Incident Procurement Database User Guide

IPD_V1

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Contents

Introduction

This database was developed to track purchases for any type of incident made by any purchase card holder, much like the original Buying Team Spreadsheets. This user guide will go over the setup, input, and closeout of the database by incident.

The database is set up to follow the logical progression of tracking buying team members, recording the incident host unit, followed by the orders placed. The user information entered into the system will automatically update a series of canned reports which can be printed or e-mailed to the appropriate receiver.

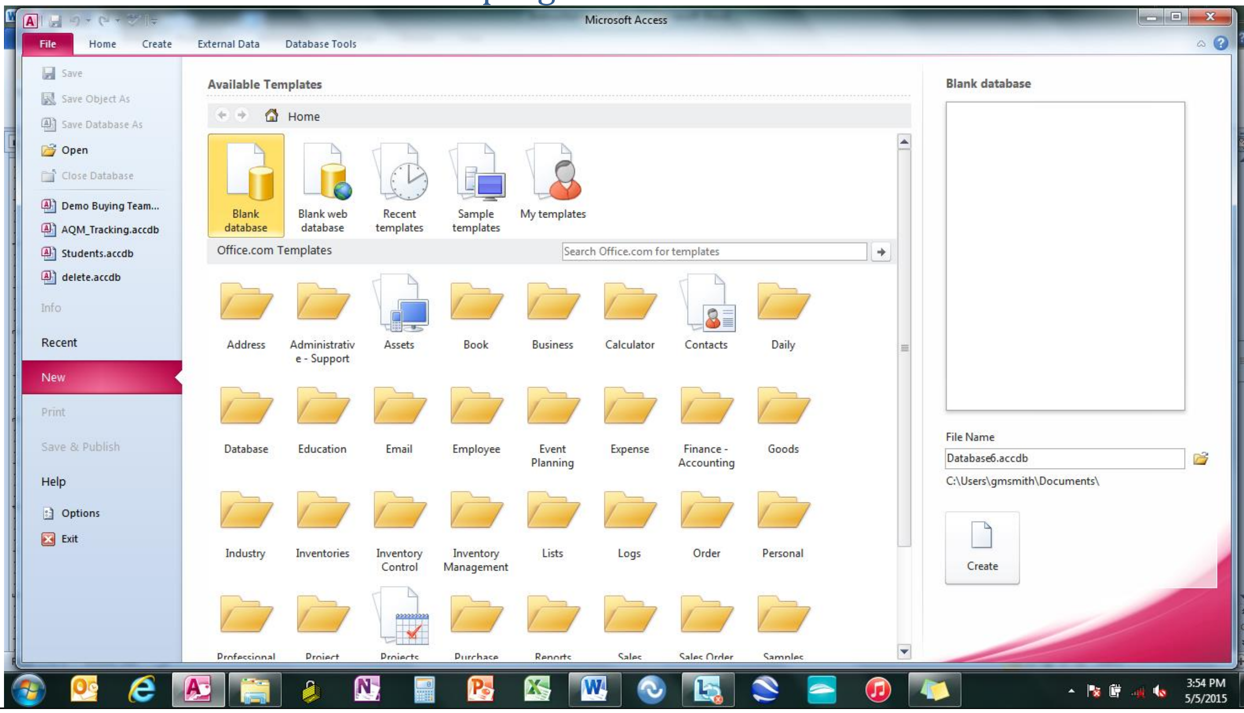
Buttons have been created as either hot links or basic execution functions. All have been labeled for their actual use. All should access information specific to your region or area.

This database has not yet been field tested and this user guide shall be in draft form until actual field implementation is complete. Therefore the information found here will be minimal but will enable the user to perform basic tracking and reporting.

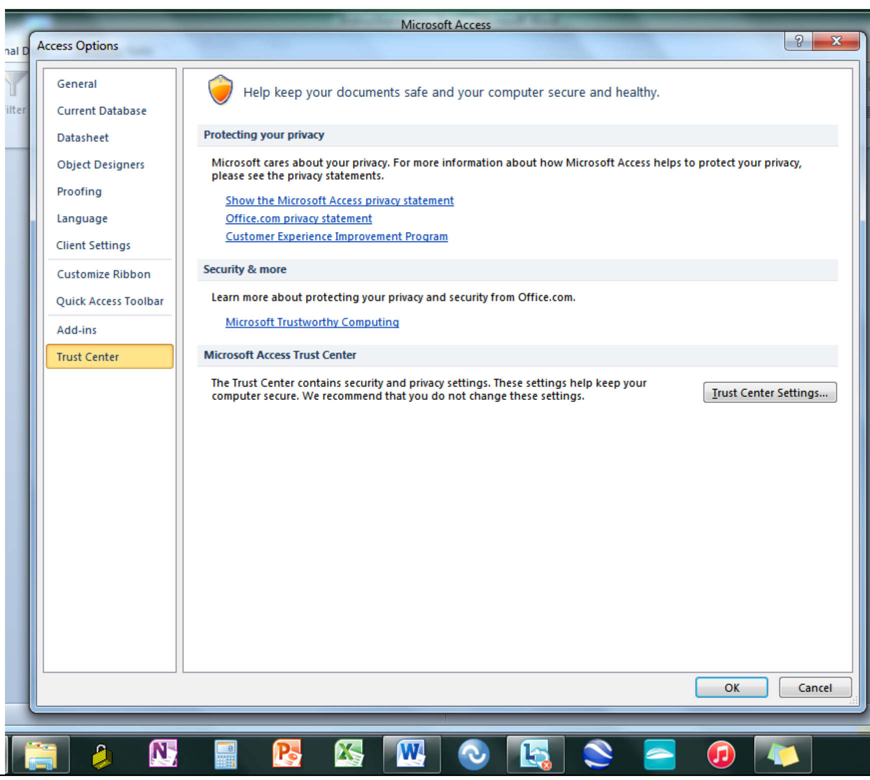
If at any time, this database is too cumbersome or becomes corrupt the user shall have to default back to the national spreadsheets.

Set up

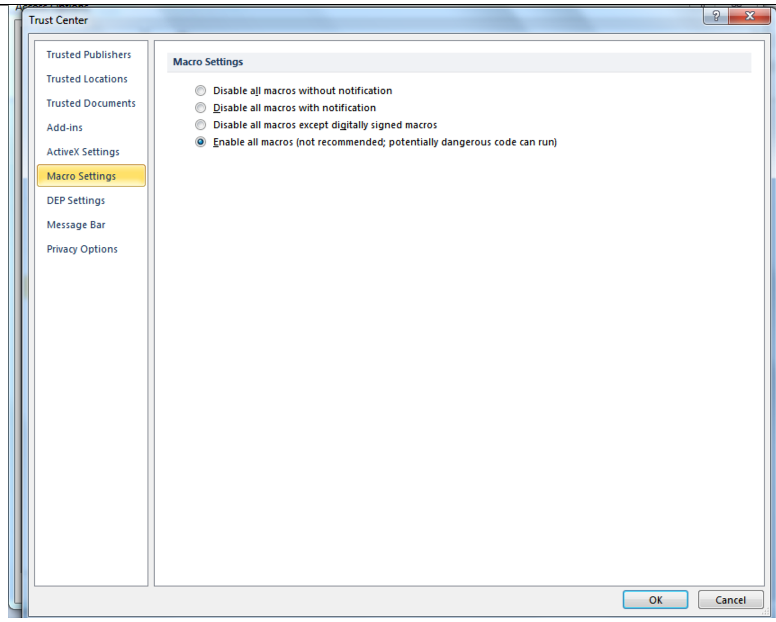
1. Launch the Microsoft ACCESS program



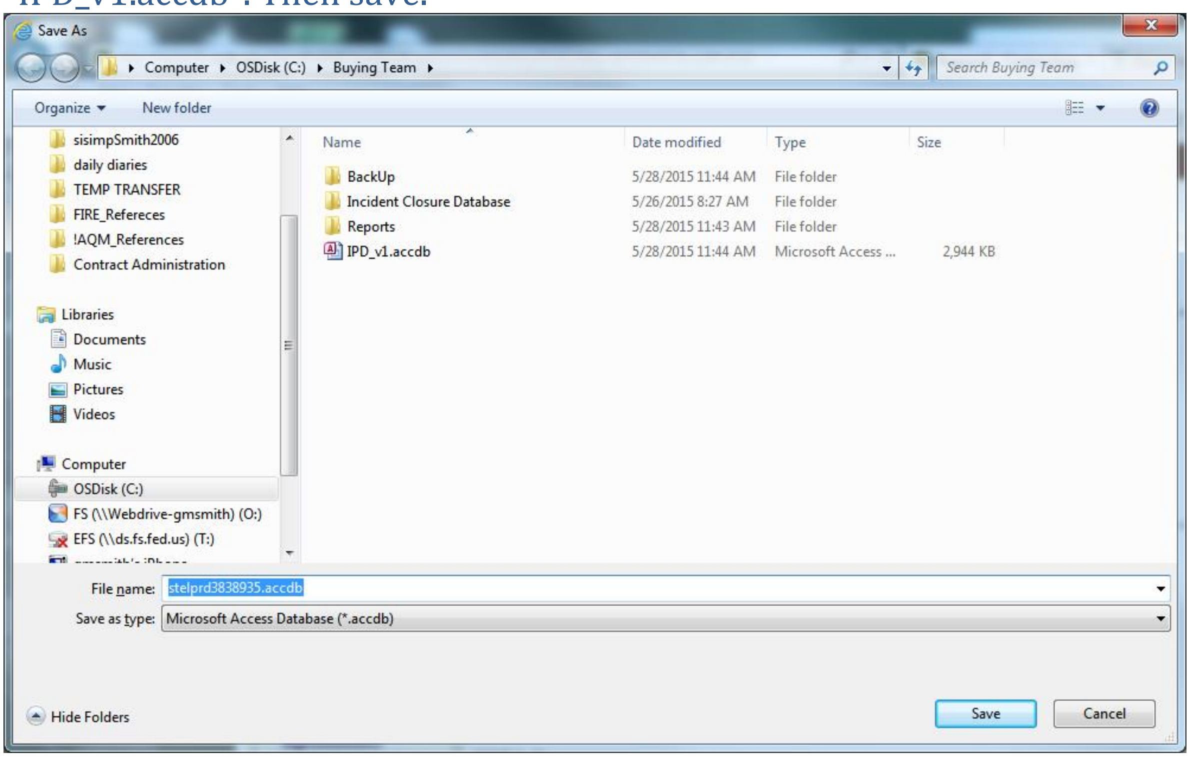
2. Click on “Options” (left side just above “Exit”)
3. Then click on “Trust Center” and click “Trust Center Settings” radio button.



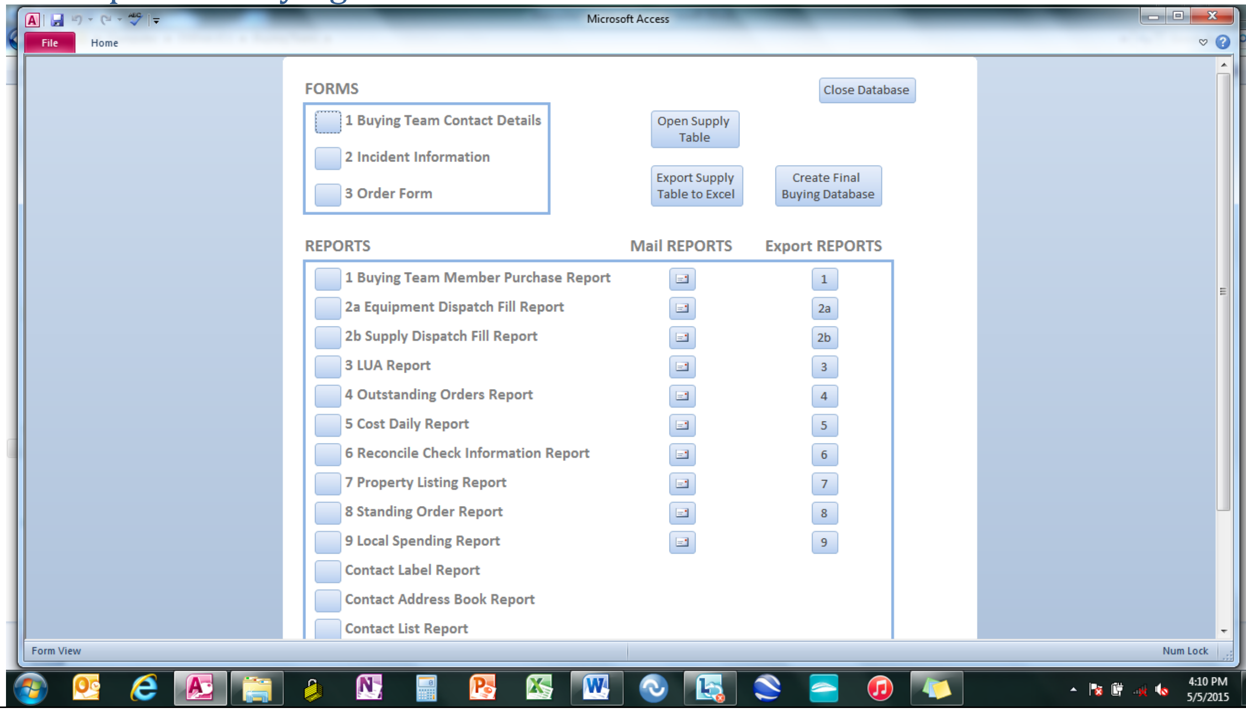
4. Then click on the click on “Macro Settings” and check the “Enable all Macros”



5. Click the “OK” radio button and you are done with the set up.
6. Create a folder on your “C” drive and name it “Buying Team”
7. Download the database from http://www.fs.usda.gov/detailfull/r6/workingtogether/contracting/?cid=stelprdb5356405&width=full . Right Click on the “NEW Buying Team Database” and then select “Save Target as….”
8. Select the “C:/Buying Team” Folder and make sure you rename the database to “IPD_v1.accdb”. Then save.



9. Now open the Buying Team Database and the user should see this main screen.



Input

From the main form start at the number 1 form and fill it out. Then proceed on to the 2nd form and then the 3rd form. The flow of data information in every from is from top to bottom left to right. The information gathered should follow this logical progression.

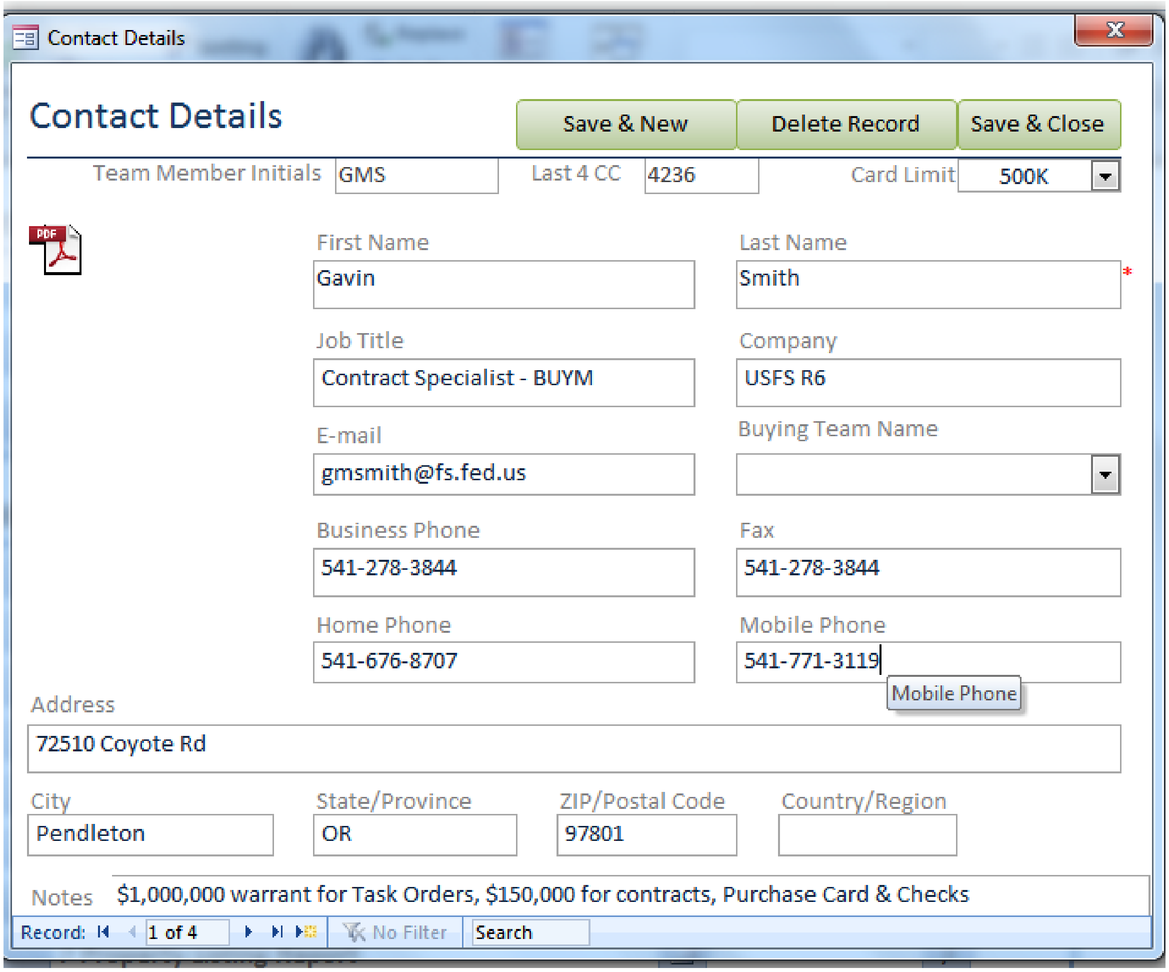
Navigating within a Form

Within the form there is a search function built into the access database and is located at the bottom of the screen on every Form. Simply start typing a description of what you are looking for and the database will start pulling record information. The user can also navigate between records using the arrows around the search field.

The user can also search by Record ID number. This search location is at the top of Input Form 3. Simply type in or pick from a list of unique numbers that match your record. Unique numbers can be found on each of the report modules.

Definitions by Form

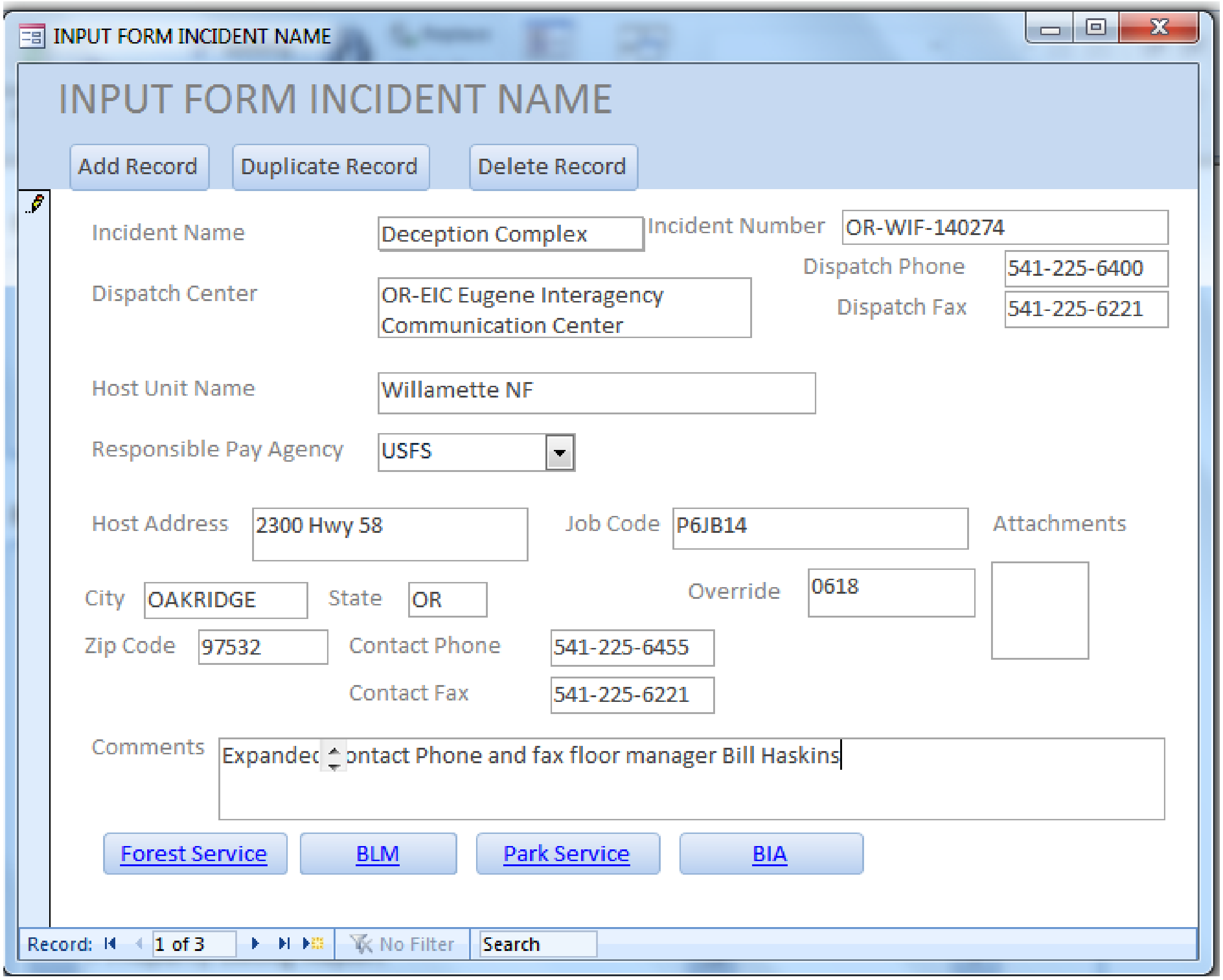
Buying Team Contact Form



Team Member Initials	First initials of the team member's name
Last 4 CC	Last four
Card Limit	For the BUYL
First Name	As shown on the purchase card
Last Name* (mandatory)	As shown on the purchase card
Job Title	Local title as well as IQCS position on the incident
Company	Where the member typically works
e-mail	Main contact e-mail address after the incident is closed
Buying Team Name	Check with your team leader (editable drop down)
Business Phone	Work phone number
Fax	Work Fax number
Home Phone	Personal home phone for emergency contact
Mobile Phone	Best phone number to contact the team member on the incident
Address	Physical duty station address
City	Duty Station City
State/ Province	Duty Station state
Zip/ Postal Code	Duty Station ZIP Code
Country/ Region	Duty Station Country (if applicable)
Notes	Field to capture critical team member information not listed above

Attachments	On the main form where you see the “Adobe PDF” icon in the screenshot above you can double click in that area and add attachments to the buying team member’s profile.

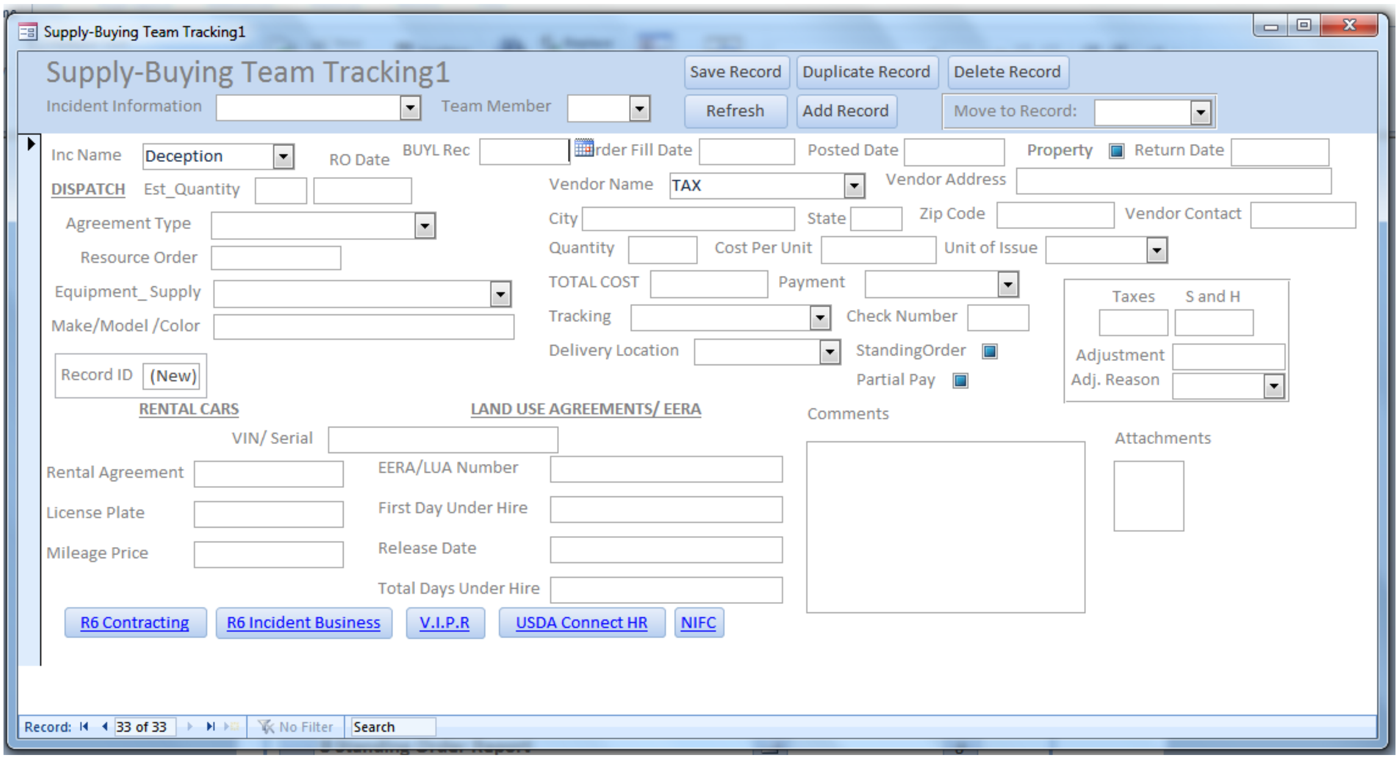
Input Incident Form



Incident Name	Name on the Resource Order
Incident Number	Number of the Resource Order
Dispatch Center	Prime center used by buying team for the named incident
Dispatch Phone	Main call in line
Dispatch Fax	Main FAX at the dispatch center
Host Unit Name	Where the incident is located
Responsible Pay Agency	***Agency who will be the responsible paying unit (editable drop down)***
Host Address, City, State, Zip Code	Address where documentation box will reside
Contact Phone	Primary point of contact ,phone number to call at Host unit
Contact Fax	Primary point of contact , fax number to send information to home unit
Job Code	String of numbers and letters needed for card reconciliation
Override	String of numbers associated with the agency location for card reconciliation
Comments	Field to capture critical team member information not listed above
Attachments	***On the form where you see the “Attachments” in the screenshot above you***

	can double click in that area and add attachments like phone lists maps, ect.
Buttons at the bottom Forest Service, BLM, Park Service, BIA	External web sites to gather addresses, contacts, or local information.

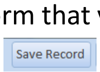
Order Form



Incident Information (Pick)	Responsible paying code identified by Dispatch fire number
Team Member (Pick)	Member who the Resource Order is assigned to
Incident Name	***Name of incident user can add other names as needed (once entered it is not editable in the drop down)***
DISPATCH SECTION	
Estimated Quantity	Block 12 Quantity requested on the Resource Order
RO Date	Block 12 first Date in this section on the Resource Order
Agreement Type	Four options from pick list
Resource Order	Block 12
Equipment Supply	ROSS Catalog list
Make/ Model/ Color	255 character description of purchase
RESOURCE ORDER DATES & UNIQUE PURCHASE INFORMATION	
BUYL Rec Date	Date the team leader received the requisition
Order Fill Date	Date the purchase was actually made
Posted Date	Date the waybill is received from the receiving unit
Property	Radio button if “checked” this purchase will show on Report #7
Return Date	Date the property was returned to the receiving Unit
PURCHSE/ VENDOR INFORMATION	
Vendor Name	***Name of store or vendor (once entered it is not editable in the drop down)***

Vendor Address	Business address or Physical Location
City	City of Purchase
State	State of Purchase two letter abbreviation
Zip Code	Five Digit Code
Vendor Contact	Open field for phone number and/or name
Quantity	Number or items purchased
Cost Per Unit	Unit cost based on Quantity field
Unit of Issue	***Based on initial "Estimated Quantity" (once entered it is not editable in the drop down)***
Total Cost	Calculated field (Quantity*Cost Per Unit) + (Taxes+Shipping and Handling+Adjustments)
Payment	***Method of pay (once entered it is not editable in the drop down)***
Tracking	Method of documentation
Check Number	Unique Number off the check
Delivery Location	***Location where item is delivered or resides while on the incident (once entered it is not editable in the drop down)***
Standing Order	Radio Button that will report this item in report #8
Partial Pay	Radio Button that will show on a future report
Taxes	If taxes are paid and should not be part of the Cost per Unit
S and H	If shipping and handling are required and should not be part of the Cost per Unit
Adjustment	If there are any discounts or other fees not listed at taxes or S&H. This can be positive or negative in this field.
Adj. Reason	Documentation for reason of adjustment.
RENTAL CAR & LAND USE AGREEMENTS	
VIN/ Serial	Unique number of the piece of equipment or vehicle
Rental Agreement	If there is a unique rental agreement number to reference
License Plate	Indicate state information and unique number
Mileage Price	If a rental vehicle is used then the overall price per mile
EERA/ LUA Number	Agreement Number generated for each piece of equipment or land rental
First Day Under Hire	First day costs are incurred under that agreement
Release Date	Last day this resource is under hire
Total Days Under Hire	Calculated field (Release Date- First Day)
Comments	255 character field
Attachments	Double Click to add any electronic data to this record.

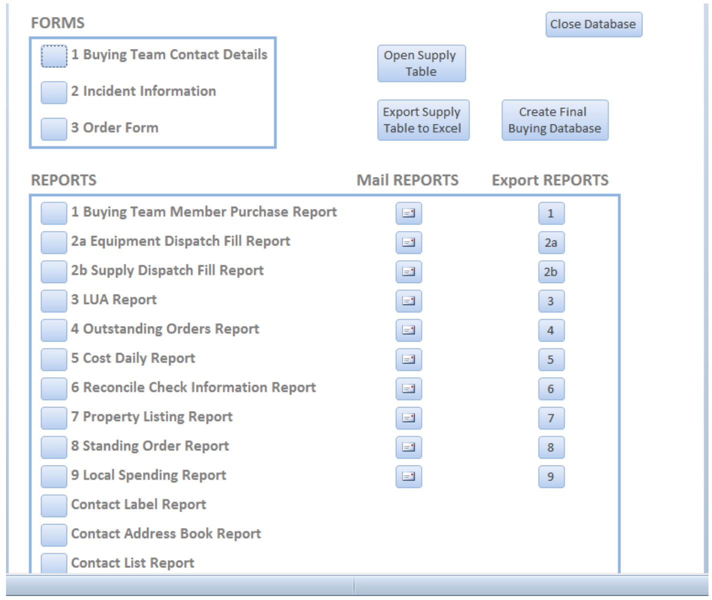
Close Out

If the form that you are on has the option for saving then do so by either clicking the blue "save" button or if there is a hot link 

then use it. Additionally, to ensure the Reports are updated the user should click on the "Refresh" button on any form they are currently using.

Whenever the user has the option to close out the database or the form they are currently using, they should use any "Save and Close" radio buttons if they are available. If none are available the user should always save before closing.

On the Main form (the one with the report modules) there is a "Close Database" button, this radio button will save, close, and backup the database. If the user closes the database without using this button the database will not be backed up.



The "Create Final Buying Database" button on the main form allows the user to create a final database which can be shared widely and easily without having to initiate the setup steps found in this user guide.

Reports/ Backup Folders

The main page has a list of reports which are named as described. Example; "Equipment Dispatch Fill" will return all records related to equipment assigned to that incident. The reports can be e-mailed or exported using the radio buttons to the right of each category.

When e-mailing the report, the system is set to use Microsoft Outlook, other e-mail systems will not be able to use the e-mail function in the reports. When exporting the report the user will click on the report to export and it will be created and stored in the "Reports" folder which is in the Buying Team Folder located on the "C" drive. Every time the report button is used it will overwrite the current report that is in the folder. Therefore, the user should rename the reports generated in this folder to avoid overwriting if they choose.

The "Cost Daily Report" has parameters associated with the data which it will generate. The User will be prompted to enter the incident name (block in Form 3 which is a user fill in) and identify the date range for tracking purchases. This report date range shall be based on the "Posted Date". If this field is not filled in no records will return.

The Backup Folder will house the database every time the database is closed by the user and will date stamp the version that is created. If the main database is corrupt the user will have to delete the "IPD_v1.accbd" database and then rename the previous version with the "IPD_v1.accbd" name and save it in the main "Buying Team" folder.

Summary

If there are any questions or issues please call 541-278-3844 or e-mail gmsmith@fs.fed.us