

# Personnel PPE and Training History



**Management Planning Systems**

# MPS

## Personnel PPE and Training History

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# Personnel PPE and Training History

## Description

### Stand Alone System

The Personnel PPE and Training History program is an integrated system containing information on personnel, their training history, PPE they have been issued, and safety inspection dates. The training history portion of the system contains information on each specific training session including: brief description, data, locations, number of hours or CEU's awarded and a list of all of the attendees.

### FileMaker Solution

This system is a shareware product produced using FileMaker Pro. Products developed with FileMaker Pro are called solutions.

### Function

This solution was designed to provide a single location for the maintenance of a record of all PPE issued to a single individual and the date the PPE was issued. In addition, the solution was designed as a single location for the maintenance of the training attended by each individual employee, especially safety training. Thus, the solution provides a means of meeting the OSHA training record requirements.

### Copyright

The Personnel PPE and Training History solution was developed by Management Planning Systems of Eugene, Oregon, who own the rights to the system. The files may be copied and used for up to 30 days on a trial basis demo to determine if you would like to purchase this system. However, the system may not be routinely used without the written permission of Management Planning Systems. The system is distributed and used in accord with the standard MPS Software License as shareware for \$29.95.

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# Installation of the Personnel PPE and Training History System

## Be Familiar with FileMaker

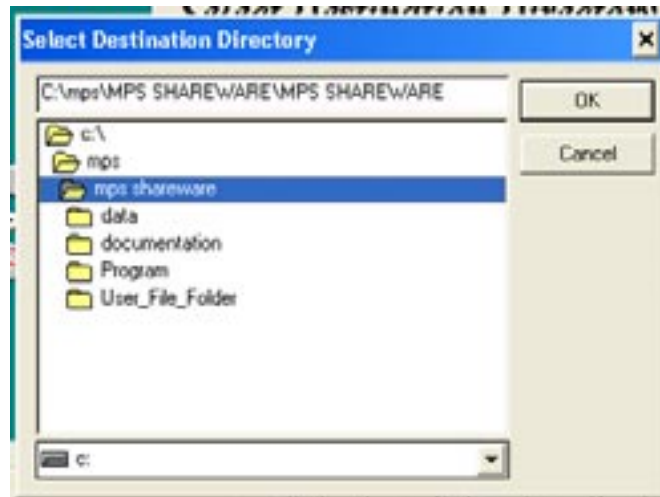
To be effective with the use of this data base the user should be familiar with functions of FileMaker Pro.

## Install

The program is installed following the install procedure found in the How to Install.pdf document on the CD.

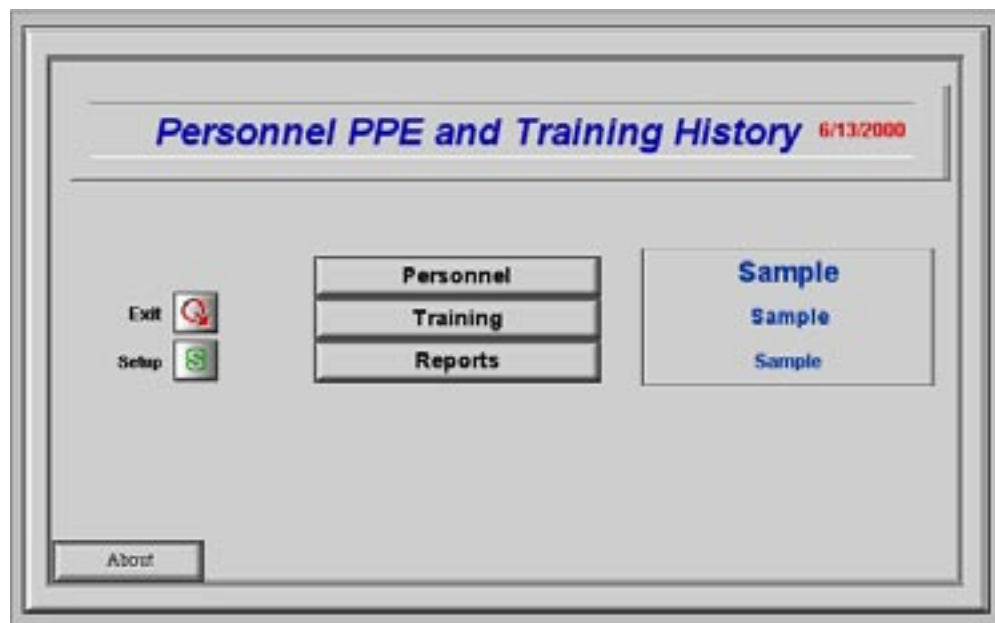
## Files and Folders

The install places a folder on the computer titled mps. Inside this folder are four additional folders. The data files are placed inside of the data folder. A copy of this manual is placed in the Documentation folder.



## Start the Program

The Personnel program may be opened from the Start Menu. Go to MPS Shareware. If Personnel is the only program installed the screen below will appear. If more than one shareware program has been installed the Launch Utility screen will appear, select People and the screen below will appear.

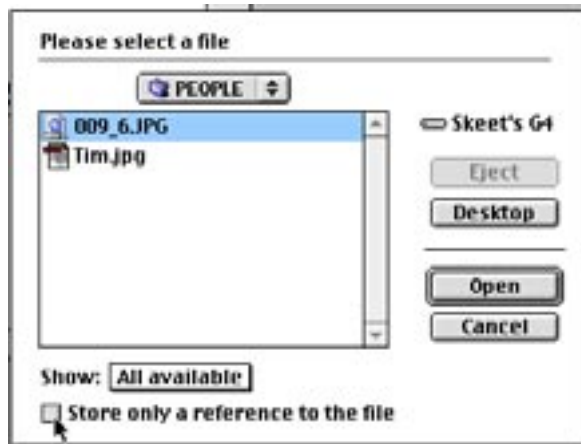


# Setup

## Organization Data

Click on the Setup button and the screen below should appear. Fill in the blanks. Everything typed into these windows will appear in various locations in the solution.

	Prefix	Next	Length	Sample	
Series 1	CE	-	8	4	CE-0008
Series 2	TC	-	8	4	TC-0008
Series 3	SC	-	6	4	SC-0006



## Three Classes of Employee

The setup screen allows the establishment of three different number schemes. These can be used to place employees into categories. To use this system provide a prefix of up to three characters for each number. The fill is not necessary but makes the number easier to read. Then enter in the next number to be used followed by the number of digits. An example of the number is presented on the right.

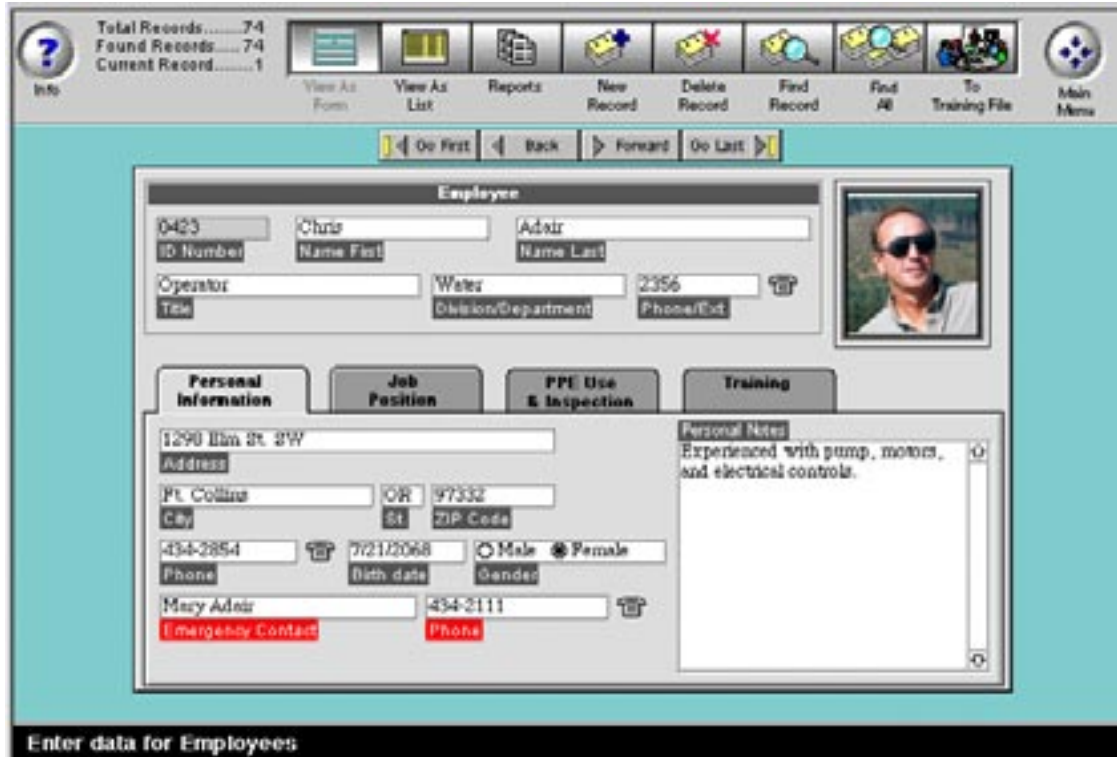
## Logo

The organization logo can be pasted into the logo field or imported from the File Menu > Import/Export> Import Picture. Be sure to select "Store only a reference to the file." This will keep the database file from growing in size the by the size of the graphic file.

Click on "Return to Menu" when completed.

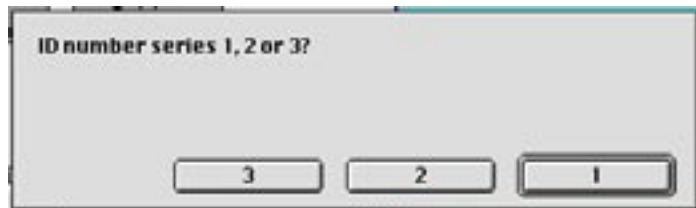
# Personnel File

The next step is the population of the Personnel files. Click on Personnel from the menu and the screen below should open.



## New Record

To enter a new record, click on New Record in the menu and a dialog box will appear.



Select the number series to be used for this employee. These numbers correspond to the numbers established in the Setup screen.

## Job Position

Fill in the appropriate data. To get a blank file for a new employee, just click on the "New Record" button. Items such as Pay Grade and Salary may be restricted by the company. If so do not fill in these fields.

The box in the upper right corner is a place holder for an employee photo. The photo can be almost any of the common computer based formats including JPEG, TIFF, and EPS.

## Personal Information

Click on the Personal Information tab and complete the data input.

# Using the System

## PPE and Inspections

From Menu

When PPE has been issued or an inspection has occurred click on the Personnel button located on the main menu. When the file opens select the PPE Use and Inspection tab. A screen as shown below will appear.

PPE Issued	Date Issued	Insp. Date	Inspection Results
Hard hat	8/2/2001	9/1/2001	All PPE in good conction
Traffic Vest	8/2/2001	10/2/2001	All PPE in good conction
Safety glasses	8/2/2001	11/5/2001	Missing a traffic vest
Back support	8/2/2001	12/3/2001	All PPE in good conction

Enter PPE and PPE Inspection Data

PPE

The PPE and date issued are entered directly into the fields shown. As the box of fields fill, the scroll bar along the right side will highlight indicated there are more fields below.

Inspections

The inspection fields are not an inspection of each individual PPE but a list of safety inspection this individual has been subject to. The inspection date and inspection results are entered directly into the fields.

# Training History

Training information is NOT entered into this file. When you click on the training tab you will get a screen that shows what training this individual has attended.

The screenshot shows a software interface with a top toolbar containing icons for 'View As Form', 'View As List', 'Reports', 'New Record', 'Delete Record', 'Find Record', 'Find All', and 'To Training File'. On the left, a status box shows 'Total Records.....74', 'Found Records..... 74', and 'Current Record.....41'. Below the toolbar are navigation buttons: 'Go First', 'Back', 'Forward', and 'Go Last'. The main content area features an 'Employee' form with fields for ID Number (0423), Name First (Chris), Name Last (Adair), Title (Operator), Department (Water), and Phone/Ext. (2356). A photo of Chris Adair is shown to the right. Below the form are four tabs: 'Personal Information', 'Job Position', 'PPE Use & Inspection', and 'Training'. The 'Training' tab is active, displaying a table with the following data:

Date	Course Title	Location	CEU's	Hrs	Score
2/11/2000	PPE Use	Frt. Collins		0.25	
2/11/2000	Confined Space Entry	Ft. Collins		6.0	

At the bottom of the interface, a black banner contains the text: 'Training data is shown from Training File'.

# Training File

## Courses

To enter a training course click on Training from the main menu and a screen as shown below should appear.


ID	First Name	Last Name	Test Score	CEU's	Hrs.
0057	John	Mitchell		0.25	
0427	Lucy	Adair		0.25	
0360	Jeff	Adams		0.25	
0427	Lucy	Adair		0.25	
0423	Chris	Adair		0.25	

## New Course

To enter information on a new course, click on the New Course button and fill in the training course information. To add participants to the course click in the ID field and a pop-up list of all of the employees will appear. Select each participant that attended the course.

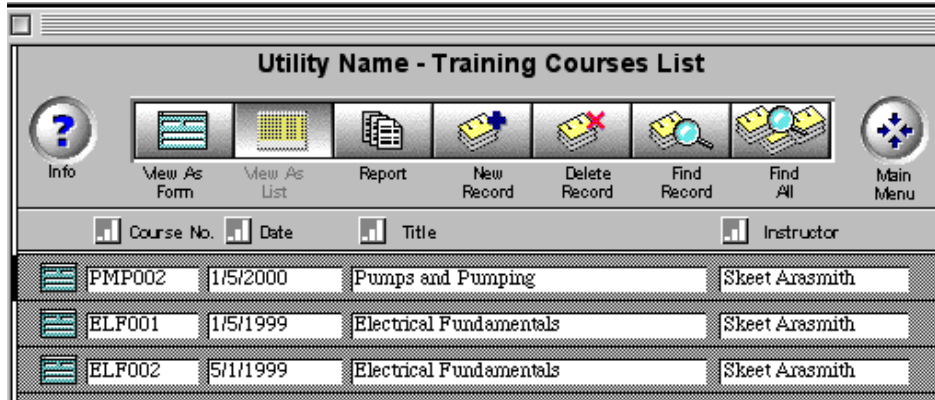


## Select a Participant


Clicking on the red arrow  to the left of an individual's ID number will take you directly to that individual's personnel file.

List View

Clicking on the View as List button will give you a list of all the courses. From the list view you can select any course which will return you to this screen.



Sort

Clicking on the sort icon  directly above a column will sort the data by the information in the selected column.

Select Course

To view a specific course, click on the small green Form icon to the left of the course number.

# Employee Reports

## Select Report

There are four reports built into this solution. They are Employee Phone List, Employee Report, Employee Full Report, and Employee Badge. They are accessed by clicking on the “Reports” button on any screen or from the main menu. When this button is pressed the following screen will appear.



## Select Contents

Each report will print only the records that have been selected. Selection is accomplished in either the View as Form or the View as List formats using the Find function.

## Select Report

After selecting the individual(s) needed for the report, select the report you want and it will appear in the screen. To print or cancel the report click on the Continue button at the left of the report. When the print dialog box appears click on Print to print and Cancel to cancel.

## Employee Reports

The contents of the Employee Report and the Employee Full Report can be altered by clicking on the box next to the PPE, Inspection, and Training list. Each item selected will be included in the report.

## Employee Badges

Employee badges can be printed using the Employee Badge selection.

## Report Examples

Below are examples of the reports.

## Employee Phone List

First Name	Last Name	Title	Division/Department	Phone
David	Addison		Wastewater	
Lino	Ameperosa		Wastewater	
Manu	Anetipa		Wastewater	
Manu	Anetipa		Wastewater	
Maugasolo	Aulava		Wastewater	
Joe	Brown		Wastewater	
Mike	Dworsky		Wastewater	
Talalelei	Eselia		Wastewater	
Faafouina	Faavae		Wastewater	
Afu	Filisi		Wastewater	
A'aitui	Inailau		Wastewater	
James	Kalepo		Wastewater	
Faalata	Kolone		Wastewater	
Tupufia	Leleu		Wastewater	
Sumeo	Leolo		Wastewater	
Fa'ipuaua	Mareko		Wastewater	
Neemia	Mareko		Wastewater	
Kuka	Matavao		Wastewater	
Kris	McPhee		Wastewater	

## Employee Report

ID	Name	CEUs	Hrs
0423	Chris Adair		
	<u>Training</u> 2/1/2000 PPE Use		0.25
	2/1/2000 Confined Space Entry		6.0
0427	Lucy Adair		
	<u>Training</u> 2/1/2000 PPE		0.25
	2/1/2000 PPE Training		0.25
0360	Jeff Adams		
	<u>Training</u> 2/1/2000 PPE		0.25
0161	Marlon Alexander		
	<u>Training</u> 2/1/2000 PPE Training		

## Employee Complete Report

ID  Name  Lino Ameperosa  
**Title**  **Department**  Wastewater **Phone/Extension**

**Personal Information**


**Address**  
**Home Phone**  **Date of Birth**  **Gender**  **Emergency Contact**  **Emergency Phone**


**Job Position**


**Manager**  **Date of Next Review**  **Pay Grade**  **Salary**  **Date of Hire**  **SSN**  575-19-3154 **Employee Type**


**Notes**


<u>Training</u>	1/5/2000	Pumps and Pumping	2.1
	5/1/1999	Electrical Fundamentals	2.1
<u>Inspection</u>	1/1/2001	all ok	
<u>PPE</u>	1/1/1997	Hard hat	
	3/1/1997	Pocket knife	
	4/1/1997	Pocket knife	


  
Info


  
View As Form


  
View As List


  
Reports

  
New Record

  
Delete Record

  
Find Record

  
To Training File

  
Main Menu

**Front**

Sample

Sample

Wastewater

---

David Addison

EMPLOYEE NO.

2

**Back**

SIGNATURE

IF FOUND, DROP IN MAILBOX.  
RETURN POSTAGE  
GUARANTEED.

March 8, 2002

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# Training Report

## Procedure

A report on one or more of the training sessions is obtained by first going to the training screen, selecting the session desired in the report, using the find function, then clicking on the report button. The desired data will appear on the screen. To print the report, click on Continue and the report will be sent to the printer.



## Example

Below is an example of the training report.

Training Report					
Course No.	Date	Title Description	Location	Instructor CLUs Hrs	
ELF001	1/5/1999	Electrical Fundamentals Electrical theory, control panel components, ladder	Setola	Sheet Arasmith 2.1	
	10	Afu	Filisi	2.1	
	12	James	Kolepo	2.1	
	13	Pealata	Kolone	2.1	
	28	Stacci	Soa	2.1	
ELF002	5/1/1999	Electrical Fundamentals Electrical theory, control panel components, ladder	Setola	Sheet Arasmith 2.1	
	3	Lino	Ameperosa	2.1	
	8	Mike	Dworsky	2.1	
	10	Afu	Filisi	2.1	
	12	James	Kolepo	2.1	
	13	Pealata	Kolone	2.1	
	25	Leo	Semata	2.1	
	33	Vauza	Tufa	2.1	
PMP002	1/5/2000	Pumps and Pumping Three-day course on pump operation, maintenance,	Setola	Sheet Arasmith 2.1	
				2.1	
	3	Lino	Ameperosa	2.1	
	12	James	Kolepo	2.1	
	16	Neema	Manku	2.1	
	21	Iouze	Pealata	2.1	
	25	Leo	Semata	2.1	

# Find Function

## From the Button Bar

### Select Find

A find button is included in the button bar of most screens. To perform a find click on this button and all of the data fields will go blank allowing you to enter the find criteria.



### Perform a Find

To perform a find, type the information you want to find into the field that contains the information and then press Continue, Return, or Enter. Notice all of the popup menus are available to assist in the find.

### Words or Letters

It is not necessary to type in all of the information. For example, if you wanted to find a name starting with a "C" you would only need to type the letter "C" and the program will find all of the personnel whose name starts with a "C."

### Multiple Fields

To clarify a find, you can type information into as many of the fields as is necessary to clarify the find. For example you can select the title and division and the program will find all of the individuals who have that title and work for the selected division.

### Multiple Finds

There are times when you may want to find more than one item in the same field. For example it may be necessary to select two or more pieces of data from the same field. Type in the first piece of data, then either type Control-N or select New Request from the Mode menu and type in the next request. (The number of request that can be made at one time is limited only to a particle limit.) If the status bar is turned on (see below for how to turn on the status bar) you can look through each request to make sure they are as desired.



When all of the requests are completed, press Return or Find in the Status bar.

### Omit Data

To omit records with specific information from a find, click in the Omit box after setting up the find. The result will be all of the records not omitted. To view those omitted use select the Find Omitted from the Select menu.

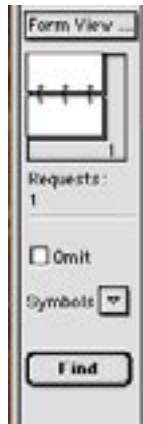


### Turn On Status Bar

The status bar allows access to a variety of find and other functions. To turn on the status bar, click on the status bar icon located near the bottom left of the screen.



What will appear will look similar to the image below.

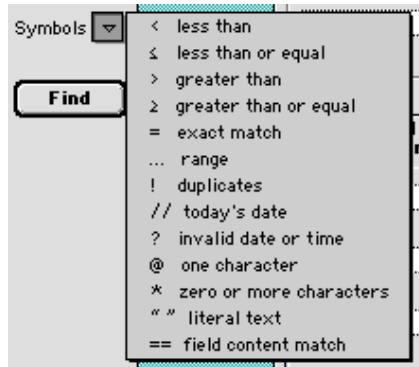


### Omit

The selected data can be omitted from the find by clicking on the Omit box located in the status bar or from the menu as described above.

### Find Symbols

Once the find function has been selected the status bar will open. Clicking on the small arrow next to the word Symbol will bring up an additional dialog box providing a number of symbols used to clarify finds.



## Two Most Common Symbols

Two of the most commonly used are the Range (...) and Exact Match (=).

### Range

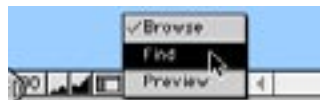
The range symbol can be used to select all of the individuals with birthdays between two dates. Type in the first date followed by three periods (...) or select the symbol and then the second date, then press the Continue button, return or enter keys.

### Exact Match

The exact match symbol is useful for finding records where a specific field is blank. To find records with no information in a specific field, type a = into a field or select = from the symbol menu. Then press the Continue button, return or enter keys.

## Find From the Menus

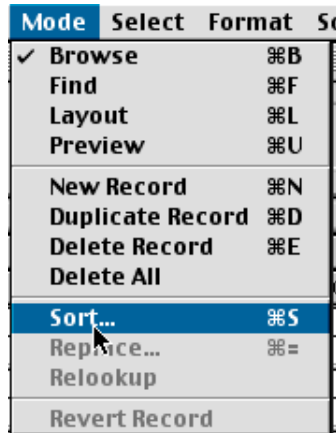
The find function can be invoked from the Mode menu, from the keyboard by typing Control F, or from the Mode Popup menu located at the bottom left of the screen.



# Sort Function

## Keyboard or Menu

The sort function can be obtained from the keyboard by typing Control S or selecting sort from the Mode menu. This procedure should only be used by those who have knowledge of FileMaker Pro.



## Dialog Box

When the sort command is invoked a dialog box will appear allowing you to select which selection of fields and the arrangement of fields for a sort.



## Select Fields

Select the field from the list on the left and then either double click or click Move to move the field to the right.



### Rearrange Fields

Once the fields have been moved to the right they can be rearranged. Place the cursor on the double arrow to the left of the field and the cursor changes to two lines with arrows. When this occurs click, hold, and move the field to the new position. When completed press Sort.

