

# Standardizing People Records including Custom Fields Manually or in Bulk



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## Summary

This describes the steps needed to standardize a People list to all instances of FitPro™ Ultra software running on separate computers across your organization when a shared database is not in place. If instances of FitPro™ Ultra software are connected to a centralized Microsoft® SQL Server® database, this will happen automatically through the shared database and these steps are not necessary.

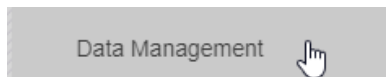
The process for standardizing a People list across instances of FitPro™ Ultra software is to configure any Custom Fields you would like to include in your People records, generate the People list, and import the Custom Fields and People lists into each instance of FitPro™ Ultra software.

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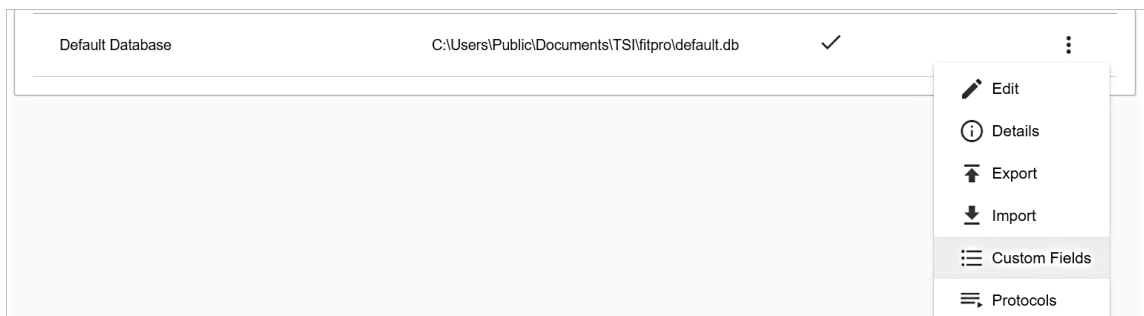
## Configure Custom Fields

Custom Fields allow additional information to be captured alongside each Person and their Fit Test History record. These fields could be used for additional demographic information such as Department, Supervisor, or email address, or they could be used to track other relevant information such as Medical Clearance Status.

1. To set up **Custom Fields**, select **Data Management** from the main menu.



2. Click the 3-dot menu for the database that you will be using and select **Custom Fields**.



3. *Company* and *Location* are default Custom Fields that can be formatted as desired, and additional Custom Fields (up to four additional fields) are available for use. Custom Fields can be formatted as Required or Optional and the field type can be a Drop-down or Text. Format the Custom Fields as desired and click **Save**.

The screenshot shows a 'Custom Fields' configuration window. The 'Email' field is expanded, showing its configuration: 'CUSTOM FIELD LABEL' is 'Email', 'FIELD TYPE' is 'Text', and the 'Required' toggle is turned on. Below the expanded field is a list of other custom fields: 'Clearance', 'Clear Date', 'Expiration', 'Company', and 'Location'. At the bottom are buttons for 'NEW CUSTOM FIELD', 'CANCEL', and 'SAVE'.

4. After Custom Fields are configured, they will appear when adding, editing, or assigning a person. The Custom Fields configuration should be standardized across computers as well by exporting as a CSV (Comma Separated Value) text file from the computer where they were configured and importing into all other computers.

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## Generate a Standardized People List

You can generate the standardized People list by exporting a pre-populated FitPro™ Ultra People database or by exporting an empty FitPro™ Ultra People database and transferring data to this file in bulk. To pre-populate the People database before exporting, you will manually add individual People records within FitPro™ Ultra software and then export that database. To populate the People database in bulk from an existing master list of employees requiring fit testing, you will export an empty People database and bulk transfer your data into it so it has the proper data format.

### Manual Creation of Standard People List

If you already have a computer with all People entered into the local FitPro Ultra database, then no further preparation is needed; the People records from that computer can be used as the standard list for exporting and sharing. Otherwise, you will need to create a set of People records that will be exported and then used as the imported database across computers.

To create the standard People list manually within FitPro™ Ultra software, do so by using the hamburger menu to go to the **People** menu and select *New* to add a new People record. Manually add each People record until you have the list you want you to use across all instances of FitPro™ Ultra software.

Once you have the standard People list created in FitPro™ Ultra software, you can export this database as a CSV (Comma Separated Value) text file. This is the file you will use in the next step to import into all other computers with FitPro Ultra to ensure standard People lists across computers.

## Bulk Creation of Standard People List

If you have an existing master list of employees requiring fit testing from another software or in an Excel® file, this can be used to populate your People list in FitPro Ultra software after it is transferred into a compatible data format. In order to get the data into the proper format, you will export a People database as a CSV (Comma Separated Value) text file template for the People list and copy the data from the master list into this template.

If you have configured Custom Fields, they will appear as generic headers “custom1Label” with “custom1Data” and so forth for the four additional Custom Fields (after Company and Location). You may need to confirm the order and configuration of your Custom Fields so you can enter the data in the proper columns and with the proper data options you’ve created for drop-down field types.

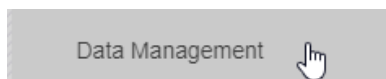
Browse to the location where the exported file was saved and open the file. If there were already People records in the exported People database, they will be populated in this file. Transfer the bulk data into the exported file so it has the correct data formatting, retaining or deleting any People data that was already in the database so you have a refined standardize People list. This is the file you will use in the next step to import into all other computers with FitPro Ultra software to ensure standard People lists across computers.

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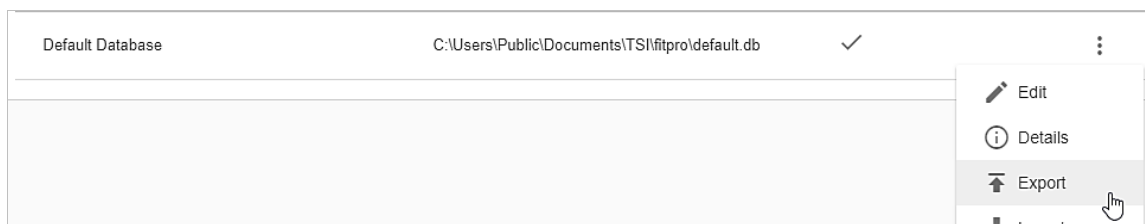
## Export Database as CSV Text File

To standardized Custom Fields and People lists, you will import those databases as CSV text files across computers as the final step. But first you must export the relevant database as a CSV text file.

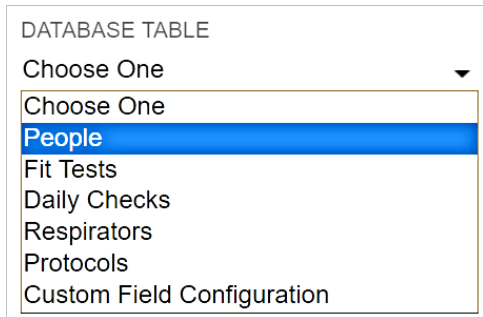
1. To export the database, select **Data Management** from the main menu.



2. Click the 3-dot menu for the database that you are using and select **Export**.



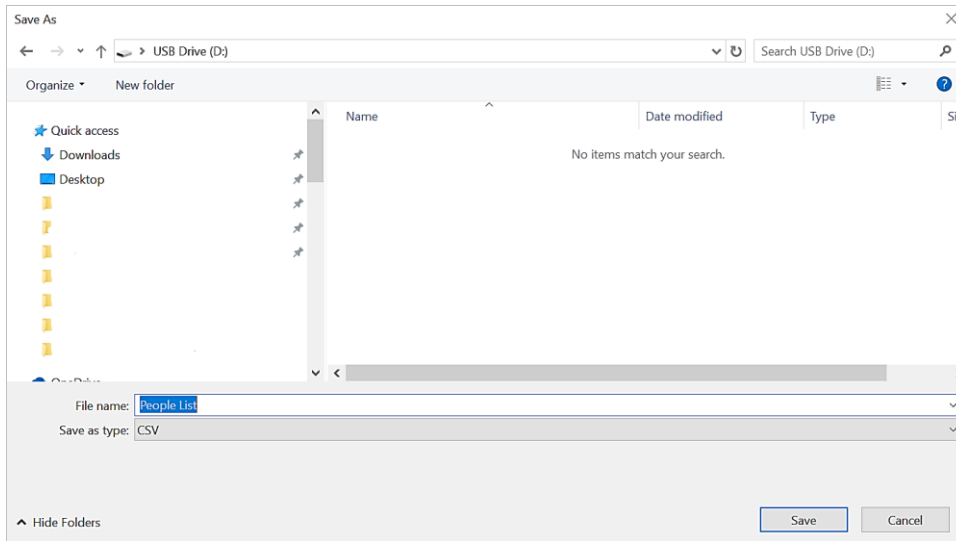
3. The Export dialog will appear. Under **Database Table** select **Custom Fields Configuration** or **People**.



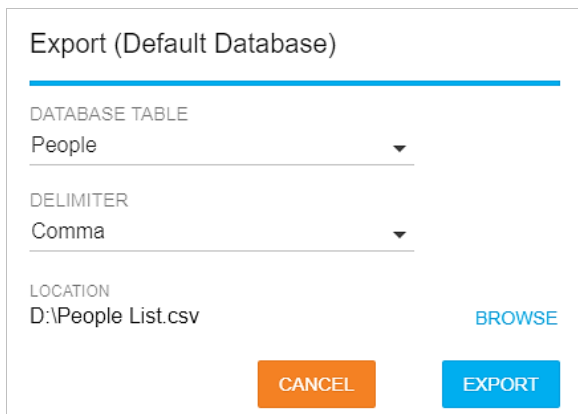
4. To set the file location and name, select **Browse**.



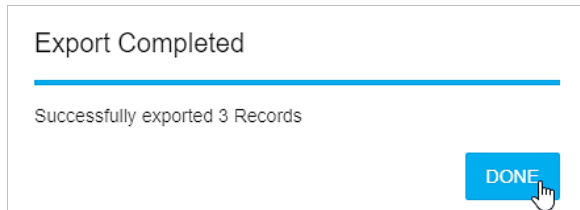
5. A file selection dialog will open. Browse to the folder where you want to save the file, enter a name for the file and click **Save**:



6. The chosen path will appear in on the **Export Dialog**. Click **Export**.



7. Once the export operation is complete, click **Done**.



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## Share the Standardized Database as a CSV Text File

The next step is to distribute the exported database as a CSV text file to other FitPro™ Ultra computers within your organization. That can be done using whatever file sharing tools you have including via email attachment, shared network folders, thumb drive, etc.

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## Prepare the Receiving Computer for CSV Text File Import

If there are Custom Fields configured on a receiving computer, they will be overwritten when you import the standardized Custom Fields database as a CSV text file.

It is likely that a receiving computer may already have some People populated in its database. If those records are not part of the standard People list, they should be deleted before importing the standard People list. If there are duplicate records, they will be automatically overwritten upon importing the standard People list as long as the “Overwrite duplicate records in destination” field is checked. A duplicate record is one that has the exact same combination of First Name, Last Name, and ID Number.

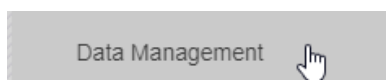
To delete records that are no longer relevant prior to importing, you can do so manually within FitPro™ Ultra software by using the hamburger menu to go to the **People** menu and select the trash icon next to a People record you would like to delete. If there are a prohibitively large number of People records to delete manually, it is advised to add a New Database by selecting **Data Management** from the main menu and clicking **New**. For a new database, you will need to configure Custom Fields, import or manually add Respirators, and configure any other customizations you would like (set Protocol and Database settings).

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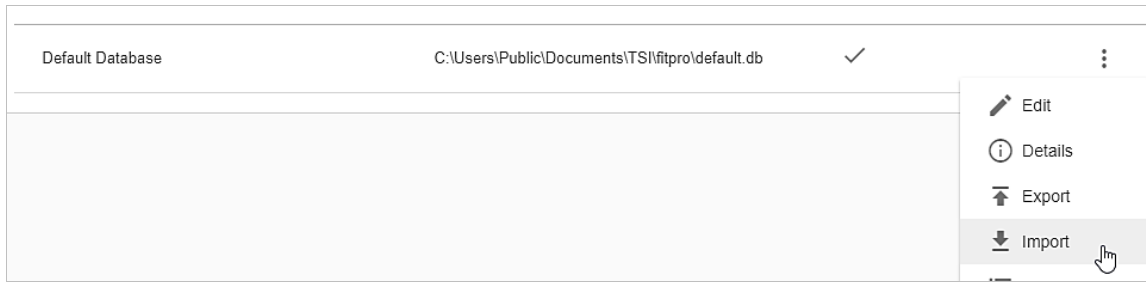
## Importing the Standardized Database as a CSV Text File

Once computers are prepared for receiving the standardized Custom Fields and People databases as CSV text files, they can be imported. The process for importing is very similar to the process used for export.

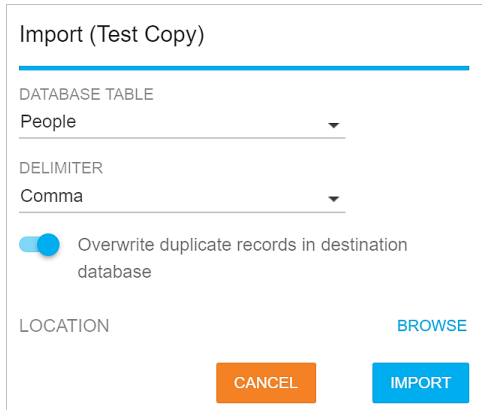
1. Select **Data Management** from the main menu.



2. Click the 3-dot menu for the database you want to import into and select **Import**:



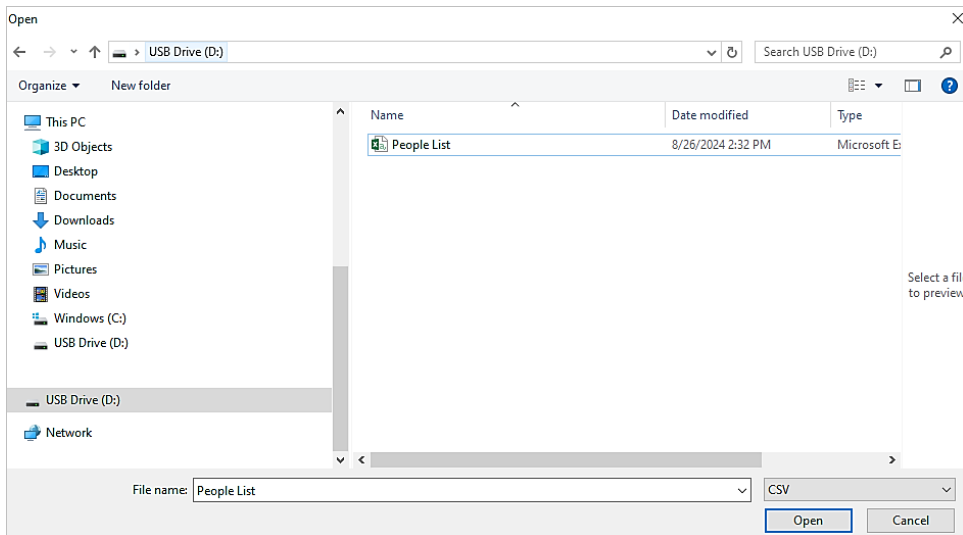
3. On the **Import** dialog, for **Database Table**, select **Custom Fields** or **People**.



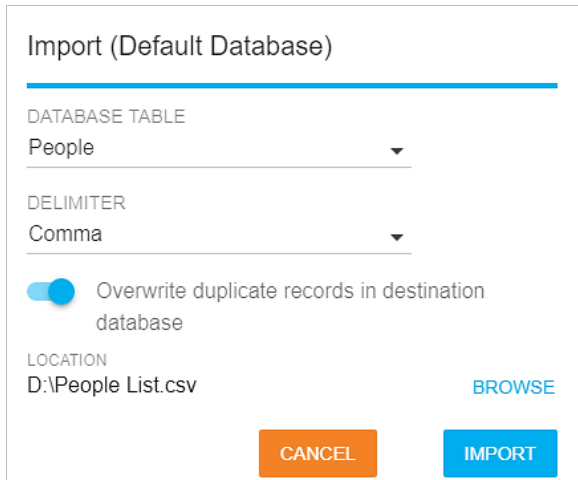
4. To select the file to import, select **Browse**.



5. In the file open dialog, browse to the file exported in the previous steps, select it and click **Open**.



6. On the **Import** dialog, click **Import** to begin the import process.



Import (Default Database)

DATABASE TABLE  
People

DELIMITER  
Comma

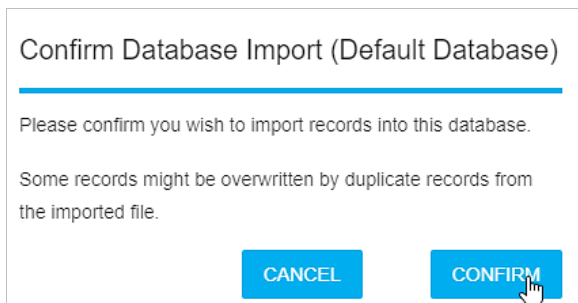
Overwrite duplicate records in destination database

LOCATION  
D:\People List.csv

BROWSE

CANCEL IMPORT

7. A **confirmation** prompt will appear reminding that some records may be overwritten by duplicate records from the imported file. Click **Confirm**.



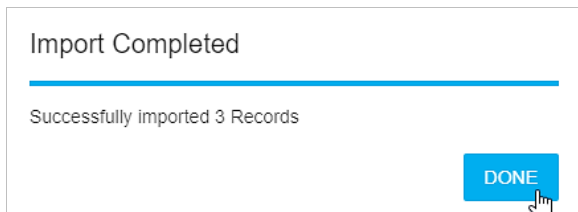
Confirm Database Import (Default Database)

Please confirm you wish to import records into this database.

Some records might be overwritten by duplicate records from the imported file.

CANCEL CONFIRM

8. When the **import** is complete, click **Done**.



Import Completed

Successfully imported 3 Records

DONE

9. The imported **Custom Fields** or **People** list should now be available for use on the importing computer. Repeat this process for all other computers.

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