Tool for RSR Export (T-REX) User's Guide

For the Ryan White Services Client-Level Data Report Version 3.3

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Release History

Version	Date	Description
1.1	August 2009	T-REX
1.11	August 2009	Client Services error fixed. Drop down lists added to RsrClients Access database.
1.14	August 2009	Client URN column added to the ClientReport Table.
2.0	December 2009	Support for SQL Server added.
3.0	September 2010	Additional directions re: extracting zip files and data validation queries added. Appendix A: XML/Access import.
3.1	March 2011	Directions: Added, moved, and simplified information, with emphasis on the extraction and XML creation processes. Added section on removing Access passwords.
3.2	April 2011	Updated section 2A Import XML directions to use RsrClientImport.mdb instead of starting with a blank database.
3.3	January 2012	Added section on merging duplicate records, and updated instructions to include reporting year validation.

1. About the Tool for RSR Export (T-REX)

The Ryan White Services Reporting System (RSR) requires that grantees and providers submit de-identified client-level demographic, service, and clinical data. Rather than filling out a client-level report for the RSR, the client-level data are provided as an electronic file, with a record for each client. You must upload these data to the HAB server in a specific XML (eXtensible Markup Language) format. XML is a simple and widely adopted method of formatting data so that it can be exchanged across different computer platforms, languages, and applications.

T-REX: Definition

"T-REX" is a Tool for RSR Export created to assist grantees currently not using CAREWare, a Provider Data Import (PDI), or other RSR-compliant vendors in the conversion of their Client-Level Data into an XML Format.

Purposes

The primary purposes of the Tool for RSR Export (T-REX) are to:

- 1. Convert your Client-Level Data into XML format that meets the requirements for the RSR.
- 2. Serve as a template for you to develop your own data extraction and/or XML conversion tools.
- 3. Take your RSR XML file import and translate it for viewing in the Access Tables

About the User Manual

This user manual is specifically for grantees seeking to convert their Client-Level Data into XML format for submittal to HAB, and assumes that the grantee staff person(s) using *T-REX* are familiar with or have facility with the following software, including accessing and modifying files:

- Microsoft Access or Microsoft SQL Server
- Microsoft Excel

This user manual is not written for programmers and assumes that programmers using T-REX are equipped and prepared to modify the files to fit their needs, without the aid of a user manual.

As an option, this user manual also provides instructions for users who use SQL Server.

Other Resources/ Documents

The following documents are available for Grantee reference and use during the RSR reporting process, from data collection to data reporting.

- <u>RSR Client-Level Data Elements:</u> This document should be used in conjunction with the RSR Client-Level Data Elements document, which describes the rationale for collecting the client-level data elements. The RSR Client-Level Data Elements document is available at <u>http://careacttarget.org/library/rsr/datafields.pdf</u>
- <u>RSR Instructions:</u> The RSR Instructions document contains detailed information needed for completing the RSR reports. This document may be cross-referenced with the section, Client-Level Data Fields, in the RSR Instructions document. The RSR

Instructions document is available at http://careacttarget.org/library/RSR_Instruction_Manual.pdf

- The Instruction Manual Supplement is available at: <u>http://careacttarget.org/library/RSR-Supplement_color_11-11-09_%28508%20compliant%29.pdf</u>
- <u>RSR CLD Dictionary and XML Schema Implementation Guide</u> RSR Client-Level Data Dictionary, Version 2.0 http://careacttarget.org/library/RSR Client Level Data Dictionary.pdf.

2. System Requirements

To run *T-REX*, you will need the following programs:

- Windows XP or higher
- An archiving tool such as WinZip or 7-zip to extract the .zip files (free):
 - Note: If you have Windows 7 or Window Vista, you don't need this.
 - WinZip: http://download.winzip.com/winzip150.exe
 - o 7-Zip: http://downloads.sourceforge.net/sevenzip/7z920.exe
- Microsoft .Net 2.0 Framework. Available free at <u>http://www.microsoft.com/downloads/details.aspx?FamilyID=0856EACB-4362-4B0D-8EDD-AAB15C5E04F5&displaylang=en</u>

The following is applicable to programmers only:

To modify or debug *T-REX*, you will need **Microsoft Visual Studio 2008** or **Microsoft Visual Basic 2008 Express Edition**. Microsoft Visual Studio 2008 Express Edition can be downloaded for free from http://www.microsoft.com/exPress/download/. The file you need to open with Microsoft Visual Studio is called "**RsrXmlGenerator.sln**".

3. Installing T-REX

<u>Note</u>

As you update your Client-Level Data frequently, you will need to follow the steps below **each time** you wish to upload a **new set** of Client-Level Data for reporting. The steps describe how to import data into the provided Access files for XML conversion.

Each time prior to importing data into the Access file, you must **rename and save** the file on your computer or server. Detailed instructions are provided below. The Access files **are not** saved to HAB's servers. As such, HAB cannot retrieve these files for you if you lose them.

• You will receive the T-REX files as a zip file from either a technical assistance representative via email or via an FTP site (a File Transfer Protocol site, where you log in and download the zip file) depending on what your system allows. A zip file is a compressed file that contains multiple files within it.

- When you receive/download the RrsFiles.zip, double click on the file to open it and then locate and open the **T-RexFiles.zip** file.
- For Windows 7 or Vista Users: If you have Winzip (you would see the screen below), continue with the directions normally. If the .zip file appears to open in a normal folder window, it is actually still a compressed file. Copy (drag & drop) all of these files to C:\T-RexFiles and skip to Step 4.

WinZip File Actions	Pro - Rsr View Jol	Files.zip	Help	_					_		_		_
New	Open	Favorites	Real	Extract	Encrypt	Solution View	CheckO	ut Wizard	View	style			
Name 🔺						Туре	1	Modified		Size	Ratio	Packed	Path
TRSR 2009	Annual Rep	orting Period >	KML Schema	Definition Re	lease Notes.pdf	Adobe	Acro	12/3/2009 8:3	94 PM	35,116	41%	20,637	
TRSR CLD X	ML MS Acce	ss 2003 Impo	rt Instruction	is.pdf		Adobe	Acro	2/26/2010 10:	44 PM	399,432	11%	356,309	
TRSR CLD X	ML MS Acce	ess 2007 Impo	rt Instruction	ns.pdf		Adobe	Acro	2/26/2010 10:	44 PM	405,107	10%	363,823	
🔁 RSR Data I	Dictionary V	ersion 2.3 09-	JUN-2010.p	f		Adobe	Acro	6/9/2010 12:2	6 PM	291,228	21%	229,673	
🔊 RsrClientXi	mlToMicroso	ftAccessMap.	xslt			XSLT Fi	e	2/19/2010 2:1	7 PM	16,882	87%	2,201	
RsrXmlGen	erator.zip					WinZip	File	9/10/2010 1:1	0 PM	4,510,567	23%	3,482,	
RsrXmlSch	emaProduct	ion.zip				WinZip	File	6/30/2010 10:	52 AM	17,598	6%	16,514	

• Extract the zip files into the location of your choice. Ensure that no files are selected, or Winzip will try to export only those files.

Note: The archive will automatically extract to a 'T-RexFiles' folder. We recommend that you extract to the C:\ Drive.

🖳 WinZip Pro - RsrXmlGenerator.zip 📃 🗖 🔀											X		
File	Actions	View	Jobs	Options	Help								
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🛛 🛃 R	srGeneric	Sche	XSD	File	3/1/2010 4	1:54 PM	6,324	79%	1,300	T-Rex	Files\Applic	ation Files\	
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2 P	srClients9	iamnl	Micro	nsoft Of	3/1/2011 6	5:08 PM	14.864	98%	333.810	T-Rex	Files'ı		

• When the Extract window appears, ensure that the following options are checked and that you have entered the correct path into 'Extract to'. Then, click **Extract**.

Extract - C:\Doc	uments and Settings\ContiniJWy Documents\Downloads\RsrXmlGe	ener 🔀
Extract to:	C/	🔊 🖻
Desktop My Documents	My Computer J3½ Floppy (A:) Local Disk (C:) DVD-RW Drive (D:) Continil on 'CAMFILESRV02.corp.abtassoc.com\Users\$' (G:) Common on 'camfile01.corp.abtassoc.com\cam1-vol3' (H:) DVD: White on 'Camfile01.corp.abtassoc.com\cam1-vol3' (X:) Common on 'camfile01.corp.abtassoc.com\cam1-vol3' (X:) Common on 'camfile01.corp.abtassoc.com\cam1-vol3' (X:) Common on 'camfile01.corp.abtassoc.com\cam1-vol3' (Z:)	
My Computer My Network Places	Files	Extract Cancel Help

• If you are asked for a password, the password is **12345678**. This password is not for security purposes, but to prevent email spam filters from altering the zip file.

WinZip - Password for file: RsrXmlGenerator.zip								
Note: the password will be applied to files you subsequently add to or extract from the current archive, and will be automatically cleared when the archive is closed.								
Enter password:								
12345678								
□ <u>M</u> ask password								
OK Cancel <u>H</u> elp								

• Once extraction is completed, you should see the folder window appear with your C:\ Drive. Double-click the T-RexFiles folder to open it. You can create a shortcut to this folder by right clicking and selecting Send to->Desktop (shortcut) for later easy access.

🚞 Program Files	File Folder
T-RexFiles	File Folder
C WINDOWS	File Folder

• Note: If all you see is a T-RexFiles folder, double-click that and continue the instructions as normal.

• The folder contents should appear as they do in the screenshot below.

Note: Your computer may not be set to show extensions, so you may see only '**RsrClients**' instead of '**RsrClients.mdb**'. This is not a problem and you can continue normally.

C:\T-RexFiles			_ 🗆 🔀								
File Edit View Favorites T	ools Help										
🚱 Back 🔹 📀 🕤 🏂 Search 🎼 Folders 🕼 🎲 🗙 🌱 🛄 🔭											
Address 🛅 C:\T-RexFiles 💽 🕞 Go											
Name 🔺	Size	Туре	Date Modified								
C Application Files		File Folder	3/3/2011 10:18 AM								
🛅 Source Code		File Folder	3/3/2011 10:18 AM								
Construction Scripts		File Folder	3/3/2011 10:18 AM								
ClientReportSample.xls	77 KB	Microsoft Excel 97	3/1/2011 5:55 PM								
ClientReportTemplate.xls	3,322 KB	1/5/2011 7:41 PM									
RsrClients.mdb	14,516 KB	Microsoft Office Acc	3/1/2011 6:08 PM								
RsrClientsSample.mdb	14,516 KB	Microsoft Office Acc	3/1/2011 6:08 PM								
RsrClientXmlToMicrosoftAcces	17 KB	XSL Transformation	2/19/2010 1:17 PM								
T-REX Application	2 KB	Shortcut	3/1/2011 6:27 PM								
T-Rex User Manual V2.0.pdf	313 KB	Adobe Acrobat Doc	2/12/2010 8:14 AM								
10 objects		31.9 MB 🛛 😼	My Computer								

• The file that we will be copying the data from Excel into is the **RsrClients.mdb** file, which is a Microsoft Access database. Double-click it to open Access, and continue with the instructions in Step 4.

4. Loading the MS Access Database

There are multiple ways to import data. For those who are not familiar with Access programming, the following instructions present a **basic approach** for grantees working with Client-Level Data from any spreadsheet.

- We are providing instructions for both Access 2003 and Access 2007.
- To complete the following steps, you will need your source datasheet which should be in Excel.

This approach involves exporting the RSR-required data elements from your system into an Excel spreadsheet and then copying and pasting the data from the Excel spreadsheet into the T-REX Access tables.

The sheet names in Excel should match up with the Access Table names that you will see in the instructions below.

Those who are familiar with Access programming may choose to create scripts to extract data from their current database into the correct categories in an access database. Creating Access scripts is not covered in this manual.

You must refer to the data dictionary as you go along to ensure you are loading the correct information. The data dictionary is located here: http://careacttarget.org/library/RSR Client Level Data Dictionary.pdf.

To load the database, double-click file name **RsrClients.mdb** in the T-RexFiles folder. This will open Microsoft Access. Then, follow the steps on the next page.

Note: If your database is password protected, remove the password by following the steps in Section 11 before continuing.

1) Back up the database by clicking:

File > Back Up Database (Access 2003)

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ĺ	2	Open				Ctrl+	0					
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l		Save <u>A</u>	s									
		Bac <u>k</u> Up	o Datab	ase								

File > Manage > Back Up Database (Access 2007)



 Save the copy to the location of your choice. We suggest keeping all your copies in a single location. Note that the automatically produced file name will contain the date of the backup. This will help you identify datasets in the future.

Save Backu	p As	×
Save <u>i</u> n	n: 😼 My Computer 💽 🎯 🕶 🚺 🔯 🗙 🚞 🎹 🕶 Tools 🕶	
My Recen Document	3½ Floppy (A:) Local Disk (C:) DVD-RW Drive (D:) Sys on 'Dur2' (F:) Nguyenhm on 'Dur1\Vol2\Personal' (G:) Common on 'Dur1\Vol2' (H:) Vol3 on 'Cam2' (K:)	
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My Comput	ter	
My Netwo Places	rk File <u>name</u> : <u>RsrClients_2009-07-28.mdb</u> <u>Save</u> Save as <u>type</u> : Microsoft Office Access Database (*.mdb) <u>Canc</u>	e :el

3) Once the backup copy has been saved, go back to the folder window and double-click the new file with today's date to open that copy. This way, you will be working with the backup, leaving the original intact. 4) You will see a list of compiled Client-Level Data tables:



5) Double-clicking on a table name will show you the contents of the table:

ClientReport : Table								
	ID	ClientFirstName	ClientLastName	ClientBirthDate	ClientUci	ClientUrn		
		-		12010543				
Record:		1 🕨 🚺	▶ * of 1	<	III	>		

- 6) The table contains elements and values.
 - **Elements**, as shown above, are variables that categorize the data you will submit. • They appear in gray in the first row. In this example, the elements are ID, ReportPeriodID, ClientFirstName, etc.
 - Values refers to the data you input into each element or variable. For example, for • element "ClientFirstName", you can input the value "John" or "Jane". Each element can have multiple values. In some cases, the Data Dictionary specifies the structure of the values. An example is noted regarding the client services delivered table. You will find more information in Section 10.

For more information on data elements and values, visit the data academy and review the module "Getting Data from Existing Sources" at: http://www.careacttarget.org/dataacademy/

Access 2007

- 7) You will input values into the elements. You will cut and paste the values from your source spreadsheet into the table. Before you can copy and paste the values, make sure that the first row of the spreadsheet, the elements, matches the order of the first row of the Access table.
- 8) Select all sells by pressing CTRL+A (Select All) or by clicking the upper-left square in Excel.

ЪП		А	В	С	D	E		
7	1	ID	ClientFirstName	ClientLastName	ClientBirthDate	ClientUci	CI	
	2	255884	Nöël	Oslo	12/7/1976			
	3	255885	Noel	Oslo	12/7/1976			
	4	256068	Mária	Jíménez	1/1/2001			~
	14 A	► ► \C	l ientReport / Clier	ntReportAmbulatorySe	ervice / ClientRepo	rtCD4Te 🔇 📖	>	

- 9) In Excel, copy your source spreadsheet pressing CTRL+C or going to Edit>Copy.
- 10) Now on the Access table, click on the square in the upper-left corner below the menu bars to highlight the entire page:

2 M	icrosoft	Access	- [ClientRe	eport : T	able]									_	
: 📰	<u>File E</u> o	lit <u>V</u> iev	v <u>I</u> nsert	F <u>o</u> rmat	t <u>R</u> ecords	<u>T</u> ools	<u>W</u> indow	Help Adob	e PDF			Type a	a question for help	-	.8×
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	ID		ReportPe	riodID	ClientFirst	Name (ClientLastNa	ame Client	BirthDate	ClientUci	Provid	lerID	FirstServiceDat	Rece	eived 🔺
															-
Reco	ord: 📕	< _	1 🕨)	• of 70		•								•
Data	asheet Vie	W											NUM		/

11) **Paste** the data (CTRL+V or Edit>Paste) into the table.

- 12) Data is automatically saved in the Access database when it is entered (Click Yes to continue with the paste operations pop-ups if any).
- 13) Repeat this process for each of the 9 ClientReport tables. These are the table names:
 - ClientReport
 ClientReportAmbulatoryService
 ClientReportCD4Test
 ClientReportHivRiskFactor
 ClientReportMedicalInsurance
 ClientReportRace
 ClientReportServiceDelivered
 ClientReportServiceVisits
 ClientReportViralLoadTest
- Note: For the ClientReportServicesDelivered table, indicate whether a service was delivered with the following values in the column or element called *DeliveredID*:
 - 1 = Service Not Delivered
 - 2 = Service Delivered
 - 3 = Unknown

If you enter only delivered services into **ClientReportServicesDelivered**, you must still enter in a value of "2" (e.g. Service Delivered) in the *DeliveredID* column or element. If you do not do so, the service will not be recognized as delivered.

• Once you have completed the cut and paste process for your Client-Level Data, you will then begin converting the data into XML format for submittal to HAB.

5. Validating Data

The following three queries were created within Access to search for inconsistent and missing data:

- Check First Service Dates
- Check First Service Dates Against Services
- Missing Values

Access 2003



Access 2007

Home Create E Home Create E View Paste Format Pain Views Clipboard	ternal Data D B Z U	Vie Vie	Home Paste ws	Create Exten Create Exten Cut Cut Format Painter Clipboard	mal Data C B I U
Vables Navigate To Category Custom Qbject Type Jables and Related Views Greated Date Modified Date Filter By Group Y Tagles	ce ce	ବ୍ୟ 1 8 8 8	CheckFirstS CheckFirstS Missing Val	erviceDates erviceDatesAgainstS ues	ervices
Queries Eorms Reports All Access Objects	tup				

• Double-clicking on the query name will show you the contents of each query.

CheckFirstServiceDates: The purpose of this query is to ensure that the ambulatory service was provided AFTER the client's first service date.

Ø	T-REX RSR Client-Level Data XML Generator - [CheckFirstServiceDates : Select Query]									
1	📃 Eile Edit	View Insert Format	<u>R</u> ecords <u>T</u> ools <u>W</u> indow <u>H</u> elp							
1	🔟 🕂 📓 🔁 🖸 🕾 🖄 🖾 🖄 🔊 🔍 🔄 🔄 🖓 🏹 🦅 🏹 🖓 🐴 V 🛤 🕅 🖓 🖬 🖓 👘 📄									
r	ID	ClientUrn	ClientUci	ClientFirstName	ClientLastName	FirstServiceDate	ServiceDate			
	255885		64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Noel	Oslo	12/31/2010	1/1/2008			
	255885		64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Noel	Oslo	12/31/2010	2/1/2008			

- The query compares the "ServiceDate" value in the ClientReportAmbulatoryService table to the "FirstServiceDate" value in the ClientReport table.
- Review and edit the values in these two tables as required and re-run query to ensure accuracy of the data.

CheckFirstServiceDatesAgainstServices: The purpose of this query is to ensure that services were provided AFTER the client's first service date. Please note the corresponding dates for "QuarterID" values: 1 = 3/31/09, 2 = 6/30/09, 3 = 9/30/09, 4 = 12/31/09.

2	T-REX RSR Client-Level Data XML Generator - [CheckFirstServiceDatesAgainstServices : Union Query]							
:0	Eile Edit Viev	v Insert Formal	: <u>R</u> ecords <u>I</u> ools	<u>W</u> indow <u>H</u> elp				
; 9	i sou • 🖬 🖏 🎿 🙇 🌮 ½ 📭 🖭 🔊 🛞 🏄 🏹 🦻 🦅 🏤 >> >>> 🛅 🚈 • @ 💂							
	ID	ClientUrn	ClientUci	ClientFirstName	ClientLastName	FirstServiceDate	QuarterID	
►	255885		64F40D09B4FE	Noel	Oslo	12/31/2010	1	

- The query compares the "QuarterID" values in the ClientReportSevicesVisit table AND the ClientReportServiceDelivered table to the "FirstServiceDate" value in the ClientReport table.
- Review and edit the values in these three tables as required and re-run query to ensure accuracy of the data.

MissingValues: If a client received service 8, ALL data elements must be reported for this client. The purpose of this query is to ensure that all required data is captured in the ClientReport table.

T-REX RSR Cli	T-REX RSR Client-Level Data XML Generator - [Missing Values : Union Query]							
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SOL - 1 - 1 - 14								
:								
ID	Client	Issue						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Enrollment Status						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing First Service Date						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Medical Insurance						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Poverty Level						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Prescribed HAART						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Prescribed PCP Prophylaxis						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Risk Screening Provided						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened Hepatitis B						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened Hepatitis C						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened Mental Health						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened Substance Abuse						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened Syphilis						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Screened TB						
255884	64F40D09B4FE1C733826415007B25B08E3E7C4E2U	Missing Vaccinated Hepatitis B						
256068	1C5E98E89427C05B69AC0A03664F7FC50A0E764CU	Missing Services						
256069	1C5E98E89427C05B69AC0A03664F7FC50A0E764CU	Missing Services						
256070	AE523FF5D9991AD10B57484CA94F35F812DB67D8U	Missing Services						
256071	9367B83D52ADFD0818B73CB53B2916A105C0F8AEU	Missing Services						
256072	RÚGÜ0101571U	Missing Services						
256073	Imal, Imal	Missing Services						
256074	Joe, Joe	Missing Services						
256075	Kevin, Kevin	Missing Services						
256076	Larry, Larry	Missing Services						
▶ 256077	C4164E7C4617DF12159F3B03A50A5A8920C72E68U	Missing Services						
256078	C2A2B121414B387D62D2E7198CFC58EBCD3E7F35U	Missing Services						

- The query cycles through all of the tables and reports missing information.
- Unless you receive one of the following messages, all of the "Issues" can be addressed directly in the ClientReport table:
 - "Missing Race": Refer to the ClientReportRace and ClientReport tables
 - "Missing HIV Risk Factor": Refer to ClientReportHivRiskFactor and ClientReport tables
 - "Missing Services": Refer to the ClientReportServiceVisits, ClientReportServiceDelivered, and ClientReport tables
 - "Missing Ambulatory Services": Refer to the ClientReportAmbulatoryService and ClientReport tables
 - "Missing CD4 Test Results": Refer to the ClientReportCD4Test and ClientReport tables
 - "Missing Viral Load Results": Refer to the ClientReportViralLoadTest and ClientReport tables

Review and edit the values in the appropriate table(s) as required and re-run query to ensure accuracy of the data.

Please refer to the data dictionary if you have any questions about the reporting requirements. <u>http://careacttarget.org/library/RSR_Client_Level_Data_Dictionary.pdf</u>.

If you want to see what your XML file data will look like when it is uploaded, you can view it in the T-REX Access Tables. Go to Section 2 for instructions on how to import your RSR XML file into T-Rex.

6. Tips on Saving Data Files

• <u>Use RSRClients.mdb as a template</u>. Do not work directly in the file called RSRClients.mdb. You want to make a copy of it and use that for the steps. Each time you seek to convert a new cycle of data to XML format, create a copy of RSRClients.mdb with the identifying date (e.g. RSRClients_Date.mdb). This way, you can keep track of the datasets you are converting and reference them when necessary.

We do this by right-clicking the file name, clicking "Copy", and then right-clicking in the whitespace (eg. Not on the file name, but in the same folder window) and selecting "Paste". This will create a copy. Click on the newly copied file (it will be called "Copy of RSRClients.mdb"). Rename this to "RSRClients_DATE.mdb", with the date in for format of YYYY_MM_DD (eg. 2001_02_23 for 02/23/2011). This is because file names cannot have slashes.

• <u>Create a database file for each provider.</u> Make a copy of **RSRClients.mdb** for each provider. Use an easy naming convention such as "*ProviderName_Date.mdb*" to keep track of the data you are uploading.

7. Converting Access Data to XML

The XML Convertor is located in **\RsrXmlGenerator\RsrXmlGenerator\bin\Debug**. The file name you are seeking in this folder is called **RsrXmlGenerator.exe**.

- Go to \RsrXmlGenerator\RsrXmlGenerator\bin\Debug
- Double-click the file called RsrXmlGenerator.exe. You should see the following screen:

📲 T REX 4.0.1		
File Database Se	tup Merge Clients Help	
Report Year:	2011	
XML File Name:	C:\Projects\RSR\RsrXmlGenerator\Testing.xml	Browse
li -	Generate XML Exit	

Note: For first time use, you should click on the 'Database Setup' Menu Option.

Setting up for the first time

1. Click the Database Setup menu item. Then select MS Access from the drop down list, regardless of which version of Access you used.

妃 Database Setup		
Database Type:	MS Access	~
Database Name:	MS Access MS Access 2007 SQL Server Enter database name	Browse
	Save Test Connection	Close

 Click "Browse..." and browse to the backup file that you created and pasted the information into from Step 4. It is quickest to do this by clicking "My Computer" > (C:) > T-RexFiles. Once you select the file, click open.

Open MS Acces	s Database					? 🗙
Look in:	🗀 T-RexFiles		~	3 🤣	•111 🥙	
My Recent Documents Desktop My Documents	Cher RsrClients.mdt RsrClients 201 RsrClientsSam RsrClientsSmal RsrClientsText	1-02-23.mdb ne.mab I.mdb Ids.mdb				
My Computer	File name:	BsrClients 2011-02-23 mdb				Open
My Network	Files of type:	MS Access Database			~	Cancel

- 3. Once the file is selected, click Close to return to the main T-REX screen where you will create the XML file.
- 4. When you are back at the below screen, you can type in any path to export the XML file to (such as the one below). You can also click Browse to find an already existing XML file to be overwritten, such as the one in the path below. (Note: it will overwrite without prompting)

File Database Se	etup Merge Clients Help	
Report Year:	2011	
XML File Name:	C:\Projects\RSR\RsrXmlGenerator\Testing.xml	Browse
1	Generate XML Exit	

- Ensure that the reporting year is entered correctly as well. This is used in validation to ensure that only services delivered during the reporting period are included in the XML output.
- Once the XLM File Name path is entered, click the "Generate XML button".
- You should then see a confirmation message:

RSR Client-Level Data XML Status								
i	Successfully created RSR Client-Level Data XML file containing 54 client records.							
	ОК							

Note: If you receive the following error, you did not specify your database file correctly in the Database Setup:

Validati	on Errors 🛛 🕅
8	Error: The element 'ROOT' in namespace 'urn:rsrNamespace' has incomplete content. List of possible elements expected: 'ClientReport'.
	ОК

If this happens, go back to Database Setup and be sure to choose the .mdb file that you pasted all of the information from Excel into. If you receive a different error, be sure that you ran the 3 queries to ensure that all of your data was entered properly and valid, fix any errors and try this step again.

If you received a notice indicating that there duplicate clients were detected, see the next section on **Merging Clients**.

Merging Clients

After you click Generate XML, T-REX will check to see if there are duplicate clients, and give you the opportunity to merge them. If there are duplicates, you will see the following pop-up.



Click OK, and then Click OK on the success screen. Now back in the main window, click on **Merge Clients**.

и Т-	REX 4.0.1					
File	Database Se	tup	Merge Clients	Help		
	Report Year:	2011				
	XML File Name:	C:\Pro	ojects\RSR\RsrXm	Generator	\Testing.xml	Browse
			Generate XM]	Exit	

This will bring up a large window with the first Primary and Secondary client duplicate detected.

You will see the headers to the left of the window, two columns for the Primary and Secondary clients (which are duplicates), and finally the last column shows what the record will look like once merged.

The duplicates should already be selected, but you may do so if they are not. If you have multiple duplicates, you would do the following step for each of those by selecting the second set of primary and secondary clients.

If the primary and secondary clients are <u>not</u> duplicates and should have their own separate records, then do not merge them. This might happen if you have two unique patients with the same name.

With the duplicates selected in Primary and Secondary Clients, Click "**Apply Default Merge Rules**" to T-REX to populate the checkboxes in the default way of merging. Once clicked, review the data on the right-hand side to ensure that the **Merged Client** record is accurate. If T-REX selected the wrong checkbox (eg. Wrong status, dates, etc), then check the appropriate checkbox to ensure that the final XML document includes the correct record.

When you are finished with that record and the way the Merged Client will be recorded, click the **Merge Clients** button.

Secondary Client: Michael Dols; 10	/03/1957; Unknown		•
Apply Default Merge Rules Merge C	lients		
	Primary Client	Secondary Client	Merged Client
	Select All	Select All	2001
AIDS Diagnosis Year:	2001	2001	2001
Death Date:			2.57
Enrollment Status:	2: Referred to another program or services, or	beca 2: Referred to another program or services, or b	Secar 2: Referred to another program or serv
Ethnicity:	2: Non-Hispanic	2: Non-Hispanic	2: Non-Hispanic
First Ambulatory Care Date:	May 17, 2008	May 17, 2008	May 17, 2008
First Service Date:	May 17, 2008	May 17, 2008	May 17, 2008
Geographic Unit Code:	255	255	255
HIV/AIDS Status:	4: CDC-defined AIDS	V 4: CDC-defined AIDS	4: CDC-defined AIDS
Housing Status:	3: Unstable	3: Unstable	3: Unstable
Poverty Level:	2: 101-200% of the Federal poverty level	2: 101-200% of the Federal poverty level	2: 101-200% of the Federal poverty lev
Pregnant:	1: Yes	✓ 1: Yes	1: Yes
Prenatal Care:	5: Not applicable	5: Not applicable	5: Not applicable
Prescribed ARV Medication:	3: Not applicable	3: Not applicable	3: Not applicable
Prescribed HAART:	1: Yes	1: Yes	1: Yes
Prescribed PCP Prophylaxis:	🔲 1: No	🔽 1: No	1: No
Received Cervical Pap Smear:	🗐 1: No	🔽 1: No	1: No
Risk Screening Provided:	🔲 2: Yes	🔽 2: Yes	2: Yes
Screened Hepatitis B:	🔲 1: No	📝 1: No	1: No
Screened Hepatitis B Since HIV Diagnosis:	🔲 1: No	🔽 1: No	1: No
Screened Hepatitis C:	🔲 1: No	🔽 1: No	1: No
Screened Hepatitis C Since HIV Diagnosis:	🔲 1: No	🔽 1: No	1: No
Screened Mental Health:	1: No	🔽 1: No	1: No
Screened Substance Abuse:	🔲 1: No	🔽 1: No	1: No
Screened Syphilis:	🔲 1: No	💟 1: No	1: No
Screened TB:	🔲 1: No	V 1: No	1: No
Screened TB Since HIV Diagnosis:	🔽 1: No	1: No	1: No
Transgender:	 [] :		:
Vaccinated Hepatitis B:	1: No	✓ 1: No	1: No

Once the clients have been merged, you should receive a confirmation message.



Click OK to the confirmation message, and then click Close in the Merge Clients window. Before moving forward, click Merge Clients in the menu again to ensure that there is not another set of duplicates. You should see the following message:

Merge Clier	its
0	There are no duplicate client records to merge.
	ОК

Until you see this message, continue to merge clients until all duplicates are merged (unless two records are meant to be separate as they are different individuals).

When there are no more duplicates, click **Generate XML** in the main window to update the XML file with the merged clients.

-	T-REX 4.0.1			
F	ile Database Se	tup Merge Clients	Help	
	Report Year:	2011		
	XML File Name:	C:\Projects\RSR\RsrXn	lGenerator\Testing xml	Browse
		Generate XM	L Exit	

You should again receive the confirmation message with a slightly smaller amount of records. The XML generation is now complete.

RSR Client-Level Data XML Status 🛛 🔀							
i	Successfully created RSR Client-Level Data XML file containing 54 client records.						
	ОК						

8. Creating the eUCI

T-REX will use the value in the ClientUci column if it is provided in the ClientReport table. If the ClientUci is not provided for a client and the ClientUrn is provided, then T-REX will use this value to generate the eUCI. If neither the ClientUci or ClientUrn is provided then T-REX will use the client's first name; last name; date of birth and gender code to create the UCI and subsequent eUCI.

If the eUCI is to be generated from the component parts and to ensure data quality and limited errors, make sure none of the following eUCI components begin or end with blanks or special characters:

- First name
- Last name
- Data of birth
- Gender code

The eUCI is generated using the file named UCI_Generator.dll. This file is linked into the program. The input values are read from the ClientReport database and the ClientUci is added to the XML file.

For more information on the eUCi, see "Guidelines for Creating the eUCI" http://www.careacttarget.org/library/Guidelines_for_Creating_the_eUCI.pdf

9. When Your Variables Do Not Match the RSR Elements

Consult the RSR Data Dictionary for details on the proper formatting of data and transactions. <u>http://careacttarget.org/library/RSR_Client_Level_Data_Dictionary.pdf</u>

For frequently asked questions regarding RSR elements and data submittal, see http://careacttarget.org/rsr.asp

If you need more information about data variables, you will find it in the Data Academy module "Getting Data from Existing Sources" at <u>http://www.careacttarget.org/dataacademy/</u>

10. Database Configuration for connecting to a remote SQL Server

These steps are only intended for those who choose to connect to a remote server rather than using their own Access database files. Before you can generate the RSR Client-Level Data XML file, you must configure your database for first time use through the Database Setup page. Once this step has been completed, you do not need to repeat it unless your database information has changed.

Main Menu

- Exit does just that, it exits the application.
- o Database Setup displays a form for configuring the database information.

• Main Form

- File Name is where the name and location of the RSR client-level data XML file will be created.
- Browse allows you to search for a path and specify the name of the RSR client-level data XML file.
- o Generate XML starts the process to create the RSR client-level data XML file.
- Exit exits the application.

🖶 Database Setup		
Database Type:	SQL Server 🗸	
Database Server:	Enter database server name	
Database Name:	Enter database name	
Access Mode:	Normal Integrated Security	
User Name:	Enter database user name	
Password:	•••••	
	Save Test Connection Close	

Setup Form

- Database Type is used to specify either a Microsoft Access or Microsoft SQL Server database. Depending on which type of those two databases you choose to use, the following items will be displayed.
- Database Server is the name of the machine where your SQL Server database is installed that has the RSR client-level data tables.
- o Database Name is the name of the database where your SQL Server tables are installed.
- Access Mode determines if you are connecting to the SQL Server database using a user name and password (Normal mode) or using Windows Authentication (Integrated Security mode).
- You must enter the *User Name* if Normal Access Mode is selected. The User Name must be a valid database user.
- You must enter the *Password* if Normal Access Mode is selected. The Password must be a valid password for the provided User Name.
- You can use the *Test Connection* to test the connection to your database using the values provided on the form.
- Click on *Save to* save the values on the form to the applications configuration file so that they will be available the next time you use the application.
- Click on Close to close the Setup form.

• Sample Database Configuration

- Create SQL Server Sample Tables is an SQL script to create the sample RSR client-level data tables used by T-REX to generate the RSR client-level data XML files. The tables are created in the "dbo" schema within SQL Server.
- *Empty SQL Server Sample Tables* is an SQL script that will empty the sample data from the RSR client-level data tables without removing the tables themselves.
- Drop SQL Server Sample Tables is an SQL script that will delete the database objects created with the Create SQL Server Tables script.

11. Removing Password from Access Database

If the database you are working with is password protected, you will need to remove password protection before using T-Rex. You can do this by following the steps below.

1. Start Access, and open the file exclusively by browsing to the file, and then clicking 'Open Exclusive' from the drop down arrow next to Open. Pressing **Ctrl-O** will open the open file dialog. Enter your password and click OK.

P	Open 🔻
	<u>O</u> pen
	Open <u>R</u> ead-Only
	Open Exclusi <u>v</u> e
	Open <u>E</u> xclusive Read-Only

2.

a. In Access 2003, go to Tools \rightarrow Security \rightarrow Unset Database Password

Microsoft Access				
Eile Edit View Insert	Too	ls <u>W</u> indow <u>H</u> elp		
1 🗋 💕 🖬 🖏 1 🗐 🖎 1	ABC	Spelling	F7	🛱 • 🖄 🐼 😭 📑 🚈 • 🗭
		Office <u>L</u> inks	►	
💷 database : Databası		Online Collaboration	+	
📑 Open 🖳 Design 🛅	×3	<u>R</u> elationships		
Objects 🛃		Anal <u>v</u> ze	+	
Tables		<u>D</u> atabase Utilities	×	
📑 Queries 💾		Securi <u>t</u> y	•	Unset Database Password
E Forms		Replication	- +	🌾 Workgroup Administrator
Peports		Startup		1 User and Group Permissions

b. In Access 2007, click tab Database Tools → Unset Database Password

External Data	Database Too	Is			
Property Sheet	4		10 -01 00 -11	🞲 Switchboard Manager	THE
Object Dependenc	ies 📳			🚰 Unset Database Password	Y
Message Bar	B	Server Database	Database Manager	🔐 Add-ins 🔹	MDE
w/Hide	Analyze	Move Data	Da	tabase Tools	

3. You will be prompted with a dialog box. Type in the password and click OK.

The database no longer has a password set. T-Rex should now be able to process your database and export to XML.

12. Getting Additional Support

SAIC (Original Developer of T-REX) Michael Dols Michael.J.Dols@saic.com

Sphere/Abt Contact RSR.TA@sphereinstitute.org

For questions related to the content or submission of the RSR: ryanwhitedatasupport.wrma@csrincorporated.com

Please also reference the Target Center website at: http://www.careacttarget.org.

Section 2A: Client-Level Data (CLD) XML File Microsoft Access 2003 Import Instructions

This section provides instructions for importing RSR CLD XML files into the Microsoft Access 2003 databases. Importing an RSR XML file into T-REX gives you the ability to view the RSR data in the Access Tables. Essentially, this is turning the XML file back into the Access Database.

Requirements

- Valid RSR CLD XML file
- Microsoft Access 2003
- RsrClientImport.mdb
- RsrClientXmlToMicrosoftAccessMap.xslt

The two necessary RsrClient files can be downloaded from https://performance.hrsa.gov/HAB/RSRFiles/

Please see Section 3 (Installing T-Rex) of User's Guide for directions on how to extract required files.

The downloaded folder structure:

C C C:) ► T-RexFiles ►	· · · · · · · · · · · · · · · · · · ·	Search T-RexFiles	Q
Organize 🔻 Include in library 🔻 Sha	re with 🔻 🛛 Bu	urn New folder	:=
Name	Size	Туре	Date modified
퉬 Application Files		File folder	4/4/2011 1:02 PM
\mu Source Code		File folder	4/4/2011 1:02 PM
SQL Server Scripts		File folder	4/4/2011 1:02 PM
🗐 ClientReportSample	77 KB	Microsoft Excel 97	3/1/2011 5:55 PM
ClientReportTemplate	3,322 KB	Microsoft Excel 97	1/5/2011 7:41 PM
RsrClientImport	14,516 KB	Microsoft Access	4/3/2011 12:09 PM
AsrClients	14,516 KB	Microsoft Access	3/4/2011 8:22 PM
AsrClientsSample	14,516 KB	Microsoft Access	3/4/2011 8:23 PM
RsrClientXmlToMicrosoftAccessMap	18 KB	XSL Transformation	4/3/2011 11:45 AM
🔁 T-REX Application	2 KB	Shortcut	3/3/2011 9:34 AM
🔁 T-Rex User Manual V2.0	313 KB	Adobe Acrobat D	2/12/2010 8:14 AM
11 items			

Microsoft Access 2003 Instructions

Step 1 Make a copy of the MS Access database RsrClientImport.mdb. This can be accomplished by clicking the file and then pressing CtrI-C followed by CtrI-V.

Step 2 Double-click the copy of the MS Access database you created in Step 1 to open it. If prompted, click enable editing.

File -> Get External Data -> Import Microsoft Access Eile Edit View Insert Tools Window Help Ado<u>b</u>e PDF <u>N</u>ew... Ctrl+N 2 Ctrl+O Open... | 🖳 + | 📇 <u>+ | 🦄 </u> 🔊 | 😭 | 📑 ⁄ 🖅 | 🛞 🖕 Get External Data ۶ š Import... ⊆lose Link Tables... += -📕 Save Ctrl+S Save <u>A</u>s... wizard Export... ing data Page Setup... Print Pre<u>v</u>iew ð 4 Print... Ctrl+P Sen<u>d</u> To ٠ Database Properties <u>1</u> db1.mdb 2 \Projects\RSR\...\RsrClientsSample.mdb 3 \Projects\RSR\...\RsrClients.mdb <u>4</u> \Projects\RSR\...\RsrClientsTextIds.mdb E⊻it ¥

Step 3 Import the XML file

Step 4 Browse to the folder containing your RSR client-level data XML file. Select Files of type XML (*.xml; *.xsd)

Import										×
Look <u>i</u> n:	🚞 XML Files	- Client Level Data	*	۰ 🕲	Q,	X 🖆	#	• Tools •		
My Recent Documents	C Kyle									
Desktop										
My Documents										
My Computer										
		r								
My Network	File <u>n</u> ame:						*		Import	
Places	Files of <u>t</u> ype:	XML (*.xml;*.xsd)					X		Cancel	
		Outlook() Paradox (*,db) Text Files (*,txt;*,csv; Windows SharePoint So XML (*,xml;*,xsd) ODBC Databases ()	;*.tab; ervices	*.asc) ()						

Step 5 Select the file and select the *Import* button

Import		×
Look in:	🛅 XML Files - Client Level Data 🛛 🕑 🗸 🎽 🔯 🛪 Tools 🗸	
	Kyle Image: Compart BGrantee.xml	
Documents	ATDS Center Of Oueens CountyFull.xml	
	Bailey-Boushay Annual Data 2009.xml	Do
Desktop	CLDClientExport Crook County Health Department.xml	ha ha
6	CLDClientExport_NorthShore.xml	n hr n In Mi
My Documents	CLDClientReport_02082010_142140.xml	∎Nε Int
My Computer	CDProviderExport.xmi ClientServices_Funder_Ryan White - Part A (EMA,TGA)_Clinic_THE SALVATION ARMY.xml Copy of UC_013940_20100226_111235 St Vincent Joh Cunningham.xml Copy of UC_014273_20100222_112440.xml Copy of UC_014273_Xml Co	N: N: Pr
S		>
My Network	File name:	
Places	Files of type: XML (*.xml;*.xsd)	

Step 6 Select the Options button



Step 7 Select the Transform...button

Import XML	
 Tables XmlVersion ClientReport ClientReportMedicalInsurance ClientReportRace ClientReportServiceVisits ClientReportAmbulatoryService ClientReportCd4Test ClientReportServiceDelivered 	OK Cancel Help Options >> Transform
Import Options O Structure Only Structure and Data Append Data to Existing Table(s)	

Step 8 Select the Add... button

Import Transforms	
Select a transform to apply before importing: (none)	OK Cancel Add Rename Remove
Transform Details Name: (none) Location:	

Step 9 Browse to the RsrClientXmlToMicrosoftAccessMap XSL transformation file, highlight the file and select the *Add* button

Add New Tran	sform								
Look <u>i</u> n:	🚞 RsrXmlGe	nerator	*	(2) -	🔰 🔇	X 🖻		Too <u>l</u> s •	
My Recent Documents	bin Lib My Project obj Resources	IToMicrosoftAcco	essMap.xslt						
My Documents My Computer			Q						
	File <u>n</u> ame:						*	<u> </u>	<u>A</u> dd
Places	Files of <u>typ</u> e:	Transforms (*.>	(sl; *.xslt)				*	Ca	ancel

Step 10 Select the Import Transform dialog OK button

Import Transforms	×
Select a transform to apply before importing: (none) RsrClientXmIToMicrosoftAccessMap	OK Cancel Add Rename Remove
Transform Details Name: RsrClientXmlToMicrosoftAccessMap Location: C:\Projects\RSR\RsrXmlGenerator\RsrClientXmlToMicrosoftAccessMap	rosoftAccessMap

Step 11 __Select the Append Data to Existing Table(s) radio button. Then, click OK.

Import XML	? ×
Tables ClientReport ClientReportMedicalInsurance ClientReportRace ClientReportHivRiskFactor ClientReportServiceVisits ClientReportServiceDelivered ClientReportAmbulatoryService ClientReportCd4Test ClientReportViralLoadTest	OK Cancel <u>H</u> elp <u>T</u> ransform
Import Options Structure Only Structure and Data Append Data to Existing Table(s)	

Microsof	t Office Access 🛛 🗙
(į)	Finished importing document 'C:\Projects\RSR\XML Files - Client Level Data\copy of UC_014273_20100222_112440.xml'.
	OK

Step 12 Press Ctrl-S to save the Database.

The following tables are populated with the data from the XML file:

- ClientReport;
- ClientReportAmbulatory;
- ClientReportCd4Test;
- ClientReportHivRiskFactor;
- ClientReportMedicalInsurance;
- ClientReportRace;
- ClientReportServiceDelivered;
- ClientReportServiceVisits; and
- ClientReportViralLoadTest

Note: Tables that did not have data in the XML file will not be created.

- 🖬 💁 (6	3 D. 77 X Q	10101011	新政府	V AIN	× 🗇 🕫 • 1 6	2						
CLD_ID	ReportPeriodID	ClientUci En	rollmentStatu	BirthYear	EthnicityID	GenderlD	PovertyLevelID	HousingStatusl	GeographicUnit	HivAidsStatusID	AidsDiagnosisY	FirstAmbula
	NaN	64F40D09B4FE Na	N	1957	1	1	NaN	NaN	208	1	1900	01/01/2005
	NaN	64F40D09B4FE 1		1965	2	1	4	3	012	1	2005	01/01/2006
	NaN	1C5E98E89427 1		1963	2	2	2	1	258	6	1900	05/17/2008
	NaN	105E98E89427 1		1946	2	2	1	1	258	6	1900	07/07/2008
	NaN	AE523FF5D999 1		1955	2	2	2	1	258	4	1999	05/17/200
	NaN	9367B83D52AD 1		1947	2	1	2	1	259	4	1999	05/17/200
	NaN	2618A637E864 2		1983	2	1	1	1	258	6	1900	05/17/200
	NaN	035EAE438553 1		1967	2	1	1	1	259	6	1900	05/17/200
	NaN	FF40C6585A9A 1		1965	2	1	2	1	258	4	2008	06/19/200
	NaN	4DAFF5A53D231		1966	2	1	1	1	253	4	2005	09/11/2008
	NaN	E6812E58020F(1		1987	2	2	1	1	258	4	2005	05/17/2008
	NaN	C4164E7C4617 1		1963	2	1	1	1	259	6	1900	05/18/2008
	NaN	C2A2B121414B 2		1966	2	1	1	1	252	4	2005	01/01/200
	NaN	B11559F13DD6 1		1967	2	1	3	1	259	6	1900	05/17/200
	NaN	83C23996B40E 1		1964	2	1	1	1	258	4	1991	05/17/200
	NaN	25DF708EBC65 1		1985	2	2	1	1	247	6	1900	05/17/200
	NaN	349BB56D65E9 1		1954	2	2	1	1	258	6	1900	05/17/200
	NaN	DA7522F92A01 1		1960	2	1	5	1	259	4	2005	05/17/200
	NaN	54390CE4CB17 1		1954	2	2	1	2	259	6	1900	10/06/200
	NaN	FC0CBF3EF9451		1949	1	1	1	1	258	6	1900	05/17/200
	NaN	75D97F5C0E64 1		1961	2	1	1	1	258	4	2006	05/17/200
	NaN	EBAD5B0C499I 1		1949	3	1	2	1	259	6	1900	05/17/200
	NaN	04C84D42848B 1		1949	2	1	2	1	247	4	2002	07/07/200
	NaN	535BC064F1C8 1		1956	2	2	1	1	258	4	2003	05/17/2008
	NaN	5D502520D8F9 1		1978	2	2	1	1	258	6	1900	05/17/200
	NaN	2D00E69B5587! 1		1953	2	1	3	1	258	6	1900	05/17/200
	NaN	03F623F3A364E1		1945	2	2	2	1	251	6	1900	07/07/200
	NaN	28B7F0B9328A 1		1970	2	2	1	1	111	4	1991	10/06/200
	NaN	9C005AB15161(1		1963	2	1	2	1	258	6	1900	05/17/200
	NaN	449F297977D1F1		1946	2	1	1	1	258	6	1900	07/07/2008
	NaN	A737A8FEAC6E1		1955	2	2	2	1	258	4	1999	05/17/2006
	NaN	23F9A364BD2F 1		1947	2	1	2	1	259	4	1999	05/17/200
	NaN	295C849CEDDC 1		1983	2	1	1	1	258	6	1900	05/17/200
	NaN	8FB3ED863547 1		1967	2	1	1	1	259	6	1900	05/17/200
	NaN	2E6A21D5FE0E 1		1965	2	1	2	1	258	4	2008	06/19/200
	NaN	F54264CDDA9C 1		1966	2	1	1	1	253	4	2005	09/11/200
	NaN	EDB07A44F8DE1		1987	2	2	1	1	258	4	2005	05/17/200
	NaN	C4164E7C4617 1		1963	2	1	1	1	259	6	1900	05/18/200
	NaN	C2A2B121414B 1		1966	2	1	1	1	252	4	2005	01/01/200
	NaN	B11559F13DD6 1		1967	2	1	3	1	259	6	1900	05/17/200
	NaN	83C23996B40F 1		1964	2	1	1	1	258	4	1991	05/17/200
	NaN	25DE708EBC651		1985	2	2	1	1	247	6	1900	05/17/200
	NaN	349BB56D85E9 1		1954	2	2	1	1	258	6	1900	05/17/200
	NaN	DA7522E92A01_1		1960	2	1	1	1	259	4	2005	05/17/200
	NaN	54390CE4CB17 1		1954	2	2	1	2	259	6	1900	10/06/200
	NaN	ECOCREGEE941		1949	2	1	1	1	258	6	1900	05/17/200
	NaN	75D97E5C0E64 1		1961	2	1	1	1	258	Ă	2006	05/17/200
	NaN	EBAD5B0C499[1		19.49	2	1	2	1	269	6	1900	05/17/200
	1 1 1	▶* of 54	<	1.000.0					2187			

Example of data contained in *ClientReport* table:

Section 2B: Client-Level Data (CLD) XML File Microsoft Access 2007 Import Instructions

This document provides instructions for importing RSR CLD XML files into Microsoft Access 2003 databases.

Requirements

- Valid RSR CLD XML file
- Microsoft Access 2003
- RsrClientImport.mdb
- RsrClientXmlToMicrosoftAccessMap.xslt

The two necessary RsrClient files can be downloaded from https://performance.hrsa.gov/HAB/RSRFiles/

Please see Section 3 (Installing T-Rex) of User's Guide for directions on how to extract required files.

The downloaded folder structure:

C C C:) ► T-RexFiles ►	• • •	Search T-RexFiles	Q
Organize 🔻 Include in library 🔻 Sha	re with 🔻 🛛 Bu	ırn New folder	:≡ ▼ 🔟 🔞
Name	Size	Туре	Date modified
퉬 Application Files		File folder	4/4/2011 1:02 PM
🐌 Source Code		File folder	4/4/2011 1:02 PM
SQL Server Scripts		File folder	4/4/2011 1:02 PM
🗐 ClientReportSample	77 KB	Microsoft Excel 97	3/1/2011 5:55 PM
ClientReportTemplate	3,322 KB	Microsoft Excel 97	1/5/2011 7:41 PM
Provident Report	14,516 KB	Microsoft Access	4/3/2011 12:09 PM
AsrClients	14,516 KB	Microsoft Access	3/4/2011 8:22 PM
AsrClientsSample	14,516 KB	Microsoft Access	3/4/2011 8:23 PM
RsrClientXmlToMicrosoftAccessMap	18 KB	XSL Transformation	4/3/2011 11:45 AM
📷 T-REX Application	2 KB	Shortcut	3/3/2011 9:34 AM
🔁 T-Rex User Manual V2.0	313 KB	Adobe Acrobat D	2/12/2010 8:14 AM
11 items			

Microsoft Access 2007 Instructions

Step 1 Make a copy of the MS Access database RsrClientImport.mdb. This can be accomplished by clicking the file and then pressing CtrI-C followed by CtrI-V.

Step 2 Double-click the copy of the MS Access database you created in Step 1 to open it. If prompted, click enable editing.

Step 3 Select the External Data tab

	🚽 ") -	(1 -) =							Table	Tools	Dat	abase2	: Databa	se (Acce	ess 2007) -	Microso	oft Access	
	Home	Create	Extern	nal Ra	ata	Database	Tools	Acrobat	Data	asheet								
Saved Imports	Access	Excel Sh	harePoint List	Te XI M	ext File ML File fore *	Saved Exports	Excel	SharePoint List Export	PDF or XPS	Wor Text	d File e *	Create E-mail Colle	Manage Replies ct Data	Work Online	Synchroniz	Cac Cac Cac Cac Cac Cac Cac Cac Cac Cac	card Changes he List Data ink Lists int Lists	Move to SharePoint
All Tab	les		 ✓ « 		Table1													
Table1			*		ID	- (Add N	ew Field										
Ta	able1 : Tab	le		*		(New)												

Step 4 Select the XML File command

								Table	e Tools Database2 : Database (Access 2007) - Microsoft Acc					Microsoft Access		
9	Home	Create	e Exter	mal Data	Database 1	ools	Acrobat	Data	isheet							
Saved Imports	Access	Excel S	SharePoint List	Text File	Saved Exports	Excel	SharePoint List	PDF or XPS	Wor Text	d File e *	Create I E-mail	Manage Replies	Work Online	Synchroniz	Discard Changes Cache List Data Relink Lists	Move to SharePoint
		Impo	ort				Export		Collect Data SharePoint Lists							
All Tabl	es		💌 «	Import XMI	file											
Table1			*	Import an	XML file.		d									
🛄 Та	ble1 : Tab	le		*	(New)	8										

The Get External Data – XML File dialog is displayed.

Get External Data - XML File	? 🛛
Select the source and destination of the data	
Specify the source of the data.	
Ele name: C:\Documents and Settings\dolsm\My Documents\	Browse
The source data will be imported into a new table in the current database.	
k	
OK	Cancel



The *File Open* dialog is displayed.

File Open						?	×
Look in:	🚞 XML Files - Client Level Data	~	¢	- 过	×	道 🏛	-
	🔂 UC_011560.xml						
	📴 UC_012138.xml						
My Recent	UC_013912_20100204_162826 Siouxland Falls.xml						
Documents	UC_014212_20100114_100231.xml						
	UC_014212_20100114_111746.xml						
	C_014273_20100120_153016.xml						
Desktop	UC_014731_20100126_121915.xml						
	Em UC_015329_20100215_104644.xml						
	UC_015482_20100211_155028.xml						
	uc_016069_20100218_160516.xml						
My Documents	unity Health Care.xm						
	unity RSR Client Level 2009 12 23 FIXED.xml						
	unity RSR Client Level 2009 12 23.xml						
	untitled2.xml						
My Computer	untitled3.xml						
	wikki Scotti Multnomah 01_RSRXML_12312009.xml						
My Network							
Places							>
	File name:			~			
	Files of type: XML (*.xml;*.xsd)			~			
Tools 🔹			Оре	:n		Cancel	

Step 6 Locate and select the RSR CLD XML file that you want to import and either double-click on the file or select the *Open* button.

Step 7 Select the Get External Data – XML File OK button



Step 8 Select the Import XML Transform button



Step 9 Select the Import Transforms Add button.

Import Transforms	? 🔀
Select a transform to apply before importing: (none)	OK Cancel Adite: Rename Remove
Transform Details Name: (none) Location:	

Step 10 Select the RsrClientXmIToMicrosoftAccessMap.xslt file and either double-click on the file or select the *Add* button.

Add New Trans	form	? 🛛
Look in:	See Local Disk (C:)	🕑 🕲 • 🖄 🗙 🔛 •
My Recent Documents Desktop My Documents My Computer My Network Places	Archives Documents and Settings HAB Inetpub MOCCache Program Files Restore Rest Sandbox Software Temporary Test T-Rex VSS WINDOWS MappingMapToRsrClientSchemaOutput.xslt	
	File name: Files of type: Transforms (*.xsl; *.xslt)	
Tools 🔹		Add Cancel

Step 11 Select the *Import Transforms OK* button to accept the changes.

Import Transforms	? 🔀
Select a transform to apply before importing: (none) RsrClientXmlToMicrosoftAccessMap	Cancel Add Rename Remove
Transform Details Name: RsrClientXmlToMicrosoftAccessMap Location: C:\RsrClientXmlToMicrosoftAccessMap.xslt	

Step 12 Select the Append Data to Existing Table(s) radio button. Then, click OK.

Import XML	? X
Tables ClientReport ClientReportMedicalInsurance OlientReportBace ClientReportHivRiskFactor ClientReportServiceVisits ClientReportServiceDelivered OlientReportAmbulatoryService OlientReportCd4Test OlientReportViralLoadTest	OK Cancel Help Transform
Import Options Structure Only Structure and Data Append Data to Existing Table(s)	

The Get External Data – XML File dialog is displayed.



Step 13 Select the Get External Data – XML file Close button.

Step 14 Press Ctrl-S to save the Database.

The following tables are populated with the data from the XML file:

- ClientReport;
- ClientReportAmbulatory;
- ClientReportCd4Test;
- ClientReportHivRiskFactor;
- ClientReportMedicalInsurance;
- ClientReportRace;
- ClientReportServiceDelivered;
- ClientReportServiceVisits; and
- ClientReportViralLoadTest

Note: Tables that did not have data in the XML file will not be created.

Example of data contained in *ClientReport* table

New Jews	Paste	¥ Cut ↓ Copy J Format Painter Clipboard	Cslibri * 11 B <i>I</i> <u>U</u> <u>A</u> + <u>∆</u> + ⊞+ Font		(〒(〒)・1 (三):三(セン) Bich Text	Refresh All * X Dela	r Σ Totals t ♥ Spelling rte = ₩ More =	24 X1 D Fitter Sort 2	Selection *	Find Replace		
13] ClientR	eport										
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	,	1 NaN	64F40D09B4FE1 NaN	1957	1	1	NaN	NaN	208	1	1900	01/01/2005
	2	2 NaN	64F40D0984FE1 1	1965	2	1	4	3	012	1	2005	01/01/2005
	3	3 NaN	1C5E98E89427C 1	1963	2	2	2	1	258	6	1900	05/17/2008
	4	1 NaN	1C5E98E89427C 1	1946	2	2	1	1	258	6	1900	07/07/2008
	5	5 NaN	AE523FF5D999: 1	1955	2	2	2	1	258	4	1999	05/17/2008
	6	5 NaN	9367883D52AD 1	1947	2	1	2	1	259	4	1999	05/17/2008
	7	7 NaN	2618A637EB64E 2	1983	2	1	1	1	258	6	1900	05/17/2008
	8	5 NaN	035EAE4385535 1	1967	2	1	1	1	259	6	1900	05/17/2008
	- 5	9 NaN	FF40C6585A9A 1	1965	2	1	2	1	258	4	2008	06/19/2008
	10) NaN	4DAFF5A53D23 1	1966	2	1	1	1	253	4	2005	09/11/2006
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	12	2 NaN	C4164E7C4617E 1	1963	2	1	1	1	259	6	1900	05/18/2008
	13	3 NaN	C2A2B1214148 2	1966	2	1	1	1	252	4	2005	01/01/2001
	14	4 NaN	B11559F13DD6 1	1967	2	1	3	1	259	6	1900	05/17/2008
	15	5 NaN	83C23996B40EE 1	1964	2	1	1	1	258	4	1991	05/17/2008
	16	5 NaN	25DF708EBC65: 1	1985	2	2	1	1	247	6	1900	05/17/2008
	17	7 NaN	349BB56D85E9(1	1954	2	2	1	1	258	6	1900	05/17/2008
	18	ŝ NaN	DA7522F92A01 1	1960	2	1	5	1	259	4	2005	05/17/2008
	19	9 NaN	54390CE4CB17/ 1	1954	2	2	1	2	259	6	1900	10/06/2008
	20) NaN	FCOCBF3EF949(1	1949	1	1	1	1	258	6	1900	05/17/2008
	21	1 NaN	75D97F5C0E64(1	1961	2	1	1	1	258	4	2006	05/17/2008
	22	2 NaN	EBAD5B0C499C 1	1949	3	1	2	1	259	6	1900	05/17/2008
	23	3 NaN	04C84D42848B: 1	1949	2	1	2	1	247	4	2002	07/07/2008
	24	1 NaN	535BC064F1C88 1	1956	2	2	1	1	258	4	2003	05/17/2008
	25	5 NaN	5D502520DBF9 1	1978	2	2	1	1	258	6	1900	05/17/2008
	26	5 NaN	2D00E69B55875 1	1953	2	1	3	1	258	6	1900	05/17/2008
	27	7 NaN	03F623F3A364€ 1	1945	2	2	2	1	251	6	1900	07/07/2008
	28	š NaN	28B7F0B9328A1 1	1970	2	2	1	1	111	4	1991	10/06/2008
	29	9 NaN	9C005AB15161(1	1963	2	1	2	1	258	6	1900	05/17/2008
	30	0 NaN	449F297977D1F 1	1946	2	1	1	1	258	6	1900	07/07/2008
	31	1 NaN	A737A8FFAC6E 1	1955	2	2	2	1	258	4	1999	05/17/2008
	32	2 NaN	23F9A364BD2F 1	1947	2	1	2	1	259	4	1999	05/17/2008
	33	3 NaN	295C849CEDD0 1	1983	2	1	1	1	258	6	1900	05/17/2008
	34	4 NaN	8FB3ED863547[1	1967	2	1	1	1	259	6	1900	05/17/2008
	35	5 NaN	2E6A21D5FE08 1	1965	2	1	2	1	258	4	2008	06/19/2008
	36	5 NaN	F54264CDDA90 1	1966	2	1	1	1	253	4	2005	09/11/2008
	37	7 NaN	EDB07A44F8D6 1	1987	2	2	1	1	258	4	2005	05/17/2008
	38	8 NaN	C4164E7C4617E 1	1963	2	1	1	1	259	6	1900	05/18/2008
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