



REGIONAL DISTRICT of Fraser-Fort George

FDM RMS User Guide

Basic Navigation & Use

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Administrator Contacts

We are very happy to receive your feedback. Please direct all your questions, comments and requests to one of the following:

fire@rdffg.bc.ca – Recommended method. Emails are monitored by all FDM administrators.

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Introduction

FDM RMS is a records management system (RMS) that allows you to record details about your department and its activities. The system is managed by the Regional District of Fraser-Fort George. FDM RMS is linked to the FDM CAD (computer aided dispatch) system used by the Fire Operations Communications Centre (FOCC). Incidents from FDM CAD are automatically transferred to FDM RMS where you have the ability to provide additional information and notes for your own record-keeping.

Overview

FDM RMS is divided into “modules”. We currently offer 6 modules, but not all may be relevant to your department.

Module	Description
Personnel (PRS)	Track details of your members.
Incidents (INC)	Record details of incidents you respond to.
Training (TRN)	Track training, courses, workshops, etc.
Other Events (EVNT)	Track volunteer activities (e.g. data entry, equipment maintenance, etc.)
Properties (PRF)	Track details of businesses in your response area.
Inspections (INS)	Schedule and record property inspections.

Use this guide to help you learn the basics of FDM RMS: how to navigate through the program and enter your data. Please refer to the specific documentation for each module for more information on what it can do.

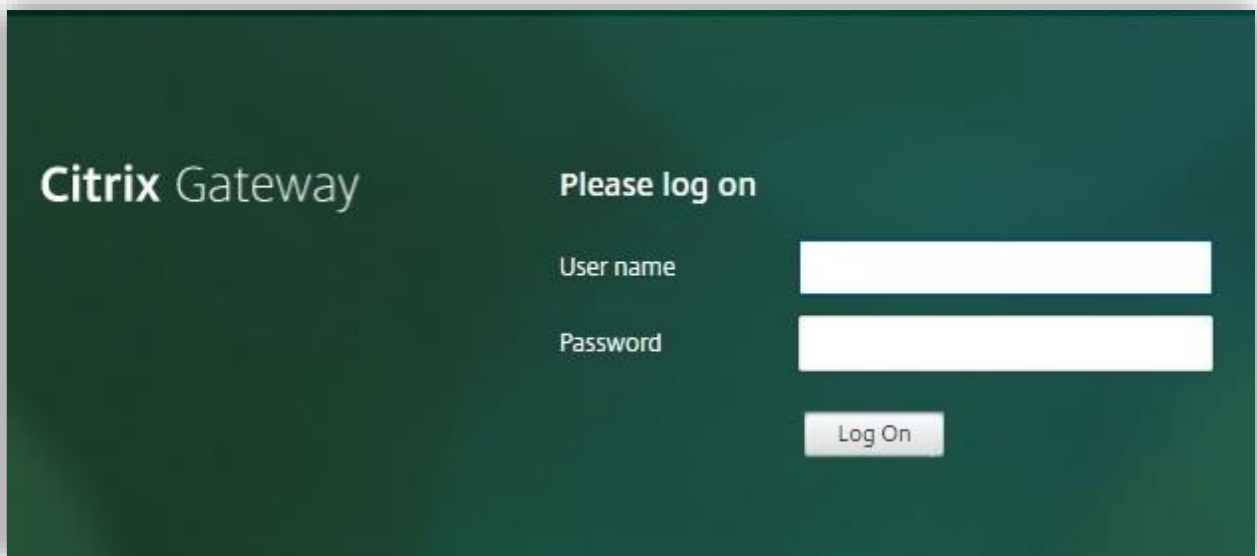
1 Logging In

You will access FDM RMS through an internet browser. Two logins are required. The first logs you into a Citrix “portal” that gives you access to the FDM RMS program icon. The second logs you into FDM RMS itself. Contact your FDM administrator to receive your accounts.

NOTE: Your Citrix account is shared between all FDM RMS users from your department. Only one computer can be logged in to this account at a time.

1.1 Log in to Citrix

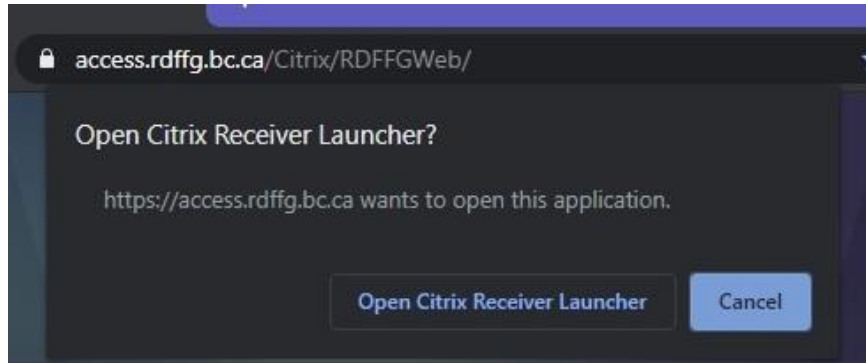
1. Open an internet browser.
2. Go to the website <https://access.rdffg.bc.ca>



3. Enter your Citrix username and password and click Log On. Click “Detect Receiver” if prompted.

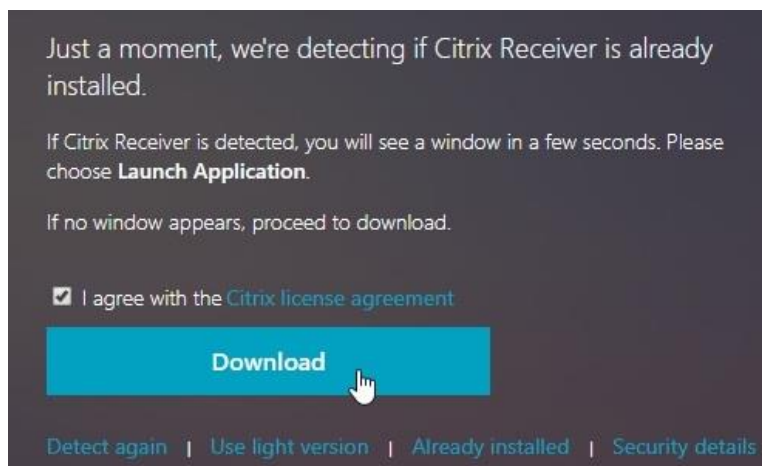


- (1) If Citrix is installed, you might be prompted to open the Citrix Receiver Launcher. Click “Open Citrix Receiver Launcher”. Some browsers skip this step and take you right to the Citrix apps screen.



(2) If Citrix is NOT installed, you will not receive the “Open Citrix Receiver Launcher” message. Do the following:

- a. Check the box to agree with the Citrix license agreement.
- b. Hit “Download” to download the Citrix Receiver app.



- c. Click on the file once it is downloaded to run the installer.

NOTE: If you know the Citrix Receiver app is installed and you aren't prompted to open the Citrix Receiver Launcher or taken directly to the apps screen, click the “Already Installed” link.

- d. On the first screen click “Start”.
- e. Accept the license agreement and click “Next”.
- f. Accept all default settings. Click “Install”.
- g. When the installation is successful, click “Finish”. You do not need to add an account.
- h. Restart your computer when prompted.

- i. Log back in
- j. Click “Open Citrix Receiver Launcher if prompted.

NOTE: You may not have the computer privileges to install programs on your computer. If this is the case, contact your IT department for assistance.

1.2 Passwords

1.2.1 Password Requirements

Citrix:

- Expires after 6 months. You WILL NOT be prompted to change it. We suggest logging in monthly and resetting your password to keep it active. See: [Change your Citrix Password](#)
- Your password must meet these requirements:
 - At least 10 characters long
 - Contain characters from three out of the four following categories:
 - Uppercase letter(s) (A through Z)
 - Lowercase letter(s) (a through z)
 - Number(s) (0 through 9)
 - Special character(s) (e.g. !, \$, #, %, etc.)
 - Cannot contain your username

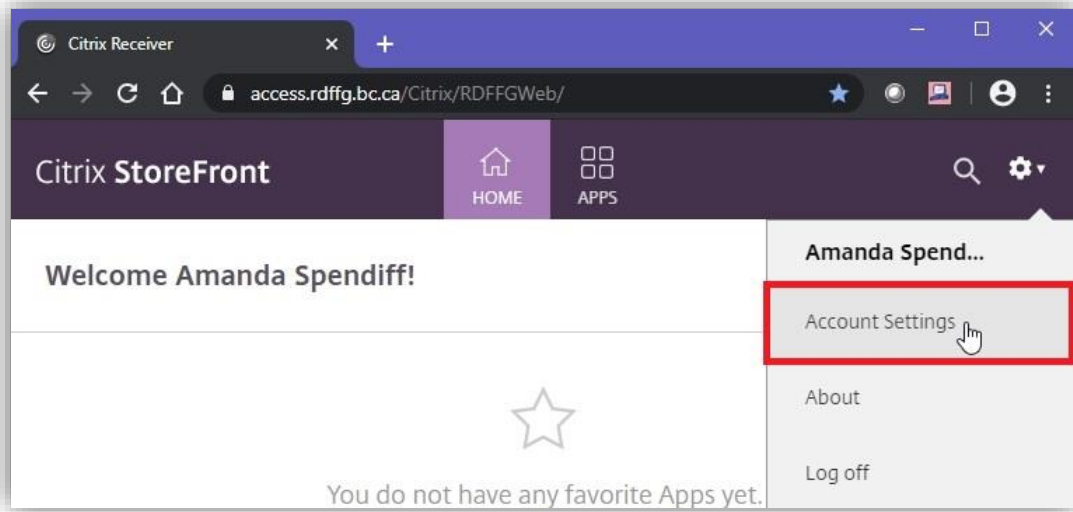
FDM RMS:

- Expires after 3 months. You will be prompted to change your password before it expires.
- Your password must meet these requirements:
 - Cannot contain your account’s first or last name

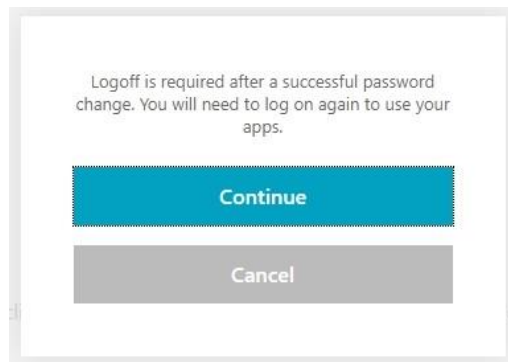
You have 5 attempts to enter your password before the account is locked out. If this happens, please contact your [FDM Administrator](#).

1.2.2 Change your Citrix Password

1. Click on the arrow beside your username, go to “Account Settings” and click and select “Change password”.



2. Click "Continue" when you are warned that you will have to log out and log back in after your password is changed.



3. Type in your old and new password. Click Ok.

Change Password

User name: rdfg.bc.caspendiff

Old password:

New password:

Confirm password:

4. Click Ok.

Your password has been changed successfully.

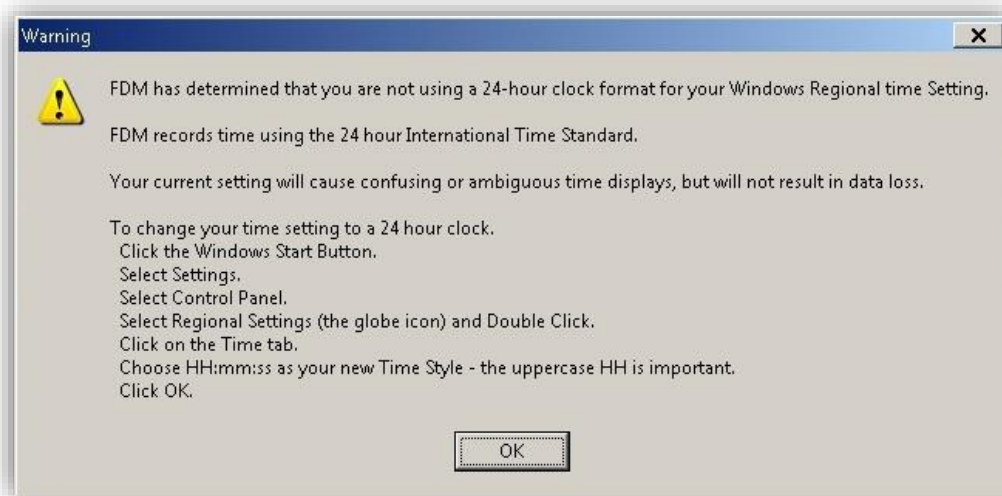
5. Click Log On. Log in with your new password.

Logoff error

If any apps are still running, please exit them manually.

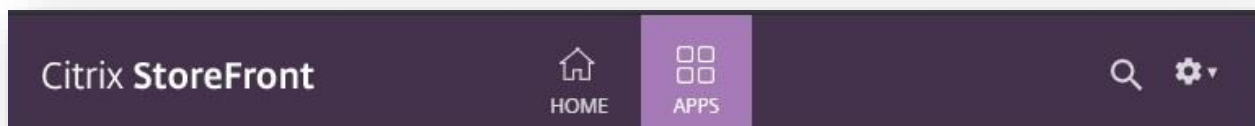
1.2.3 Citrix Date/Time Settings

FDM RMS requires a specific date/time format in Citrix. This should be automatically set for you. If you receive the warning message below when you log into FDM, please contact your [FDM Administrator](#) to resolve the issue. Some RMS modules will not be accessible.

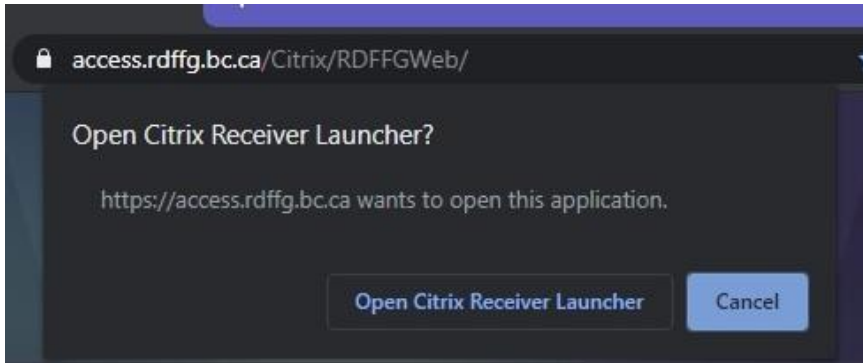


1.3 Log in to FDM RMS

1. [Log in to Citrix.](#)
2. Single-click "Apps".



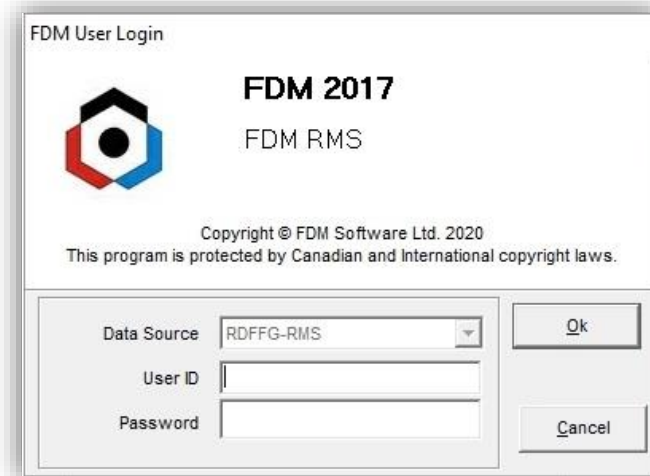
3. Single-click on the FDM RMS icon.
4. If prompted, click "Open Citrix Receiver Launcher". You may not be prompted to do this depending on which browser you use.



5. Accept the Network Usage Agreement



6. A log in window will open.



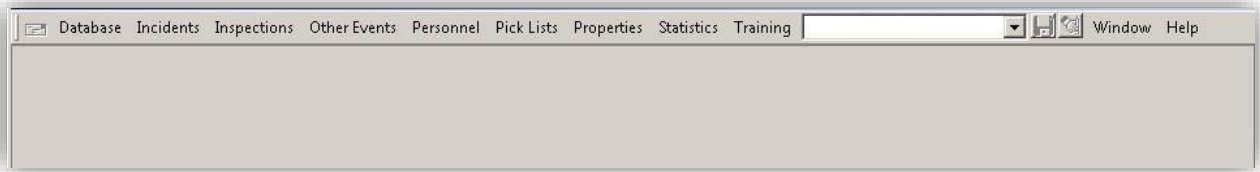
7. Enter your RMS username and password.
8. Click Ok.

For first time users or if you've had your password reset:

9. FDM RMS will ask you to change your password. Type in your new password and click Ok.

2 FDM RMS Overview

After logging in to FDM RMS you will see a grey screen with a menu bar across the top. Each module has a menu. You will only see menus for the modules you have access to.



2.1 Change your FDM RMS Password

Once you've logged into FDM RMS, you can change your password at any time.

1. Click on the Database menu.
2. Click on Change Password.
3. Enter your current password and your new password.
4. Click Ok.

3 Views

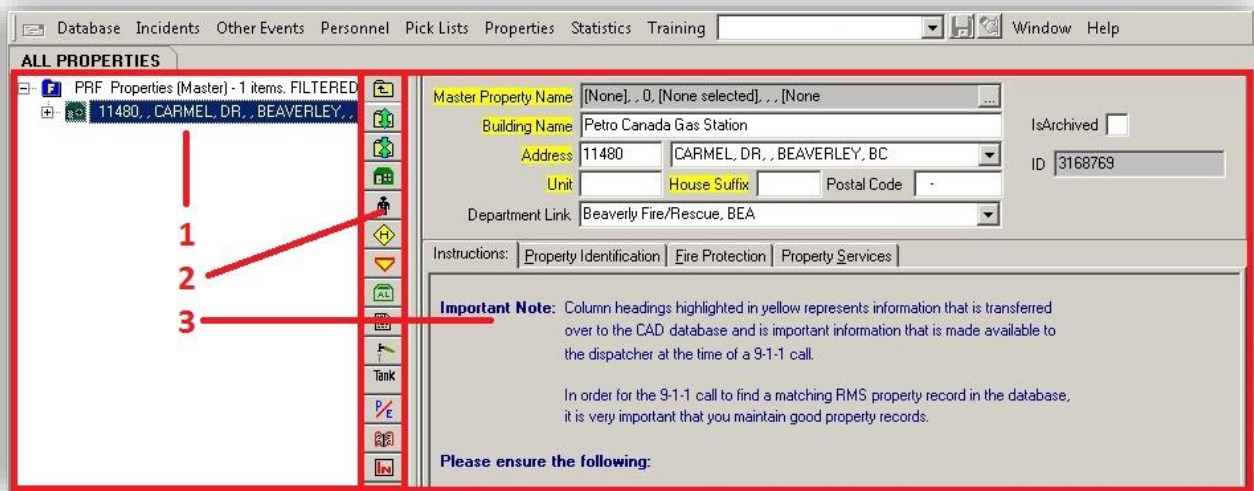
Every module menu contains views. Views do exactly what their name implies: they allow you to view the records in the database. Everything in FDM RMS is done using views.

3.1 Open a View

1. Click on a module menu (e.g. Incidents). A list of views will appear.
2. Click on a view from the menu. A tab will open in the FDM RMS window with the view's name.
3. Repeat to open multiple views at a time.
4. Switch between views by clicking on the tabs.



Views have three sections: (1) a column of records on the left, (2) a [Centre Icon Bar](#) in the middle with buttons and (3) record details on the right. Clicking a record in the column will display the details of that record.



3.2 Refresh a View

If you have added or deleted records, you may need to refresh the view to see your changes:

1. Click on the tab of the view you want to refresh.
2. Right-click and select Refresh.

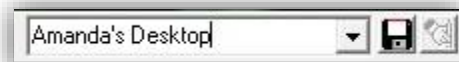
3.3 Close a View


1. Click on the tab of the view you want to close.
2. Right-click and select Close.

3.4 Save Your Desktop


If there are certain views you use all the time, you can save them under a personal desktop. When you log into RMS you can open your saved desktop to open all your views at once.

1. [Open all the views](#) you want to include in your saved desktop.
2. At the top of your screen in the menu bar there is a white dropdown box. Click in that box and type a name for your desktop.




5. Click the  button to save your settings.
6. Next time you log in, click the drop-down arrow and select your desktop.

To modify an existing desktop:

1. Open your desktop.
2. Open views you want to add and close views you want to remove.
3. Click the  button to save your changes.

To delete an existing desktop:

1. Open your desktop.
2. Click the  button to delete the selected desktop.

3.5 Views and Queries

Records in views can be queried using search criteria. This results in a filtered list of records. If a query exists on a view, you will be prompted to enter search criteria before the view can run:

1. Open a view that has a query (e.g. Incidents By Date).



2. Fill out the search criteria:
 - **Drop-down lists:** Choose an option from the list.
 - **Dates:** Choose a date from the pop-up calendar or manually type in the date/time.
 - **Text fields:** Text must be entered exactly as it appears in the record. To search for part of a word, use the following: %text%



By including a % sign at the beginning and end of your search text, you are telling FDM RMS to look for anything that contains your text, regardless of whether or not there is other text tacked on to the beginning or end of it.

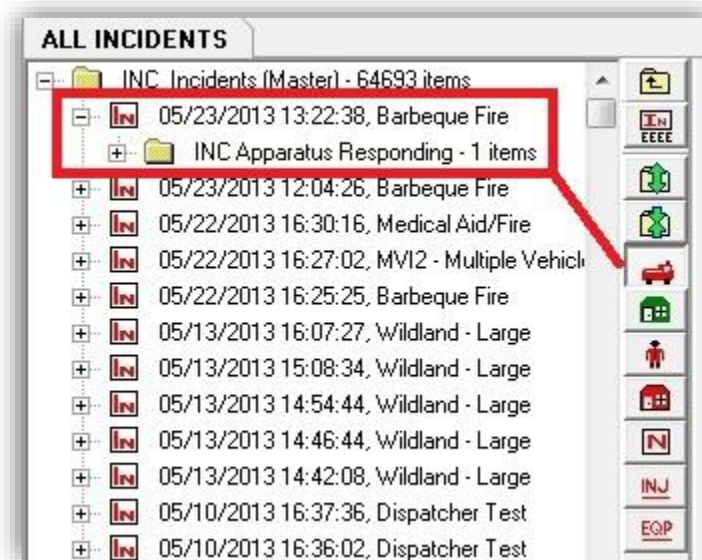
- **Check boxes:** Check or uncheck as desired. Checked = yes, unchecked = no.

3. Click Apply. The resulting records will be filtered according to your criteria.

3.6 Center Icon Bar

The center icon bar is located between the records column and the details section. It is a vertical line of buttons and each button represents a table that contains information related to the record you currently have selected.

1. Select a record from the records column.
2. Hover your mouse over a button in the Centre Icon Bar to see the table name.
3. Click on the button in the Centre Icon Bar.
 - A subfolder will open beneath your selected record. If it is empty, there is no related information. If there are records, select them to view them. You can also [add new records](#) here.
 - To hide the contents of a subfolder, click the  button. To expand the contents of a subfolder, hit the  button.



4. To close the subfolder, click the Centre Icon Bar button again.

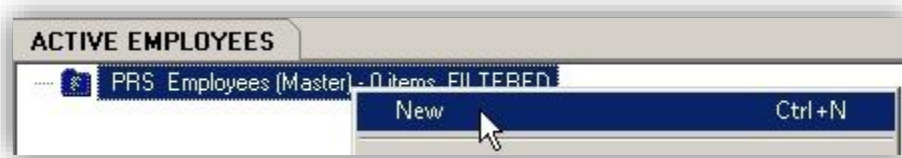
4 Managing Records

You can add, remove and modify records in FDM RMS.

4.1 Add a New Record

4.1.1 Add a Record Using the Records Column

1. Click on a module menu and [open a view](#).
2. Click on the folder located at the top of the records column.
3. Right-click and select New.

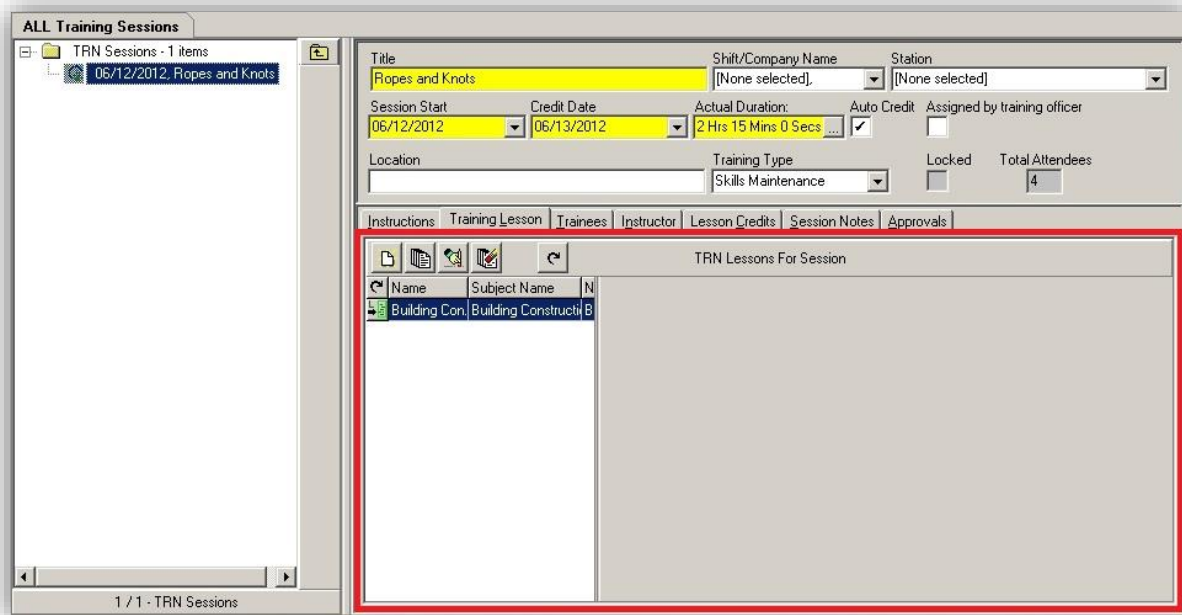



4. Fill in the fields. **Red** and **yellow** fields are required. White fields are optional.
5. Click Ok. Your record has been created.
6. Additional fields will become available once the record has been created. Fill in the ones you require for your record-keeping.

4.1.2 Add a Record Through the Record Details Section

When viewing the details of a record, you can add records to sub-tables. Some sub-table may also be accessed through the [Centre Icon Bar](#).

1. Click on a module menu and [open a view](#).
2. Select a record and locate a sub-table:



3. Click the New  button.
4. Fill in the fields. **Red** and **yellow** fields are required. White fields are optional.
5. Click Ok. Your record has been created.
6. Additional fields will become available once the record has been created. Fill in the ones you require for your record-keeping.


4.1.3 Add Multiple Records

You can insert multiple records at a time, either through the Centre Icon Bar or sub-tables in the record details section.

Using the Centre Icon Bar:

1. Click a button in the [Centre Icon Bar](#) to open a subfolder.
2. Click on the subfolder to select it.
3. Right-click the subfolder and select New (Multiple Selection).
4. Click Transfer Criteria. You should see a list of items with checkboxes.
5. Check off all items you wish to add as new records. Click Next.
6. If any additional information is required, fill in those fields. Whatever you enter will be applied to all the items in your selection.
7. Click Done. All your records have been added.

Through the Record Details Section:



1. Select a record and locate a [sub-table](#).
2. Click the New (Multiple Selection)  button.
3. Click Transfer Criteria. You should see a list of items with checkboxes.
4. Check off all items you wish to add as new records. Click Next.
5. If any additional information is required, fill in those fields. Whatever you enter will be applied to all the items in your selection.
6. Click Done. All your records have been added.

4.2 Delete a Record

1. Click on a record.
2. Right-click and choose Delete.

3. Click Ok to confirm the deletion.


OR

1. Select a record within a sub-table.
 - a. Click the Delete  button to delete a single record.
 - b. Click the Delete All  button to delete all the records.
2. Click Ok to confirm the deletion

NOTE: Deleting records is permanent so proceed with caution. Some records cannot be deleted because they have been linked to other records in the database.

4.3 Edit a Record

The details section of a record is composed of different fields. Use the Tab key on your keyboard to jump from field to field.

- **Tabs:** Used to organize the contents of a view. Click on a tab name to bring it forward.
 - **Read-Only Fields:** **Grey** fields are read-only. Some read-only fields are automatically populated.
 - **Text Fields:** Enter freeform text.
 - **Date/Time Fields:**
 1. Click the down arrow. A calendar will open.
 - a. Choose a year by clicking the arrows beside the year.
 - b. Choose a month by clicking the arrows beside the month.
 - c. Click on a day in the calendar to choose the day.
- OR**
2. Type in the date as yyyy-MM-dd HH:mm:ss
- OR**
3. Type "T" to select the current date/time
- **Pick Lists:** Click the down arrow and choose an item. See [Pick Lists](#).
 - **Note Fields:** Enter larger blocks of freeform text.
 - **Checkboxes:** Check the box for "Yes". Uncheck the box for "No"
 - **Elapsed Time Fields:** Hit the  button to open the elapsed time box. Enter the hours, minutes and seconds and hit Ok.

4.4 Locking Records

Lock a record to make it read-only. In some cases, locking a record can also trigger other events to happen, such as automatic calculations. You can edit a locked record by unlocking it, making your changes, and locking it again. You will require the appropriate security rights to lock and unlock records.

NOTE: Before a record can be locked, all red and yellow fields must be filled in.

4.4.1 Lock a Record



1. Select an unlocked record.
2. Right-click and select Lock.
3. Click Yes to confirm the lock.
4. If any required fields are incomplete, you will receive an error message listing the fields that need to be completed. Enter those fields and try locking the record again.
5. If successful, all fields will turn grey and become read-only. The Locked checkbox will be checked.

4.4.2 Unlock a Record in the Record Column

1. Select a locked record. All the fields for a locked record will appear grey and be read-only. The Locked checkbox will be checked.
2. Right-click and select Unlock.
3. The main record will become editable.

NOTE: Sub-table records must be unlocked individually.

4.4.3 Unlock a Sub-table Record

1. Select a locked record and locate a [sub-table](#).
2. Click the Unlock  button. The record will become editable.
3. Lock it again by clicking the Lock  button or [locking the main record](#).

5 Approving Records

Some modules have an Approvals tab where the person filling out the record can sign off on it as being complete. There will be a Recording Officer field and a date field.

Vehicle Details | Extinguishment | Hazmat Details | Medical Details | Responders | Investigations | Remarks Internal | CAD Info | Approvals

Recording Officer [Red background] [Red background]

Billable Billable Type [Dropdown]

Modifier [Unknown] Modified At [05/08/2013 15:53:50]

1. Find your name in the Recording Officer drop-down list.
2. Enter your FDM RMS password when prompted and click Ok.

Spendiff Amanda

Please enter your current password

[Text Input Field]

[Ok] [Cancel]

3. Enter the date field beside the Recording Officer field.
4. [Lock](#) the record.

NOTE: Once you have entered your password and clicked Ok, the name in the Recording Officer field cannot be changed.

6 Pick Lists

Pick lists are drop-down menus. You will be able to [customize certain pick lists](#) for your department's needs. Others are managed by your FDM administrator. There are 3 different types of pick lists.

6.1 Standard Pick Lists

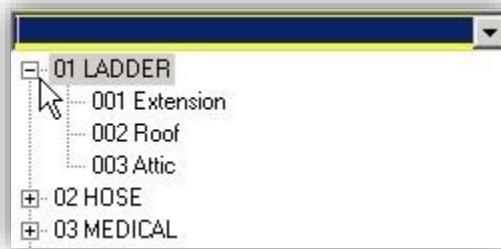
Standard pick lists will appear as a simple list of items.



1. Click the arrow to open the drop-down list.
2. Click on an item.

6.2 Expandable Pick Lists

Expandable pick lists contain groups of items. Each group appears with a \pm beside it.



1. Click the arrow to open the drop-down list.
2. Click on the \pm beside a group name. The group will expand to show the items within it. To hide the items in a group, click the \square button.
3. Double click an item within the group.

6.3 Table Pick Lists

Table pick lists appear as a table with columns.

Prefix Direction	Street Name	Street Type	Suffix Direction	City Link Name	City Link
	[None selected]			[None selected]	
	100	FSR		BEAR LAKE	BC
	100 C	FSR		MELDRUM / MACKIN CREEK	BC
	103 MILE	RD	W	103 MILE HOUSE	BC
	103 MILE LAKE	RD		103 MILE HOUSE	BC
	103 MILE LAKE ACCESS NO 1	RD		103 MILE HOUSE	BC
	103 MILE LAKE ACCESS NO 2	RD		103 MILE HOUSE	BC

1. Click the arrow to open the drop-down list.
2. Click on a column name to sort the data in that column alphabetically.

3. Scroll down or start typing to jump to an item.
4. Click on the item.

6.4 Add a Value to a Pick List


You have the ability to customize certain pick lists as long as you have been granted the security rights to do so. Items in pick lists are stored in tables, so to add an item to a pick list you need to add the item to the corresponding table. The pick lists you can edit are listed under the Pick Lists menu. Some pick lists are shared between all the departments that use FDM RMS and are maintained by your FDM administrators – please contact them if you can't add the item yourself.

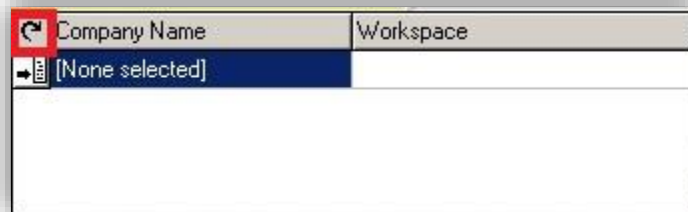
To add or delete a pick list item:

1. Click on the Pick Lists menu.
2. Click on a view. Each view contains the list of items currently available in the pick list.
3. [Add](#) or [delete](#) a record.

NOTE: You may not be able to delete items from a pick list if they have been referenced in other records. Contact your FDM administrator for assistance.

Your changes may not actually appear in the pick list itself until you refresh it:

1. Select a record in a view and locate the pick list field.
2. Click the arrow to open the drop-down list.
3. If your changes do not appear, hit the curly arrow  to refresh the list.



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