apparatus items, which can be used to quickly generate invoices in Incident reports, if you are using the Invoice Module

To learn more about setting invoice costs, go to:

**24.C - APPARATUS**

or



**FirePro Tip O' the Week #103 TRUCK CHARTS AND INVOICING**

### ***MONITOR DRIVING***

When you turn on the Monitor Driving flag for an Apparatus, FirePro will send you reminders if Firefighters that are flagged as drivers do not drive the vehicle for a set length of time.

To learn more about Monitoring Driving, go to:



**FirePro Tip O' the Week #109 MONITORING SCBA & DRIVING**

### ***GAS MILEAGE***

You can use this button to record distance driven, amount of fuel added and total cost of fuel for each refill - FirePro will automatically calculate gas mileage for you.

To learn more about recording Gas Mileage, go to:  
[\*\*\*20.G.40 Gas Mileage\*\*\*](#)

### ***LINK TO INCIDENTS***

Turn on this flag if you would like to record whether this piece of inventory is used at Incidents.

To learn more about linking inventory to incident reports, go to:  
[\*\*\*6.G.120 Inventory Used at Incident Window\*\*\*](#)  
or



**FirePro Tip O' the Week #13 - INVENTORY USED AT INCIDENTS**

### ***RETIRED***

Use the Retired flag to remove a piece of inventory from the active inventory list without deleting the record from the system.

**[24.T.80](#)**

## **[Adding Additional Information to Records](#)**

Once you have inventory records in the system, there are a number of additional pieces of information that you can attach to each record.

**[24.T.80.10](#)**

### **[Service Records](#)**

The Service Records window can be used to record the date, type and cost of different types of maintenance and servicing done on an inventory item. FirePro 2 also has a convenient Update Service Records for Multiple Items option in the Action Menu of the Inventory Module.

To learn more about Service Records, go to:  
[\*\*\*24.G.20 Service Records Window\*\*\*](#)

**[24.T.80.20](#)**

### **[Defects](#)**

The Defects window is used to record the progress of an identified defect or breakdown of an inventory item, from identification, through to repair and return to service. By flagging an "Out of Service date" for an inventory item in this window, you mark the inventory record with an "Out of Service" note.

To learn more about Defects, go to:  
[\*\*\*24.G.10 Defects Window\*\*\*](#)

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### Picture & Links

You can attach image files to the record with the Picture button, and any additional type of file with the Links button.

To learn more about Pictures and Links, go to:  
**3.90 and 3.100**

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### The Assigned Button

Inventory items can be attached to Firefighter records and Incident Reports. If an inventory record has been attached to one of these other modules, the Assigned Button will highlight - you can then use the button to show a list of all records that the inventory item has been attached to, and clicking on them from the list will take you directly to the record.

To learn more about the assigning inventory, go to:



**FirePro Tip O' the Week #13 *INVENTORY USED AT INCIDENTS***

or



**FirePro Tip O' the Week #100 *ASSIGNING INVENTORY TO FIREFIGHTERS***

## 24.T.90

### Locating Inventory Records

Now that you've added your inventory items, it's likely that you'll want to be able to find them again. You can locate inventory records using the Find By Category and Find by Location buttons, or by using the Action→Find option and entering the item's code or serial number.

#### Find by Category

This button will bring up a search window that organizes your inventory items by Category, Sub-Category and finally identifies them by Code. Simple double-click on a selection until you reach an item, in which case the search window will disappear and the inventory record will be displayed.

#### Find by Location

This button will bring up a search window that organized your inventory items by Location, Sub-Category and Code. Otherwise, it works exactly like the Find by Category button.

## Next and Previous Buttons

These buttons will move you through the inventory records one at a time - if you did a previous find, FirePro will use that search as the index. It is generally a very slow way of moving through records.

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## The Inventory Action Menu

Most of the options in the Inventory Action Menu duplicate ones that can be found through buttons on the Inventory window. The options that can only be accessed through the action menu are:

### Action→Delete

The delete option will completely remove the selected record from FirePro. If the inventory item is attached to any other reports, you should probably use the Retired flag instead.

### Action→Update Service Schedules for Many Inventory Items

This option is very useful when you have done maintenance on a number of inventory items and need to update service schedules on all their records.

To learn more about updating multiple service schedules, go to:  
*24.G.30 - Update Reminder Dates Window*

## 24.T.110

## Inventory Reports

There are several different inventory reports available in FirePro. Most Inventory reports allow you to use Categories, Sub-categories and Locations, as well as purchase dates as parameters.

To learn more about the available inventory reports, go to:



**24.R - Reports**