

FP2 - TIP O' THE WEEK #69

SETTING UP INVENTORY ITEMS



Setting Up Inventory Items

Prior to entering inventory data, it is necessary to define categories, subcategories and locations under which to record inventory items. This is a relatively simple three step process in FirePro 2.

Categories

The hard part comes before you start entering data into FirePro! You may want to really think about what categories you will need and make a list on paper. The category is the type of item – for example, “Radios” can be a category, but a specific radio is an inventory item and should not be entered yet.

You can actually start with a list of inventory items and work from that to determine what categories you might need.

Sub-Categories

Next, think about any sub-categories that may be required. If you have a category for “Radios”, you may wish to have sub-categories of “Hand held”, “Pagers” and “Truck mounted” etc.

Some categories may not need a sub-category (i.e.: a category of “Small Tools” may not warrant sub-categories for “Screwdrivers”, “Hammers” etc. This is totally up to you.).

Some categories may only need one sub-category. Why not just a category and no sub-category then, you ask? Sub-categories allow you to assign a maintenance service schedule. So, for a Category of “Trucks”, you may only need one sub-category of “Trucks”. Again, this is up to you and what suits the needs of your department.

The important thing to remember is that, categories and sub categories are not inventory items, but rather a way to group inventory items together.

Locations

Finally, think of the places where these items may be located in order to set up your “Locations”. Your locations can be very general (i.e.: truck bay) or very specific (i.e.: the front right compartment of Pumper Truck 1). You may also wish to have a location called “Personnel” since some inventory items won’t have a physical location (i.e.: a pager is typically with a person, not on a truck or in a locker etc.).

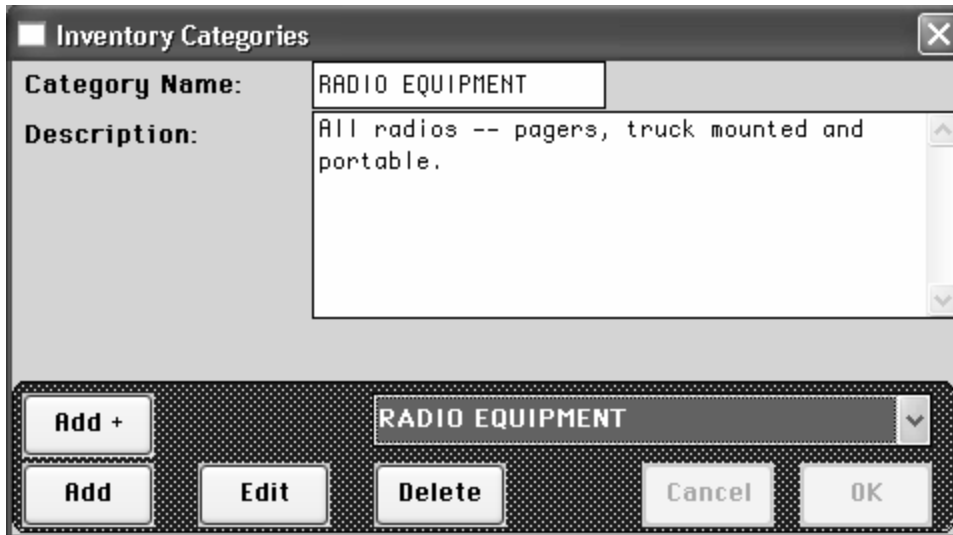
Each of your inventory items should be able to be classified into one of the categories, sub categories and have a location.

Once you have a good list set out, then you’re ready to get started in FirePro!

The first step is setting up the categories

Go to: **Maintenance** → **Edit Pop-up Lists** → **Inventory** → **Categories**

The use of categories facilitates fast record retrieval and enables you to create reports for particular inventory subsets. Inventory items should be classified under logical categories such as "Vehicles", "Protective Clothing", "Radio Equipment", "SCBA's", etc. This is where the list of inventory categories that is appropriate for your department can be created.



The screenshot shows a dialog box titled "Inventory Categories". It has a "Category Name" field with the text "RADIO EQUIPMENT" and a "Description" field with the text "All radios -- pagers, truck mounted and portable." Below the fields are several buttons: "Add +", "Add", "Edit", "Delete", "Cancel", and "OK". At the bottom of the dialog, there is a dropdown menu showing "RADIO EQUIPMENT" selected.

Category Name

Enter a descriptive, but generic title for each category

Description

Optionally, enter a short description of what will be found within this category.

The next step is setting up the sub-categories. Go to:

Maintenance → Edit Pop-up Lists → Inventory → Sub-Categories

Create or edit your list of optional inventory subcategories. FirePro 2 gives you the option of creating further classifications within a "category", thus making them easier to find. The sub-categories also allow you to assign a maintenance service schedule to each sub-category.

Radio equipment may be broken down to pagers, handheld, and truck mounted.

The screenshot shows the 'Inventory Sub-Categories' window. The 'Category' dropdown is set to 'RADIO EQUIPMENT'. Below it, a note reads 'All radios -- pagers, truck mounted and portable.' The 'Sub-Category' field contains 'HANDHELD RADIOS' and the 'Description' field contains 'Handheld portable radios'. The 'Service Schedule' table is as follows:

Type	Months	Advance Notice
replace battery	48	1 Months
	0	0 Months
	0	0 Months
	0	0 Months

At the bottom, there is an 'Add +' button, a dropdown menu with 'HANDHELD RADIOS' selected, and buttons for 'Add', 'Edit', 'Delete', 'Cancel', and 'OK'.

Note: Any item requiring regular maintenance or testing such as "Trucks" or "SCBA's" should be organized into a sub-category, even if there is only one sub-category for the category (such as "Trucks" below).

The screenshot shows the 'Inventory Sub-Categories' window. The 'Category' dropdown is set to 'TRUCKS'. The 'Sub-Category' field contains 'TRUCKS' and the 'Description' field is empty. The 'Service Schedule' table is as follows:

Type	Months	Advance Notice
oil change	3	1 Months
maintenance	6	1 Months
	0	0 Months
	0	0 Months

At the bottom, there is an 'Add +' button, a dropdown menu with 'TRUCKS' selected, and buttons for 'Add', 'Edit', 'Delete', 'Cancel', and 'OK'.

Category

Choose from the list of categories under which the sub-category will be placed.

Sub-Category

Enter the name of your new sub-category

Description

Optionally enter the description of the new sub-category if needed.

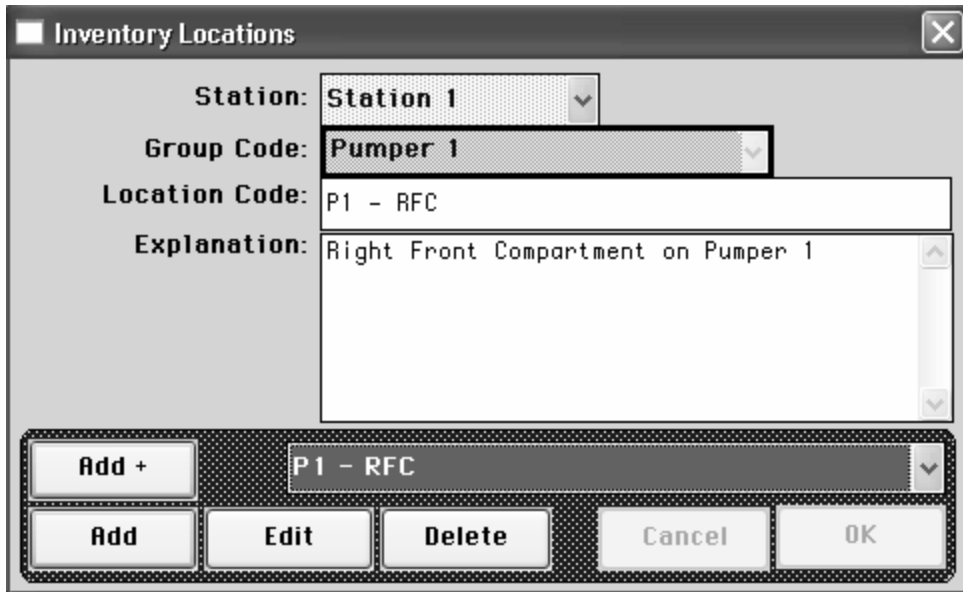
Service Schedule

Enter up to four regular service or testing procedures and the number of months between such procedures. Enter the number of days or months you want the reminder to show before it is due in the Service Schedule box in the Advance Notice section.

Entering the actual date of the last service or testing procedure on the "Inventory Entry" window will generate timely reminders of service/testing dates.

Finally, you need to create a list of locations for your inventory items.
Go to: **Maintenance → Edit Pop-up Lists → Inventory → Locations**

While bigger items such as ladder trucks are hard to misplace, maintaining records on the usual physical location of the thousands of inventory items in your department can be invaluable. Locations can be a truck bay, a truck, or as detailed as a specific compartment on a truck.



Station

Choose the station in which the location exists.

Group Code (optional)

Enter a code for a group of locations. While most fire departments will not find it necessary, this feature does provide an additional means of inventory tracking and reporting.

An example of the use of the Group code would be if you are assigning inventory to specific locations (storage compartments, the cab, etc.) in each of your fire trucks. In this case you would enter the compartment as the Location Code (eg P1-RFC for Right Front Compartment on Pumper 1), and Pumper 1 as the Group Code.

This will enable you to generate a list of all inventory carried on a particular vehicle. In this case the Group Code would represent that vehicle. Thus, although their location codes would vary according to their placement in the vehicle, all inventory items on the vehicle would share the same Group Code.

Location Code

Enter a unique and specific code. This is the main code to represent this location. As this code needs to be unique, you may need to be creative with this code and fill in the explanation, so that everyone will know what it is.

In the group code example above, P1-RFC (representing the Right Front Compartment of Pumper 1) would be the location code.

In the case of larger locations such as "Truck Bay", you may you might want to include the station number or other identifying characteristic (i.e.: 01 - Truck Bay).

Explanation

Enter a more complete description of the location if desired. For example, Right Front Compartment on Pumper 1, or Truck Bay in #1 Station

Entering Your Inventory Items

Once you have your categories, subcategories and locations defined, you can enter inventory items.

The inventory Entry Window is accessed through the FirePro 2 menu.

Go to: **FirePro 2 → Inventory**

Type	Last Serviced	Schedule	Service Due
oil change	JUN 5 06	every 3 months	SEP 5 06
maintenance	JUN 5 06	every 6 months	DEC 5 06

Categories

Select the category from the list – these are the categories you defined earlier.

Subcategories

Select a subcategory from the list – these are the Sub-Categories you defined earlier.

Location

Select a location from the list – these are the locations you defined earlier.

Code (custom label)

This will be the primary identifier for the inventory item. Make it as descriptive as possible, as it will be used as the identifier of this individual inventory item in reminders. The Code field may be used as the parameter with which to find an inventory item.

Service Schedule

If you have entered service schedule data for items in this subcategory, the program can automatically calculate the Service Due date. To set up this reminder, enter the actual date on which the item was last serviced under Service Schedule.

For more specifics on the Inventory window, see chapter 24 of the FirePro 2 Manual (you can download the manual online at

<http://www.ingenioussoftware.com/downloadman.htm>)

Hopefully this will take some of the mystery out of setting up inventory items for you!



Quote of the week:

"Trust that little voice in your head that says "Wouldn't it be interesting if..." and then do it." *Duane Michals*