



Phoenix Training Workbook

Activity Log (Fire)

Table of Contents

- Overview 3**
- Purpose 3**
- Prerequisites 3**
- Equipment and Materials 3**
- Instruction 3**
- Activity Search 4**
- Activity Entry 6**
 - Global Approval 7*
 - Activity Status 9*
- Quick Activity Entry 10**
 - WDA Quick Activity Log 11*
- Whiteboard 12**
 - Lab 1 15***

Overview

The Phoenix Training Workbook is designed to afford users the opportunity to follow along with the course of instruction and provides ample space for note taking on key elements of the program. This Workbook will accompany the course of instruction related to the Activity Log. Students will learn how to use the Activity Log feature to track and complete assigned tasks and other activities in Phoenix Fire RMS. They will also learn how to use the Activity Entry feature in WDA.

Purpose

Familiarize users with all of the Activity Log function in Phoenix Fire RMS so that they may more easily track activities and tasks in Phoenix.

Prerequisites

A good understanding of Microsoft Windows with basic keyboard and mouse skills.

Equipment and Materials

Desktop or laptop computer with access to the Phoenix application, training workbook, and additional note taking equipment (optional).

Instruction

Upon completion, students will knowhow to create an activity entry. They will have an understanding of system generated activity log entries and how to search for and update them. Students will learn how to enable and use the global approval process for any activity type. Students will understand activity status (e.g., scheduled, completed) and how to update the status of an activity entry. Students will also learn about using the My Home > My Reminders screen to track and complete assigned activities. They will learn about Quick Activity Entry, and how to use the Activity Entry feature in WDA.

Activity Search

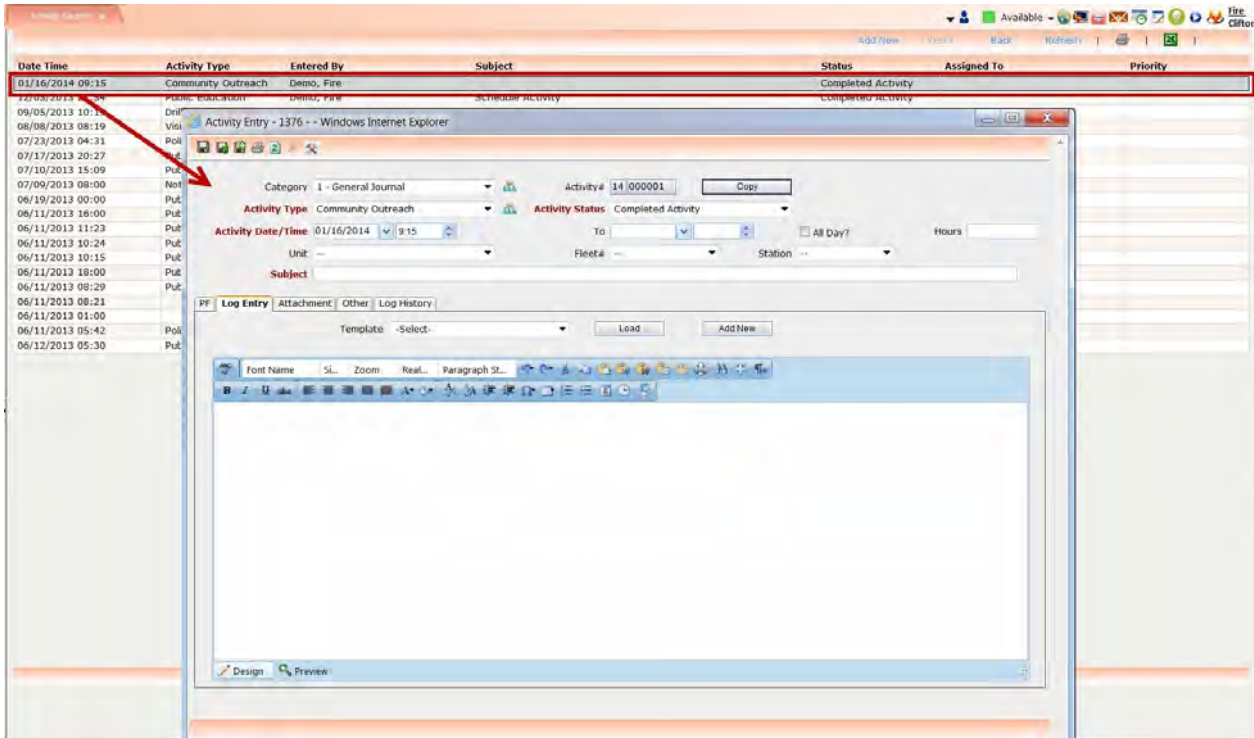
In Phoenix Fire RMS, select Home > Activity Search (1383).

Existing activity entries can be searched based on a variety of parameters including Activity Type, Activity Period, and Assigned Status.

- System generated records
 - Incidents
 - Inspections
 - Training (Student status values)
 - Update/Delete source records (e/g., Incident, Inspection)
- Other User defined criteria

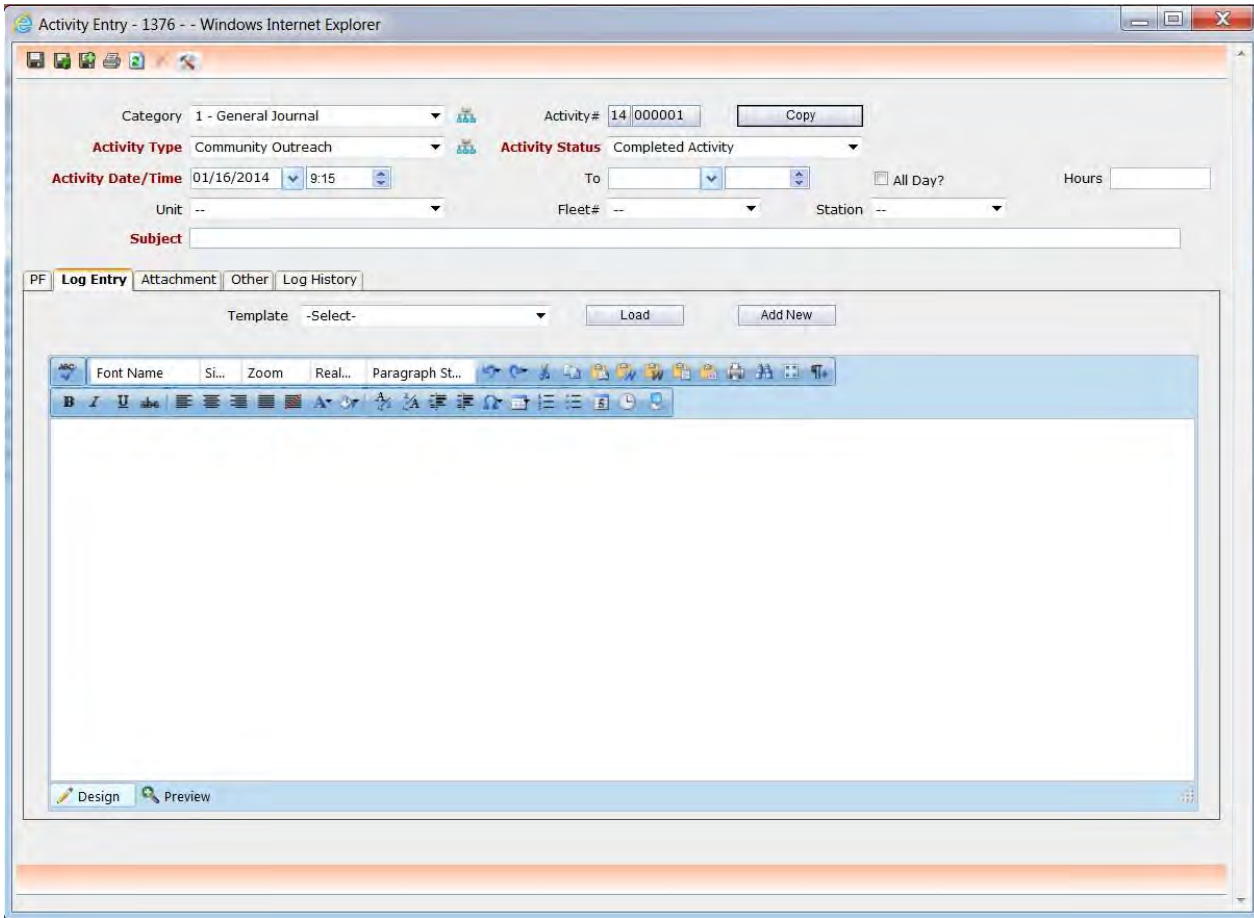
Search results will be shown in the grid.

Click on an activity in the grid to open that Activity Entry (1376).



Activity Entry

To enter a new activity entry, select Home > Activity Entry or click on **Add New** on the Activity Search screen. A new Activity Entry screen (1376) will open.

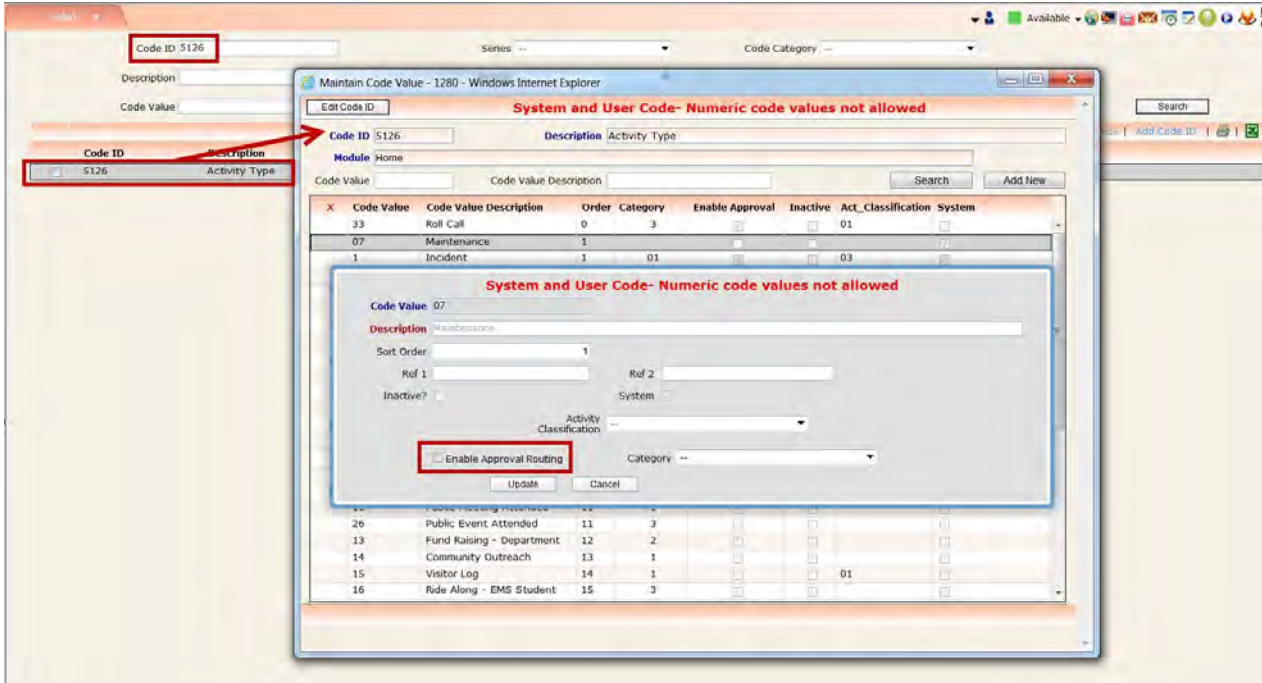


The screen and tabs shown will dynamically load as needed based on the **Activity Type** selected.

Global Approval

Global approval can be enabled for each individual Activity Type by configuring Coded ID 5126 (Activity Type).

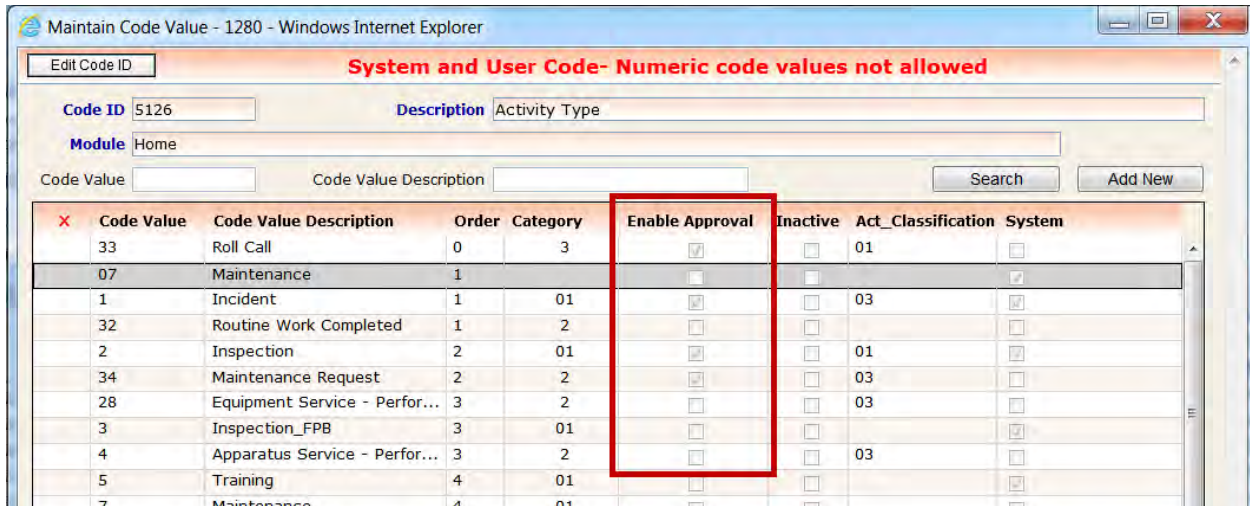
Select Settings > Coded (1221). Search for and open the record for Coded ID 5126.



Click on a code value in the grid to view the settings for that value.

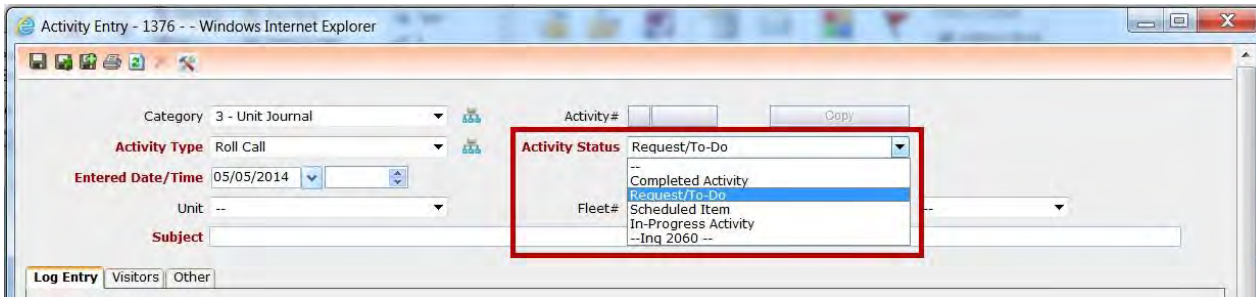
To enable global approval for that activity type, select the **Enable Approval Routing** checkbox and then click on the **Update** button to save the change.

The Enable Approval column of the grid will show which code values are enabled for approval.



Activity Status


The status of an activity log entry can be updated to indicate the current status of that activity.

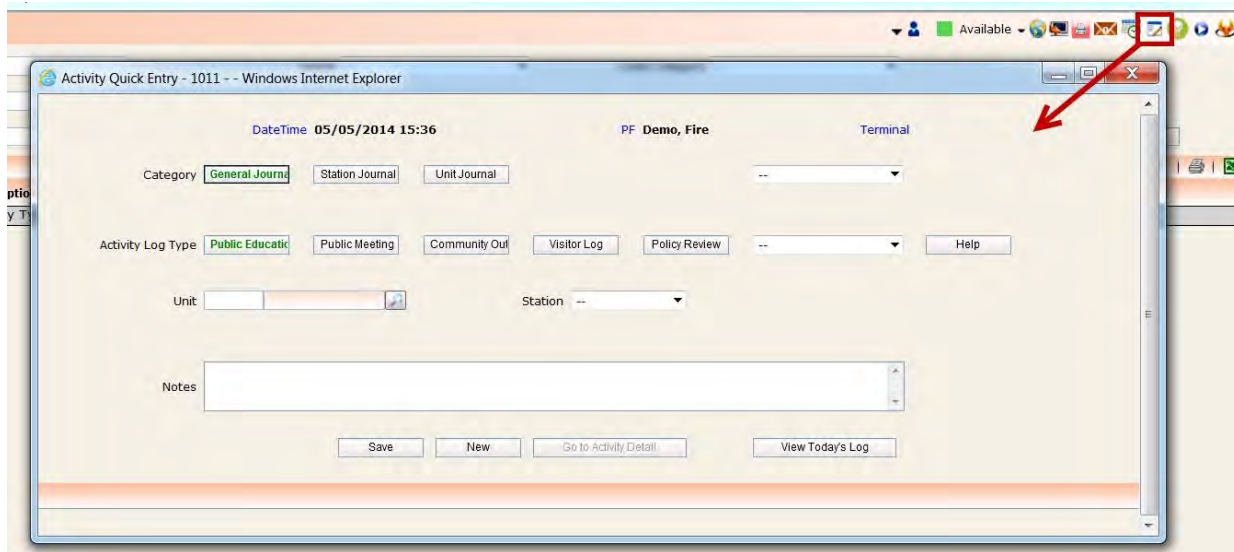


- Completed
- Scheduled
 - Open schedule date/time
 - PF#s requested will get a My Home > My Reminder tab notification, and will receive an email notice.
- Request/To-Do
 - PF#s requested will get a My Home > My Reminder tab notification on the Activity tree level.
- Activity status can be changed/updated
 - The updated record will follow the logic accordingly (e.g., updated from Scheduled to Completed status).

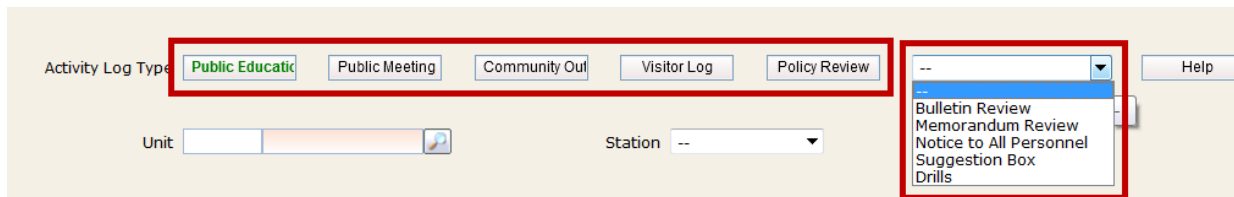
Quick Activity Entry

The Quick Activity feature provides an abbreviated Activity Entry function for quicker activity entry.

Press **F4** or click on the Quick Activity  icon located in the top right corner of the Fire RMS screen. The Activity Quick Entry screen (5086) will open.



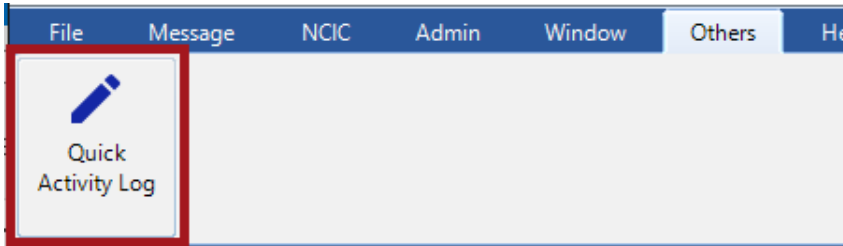
Up to five activity categories (in sequence order) are displayed as buttons, and any additional activity categories are included in the dropdown to the right of the **Category** buttons.



WDA Quick Activity Log

The quick activity entry function is also available in WDA.

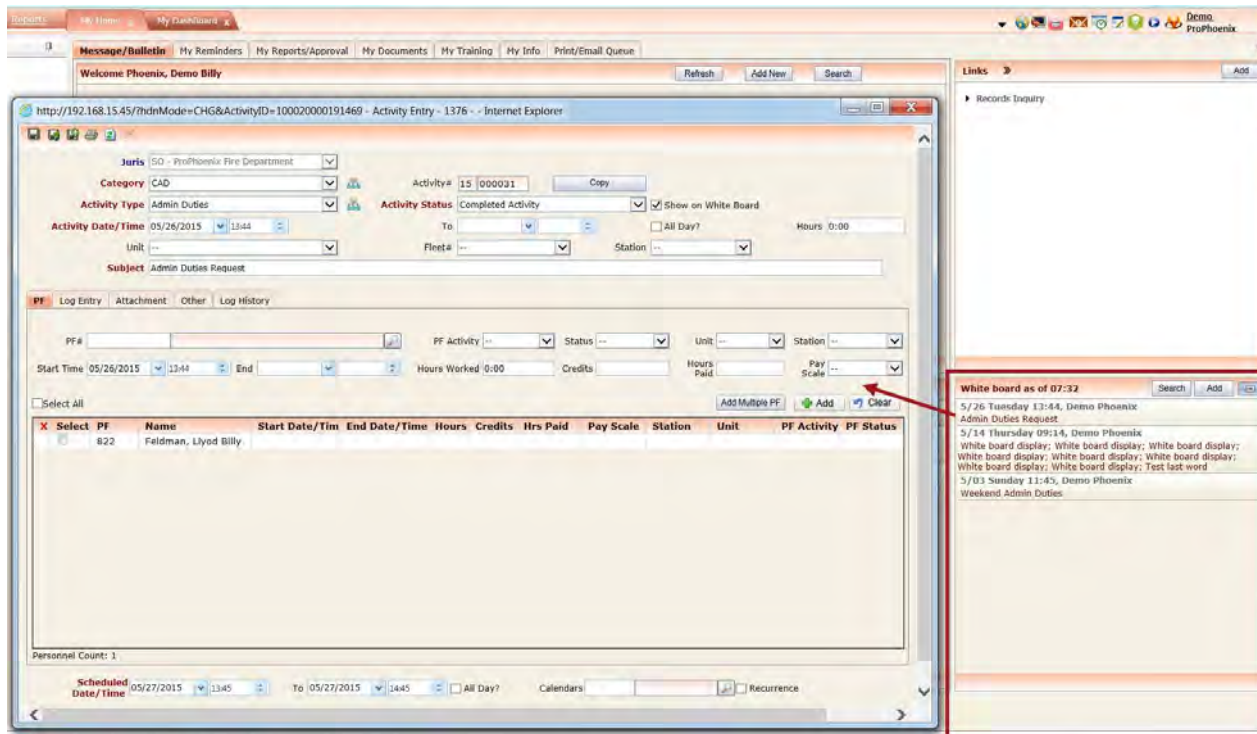
Select **Log > Activity Log** or press **Shift + F9** to open the Quick Activity Log screen.



The Quick Activity Log screen will open in a new window.

A screenshot of the 'Quick Activity Log' window. At the top, it shows 'Unit#' SAR3, 'DOMESTIC VIOLE', 'PF#' SAR3, and 'SARANYA, M'. Below this is a 'Category Group' section with buttons for 'Category Group 4', 'Jail Cell', 'Oliver', and 'Q34123', along with a 'Select Category' dropdown. The 'Category' section has a 'Category 4' button. The 'Activity Type' section has a 'Test' button. There is a 'Notes' text area, a 'Location' field, and a 'Show on Whiteboard?' checkbox. At the bottom, there are 'Start Timer', 'OR Enter', 'Start DateTime' (with a dropdown set to '(none)' and a time field), 'End DateTime' (with a dropdown set to '(none)', a time field, and 'Hours' field), 'Save', 'Cancel', and 'View My Logs' buttons.

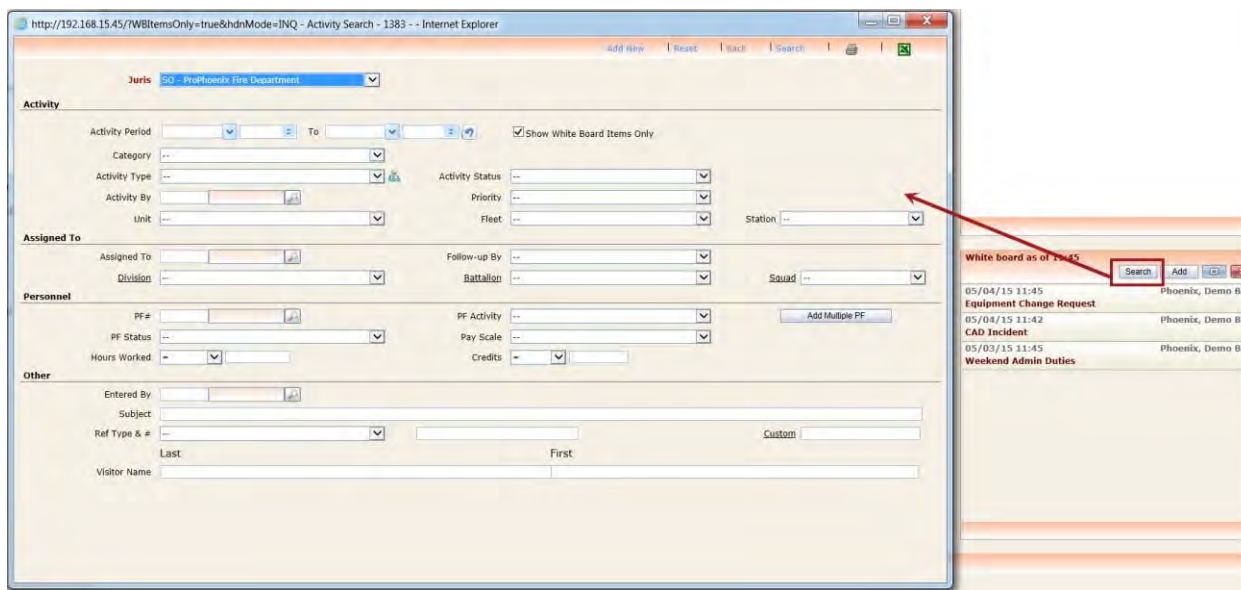
Whiteboard



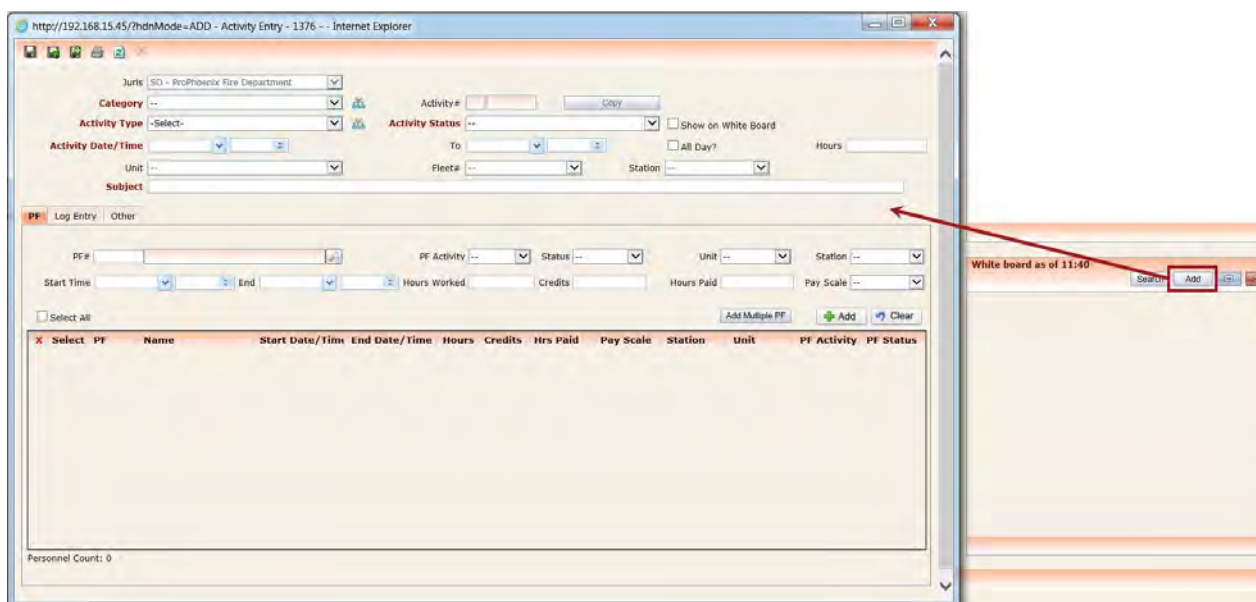
The Whiteboard will show all recent Activity Entries created in RMS that have been configured to show in the whiteboard, in chronological order.

To view details on an activity shown in the Whiteboard, click on that item in the grid. The Activity Entry record (1376) for that activity will open.

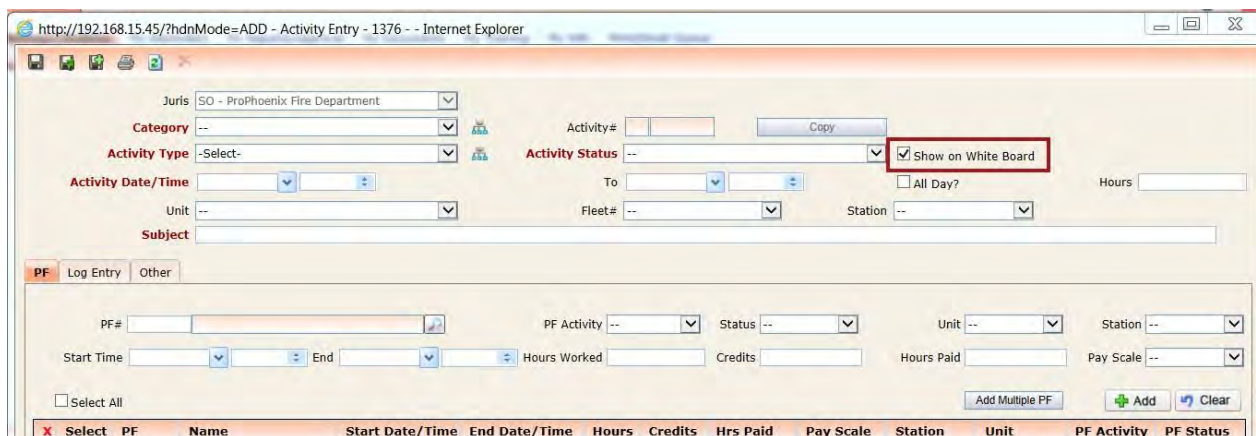
To search Whiteboard activity entries, click on the **Search** button to open th Activity Search screen (1383) in a new window.



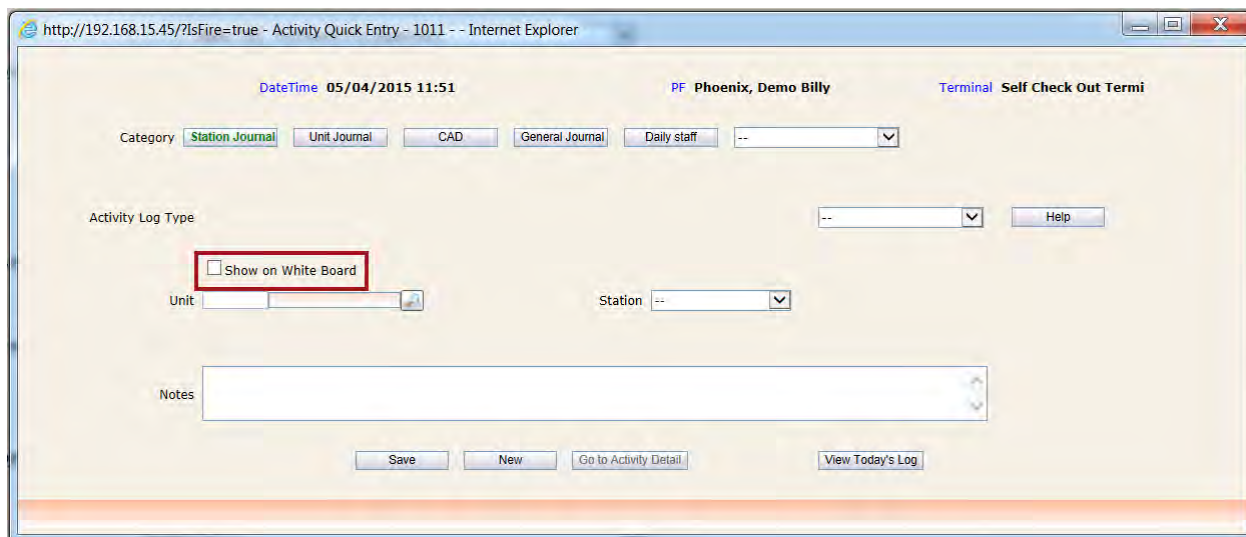
To enter a new Whiteboard Activity Entry, click on the **Add** button on the Whiteboard. A blank Activity Entry screen will open.



To have an activity shown on the Whiteboard, the user must select the **Show on White Board** checkbox when creating the Activity Entry.



The Activity Quick Entry screen (1011) also includes a **Show on White Board** checkbox.



Lab 1

1. Open the activity Search screen.
 - a. Search for activity entries with a status of **Request/To-Do**.
 - b. Open one of the activity entries in the search results grid.
 - c. Enter text in the Log Entry tab.
 - d. Save and close the Activity Entry.
2. Create a new Activity Entry.
 - a. Activity Type: Drills
 - b. Activity Status: In-Progress Activity
 - c. Activity Date/Time: Enter a future date and time
 - d. Subject: Drill
 - e. PF Tab: Enter your own PF#
 - f. Save and close the Activity Log Entry.
3. Go to the My Home screen > My Reminders tab.
 - a. Locate and view the Drill activity entry created above.
4. Use the Activity Search screen to locate a Requested/To-Do activity.
 - a. Open the Activity Entry and update the status to Completed.
5. Create a Quick Activity Entry.
 - a. Category: General Journal
 - b. Activity Log Type: Visitor Log
 - c. Notes: Enter the names of two visitors.
 - d. Save the Quick Activity Entry.
6. Create a new Activity Log Entry using the Whiteboard.