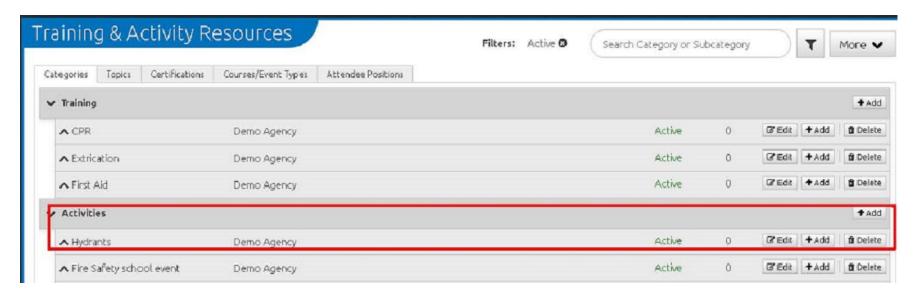# MEFIRS Training & Activity Module Hints

How to set up the Training & Activity Resources to document events

** This information is geared towards Agency Administrators in the MEFIRS system. A good video to watch in the Help/University about this topic is the one called "Training & Activities: A Short Overview". Training events and Activity events are set up the same way. **You can design your event resources before you open a new Training or Activity form**, **but REMEMBER: you don't NEED to design these resources before making training or activity records. However, setting up your resources beforehand can help organize information and assist with creating event templates for those events you do often.**

Designing your Training or Activity

The **Training & Activities Resources** module setup is done under the <u>Resources</u> tab. The five setup tabs are all **optional** and your department should use the ones you need to document your trainings & activities.**.**
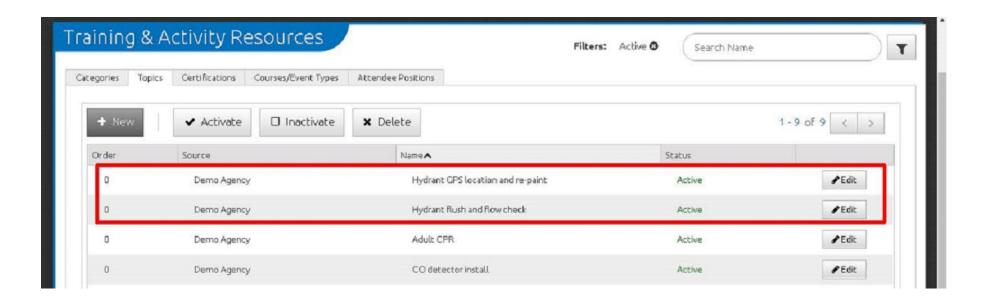
<u>*Categories tab*</u>: This is the tab where you set up general categories to help organize by topic. <u>To add a category</u>: click on the "+Add" button on the right side of the gray bar for either <u>Training</u> or <u>Activities</u>. Add the name of the category and choose "OK" to make it active. Example: An **Activity** category is made for <u>Hydrants.</u>
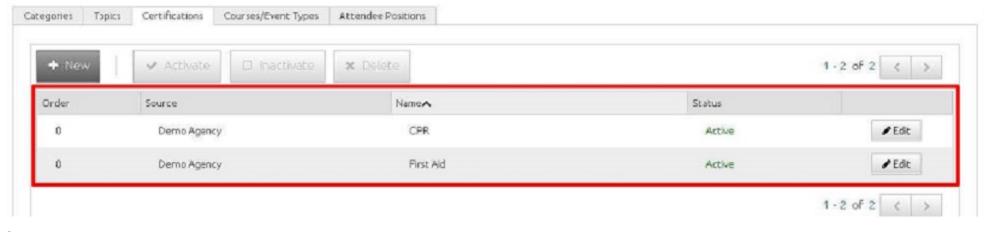

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Sub-categories further define your category (this is optional). To add a sub-category under a category: do the same steps as above, except you will be clicking on the "+Add" button on the right side of the bar that contains the category you want to add a sub-category under. Example: sub-categories "Wet-barrel hydrants" and "Dry-barrel hydrants" are added under the Hydrant category.
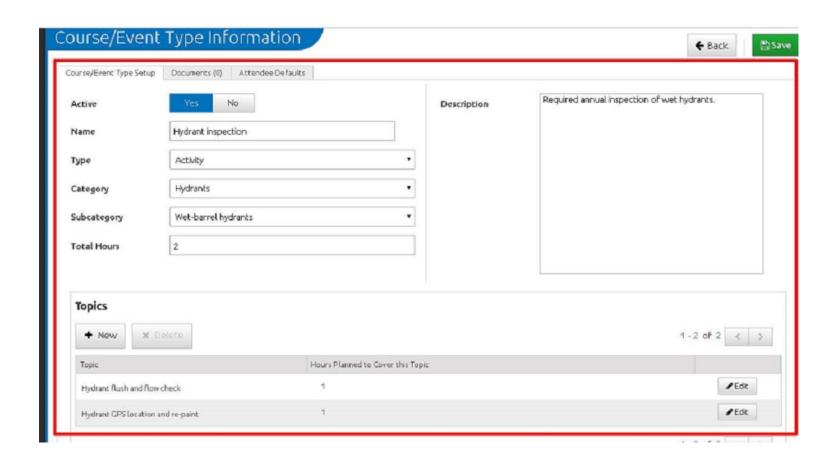
Topics tab: Further defines your categories and sub-categories: To add a topic: choose the "+New" button, enter your topic's name and choose "OK" to make it active . Example: topics "Hydrant flush and flow check" and "GPS location and re-paint" have been created.
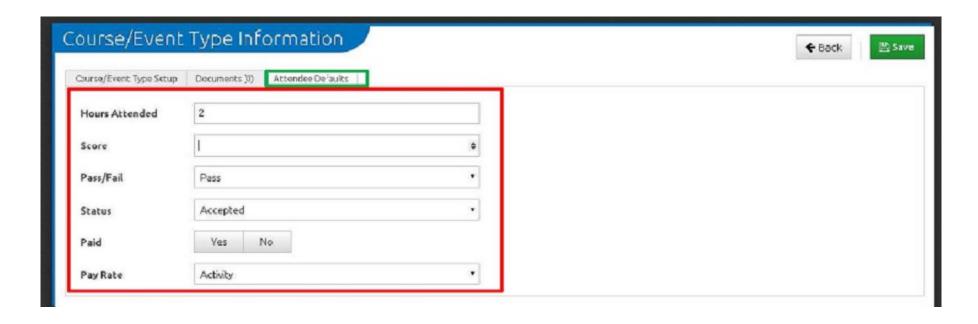

Certifications tab: Allows you to create a list of certification levels that are part of your training or activity events. You can add your own certification subjects using the "+New" button. Example: I've added certification categories for CPR and First Aid.
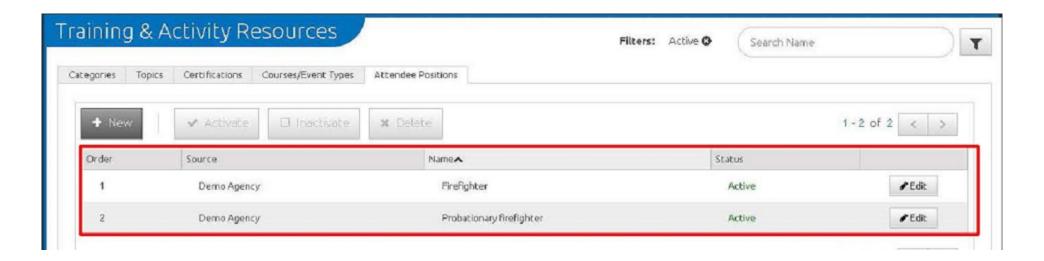
Course/Event Types tab: This is where many of the other tab's data come together to help you set up a course or event. You can add a new one to the list using the "+New" button. Enter a name for the course or event, pick from drop-down fields to define the course or event, and enter a description. You can use the Documents tab in this screen to attach documents for the course or event, and the Attendee Defaults tab allows you to set default information that will be used when you assign people to the event using a Training or Activity form (more about that in the next section). Example: a hydrant inspection activity has been created:

Set any Attendee default information for this event by clicking on the <u>Attendee Defaults</u> tab within the same screen and entering information. Choose the "**Back**" button to exit this group of tabs.

Attendee Positions tab: This is an optional tab that allows you to list the types of positions that could be added to the attendees grid in a training or activity form. You can add your own certification subjects using the "+New" button. Example: I've added position types "Firefighter" and "Probationary firefighter.

Documenting your Training or Activity

Creating Forms: You can make changes to the **Deploy Training** and **Deploy Activities** forms under the Tools tab in the Form Manager. Forms can be copied to your department's Form Manager, so you can modify them for your department. You can also create a form from scratch in the Form Manager by clicking on the Training or Activity button on the left side under the yellow "Create Form" section. You can also download **Training** or **Activity** forms from the Library.

To document a new Training or Activity event, go to the <u>Incidents</u> dropdown menu and switch your view to **Training and Activities**. Here you can open a new Training or Activity form, or view your Trainings or Activities already in the system. When you open a new form, you can pick from the fields you set up in the **Training & Activities Resources** module to complete your information. You can add attendees individually through the "Attendees" section of the form, or you can add multiple people by using the ***Attendees Power Tool*** on the upper-right side of the form. This is also where you would attach documents you may need for the training.

Printing options- when you have a form open, you can choose the blue **Print** icon at the top of the form for the following choices:

Attendees report
Blank Attendees report
Sign-in sheet
Blank sign-in sheet

A preview of the chosen report will open in a new tab in the Chrome browser. To print, click on the 3 vertical dots at the upper right side of the screen and choose "Print". You should see a screen that allows you to adjust print settings and print to a local printer, or you can choose to make a PDF version of the report to save onto your computer.

To delete or lock an activity, go to the **Menu** button at the bottom of the form (it has 4 horizontal lines), and make your choice.

Getting attendance hours for Training or Activity events

To get attendance summaries from the Trainings & Activities module, go to Report Writer and use the "**FMO Training/Activity attendees and hours**" report located in the **FMO Training & Activity Reports** **folder** under the **Shared Reports** section**.**

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