SQL SERVER PORTACOUNT® 804x DETAILED INSTRUCTIONS V2



APPLICATION NOTE RFT-027 (US)

Based on current Data approach, Customers seeking SQL Server with 804x/FPU fall into four categories:

FitPro Ultra v4.6.0 includes a set of support files (README.pdf and four SQL script files) that are distributed with the software.

*The support files are located in the FitPro Ultra installation directory (typically "C:\Program Files (x86)\TSI\FitPro Ultra") in a folder called, "MS SQL Support".

CATEGORY 1: No current data
New, first time 804x customers (never owned any prior version of PortaCount).
These customers are in the process of purchasing (1 or more) 804x units and for a variety of
reasons [#] , these customers are required to use SQL Server from the very get-go, and do not have
any prior data to migrate.
Steps (to begin using SQL Server for 804x/FPU)
1. DBA Steps**
a. Create DB
 Run SQL script to create FPU tables – "CreateFitPro4Tables.sql"
2. Start FPU
3. Give a name for the SQL Server DB, then type in the DB string (given by DBA) to
connect to DB
a. Select the "Data Management" option
Edit Database
Active Database
SQL Server)
Database type O SQLITE
SQL MS SQL MS SQL CONNECTION STRING (REQUIRED)
NOTES
ENTER NOTES HERE
<u>A</u>
CANCEL SAVE
h Carro the databases information and "Carro" it
D. Save the database information and Save It.
c. Upen the side menu and make the SQL Server active

**Step 1 (DBA Steps) is a common step for all four customer categories. TSI does not provide SQL server software this is a Microsoft product) required to be purchased by customer. The minimum version SQL Server required to work with FPU is v16 (but you can create newer/greater versions). The customer's Database Admin (IT Dept.) needs to do this #Variety of reasons include information security and data storage policy, expected high volumes of fit tests, etc.



	Database List = FILTER			NEW
	Name	Location	Active	Actions
	Default Database	C:\Users\Public\Documents\TSI\po-804x-node\d		:
	SQL Server	MS SQL	~	:
	SQL Server Ultra	MS SQL		🖍 Edit
				(i) Details
				Export
				▲ Import
				⊞ Custom Fields
				I Protocols
				i Delete
				✓ Set Active
4 Fxit FPI	I			
T. Calad				
5. Go back	INTO FPU			

Note – These steps need to be performed for every computer that will connect to the instrument(s). Steps above are one-time only, so long as customer moves forward to the new data management approach of SQL Server. If at some point the customer switches to SQL Lite and creates SQL Lite data which later need to be moved over to SQL Server, then they would need to follow instructions in Category 2.

CATEGORY 2: Currently store data in SQL Lite with FPU

Existing customers who already own (1 or more) 804x units.

These customers have been using SQL Lite data management option in FPU, but now for a variety of reasons[#], are seeking to switch over to SQL Server option being offered with FPU and they need to migrate all their stored SQL Lite data into SQL Server.

Steps* (to begin using SQL Server for 804x/FPU)

- 1. DBA Steps**
 - a. Create DB
 - b. Run SQL script to create FPU tables "CreateFitPro4Tables.sql"
- 2. Start FPU
- 3. Give a name for the SQL Server DB, then type in the DB string (given by DBA) to connect to DB
 - a. Select the "Data Management" option

A	ctive Data	base			
NAME (REQ	UIRED)				
3QL 36	vei				
Database	type				
O SQLIT	E				
MS S					
MS SQL CO	NNECTION ST	RING (REQU	JIRED)		
NOTES					
ENTER N	OTES HER	E			
				_	-

- b. Save the database information and "Save" it.
- 4. Export (from SQL Lite DB)
 - a. Select Data Management
 - b. Make the SQLite database the active database and then select "Export":

Manage Data			
Database List Triller			
Name	Location	Active	Actions
Default Database	ChUsen/Public Documents/TSPpc-804x-node/d	~	
SQL Server	MS SQL		🖌 Edit
SQL Server Ultra	MS BOL		Details
			T Export
			₫ Import
			i≣ Custom P
			-

5. Select the Database table(s), the delimiter and Location. The Location is the Location displayed in the previous screen.

		Export (Default Database)
		DATABASE TABLE People
		DELIMITER Comma -
		LOCATION C:\Users\Public\Documents\TSI\pc-804x-nod BROWSE
		CANCEL
6.	Click the "ex	xport" button.

**Step 1 (DBA Steps) is a common step for all four customer categories. TSI does not provide SQL server software - this is a Microsoft product) required to be purchased by customer. The minimum version SQL Server required to work with FPU is v16 (but you can create newer/greater versions). The customer's Database Admin (IT Dept.) needs to do this #Variety of reasons include information security and data storage policy, expected high volumes of fit tests, etc.

7. Impor	ting into SQL S	erver			
a.	Select Data M	anagement			
b.	Open the side	e menu again and	select "Impo	ort". The	following form will
	appear:	0	•		5
	ChilearesPubl	ie\Daeumante\TSI\ne-804v.neda\d SF)	_ ~		
	People	•			
	DELIMITER				
	Comma	•			
	Overwrite dupl database	icate records in destination			
	C:\Users\ronald.ezuck	\Documents\peopsql1. BROWS			
		CANCEL IMPORT			
	_				
С.	Do this same	process for each	of the tables		
8. Exit F	PU				
9. Start I	FPU				
a.	Open the side	e menu and make	the SQL Ser	ver active	e
	Database List = FILTE	R		NEW	•
	Name	Location	Active	Actions	
	Default Database	C:\Users\Public\Documents\TSI\p	-804x-node\d	:	
	SQL Server	MS SQL	\checkmark	:	
	SQL Server Ultra	MS SQL		🧨 Edit	
				 Details 	
				★ Export	
				🗄 Import	
				E Custom Fields	
				Protocols	
				Delete	
				✓ Set Active	

Note – These steps need to be performed for every computer that will connect to the instrument(s). These steps need to be performed per SQL Lite DB that needs to be migrated to SQL Server. If the DBs have some duplicate data between them, the import step in FPU will prompt for "override" or "skip" for each duplicate. Steps above are one-time only, so long as customer moves forward to the new data management approach of SQL Server and retires current data management approach. If at some point the customer switches to SQL Lite and creates SQL Lite FPU data which later need to be moved over to SQL Server FPU data, then they would need to repeat these instructions under Category 2.

CATEGORY 3: Currently store data in Access with FP+

Existing customers, owning (1 or more) 803x units, and in process of upgrading (some or all) 803x to 804x units.

Currently these customers use Access data management option in FP+. For a variety of reasons[#] they seek the SQL Server data management option when they upgrade to 804x. They need to migrate their stored FP+ data into SQL Server and this data migration needs to be performed during the 804x upgrade.

Steps* (to begin using SQL Server for 804x/FPU)

- 1. DBA Steps**
 - a. Create DB
 - b. Run SQL script to create FPU tables "CreateFitPro4Tables.sql"
 - 2. Start FPU
 - 3. Give a name for the SQL Server DB, then type in the DB string (given by DBA) to connect to DB
 - a. Select the "Data Management" option

Edit [Databas	e			
	Active Da	itabase			
NAME (F SQL S	REQUIRED) Server				
Databa	se type				
O SQ					
O MS					
MS SQL	CONNECTION	N STRING (REQUIRED)		
NOTES					
ENTER	NOTES H	IERE			
			CA	NCEL	SAV

- b. Save the database information and "Save" it.
- 4. Exit FPU
- 5. Start FP+
- 6. Export FP+ data note the directory and name of the .csv file

a.	Go to	"Data l	Record	Tools"	in the	"Database"	menu	option
----	-------	---------	--------	--------	--------	------------	------	--------

Database	Rash Drive
Source database	
Default (Access Datab	base) 🗸
Records to include People Respirator Protocol Fit Test	People Respirator Potocol Saved selection filters All Records Saved Filter Define Filter Feld Comparison Value Logic * * * * *
User Configuration	
Preview Selection	Luns name instituene Company Luciacon indichie People record selected
Database	Text File Rash Drive Delete
Destination dat	abase v
	Сору
 A 100 - 100 - 100 	

**Step 1 (DBA Steps) is a common step for all four customer categories. TSI does not provide SQL server software - this is a Microsoft product) required to be purchased by customer. The minimum version SQL Server required to work with FPU is v16 (but you can create newer/greater versions). The customer's Database Admin (IT Dept.) needs to do this #Variety of reasons include information security and data storage policy, expected high volumes of fit tests, etc.

ord Source								
Database	Rash Drive							
urce database								
Vefault (Access Databa	ase)	~						
cords to include People	P	eople	Respirator	Protoc	ol			
Respirator	Sa	wed selection filte	ers Al Records		~	Save Filter	Delete Filter	
Protocol		Field		Comparison		Value	Logic	
Fit Test						-	-	
User Configuration	Last	Name First	Name C	Company	Location	Inactiv	re	
User Configuration	0 People r	Name First	Name C	Company	Location	Inactiv	re	
User Configuration	0 People r Text File	Name First	Name C	Company	Location	Inactiv	ve	
User Configuration Preview Selection Automatic cord Destination Database Destination File	0 People r Text File	Name First	Name C	Company	Location Record ty	Inactive pe to export	re	
Z User Configuration	0 People r Text File	Name First record selected Flash Drive flaut_People.csv	Name C	Company Delete Browse	Record ty	pe to export	re	
User Configuration Preview Selection Automatic cord Destination Detabase Destination C:\Users Vonaid ezuck C:\Users Vonaid ezuck	0 People r Text File	Name First record selected Flash Driv fault_People.csv	Name C	Company Delete Browse	Record ty	pe to export	re	
User Configuration Preview Selection Automatic Automatic Codd Destination Database Destination File C:\Users \ronald exuck Column delimter Gourn delimter Column (SD)	0 People r Text File	Name First record selected Flash Ditv fault_People.csv Text enco	Name C	Delete Browse	Record ty Peopl Respi Respi	pe to export	re	
∠ User Configuration Preview Selection Image: Configuration Image: Configuration Image: Configuration Database Destination File CC: Users vonaid ezuck Column delimiter Image: One configuration Image: C	Last O People r Text File	Name First record selected Flash Driv fault_People.csv © UTF-1	Name C	Company Delete Browse	Record ty Peopl Respi Proto Fit ter	pe to export e rator col	re	

- c. Select the "Comma" Column delimiter, "UTF-8" Text encoding, and table (Record type to export).
- d. Select a "Destination File". This is the file that will be imported into FitPro Ultra.
- e. Click "Export". This creates a file, here named FITTEST_Peopl.csv.
- f. Repeat this same process for each of the tables listed (People, Respirator, Protocol, Fit test and Daily Check).
- 7. Exit FP+
- 8. Start FPU
 - a. Select the "Data Management" option. Add the new SQL Server database to the application if it has not been previously installed
 - b. Open the side menu and make the SQL Server active

Database List	= FILTER			NEW
Name		Location	Active	Actions
Default Database		C:\Users\Public\Documents\TSI\	pc-804x-node\d	:
SQL Server		MS SQL	~	:
SQL Server Ultra		MS SQL		🧨 Edit
				 Details
				Export
				🛓 Import
				\equiv Custom Fields
				E Protocols
				Delete
				Set Active

c. Open the side menu again and select "Import". The following form will appear

DATABASE TABLE		
People	•	
DELIMITER		
Comma	•	
Overwrite dupl database	icate records in des	stination
LOCATION C:\Users\ronald.ezucl	<pre>k\Documents\peops</pre>	ql1. BROWSE

- d. Select the "DATABASE TABLE" and the delimiter (Comma) as selected when exporting from the FitPro Plus database.
- e. At this point duplicate records can either be added or overwritten in the new database.

f.	Enter (or browse) to the location of the exported (.CSV) file and select it. Press "IMPORT". The data should be transferred to the SQL Server database. A message will be displayed indicating the number of records transferred.			
	Import Completed			
	Successfully imported 105 Records			
	Labels for custom fields must be configured as they exist in records. Failure to do so may cause data to be incorrectly displayed.			
	DONE			
g.	Repeat this process for each of the Respirators, Fit test and Daily Chec	other tables listed in FitPro Plus (People, k).		
9. Exit FI	יט			
10. Go bac	k into FPU			

Note – These steps need to be performed for every computer that will connect to the instrument(s). These steps need to be performed per Access DB that needs to be migrated to SQL Server. If the DBs have some duplicate data between them, the import step in FPU will prompt for "override" or "skip" for each duplicate. Steps above are one-time only, so long as customer moves forward to the new data management approach of SQL Server and retires current data management approach. If at some point the customer switches to SQL Lite and creates SQL Lite FPU data which later need to be moved over to SQL Server FPU data, then they would need to repeat these instructions under Category 2

CATEGORY 4: Currently store data in SQL Server with FP+

Existing customers, owning (1 or more) 803x units, and in process of upgrading (some or all) 803x to 804x units.

Currently these customers are already using SQL Server data management option in FP+ and seek to continue using SQL Server data management option when they upgrade to 804x. They need to migrate their stored FP+ SQL Server data into FPU SQL Server and this data migration needs to be performed during the 804x upgrade.

Steps* (to begin using SQL Server for 804x/FPU)

- 1. DBA Steps**
 - a. Create DB
 - b. Run SQL script to create FPU tables "CreateFitPro4Tables.sql"
- 2. Additional DBA Step
 - a. Run SQL script "FitProPlustoFitProUltrainitial.sql" which copies all the FP+ SQL server data into FPU SQL Server data. Note – the SQL Server script has comments in it that guide the DBA on how to point to the right locations, etc.
- 3. Start FPU
- 4. Give a name for the SQL Server DB, then type in the DB string (given by DBA) to connect to DB
 - a. Select the "Data Management" option

Active Datab	ase	
NAME (REQUIRED) SQL Server		
Database type		
O SQLITE		
MS SQL		
MS SQL CONNECTION ST	RING (REQUIRED)	
NOTES		
ENTER NOTES HER	E	

- b. Save the database information and "Save" it.
- 5. Exit FPU
- 6. Start FPU

a. Open the side menu and	make the SQL Server active
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Database List	- FILIER		
Name	Location	Active	Actions
Default Database	C:\Users\Public\Docur	ments\TSI\pc-804x-node\d	:
SQL Server	MS SQL	~	:
SQL Server Ultra	MS SQL		Edit
			 Details
			★ Export
			▲ Import
			i≣ Custom Fields
			= Protocols
			Delete
			🗸 Set Active

Note – These steps need to be performed for every computer that will connect to the instrument(s). These steps need to be performed per SQL Server FP+ DB that needs to be migrated to SQL Server FPU DB. If the DBs have some duplicate data between them, the SQL script (run by DBA) will prompt for "override" or "skip" for each duplicate. Steps above are one-time only, so long as customer moves forward to new data management approach of SQL Server and retires current data management approach. If at some point the customer switches to SQL Lite and creates SQL Lite FPU data which later need to be moved over to SQL Server FPU data, then they would need to repeat these instructions under Category 2.

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