

CHAPTER 5T

PROPERTIES TUTORIAL

- 5.T.10 Property Records
- 5.T.20 Setting up the Properties Module
- 5.T.30 Imported Property Records
 - 5.T.30.10 Checking for Duplicate Records
 - 5.T.30.20 Repairing Duplicated Properties
- 5.T.40 Entering Records Manually
- 5.T.50 Property Record Addresses
- 5.T.60 Property Contact Information
- 5.T.70 Non-Property Records
 - 5.T.70.10 Untitled Non-Property Records
 - 5.T.70.20 Titled Non-Property Records
- 5.T.80 Finding Property Records
- 5.T.90 Selecting Properties
- 5.T.100 Sort/Display List
- 5.T.110 Hazmat Records
- 5.T.120 Pre-Plans
- 5.T.130 Invoices
- 5.T.140 By-Laws
- 5.T.150 Incidents
- 5.T.160 Permits
- 5.T.170 Public Education
- 5.T.180 Hydrants
- 5.T.190 Building Permits
- 5.T.200 Additional Buttons
 - 5.T.200.10 Chronology
 - 5.T.200.20 Letters
- 5.T.210 The Action Menu
- 5.T.220 Property Reports

Property Records

Property Records are a core feature of FirePro as they provide a central record that you can link other information to, including incidents at the location, hazardous materials on-site, inspections performed, permits issued, by-law infractions, and even photos.

Since so much information is attached to property records, it is very important that they are well-organized, clear and easy to locate. Depending on how you decide to set-up FirePro, you will either have your property data imported for you, or you will enter your property information yourself. Either way, doing some careful organization will make the Property Module much easier to use.

This tutorial will walk you through the process of setting up the Properties module, either importing or entering properties, fixing or removing duplicate records, using primary and secondary properties, geo codes and property types, as well as searching for properties and reviewing the information that you can attach to property records.

More detailed information on each step of the process is available in the appropriate sections of the FirePro Manual.

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

Setting up the Properties Module

When you start working with property records, either before adding your own records or before you start using imported property records, you need to make some decisions about how the Properties Module is set-up.

You can customize the Properties Module through the Custom Settings menu, which is accessible through the Set-up→Custom Settings→Properties Tab.

To learn more about custom settings for the Properties module, go to:



20.C.10

When you are working with the Custom Settings, you should consider the following things:

You can set the Occupancy field on the property records as optional, or required. Bear in mind that occupancy information flows automatically from the Property record to any Incident report created for that address, and that it is information that is required for Incident or Fire reporting in most provinces. The advantage to having optional occupancy is that you may not have this information for all

properties, so you would be able to leave it blank.

FirePro can use a drop-down list to select street names in the Civic address area, and to locate streets in the find screen.

To learn more about the Street List, go to:

5.C - STREET NAME

If you are entering your property records manually, it's probably easiest to turn the Street List off initially, and then turn it on when you are done and allow FirePro to generate the Street List for you - otherwise you will need to create a Street List first - either manually or through an import, and then select the street name when you are entering your property records.

To edit the Street List, go to:



20.70.10

Note:

Contact Ingenious Software at fp2tech@ingenioussoftware.com to get instructions on importing your street list.

You may find that the fields available in the default property record form do not accurately reflect the way that you record property information. You can change the titles of a number of fields, or display custom fields by going to the Set-up→Custom Settings→Properties Tab→Custom Fields Tab.

To learn more about the Custom Fields Tab, go to:



20.C.10.20

5.T.30

Imported Property Records

If you elected to have FirePro import property records for you, you will start with a populated set of property records. The overall quality of these records will depend on the initial data that you provided, so your first step should be to review how the records have imported, see which data is recorded on which fields, and check for duplicate records.

It's important to know this information because it may determine how you use FirePro for some tasks. Trying to find a property by an owner's last name may be difficult if, for example, the owner name information appears in the business name line, as is common in data imports.

Checking For Duplicate Records.

When you start to work with your imported data, ensuring that you do not have duplicated records is very important. FirePro uses property records as a base to which additional records, such as Incident reports, are attached, so having duplicate records can cause you problems locating information, or generating accurate reports or statistics.

First, you should run a duplicate property check by going to the Reports→Management Report Menu→Properties→Check for Duplicate Properties option.

To find out more about the Duplicate Properties report, go to:



[5.R.80](#)

or



[FirePro Tip O' the Week #91 - FIXING DUPLICATED STREET OR TOWN NAMES](#)

If you get a limited number of results on this check, but are still experiencing duplicate properties, you can change the search parameters.

To find out more about changing the duplicate search parameters, go to:



[20.C.10.10](#)

Repairing Duplicate Properties

If the Duplicate Properties report brings up potential duplicate properties, you have several options as to how to repair them.

If either property has no records of any kind attached to it, you can delete the duplicate property. This will completely remove that record from FirePro, and the record cannot be recovered, so delete with caution.

To find out more about deleting properties, go to:

[5.E.50](#)

If both properties have records attached to them, you can merge the property records into one without losing any attached records by using the Merge command.

To learn more about merging properties, go to:

[5.E.60](#)

Some properties may have the same physical address but require different property records. Strip malls and apartment buildings, for example. In this case, you can

use the Primary and Secondary property types to reflect the units of a larger building.

To learn more about Primary and Secondary property types, go to:

5.C

or



FirePro Tip O' the Week #10 - *PROPERTY TYPES*

5.T.40

Entering Records Manually

If you do not have property records in a format that can be used for an import, or you have a fairly small number of property records, you can elect to enter your property records yourself.

You will need to have several lists complete before you start entering records. First, check your Station List by going to the Set-up→Station Names menu and ensure that all your Stations are entered correctly. FirePro typically ships with this information filled out for you, but it's worthwhile to check.

To learn more about Station Names, go to:



40

FirePro also ships with the Complex and Occupancy lists filled out, as these lists are mandated by your Provincial Fire Authority.

The Town/Township list also comes pre-populated, but should be checked to ensure that it appears the way that you prefer.

To learn more about Town/Township Lists, go to:



20.70.40

You may also want to set up Geo Areas before you start entering properties. You can set up the Geo Area later, if you decide you need them, but it can save time to enter them at the same time as the rest of your property record.

Geo areas allow you to group properties together in a manner similar to Town/Townships, but separate from them, so properties from different towns can go in the same Geo area, or one town can be divided into many geo areas. The main advantage to doing this is the ability to generate reports from Firepro that give you information about all properties in a given Geo area.

To learn more about setting up Geo areas, go to:



20.60.20

Property Record Addresses

The most important information in any property record is the Civic Address. FirePro searches and lists properties primarily by address, so ensuring that this information is accurate is critical. Street Address and Street name are required fields, as is Occupancy (by default). We recommend that you add as much information as possible to property records, as the more detailed you are, the easier it is for you to distinguish between similar properties, and to avoid possible duplication.

You can also use the Rural/Legal description fields to enter that information. This provides a secondary way of searching for properties, and can be especially useful if there is a lack of consistency in property addresses within your Fire Protection Area.

There are a number of fields in property records that can be used to provide this additional detail, including:

CROSS STREET:

This field can be used to record the closest cross street to a property, which can be used when searching (find properties near First and Tenth, for example).

ROLL#:

You can use roll number to search for properties, and this number can be entered manually or imported while you import the reset of your property information.

KEY BOX:

The key box field is usually used to record key or access information for properties, but can be renamed and used for any kind of text record.

AKA:

The AKA field is searchable, and is usually used for the common name of a business or building.

To learn more about these data fields, go to:
5.C Property Window Fields

Property Contact Information

In FP2 there are six tabs available for sorting and storing your contact information for a particular property.

1. Occupant
2. Owner
3. Contact
4. Alternate Tab (visible only if named)
5. Custom Tab (visible only if named)
6. Custom Tab (visible only if named)

All of these tabs can be named or renamed from the Custom Settings option in the Setup Menu.

To learn more about changing and customizing the contact information tabs, go to:



20.C.10.20

The first tab is usually "Occupant", and is used to record information about the person/business that occupies the property.

Note:

Always enter "first name" beside where it says "Name:" and then enter the "last name" in the box beside it.

The searchable fields are Last Name, and Business, as signified by boxed outline of these fields.

The next tab is usually the Owner Tab, and is used to record information about the person or company that owns the actual property.

Note:

It is not unusual that information contained in one of these sections would apply to another, (e.g. the owner is also the occupant, or the occupant is also the contact). To copy information from the Occupant section and paste it in the Owner or Contact tabs, Click on Occupant → Owner or Occupant → Contact.

The third tab is often the Contacts Tab, and is used for any other contact person/information that relates to the property. There are no searchable fields here.

The Alternate tab and the two optional tabs have the same layout and contain the same type of information as Contacts tab.

Non-Property Records

Non-Property records are primarily used as place holders of incident reports that happen in a location other than at a specific property, such as a MVA at a particular intersection.

Non-Property Records are identified by a red "N-P" in the upper right hand corner of the property window.

There are two different ways in which Non-Property records can be organized in FirePro; Untitled and Titled. You can select which type you want to use in the Custom Settings Menu.

To learn more about using Untitled and Titled Non-Property Records, go to:



[20.C.10.20](#)

or



[FirePro Tip O' the Week #79 - NON-PROPERTY RECORDS](#)

5.T.70.10

Untitled Non-Property Records

Untitled Non-Property records are the alternative non-property setting for FirePro, and are created when you create a "New Non-Property Incident". They do not contain any information except a short description pulled from the incident report, and serve only as placeholders to attach the Incident information.

To learn more about Non-Property Incidents, go to:

[6.G.5 - Non-property Incident Window](#)

5.T.70.20

Titled Non-Property Records

Titled Non-Property records can be used to group similar non-property incidents together for reporting and lookup purposes. For example, you can attach all the non-property incidents that occur at a highway intersection to a non-property record and generate statistics about the incidents that occur at that location.

To learn more about Titled Non-Property Records, go to:

[5.G.5 The Properties Window - Non-properties Format.](#)

You can either create the titles of your non-property records while you are entering your non-property incidents, or you can generate a list ahead of time. You can create titles by going to the Action→Add Non-property record option.

To learn more about setting up titled non-property records, go to:
[5.G.5](#)

[5.T.80](#)

Finding Property Records

Since property records are a core component to FirePro, it's important to be able to locate them easily. We have already discussed why knowing how your records are entered is helpful for searching, so now let's look at a bit more of why that is.

To learn more about finding properties, go to:
[5.G.10 Search Window](#)

Searching databases, especially large ones, can be difficult, but there are several principles that make it easier, and can be used if you're having difficulty finding the records you're looking for.

Broad Searches

Many people's initial reaction to a database search field is to enter every piece of information they have, and then are confused as to why they don't find the record they're searching for.

It's a good practice when searching a database to initially only use the basic information, like street number and street name. This will give you a longer list of results, but the one you're looking for is more likely to be on the list. If the list is too long to be manageable, add a bit more information to reduce the size.

Data Entry Formats

Being aware of how data is entered into the fields of each record is very important. If all your contact names are entered into the Business names field in the first name, last name order, then using a "Starts With" search with a person's last name isn't going to be very helpful. Always try to ensure that you're searching for the right information in the right place. Remember, "Contains" searches take longer to execute, but sometimes it's the only way to find what you're looking for.

Alternative Information

If your search isn't bringing up any results, it might be time to try something different. See if you have any other searchable information on the property and try using that. You may end up with another list of possible matches that will tell you what you're looking for when you cross-check it with your previous search.

To learn more about finding properties, go to:



FirePro Tip O' the Week #77 - FINDING AN ADDRESS

Selecting Properties

FirePro has the ability to save groups of properties onto Selected lists. You are able to set up your own set of Selected list titles.

To learn more about setting up Selected list titles, go to:



20.60.20

This can be useful when you are splitting up properties between Inspectors, or specifically tracking a number of properties.

To learn more about Selected Lists, go to:

5.G.10.D.90

Sort/Display List

The Sort/Display List allows you to change the way that your property record information is displayed in the List/Find Window.

You can change the fields which are displayed, the way in which they are sorted and what additional information is shown. Multiple different Sort/Display styles can be saved and switched between while you are looking at this list.

First, you'll need to set up the style names, which can be done by going to Maintenance → Edit Pop Up Lists → Property → Sort/Display Style Names.

To learn more about setting Sort/Display style names, go to:



20.60.60

Once you have set up the Style Names, you can set which fields will be displayed by each style, and in what order. To do this, go to Maintenance → Edit Pop Up Lists → Property → Sort/Display Style Definitions.

To learn more about setting the Sort/Display style definitions, go to:



20.60.70

Each list should have a specific purpose, like showing the names of home owners, or the contact names and numbers at businesses, and each list should contain at least the basic physical address of the property, for ease of identification.

Once you have set up your lists, you can choose default display lists for different functions by going to Maintenance → Edit Pop Up Lists → Property → Choose Default Display Style.

Choosing default display styles will set which of your Sort/Display styles will be used with each different search type - so after you search by occupant name, the results list will show the occupant name fields, for example.

To learn more about setting default display styles, go to:



20.60.80

5.T.110

Hazmat Records

Hazmat records can be attached to properties to indicate the presence of hazardous materials stored at a location. Basic hazmat records provide a record of the hazardous material and the location where it is stored.

FirePro provides a visual alert of hazardous materials by changing the default Hazmat button on the property record to red when hazmat records are present - allowing you to quickly identify the presence of hazardous materials.

To find out more about Hazmat Records, go to:

5.G.95

FirePro also provides an optional Hazmat Database, which is based off the Canutec Hazard Guide. If you use the database, you can search for hazardous materials by name, PIN number or guide number and quickly print off a Hazard Guide for each type of material present at a property.

To find out more about the Hazmat Database, go to:

5.G.90

Note:

If you are interested in purchasing the Hazmat Database, please contact Ingenious Software at 866-352-9495.

Pre-Plans

Pre-Plans (or Emergency Plans), can be attached to property records in one of two different formats; NFPA-style pre-plans or customized pre-plans. For either type of pre-plan, you can set up special alerts that display as a red button if you select them.

Customized Pre-Plans

FirePro enables you to set up customized pre-plans that reflect the information on your department's existing pre-plans. You can define up to 18 different pre-plan categories, and customize the contents of each category.

**To find out more about customized pre-plans, go to:
5.G.110**

NFPA Pre-Plans

The NFPA Pre-plan format matches the standard NFPA pre-plan fields, and prints an NFPA-style report. You are able to customize building construction types and special alerts. This is generally a very detailed pre-plan format.

**To find out more about NFPA Pre-plans, go to:
5.G.120**

Invoices

The optional Invoice module is used to quickly create, print and record invoices or bills issued to a property. You can create a customized list of invoice items and FirePro will assist you in tracking the status of the invoice, calculate GST and PST and store each record.

**To find out more about using the Invoice module with properties, go to:
Chapter 11: Invoices**

By-Laws

The optional By-Laws module is used to track by-law infractions and fines at a property. You can create different types of infractions, monitor their status, and even run a report that informs you of unpaid fines.

**To learn more about the By-Laws module, go to:
Chapter 32: By-Laws.**

Incidents

Incident Reporting is a key feature of FirePro, and is covered in detail in Chapter 6. The important thing to remember here is that all property-related incident records are created through the property record for that address.

Non-Property Incidents are incident records that are not attached to a specific property; motor vehicle accidents or wildlands fires, for example. They are created through the FirePro 2→Create Non-Property Incident option, and can be attached to Titled Non-property records. If you are not using titled non-property records, FirePro 2 will create a placeholder non-property record that the incident is attached to.

To learn more about Incident Reporting, go to:

Chapter 6: Incidents

Or

6.T - Incident Tutorial

Permits

The basic version of FirePro includes a Burn Permits module which can be customized to match your department's fire permits. There is also an optional Custom Permits module which can be used to create permit templates for a wide variety of different permits. In either case, FirePro's Permit module allows you to quickly create and print, and conveniently record permit information.

To learn more about Burn Permits, go to:

10.B

To learn more about Custom Permits, go to:

10.G.10

Public Education

The Public Education Module of FirePro allows you to record information about Public Education events that you have conducted at a property.

You can customize the information that you record about each session, which can include the type of presentation, the audience composition and age groups, the subjects, handouts and Firefighters present.

To learn more about customizing your Pub-Ed module, go to:



20.80

To learn more about the Pub-Ed module, go to:
Chapter 12: Public Education

[5.T.180](#)

Hydrant Records

The optional Hydrant Module is used to record location, flow test results, maintenance records and operational status for your hydrants. You are able to attach up to 2 hydrant records to each property record, and the Hydrant buttons are color-coded to visually indicate out-of service hydrants (red button text).

To learn more about the Hydrant module, go to:
Chapter 14: Hydrants

[5.T.190](#)

Building Permits

The optional Building Permits module is used to track building permit applications, inspections and site visits, allowing you to customize your permit types, track the status of the building and generate reports about inspection schedules.

To learn more about the Building Permits module, go to:
Chapter 30: Building Permits

[5.T.200](#)

Additional Buttons

There are several additional buttons attached to the Property Records. These buttons are used throughout FirePro to attach additional information to records.

You can find out more about these buttons in:
Chapter 3 - Recurrent System Components

[5.T.200.10](#)

Chronology

The chronology window is used to record additional date-related notes about a property. Information like road closures, construction dates or any other comments can be added, and are displayed in reverse chronological order (most recent dates first).

To learn more about the Chronology window, go to:
5.D.55

Letters

The letters window allows you to create letters, either by typing them manually, cutting and pasting them from another word processing program or by creating letter templates that automatically pull information from the property record they are attached to.

To learn more about the Letters window, go to:
3.110

5.T.210

The Action Menu

There are a number of options in the Action menu that duplicate buttons on the Property record. The Action menu also shows the hotkeys for each of these commands. There are also several options that are only available through the action menu.

Action→Add Non-Property Record

This option allows you to create a new non-property record. It is especially useful if you are using titled non-property records, as you can view your existing list of record titles, and add new ones, if necessary. This option is only available if titled non-property records are being used.

Action→Find Non-Property Record

This option brings up a list of titled non-property records. You can double-click on a record to bring up the details.

Action→Merge Property

This option is very useful when you want to remove duplicate properties without losing any records attached to it. You can merge one property into another, combining all attached records onto one property record.

Action→Change to a (Non)Property Record

This option will display differently, depending if you are looking at a Property or Non-Property record. In either case, using this option will change the property record you are viewing to the other property type.

Action→Change Street Name List

Use this option to quickly add or remove street names from your list - remember, hitting the Re-Create List button will generate a new list using the existing street names from your properties' records, so if there are any streets on your Street List that aren't currently used on a property record, they will be removed from the list.

Action→Clear Pre-Plans

Use this option to remove all Pre-Plan information from this property record. This is useful if you are changing the type of Pre-plan (from custom to NFPA or vice-versa).

Action→Clear All Hazmats

Use this option to remove all Hazmat records from this property.

To learn more about the properties action menu, go to:
5.E

5.T.220

Property Reports

A number of different reports about Properties are available. You should review the available reports, and explore the different parameters available for each. Remember that report templates allow you to save specific parameters, making recreating specific reports much faster.

To learn more about the available Property Reports, go to:



5.R - Reports