How To: Save and Automate Report
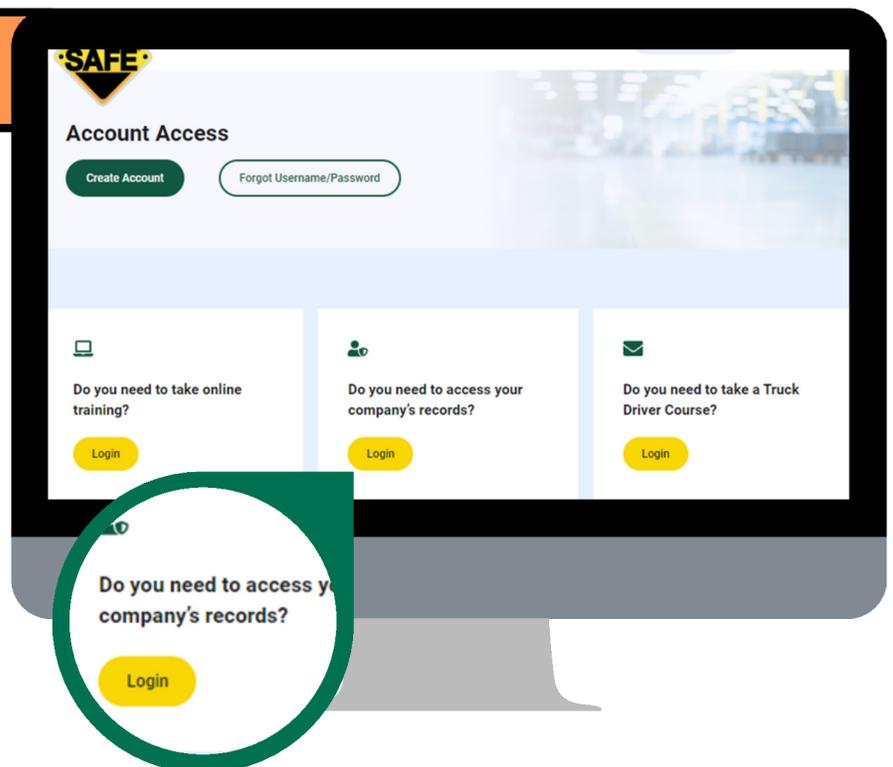
Go to the TAPPISAFE website www.tappisafe.org

STEP 1
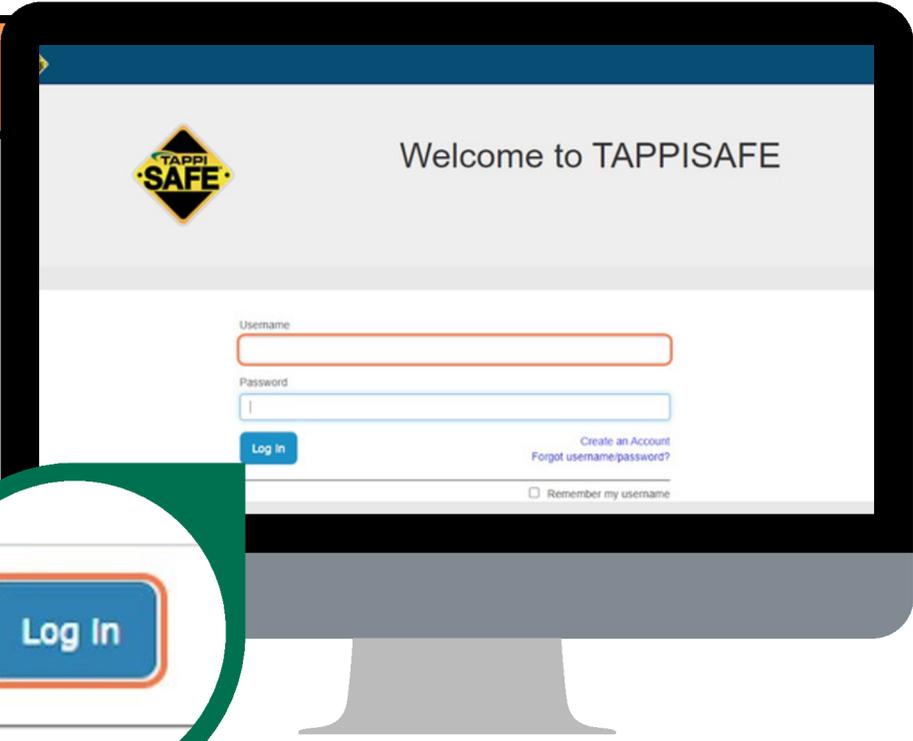## Click on Login

Login

A Standardized Approach to Safety for the Pulp and Paper Industry

TAPPISAFE is the first industry-recognized safety orientation and verification program for the pulp, paper, tissue, packaging and converting industries.

View Courses   Create Account

More than 120 facilities and 20,000 contractors and suppliers are currently enrolled
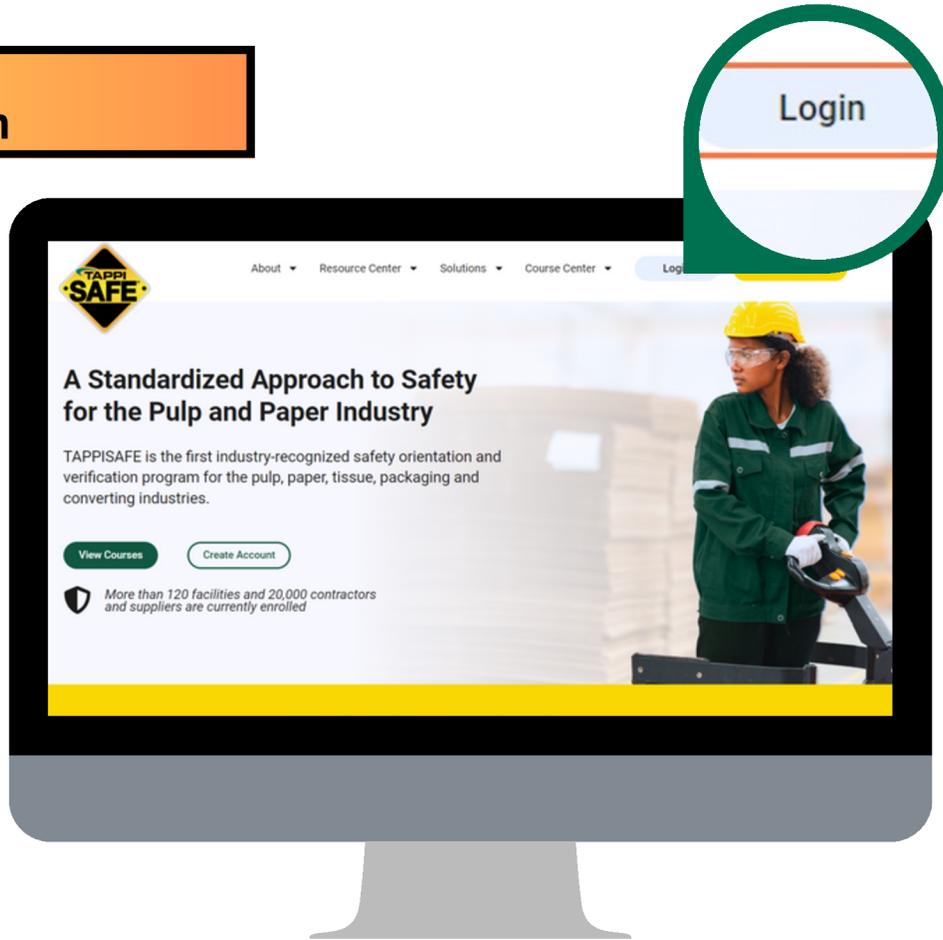
STEP 2
Click on Access Database

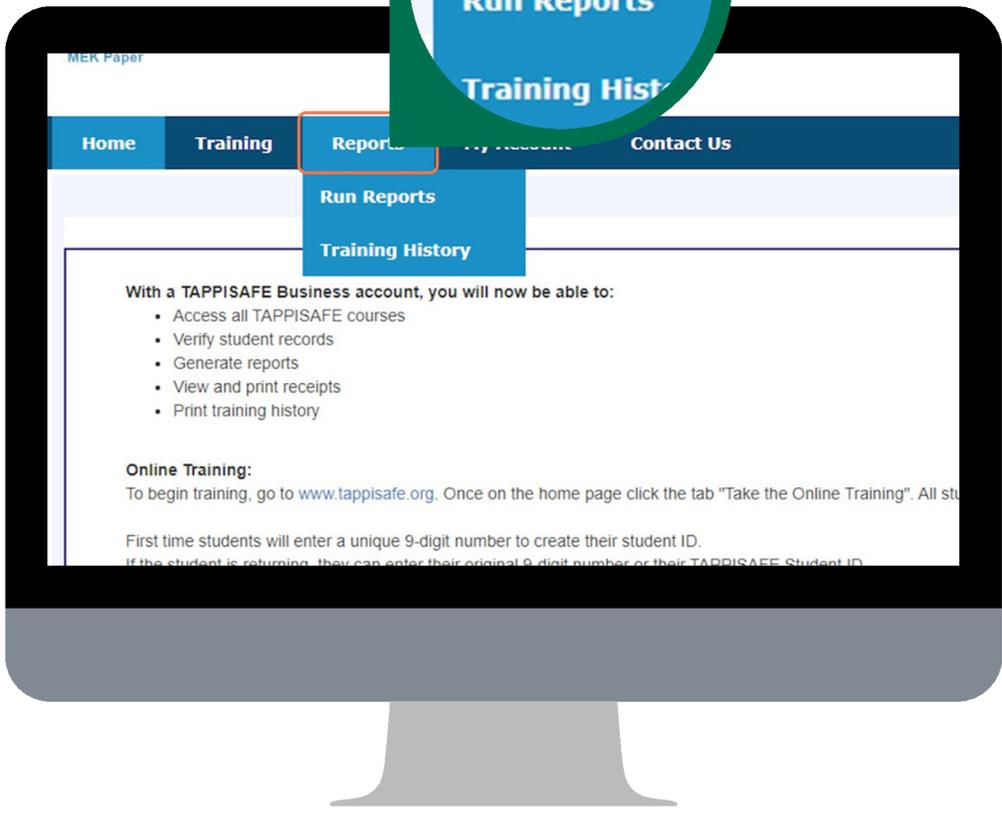**Are you a company admin? Select the Login button to run reports and verify records**

Account Access

Create Account   Forgot Username/Password

Do you need to take online training?

Login

Do you need to access your company's records?

Login

Do you need to take a Truck Driver Course?

Login

Do you need to access your company's records?

Login

Enter login credentials

Welcome to TAPPISAFE

Username

Password

Log In

Create an Account
Forgot username/password?

☐ Remember my username

Log In

Reports

Run Reports

Training Hist

MEK Paper

| Home | Training | Reports | My Account | Contact Us |

Run Reports

Training History

With a TAPPISAFE Business account, you will now be able to:
- Access all TAPPISAFE courses
- Verify student records
- Generate reports
- View and print receipts
- Print training history

Online Training:
To begin training, go to www.tappisafe.org. Once on the home page click the tab "Take the Online Training". All stu

First time students will enter a unique 9-digit number to create their student ID.
If the student is returning, they can enter their original 9-digit number or their TAPPISAFE Student ID

Select the report you want
to run
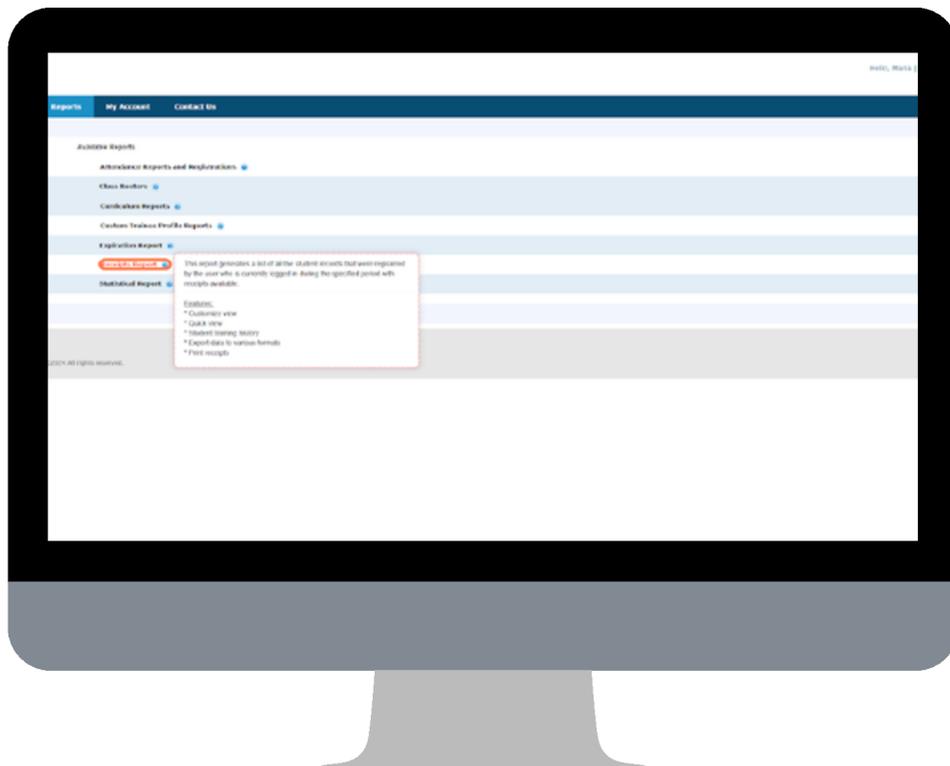
- **Enter your report parameters**
- **Generate report**
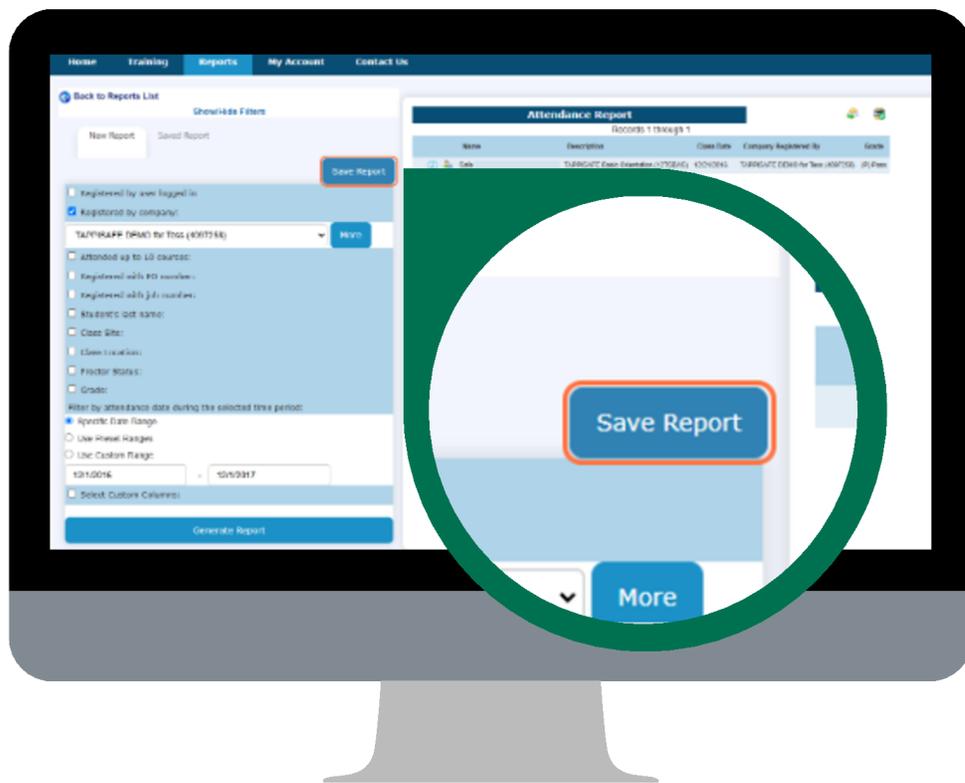
Click Save Report to save the report that you generated
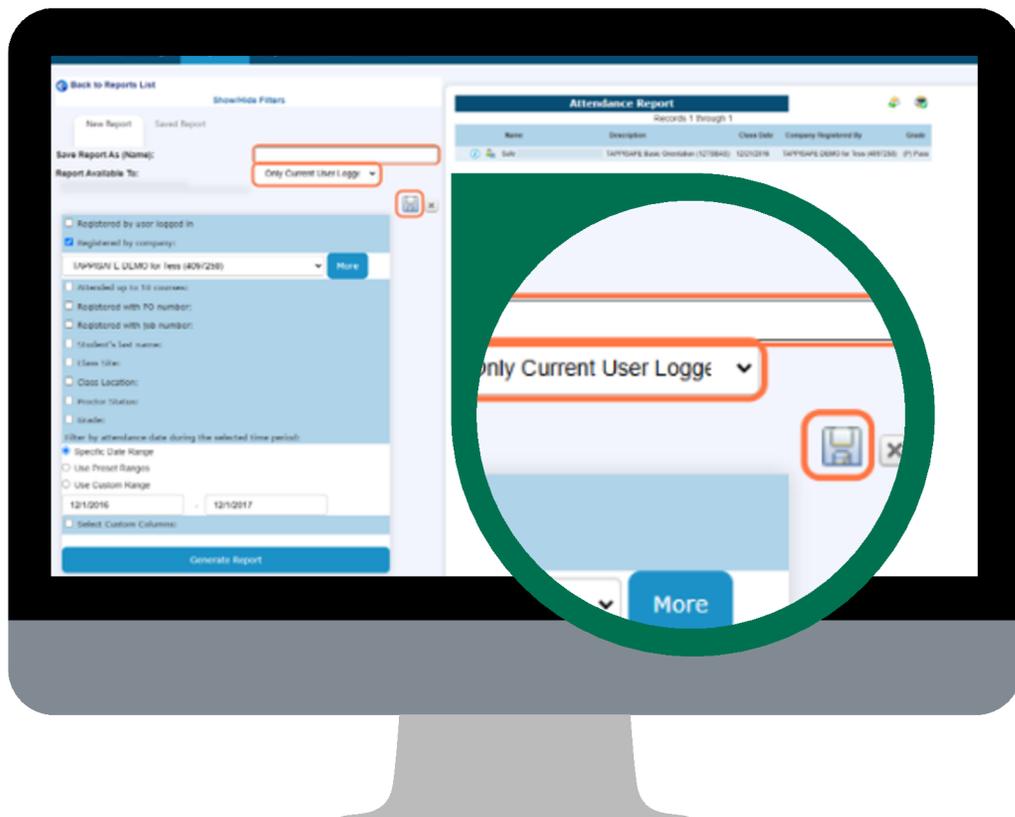
- **Enter the Name of your new save report**
- **Select from the drop-down menu of who you would like the report available to**
- **Click the Floppy Disk icon to save the report**

STEP 10
Click Saved Report

Saved Report

(Report)

Home   Training   Reports   My Account

Back to Reports List

Show/Hide Filters

New Report   Saved Report

(Select Report)   View Saved Report

Filters:
Select the report from above and click 'View Selected Report'.
You will be presented with options to edit, delete, and schedule the report to be emailed.

How can a report be scheduled to be emailed?

1) Click the 'View Selected Report' button to run the report
2) Click the calendar icon to schedule the report

- **Click Saved Report to view your saved reports**
- **Click the drop-down menu and select the needed report**
- **Click View Saved Report**

STEP 11
Edit and Automate Saved Reports

Edit Report: Select the Blue icon to edit the report

Delete Report: Select the Red icon to delete the report

**Schedule Report: Select the Calendar icon to schedule and automate the report**

Home   Training   Reports   My

Back to Reports List

Show/Hide Filters

New Report   Saved Report

Test Report   View Saved Report

Filters:
Select the report from above and click 'View Selected Report'.
You will be presented with options to edit, delete, and schedule the report to be emailed.

How can a report be scheduled to be emailed?

1) Click the 'View Selected Report' button to run the report
2) Click the calendar icon to schedule the report

Show Menu

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Attendance Report

Records 1 through 1

Name   Description

Safe   TAPPISAFE Basic Orientation (UTTSSAS)

- **Select Email Standard Report**
- **Click the Attachment Type drop-down menu and select file type**
- **Click the box if you would still the like the report to be sent if there is no data**
- **Click the green button to add email addresses**
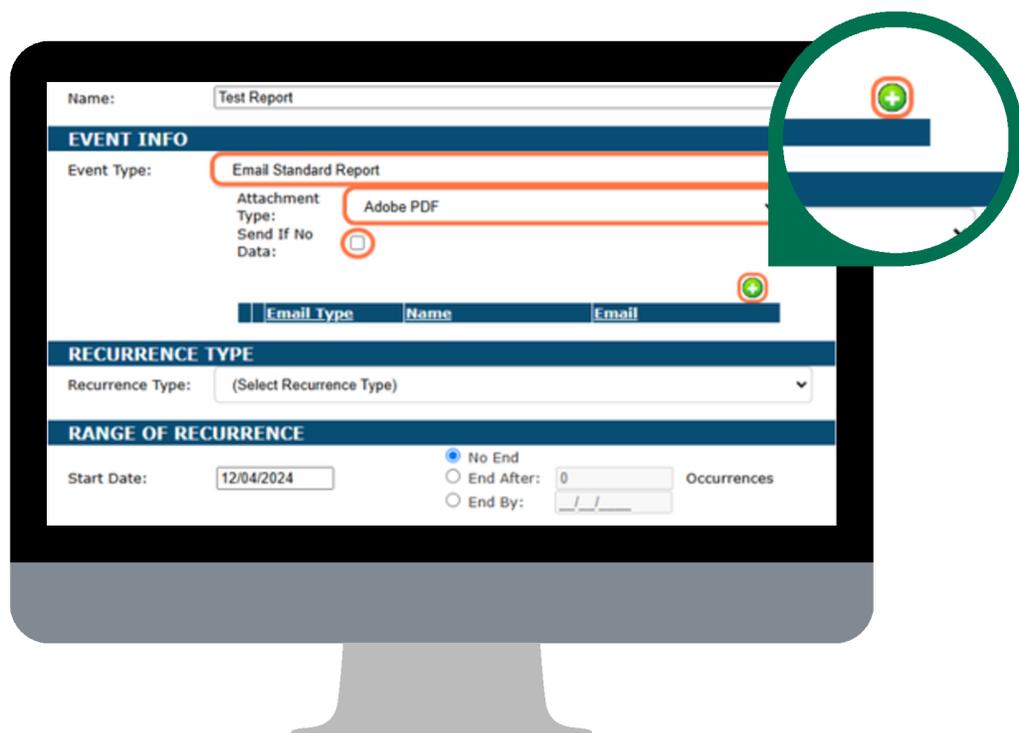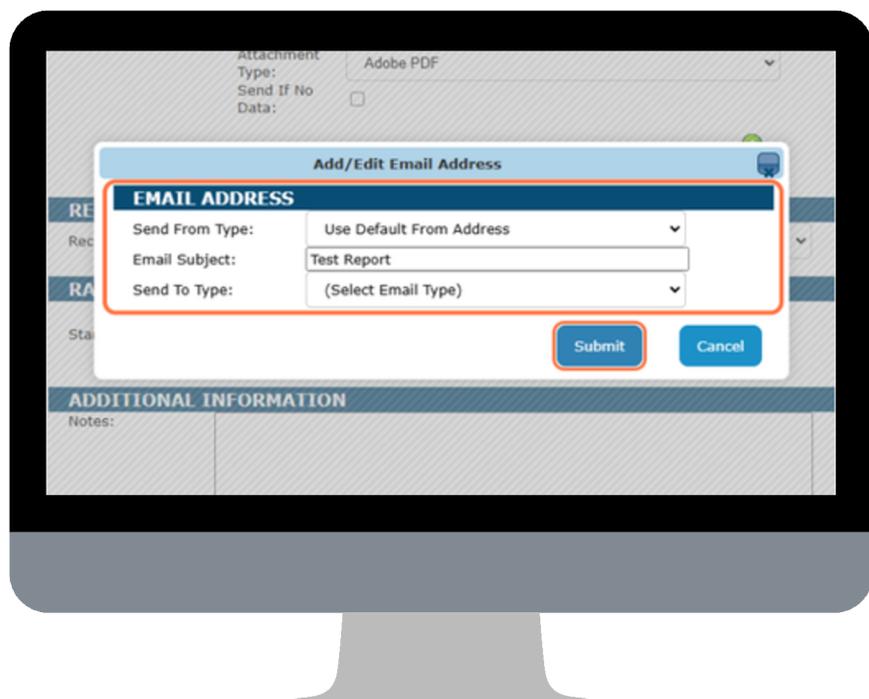
- **Select Send From Type:**
  - **Use Default From Address: Select this for the email address saved on file**
  - **Use Custom From Address: Select this to enter a custom address**
- **Select Send To Type:**
  - **Custom Email: Select this to enter a custom address**
  - **Login Account Email: Select this for the email address saved on file**
- **Click Submit**

- **Select from the Recurrence Type drop-down menu of how often you would like the report automatically sent (Hourly, Daily, Weekly, Monthly, Yearly)**
- **Select the Start Date and End Date (No End, End After, End By)**
- **Enter any additional notes to include in automated report**
- **Click Submit**

RECURRENCE TYPE

Recurrence Type: Hourly

Run every 3 Hour(s)

RANGE OF RECURRENCE

Start Date: 12/04/2024

○ No End
○ End After: 0 Occurrences
○ End By: __/__/____

ADDITIONAL INFORMATION

Notes:

Submit   Cancel