

CHAPTER 17T

MEETINGS & TRAINING TUTORIAL

- 17.T.10 Meetings & Training Records
- 17.T.20 Setting Up Meetings & Training
 - 17.T.20.10 Custom Checkboxes & Lists
- 17.T.30 Selecting Course Titles
- 17.T.40 Creating your Lists
- 17.T.50 Instructor Lists
- 17.T.60 Subjects
- 17.T.70 Creating a Session
- 17.T.80 Adding a Subject
- 17.T.90 Adding Attendees
- 17.T.100 Printing Course Outlines
- 17.T.110 Recording Additional Information
- 17.T.120 Sign-Offs
- 17.T.130 Tracking Certification
- 17.T.140 Recording SCBA & Driving
- 17.T.150 Using Electronic IDs
- 17.T.160 The Action Menu
- 17.T.170 Meeting & Training Reports

17.T.10

Meetings & Training Records

The Meetings & Training Module in FirePro is used to record information on meetings, training sessions, work parties or any other group activity. You can track the length and subject of the activity, attendees, and even what activities each individual worked on. The module can also be linked directly to your payroll module, to make paying staff and volunteers easy.

The Meetings and Training module can be used to track which courses a firefighter has attended or signed-off on. It can generate reports that tell you what percentage of meetings each staff member has attended, and it can even create course outlines, complete with sign-in sheets for attendees.

This tutorial will review how to; set up the module so that it works for your department, create or import subject lists, and create sessions and add attendees, as well as some advanced possibilities, like tracking sign-offs or multiple-subject classes.

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*.

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Setting Up Meetings & Training

Meetings & Training, like most FirePro modules, is customizable, so it's very helpful to spend some time adjusting the module so that it works for you. There are also a number of lists that need to be set up before you begin entering sessions.

First, you need to have your personnel entered in the Fire Fighters Module. The Meetings & Training module uses your personnel roster, which is created in the Fire Fighters module. If you are using a Payroll module, make sure that you don't change any settings on the Meetings & Training module that would affect it - turning off the points field when your payroll is points-based, for example.

To learn about entering personnel records, go to: *Chapter 16: Fire Fighters*

Once you decide what setting you want to adjust, go to the Set-up Menu→Custom Settings→Meetings & Training Tab.

To learn more about Meetings & Training Custom Settings, go to:



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There are a number of options in the Meetings & Training Custom Settings that can be adjusted to customize the module. These fields are described in detail in the Set-up Chapter, but there are several options which should be explained further.

SHOW "NOT CONFIRMED"

You can enter future Meeting & Training sessions, which will allow you to use FirePro to print training calendars. Using the "Not Confirmed" flag will allow you to note sessions which may not occur.

USE THEORY & PRACTICAL

When you turn on this option, you will not be able to edit the course length field directly - it will be generated automatically from the sum of the two new enterable Theory and Practical fields.

SORT SUBJECTS BY MODULES & COMPONENTS

Turning on this option will require your subjects to be categorized by Modules and Components, NFPA-style. FirePro currently has an NFPA-format training course list available for Ontario departments.

IDENTIFY ATTENDEE AS INSTRUCTOR

Using this option, you can flag a course attendee as the instructor. The benefit to using this flag is that an instructor's attendance report will then show that they attended and taught these sessions.

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Custom Checkboxes and Lists

FirePro has a variety of custom checkboxes and lists that are available to customize the Meetings & Training module. Like other custom fields, they only appear if you enter a title for them. If there is additional information that you want to record for your sessions, and the default settings don't contain a place for it, try using one of the custom fields instead. You have the option of a field that records numbers, checkboxes (for yes-no options), lists that you can create yourself, or multiple lines of text.

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Selecting Session Types

FirePro supports up to 3 different types of courses. The defaults are Meeting, Training and Work Party, but they can be adjusted to reflect your Department's terminology.

To learn more about changing session types, go to:



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Creating your Lists

At this point, you need to ensure that your Instructor, Officer (if necessary), Subject and Firefighter lists are complete. The Officer and Firefighter lists are created when you enter your personnel in the Fire Fighters module. The Instructor list and Subject list are both created through the Maintenance→Edit Pop-ups→Training Lists.

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Instructor List

The Instructor List can be used in several different ways. If you turn off the Use Instructor List option in Custom Settings window, the Instructor Name field will be a blank box that you can type in. If you use the Instructor List, you'll have to populate it. You can add your Firefighters to the Instructor List, and input names from outside the department.

To learn more about the Instructor List, go to:



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Subjects

Creating your subject list can be a lengthy process, as there is potentially a great deal of information that you can include in each subject. If you are using an NFPA-style subject list that is broken up into Components and Modules, you will need to create them first. You will also need to ensure that the Sort Subjects by Modules and Components flag is turned on in the Custom Settings window.

Note:

Subjects can be used for more than just training sessions. If you have several different kinds of meetings, create subjects for each and use the subject to record what type of meeting was held at a given session.

To learn more about creating Components and Modules, go to:



20.20.10 and



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If you are not organizing your Subjects by modules and components, you only need to create the subject records.

When creating Subjects, there are several fields that should be explained further:

Chapter 17T - Meetings and Training Tutorial - Update January 25th, 2008

SUBJECT

The subject field is the title of the subject, and will appear after the subject code when adding subjects to a session.

SUBJECT CODE

The subject code is a short-form identifier for the subject. It appears before the subject in several windows in the Training Module, so you should select something that is unique and fairly easy to identify.

DESCRIPTION

The Description field can contain a large amount of text, and can be printed out as part of a session report. If you have detailed course outlines, you can enter them in this field, which allows you to quickly print out a course package which includes the outline. The description field is also displayed in the Desc. & Narrative window, which is used to describe what was actually done at a course, so you can add information about required activities here so that you can refer to them later.

HOURS FOR:

The Hours for Certification and Re-Certification fields can be filled in if you want FirePro to track progress to Certification or Re-Certification for Firefighters.

To learn more about tracking certification and re-certification, go to:

17.T.130

or



FirePro Tip O' the Week #63 - TRACKING COURSES FOR CERTIFICATION

Comment [DMF1]: Or
17.T.130

TRAINING RESOURCES

Enter the materials needed for the training session in this field. This information can also be printed on the session report, giving you all the information you need to put on a training session.

To learn more about creating Subjects, go to:



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[17.T.70](#)

Creating a Session

At this point, you have customized the module, created your Instructor and Subject lists and ensured that your firefighter roster is complete; you're ready to begin creating a session.

There are several stages to creating a complete meeting or training course record. The first is entering the general information about the time, date and subject of the course - the session information.

Start creating the session using the "Add" button. FirePro will enter the current date by default, and can also enter additional defaults, start time and session type, depending if they were selected in the Custom Settings window.

Note:

FirePro recommends using the "Tab" key to move between fields while entering records. It's quicker and ensures that you go to all fields that may be necessary.

You'll need to complete all the necessary fields as you go, remembering that some fields may not need to be filled in, depending on the kind of course you are entering, and the way your payroll module works. Make sure you enter a length for the course, select the type of session, and indicate the Instructor and/or Officer.

Comment [DMF2]: Not mandatory

You should also select a station that is putting on the session from the Station List in the upper-left corner of the window. You can still add firefighters from other stations if you want to.

Once you have created the session information, you can press the "OK" button to save. You don't have to add any additional information at this point. You can enter sessions that are scheduled in the future this way, and FirePro can be used to generate training calendars for this type of course.

17.T.80

Adding a Subject

There are several different ways to add subjects to sessions, but before we review them, it's important to understand the interaction between course subjects and subjects taken by individual firefighters.

Each Firefighter who attends a course does not have to take all the course subjects. An attendee will only receive credit for taking a course if they are enrolled in that subject for a particular session. You can even have several different subjects with each attendee working with a different one.

This flexibility is meant to help you accurately represent what is happening at a given training session. It has an impact on how you add your subjects because FirePro has some features which allow you to quickly record which attendee took which subject.

Method 1: Adding the Subject First

This method is fastest and easiest when you are entering a course that has only one subject.

When you have finished entering your session information, you can add the subject as well by clicking the "Add Subject" button, selecting the subject and pressing "OK". You can also use the "Add Subject" button after you have pressed the "OK" button. In either case, you will need to press "OK" before adding your attendees.

The benefit to using this method is that when you have only one subject, all attendees that you enter are automatically considered to be taking that subject.

Method 2: Adding Attendees, then Adding Subjects

This method is quickest to use when you have several subjects being taught at a course that are being taken by all attendees.

After you have entered your session information and pressed OK, add your attendees (see 17.T.90). Once your attendees have been added, click the "Add Subject" button and select your course subject from the list. FirePro will prompt you to see if you would like to "Assign the subject to all attendees". Selecting yes will automatically add the subject to all firefighters in attendance. Repeat the process for each subject.

Method 3: Using the "Subjects Taken+" Button

The "Subjects Taken+" button allows you to select multiple firefighters and add them all to a subject at the same time. This option is most useful when you have a complicated course, with a number of attendees, taking different subjects.

After you have entered your session information, add all your subjects with the "Add Subjects" button. Once you have added your subjects, add all your attendees. When you have multiple subjects, FirePro will not automatically enroll attendees in a subject.

When you have added your subjects and attendees, click the "Add Subjects Taken+" button. You can then select multiple attendees and add them to courses at the same time.

**To learn more about the "Add Subjects Taken+" button, go to:
17.G.20**

Method 4: Individual Attendance Records

This method works best when you have a few attendees that you need to record information for, or when you are adding an additional attendee to a session with several subjects.

To do this, add your subjects and attendees as normal. Once they are added, double-click on the attendees name in the Fire Fighters in attendance section (or click on their name and click the "FF Details" button. The Firefighters Detail window will appear where you can record attendance for the individual.

**To learn more about the FF Details window, go to:
17.G.10**

17.T.90

Adding Attendees

As you have seen from the previous section, the order in which you add attendees and subjects is quite flexible, depending on the type of session you're recording. The process for actually adding the attendees is basically the same in any case.

To add attendees to a session, enter the session information and press OK. You can then add attendees from your Fire Fighters Roster on the left side of the window. There are several different methods you can use to add attendees.

- You can double-click on a name on the roster to add the fire fighter to the Fire Fighters in Attendance List.
- You can left click on a name and click on the "Add to List" button.
- You can left click and drag your mouse cursor to select multiple names, followed by the "Add to List" button.
- You can use the Shift-click and Ctrl-click options to select names and use the Add to list option.

All these methods move fire fighters names to the Fire Fighters in Attendance List in the bottom section of the page.

17.T.100

Printing Course Outlines

Some departments may choose to enter all the information they need to run courses into FirePro, rather than keep separate course materials. This has the benefit of reducing paper clutter and allowing you to create your course outline "on-demand" for each course.

The process starts by entering the course outline in the Description field of each subject you want to print these for. You should also enter the materials required to teach the course in the Course Materials field.

To create the course outline, you will need to set up the session, subjects and attendees list before the course starts and press the "Print" button. You will be prompted whether you want to print the course description. You should select Yes. FirePro will then print a session report which includes course materials, the course outline from the Description field, the attendees and even, if you turn on the "Print Signature Lines.." an option in the Custom Settings→Meetings & Training window, signature lines for attendees to sign in.

17.T.110

Recording Additional Information

There are several places in a Meeting & Training Record that you can record additional information.

The "Desc. & Narrative" Button gives you several text fields that you can use to record information. Generally, the Notes for... field is used to record what the Instructor covered in the course and the Notes on this Training Field can be used for any other information about the course.

To learn more about the "Desc. & Narrative" button, go to:

17.D.40

You can also record notes regarding individual attendees in the Fire Fighter Meeting & Training Notes window, which can be accessed from the FF Details window. This window allows you to type text directly or use stock wording phrases to quickly add generic notes to the record.

To learn more about the Fire Fighter Meeting & Training Notes, go to:

17.G.10

You can also use the "Notes+" button to add notes to multiple Firefighter Details at the same time.

To learn more about the "Notes+" button, go to:

17.D.60

17.T.120

Sign-Offs

Sign-Offs are different from attending a course or taking a subject in that FirePro 2 uses the sign-off system to record when a fire fighter has "completed" a subject. Sign-offs are recorded separately from course registrations, and you can either record sign-offs for individuals in the FF Details window, or you can use the "Sign Off+" Button to record sign-offs for multiple attendees at once.

To learn more about the "Sign-off+" Button, go to:

17.D.70

17.T.130

Tracking Certification

It is possible for FirePro to track a new or re-certifying fire fighter's progress towards certification. You will then be able to generate reports from FirePro that monitor an individuals progress towards the total number of hours that they require for certification.

To learn more about tracking certification, go to:



FirePro Tip O' the Week #63 - TRACKING COURSES FOR CERTIFICATION

17.T.140

Recording SCBA & Driving

When using FirePro to track SCBA use and driving dates, the Meetings & Training module is one of the places that you can record this information. Use the Other tab in the Attendance section to record SCBA usage and driving during a training session.

To learn more about monitoring SCBA usage and driving, go to:



[FirePro Tip O' the Week #109 - MONITORING SCBA & DRIVING](#)

17.T.150

Using Electronic ID's

FirePro 2 is compatible with a number of types of electronic ID's. You can use FirePro with an electronic scanner or reader to record electronic ID's for course registration purposes.

Note:

If you are interested in using electronic id's with FirePro, please contact Ingenious Software.

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The Action Menu

Most of the options available through the Meetings & Training Action Menu duplicate buttons found on the Meetings & Training form, the others are to assist you in locating specific Training records.

To learn more about the Action Menu options, go to:

[17.E](#)

17.T.170

Meeting & Training Reports

There are a number of customizable reports available for the Meetings & Training Module. There are 3 different areas where these reports are located.

Reports about Meetings and Training sessions, including times, comparisons or dates can be found in the:

[Reports](#)→[Management Report Menu](#)→[Training Menu](#)

To learn more about the Training Reports, go to:



[17.R](#)

Reports that deal with Firefighter attendance at Meeting & Training session can be found in the:

[Reports](#)→[Management Report Menu](#)→[Fire Fighters Menu](#)

To learn more about the FireFighters Reports, go to:



16.R

Reports that deal with an individual fire fighters training attendance can be accessed through the Training Tab buttons on the firefighter record.

To learn more about the Training Tab buttons, go to:

16.D.100