

# REPORTS: MODIFICATION & CREATION

## RESFT 305

Instructor: John Morton



# Course Description

- + Modifying the available default FitPro reports
- + Overview of creating new customizable FitPro reports
- + Editing previously created FitPro reports
- + Followed by a Q & A session



# Course Key

Left Click



# Required Material

1. Personal Computer (PC) with FitPro Fit Test software v2.0 (or greater) installed



*provided with PortaCount Pro/Pro+*



# Let's begin...



- + Power on the PC with the FitPro Fit Test Software already installed





# Helpful Definitions

## Record

- A set of data pertaining to past events or entries.
- for example; saving a persons information into the FitPro Software creates a *People Record*

## Table

- A set of records arranged into rows and columns
- for example; The *People Table* contains a list of the *People Records*

## Report

- A document designed to present specific information (data) from a table and the records within
- for example; The Next Due Report would display only certain information from the *Fit Test Table*...who was due next





# Did You Know?

Database

FitProData.mdf

Table

People

Respirator

Fit Test,  
etc.

Record Field

Last Name

ID Number,  
etc.

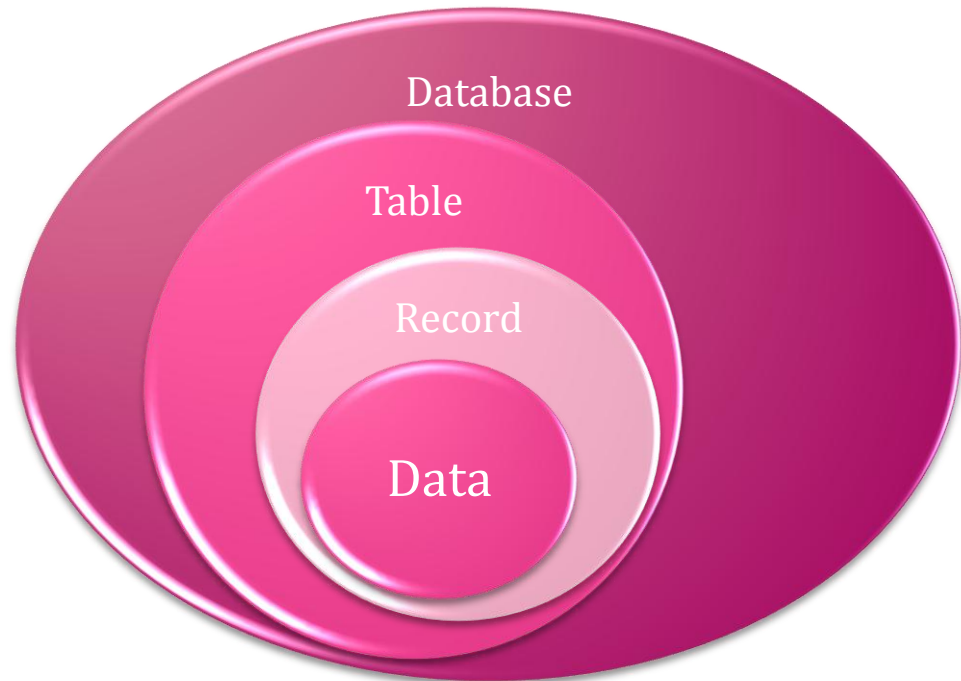
Make

Model, etc.

Fit Factors

Mask Size

Last Name,  
etc.



# Open the FitPro Software

2 ways to accomplish this:

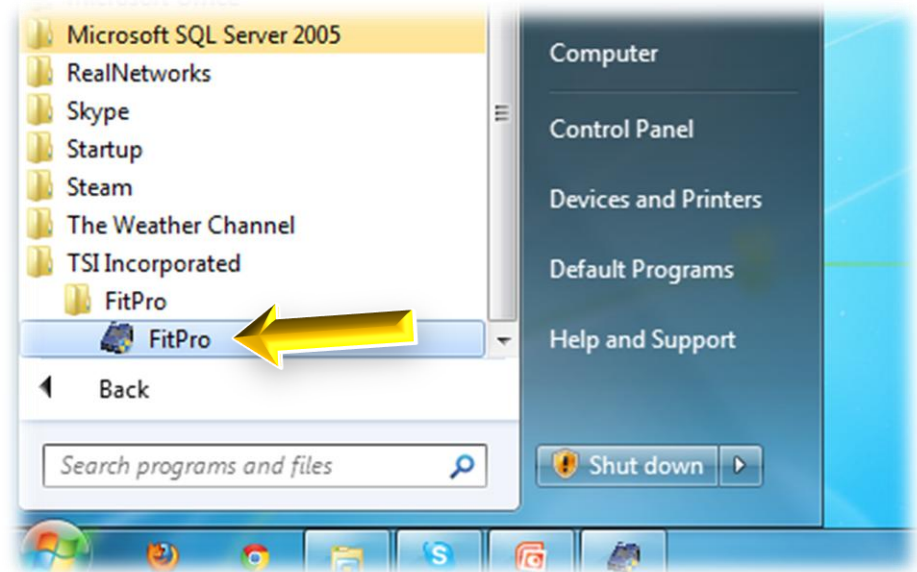
1. Double-Click the **FitPro** icon

- Located on desktop

**-or-**

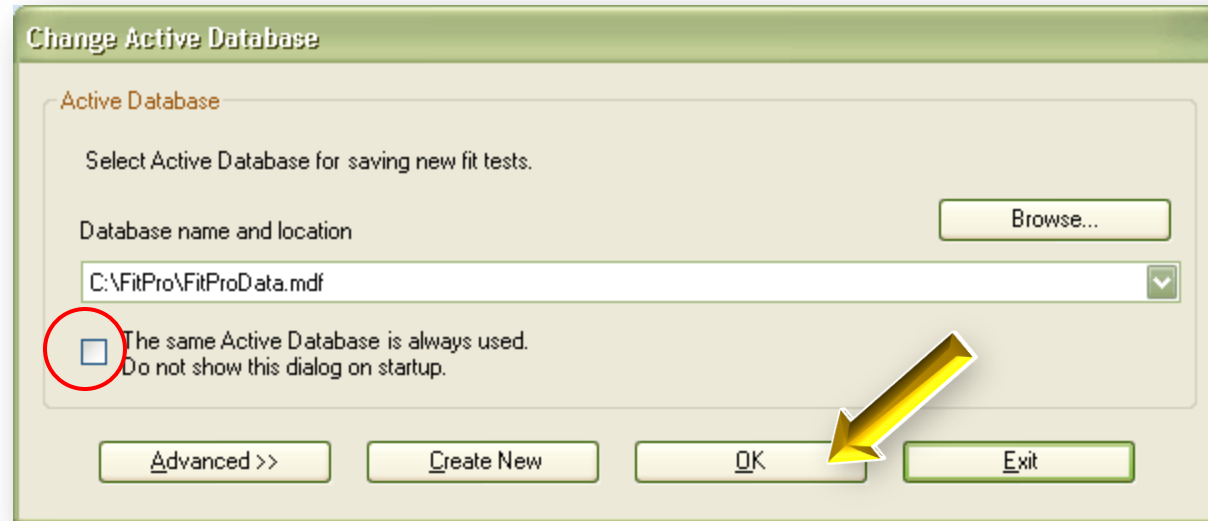
2. Open your **Start** menu, go to:

All Programs ► TSI Incorporated ► FitPro ► FitPro\_V2.0.x





# Change Active Database



This window appears when the “Same Active Database is always used” function has not been checked



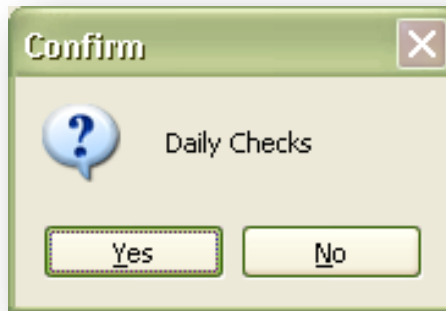
*If you always use the same FitPro database you may want to check this box as a convenience*



+ Click **OK**

# Selecting a Report

+ Select **No** when the Daily Checks prompt appears



+ Click on **Report** ► **Single Fit Test...**



# Single Fit Test Report

## FitPro Fit Test Software

Edit Fit Test Table

Sorted Records: YANG, LONG, 007, 4/28/2010 2:35:44 AM, 3M 9210 N95 DISPOSABLE [100]

ID Number	007	Note (Limit 128 Characters)	<div></div>	<div>View Results</div>		
Last Name	YANG					
First Name	LONG					
Company	ACME CHEMICAL CO					
Location	PLANT 3	PortaCount S/N	8038101311	<div>Print Card</div>		
Test Date M/d/yyyy	4/28/2010 2:35:44 AM	PortaCount M/N	8038_N95		DEPARTMENT	
Due Date M/d/yyyy	4/28/2011	Pass Level	100		CUSTOM2	
Mask Size	M	Overall Fit Factor	200+		CUSTOM3	
Operator	RG	Overall Pass	YES	CUSTOM4		
Protocol	OSHA 29CFR1910.134				<div>Save</div>	
Respirator	3M 9210 N95 DISPOSABLE [100]				<div>Exit</div>	

# Edit Fit Test Table

**Edit Fit Test Table**

Sorted Records: YANG, LONG, 007, 4/28/2010 2:35:44 AM, 3M 9210 N95 DISPOSABLE [100]

ID Number: 007

Last Name: YANG

First Name: LONG

Company: ACME CHEMICAL CO

Location: PLANT 3

Test Date M/d/yyyy: 4/28/2010 2:35:44 AM

Due Date M/d/yyyy: 4/28/2011

Mask Size: M

Operator: RG

Note (Limit 128 Characters)

PortaCount S/N: 8038101311

PortaCount M/N: 8038\_N95

Pass Level: 100

Overall Fit Factor: 200+

Overall Pass: YES

DEPARTMENT:

CUSTOM2:

CUSTOM3:

CUSTOM4:

Protocol: OSHA 29CFR1910.134

Respirator: 3M 9210 N95 DISPOSABLE [100]

View Results

Search

Delete

Print Card

Print Report

Save

Exit



# Edit Fit Test Table

Edit Fit Test Table

Sorted Records

YANG, LONG, 007, 4/28/2010 2:35:44 AM, 3M 9210 N95 DISPOSABLE [100]

ID Number

007

Last Name

YANG

First Name

LONG

Company

ACME CHEMICAL CO

Location

PLANT 3

Test Date  
M/d/yyyy

4/28/2010 2:35:44 AM

Due Date  
M/d/yyyy

4/28/2011

Mask Size

M

Operator

RG

Note (Limit 128 Characters)

PortaCount S/N

8038101311

PortaCount M/N

8038\_N95

Pass Level

100

Overall Fit Factor

200+

Overall Pass

YES

DEPARTMENT

CUSTOM2

CUSTOM3

CUSTOM4

Protocol

OSHA 29CFR1910.134

Respirator

3M 9210 N95 DISPOSABLE [100]

View Results

Search

Delete

Print Card

Print Report

Save

Exit



# Edit Fit Test Table

A vertical sidebar menu with a light beige background and a green header. It contains seven buttons with green borders and underlined text: 'View Results', 'Search', 'Delete', 'Print Card', 'Print Report', 'Save', and 'Exit'.

# Edit Fit Test Table

**Edit Fit Test Table**

Sorted Records: YANG, LONG, 007, 4/28/2010 2:35:44 AM, 3M 9210 N95 DISPOSABLE [100]

ID Number:

Last Name:

First Name:

Company:

Location:

Test Date M/d/yyyy:

Due Date M/d/yyyy:

Mask Size:

Operator:

Note (Limit 128 Characters):

PortaCount S/N:

PortaCount M/N:

Pass Level:

Overall Fit Factor:

Overall Pass:

DEPARTMENT:

CUSTOM2:

CUSTOM3:

CUSTOM4:

Protocol:

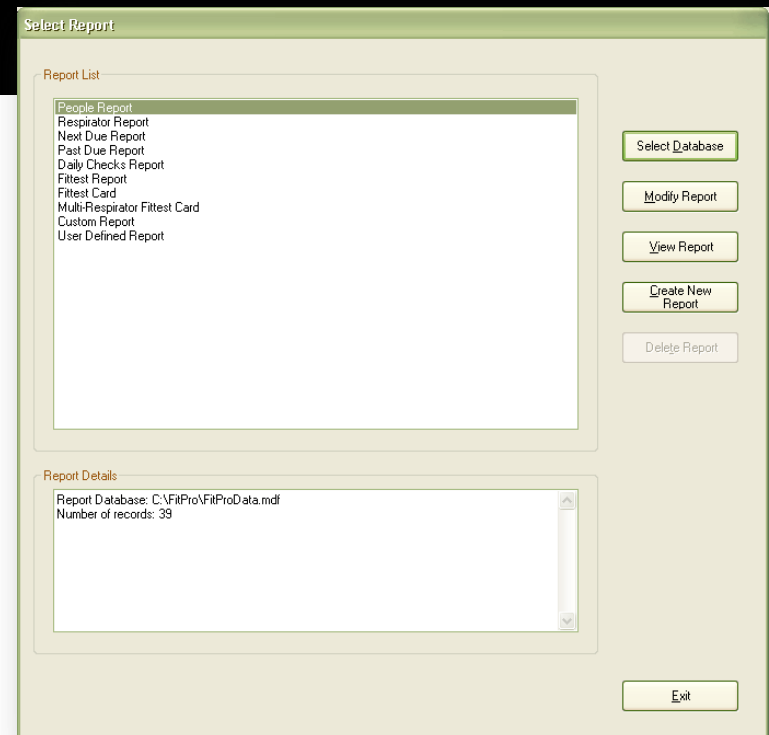
Respirator:



+ Click **Exit**

# Select Reports

## FitPro Fit Test Software





# Selecting a Report

+ Click on **Report** ► **Select Report...**



# Select Report

Select Report

Report List

- People Report
- Respirator Report
- Next Due Report
- Past Due Report
- Daily Checks Report
- Fittest Report
- Fittest Card
- Multi-Respirator Fittest Card
- Custom Report
- User Defined Report

Report Details

Report Database: C:\FitPro\FitProData.mdf  
Number of records: 39

## Pre-defined Reports

- Commonly requested data
- Easy to use format
- Ability to be modified

## User Defined Reports

- Customizable
- Ability to Save for future use
- Easily modified

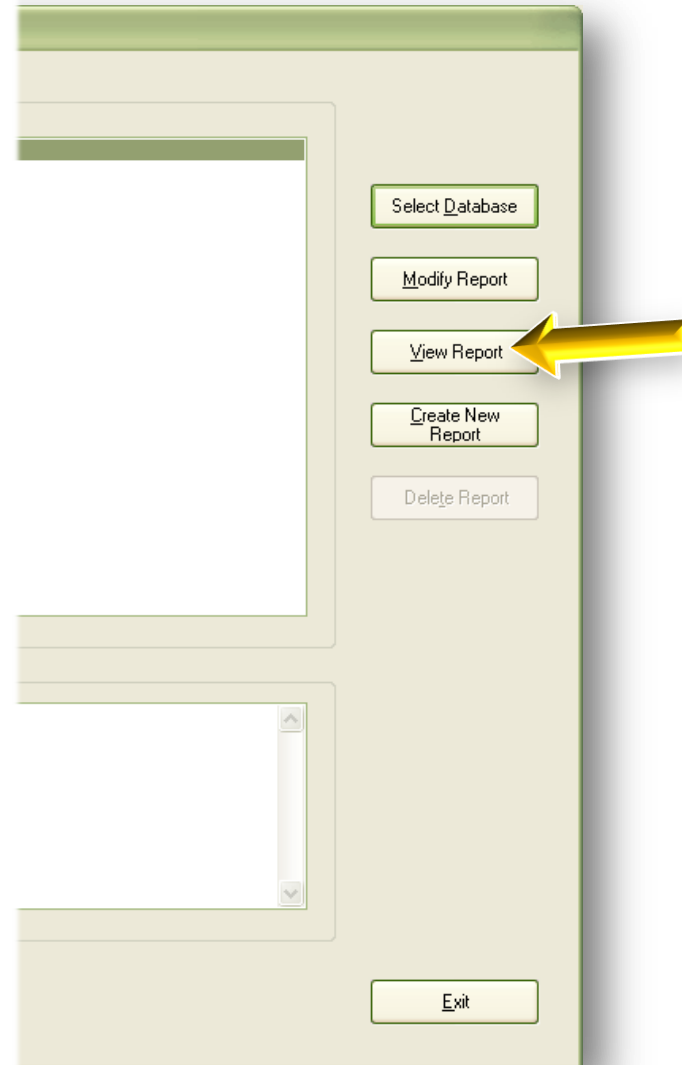


# Select Report

View  
Report

Create New  
Report

Modify  
Report



# Viewing Reports

Report Database: C:\FitPro\FitProData.mdf

8/27/2010

**PEOPLE REPORT**

LAST NAME	FIRST NAME	ID NUMBER	COMPANY	LOCATION
ALTMAN	LARRY	9384	ACME CHEMICAL CO	PLANT 3
ANDERSON	KEN	4564	ACME CHEMICAL CO	PLANT 1
BEARD	ROBERT	7853	ACME CHEMICAL CO	PLANT 1
BECKLER	DAVE	7981	ACME CHEMICAL CO	PLANT 3
BUERKLE	STEVE	7	TSI INC	SHOREVIEW
BUSCH	JEAN	4569	ACME CHEMICAL CO	PLANT 1
CHRISTOPHER	ANDY	1234	ACME CHEMICAL CO	PLANT 3
DAHL	KEVIN	1862	ACME CHEMICAL CO	PLANT 1
DOG	SUPER	16	HALL OF JUSTICE	PLANT 3
DOO	SCOOPY	007	ACME CHEMICAL CO	PLANT 3
ENGELHART	TIM	7681	ACME CHEMICAL CO	PLANT 1
FREEMAN	JAMES	4832	ACME CHEMICAL CO	PLANT 1
FUDD	ELMER	007	ACME CHEMICAL CO	PLANT 3
GAGNE	BUDD (RENE)	001	XCEL	MPLS
GOSSMAN	JEANNE	1097	ACME CHEMICAL CO	PLANT 3
JENSON	MARK	1837	ACME CHEMICAL CO	PLANT 2
JORDAN	MIKE	3786	ACME CHEMICAL CO	PLANT 3
KENT	CLARK	007	HALL OF JUSTICE	PLANT 3
KOHLER	JEFF	1976	ACME CHEMICAL CO	PLANT 3
LAYTON	ANN	7356	ACME CHEMICAL CO	PLANT 2
MARTINSON	KRISTY	1762	ACME CHEMICAL CO	PLANT 2
MEYER	CARIN	7396	ACME CHEMICAL CO	PLANT 2
MILTON	RUSS	1876	ACME CHEMICAL CO	PLANT 3
NEWBERG	TOM	7896	ACME CHEMICAL CO	PLANT 3
OLDHAM	PETER	1235	ACME CHEMICAL CO	PLANT 3
OLSON	ROBIN	4587	ACME CHEMICAL CO	PLANT 2
PALMER	JOHN	1846	ACME CHEMICAL CO	PLANT 3
PATRICK	ALLEN	007	ACME CHEMICAL CO	PLANT 1
PRESTON	ROGER	5557	ACME CHEMICAL CO	PLANT 3

Print Setup...  
Print Preview...  
Print  
Reset report column widths  
☒ Portrait  
☐ Landscape  
Exit



# Viewing Reports

Report Database: C:\FitPro\FitProData.mdf

8/27/2010

**PEOPLE REPORT**

LAST NAME	FIRST NAME	ID NUMBER	COMPANY	LOCATION
ALTMAN	LARRY	9384	ACME CHEMICAL CO	PLANT 3
ANDERSON	KEN	4564	ACME CHEMICAL CO	PLANT 1
BEARD	ROBERT	7853	ACME CHEMICAL CO	PLANT 1
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DAHL	KEVIN	1862	ACME CHEMICAL CO	PLANT 1
DOG	SUPER	16	HALL OF JUSTICE	PLANT 3
DOO	SCOOPY	007	ACME CHEMICAL CO	PLANT 3
ENGELHART	TIM	7681	ACME CHEMICAL CO	PLANT 1
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GAGNE	BUDD (RENE)	001	XCEL	MPLS
GOSSMAN	JEANNE	1097	ACME CHEMICAL CO	PLANT 3
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JORDAN	MIKE	3786	ACME CHEMICAL CO	PLANT 3
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KOHLER	JEFF	1976	ACME CHEMICAL CO	PLANT 3
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MEYER	CARIN	7396	ACME CHEMICAL CO	PLANT 2
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NEWBERG	TOM	7896	ACME CHEMICAL CO	PLANT 3
OLDHAM	PETER	1235	ACME CHEMICAL CO	PLANT 3
OLSON	ROBIN	4587	ACME CHEMICAL CO	PLANT 2
PALMER	JOHN	1846	ACME CHEMICAL CO	PLANT 3
PATRICK	ALLEN	007	ACME CHEMICAL CO	PLANT 1
PRESTON	ROGER	5557	ACME CHEMICAL CO	PLANT 3

Print Setup...  
Print Preview...  
Print  
Reset report column widths  
☒ Portrait  
☐ Landscape  
Exit



# Viewing Reports

Report Database: C:\FitPro\FitProData.mdf

8/27/2010

**PEOPLE REPORT**

LAST NAME	FIRST NAME	ID NUMBER	COMPANY	LOCATION
ALTMAN	LARRY	9384	ACME CHEMICAL CO	PLANT 3
ANDERSON	KEN	4564	ACME CHEMICAL CO	PLANT 1
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CHRISTOPHER	ANDY	1234	ACME CHEMICAL CO	PLANT 3
DAHL	KEVIN	1862	ACME CHEMICAL CO	PLANT 1
DOG	SUPER	16	HALL OF JUSTICE	PLANT 3
DOO	SCOOPY	007	ACME CHEMICAL CO	PLANT 3
ENGELHART	TIM	7681	ACME CHEMICAL CO	PLANT 1
FREEMAN	JAMES	4832	ACME CHEMICAL CO	PLANT 1
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GOSSMAN	JEANNE	1097	ACME CHEMICAL CO	PLANT 3
JENSON	MARK	1837	ACME CHEMICAL CO	PLANT 2
JORDAN	MIKE	3786	ACME CHEMICAL CO	PLANT 3
KENT	CLARK	007	HALL OF JUSTICE	PLANT 3
KOHLER	JEFF	1976	ACME CHEMICAL CO	PLANT 3
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NEWBERG	TOM	7896	ACME CHEMICAL CO	PLANT 3
OLDHAM	PETER	1235	ACME CHEMICAL CO	PLANT 3
OLSON	ROBIN	4587	ACME CHEMICAL CO	PLANT 2
PALMER	JOHN	1846	ACME CHEMICAL CO	PLANT 3
PATRICK	ALLEN	007	ACME CHEMICAL CO	PLANT 1
PRESTON	ROGER	5557	ACME CHEMICAL CO	PLANT 3

Print Setup...  
Print Preview...  
Print  
Reset report column widths  
☒ Portrait  
☐ Landscape  
Exit

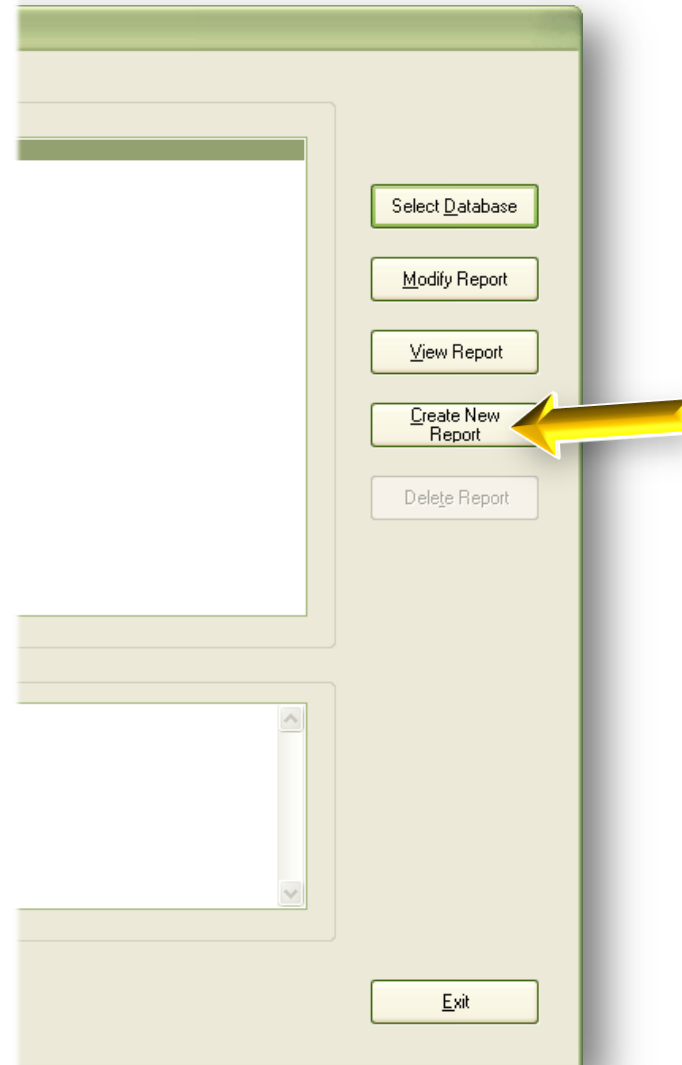


# Create New Report

View  
Report

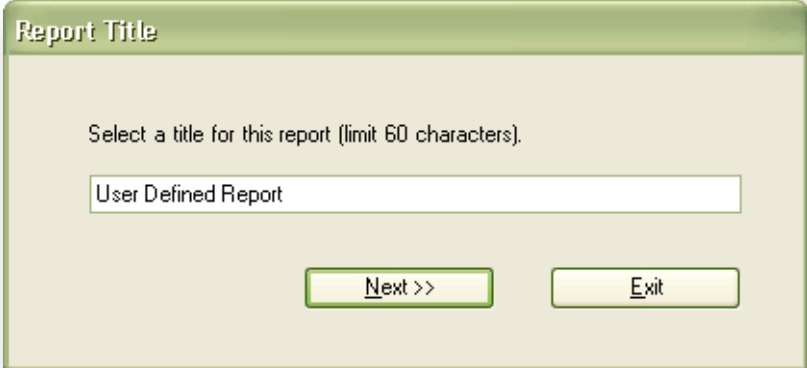
Create New  
Report

Modify  
Report



# Creating User Defined Reports

+ Click in **Title Name** box



Report Title

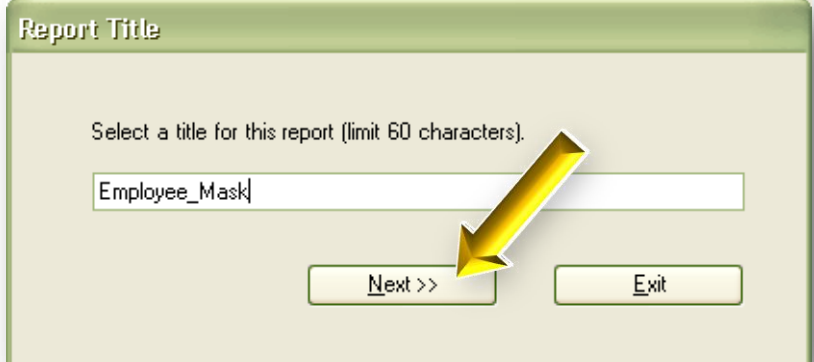
Select a title for this report (limit 60 characters).

User Defined Report

Next >> Exit

+ Type in “**Employee\_Mask**”

+ Click **Next>>**



Report Title

Select a title for this report (limit 60 characters).

Employee\_Mask

Next >> Exit

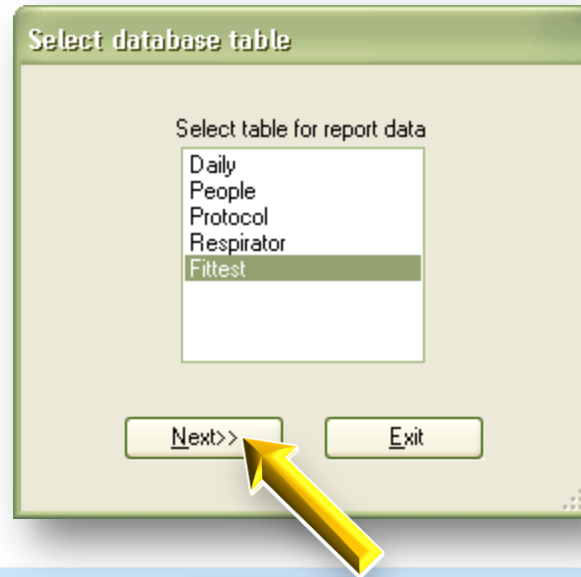




# Creating User Defined Reports

+ Select **Fittest** table

+ Click **Next>>**



Database

FitProData.mdf

Table

People

Respirator

Fit Test,  
etc.

Record Field

Last Name

ID Number,  
etc.

Make

Model, etc.

Fit Factors

Mask Size

Last Name,  
etc.



# Creating User Defined Reports

+ Select **LASTNAME**

Select fields to include in report

Available fields

- LASTNAME
- FIRSTNAME
- IDNUMBER
- COMPANY
- LOCATION
- PEOPLENOTE
- TESTDATE
- DUE DATE
- OPERATOR
- MASKSIZE
- RESPNAME
- MANUFACTURER
- MASKMODEL
- MASKSTYLE
- FFPASSLEVEL
- PROTOCOLNAME

Add>>

<<Remove

Selected fields

Column1 NONE

Column2 NONE

Column3 NONE

Column4 NONE

Column5 NONE

Column6 NONE

<<Back

Next>>

Exit



# Creating User Defined Reports

+ Click **Add>>**

Select fields to include in report

Available fields

- FIRSTNAME
- IDNUMBER
- COMPANY
- LOCATION
- PEOPLENOTE
- TESTDATE
- DUE DATE
- OPERATOR
- MASKSIZE
- RESPNAME
- MANUFACTURER
- MASKMODEL
- MASKSTYLE
- FFPASSLEVEL
- PROTOCOLNAME
- MODEL

Selected fields

Column1 LASTNAME

Column2 NONE

Column3 NONE

Column4 NONE

Column5 NONE

Column6 NONE

Add>>

<<Remove

<<Back

Next>>

Exit



# Creating User Defined Reports

+ Select **FIRSTNAME**

Select fields to include in report

Available fields

- FIRSTNAME
- IDNUMBER
- COMPANY
- LOCATION
- PEOPLENOTE
- TESTDATE
- DUE DATE
- OPERATOR
- MASKSIZE
- RESPNAME
- MANUFACTURER
- MASKMODEL
- MASKSTYLE
- FFPASSLEVEL
- PROTOCOLNAME
- MODEL

Selected fields

Column1: LASTNAME

Column2: NONE

Column3: NONE

Column4: NONE

Column5: NONE

Column6: NONE

Add>>

<<Remove

<<Back

Next>>

Exit



# Creating User Defined Reports

+ Click **Add>>**

Select fields to include in report

Available fields

- IDNUMBER
- COMPANY
- LOCATION
- PEOPLENOTE
- TESTDATE
- DUE DATE
- OPERATOR
- MASKSIZE
- RESPNAME
- MANUFACTURER
- MASKMODEL
- MASKSTYLE
- FFPASSLEVEL
- PROTOCOLNAME
- MODEL
- AMBIENTPURGE

Selected fields

Column1 LASTNAME

Column2 FIRSTNAME

Column3 NONE

Column4 NONE

Column5 NONE

Column6 NONE

Add>>

<<Remove

<<Back

Next>>

Exit



# Creating User Defined Reports

+ Select **RESPNAME**

Select fields to include in report

Available fields		Selected fields
IDNUMBER	<div>Add&gt;&gt;</div> <div>&lt;&lt;Remove</div>	Column1 LASTNAME
COMPANY		Column2 FIRSTNAME
LOCATION		Column3 NONE
PEOPLENOTE		Column4 NONE
TESTDATE		Column5 NONE
DUEDATE		Column6 NONE
OPERATOR		
MASKSIZE		
<b>RESPNAME</b>		
MANUFACTURE		
MASKMODEL		
MASKSTYLE		
FFPASSLEVEL		
PROTOCOLNAME		
MODEL		
AMBIENTPURGE		

<<Back      Next>>      Exit



# Creating User Defined Reports

+ Click **Add>>**

Select fields to include in report

Available fields		Selected fields
IDNUMBER COMPANY LOCATION PEOPLENOTE TESTDATE DUEDATE OPERATOR MASKSIZE MANUFACTURER MASKMODEL MASKSTYLE FFPASSLEVEL PROTOCOLNAME MODEL AMBIENTPURGE AMBIENTSAMPLE	<b>Add&gt;&gt;</b>	Column1 LASTNAME Column2 FIRSTNAME Column3 RESPNAME Column4 NONE Column5 NONE Column6 NONE
	<b>&lt;&lt;Remove</b>	

<<Back      Next>>      Exit



# Creating User Defined Reports

+ Select **MASKSIZE**

Select fields to include in report

Available fields		Selected fields
IDNUMBER	<div>Add&gt;&gt;</div> <div>&lt;&lt;Remove</div>	Column1: LASTNAME
COMPANY		Column2: FIRSTNAME
LOCATION		Column3: RESPNAME
PEOPLENOTE		Column4: NONE
TESTDATE		Column5: NONE
DUE DATE		Column6: NONE
OPERATOR		
<b>MASKSIZE</b>		
MANUFACTUREH		
MASKMODEL		
MASKSTYLE		
FFPASSLEVEL		
PROTOCOLNAME		
MODEL		
AMBIENTPURGE		
AMBIENTSAMPLE		

<<Back      Next>>      Exit





# Creating User Defined Reports

+ Click **Add>>**

The dialog box is titled "Select fields to include in report". It is divided into two main sections: "Available fields" on the left and "Selected fields" on the right. The "Available fields" section contains a list of fields: IDNUMBER, COMPANY, LOCATION, PEOPLENOTE, TESTDATE, DUE DATE, OPERATOR, MANUFACTURER, MASKMODEL, MASKSTYLE, FFPASSLEVEL, PROTOCOLNAME, MODEL, AMBIENTPURGE, AMBIENTSAMPLE, and AVGAMBIENT. The "Selected fields" section contains six columns, each with a dropdown menu: Column1 (LASTNAME), Column2 (FIRSTNAME), Column3 (RESPNAME), Column4 (MASKSIZE), Column5 (NONE), and Column6 (NONE). Between the two sections are two buttons: "Add>>" and "<<Remove". A yellow arrow points to the "Add>>" button. At the bottom of the dialog are three buttons: "<<Back", "Next>>", and "Exit".



# Creating User Defined Reports

+ Click **Next>>**

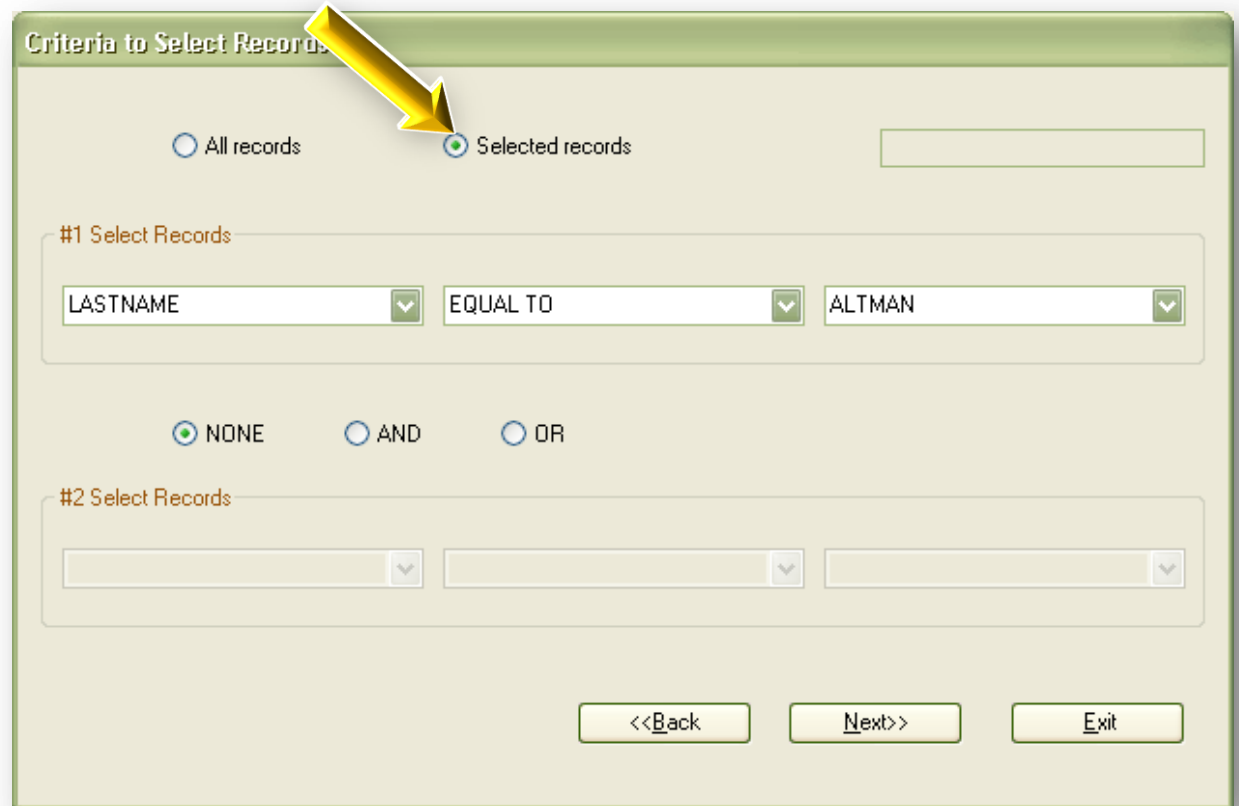
Select fields to include in report

Available fields		Selected fields
IDNUMBER COMPANY LOCATION PEOPLENOTE TESTDATE DUE DATE OPERATOR MANUFACTURER MASKMODEL MASKSTYLE FFPASSLEVEL PROTOCOLNAME MODEL AMBIENTPURGE AMBIENTSAMPLE AVGAMBIENT	<input type="button" value="Add&gt;&gt;"/> <input type="button" value=" &lt;&lt;Remove"/>	Column1 LASTNAME Column2 FIRSTNAME Column3 RESPNAME Column4 MASKSIZE Column5 NONE Column6 NONE



# Creating User Defined Reports

## + Click **Selected Records**



Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

LASTNAME EQUAL TO ALTMAN

☒ NONE ☐ AND ☐ OR

#2 Select Records

<<Back Next>> Exit

# Creating User Defined Reports

- + Click drop down arrow
- + Click on **LOCATION**

Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

LASTNAME EQUAL TO ALTMAN

LASTNAME  
FIRSTNAME  
IDNUMBER  
COMPANY  
LOCATION  
PEOPLENOTE  
CUSTOM1LABEL  
CUSTOM1DATA

☐ OR

<<Back Next>> Exit



# Creating User Defined Reports

- + Click on drop down arrow
- + Select **PLANT 3**

Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

LOCATION EQUAL TO

PLANT 1  
PLANT 1  
PLANT 2  
PLANT 3

☒ NONE ☐ AND ☐ OR

#2 Select Records

<<Back Next>> Exit



# Creating User Defined Reports

+ Click **Next>>**

Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

LOCATION EQUAL TO PLANT 3

☒ NONE ☐ AND ☐ OR

#2 Select Records

<<Back Next>> Exit



# Creating User Defined Reports

+ Select **LASTNAME**

Select fields to use for sorting

Select field(s) for sorting records. For example sort by last name or id.

Available fields

- LASTNAME
- FIRSTNAME
- RESPNAME
- MASKSIZE

Selected fields

Add >>

<< Remove

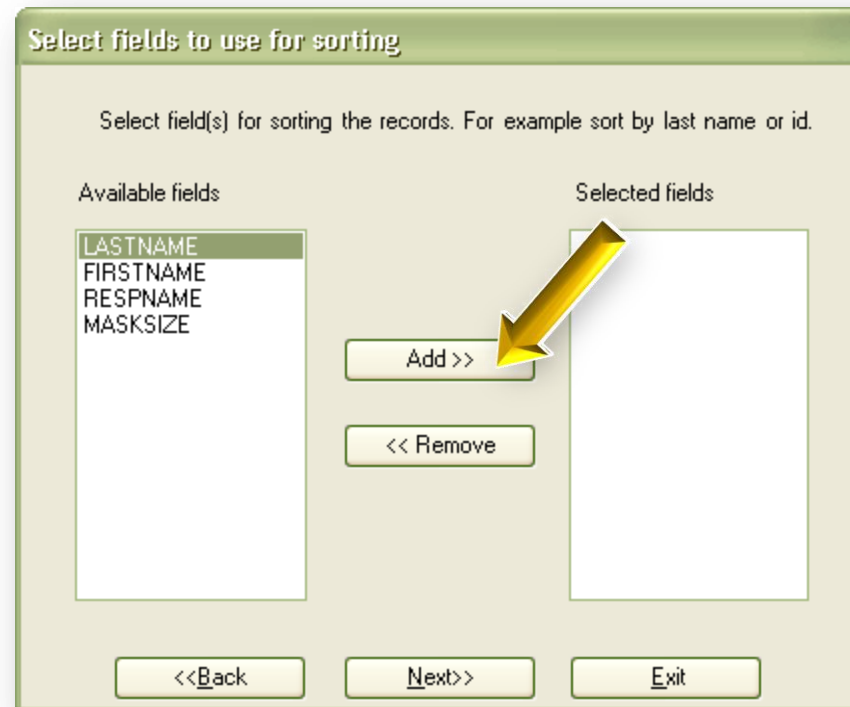
<< Back Next >> Exit



# Creating User Defined Reports

- + Select **LASTNAME**

- + Click **Add>>**





# Creating User Defined Reports


+ Click **Next>>**

**Select fields to use for sorting**

Select field(s) for sorting the records. For example sort by last name or id.

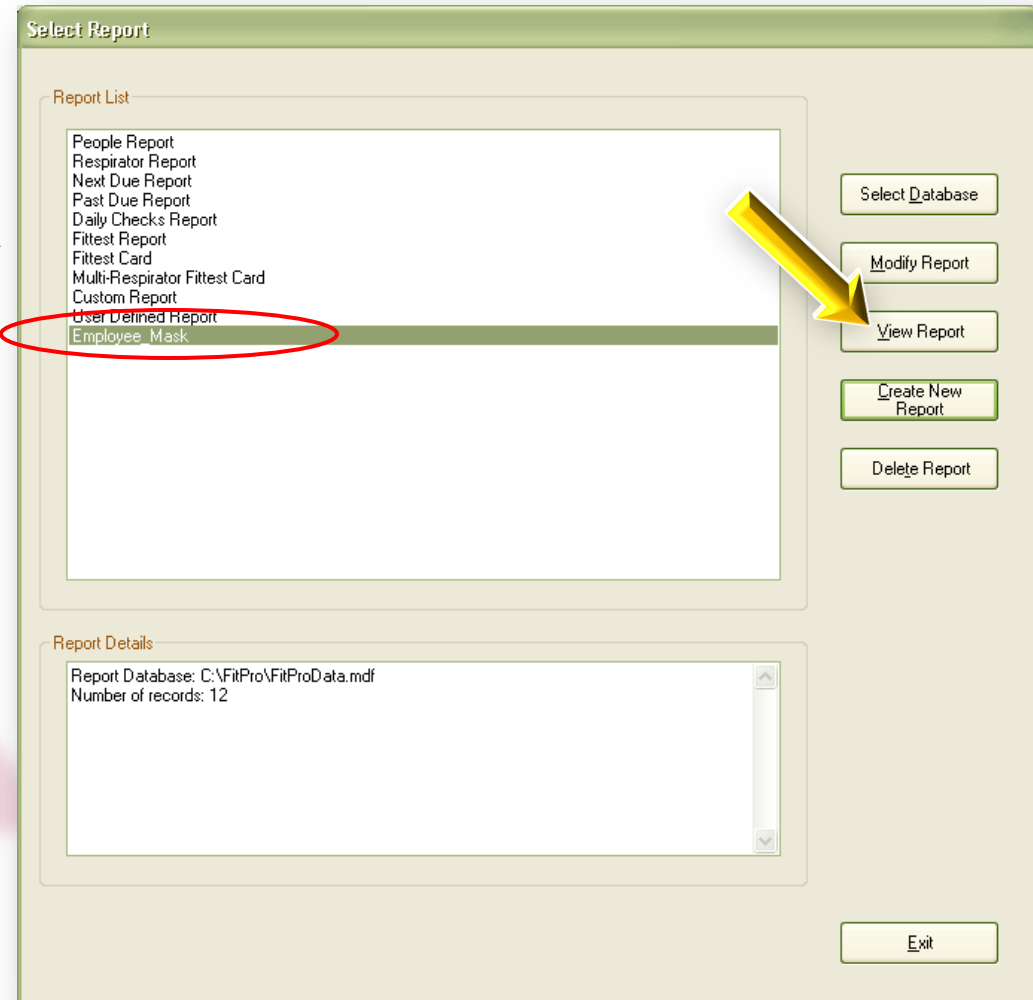
Available fields		Selected fields
FIRSTNAME RESPNAME MASKSIZE	Add >>	LASTNAME
	<< Remove	

<<Back   **Next>>**   Exit



# Creating User Defined Reports

+ Click **View Report**



# Creating User Defined Reports

Report Database: C:\FitPro\FitProData.mdf

8/27/2010

Employee\_Mask

<u>LASTNAME</u>	<u>FIRSTNAME</u>	<u>RESPNAME</u>	<u>MASKSIZE</u>
ALTMAN	LARRY	AVON SF12 FULL FACE [500]	MEDIUM
BECKLER	DAVE	3M 1860 N95 DISPOSABLE [100]	REGULAR
BECKLER	DAVE	3M 7500 FULL [500]	L
CHRISTOPHER	ANDY	MOLDEX 2700N N95 DISPOSABLE [100]	MED
CHRISTOPHER	ANDY	MSA MILLENNIUM FULL FACE [500]	L
DOO	SCOOBY	3M 7500 FULL [500]	L
GOSSMAN	JEANNE	NORTH 7700 SERIES HALF MASK [100]	MEDIUM
KOHLER	JEFF	SURVIVAIR OPTI-FIT FULL FACE [500]	MEDIUM
NEWBERG	TOM	GERSON 1730 N95 DISPOSABLE [100]	SMALL
PRESTON	ROGER	MSA COMFO II HALF MASK [100]	MEDIUM
RIVERS	RON	SEA SR100 HALF MASK [100]	LARGE
YANG	LONG	3M 9210 N95 DISPOSABLE [100]	M

Print Setup...

Print Preview...

Print

Reset report column widths

☒ Portrait

☐ Landscape

Exit

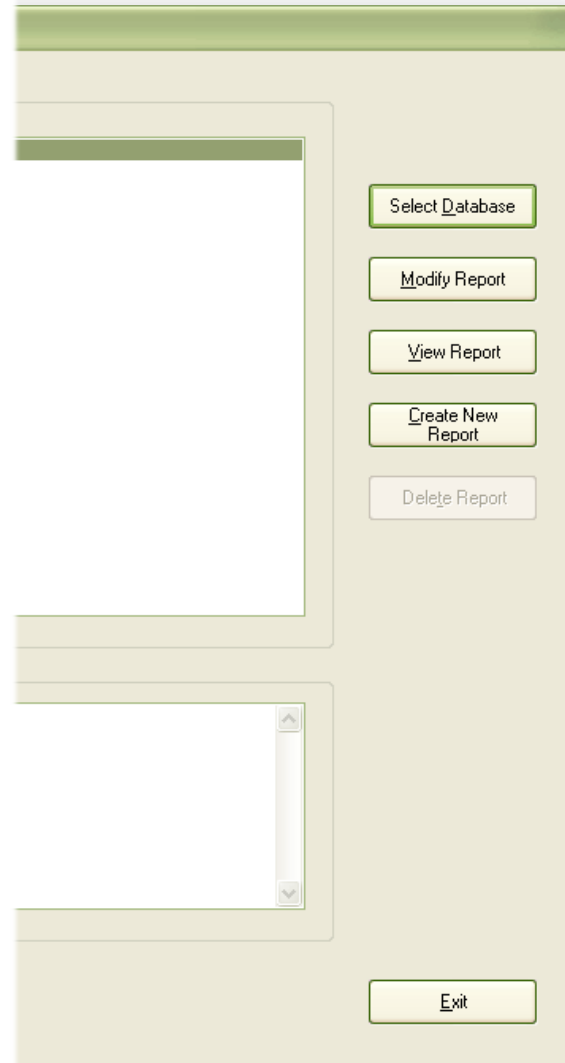


# Modify Report

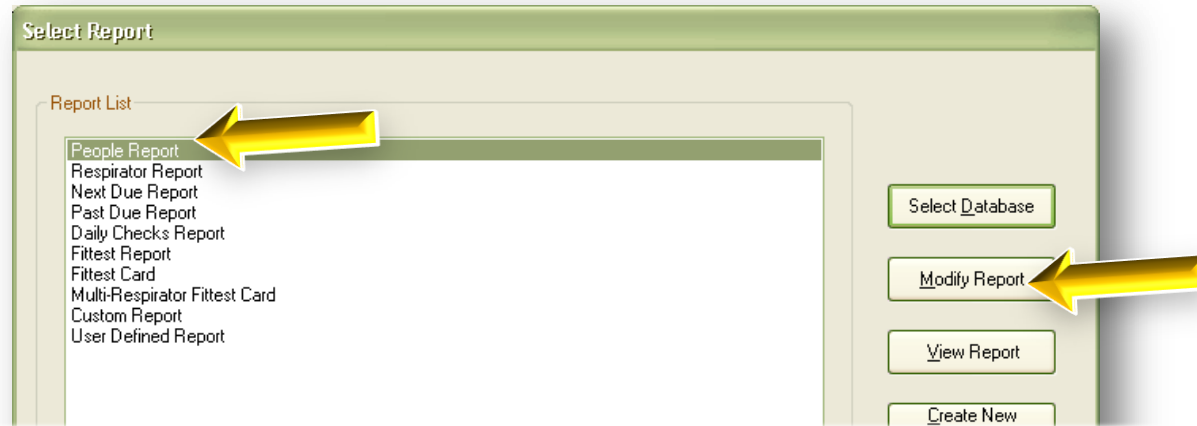
View  
Report

Create New  
Report

Modify  
Report



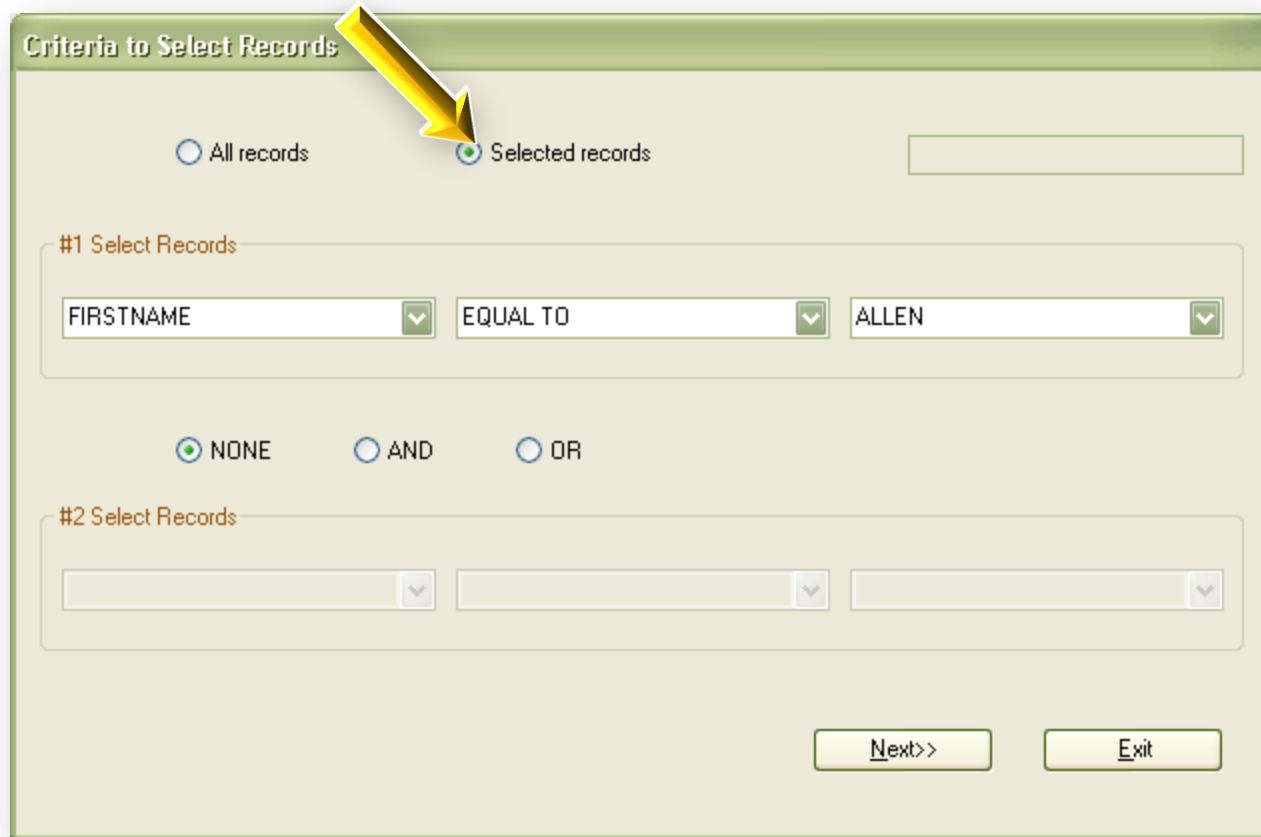
# Modify Report



- Select the **People Report**
- Click **Modify Report**



# Modify Existing Reports



Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

FIRSTNAME EQUAL TO ALLEN

☒ NONE ☐ AND ☐ OR

#2 Select Records

Next>> Exit

- Click Selected Records



# Modify Existing Reports

Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

FIRSTNAME EQUAL TO ALLEN

☐ OR

Next>> Exit

- Click on drop down arrow
- Select **LASTNAME**



# Modify Existing Reports

Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

LASTNAME GREATER THAN ALTMAN

☒ NONE ☐ AND

#2 Select Records

Next>> Exit

- Click on drop down arrow
- Select **GREATER THAN**





# Modify Existing Reports

Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

LASTNAME GREATER THAN

☒ NONE ☐ AND ☐ OR

#2 Select Records

Next>> Exit

- Click on drop down arrow
- Select **CHRISTOPHER** (first value)



# Modify Existing Reports

Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

LASTNAME GREATER THAN CHRISTOPHER

☐ NONE ☒ AND ☐ OR

#2 Select Records

FIRSTNAME EQUAL TO ALLEN

Next>> Exit

- Select AND

# Modify Existing Reports

Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

LASTNAME GREATER THAN CHRISTOPHER

☐ NONE ☒ AND ☐ OR

#2 Select Records

FIRSTNAME  
LASTNAME  
IDNUMBER  
COMPANY  
LOCATION  
PEOPLENOTE  
CUSTOM1LABEL  
CUSTOM1DATA

EQUAL TO ALLEN

Next>> Exit

- Click on drop down arrow
- Select **LASTNAME**



# Modify Existing Reports

Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

LASTNAME GREATER THAN CHRISTOPHER

☐ NONE ☒ AND ☐ OR

#2 Select Records

LASTNAME EQUAL TO ALTMAN

Next>> Exit

- Click on drop down arrow
- Select **LESS THAN OR EQUAL TO**



# Modify Existing Reports

Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

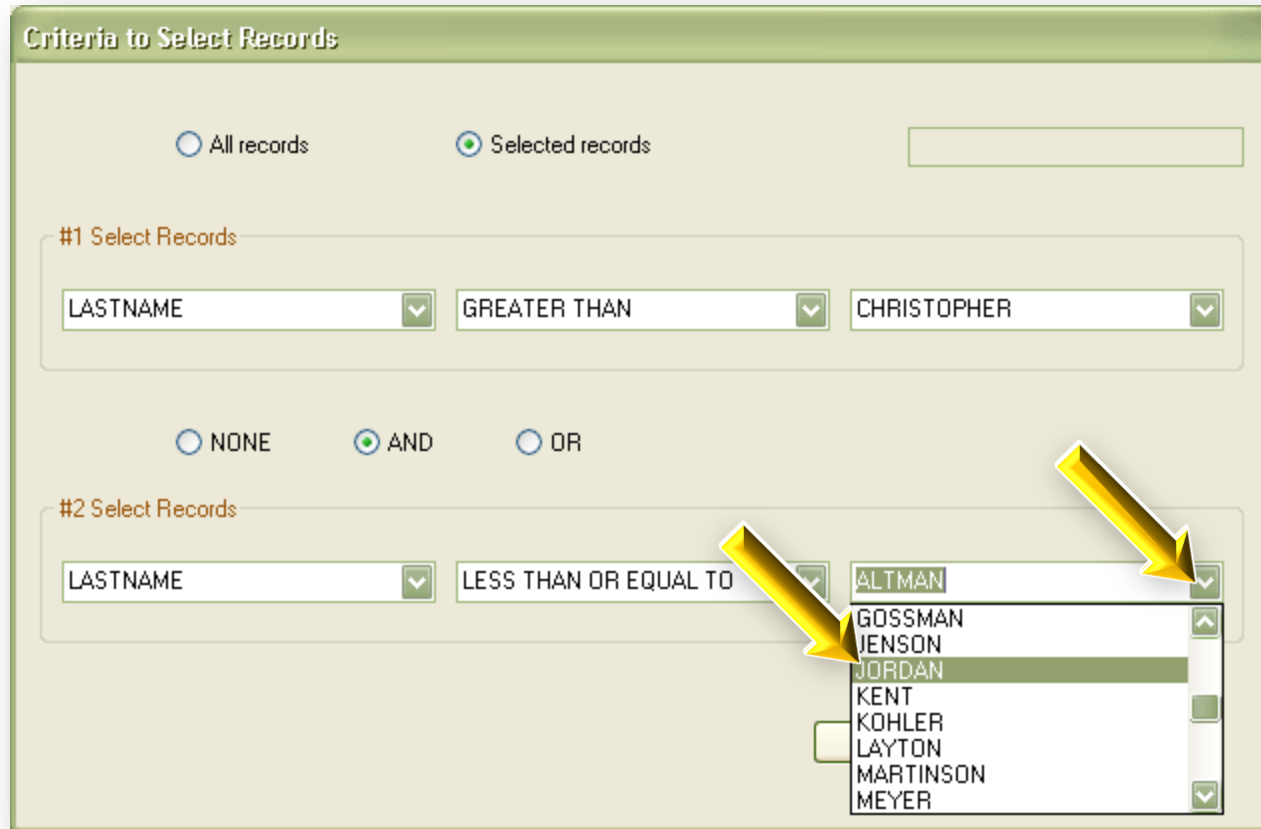
LASTNAME  CHRISTOPHER

☐ NONE ☒ AND ☐ OR

#2 Select Records

LASTNAME

ALTMAN  
GOSSMAN  
JENSON  
JORDAN  
KENT  
KOHLER  
LAYTON  
MARTINSON  
MEYER



- Click on drop down arrow
- Select **JORDAN** (second value)



# Modify Existing Reports

Criteria to Select Records

☐ All records ☒ Selected records

#1 Select Records

LASTNAME GREATER THAN CHRISTOPHER

☐ NONE ☒ AND ☐ OR

#2 Select Records

LASTNAME LESS THAN OR EQUAL TO JORDAN

Next>> Exit

- Click **NEXT>>**




# Modify Existing Reports

**Select fields to use for sorting**

Select field(s) for sorting the records. For example sort by last name or id.

Available fields		Selected fields
FIRSTNAME IDNUMBER COMPANY LOCATION	Add >>	LASTNAME
	<< Remove	

<<Back   **Next>>**   Exit



- Click **NEXT>>**



# Modify Existing Reports

Select Report

Report List

- People Report
- Respirator Report
- Next Due Report
- Past Due Report
- Daily Checks Report
- Fittest Report
- Fittest Card
- Multi-Respirator Fittest Card
- Custom Report
- User Defined Report

Report Details

Report Database: C:\FitPro\FitProData.mdf  
Number of records: 39

Before...

Select Report

Report List

- People Report
- Respirator Report
- Next Due Report
- Past Due Report
- Daily Checks Report
- Fittest Report
- Fittest Card
- Multi-Respirator Fittest Card
- Custom Report
- User Defined Report
- Employee\_Mask

Report Details

Report Database: C:\FitPro\FitProData.mdf  
Number of records: 10

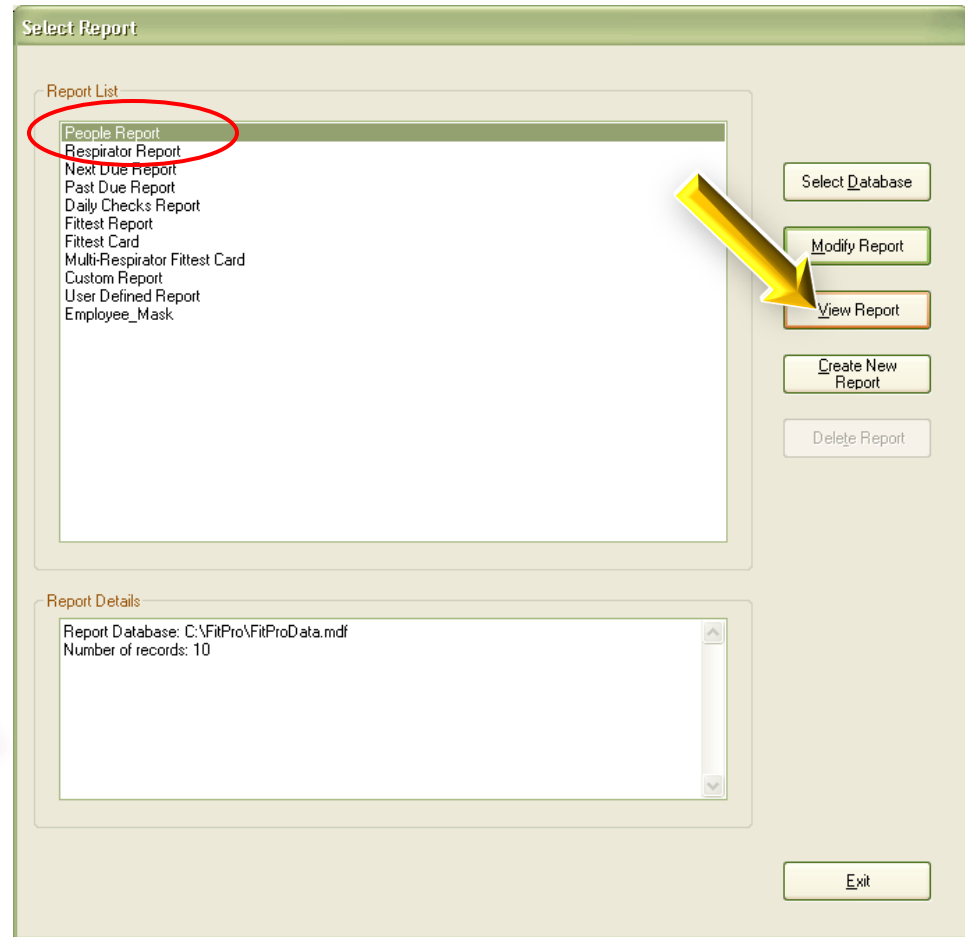
After...





# Modify Existing Reports

- Click **View Report**



# Modify Existing Reports

Report Database: C:\F11Pro\F11ProData.mdf

9/27/2010

PEOPLE REPORT

◀▶ <u>LAST NAME</u>	◀▶ <u>FIRST NAME</u>	◀▶ <u>ID NUMBER</u>	◀▶ <u>COMPANY</u>	◀▶ <u>LOCATION</u>
DAHL	KEVIN	1862	ACME CHEMICAL CO	PLANT 1
DOG	SUPER	16	HALL OF JUSTICE	PLANT 3
DOO	SCOOBY	007	ACME CHEMICAL CO	PLANT 3
ENGELHART	TIM	7681	ACME CHEMICAL CO	PLANT 1
FREEMAN	JAMES	4832	ACME CHEMICAL CO	PLANT 1
FUDD	ELMER	007	ACME CHEMICAL CO	PLANT 3
GAGNE	BUDD (RENE)	001	XCEL	MPLS
GOSSMAN	JEANNE	1097	ACME CHEMICAL CO	PLANT 3
JENSON	MARK	1837	ACME CHEMICAL CO	PLANT 2
JORDAN	MIKE	3786	ACME CHEMICAL CO	PLANT 3

Print Setup...

Print Preview...

Print

Reset report column widths

☒ Portrait

☐ Landscape

Exit

Last Name = D thru J



# Modify Existing Reports

Report Database: C:\F11Pro\F11ProData.mdf

9/27/2010

PEOPLE REPORT

◀ <u>LAST NAME</u>	◀ <u>FIRST NAME</u>	◀ <u>ID NUMBER</u>	◀ <u>COMPANY</u>	◀ <u>LOCATION</u>
DAHL	KEVIN	1862	ACME CHEMICAL CO	PLANT 1
DOG	SUPER	16	HALL OF JUSTICE	PLANT 3
DOO	SCOOBY	007	ACME CHEMICAL CO	PLANT 3
ENGELHART	TIM	7681	ACME CHEMICAL CO	PLANT 1
FREEMAN	JAMES	4832	ACME CHEMICAL CO	PLANT 1
FUDD	ELMER	007	ACME CHEMICAL CO	PLANT 3
GAGNE	BUDD (RENE)	001	XCEL	MPLS
GOSSMAN	JEANNE	1097	ACME CHEMICAL CO	PLANT 3
JENSON	MARK	1837	ACME CHEMICAL CO	PLANT 2
JORDAN	MIKE	3786	ACME CHEMICAL CO	PLANT 3

Print Setup...

Print Preview...

Print

Reset report column widths

☒ Portrait

☐ Landscape

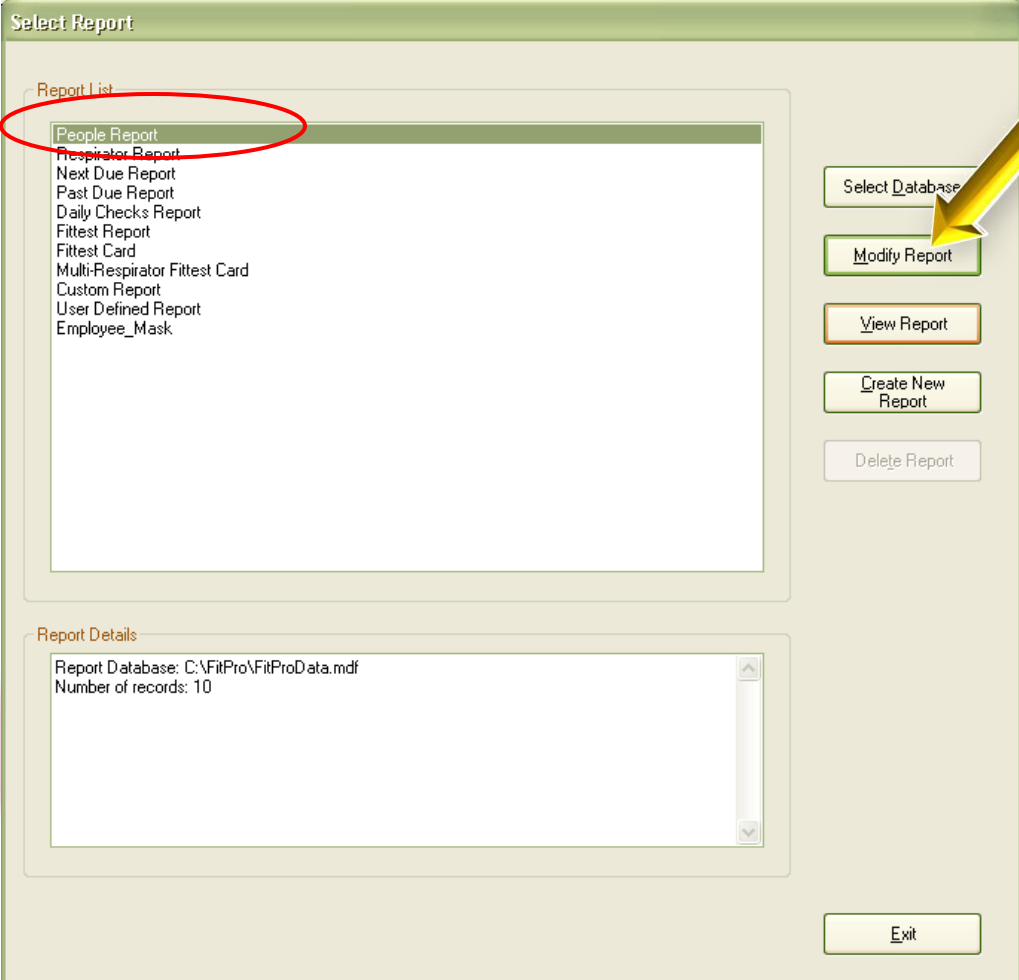
Exit

- Click **Exit**



# Modify Existing Reports

- Click **Modify Report**



The screenshot shows a software window titled "Select Report". It contains a "Report List" section with a scrollable list of report types. The "People Report" is highlighted with a red circle. To the right of the list are several buttons: "Select Database", "Modify Report" (highlighted with a yellow arrow), "View Report", "Create New Report", and "Delete Report". At the bottom of the window is an "Exit" button. Below the "Report List" is a "Report Details" section with a text area showing "Report Database: C:\FitPro\FitProData.mdf" and "Number of records: 10".

Select Report

Report List

- People Report
- Respirator Report
- Next Due Report
- Past Due Report
- Daily Checks Report
- Fittest Report
- Fittest Card
- Multi-Respirator Fittest Card
- Custom Report
- User Defined Report
- Employee\_Mask

Report Details

Report Database: C:\FitPro\FitProData.mdf  
Number of records: 10

Select Database  
Modify Report  
View Report  
Create New Report  
Delete Report  
Exit



# Modify Existing Reports

Criteria to Select Records

☒ All records ☐ Selected records

#1 Select Records

☐ NONE ☒ AND ☐ OR

#2 Select Records

- Select All Records
- Click **NEXT>>**




# Modify Existing Reports

Select fields to use for sorting

Select field(s) for sorting the records. For example sort by last name or id.

Available fields		Selected fields
FIRSTNAME IDNUMBER COMPANY LOCATION	Add >>	LASTNAME
	<< Remove	

<<Back   **Next>>**   Exit



- Click **NEXT>>**

# Modify Existing Reports

Select Report

Report List

- People Report
- Respirator Report
- Next Due Report
- Past Due Report
- Daily Checks Report
- Fittest Report
- Fittest Card
- Multi-Respirator Fittest Card
- Custom Report
- User Defined Report
- Employee\_Mask

Report Details

Report Database: C:\FitPro\FitProData.mdf  
Number of records: 10

Before...

Select Report

Report List

- People Report
- Respirator Report
- Next Due Report
- Past Due Report
- Daily Checks Report
- Fittest Report
- Fittest Card
- Multi-Respirator Fittest Card
- Custom Report
- User Defined Report

Report Details

Report Database: C:\FitPro\FitProData.mdf  
Number of records: 39

After...



# Summary

- + Looked at the Single Fit Test Report window
- + Reviewed the default Reports
- + Discussed the options for Creating a New Report, customizable
- + Went over the process of modifying those reports





# PortaCount Academy

## Online Training Center

- Available at the PortaCount Academy website;  
[www.tsi.com/PCacademy](http://www.tsi.com/PCacademy)

## Answers

- Available at [www.tsi.com/PCacademy](http://www.tsi.com/PCacademy) and  
[www.tsi.com/portacount](http://www.tsi.com/portacount)

