Provide Enterprise
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Reporting/Data Basics

Provide Enterprise User Guide

Virginia Department of Health

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Table of Contents

Chapter One: Introduction & Background 3

Chapter Two: Understanding Document Storage 4

Definition of a Document 4

Document Storage 4

Document Tables 5

tblDocument_Info 5

Data Tables tblform_name_[field_name] 6

tblProvide_Document_Summary 6

tblDocument_Access 7

Bucket Tables 7

Walk through of Saving a Document 8

Step 1 8

Step 2 8

Step 3 8

Step 4 9

Step 5 9

Walkthrough of Viewing a Document 9

As Of Date 9

Document Versions 10

Chapter Three: Understanding Table Relationships 11

Linking Tables from Different Documents by Client 12

Linking Tables from an Activity Document to a Reference Document 13

Chapter 4 : Views in Provide Enterprise 15

Changing/Sorting Views 15

Filtering Views 17

Adjusting Tab Sizes 18

Type Ahead in Views 19

Saving View Data to Excel 20

Chapter 5: Crystal Reports for Provide Enterprise 22

Using Parameter Fields and Selection Criteria in Embedded Crystal Report Objects 26

Client Parameter Fields and Selection Criteria 27

Creating a Parameter Field 27

Adding a Selection Criteria to the Report 28

Suggested Parameter Field Prompts and Selection Criteria – Client Reports..... 29
Parameter Field Prompts..... 29
Selection Criteria Formula..... 29
Suggested Parameter Field Prompts and Selection Criteria – Document Reports..... 29
Parameter Field Prompts..... 29
Selection Criteria Formula..... 30
Passing a SQL Query from Provide Enterprise to a Crystal Report..... 30
Managing Crystal Report Objects in Provide Enterprise..... 32
Adding a New Report Object..... 32
Deleting a Report Object..... 33
Verifying a Report Object..... 34
Chapter 6: Using Microsoft Access for Reporting..... 35
Linking to Provide Enterprise Data from within Access..... 35
Chapter 7: Functional Area Views and Tables..... 38
Care Services and VA MAP..... 38
Status Neutral..... 39
PrEP..... 40
Data to Care..... 40
CHARLI Case Management..... 40

Chapter One: Introduction & Background

While most users of the Provide® Enterprise system use it to track, manage and coordinate the care of Clients, there are also those people within an organization responsible for reporting on and accounting for the activities of the staff that use Provide® Enterprise everyday. There are a variety of ways to work with the data from Provide Enterprise.

- Views - Defined “lists” of data elements that can be refreshed from within Provide Enterprise. Views allow you to “drill down” into the main record being displayed on screen.
- Crystal Reports - Crystal Reports are able to be created and then deployed into the Provide Enterprise database . Once this is done, security can be applied to the reports to allow specific user roles to be able to generate the report from within Provide Enterprise.
- Any other data management tool that allows you to connect via ODBC to the SQL database can be used. Please note: reports created with these tools cannot be viewed from within Provide Enterprise. Examples of data management tools are:
    - Microsoft SQL Server Management Studio
    - Microsoft Access
    - Tableau
    - PowerBI

Chapter Two: Understanding Document Storage

This chapter will review how document storage functions in Provide Enterprise.

Definition of a Document

Within Provide® Enterprise, a document is a set of related information that records a unit of knowledge or work. The document's information may be formatted on a standard form, just as a paper form can be used to document information. While the form may include headers, footers and static text, the document actually contains the information that is collected. Characteristics of a document include:

- Authoring information - who edited it and when.
- Access control - who may see it or change it.
- Life span - a creation date, modified dates, various state transitions and modifications, destruction. Important to this concept is that a document's existence has a lasting impact even after it is deleted. The fact that a document is deleted does not nullify the impact that it had. For this reason, even deleted documents are retained internally for auditing purposes.
- Named fields - information is stored in named fields. These fields can be of different types of data (text, numbers, dates, rich text) and differing quantities (single or multiple values).

This definition is the basis for the design of the database schema as described in the next section.

Document Storage

Because each implementation of Provide® Enterprise may have a different database schema depending on customer requirements, Provide® Enterprise uses a model

architecture to define how the schema is to be built. Key to the architecture is the support of document storage.

Document Tables

tblDocument_Info

This is the base document table, which contains the following fields:

Form	The name of the form as specified in the Data Dictionary SQLForm field.
DocID	The document unique ID throughout the document lifespan.
SQLID	The document unique ID for a given point in time in which the document was saved. There may be multiple SQLID's for a given DocID.
ModDate	The GMT timestamp of when the document was saved according to the clock of the system where it was saved.
LocalModDate	The GMT timestamp of when the document was saved in this database.
RepID	The system ID where the document was updated. This is the Provide® Enterprise System ID as found in the Publish Control record.
UName	The user ID that updated the document.
ALimitAccess	Limit access flag. If this flag is set to "Yes", then regular security is bypassed and the document reader list must be manually set.
DeleteFlag	Y or N. Marks whether or not this document is deleted in Provide® Enterprise.

Data Tables tblform_name_[field_name]

Single-value fields may be combined into common tables. Multiple value fields should be isolated to their own tables. Table names begin with "tbl", which is prefixed to the SQL Table name defined in the Data Dictionary Field. The suggested table naming convention is to use the SQL form name and replace all special characters with underscores. Multiple value tables should then suffix the form name with the field name. A document may have several data tables to store all the data related to that document type. User access to the tables is restricted to insert new records only.

SQLID	Same as in tblDocument_Info
IDX	The zero-based index of the value, for multi-valued fields. Defaults to 0.
Field…	The data field columns in alphabetical order

tblProvide_Document_Summary

This table contains the SummaryText field for all Client, Activity and Reporting documents. It also contains the necessary information so that access control lists can be calculated after the record is inserted.

SQLID	Same as in tblDocument_Info
IDX	The zero-based index of the value, for multi-valued fields. Defaults to 0.
ClientProfileID	The internal unique Client ID
Form	The SQL Form Name
SubForm	For Assessments, the type of assessment
Aorg	Organization creating the form
Apgm	Program creating the document

AactivityDate	Activity Creation Date
SummaryText	The Selector or SelectorDescription

tblDocument_Access

This table lists the read and write groups for each SQLID instance of a document. It is only used for Client, Activity and Reporting documents.

Form	The SQL form name
AOrg	The organization
APgm	The program
DocID	The document unique id
SQLID	The instance SQLID
AccessDate	The effective access date
AccessType	“R” for read, “W” for write
AppliedDate	The date this record was created

Bucket Tables

Bucket tables are used to store information that is not deemed important to report against, but are necessary for the Provide® Enterprise application. They are also used to store fields not defined in the Data Dictionary. Bucket tables include tblchar_bucket, tblvarchar_bucket, tbldatetime_bucket, tblint_bucket, and tblfloat_bucket. The format of these tables is: Character fields are limited to 7500 characters. Text fields are limited to 2GB.

SQLID	Same as in tblDocument_Info
IDX	The zero-based index of the value, for multi-valued fields. Defaults to 0.

FieldName	The name of the document field
BucketValue	The value of the document field

Walk through of Saving a Document

The process of saving a document involves many steps that are bunched into a transaction. By bunching these steps into a transaction, the system will not store partially processed documents.

Step 1

Establish the start of a transaction.

Step 2

sp_Provide_Update_Document is called. This stored procedure first validates the data needed to be written into tblDocument_Info. It then checks to see if the User saving the document has the access to do so by calling fn_Validate_Provide_Document_Action. This function then takes the document type and checks it against the User's permissions/roles. If everything checks out, a record is inserted into tblDocument_Info for the current document. If not, the transaction is rolled back (all information previously written to the database in this transaction is removed) and an error is returned stating why the record could not be saved (Incorrect data sent or user does not have permission).

Step 3

Information about what data tables this document is stored in is read from the data dictionary. Then for each table defined in the dictionary the corresponding fields are read from the document and saved in each table. Each data table has a trigger that is run just prior to the record being written to the database that checks that there is a record in tblDocument_Info that matches. If no matching record is found, the transaction ID is rolled back and an error is returned.

Step 4

For documents that require further security, such as Client information, Client activity and reporting, a record is added to the tblProvide_Document_Summary. This table contains a trigger that calls sp_CalculateSecurityForDocument. This stored procedure will add records to tblDocument_Access for the organization – programs that should have access to this document.

Step 5

If no errors were encountered, then the transaction is completed and ended. The document is now saved in the database.

Walkthrough of Viewing a Document

The viewing of documents or parts of a document is controlled by the use of views. Two views exist for every data table that is defined in the database: the secure view and the secure data view.

User access to the secure view is not allowed and is restricted to read only for the secure data view. The secure view creates a list of documents that the current User has access to see. This is done by taking the organization and program stored in the User's current user profile, the As Of Date (see below) and joining it with records that match the document type, organization, program and date modified in tblDocument_Access. The secure data view then joins the secure view with the data table to get all the data in the data table that the User has access to see. A stored procedure for each document type is used by the system to easily load all the data from all the tables that are for a given document type.

As Of Date

Another function of the view is to display only the most recent version of the document as it was on the As Of Date. By default, the As Of Date is set to the future and the document returned is the most recent document saved. This date can be changed in the current user profile to reflect a date in the past. This will cause the document to be displayed as it was on the date set in the current user profile.

Document Versions

Each time a change is made to a document, new records are written to the tables (see Saving a Document). This creates multiple "versions" of each document. Each version of the document is assigned a SQLID that is a unique identifier.

Table has following fields:

SQLID	DocID	Date Modified
123	456	1/1/2000
124	456	1/2/2000
125	456	1/3/2000

The view would show:

SQLID	DocID	Date Modified
125	456	1/3/2000

Chapter Three: Understanding Table Relationships

As we learned in the previous chapter, documents can be stored in many tables. In this chapter we will cover how the table relationships define the document.

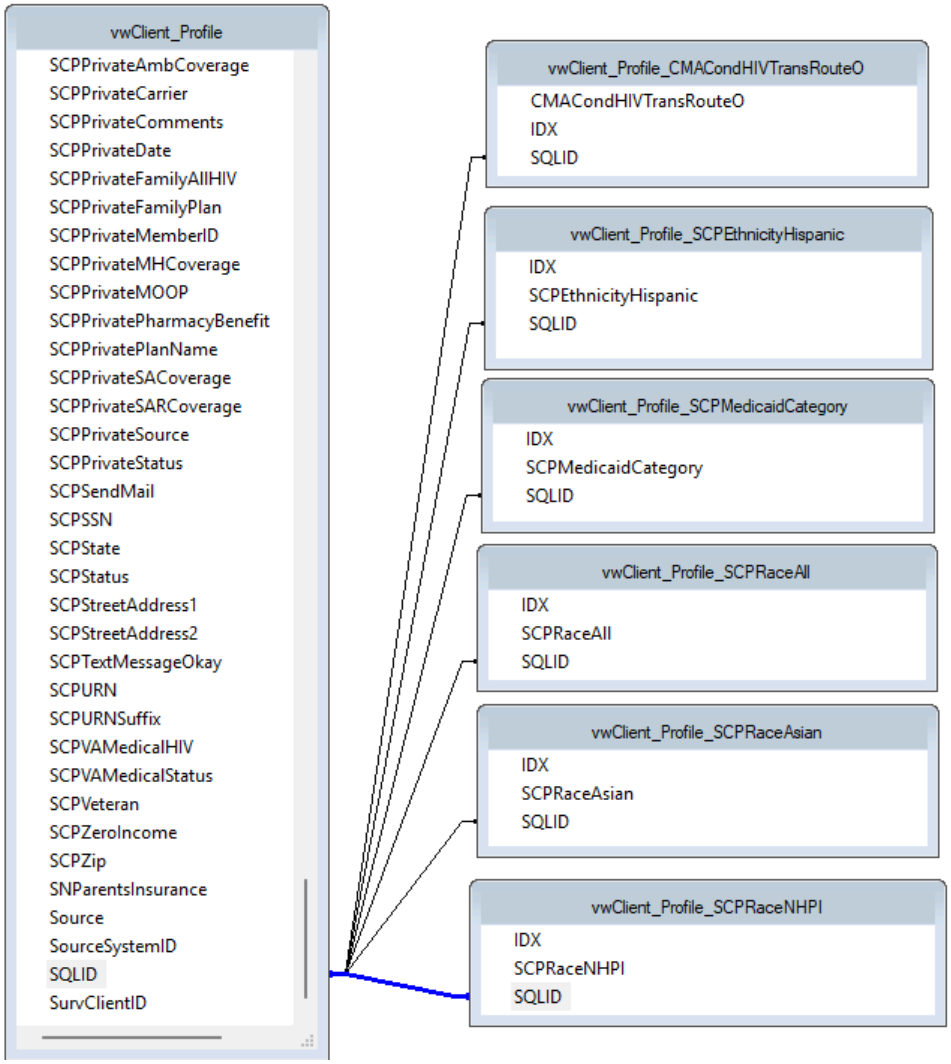


Figure 1

In Figure 1 we show the links for the Client Profile Document. You can see all the multi-value fields are linked to the Client Profile Table by SQLID. These tables can contain several records with the same SQLID. The IDX field in these tables along with the SQLID provides a unique key for the table.

Linking Tables from Different Documents by Client

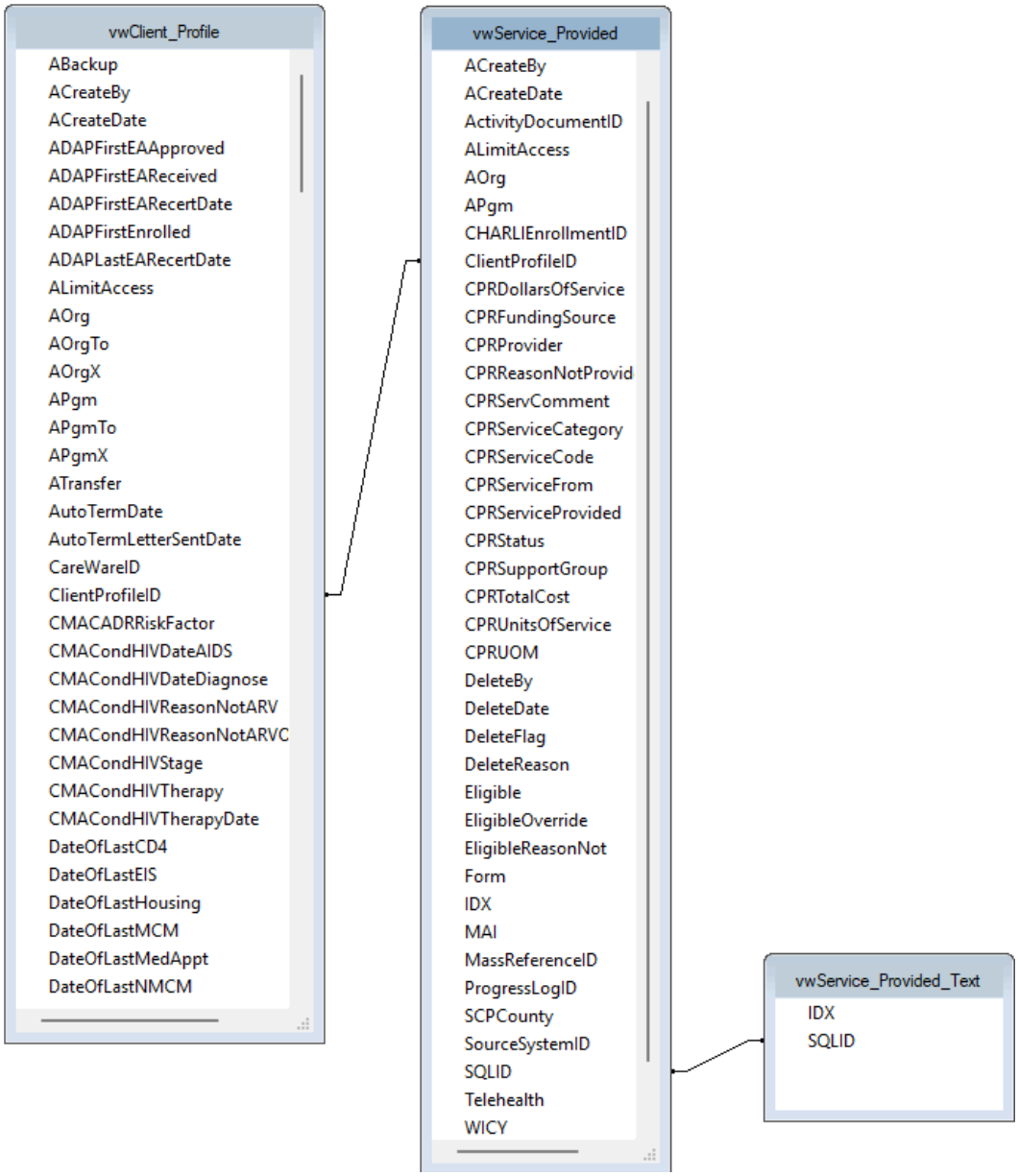


Figure 2

In figure 2 we show the link of the Client Profile to a Service Provided and then linking from the Service Provided to the Service Provided Text view. You can link Client records by ClientProfileID on any activity documents main document table. You can then also link sub tables for the various documents to the documents main table. In this example, we use the Service Provided Text table so that you could pull the comments field from the Service Provided Record.

Linking Tables from an Activity Document to a Reference Document

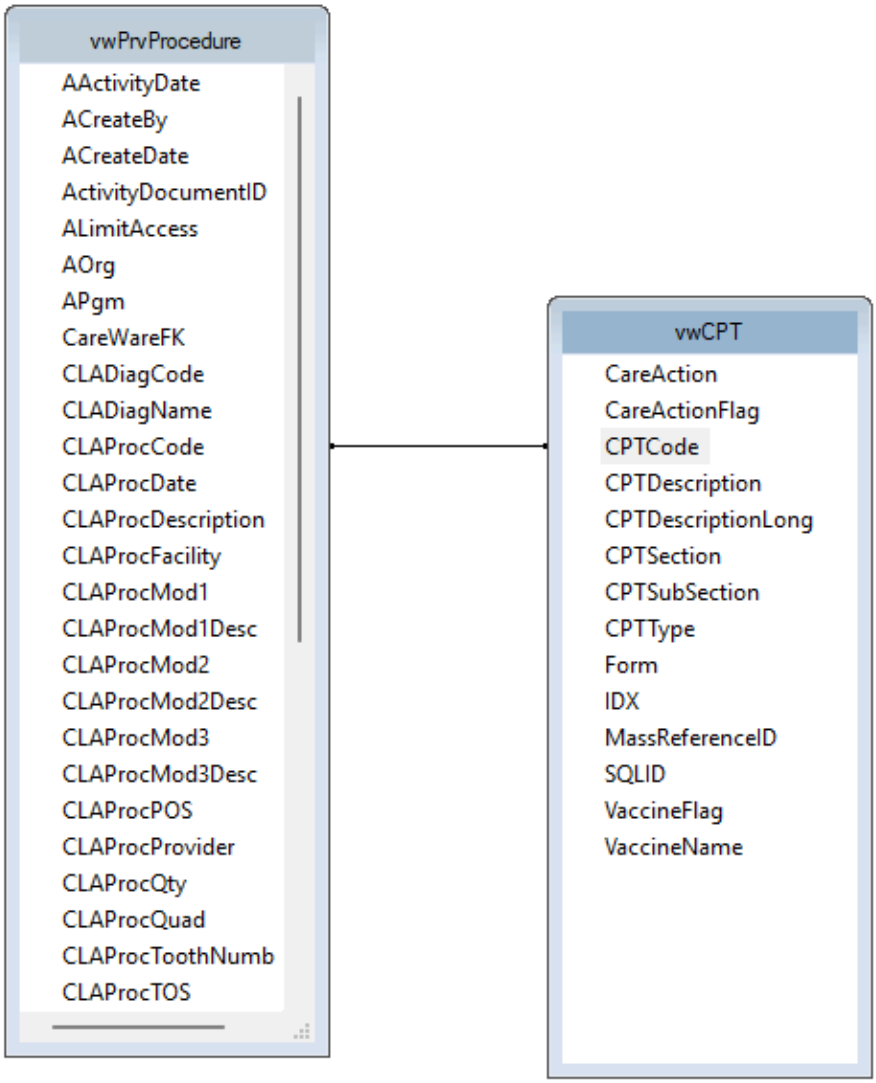


Figure 3

In figure 3 we show the link of the Procedure to the CPT Procedure Codes. You can link Client procedure records to the CPT Procedure Reference Table by the Procedure Code. This could be used to pull the details of the CPT code into your report.

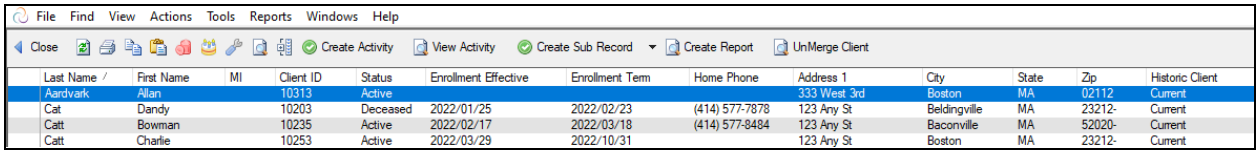
Chapter 4 : Views in Provide Enterprise

The use of Views in Provide Enterprise is a powerful way to quickly view data for which you have access, without a complicated report. Views are basically SQL Queries made against the data in Provide Enterprise, but presented in an easy-to-understand format.

Changing/Sorting Views

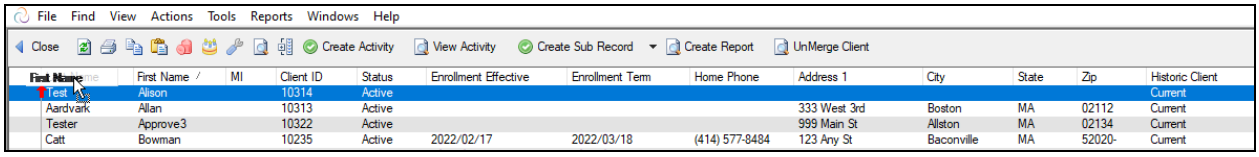
In Provide® Enterprise, you can change how the views are displayed to you. You can sort any views by simply dragging columns depending if you want to view columns in a specific order.

For example, if you want to display a client list by last name it would appear like below:



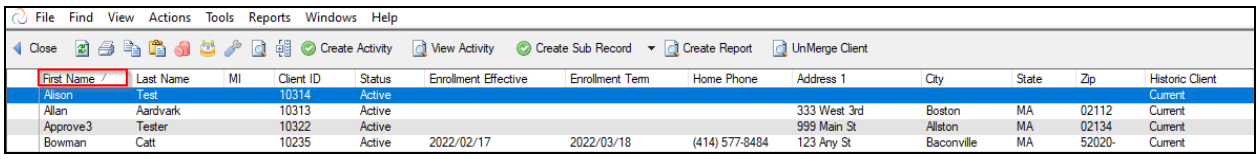
Last Name	First Name	MI	Client ID	Status	Enrollment Effective	Enrollment Term	Home Phone	Address 1	City	State	Zip	Historic Client
Aardvark	Allan		10313	Active				333 West 3rd	Boston	MA	02112	Current
Cat	Dandy		10203	Deceased	2022/01/25	2022/02/23	(414) 577-7878	123 Any St	Beldingville	MA	23212-	Current
Catt	Bowman		10235	Active	2022/02/17	2022/03/18	(414) 577-8484	123 Any St	Baconville	MA	52020-	Current
Catt	Charlie		10253	Active	2022/03/29	2022/10/31		123 Any St	Boston	MA	23212-	Current

However, if you want to display your client list by first name listed first in the grid, you would click on the first name column header and drag it in front of the last name column. As seen below: (notice the red arrow)



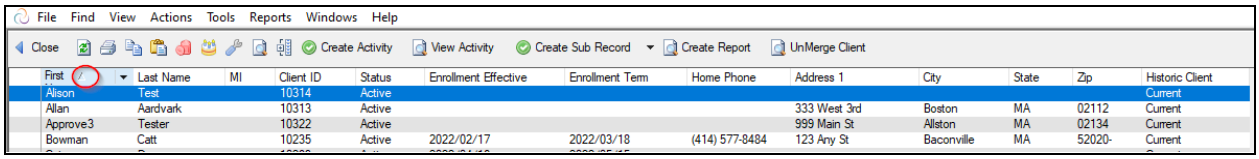
First Name	Last Name	MI	Client ID	Status	Enrollment Effective	Enrollment Term	Home Phone	Address 1	City	State	Zip	Historic Client
Test	Alison		10314	Active								Current
Aardvark	Allan		10313	Active				333 West 3rd	Boston	MA	02112	Current
Tester	Approve3		10322	Active				999 Main St	Allston	MA	02134	Current
Catt	Bowman		10235	Active	2022/02/17	2022/03/18	(414) 577-8484	123 Any St	Baconville	MA	52020-	Current

The view will then appear with the “First Name” as the first column:



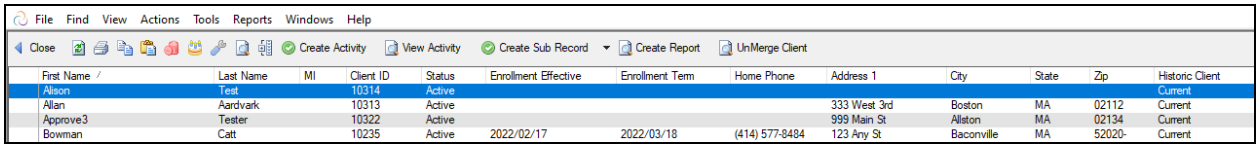
First Name	Last Name	MI	Client ID	Status	Enrollment Effective	Enrollment Term	Home Phone	Address 1	City	State	Zip	Historic Client
Alison	Test		10314	Active								Current
Allan	Aardvark		10313	Active				333 West 3rd	Boston	MA	02112	Current
Approve3	Tester		10322	Active				999 Main St	Allston	MA	02134	Current
Bowman	Catt		10235	Active	2022/02/17	2022/03/18	(414) 577-8484	123 Any St	Baconville	MA	52020-	Current

You are also able to sort each column simply by clicking on the column header:



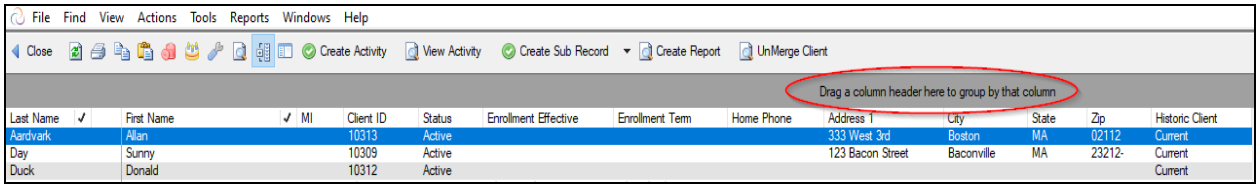
A will be displayed in the column indicating the direction of the sort. In the example above, the First Name is sorted by descending alphabetical order (sort A→Z). A would indicate ascending order (sort Z→A). Clicking one time will give you a descending order and clicking twice will give you an ascending order.

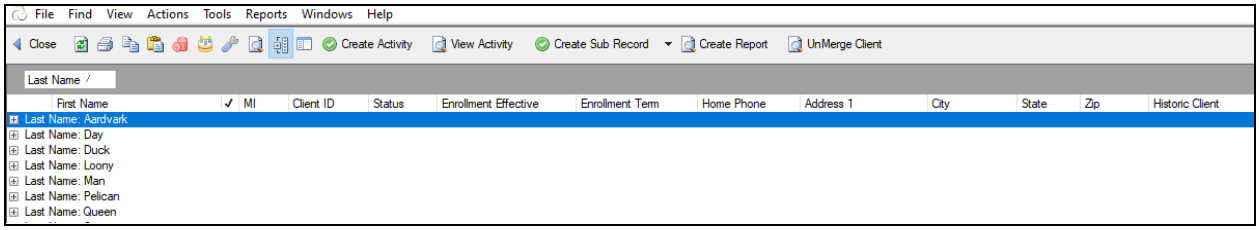
You can also change the size of your columns by simply dragging the sides of the columns.



In any view that you are attempting to search, you can also group the view by clicking on on top of the page. After you click on the icon, your screen will appear like the one below. You will see the screen below and "Drag a column header here to group by that column."

Drag the column header to the designated area to group by that view. For example, if you want to group your view by last name, you can drag the column "Last Name" into the box as seen below:



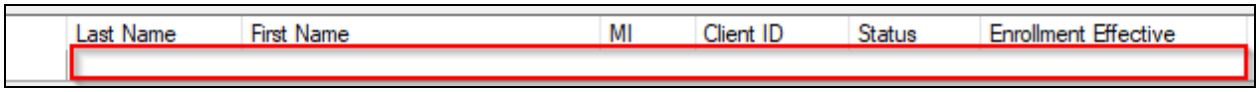


To "Ungroup" your view, drag the column out of the designated area. You can then click on the grouping button again to remove the filtering column header gray box from your view.

These sorting/grouping options are available in all views. When you log-off of Provide® Enterprise or refresh the view, the views will return to their default settings.

Filtering Views

To filter a view, click on to show the filter bar. A bar will appear on top of your screen similar to the one below depending on the view you are currently viewing:



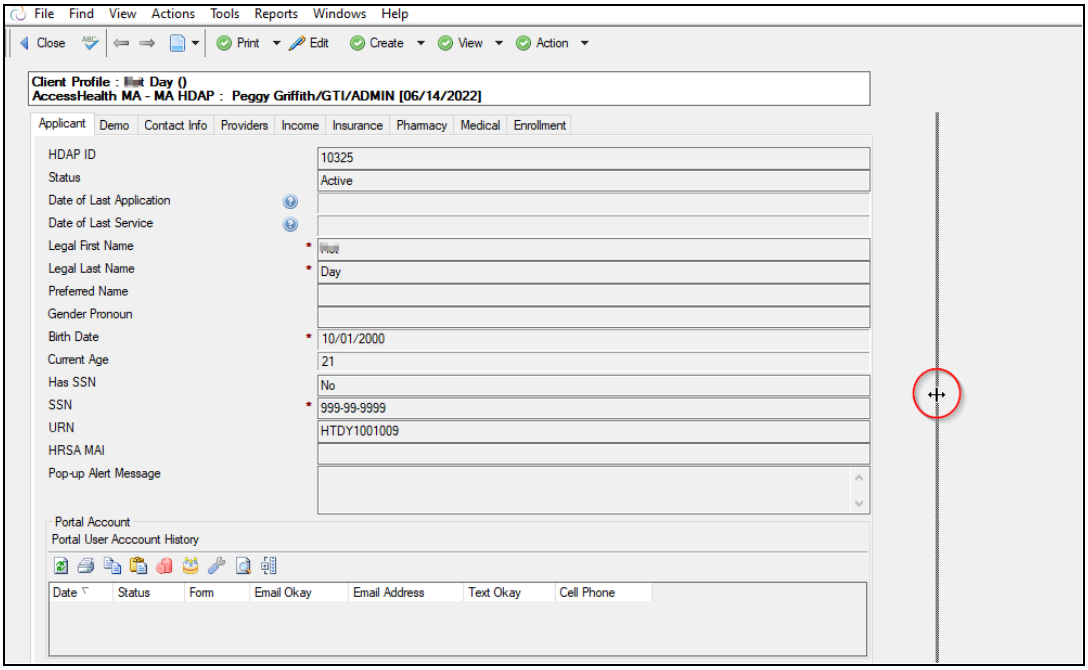
In any of the boxes, you may filter your view. For example, if you would like to view all of the Enrollment Effective in 2022, you can simply enter "2022" in the Date box.

Client ID	Status	Enrollment Effective 2022	E
10203	Deceased	2022/01/25	2
10235	Active	2022/02/17	2
10253	Active	2022/03/29	2
10222	Open	2022/02/03	2
10254	Active	2022/04/05	2
10261	Active	2022/03/25	2
10260	Active	2022/03/25	2

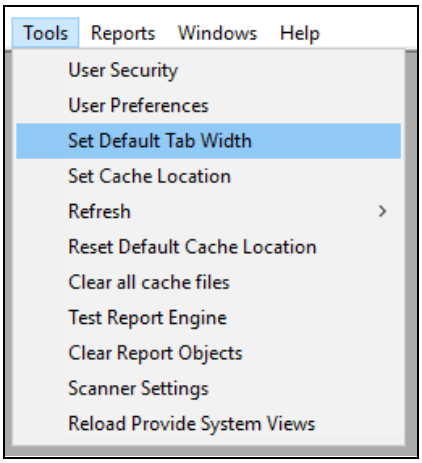
This will filter your view to only see clients with an Enrollment Effective date in 2022. To remove the view filter, simply delete the text you entered (in the example above, delete the "2022"). If you do not want to see the filter bar, click on the filter icon to remove the filtering bar from your view.

Adjusting Tab Sizes

You can also change the size of your tabs by simply dragging the side of the tab.

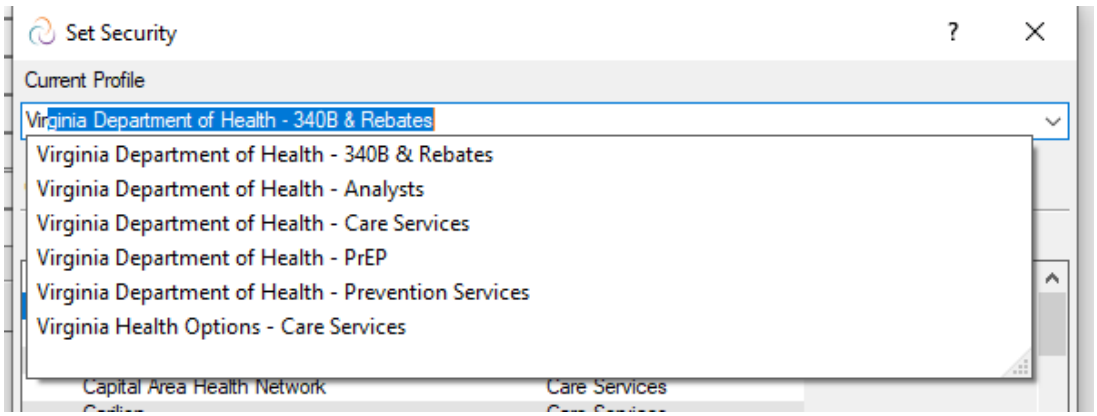


Once you have the tabs the size you would like, you can set the size as your default tab size by clicking on Tools – Set Default Tab Width. This will save your default tab width.



Type Ahead in Views

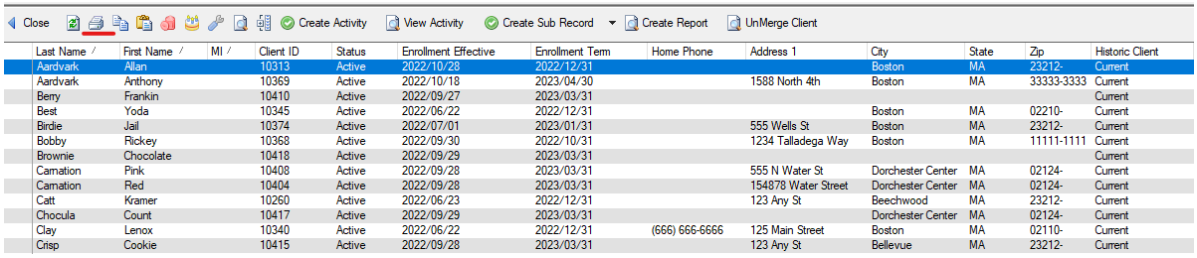
In any view that you are attempting to search, you can "Type Ahead" to help increase the speed of your searching. These filtering options are available in all views. In the example below, if you were searching for "Virginia Department of Health – MA HDAP", you could start typing "A" and the choices would start to load for you.



You can type several characters to navigate to additional values in the picklist, or you can use the up and down arrow keys on your keyboard to move through the list.

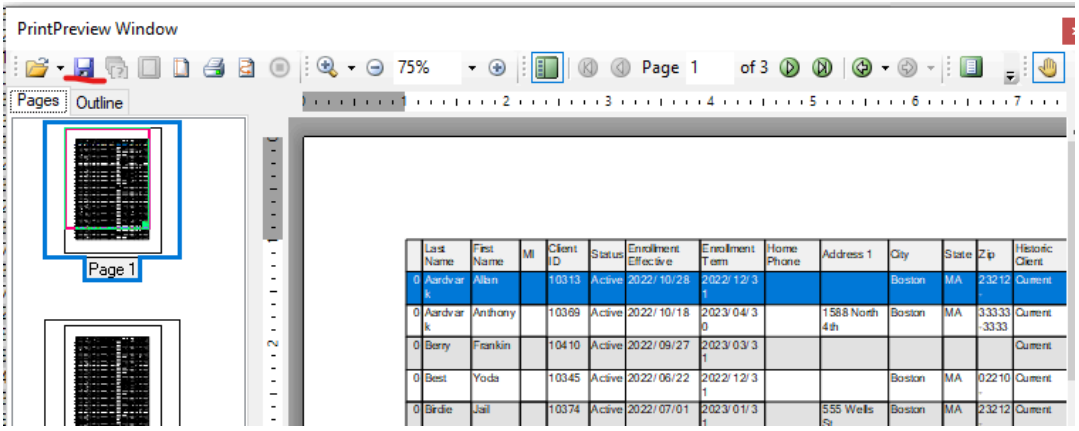
Saving View Data to Excel

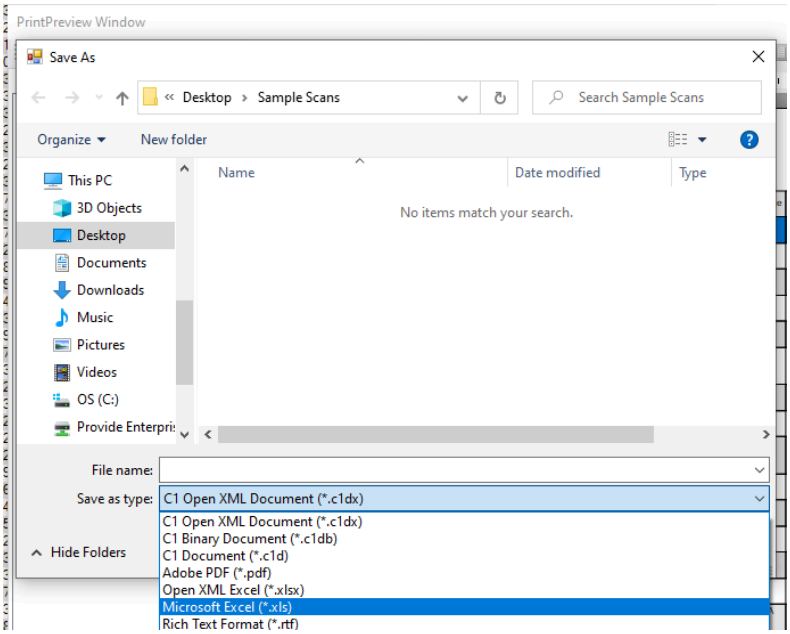
Another powerful way to leverage data within Views, is to save the data in Excel format for further analysis. From any view, click the icon.

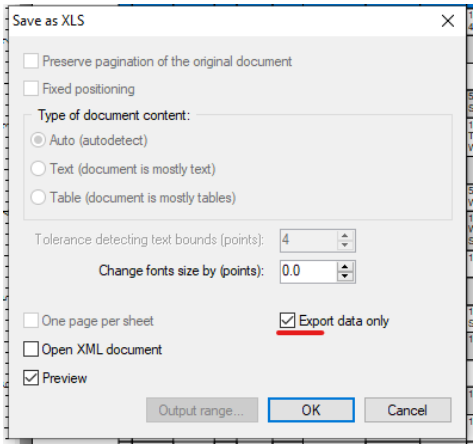


Last Name	First Name	MI	Client ID	Status	Enrollment Effective	Enrollment Term	Home Phone	Address 1	City	State	Zip	Historic Client
Aardvark	Allan		10313	Active	2022/10/28	2022/12/31			Boston	MA	23212-	Current
Aardvark	Anthony		10369	Active	2022/10/18	2023/04/30		1588 North 4th	Boston	MA	33333-3333	Current
Berry	Frankin		10410	Active	2022/09/27	2023/03/31						Current
Best	Yoda		10345	Active	2022/06/22	2022/12/31			Boston	MA	02210-	Current
Birdie	Jail		10374	Active	2022/07/01	2023/01/31		555 Wells St	Boston	MA	23212-	Current
Bobby	Rickey		10368	Active	2022/09/30	2022/10/31		1234 Talladega Way	Boston	MA	11111-1111	Current
Brownie	Chocolate		10418	Active	2022/09/29	2023/03/31						Current
Carnation	Pink		10408	Active	2022/09/28	2023/03/31		555 N Water St	Dorchester Center	MA	02124-	Current
Carnation	Red		10404	Active	2022/09/28	2023/03/31		154878 Water Street	Dorchester Center	MA	02124-	Current
Catt	Kramer		10260	Active	2022/06/23	2022/12/31		123 Any St	Beechwood	MA	23212-	Current
Chocula	Count		10417	Active	2022/09/29	2023/03/31			Dorchester Center	MA	02124-	Current
Clay	Lenox		10340	Active	2022/06/22	2022/12/31	(666) 666-6666	125 Main Street	Boston	MA	02110-	Current
Crisp	Cookie		10415	Active	2022/09/28	2023/03/31		123 Any St	Bellevue	MA	23212-	Current

From the Print Preview Window, click the Save button. In the Save As dialog box, save the file as Microsoft Excel (*.xls). When prompted, check the box for Export Data Only. See screenshots below.



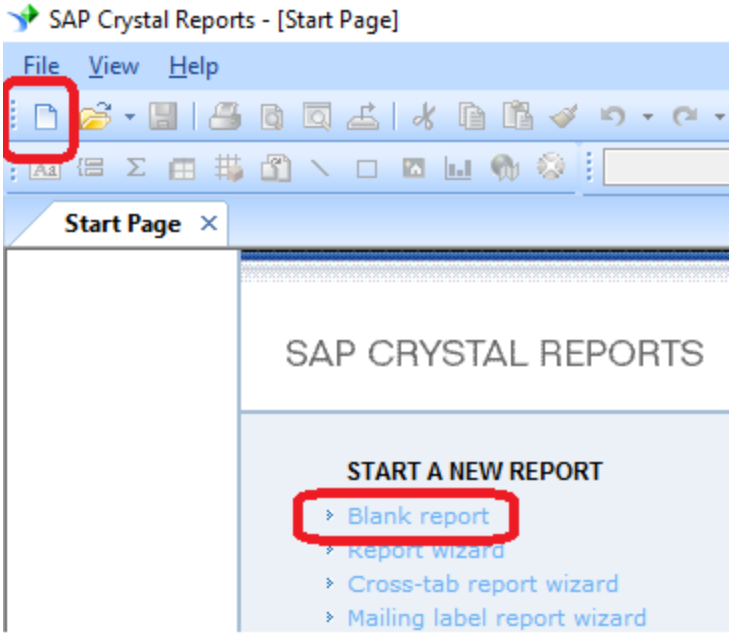

PrintPreview Window
Save As
Desktop › Sample Scans
Search Sample Scans
Organize
New folder
This PC
3D Objects
Desktop
Documents
Downloads
Music
Pictures
Videos
OS (C:)
Name
Date modified
Type
No items match your search.
File name:
Save as type:
C1 Open XML Document (*.c1dx)
C1 Binary Document (*.c1db)
C1 Document (*.c1d)
Adobe PDF (*.pdf)
Open XML Excel (*.xlsx)
Microsoft Excel (*.xls)
Rich Text Format (*.rtf)
Hide Folders


Save as XLS
Preserve pagination of the original document
Fixed positioning
Type of document content:
Auto (autodetect)
Text (document is mostly text)
Table (document is mostly tables)
Tolerance detecting text bounds (points):
4
Change fonts size by (points):
0.0
One page per sheet
Export data only
Open XML document
Preview
Output range...
OK
Cancel

Chapter 5: Crystal Reports for Provide Enterprise

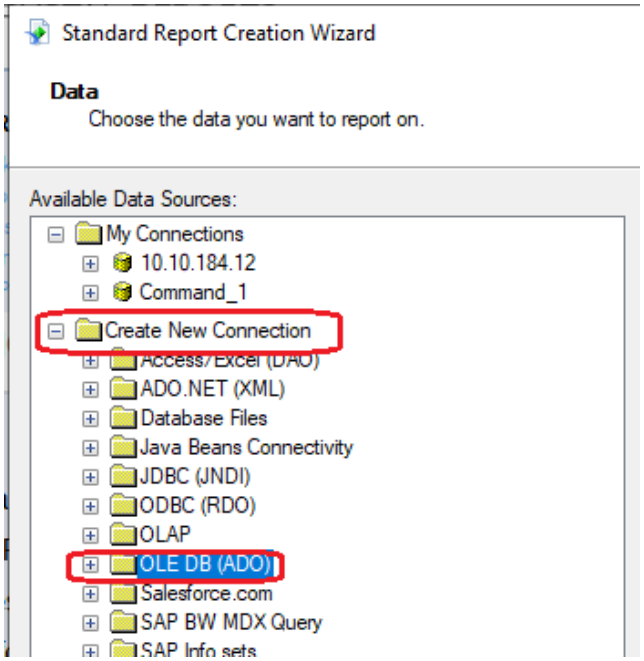
Crystal Reports 2008 and later are excellent tools for creating reports that can be run directly from Provide® Enterprise. Outlined below are the steps needed to design embedded Crystal Reports effectively for use within Provide® Enterprise. This chapter is not meant to be an overview of Crystal Reports and assumes that the user already is familiar with this report building tool.

- When Crystal Reports starts up the welcome dialog may open by default. If it does, simply select "As a Blank Report" and choose "OK" as shown below.
- If it does not open the welcome dialog, simply click on the New Report icon in the toolbar or select "Blank Report" under Start New Report in the Navigation Pane.

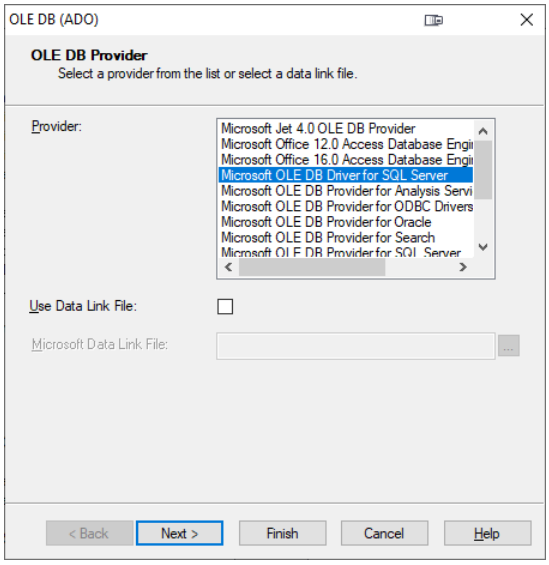


- When the Data Explorer opens, scroll down to the "Create New Connection" folder and open it. If you have previously connected to Provide Enterprise servers, you will see them listed in your data source list and can use any of these connections to continue working with that existing data source.

- If connecting to a new database, choose “Create New Connection” and then select OLE DB (ADO).

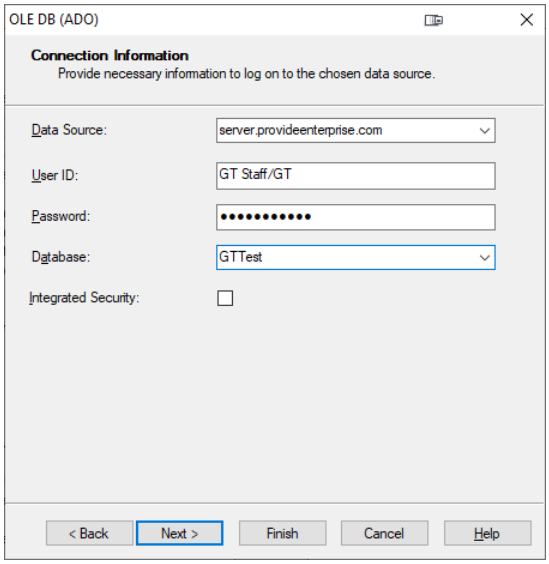


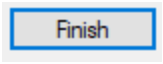
- A dialog similar to that below will open:



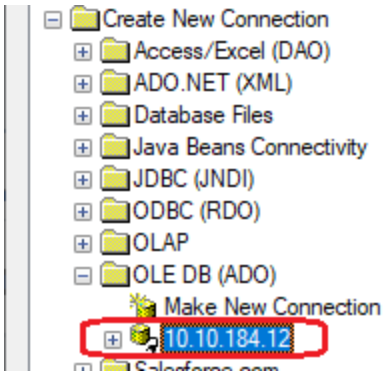
- Select “Microsoft OLE DB Driver for SQL Server” and click on the “Next” button.

- Once the Connection Information box opens type in your Provide Enterprise server name, user name, password and database name.

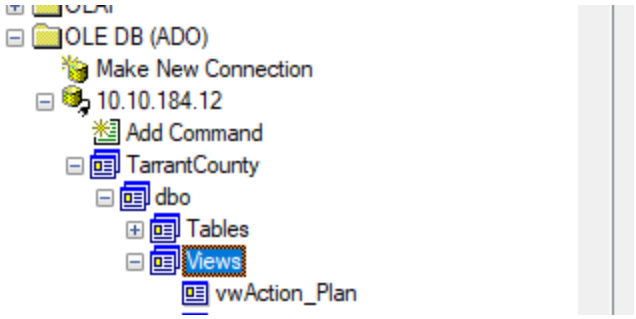


NOTE: These will match what you use to log into Provide Enterprise. Click the  button to continue to the Data Explorer.

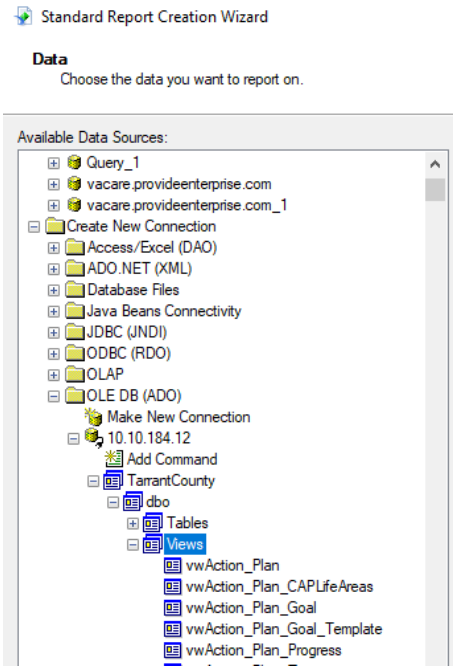
Once the Data Explorer opens on your screen expand the folder for your server as shown below:



- Click the ⊞ button in front of the server to show the Databases, Tables and Views.

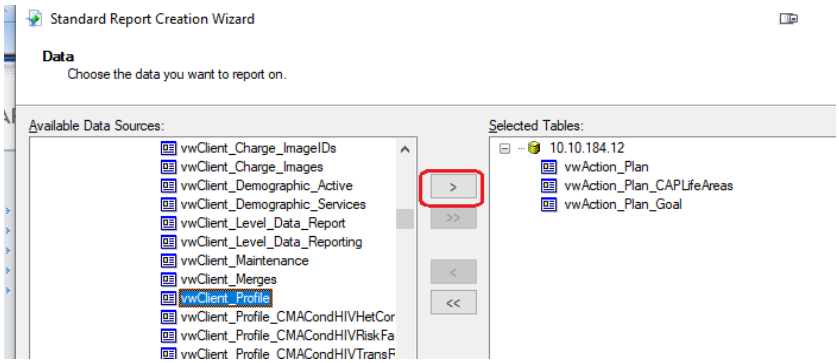


- Scroll down the list until you see the views that you wish to add to the report. The naming convention for the views is databasename.dbo.vwXXXXX.



NOTE: You will only have access to the Views. Access is not provided to the underlying Tables.

- Find the view(s) you wish to add, select the views and click on the add button as shown below:



- Once you have added all the necessary views for your report you should decide if this report is meant to capture all records of a certain type or a limited set of records.
- If it is meant to capture all records you can proceed with the design of your Crystal Report. If you want to limit the set of records you may want to add a parameter field so that you do not need to add the full data search query in the record selection formula. Instead, parameter fields can be used to appear each time the report is run, so the user can customize the data that will be included in their run of the report.

Using Parameter Fields and Selection Criteria in Embedded Crystal Report Objects

When embedded in Provide® Enterprise, Crystal Reports can be "called" from three different places. Client reports can be "called" from the Client Profile (Create Activity – Report) or from the Clients Views (if you wish to create the report on multiple Clients). Document reports can be "called" from individual forms in Provide® Enterprise, generally when attached to a "Print" button in the form. Stand Alone reports are not dependent on any particular document and can be run anywhere in the Provide® Enterprise Client, using the "Reports – Run" function.
In the case of Client and Document reports, you must create a parameter field and a selection criteria in your Crystal Report so that the report "knows" which Client or document it should be associated with. In the section below, you will learn how to create this parameter field and the associated selection criteria.

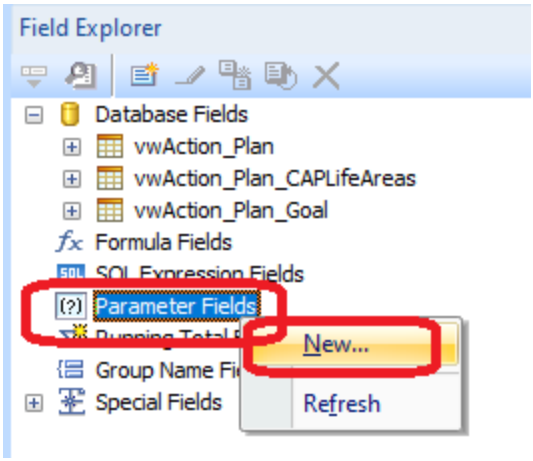
Client Parameter Fields and Selection Criteria

If your report is going to be "called" from the Client Profile or from the Clients views, you must add a parameter field and selection criteria item to your report utilizing the ClientProfileID (the Provide® Enterprise assigned unique identifier for each Client).

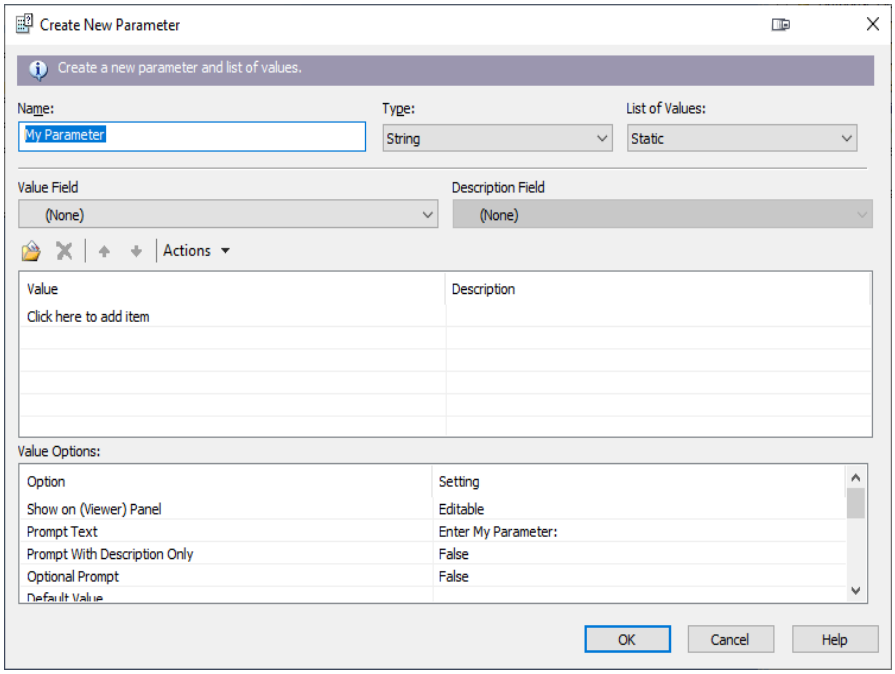
Creating a Parameter Field

To add a parameter field, follow these steps:

- Within your report, you must first navigate to the FIeld Explorer. Depending on your installation of Crystal Reports, you may find it "pinned" to your main report window, or you can get to it by selecting "VIew\Field Explorer" from the Windows Toolbar.



- Once you have the Field explorer up, Right Click with your mouse on "Parameter Fields" and then select "New". A dialog box similar to the one below will appear:



- Fill out the "Name" and "Type" fields as discussed below. If the parameter field is going to include multiple values (i.e. you are running the report on more than one Client at a time, make sure that Allow Multiple Values is selected under "Options".
- Click on the

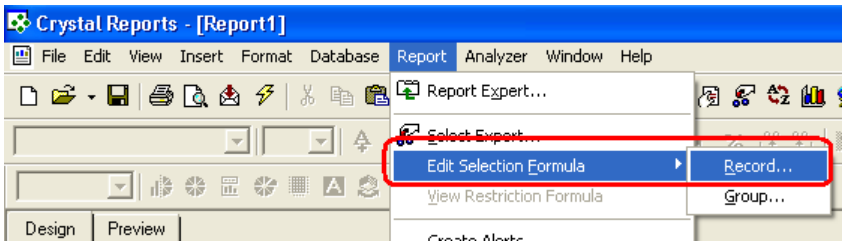
button to continue. Your parameter field will be saved.

Adding a Selection Criteria to the Report

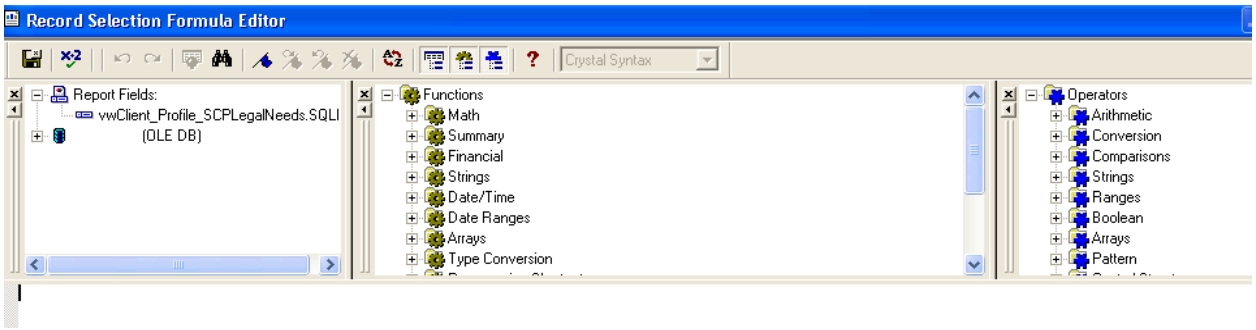
Once you have added your Parameter field, you are ready to include the parameter field in the Selection Criteria for your report.

To add the selection criteria, follow the steps below:

- From the Windows Toolbar, select "Report – Edit Selection Formula – Record", circled in the following figure.



- The Record Selection Formula Editor Window, similar to that in the figure below, will open on your screen.



- In the Criteria window at the bottom of the Formula Editor, enter your formula, as suggested below.
- Once done, click on the button to check your formula. If there are no errors, you can then click on the button to save and close the Formula Editor.

Suggested Parameter Field Prompts and Selection Criteria – Client Reports

If you are going to use the Report as a Client report (discussed above), you should fill out the Parameter Field Prompts and the Selection Criteria as listed below:

Parameter Field Prompts

- Name: CPIDs
- Value Type: String
- Allow Multiple Values: Select this if you want to be able to run this report on multiple Clients at a time.

Selection Criteria Formula

- **Parameter Field Name:** {?CPIDs}
- **Selection Formula:**
  - {?CPIDs} = {vwClient_Profile.ClientProfileID}

Suggested Parameter Field Prompts and Selection Criteria – Document Reports

If you are going to use the Report as a Document report (discussed above), you should fill out the Parameter Field Prompts and the Selection Criteria as listed below:

Parameter Field Prompts

- Name: SQLID

- Value Type: String
- Allow Multiple Values: Select this if you want to be able to run this report on multiple records at a time.

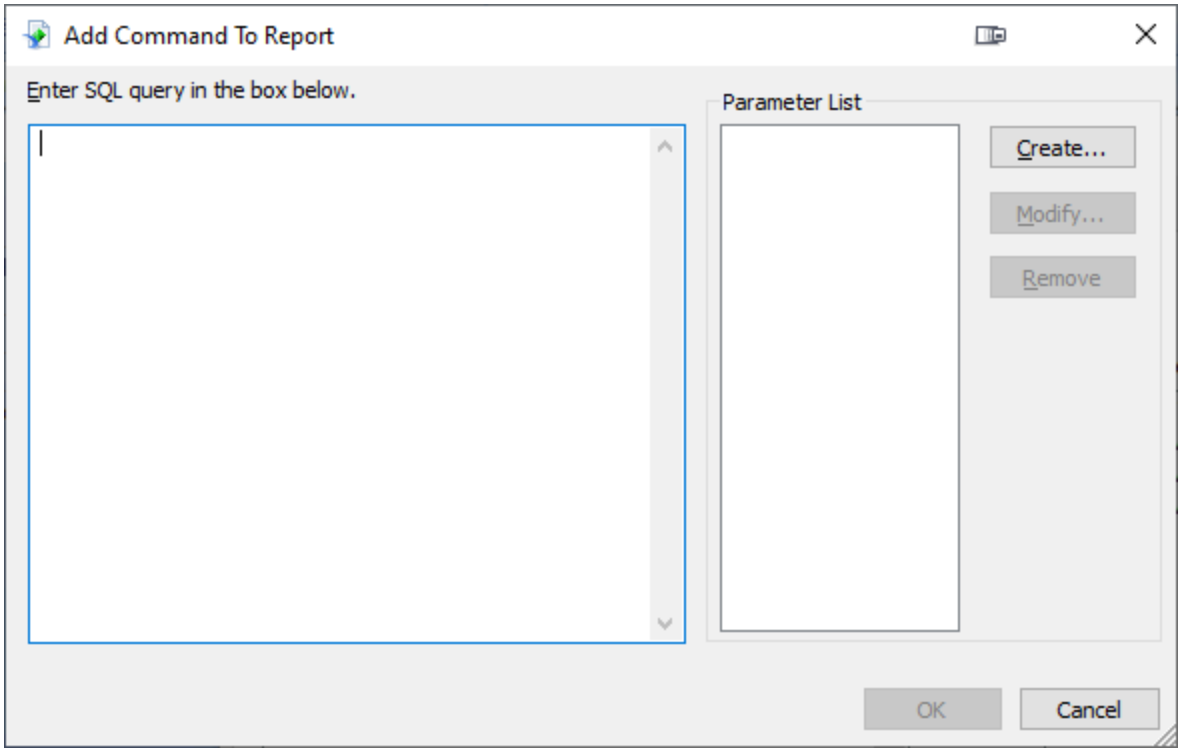
Selection Criteria Formula

- **Parameter Field Name:** {?SQLID}
- **Selection Formula:**
    - {?SQLID} in totext({vwFormName.SQLID})
        - VWFormName = the SQLID from the form the report is being called from.

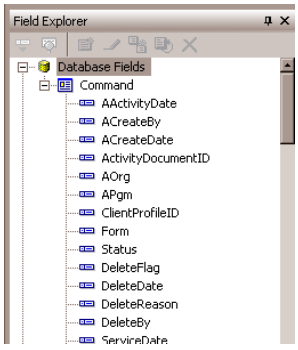
Passing a SQL Query from Provide Enterprise to a Crystal Report

Crystal Reports give you the ability to embed SQL Queries within the report, rather than building the queries by selecting tables. When creating a report like this, it is best to begin with the creation of the Command object and then create the design of your report from that. NOTE: Dynamic Parameters (values in the parameter picklist change based on live data) do not function appropriately with this.

- Click to Expand the connection to the Server (if not expanded already)
- Double Click with your mouse on 'Add Command'.
- The following window will appear:



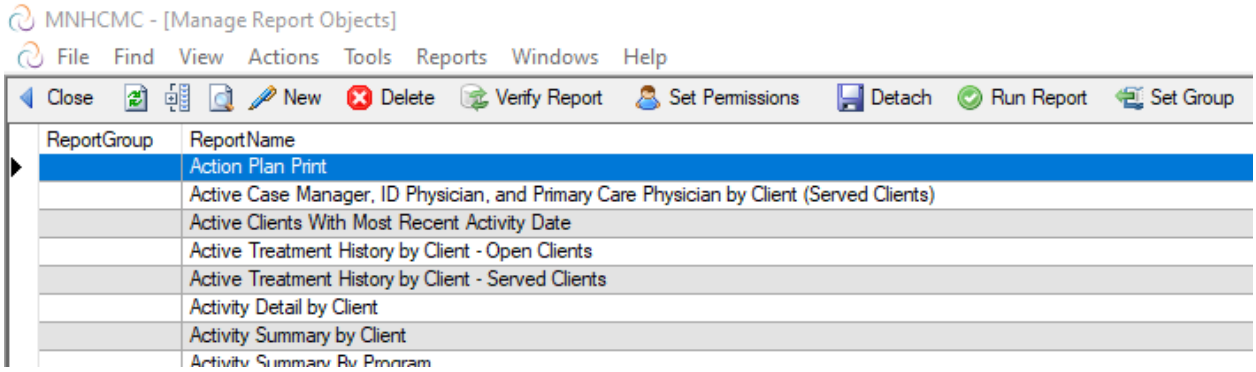
- In the large query window, enter your SQL Query.
- On the right hand of dialog click 'Create' to create a parameter if you wish to use one within your query.
- If using a parameter, simply double Click on the Parameter to add it to the SQL Query Box in the position you want it used in your query.
- Click 'OK'.
    - There will be a Command table under the Database Field section that contains all the fields returned by the query entered above. These fields can be used on the report and the Command can be used just like a view. Other views can be Joined to it if additional information is needed.



Managing Crystal Report Objects in Provide Enterprise

Managing Report Objects is generally a task reserved for System Administrators to maintain reports that will be available for use throughout the Provide Enterprise system. To do this, follow the steps below:

Select the “Reports – Manage Report Objects” to open the report objects management screen.

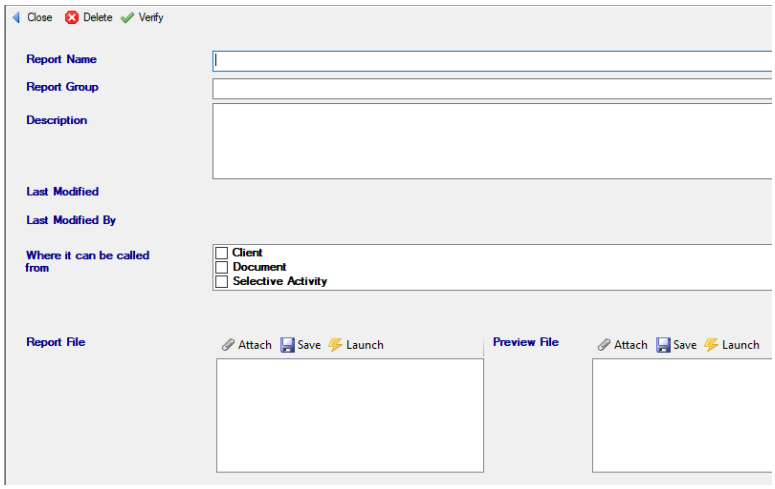


Adding a New Report Object

To add a new report object, follow the steps below:

Click on the

button. You will then see a screen similar to the one below:



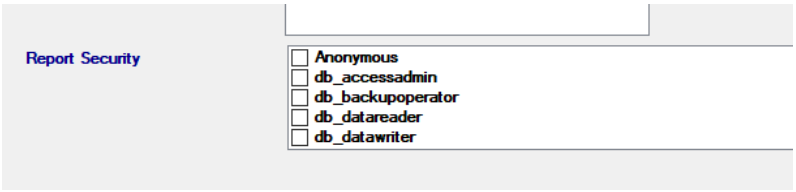
Enter the fields as appropriate:

- Report Name: This will be the name that will show in user's screens when they select Reports - Run.
- Report Group: The Group can be used to categorize reports which will help display similar reports together in the Reports - Run menu.
- Where it Can Be Called From: Select where the report can be run from. NOTE: Selective Activity is a legacy value that is no longer being used.
- Report File: Attach the report file by browsing and selecting it with the

button.
- Preview File: You can also attach a preview copy of the report (for example, in a pdf format) that users can view prior to running the report. This is done also by selecting the

button.

If the report is set to be run from a Client or is a Stand Alone report, a Report Security section, similar to that in the figure below will appear.



- Select the Security Role(s) that will be allowed to run the report. If you leave this field blank, the report will not be able to be run from within Provide Enterprise.

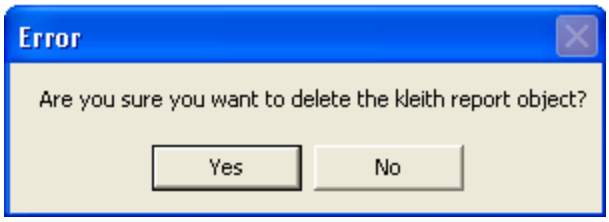
Once done, click the Close button to save your changes. The system will do a full "Verify" of the report object during this save to ensure that all tables and fields within the report are still available within the database.

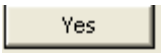
Deleting a Report Object

If you wish to delete a report object from the database, follow the steps below:

- From the view of Report Objects (Reports – Manage Report Objects) single click on the report you wish to delete. (Or, you can double click on the report you wish to delete).
- Click on the

button.
- A message similar to that below will appear:



- If you wish to delete the report, click on the 

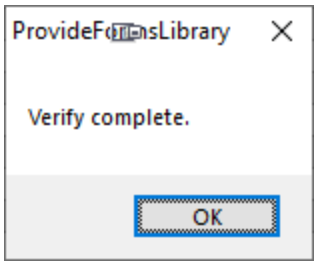
button.
- The report will be permanently deleted from the system.

Verifying a Report Object

If you wish to verify a report object within the database, follow the steps below:

- Select the report from the Manage Report Objects menu.
- Click the

button.
- As the report is verified, your Provide Enterprise will be inaccessible. This shouldn't take more than a few moments.
- Once complete, you will get a message similar to that below:



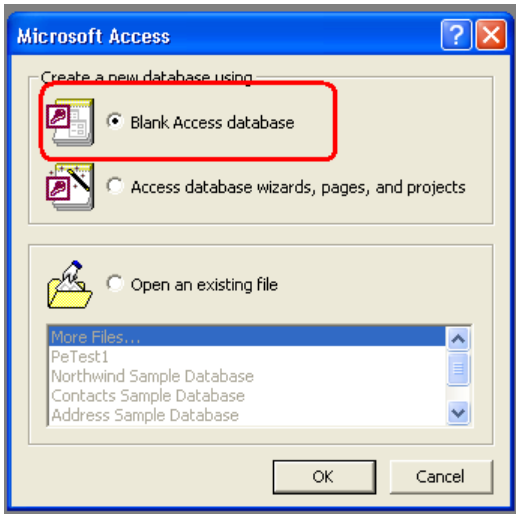
Chapter 6: Using Microsoft Access for Reporting

Microsoft Access can be used to access the underlying data in Provide® Enterprise. Once you have linked to the underlying data, you can create specific reports using Access. NOTE: This chapter is meant only to show you the steps to link to the data in Provide® Enterprise using Access. It assumes that you have a basic understanding of how to use Access. The screenshots may be out of date, depending on the version of Access you have available.

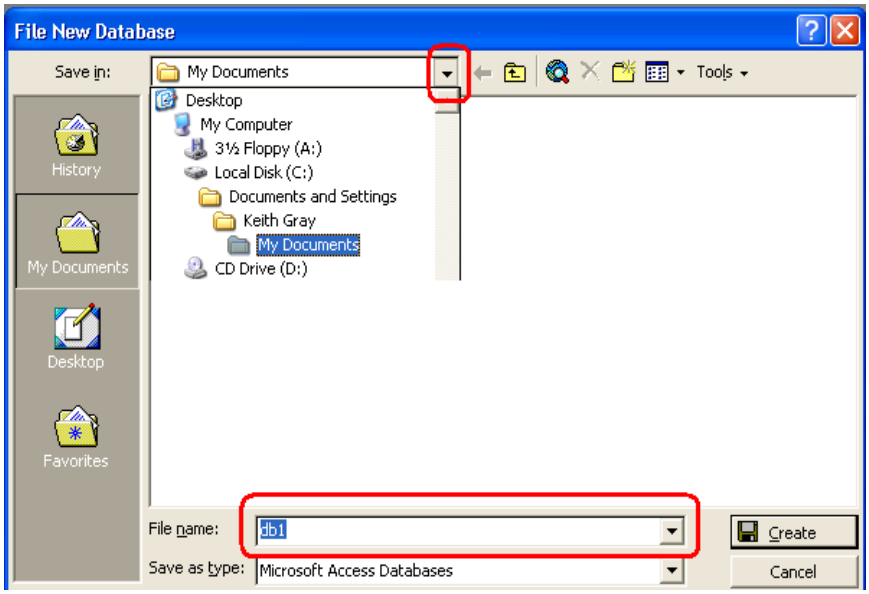
Linking to Provide Enterprise Data from within Access

To create a link to the Provide® Enterprise database from within Microsoft Access, follow the steps below:

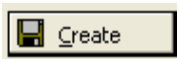
Open Microsoft Access. You will probably get the new database/open database dialog box similar to that in the figure below:

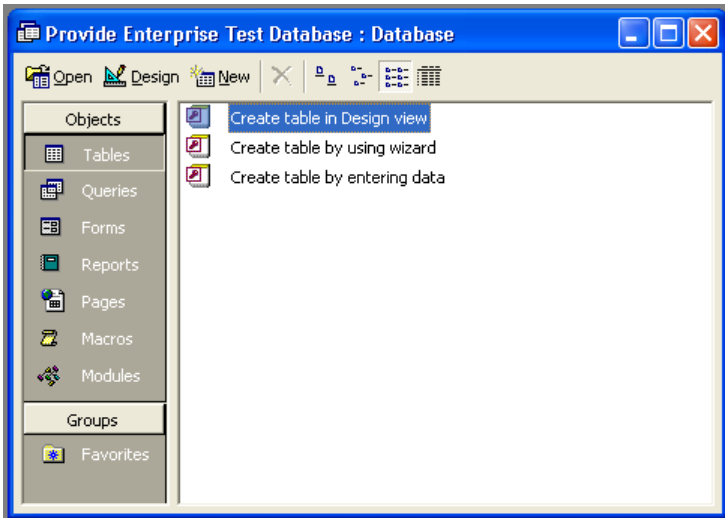


Select "Blank Access database" and click on the button. A dialog box similar to the one below will appear:

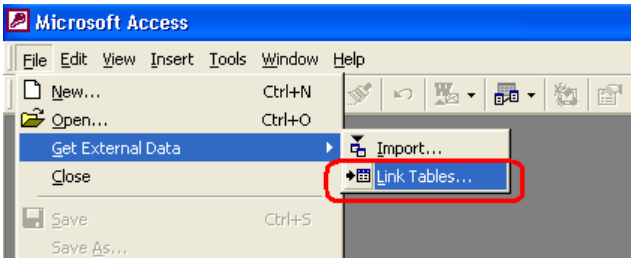


Click on the next to the "Save In" prompt to navigate to the drive and/or folder that you want to save your database in.

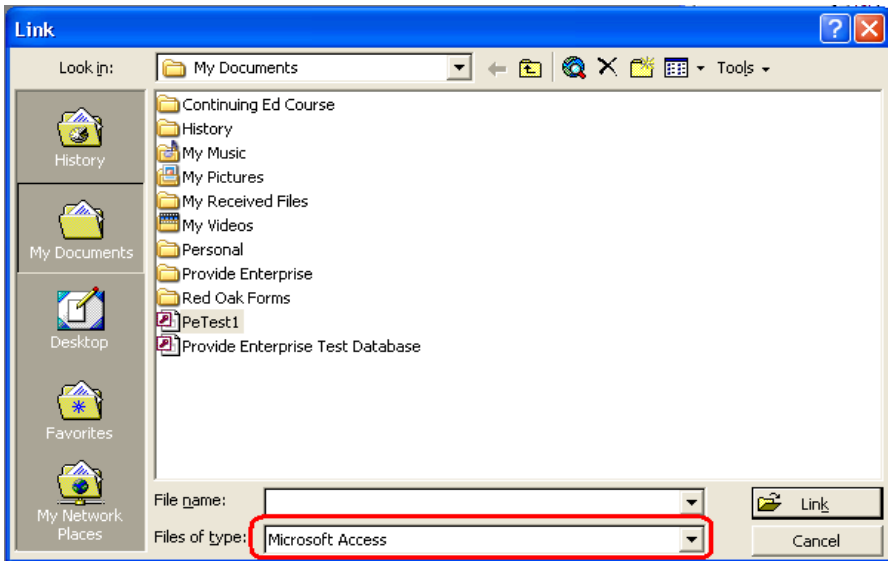
Type in the name that you want to give your database and then click on the  button. The Access navigation tool, similar to that in the figure below, will appear.



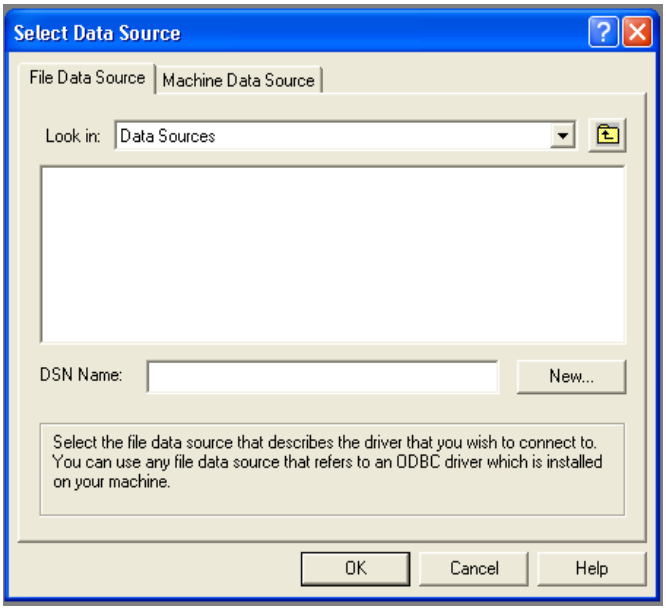
Next, you want to create the link to the Provide® Enterprise SQL database.
From the Windows Toolbar, select "File – Get External Data -Link Tables, seen in the figure below.



The “Link” window will open, similar to that in the figure below:



Under “Files of type:”, select “ODBC Databases”. The “Select Data Source” window, similar to the one below will open:



Chapter 7: Functional Area Views and Tables

This chapter will call out some important views for various functional areas of Provide Enterprise for the State of Virginia.

Care Services and VA MAP

- Client Views
    - Client Profile
    - Client Profile Flat Export - everything in the Client Profile, but flattened (meaning all multi-select values have their own columns)
    - Client Matrix View - similar to the above flat export, fewer columns
    - Client Service Profile - helps determine what agencies are serving a client
    - Informed Consent
    - Test Result
- Eligibility Related Views
    - Eligibility Assessment
    - Eligibility History
    - Health Benefits
    - Income History
    - Address
    - HIV History
- Care Services Service Related Views
    - Service Activity Dynamic: This view normalizes all of the various types of service activity records into one view for ease of reporting.
    - RSR 2020 Services: This is the view that creates the mapping of services into the RSR specific service categories and helps determine which services (and thus, which clients) should be included in the RSR.
    - Service Provided
- ADAP Specific Views
    - ADAP Medication Assistance Enrollment

    - ADAP Premium Assistance Enrollment
    - Seamless Enrollment
- ADAP Specific Service Views
    - Premium Payments
    - ADAP Prescription Dispense
    - ADAP PBM Transaction
    - ADR 2021 Copay Deductible: Mapping of the ADAP PBM Transactions into ADR categories.
    - ADR 2021 Medications: Mapping of the ADAP PBM Transactions into the medication level detail required for ADR.
    - ADR 2021 Premium: Mapping of Premium Payments into the categories required for the ADR
- Current State Views
    - Views that start with CSMR are the current state (meaning they only contain the most recent record(s).

Status Neutral

- Client Views
    - Client Profile
    - Client Profile Flat Export - everything in the Client Profile, but flattened (meaning all multi-select values have their own columns)
    - Client Matrix View - similar to the above flat export, fewer columns
    - Client Service Profile - helps determine what agencies are serving a client
    - Informed Consent
    - Test Result
- Program Documentation:
    - Status Neutral Intake - form that is used to collect high-level client information in order to enroll a client into Status Neutral.
    - Status Neutral Enrollment
- Services
    - Status Neutral Encounter - unlike Care Services (which uses Service Provided records), Status Neutral documents all services as Status Neutral Encounters.

PrEP

- Client Views
    - Client Profile
    - Client Profile Flat Export - everything in the Client Profile, but flattened (meaning all multi-select values have their own columns)
    - Client Matrix View - similar to the above flat export, fewer columns
    - Client Service Profile - helps determine what agencies are serving a client
    - Informed Consent
    - Test Result
- PrEP Application - form collects information used to approve a client into PrEP.
- PrEP Application Flat Export - special view that was created to have separate columns for all multi-select value fields.
- PrEP Medication Assistance Enrollment
- PrEP Medication Assistance Withdrawal
- PrEP Prescription Dispense

Data to Care

- Data to Care Import
    - The import record documents all the known information on the case and is assigned to agencies to investigate. The final outcome is documented on this form.
- Data to Care Note - used to document contact attempts by the investigator working the case.

CHARLI Case Management

- Client Views
    - Client Profile
    - Client Profile Flat Export - everything in the Client Profile, but flattened (meaning all multi-select values have their own columns)
    - Client Matrix View - similar to the above flat export, fewer columns
    - Client Service Profile - helps determine what agencies are serving a client
    - Informed Consent
    - Test Result
- Program Documentation:

    - CHARLI Enrollment
    - CHARLI Note
    - CHARLI Tracking
- Services:
    - Service Provided