Release

5.1

GROUPWARE TECHNOLOGIES, INC.

Provide® Enterprise System Administration

System Administration Guide

Provide® Enterprise

System Administration Guide

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Chapter 1

Introduction

The Provide® Enterprise (PE) software system is an application designed to assist health and social services staff and agencies to deliver, track and coordinate care and support for the Clients they serve. This manual is designed to help those individuals that are responsible for managing and administering the PE system.

The PE system is a Microsoft SQL Server based application. SQL is a server-based database, while End Users utilize the PE Client to access information stored on the SQL server. To properly administer the PE system it is also important that the Administrator have a clear understanding of how PE is being used at their organization and how it is linked to other agencies within their PE Care Community.

There are a few requirements in order to use the PE system. Every installation of PE needs a SQL server to store the PE databases. If you have an existing 2008 or 2014 Standard or Data Center Edition of SQL server, you can use it. Another option is to purchase the SQL software and load the software on a new or existing server computer. See www.microsoft.com for the latest information on supported server operating system platforms. Finally, you could elect to have GTI act as an Application Service Provider and store all your data on one of our SQL servers. Additionally, everyone in your agency that requires access to PE databases needs the PE Client software installed on their workstations. The only operating systems supported are the professional versions of Windows 2000, Windows XP Professional, Windows 7, and Windows 8.

For every "PE Server" you must have a PE Annual Server license.

For every "Registered PE User" you must have a PE Client License. A "Registered PE User" is any person who must be defined to the PE system uniquely (i.e., each Case Manager or Case Manager Supervisor would typically be a "Registered PE User"). However, you may set up a "pooled PC" that a group of people may share and they may all be defined to the system as "Case Manager A" or "Volunteer B" and they could all share a single PE license. This is probably not useful for Case Managers but might be for Volunteers or Administrative Assistants or Reporting Staff who may be asked to perform data entry or reporting type functions.

Before you start reading further in this manual, be sure you have read through the PE User Guide. This will give you a good background on many aspects of the PE Database including how to navigate within the database and what information is stored in each of the common views. In addition, you should review the PE Database Administration Guide for information on other administrative functions and capabilities.

NOTE: Version 5.1 of the PE Client software requires all workstations with the software to have the Microsoft .Net Framework version 4.0 installed on them and if the user wants to use the integrated Crystal Reporting features they need to have the Run Time Engine of SAP Crystal Report installed as well.

Chapter

2

Provide® Enterprise Security

The PE security system is composed of several different layers, all of which work together to provide the overall security structure of the software. The Microsoft SQL Server software delivers many of the security features in PE. The PE system, as an application running with Microsoft SQL Server, takes advantage of the capabilities that exist within SQL Server.

As you read through this document, keep in mind that PE databases are established on a Microsoft SQL Server. Access to Client data is then made available to individuals running PE Client software.

Level One: SQL Server Access

The first level of security utilized within PE consists of the SQL Server Access. SQL Server access is granted based on SQL Authentication. PE can be accessed using SQL Accounts or Windows Authenticated User Accounts defined to the SQL server.

Level Two: PE Database Access

In the PE system, End Users are never allowed to access the database tables directly. Instead, they only access views. View Queries are encrypted and are automatically re-built using the PE Administration Client when re-building the database schema. In addition, the level of access to the views is determined by the Current User Profile and the Reporting Scope of the End User that is accessing the data.

Level Three: PE User Roles

User roles are used within PE to restrict access to buttons and functions within the system. For example, if an End User has been granted the supervisory role, he/she will be able to edit other user's Progress Logs or Service Provided records. Whereas a typical End User can only edit progress logs or service provided records that they created. Thus, the User Roles have a great deal of importance when looking at the access rights to specific data within the PE system.

Below, you will find a list of all Roles built into the PE system as well as a brief explanation of what each role does.

Role Name	Role Purpose
Anonymous	All users are by default in this group. PE does not use
db_Accessadmin	Members of the db_accessadmin fixed database role can add or remove access for Windows logins, Windows groups, and SQL Server logins.
db_backupoperator	Members of the db_backupoperator fixed database role can backup the database.
db_datareader	Members of the db_datareader fixed database role can read all data from all user tables.
db_datawriter	Members of the db_datawriter fixed database role can add, delete, or change data in all user tables.
db_ddladmin	Members of the db_ddladmin fixed database role can run any Data Definition Language (DDL) command in a database.
db_denydatareader	Members of the db_denydatareader fixed database role cannot read any data in the user tables within a database.
db_denydatawriter	Members of the db_denydatawriter fixed database role cannot add, modify, or delete any data in the user tables within a database.
db_owner	Members of the db_owner fixed database role can perform all configuration and maintenance activities on the database.
db_securityadmin	Members of the db_securityadmin fixed database role can modify role membership and manage permissions.
GTI	Employees of Groupware Technologies, Inc.
Provide Master	Currently not used in PE, is a carry over from Notes
Provide. Administrators	Administrators of the PE system.
Provide.Agent.Manager	Used for accounts that run the Agents
Provide.XXXX.Editors	Allows Editing of Documents of the various references databases (i.e. Test Reference, Providers, Service Programs, etc.)
Provide.CM.Access	Allow users to Access and Edit Client, Activity documents
Provide.CM.Admin	Allow users to Access and Edit Client, Activity documents, as well as some other options that are available (Example: Delete of documents that you are not the owner)
Provide.CM.Super	Allow users to Access and Edit Client, Activity documents as well as some other options that are available (Example: Delete of documents that you are not the owner, but are still in the same org-pgm)
Provide.Manager.Sync	Allows this account to run the synchronization of date from Provide® to PE.
Provide.Manager. Version	Allows this to release a new version of the PE code to the database.

Provide.Servers	Currently not used in PE, is a carry over from Lotus Notes
Provide.Users	Allows users of the PE system to have access Select access to all the document related views that will then take there Current User profile into account when displaying data.

Level Four: User Profiles

User Profiles are the key element in PE in determining access to data within the system. Each User Profile that an End User has grants them access to the data for the associated program. The User Profiles are stored in a User's Preferences. When using the PE system, End Users can have one "Current User Profile" which will associate any data entered with that specific program. They can, however, have their "Reporting Scope" set to include any other User Profiles they have been granted. This would give them access to view data associated with the other program(s), however any data entered would be associated solely with their "Current User Profile".

Level Five: Preferences - Scope

Within an End User's User Preferences, the ability exists to view either current or retrospective data. By simply changing the field, "View Effective Date" to "Past", the End User can choose a particular data from which they wish to view data.

Server Security Settings

Communications Encryption

All communications with the SQL server are encrypted using 256 bit SSL/TLS encryption. We recommend that a public certificate be purchased and installed on your SQL Servers as an added layer of security.

Chapter

3

Understanding Document Storage

Definition of a Document

Within PE, a document is 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 PE may have a different database schema depending on customer requirements, PE 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 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 PE 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 PE.

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 Selector Description

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 defined in the Data Dictionary. Bucket Tables include tblchar_bucket, tblvarchar_bucket, tbldatetime_bucket, tblint_bucket, and tblfloat_bucket. The format of these Bucket Tables are: Character fields are limited to 7500 characters. Text fields are limited to 2GB. Normally, all Bucket Tables should be empty. If data has been stored in a field in a record and the field was deleted from the database, then the data would automatically be moved to the appropriate Bucket Table for storage. From there, the data could be purged or the fields could be added to the dictionary. If this is done, the next time a schema rebuild is done the data will be restored to the appropriate records in the appropriate tables.

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 End 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 End 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 Data 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 where 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 End User has access to see. This is done by taking the organization and program stored in the End User's current User Profile and 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 the 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

4

Maintaining System Configuration Data

This section of this guide will discuss maintenance of the base System Configuration Data, including the Data Dictionary, views and keywords. All of these tasks can be performed from within the PE Client. The Administration Client is not needed for these tasks.

Data Dictionary

Data Dictionary fields are key in the PE system. These fields define the PE data tables structure and drive the look and feel of all forms within the database.

PE allows you to add, delete or edit fields in any form in the system. In addition, you are able to create new forms custom to your system without having to complete any programming. By simply adding the new data fields appropriately to the PE Data Dictionary, they will appear in the appropriate form after the database schema has been re-built.

Once an End User has entered data in a particular field in the system, it is important not to remove the field from the system, unless you want to discard the data in these fields. Likewise, once data has been captured in records in a particular field, it is important to not make any "significant" changes to the field that would affect the data. Small changes, such as the screen prompts or display controls can be made. However, more significant changes, such as the field name or data type (varchar to datetime), could cause data to be lost.

The Data Dictionary consists of a number of items used to define the look and feel of a field and/or form. These include:

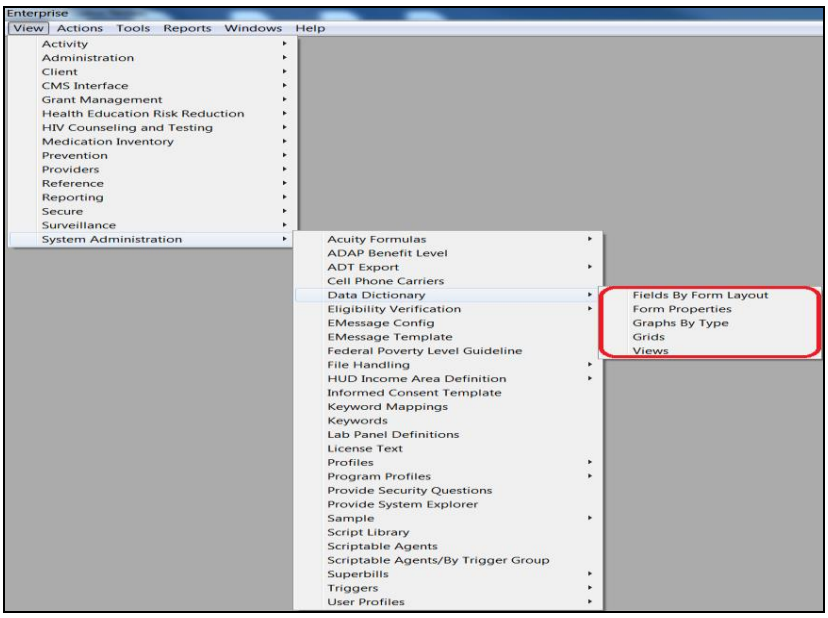
- Data Dictionary Fields
- Form Properties
- Graphs
- Grids
- Views

Data Dictionary Fields

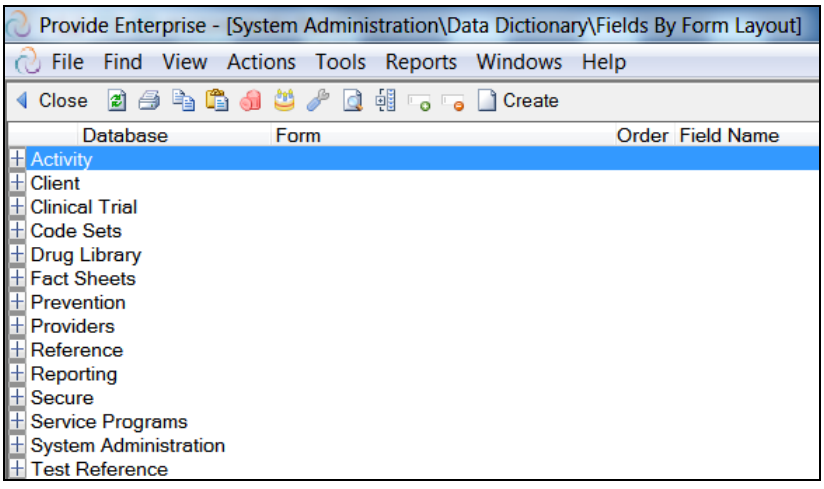
Data Dictionary Fields define and provide the layout for a given field in the PE system. A group of Data Dictionary Fields can be combined to make a "Form" in the system.

To create a new Data Dictionary Field, follow the steps below:

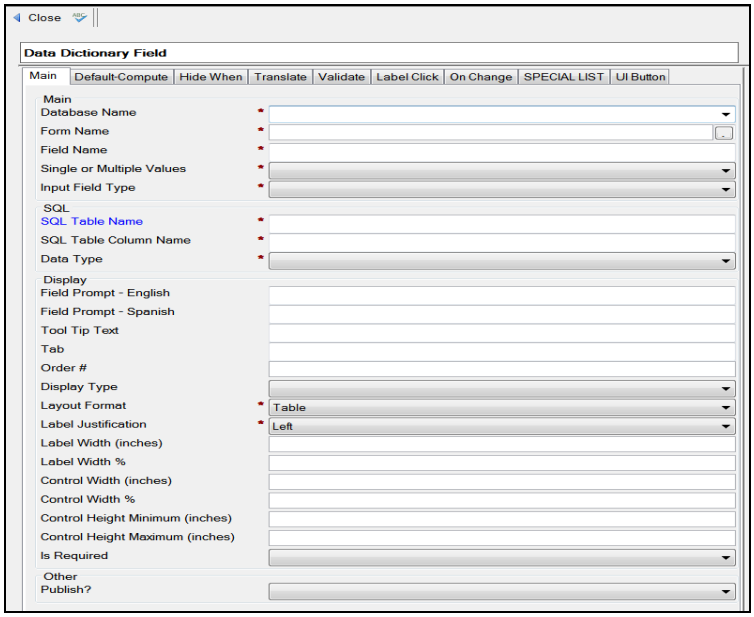
- Select on of the "System Administration – Data Dictionary – Fields…" in PE, as seen in the figure below:



- The view of Data Dictionary Field records, similar to that in the figure below will open.



- Click on the Create button to activate a blank Data Dictionary Field form, similar to that in the following figure.



You will notice that there are nine different tabs in the Data Dictionary Field form.

Fill out the fields as appropriate:

- Main Tab
  - ***Database:*** Select the "Database" that this field is going to be included in.
  - ***Form Name:*** Select the "Form Name" that this field is going to be included in.
  - ***Field Name:*** Enter the "Field Name."
  - ***Single or Multiple Values:*** Select if the field is "Single" or "Multiple Values."
  - ***Input Field Type:*** This field allows you to specify the type of the response field. Depending on the choice you make here, other fields will appear to assist you in defining the response choices.
    - Button – This will allow you to include a button as the "Control" field. Button fields should always be "Computed for Display" and, therefore, will need to include Computed Script.
    - CPT – This will activate the "CPT" selection dialog will appear, allowing a CPT Code to be entered in the field.
    - Date – A Date value must be entered in MM/DD/YYYY format
    - Drug- This will activate the "Drug" selection dialog will appear, allowing a drug to be entered in this field.
    - Facility – This will activate the "Facility" selection dialog will appear, allowing a facility to be entered into this field.

- Formula – This value should only be used for Provide®.
- ICD-9 – This will activate the "Diagnosis" selection dialog, allowing a diagnosis code to be entered in this field.
- Image – There are two different types of image fields used by PE. Dynamic Image fields will present an image field that will allow you to embed an image file into the field. Static Image fields will allow you to enter the same image that will always appear in this field. NOTE: When you select the field type of "Image" an additional field will appear to allow you to select the image that you want to use. If you do NOT enter an image in this field, the image field will be a Dynamic field.
- Individual Provider – This will activate the "Individual Provider" selection dialog, allowing for an individual provider's name to be entered.
- Keyword – Linked to a PE defined Keyword document.
- Label – This will allow you to include a label in a given record type without having a Control field. It can be used as headings or directions in a given form. NOTE: Label fields should always be "Computed for Display".
- Masked Text – A Masked Text field allows you to specify a mask that is used to restrict the input characters and make the entered text conform to a specific format. NOTE: When using the "Masked Text" value, the specific format you want to be masked should be entered in the "Text Format Field", using # signs for the characters within the mask. For example, a phone number mask field would be entered as: (###) ###-####. The "data length" should match EXACTLY the number of characters (including spaces and special characters, in order for the mask to function properly.
- Medical Group – This will activate the "Medical Group" selection dialog, allowing a medical group name to be entered.
- Name – This is used in Provide® only.
- Number – Requires a numeric value to be entered
- Service Organization – This will activate the "Service Organization" selection dialog, allowing an organization name to be entered.
- Picklist – Allows you to define here possible values within the Data Dictionary field.
- Service Program – This will activate the "Service Program" selection dialog, allowing a program name to be entered.
- Special List – This will allow you to define a collection of documents that will function as a "read only" version of a view.
- Provider – This will activate the "Providers" selection dialog, allowing you to enter an individual, service program, service organization, facility, etc. into this field.
- Report – This is used in Provide® only.

- Rich Text – An open text field.
- Test – Allows you to pick a "Test" from the Test Reference library.
- Text – An open text field.
- Time – Allows you to select a time value.
- View – Allows you to select a View in a PE database that presents the possible values.
- YesNo – Requires selection of Yes or No.

- ***SQL Table Name:*** Enter the SQL Table name that this field is associated with. NOTE: Each word of the table name should be separated using the underscore (_) in this field.
- ***SQL Table Column Name:*** Enter the Column Name. This is typically your "field" name (i.e. SCPCounty, or SCPDateofBirth).
- ***Data Type:*** Select the data type.
  - ***Binary*** -Fixed-length binary data of n bytes. n must be a value from 1 through 8,000. Storage size is n+4 bytes.
  - ***Char*** - Fixed-length non-Unicode character data with length of n bytes. n must be a value from 1 through 8,000. Storage size is n bytes. The SQL-92 synonym for char is character.
  - ***DateTime*** **–** Date or Time field.
  - ***Decimal*** - Fixed precision and scale numbers. When maximum precision is used, valid values are from - 10^38 +1 through 10^38 - 1. The SQL-92 synonyms for decimal are dec and dec(p, s).
  - ***Float*** - Is a floating point number data with the following valid values: - 1.79E + 308 through -2.23E - 308, 0 and 2.23E -308 through 1.79E + 308. n is the number of bits used to store the mantissa of the float number in scientific notation and thus dictates the precision and storage size. n must be a value from 1 through 53. The default value of n is 53.
  - ***Image*** -Variable-length binary data from 0 through 231-1 (2,147,483,647) bytes.
  - ***Int*** - Integer (whole number) data from -2^31 (-2,147,483,648) through 2^31 - 1 (2,147,483,647). Storage size is 4 bytes. The SQL-92 synonym for int is integer.
  - ***Text*** - Variable-length non-Unicode data in the code page of the server and with a maximum length of 231-1 (2,147,483,647) characters. When the server code page uses double-byte characters, the storage is still 2,147,483,647 bytes. Depending on the character string, the storage size may be less than 2,147,483,647 bytes.
  - ***Varbinary*** - Variable-length binary data of n bytes. n must be a value from 1 through 8,000. Storage size is the actual length of the data entered + 4 bytes,

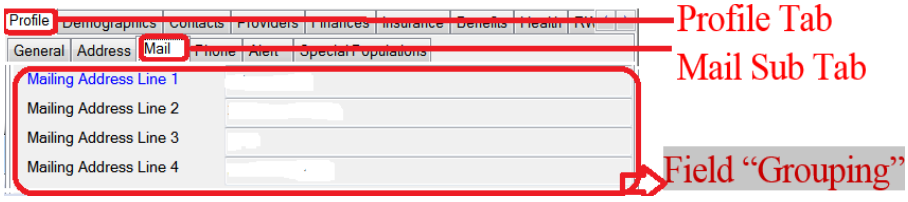
not n bytes. The data entered can be 0 bytes in length. The SQL-92 synonym for varbinary is binary varying.

- ***VarChar*** - Variable-length non-Unicode character data with length of n bytes. n must be a value from 1 through 8,000. Storage size is the actual length in bytes of the data entered, not n bytes. The data entered can be 0 characters in length. The SQL-92 synonyms for varchar are char varying or character varying.

- ***Data Length:*** This field will be hidden, depending on the "Data Type" selected. If applicable, enter the maximum number of characters that this field can contain.
- ***Field Prompt – English, Field Prompt – Spanish, Field Prompt – Other Language A, Field Prompt – Other Language B:*** Enter the field prompt in English, Spanish and/or other languages as defined by your System Administrator.
- ***Tab:*** If this assessment is going to have a multi-tabbed format, enter the tab that this field should appear on. The format should be as follows:
  - Single Row of Tabs Table/Tab/Panel
  - Two Rows of Tabs Table/Tab/Table/Tab/Panel
  - NOTE: Tables are containers for tabs. All Tabs with the same Table will be grouped together. Panels are containers for the controls on the form, their name is not all that important.
  - In addition to the Tab Format, PE allows you to "Group" fields together. To format a group, simply add the following to your tab format:
    - \[GROUP]Group Name. An example of using the Group is seen below:

      Tab Field in Data Dictionary Form:
      [TABLE]ClientProfile\[TAB]Profile\[TABLE]Profile\[TAB]Mail\[PANEL]pnlMail\[GROUP]Mailing Address

      This would make the field look like that in the figure below:



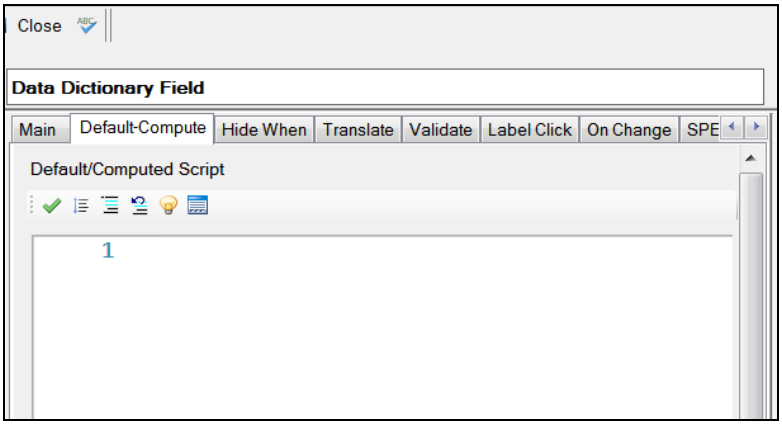
- ***Layout Formation:*** Select "Table," "Paragraph," "Stream Right," or "Stream Left."
- ***Label Justification:*** Select "Right," "Left," or "Center." Profile Tab Mail Sub Tab Field "Grouping"
- ***Display Type:***
  - ***Computed*** - This value will be computed as changes are made to the document and the value saved in the database with the document.

- ***Computed for Display*** - This value will be computed as changes are made to the document and the value will NOT be saved in the database with the document. It is only for display.
- ***Computed When Composed*** - This is similar to a default value. It will only get computed once when the document is created. It will NOT get updated as changes are made to the document. The value is saved in the database with the document.

- ***Order #:*** Enter the numeric value that this field should appear in. NOTE: The form is laid out using the numeric format in the order # field. This field defines the layout of the form. GTI suggests numbering in 5's or 10's, i.e. 5, 10, 15, 20 or 10, 20, 30, 40, so that if you wish to add other fields at a later date, there is room for the fields to be added without having to renumber a large number of fields.
- ***Display Type:***
  - ***Computed*** - This value will be computed as changes are made to the document and the value saved in the database with the document.
  - ***Computed for Display*** - This value will be computed as changes are made to the document and the value will NOT be saved in the database with the document. It is only for display.
  - ***Computed When Composed*** - This is similar to a default value. It will only get computed once when the document is created. It will NOT get updated as changes are made to the document. The value is saved in the database with the document.
- ***Layout Format***:
  - ***Paragraph –*** When choosing this format, the fields are laid out in paragraph style.(Label on top, Control below the label.)
  - ***Table –*** When choosing this style, the fields are laid out in a table format. (Label to the Left, Control to the Right of the Label).
  - ***Stream Right/Stream Left***: Currently unavailable. They will be available with future enhancements of PE.
- ***Label Width (Inches):*** Enter the width of the label (the label is the field prompt) in inches. NOTE: Label Width and Control width must add up to 6 when "Layout Format" is set to "Table". Otherwise, the Label Width can be up to 6..
- ***Control Width (Inches):*** Enter the width of the control (the control is the field that data is entered into). NOTE: Label Width and Control width must add up to 6 when "Layout Format" is set to "Table". Otherwise, the Label Width can be up to 6..
- ***Control Height Minimum:*** Enter the minimum height of the control field in inches. Common values for the Control Height Minimum include 0.2 for picklists or date fields or 0.7 for text entry (this allows for up to 3 lines of text.)
- ***Control Height Maximum:*** Enter the maximum height of the control field in inches.

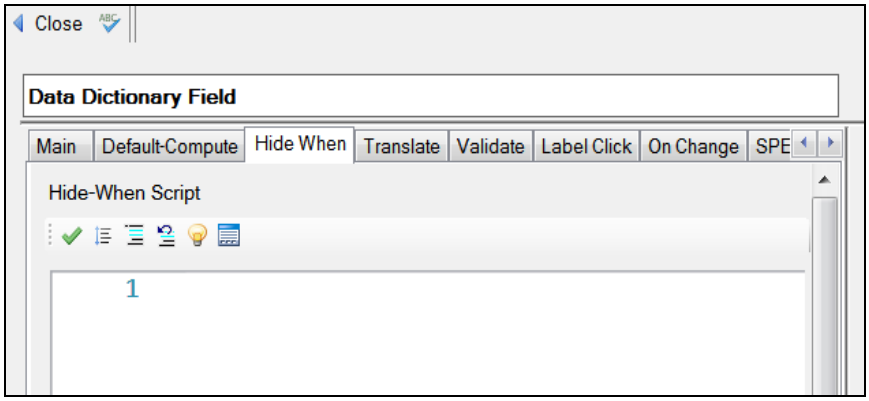
- ***Is Required:*** Select whether or not this is a field that will be required in order to save the document. Note: If the field is hidden (Hide/When formula), then the field will not be Required, even if this is set to "Yes".
- ***Number Format:*** This field will only show if the data type is one of the numeric types. Enter the format that you want the number to appear in.
- ***Date Format:*** This field will only show if the data type is set to "DateTime". Enter how you want this date field to appear in the form.
- ***Default/Computed Script:*** Enter the appropriate script, which will present a "default" value for this field. (Default Script). Enter the appropriate script, which will present a value in a Computed field. (Computed Script).

- Default-Compute Tab:



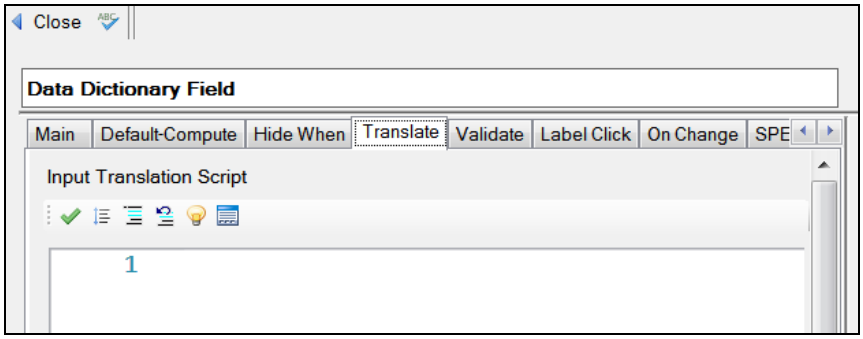
  - ***Default-Compute:*** Enter the default/compute script.

- Hide When Tab:



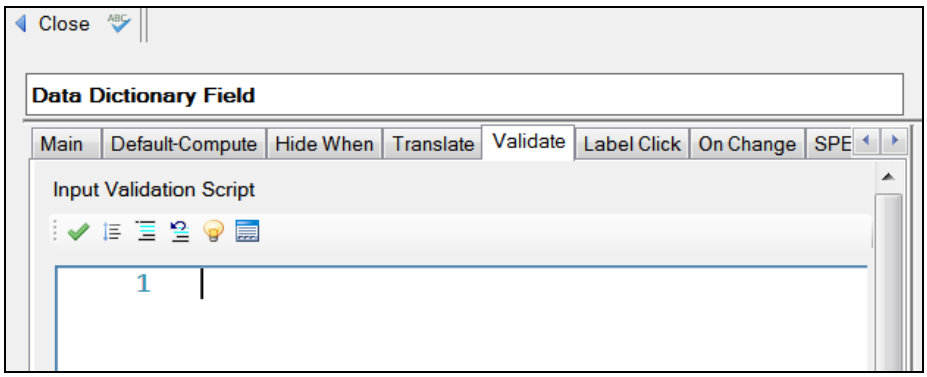
  - ***Hide/When Script:*** This script field can allow you define conditions under which the questions will be hidden (not appear) on the Assessment.

- Translate Tab:



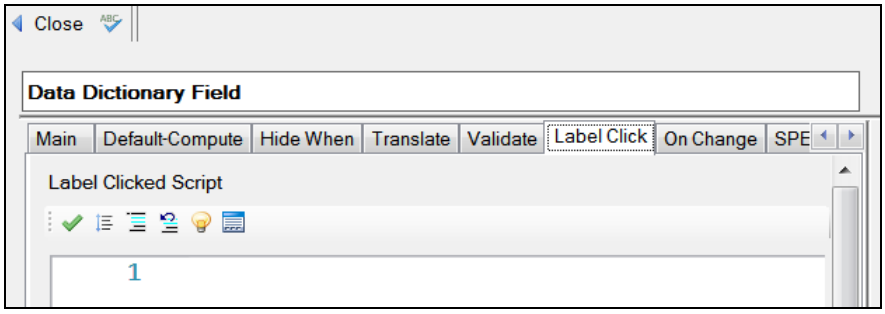
- ***Input Translation Script:*** This field specifies a formula that will translate the value that was entered into the field when the assessment is saved (optional).

- Input Validation Tab:



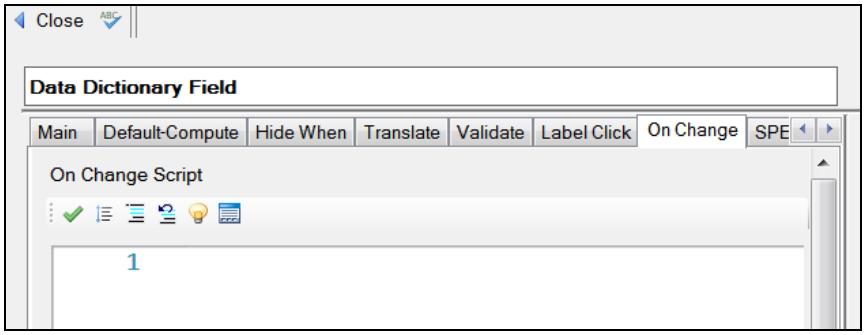
- ***Input Validation Formula****:* This field specifies a formula that validates the entered value. If the validation fails, the formula should return a descriptive message that will be displayed. The assessment will not be saved until all validations succeed.

- Label Click Tab:



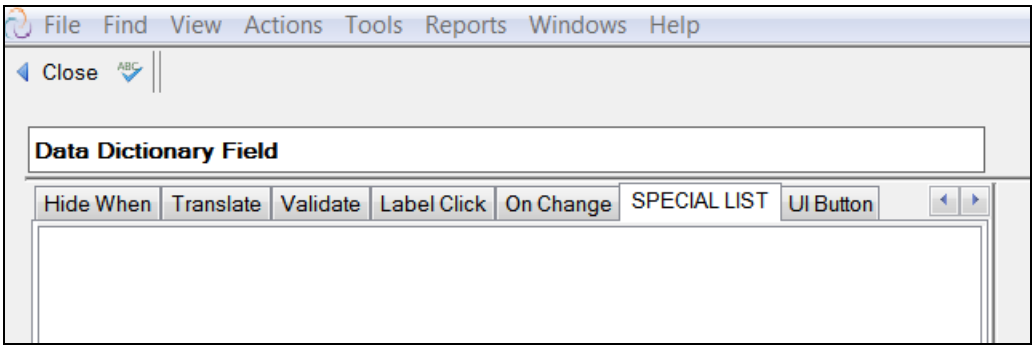
- ***Label Clicked Script:*** The label clicked script can be used to turn the label of a field on a document into a hyperlink to another document. For example, in provider relationship records you can click on the Provider Name label and it will open the provider document (Providers Database) for the provider selected**.**

- On Change Tab:



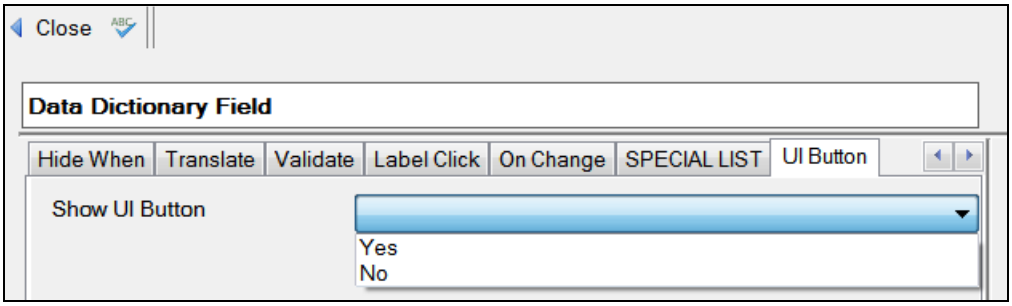
- ***On Change Script***: This script will run when the value of a field is changed
- ***Publish SQL Formula***: Enter any applicable formula for publishing this field to the Public "Published" views.

- Special List Tab:



- ***Special List Tag Conversion Script***: Enter the appropriate SQL script, which will convert the "tags" in your special list to another value.
- ***Special List Button Clicked Script***: Enter the script that should be run when a button within the Special List is clicked.
- ***Special List Item Clicked Script***: Enter the script that should be run when an item in the Special List is clicked on.

- UI Button Tab:

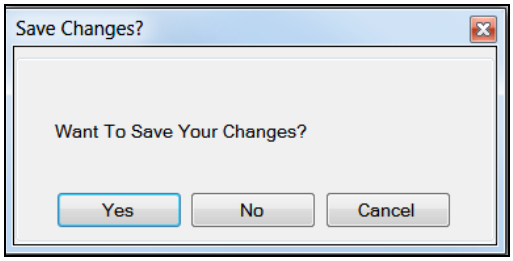


- ***Show UI Button:*** If you say "Yes" to this, a button will be available in your field. It will then run the "UI Button Clicked Script".

- ***UI Button Clicked Script:*** This field contains the script that you want to run when the UI Button is clicked.

- ***Publish SQL Formula***: Enter any applicable formula for publishing this field to the Public "Published" views.

- When you have filled out the form, click on the Close button. A prompt similar to the one below will appear:



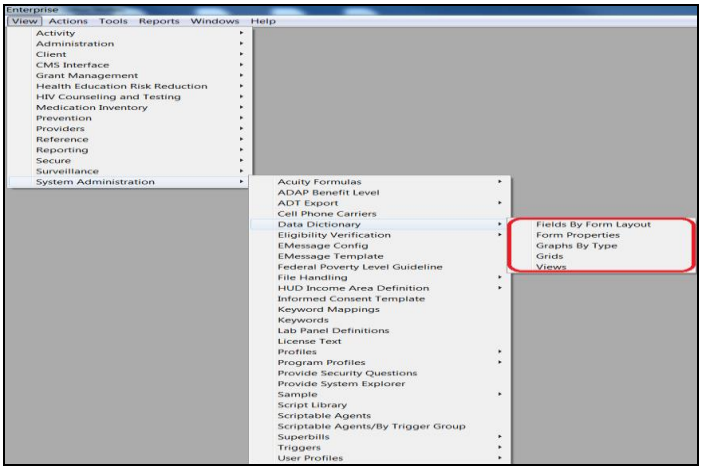
- Click the Yes to save your changes. You will be returned to the Data Dictionary view you were in.
- Click on the button to refresh the view and you should see your Data Dictionary record appear in the list.

Form Properties

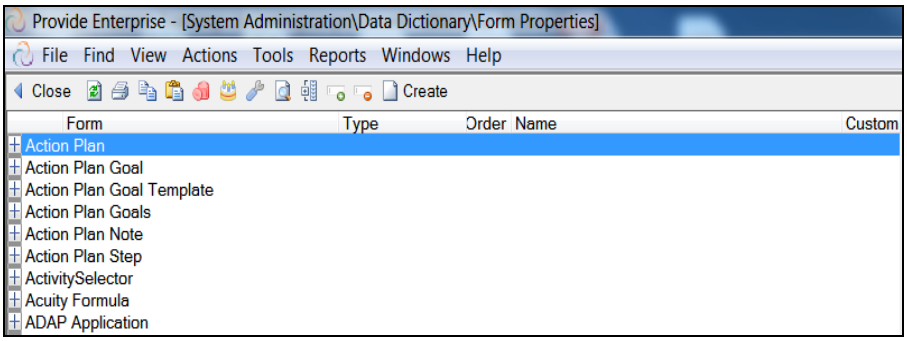
Data Dictionary Form Properties are used to define any buttons associated with a form in PE or to define scripts that will run when certain actions are completed within the system.

To create a new Form Property, follow the steps below:

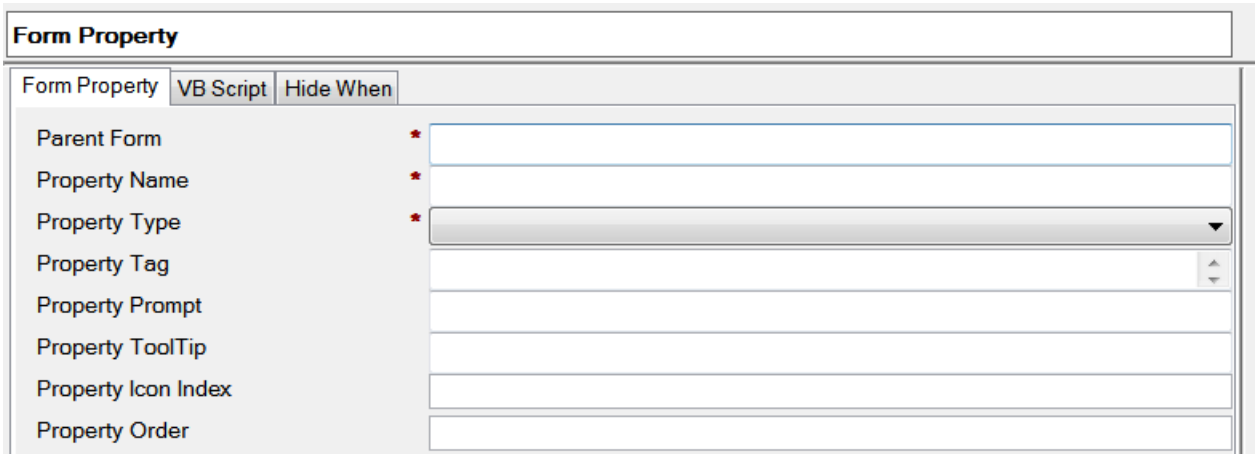
- Select the "System Administration – Data Dictionary – Form Properties" view in PE, as seen in the following figure:



- A view similar to the one below will open:

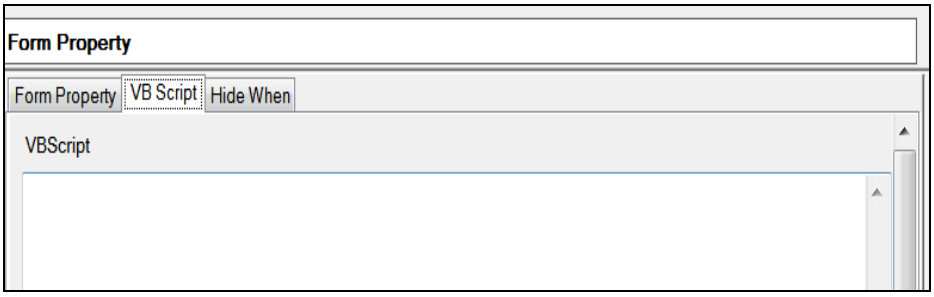


- Click on the Create button to activate a blank Form Properties record, similar to the one in the figure below.

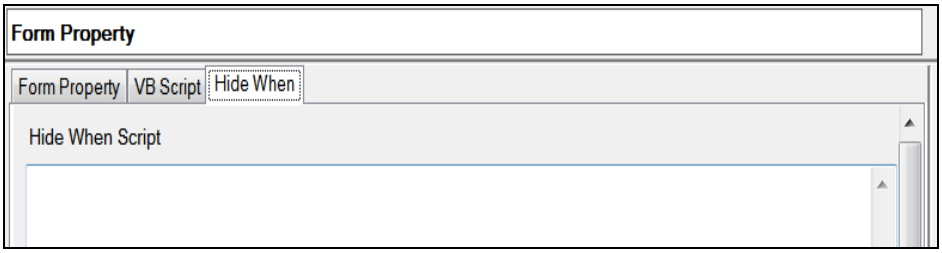


- Form Property Main Tab:
  - ***Parent Form:*** Enter the name of the form that this property should be associated with.
  - ***Property Name:*** Enter the name of this property (i.e. Edit or Delete).
  - ***Property Type:*** Select the type of property this will be.
    - Button – A Button that will appear on the associated form and will perform the function(s) listed within this Form Property.
    - PreOpen – The Script will run before the form is opened on the screen.
    - PostOpen – The script will run after the form is opened on the screen.
    - PreSave – The script will run prior to the form saving.
    - PostSave – The script will run after the form has been saved.
    - PreClose – The script will run prior to the document being closed.
    - PostClose – The script will run after the document has been closed.

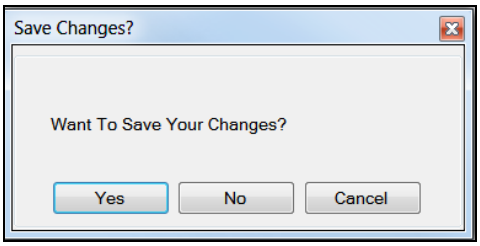
        - PreModeChange – This script will run just prior to a "mode" change in the system (i.e. going from Read Only to Edit Mode in a document).
        - PostModeChange – This script will run just after a mode change in the system.
        - SyncIgnoredFields/SyncExcludeForm – These two fields are only used in deployments that use both Provide® and PE systems and sync the data back and forth. Contact GTI for more information on using the Sync engine.
    - ***Property Tag:*** Enter the appropriate "tag" for this form property.
    - ***Property Prompt:*** If this property is a button, you can enter the text that you want to appear on the button.
    - ***Property ToolTip:*** If this property is a button, you can enter the text you want to appear as a "tip" when a user holds the cursor above the field.
    - ***Property Icon Index:*** Enter the number of the Icon you want included on this form property (if a button). You can find the Icon Index in Appendix A of this guide.
    - ***Property Order:*** Enter the numeric value that this property should appear in.
- Form Property Tab:



    - ***VBScript:*** Enter the script that should be associated with this form property.
- Hide When Tab:



    - ***Hide When Script:*** If this form property is a button and it should be hidden when certain criteria are met, enter the formula defining this here.
- When you have completed the form, click on the Close button. A prompt similar to the one below will appear:



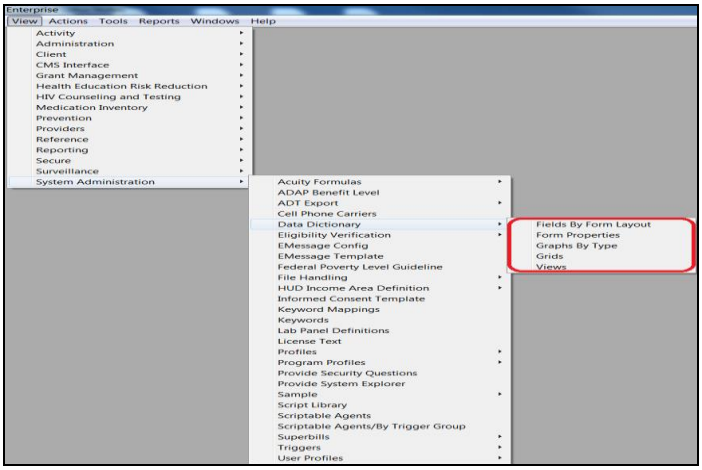
- Click the Yes to save your changes. You will be returned to the Form Properties view you were in.
- Click on the button to refresh the view and you should see your Form Property record appear in the list.

Graphs

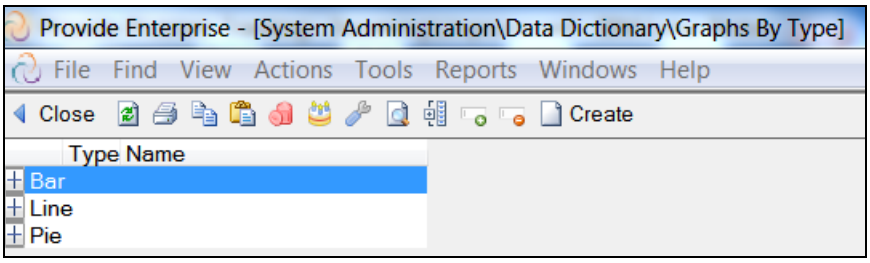
The Graph form in the Data Dictionary is used to set up the graphing function in PE. You can create an unlimited number.

To create a new Form Property, follow the steps below:

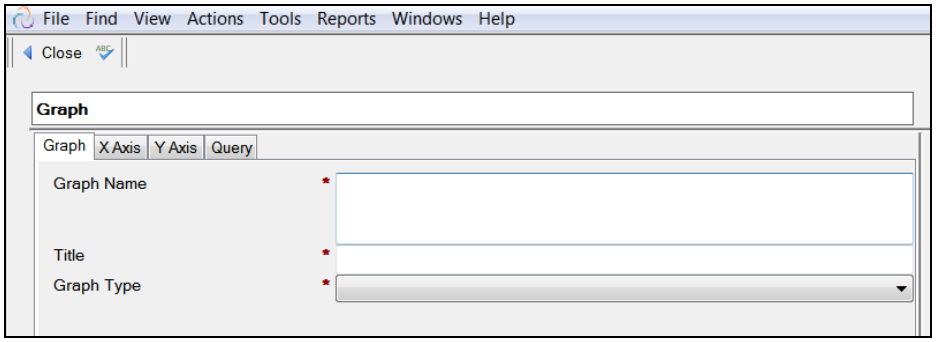
- Select the "System Administration – Data Dictionary – Graphs By Type" view in PE, as seen in the figure below:



- A view similar to the one below will open:

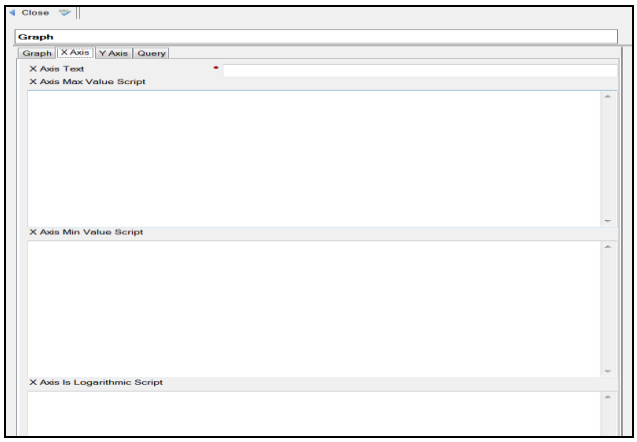


- Click on the Create button to activate a blank Graph record, similar to the one in the figure below.

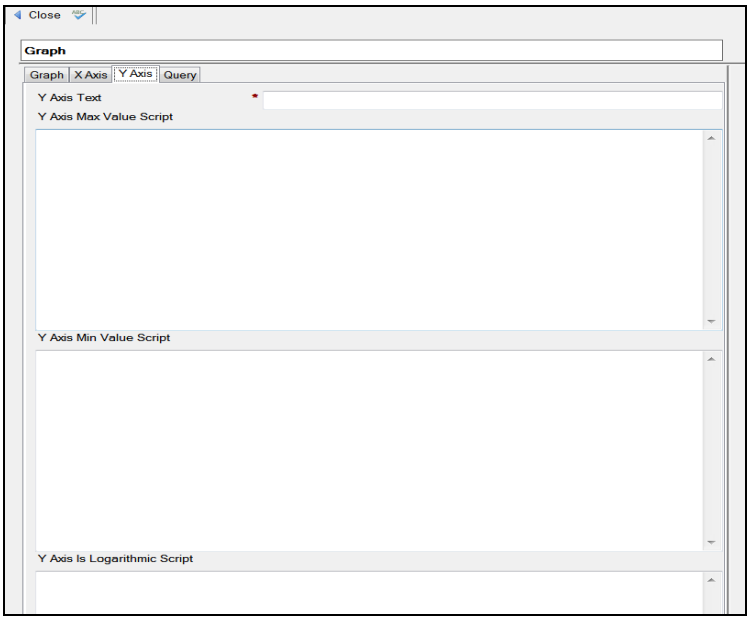


Fill out the fields as appropriate.

- Graph Main Tab:
  - ***Graph Name:*** Enter the name you want this graph saved as.
  - ***Title:*** Enter the title you wish to appear on your graph when it is created.
  - ***Graph Type:*** Select whether this will be a pie, bar, or line graph.
- X- Axis Tab:

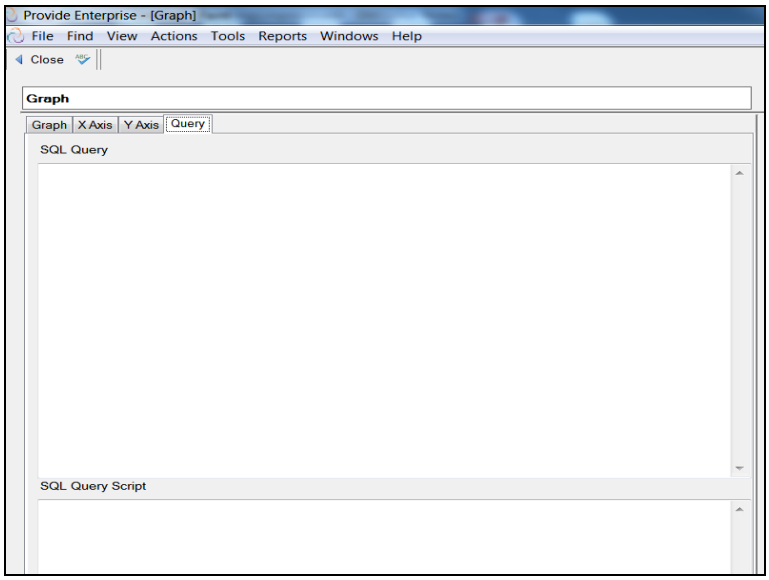


  - ***X Axis Text:*** Enter the label you want to give to the X Axis.
  - ***X Axis Max Value Script/X Axis Min Value Script:*** Enter a script to determine the maximum and minimum values for the X Axis.
  - ***X Axis is Logarithmic Script:*** Enter a script that will result in a True/False value to determine whether or not the X Axis should be represented in a logarithmic format.
- Y- Axis Tab:



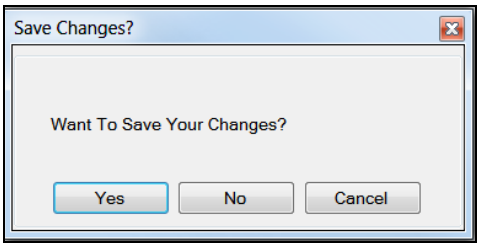
- ***Y Axis Text:*** Enter the label you want to give to the Y Axis.
- ***Y Axis Max Value Script/Y Axis Min Value Script:*** Enter a script that will determine the maximum and minimum values for the Y Axis.
- ***Y Axis is Logarithmic Script:*** Enter a script that will result in a True/False value to determine whether or not the Y Axis should be represented in a logarithmic format.

- Query Tab:



- ***SQL Query:*** Enter the Command t call the appropriate VB script that will be used in generating the graph.
- ***SQL Query Script:*** Enter the SQL Query that should run to determine the values for this graph.

- When you have completed the form, click on the Close button. A prompt similar to the one below will appear:



- Click the Yes to save your changes. You will be returned to the Graphs view you were in.
- Click on the button to refresh the view and you should see your Graph record appear in the list.

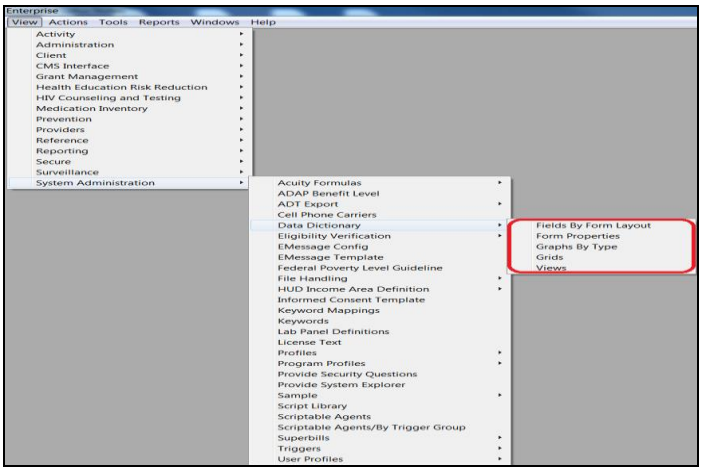
Grids

Grids are used to setup "grids" within various forms within PE. These are used for more efficient data entry. For example, when lab work is being entered for a Client, instead of entering an individual result for each test, the End User will enter a Lab Panel. The Lab Panel form contains a grid that will allow the results for a variety of tests to be entered on one form. When the document is saved, separate Test Result records are spawned to facilitate more effective data evaluation and reporting. When setting up grids, you can "spawn" a variety of documents, based on how you setup your grid.

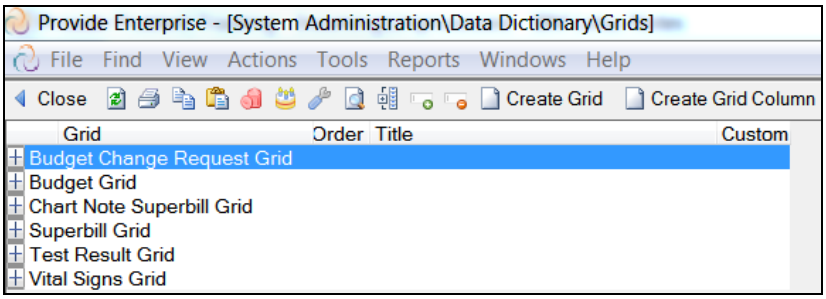
Creating the Main Grid

To create a new Grid, follow the steps below:

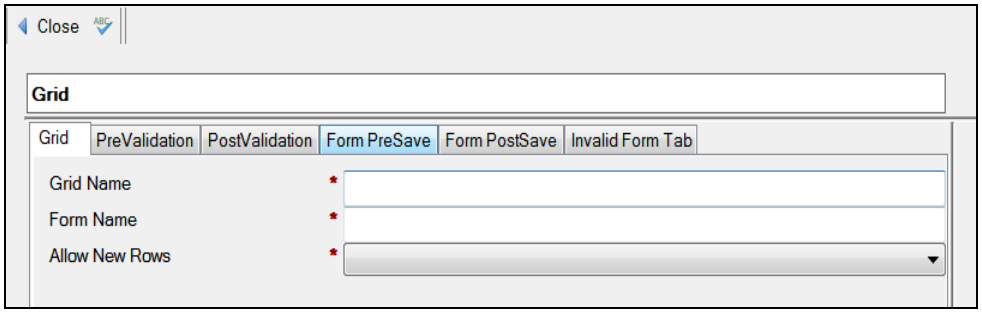
- Select the "System Administration – Data Dictionary – Grids" view in PE, as seen in the figure below:



- A view similar to the one below will open:

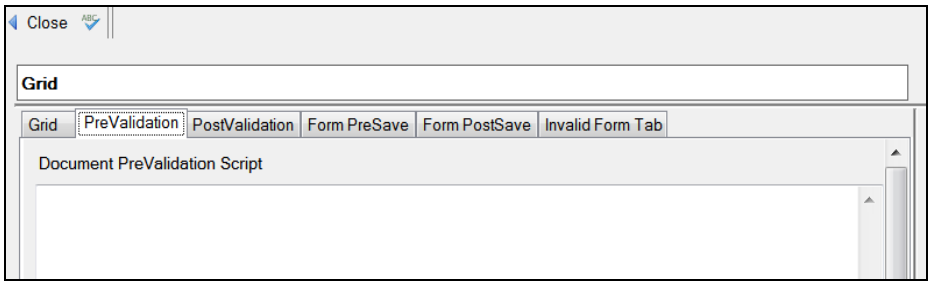


- Click on the Create Grid button to activate a blank Grid record, similar to the one in the figure below.

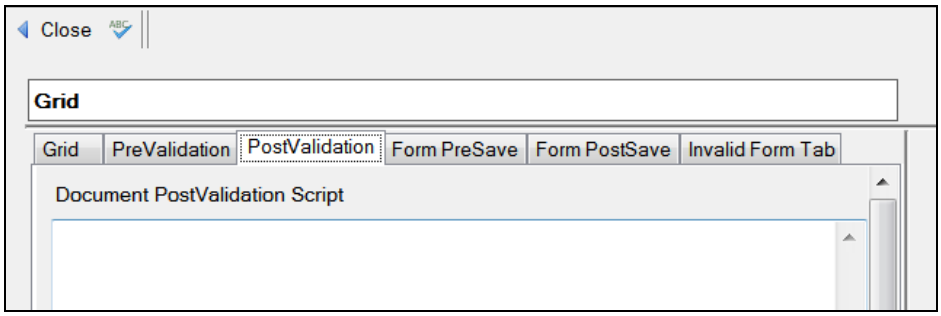


Fill out the fields as appropriate.

- Query Tab:
  - ***Grid Name:*** Enter the name you want this grid saved as.
  - ***Form Name:*** Enter the name of the form that this grid will be inserted in.
  - ***Allow New Rows:*** Select whether or not new rows can be added to the grid as you go.
- PreValidationTab:

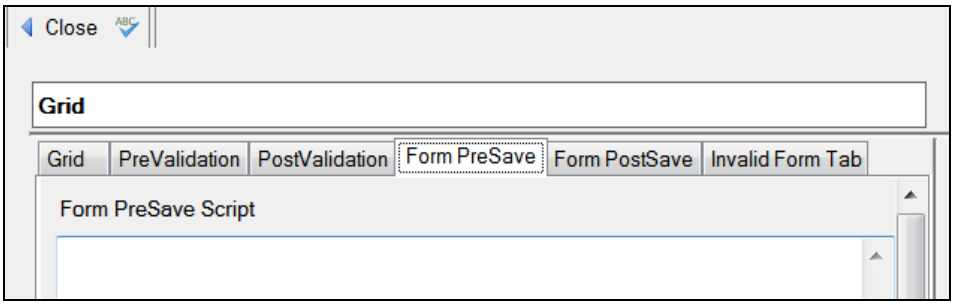


  - ***Document PreValidation Script:*** The script in this field would be run before the document is saved and would validate the document.
- PostValidationTab:



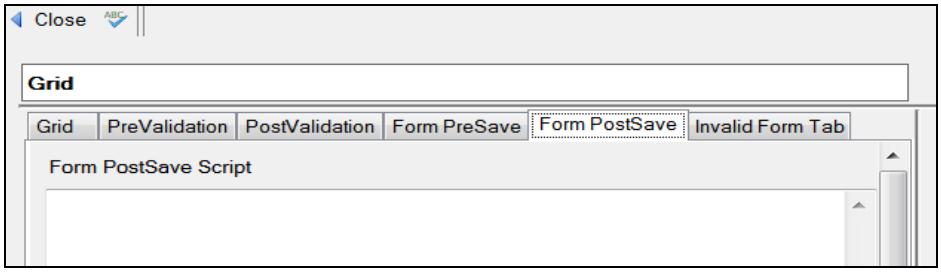
- ***Document PostValidation Script:*** The script in this field would be run before the document is saved and after validation is completed.

- Form PreSaveTab:



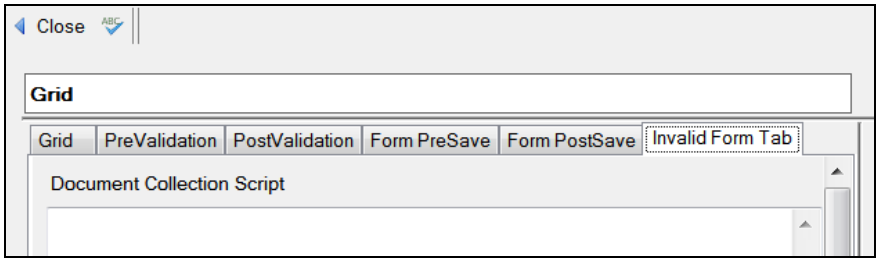
- ***Form PreSave Script:*** This script would run before the document is saved and would save all of the sub-documents that are part of the grid. For example, when this script runs in a Lab Panel, the individual Test Result records would be saved.

- Form PostSaveTab:



- ***Form PostSave Script:*** This script is run after the document is saved.

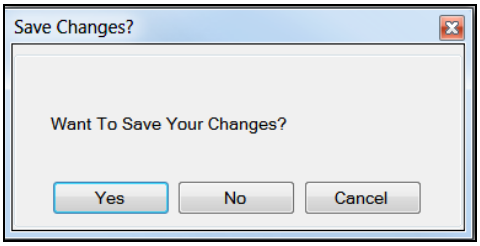
- Invalid FormTab:



- ***Document Collection Script:*** This will load the grid with documents. For example, Lab panels will pull the appropriate tests (for the selected lab panel name) and put

them in the grid. When opening an existing lab panel, this would also load the saved test results that go with the lab panel.

- When you have completed the form, click on the Close button. A prompt similar to the one below will appear:

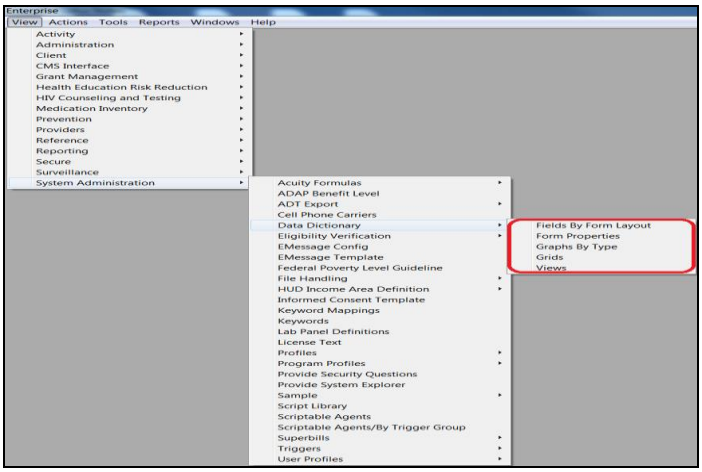


- Click the Yes to save your changes. You will be returned to the Grids view you were in.
- Click on the button to refresh the view and you should see your Grid record appear in the list.

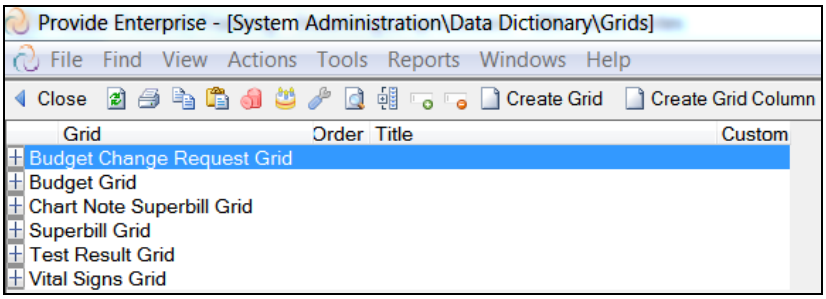
Creating Grid Columns

To create a new Grid Column, follow the steps below:

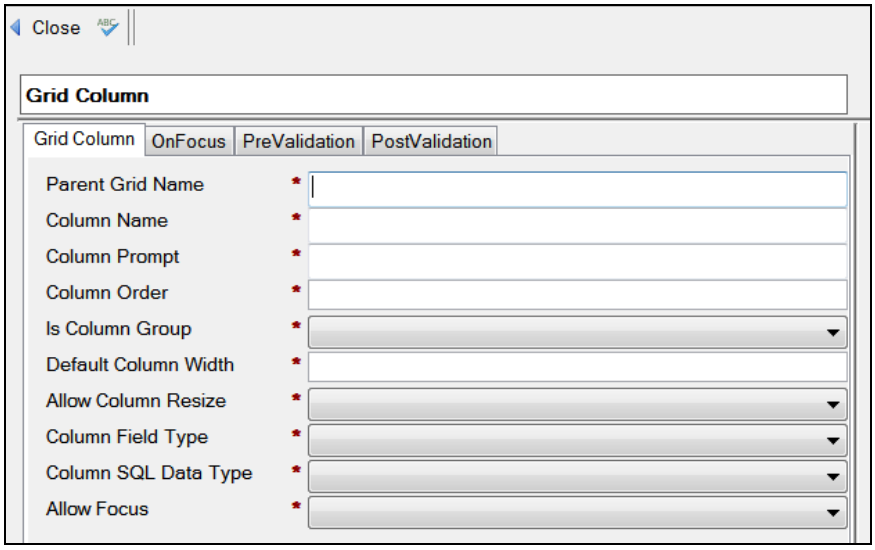
- Select the "System Administration – Data Dictionary – Grids" view in PE, as seen in the figure below:



- A view similar to the one below will open:



- Click on the Create Grid Column button to activate a blank Grid Column record, similar to the one in the figure below.

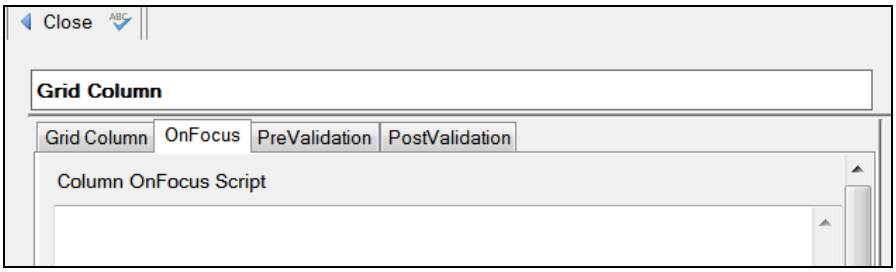


- Fill out the fields as appropriate.
- Grid Column Tab:
    - ***Parent Grid Name:*** Enter the name of the main grid that this column is associated with.
    - ***Column Name:*** The name of the column. This is what shows on the top of the column.
    - ***Column Prompt:*** Enter the label that will identify this column in the grid when an End User is doing data entry.
    - ***Column Order:*** Enter the order that this column should appear in the grid (numeric value).
    - ***Is Column Group:*** A "Yes" value will cause all the cells of a column to merge into one big cell if they have the same value.
    - ***Default Column Width:*** Enter the width of the column (numeric value) in inches.
    - ***Allow Column Resize:*** Select whether or not the End User will be able to manually resize this column in the grid.

- ***Column Field Type:*** Select the "Type" of field that this column will represent.
  - CPT – This will activate the "CPT" selection dialog will appear, allowing a CPT Code to be entered in the field.
  - Date – A Date value must be entered in MM/DD/YYYY format
  - Drug- This will activate the "Drug" selection dialog will appear, allowing a drug to be entered in this field.
  - Facility – This will activate the "Facility" selection dialog will appear, allowing a facility to be entered into this field.
  - Formula – This value should only be used for Provide®.
  - ICD-9 – This will activate the "Diagnosis" selection dialog, allowing a diagnosis code to be entered in this field.
  - Individual Provider – This will activate the "Individual Provider" selection dialog, allowing for an individual provider's name to be entered.
  - Keyword – Linked to a PE defined Keyword document.
  - Medical Group – This will activate the "Medical Group" selection dialog, allowing a medical group name to be entered.
  - Name – This is used in Provide® only.
  - Number – Requires a numeric value to be entered
  - Service Organization – This will activate the "Service Organization" selection dialog, allowing an organization name to be entered.
  - Picklist – Allows you to define here possible values within the Data Dictionary field.
  - Service Program – This will activate the "Service Program" selection dialog, allowing a program name to be entered.
  - Special List – This will allow you to define a collection of documents that will function as a "read only" version of a view.
  - Provider – This will activate the "Providers" selection dialog, allowing you to enter an individual, service program, service organization, facility, etc. into this field.
  - Report – This is used in Provide® only.
  - Rich Text – An open text field.
  - Text – An open text field.
  - Time – Allows you to select a time value.
  - View – Allows you to select a View in a PE database that presents the possible values.
  - YesNo – Requires selection of Yes or No.

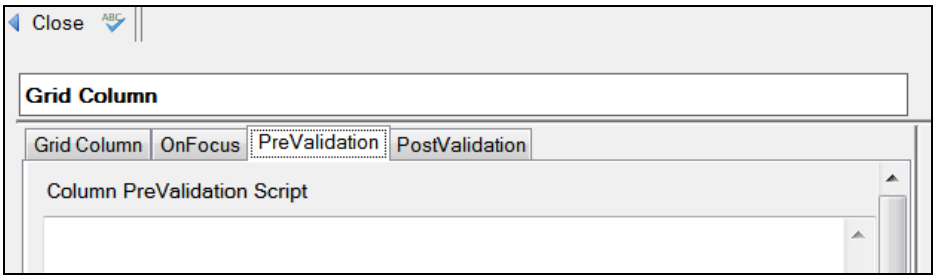
- ***Column SQL Data Type:*** Select the SQL data type for this column.
  - ***Binary*** -Fixed-length binary data of n bytes. n must be a value from 1 through 8,000. Storage size is n+4 bytes.
  - ***Char*** - Fixed-length non-Unicode character data with length of n bytes. n must be a value from 1 through 8,000. Storage size is n bytes. The SQL-92 synonym for char is character.
  - ***DateTime*** **–** Date or Time field.
  - ***Decimal*** - Fixed precision and scale numbers. When maximum precision is used, valid values are from - 10^38 +1 through 10^38 - 1. The SQL-92 synonyms for decimal are dec and dec(p, s).
  - ***Float*** - Is a floating point number data with the following valid values: - 1.79E + 308 through -2.23E - 308, 0 and 2.23E -308 through 1.79E + 308. n is the number of bits used to store the mantissa of the float number in scientific notation and thus dictates the precision and storage size. n must be a value from 1 through 53. The default value of n is 53.
  - ***Image*** -Variable-length binary data from 0 through 231-1 (2,147,483,647) bytes.
  - ***Int*** - Integer (whole number) data from -2^31 (-2,147,483,648) through 2^31 - 1 (2,147,483,647). Storage size is 4 bytes. The SQL-92 synonym for int is integer.
  - ***Text*** - Variable-length non-Unicode data in the code page of the server and with a maximum length of 231-1 (2,147,483,647) characters. When the server code page uses double-byte characters, the storage is still 2,147,483,647 bytes. Depending on the character string, the storage size may be less than 2,147,483,647 bytes.
  - ***Varbinary*** - Variable-length binary data of n bytes. n must be a value from 1 through 8,000. Storage size is the actual length of the data entered + 4 bytes, not n bytes. The data entered can be 0 bytes in length. The SQL-92 synonym for varbinary is binary varying.
  - ***VarChar*** - Variable-length non-Unicode character data with length of n bytes. n must be a value from 1 through 8,000. Storage size is the actual length in bytes of the data entered, not n bytes. The data entered can be 0 characters in length. The SQL-92 synonyms for varchar are char varying or character varying.
- ***Picklist Options:*** This field will only show if the Column Field Type is set to "Picklist".
- ***Allow Focus:*** Select whether or not this column can have the focus.

- Grid Column Tab:



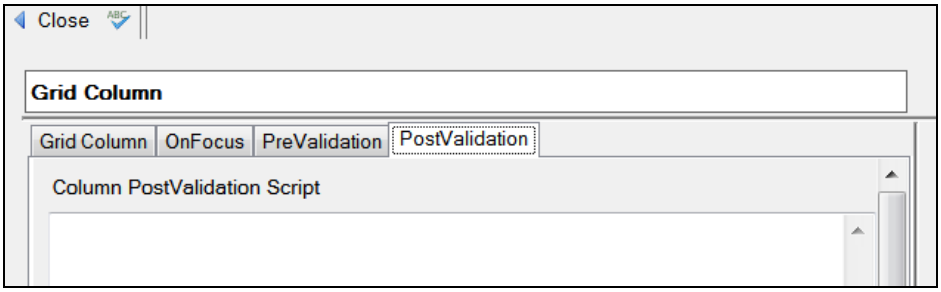
- ***Column OnFocus Script:*** This script will run when the column is given focus.

- PreValidation Tab:

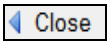


- ***Column PreValidation Script:*** This script will run to validate the value in the cell. For example, in a Lab Panel, if a test is set to have a numeric value, the validation will ensure that a numeric value has been entered in the field.

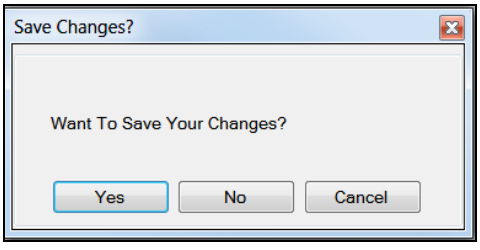
- PostValidation Tab:

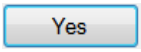


- ***Column PostValidation Script:*** This script will run after the data has been validated.

- When you have completed the form, click on the 

button. A prompt similar to the one below will appear:



- Click the 

to save your changes. You will be returned to the Grids view you were in.

- Click on the button to refresh the view and you should see your Grid Column record appear in the list.

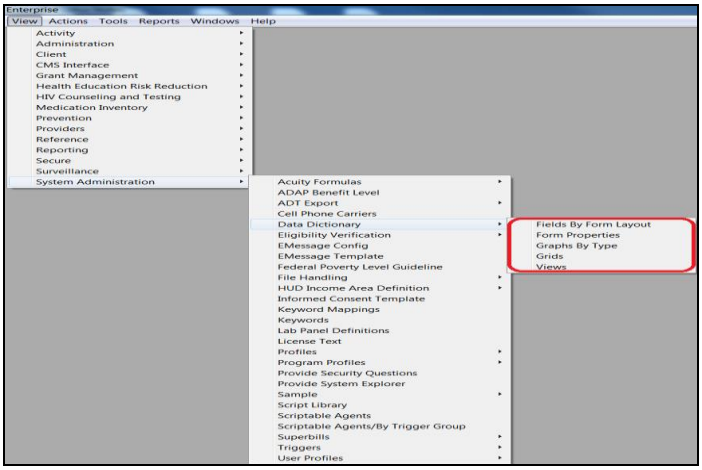
Views

Within the Data Dictionary, you can create views to be used throughout the PE system.

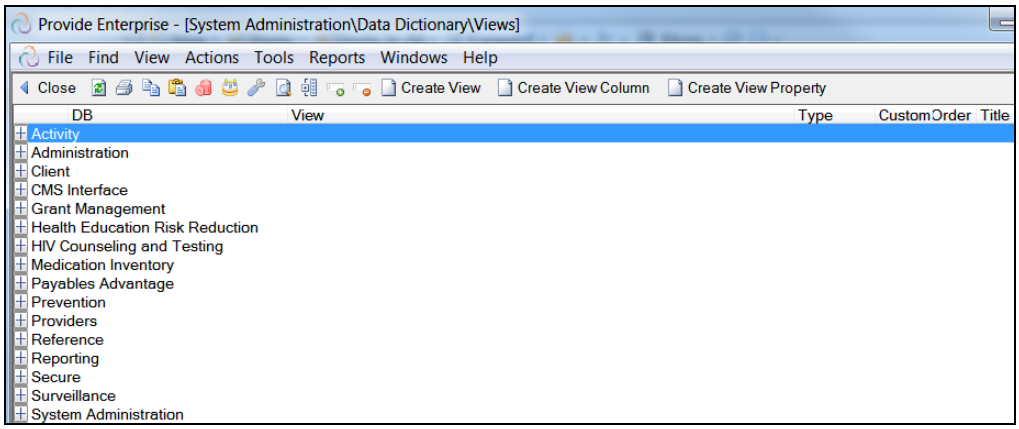
SQL View

To create a new SQL View, follow the steps below:

- Select the "System Administration – Data Dictionary – Views" view in PE, as seen in the figure below:

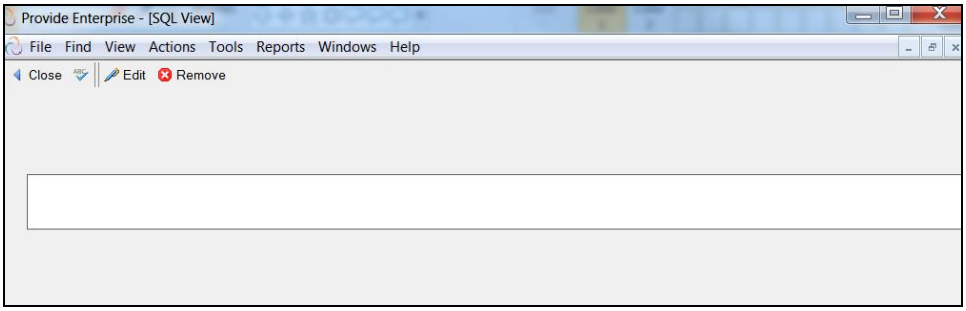


- A view similar to the one below will open:

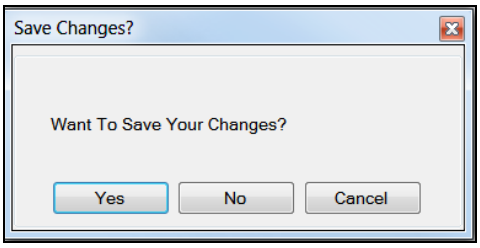


- Click on the

button to activate a blank SQL View record, similar to the one in the following figure.



- Fill out the fields as appropriate.
    - ***Query Statement:*** In the white box, write your SQL query to build the view.
- When you have completed the form, click on the Close button. A prompt similar to the one below will appear:



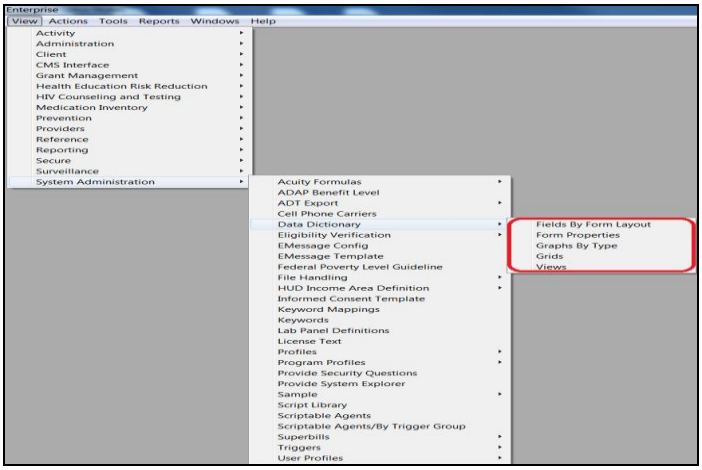
- Click the Yes to save your changes. You will be returned to the view you were in.
- Click on the button to refresh the view and you should see your View record appear in the list.

View Columns

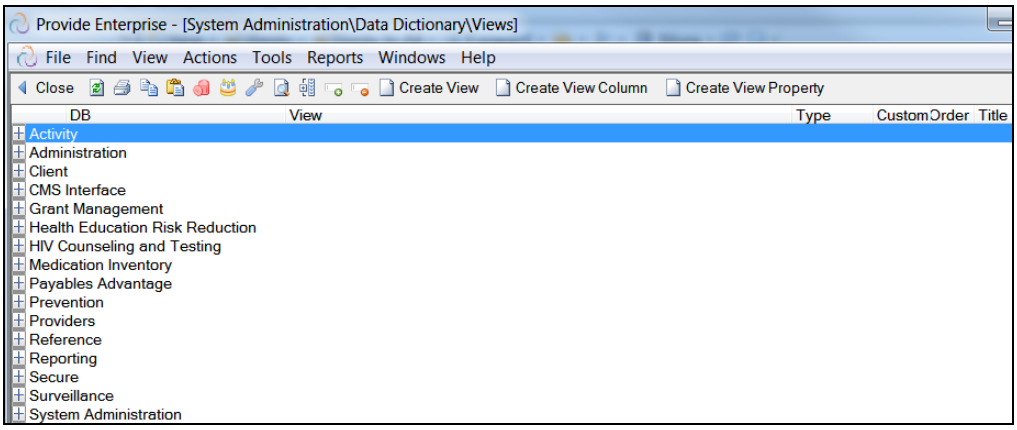
View Columns are used to define the specific columns that should be included in a view.

To create a new View Column, follow the steps below:

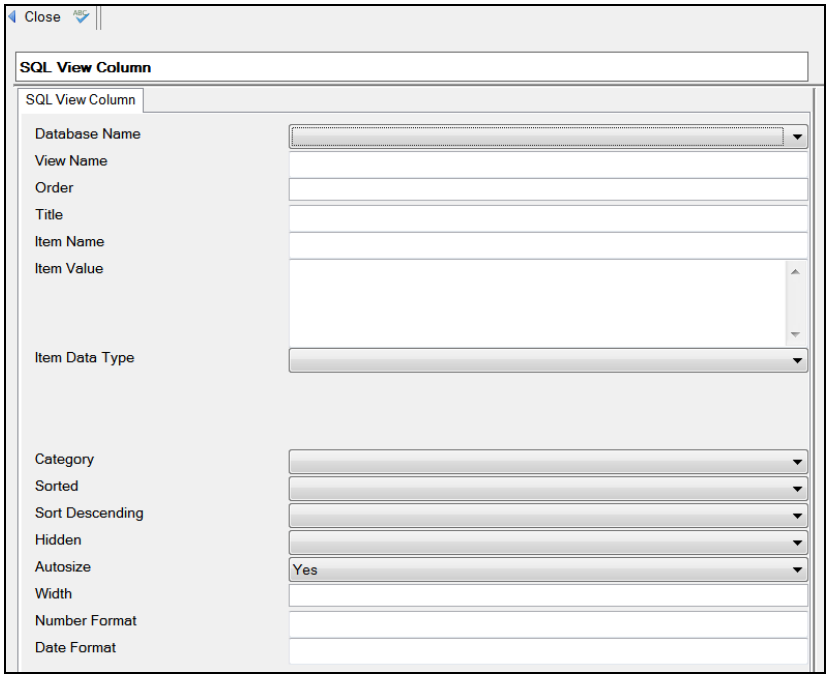
- Select the "System Administration – Data Dictionary – Views" view in PE, as seen in the following figure.



- A view similar to the one below will open:



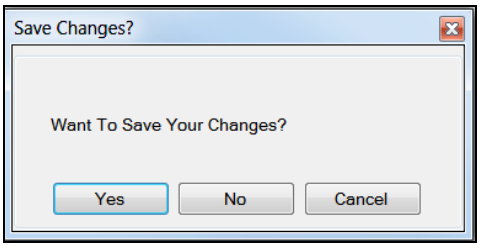
- Click on the Create View Column button to activate a blank View Column record, similar to the one in the figure below.



- Fill out the fields as appropriate.
    - ***Database Name:*** Select the "database" that this view is being built in.
    - ***View Name:*** Enter the name of the view that this column is to be included in.
    - ***Order:*** Enter a numeric value to specify in which order this column should appear in the view.
    - ***Title:*** Enter the Column Header for this specific column (i.e. for the Client's home phone number, you would enter "Home Phone".)
    - ***Item Name:*** This is the name from the SQL Query.

- ***Item Value:*** This is most often the same as the "Item Value", however a SQL statement can be included hear to return a specific value.
- ***Item Data Type:*** Select the type of data that will be displayed in this column.
- ***Category:*** Select whether or not this column should be categorized.
- ***Sorted:*** Select whether or not this column should be sorted.
- ***Sort Descending:*** Select "Yes" if this column should be sorted with descending values (i.e. if using dates, the most recent dates would show first).
- ***Hidden:*** Select whether or not this column should be hidden in the view.
- ***Width:*** Enter the width of the column (in inches).
- ***Autosize:*** Select whether or not this column should be autosized.
- ***Number Format:*** If the value presented in this column is numeric, enter the format of the numeric value.
- ***Date Format:*** If a date is presented in this column, enter how dates should be formatted in this column.

- When you have completed the form, click on the Close button. A prompt similar to the one below will appear:



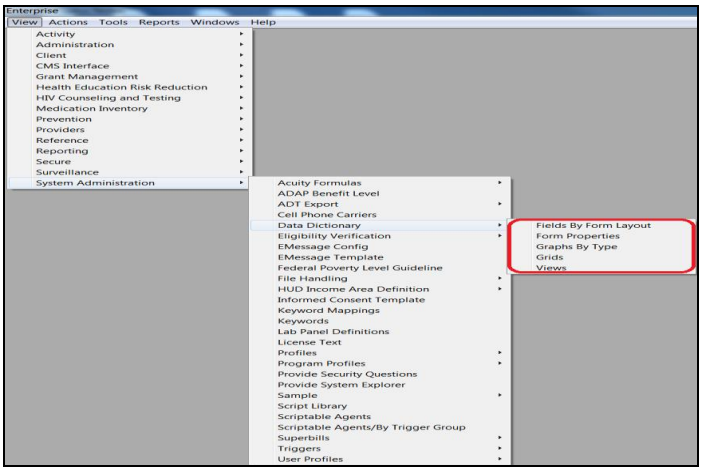
- Click the Yes to save your changes. You will be returned to the view you were in.
- Click on the button to refresh the view and you should see your View record appear in the list.

View Properties

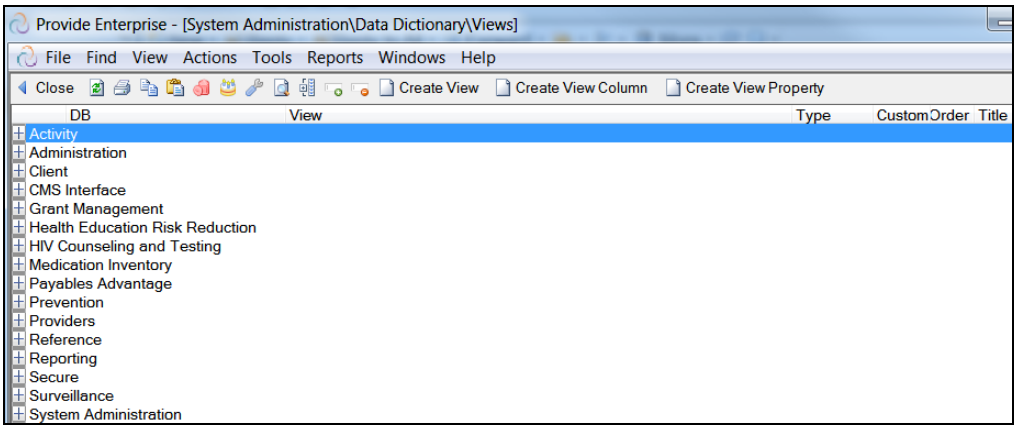
View Properties are included in a view if you wish to add a button to the view, for example, if you wanted to be able to run a report at the touch of a button from within a view, you could add this button as a view property.

To create a new View Property, follow the steps below:

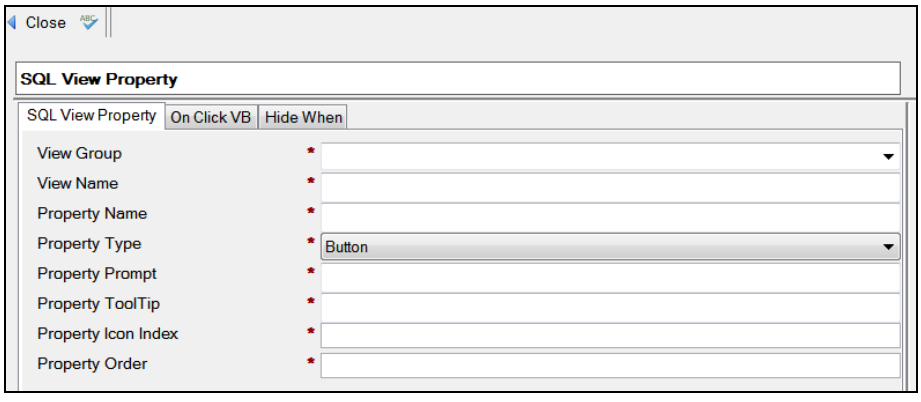
- Select the "System Administration – Data Dictionary – Views" view in PE, as seen in the figure below:



- A view similar to the one below will open:



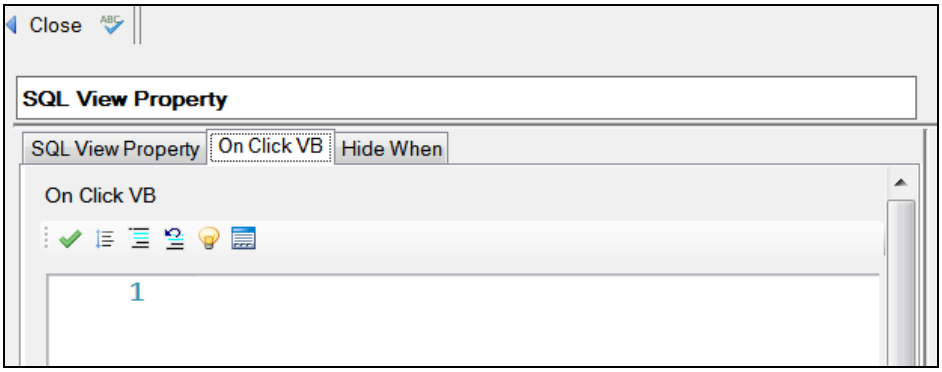
- Click on the Create View Property button to activate a blank View Property record, similar to the one in the figure below.



- Fill out the fields as appropriate.
- SQL View Property Tab:
    - ***View Group:*** Select the "database" that this view is being built in.

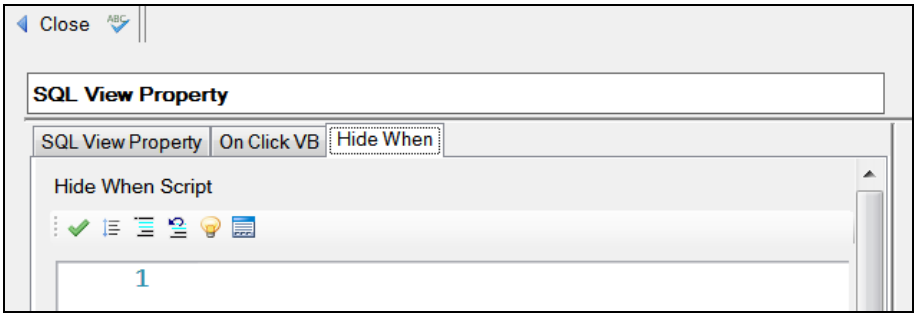
- ***View Name:*** Enter the name of the view that this property is to be included in.
- ***Property Name:*** Enter the name of the property.
- ***Property Type:*** Select "Button".
- ***Property Prompt:*** Enter the Prompt that should appear for this property.
- ***Property ToolTip:*** Enter the text that will appear on the user's screen when they "mouse over" the button.
- ***Property Icon Index:*** If you want an icon included with this property, enter the numeric value for that icon.
- ***Property Order:*** Enter the numeric value for the order that this property should appear in the view.

- On Click VB Tab:

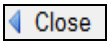


  - ***VBScript:*** Enter the script that should run when an End User clicks on the button.

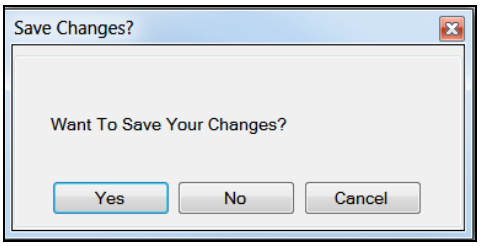
- Hide When Tab:



  - ***Hide When Script:*** If this button should be hidden when specific criteria are met (i.e. it is a button only Supervisors should be able to see), enter the script to define these conditions here.

- When you have completed the form, click on the 

button. A prompt similar to the one below will appear:



- Click the Yes to save your changes. You will be returned to the view you were in.
- Click on the button to refresh the view and you should see your view property record appear in the list.

Keywords

Keywords are predefined documents that are used in the PE system to control the available values in various fields throughout the system (primarily in the Client Profile and Client Activity records). Part of the deployment planning for each community should include a thorough review of each of the Keywords and the setting of appropriate values. Open each document in the database provided and review and update the Values field as appropriate.

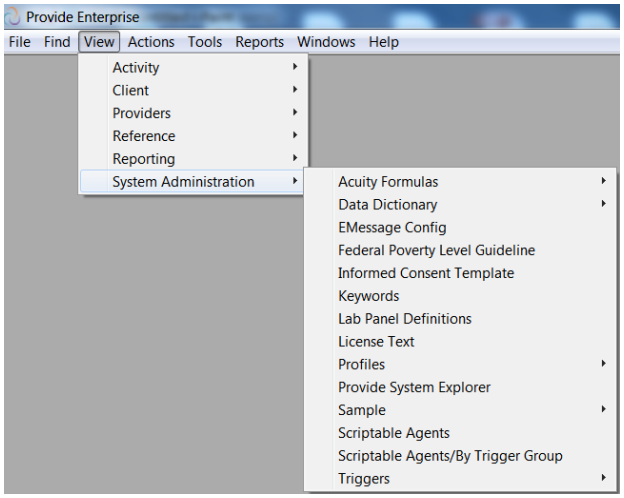
Warning: Once a Keyword document has had values defined and End Users have started to document information in the system using these values, you should not delete the values or change them. Any reports referencing these data elements will not function correctly after you have deleted or changed the values.

New Keywords

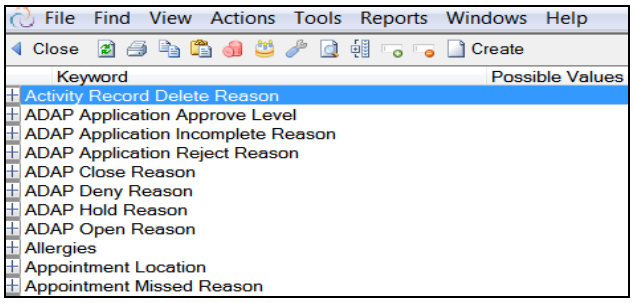
If you add new fields to your PE system, you may want to add Keywords into the system in order to standardize data entry into this field.

To create a new Keyword, follow the steps below:

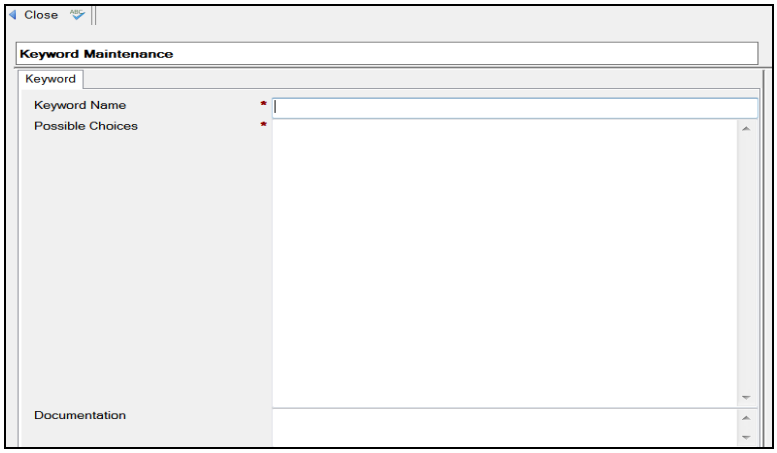
- Select the "System Administration – Keywords" view in PE, as seen in the figure below:



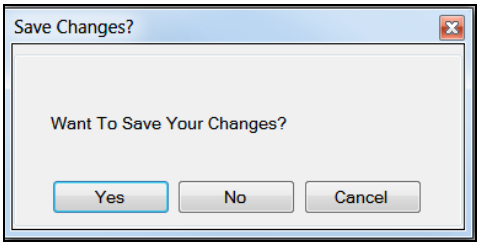
- A view similar to the one below will open:



- Click on the Create button to activate a blank Keyword record, similar to the one in the figure below.



- Fill out the fields as appropriate.
    - ***Keyword Name:*** Enter the name you want to give to this Keyword. The name is how the Keyword will be accessed by Data Dictionary fields. Be sure not to duplicate any existing Keyword Names.
    - ***Possible Choices:*** Enter the choices that should be available for this Keyword. Separate each choice with a carriage return.
    - ***Documentation:*** If you want to include detailed information on this Keyword, enter the information here.
- When you have completed the form, click on the Close button. A prompt similar to the one below will appear:

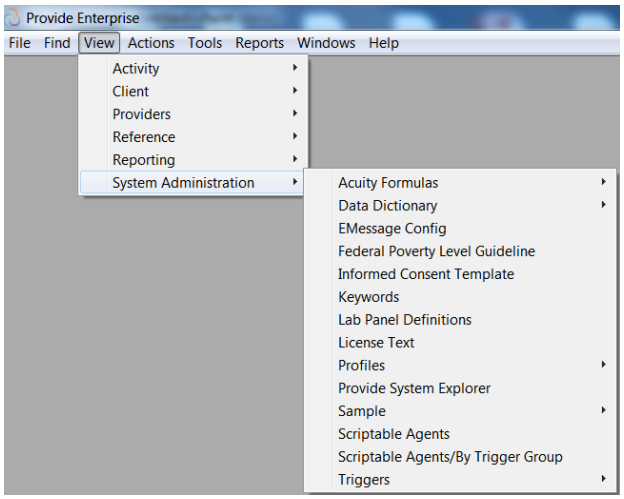


- Click the Yes to save your changes. You will be returned to the view you were in.
- Click on the button to refresh the view and you should see your Keyword record appear in the list.

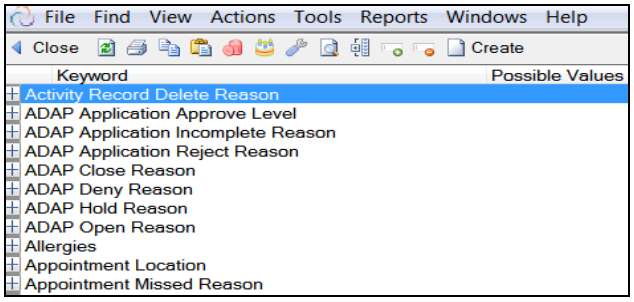
Editing Keywords

Occasionally, you may want to add new values to your Keywords. Remember, you should never delete values from the Keywords without contacting GTI for assistance first.

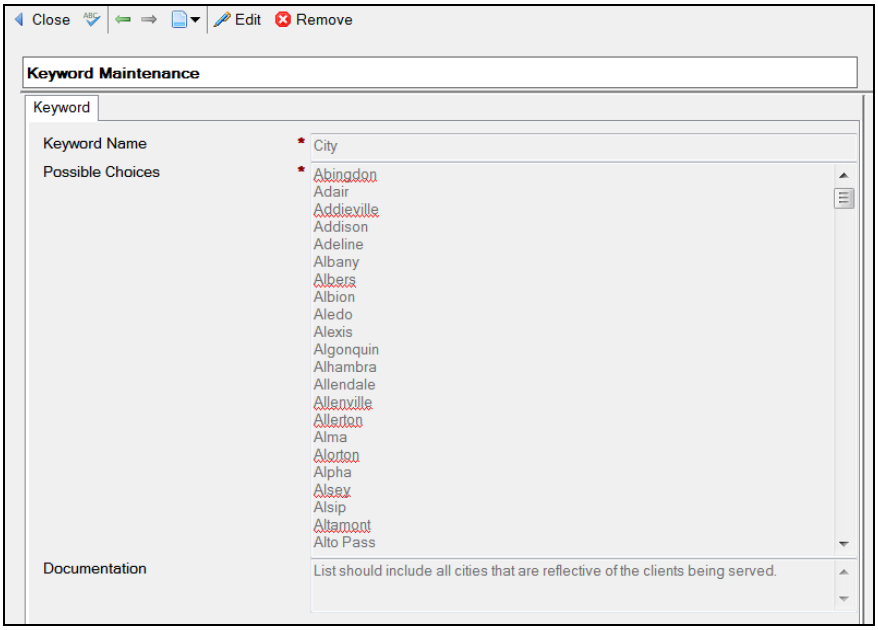
- Select the "System Administration – Keywords" view in PE, as seen in the figure below:



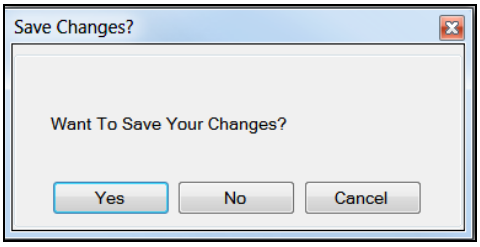
- A view similar to the one below will open:



- Find the Keyword you wish to edit in the list. Click on the next to the Keyword. This will expand the view and show you all of the current values associated with the Keyword. Double click on ANY of these values to open the existing Keyword, similar to that in the following figure.



- Click on the Edit button to bring the document into edit mode.
- Add any additional values into the "Possible Choices" field.
- When you have completed the form, click on the Close button. A prompt similar to the one below will appear:



- Click the Yes to save your changes. You will be returned to the view you were in.
- Click on the button to refresh the view and you should see your Keyword record appear in the list.

NOTE: After you have added a Keyword, you will need to do a rebuild of the database keyword cache in order for the value to be available for all End Users.

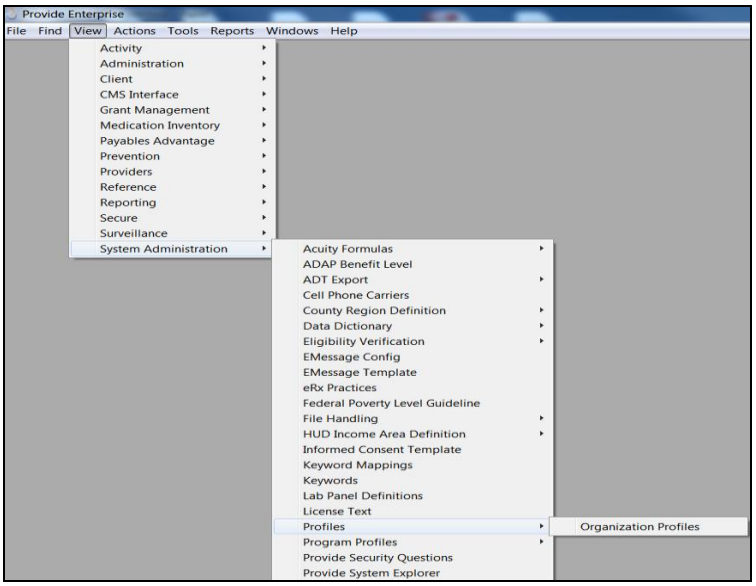
Organization Profiles

Organization Profiles in the System Administration Table are used to set up the Organizations that will be using the PE system.

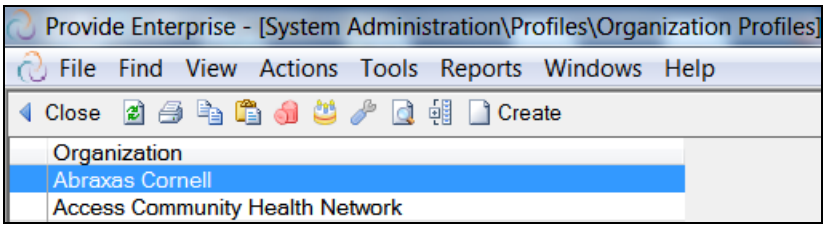
Adding Organization Profiles

To add an Organization Profile to the System Administration Table, follow the steps below:

- Select the "System Administration – Profiles – Organization Profiles" view in PE, as seen in the following figure.

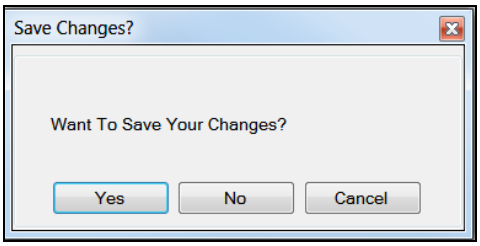


- A view similar to the one below will open:



- Click on the Create button to activate a blank Organization Profile record, similar to the one in the figure below.

- Fill out the fields as appropriate.
    - ***Organization:*** Select the organization using the Organization selector dialog by clicking on the selection button (circled in the above figure).
- When you have completed the form, click on the Close button. A prompt similar to the one below will appear:



- Click the Yes to save your changes. You will be returned to the view you were in.
- Click on the button to refresh the view and you should see your Organization Profile record appear in the list.

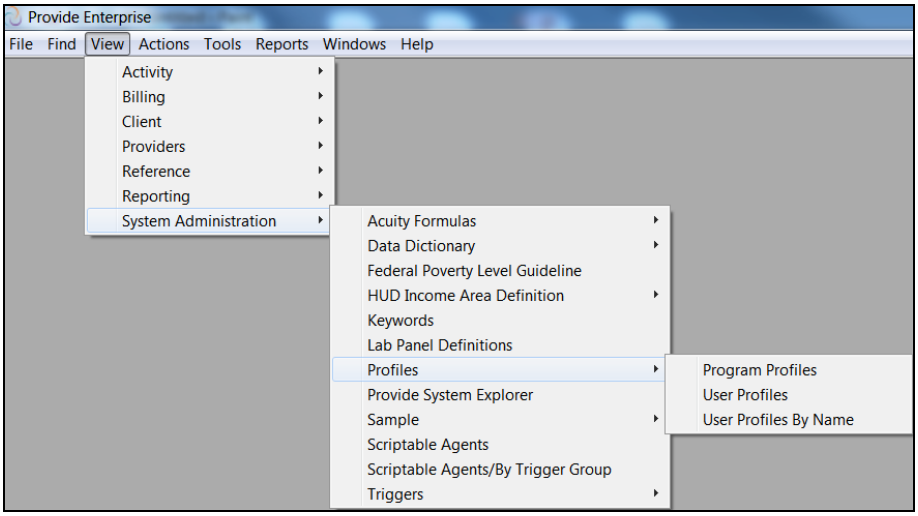
Program Profiles

Program Profiles in the System Administration table identify key elements of access to the data kept in all PE tables. The use of these Program Profiles ensures that only authorized Users of specific programs have access to data. In addition, these Profiles define specific information regarding each program using the system including what activity records End Users can create, what Assessments are available for each program, etc.

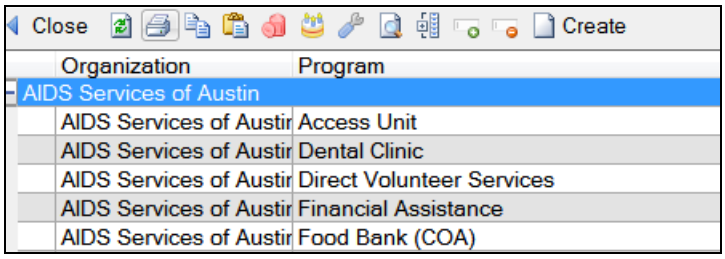
Adding Program Profiles

To add a Program Profile to the System Administration Table, follow the steps below:

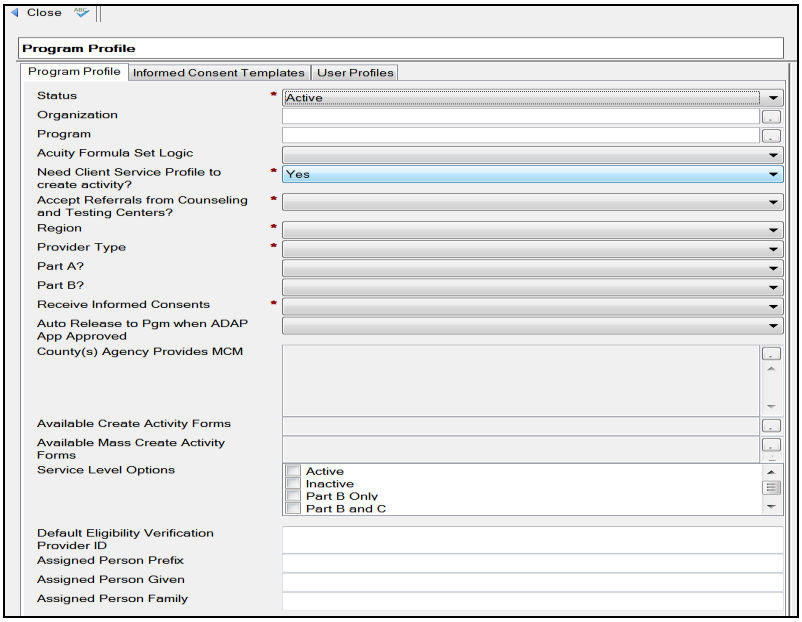
- Select the "System Administration – Profiles – Program Profiles" view in PE, as seen in the figure below:



- A view similar to the one below will open:



- Click on the Create button to activate a blank Program Profile record, similar to the one in the following figure.



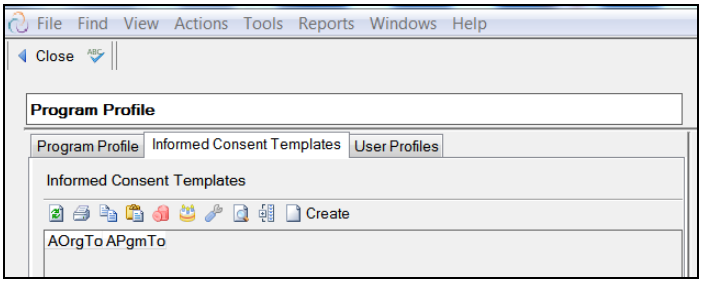
- Fill out the fields as appropriate:
- On Program Profile Tab:
    - ***Status:*** Select "Active" or "Inactive" as the status of the program.
    - ***Organization:*** Select the organization and program using the Organization selector dialog by clicking on the selection button (circled in the above figure).
    - ***Program:*** Select the organization and program using the Organization selector dialog by clicking on the selection button (circled in the above figure).
    - ***Acuity Formula Set Logic:*** Select from the options of "Total", "High" or "Low".
    - ***Need Client Service Profile to create activity?*** Select whether or not a Client Service Profile is necessary for a program to create activity records.
    - ***Accepting referrals from Counseling and Testing:*** Select whether or not the program accepts referrals from counseling and testing centers.
    - ***Region:*** Select the region of the program.
    - ***Provider Type:*** Select the provider type of the program.
    - ***Part A?:*** Select whether or not the program is Part A funded.

- ***Part B?:*** Select whether or not the program is Part B funded.
- ***Receive Informed:*** Select whether or not the program can receive informed consents.
- ***Auto Release to Pgm with ADAP App:*** Select whether or not to release the client to program with ADAP application.
- ***County(s) Agency Provides MCM:*** Select the county(s) the agency provides medical case management.
- ***Available Create Activity Forms:*** Select the activity forms the program is allowed to create.
- ***Available Mass Create Activity Forms:*** Select the activity forms the program is allowed to mass create.
- ***Service Level Options:*** Select the service level options of the program.
- ***Default Eligibility Verification Provider ID:*** Enter the default eligibility verification provider ID for the program (if applicable).

- On Informed Consent Template Tab:

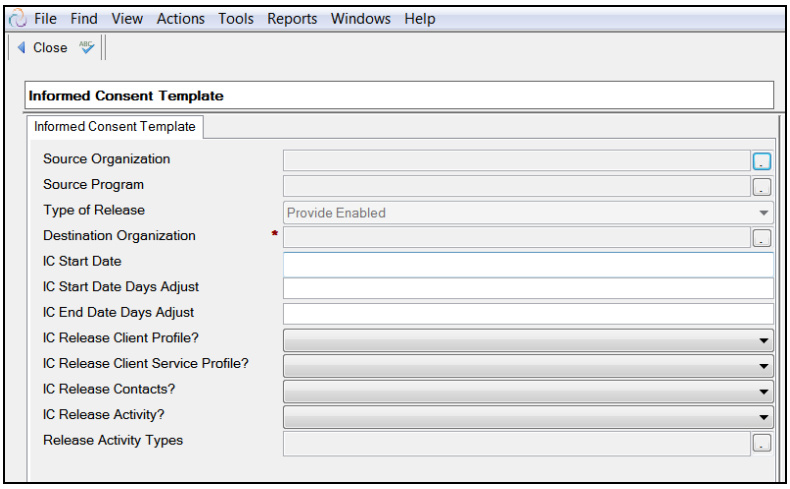
  In this section, you can define Informed Consent Templates to release by default a specific set of records to specific Organization-Program. Every program can be set up with its own special set of records that will be released by default. Individual End Users still have the ability to add or remove records or change start and end dates on a case-by-case basis.

  NOTE: If an Organization-Program does not have a Specific Destination Informed Consent the Default Informed Consent will be used.



- Click on the

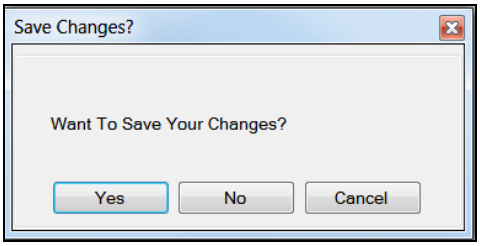
button to active a blank Informed Consent Template record, similar to the one in the following figure.



- ***Source Organization:*** Select the source organization. This value will automatically be inherited from the Program Profile you are in when creating the Informed Consent Template.
- ***Source Program:*** Select the source program. This value will automatically be inherited from the Program Profile you are in when creating the Informed Consent Template.
- ***Type of Release:*** This field will default to "Provide Enabled"
- ***Destination Organization:*** Select the destination organization. Select the organization and program using the Organization selector dialog by clicking on the selection button.
- ***Informed Consent Print Form:*** In this section, you set the output control setting that determines which Report is automatically generated when selecting the Print button in the Informed Consent document
- ***IC Start Date/IC Start Date Days Adjust:*** If you want all Informed Consents to have a specific Start Date, enter that date in the "IC Start Date Field", or, if you want to have the IC Start Date value adjusted based on the current date, enter the number of days in the IC Start Date Days Adjust Field. For example, if you want the Informed Consent Start Date to default to 30 days earlier than the current date, simply enter "-30" in the "IC Start Date Days Adjust" Field.
- ***IC End Date Days Adjust:*** If you want all Informed Consents to have a specific end date that is adjusted based on the Informed Consent Start Date, enter the number of days in this field. For example, if all Informed Consents should have an End Date that is 12 months after the Start Date, enter 365 in this field.
- ***Release of Client Profiles, Client Service Profiles, Contacts and Activity:*** Select whether or not you wish to release Client Profiles, Client Service Profiles, Contacts, and Activity Records.
- ***Release Activity Types, Assessment Types, and Condition Types:*** If you select to release Activity, you will need to select the activity types you wish to release.

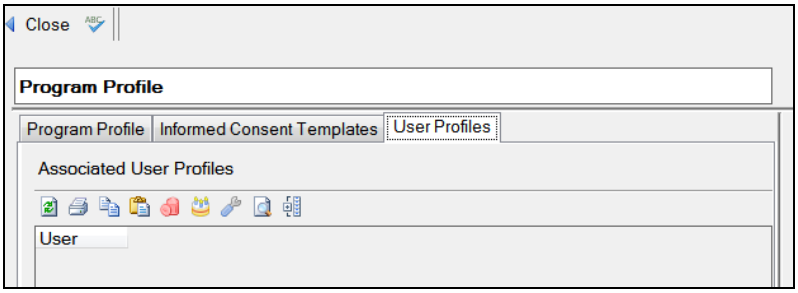
Additionally, if you select to release Assessments or Condition records, you will need to select the appropriate assessments or conditions to release.

- When you have completed the form, click on the Close button. A prompt similar to the one below will appear:



- Click the Yes to save your changes. You will be returned to the view you were in.
- Click on the button to refresh the view and you should see your Informed Consent record appear in the list.

- User Profiles Tab:



- This will list the associated user profiles with this program.

User Profiles

User Profiles define specifically what program(s) a User would have access to and defines specifically what level of access to Client records an End User has.

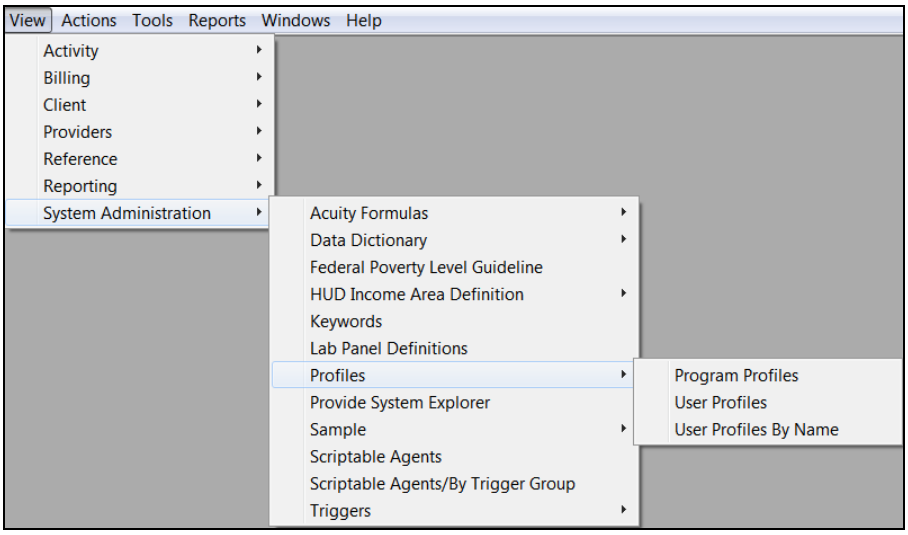
If the User is associated with more than one program, they can have multiple User Profiles and will use the "Tools – User Security" to change their "Current Profile" to reflect the organization/program they wish to enter data for.

NOTE: The easiest and fastest way to setup a new User in PE is to use the "New User Wizard" or to copy the User Profiles of an existing User to the new User. However, you may, from time to time, need to add new User Profiles for existing Users.

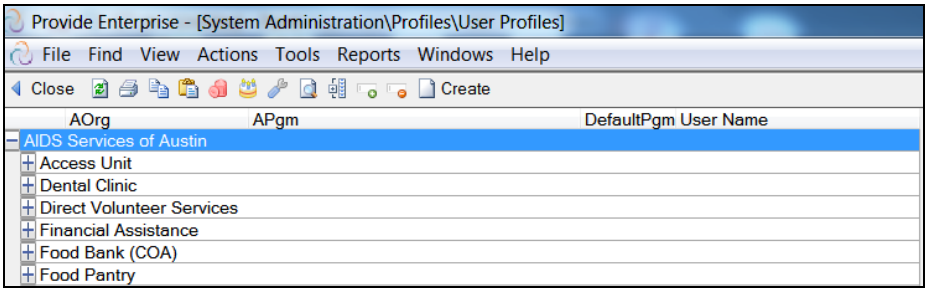
Setting up User Profiles

To create a User Profile, follow these steps:

- Select one of the "System Administration – Profiles – User Profiles…." views in PE, as seen in the following figure:

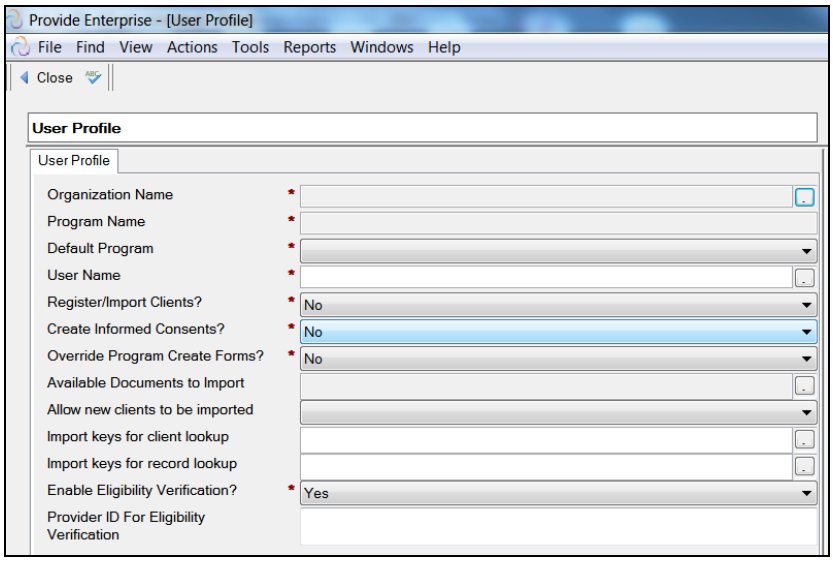


- A view similar to the one below will open:



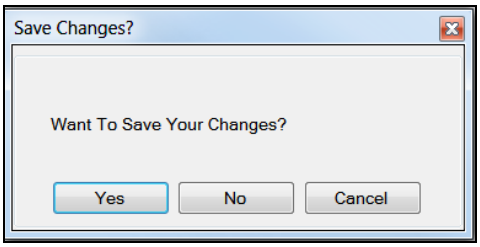
- Click on the

button to activate a blank User Profile record, similar to the one in the figure below.



- Fill out the fields as appropriate.
  - ***Organization Name:*** Select the User's organization from the listing.
  - ***Program Name:*** Select the User's program from the listing of program profiles.
  - ***Default Program:*** This field is used to indicate if the Program is the "primary program" that the End User normally works in. This is important to set properly for staff that work in multiple programs within an agency or potentially work for multiple agencies using the PE system.
  - ***User Name:*** Enter the User's SQL Login.
  - ***Register/Import Clients:*** This field is a way to identify which Users will be able to register and/or import Clients. Only Users with the "Yes" selected here will be able to perform these actions.
  - ***Create Informed Consents:*** This field is a way to identify which Users will be able to create Informed Consents to release Clients and Client activities to other agencies with PE. Only Users with the "Yes" selected here will be able to perform this action.
  - ***Override Program Create Forms:*** Setting this field to "Yes" allows you to give a User a unique list of forms they can create in PE rather than just the ones specified in the Program profile.
  - ***Available Documents to Import:*** Select the documents that the user is allowed to import.
  - ***Allow new clients to be Imported:*** Select "Yes" or "No."
  - ***Import keys for client Lookup:*** Select the import keys for client lookup.
  - ***Import keys for record Lookup:*** Select the import keys for record lookup.
  - ***Enable Eligibility:*** Select "Yes" or "No."
  - ***Provider ID for Eligibility Verification:*** Enter the provider ID Number for eligibility verification.

- When you have completed the form, click on the Close button. A prompt similar to the one below will appear:



- Click the Yes to save your changes. You will be returned to the view you were in.
- Click on the button to refresh the view and you should see your User Profile record appear in the list.

Chapter

5

Completing Provide® Enterprise Administrator Tasks

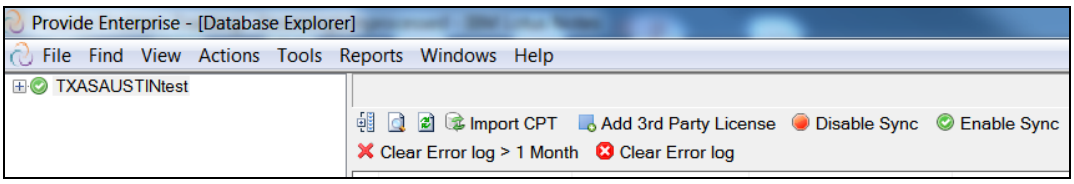
PE is also used to perform some of the advanced tasks performed by System Administrators. These tasks include:

- Auto Number Field Creation
- Client Cache Management
- Database Schema Management
- Error Log
- Find Setup
- User Manager
- View Manager

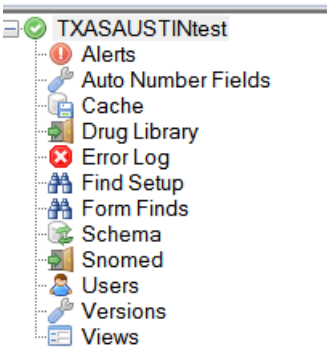
Navigation

Administrators have all the functions of the regular PE Client; however, the Administrator also has access to one added feature – the Explorer. The Explorer allows you to complete all of the advanced tasks of System Administration.

When logging into Provide, the Explorer will be displayed on the left side of the screen or from the Windows toolbar (by selecting "Tools-Explorer"), the screen will look similar to that in the figure below:



On the left hand side of the screen, you will see the server that you are able to access. When expanding the view (by clicking on the ⊞ next to the server name), your options will expand to look like that in the following figure.



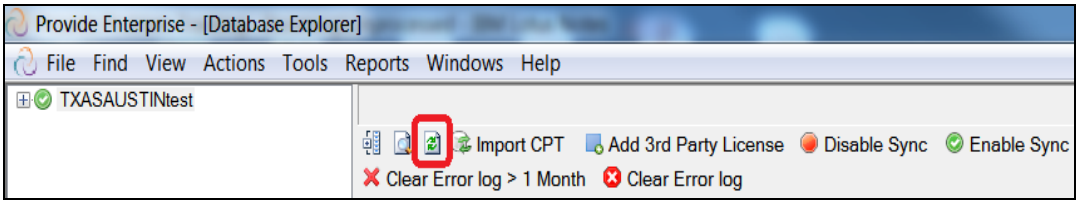
All of these functions will be discussed in detail in this guide.

Server Options

When you right click on a server, a number of selections are available for your use. These will be discussed in this section of the System Administration Guide.

Refresh

To refresh the view, click on the refresh button as shown below. Selecting this will Refresh the view, so that if you recently added an autonumber field, registered a database, etc. it will now appear in the view.



Purging Documents

System Administrators have the ability to "Purge" or permanently delete a variety of documents from the PE Database. NOTE: You should be very careful when purging documents from the database. Once a document has been purged, there is NO way to recover that document.

Purging Removed Documents

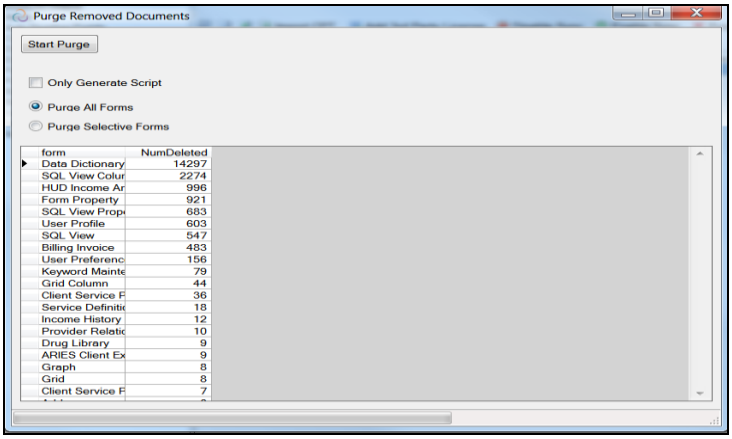
This function allows you to permanently delete documents that have been marked as "Removed" by Users of the database. You should be very careful when purging documents from the database. Once a document has been purged, there is NO way to recover that document.

To do this, follow the steps below:

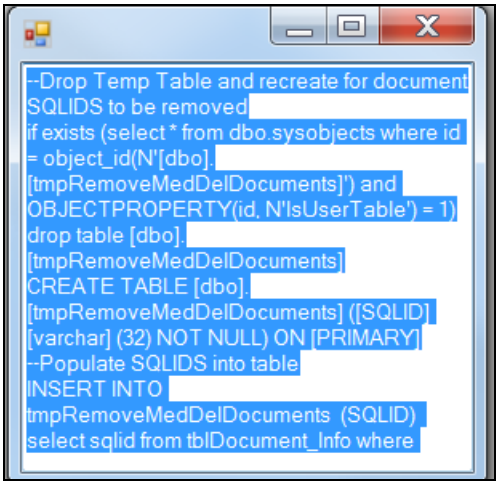
- Open your PE Administrator Client.

- On the top of the screen (in the secondary toolbar),you will see the "Purge Removed Documents."

  - Select "Purge Removed Documents". A dialog box similar to the one in the figure below will be opened.



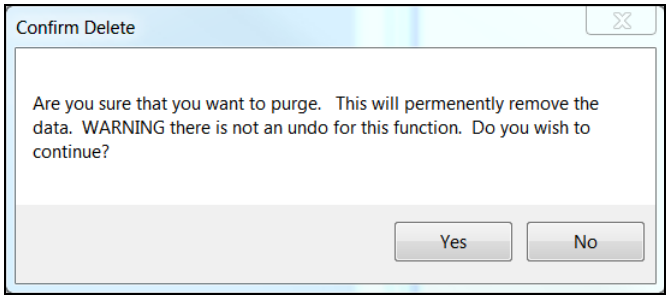
  - Make the selections to determine which documents will be purged from the database:
    - ***Only Generate Script:*** If this option is selected, instead of the purge actually running, an on screen dialog will appear showing the SQL Query(ies) associated with purging the document(s). You can then copy this script, schedule it as a job, run it in SQL Query Analyzer or split it up into different parts. The on screen dialog looks similar to that in the figure below:



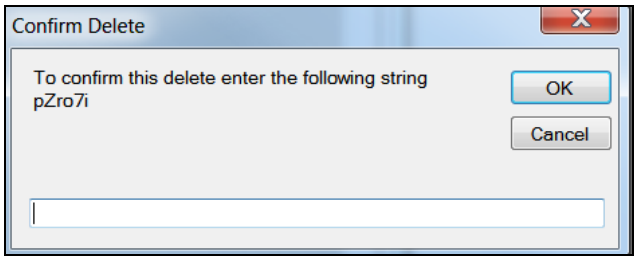
    - ***Purge All Forms:*** This selection will purge ALL Forms from the PE Database.

- ***Purge Selective Forms:*** Making this selection will allow you to select which forms you want to Purge from the database.

- After making your selections, click on the Start Purge button to begin the Purge process. A dialog box similar to that in the figure below will appear, verifying that you want to Purge the selected documents.

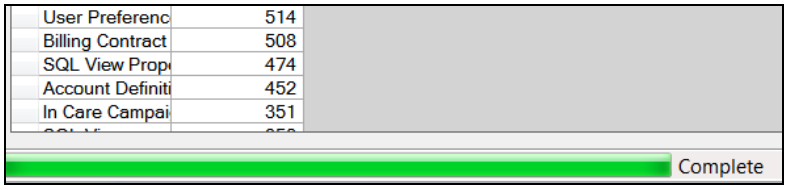


- Click on the Yes button to continue. A dialog box similar to the following will appear:



- Enter the confirmation code listed in the "Confirm Delete" dialog box and then click on the OK button to continue.

- At the bottom of the "Purge Document" dialog, you will see the progress as the system processes your request. (Similar to that in the figure below.)



- After the Purge process has completed, simply close out the dialog box by clicking on the X in the upper right hand corner.

Purging Documents

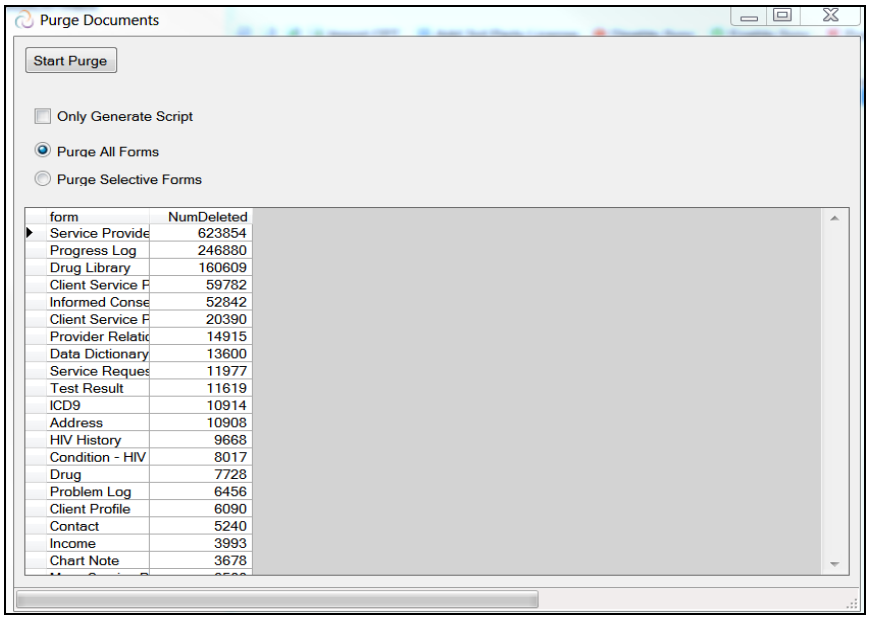
This function allows you to permanently delete any documents that you want from the database. You should be very careful when purging documents from the database. Once a document has been purged, there is NO way to recover that document.

To do this, follow the steps below:

- Open your PE.

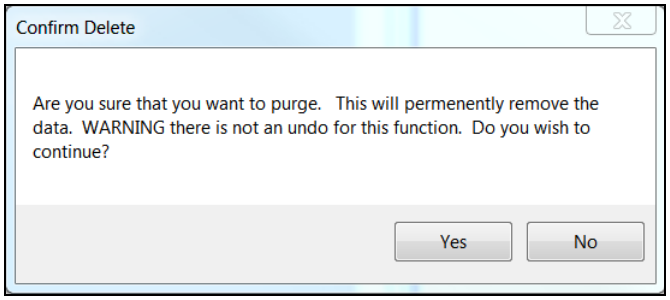
- On the top of the screen (in the secondary toolbar), you will see the "Purge Documents."

- Select "Purge Documents." A dialog box similar to the one in the figure below will be opened.

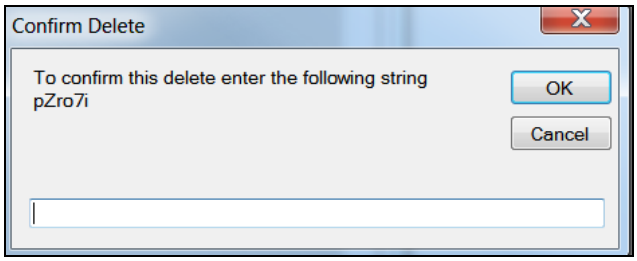


- Make the selections to determine which documents will be purged from the database: (See Purging Removed Documents for a detailed description of these fields).

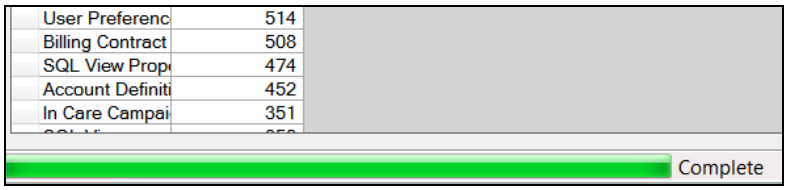
- After making your selections, click on the Start Purge button to begin the Purge process. A dialog box similar to that in the following figure will appear, verifying that you want to Purge the selected documents.



- Click on the Yes button to continue. A dialog box similar to the following will appear:



- Enter the confirmation code listed in the "Confirm Delete" dialog box and then click on the OK button to continue.
- At the bottom of the "Purge Document" dialog, you will see the progress as the system processes your request. (Similar to that in the figure below.)



- After the Purge process has completed, simply close out the dialog box by clicking on the X in the upper right hand corner.

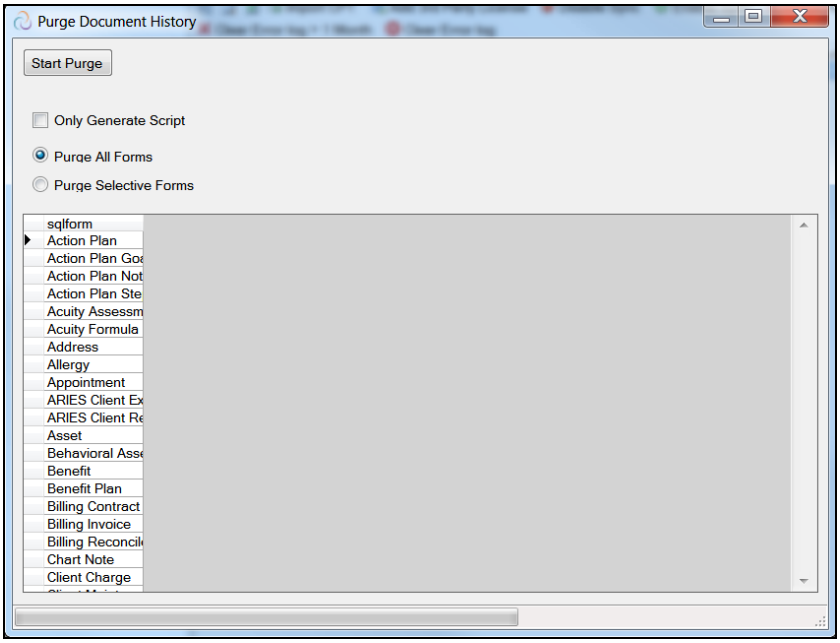
Purging Document History

This function allows you to permanently delete document history from the database. You should be very careful when purging documents from the database. Once a document has been purged, there is NO way to recover that document.

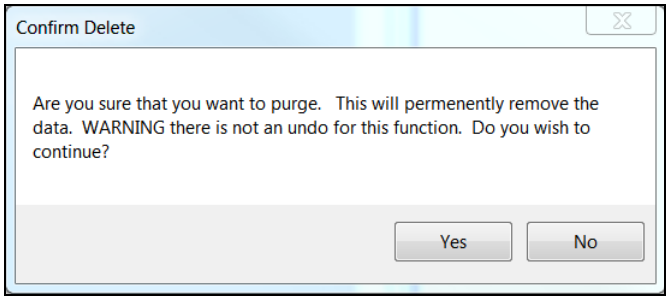
To do this, follow the steps below:

- On the top of the screen (in the secondary toolbar),you will see the "Purge Document History."

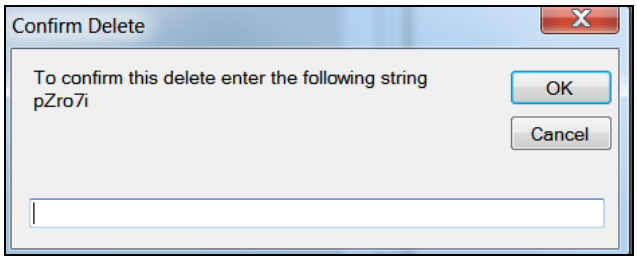
- Select "Purge Document History". A dialog box similar to the one in the figure below will be opened.



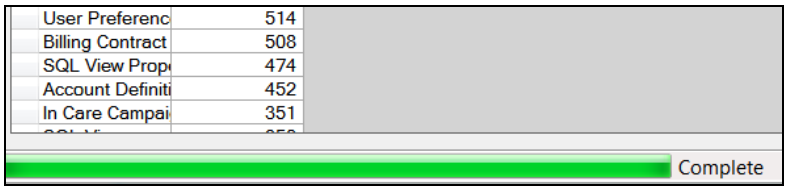
- Make the selections to determine which document history will be purged from the database: (See Purging Removed Documents for a detailed description of these fields).
- After making your selections, click on the Start Purge button to begin the Purge process. A dialog box similar to that in the figure below will appear, verifying that you want to Purge the selected documents.



- Click on the Yes button to continue. A dialog box similar to the following will appear:



- Enter the confirmation code listed in the "Confirm Delete" dialog box and then click on the OK button to continue.
- At the bottom of the "Purge Document" dialog, you will see the progress as the system processes your request. (Similar to that in the figure below.)



- After the Purge process has completed, simply close out the dialog box by clicking on the in the upper right hand corner.

Managing Bucket Tables

Bucket Tables contain data that is no longer defined to the Data Dictionary. Information is moved to the Bucket Tables in a variety of instances:

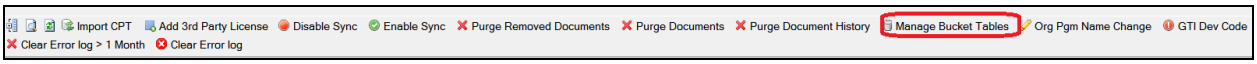
1) If a field in Provide® is not also defined to the Data Dictionary for PE, any data from the applicable field is moved to the Bucket Tables when the Sync Engine runs. The data is placed in the appropriate Bucket Table based on the field type.

2) When a field is removed from the Data Dictionary in PE and the field contains data, it is moved to the appropriate Bucket Table based on the field type.

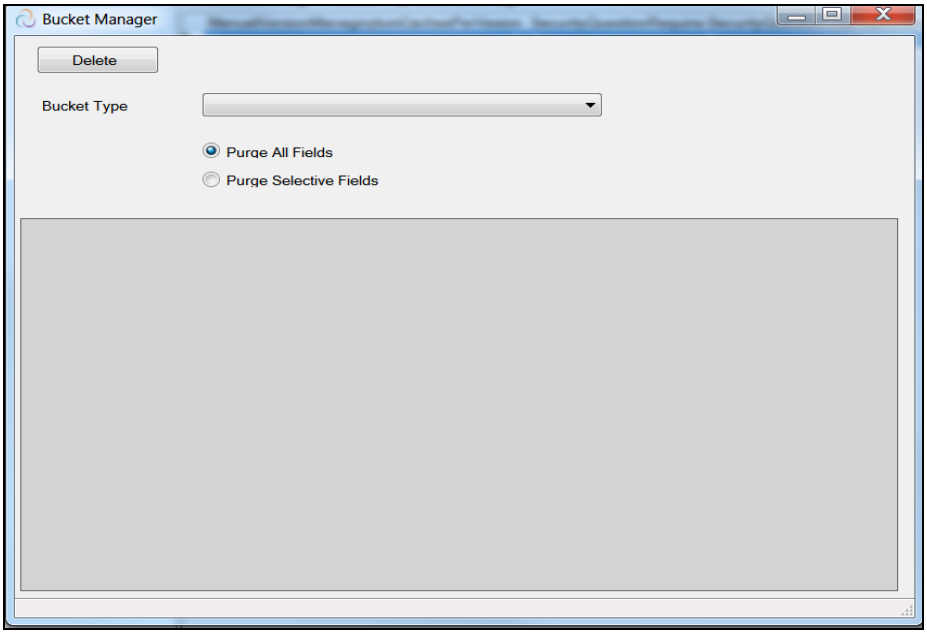
As a System Administrator, you have the ability to manage the data in the Bucket Tables.

To do this, follow the steps below:

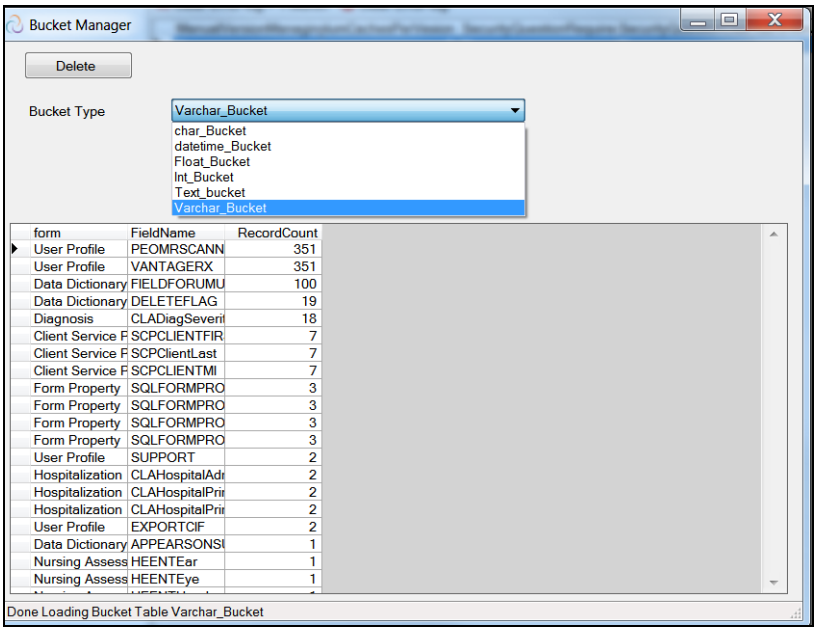
- Open your PE Client to the "Explorer" window.
- On the top of the screen (in the secondary toolbar),you will see "Manage Bucket Tables."



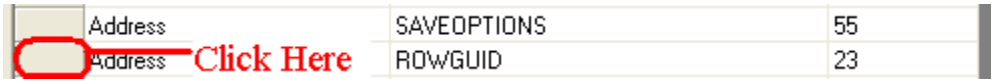
- A dialog box, similar to the one in the figure below will appear:



- Select the "Bucket Type" based on the data type you want to manage. The dialog box will refresh to look similar to that in the figure below:

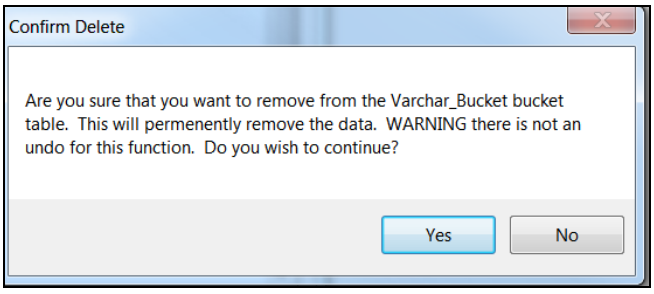


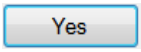
- This view will show you the form, field name and the number of records that are included in the Bucket Table for each field.
- Select the field(s) you wish to delete by single clicking on each of them (hold down the control key on your keyboard if you are selecting more than one). This will highlight the field in blue. NOTE: You should be very careful when deleting fields from the database. Once a field has been deleted, there is NO way to recover that document.



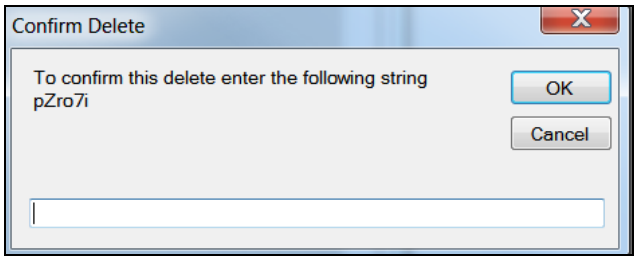
- Click on the

button to begin the deletion process. A dialog box, similar to that in the figure below will appear.

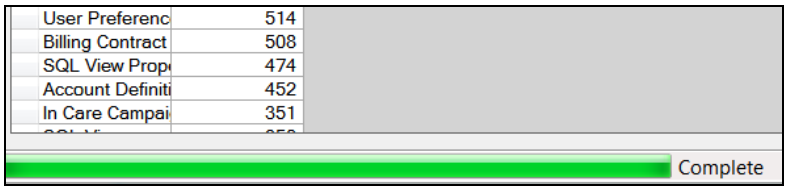


- To continue the deletion process, simply click on the 

button. A dialog box similar to the one in the figure below will appear:



- Enter the confirmation code listed in the dialog box and then click on the OK to continue.
- After deletion has completed, you will be notified in the lower right hand corner of the "Manage Bucket Tables" dialog, seen in the figure below.



- After the process has completed, simply close out the dialog box by clicking on the in the upper right hand corner.

Explorer Options

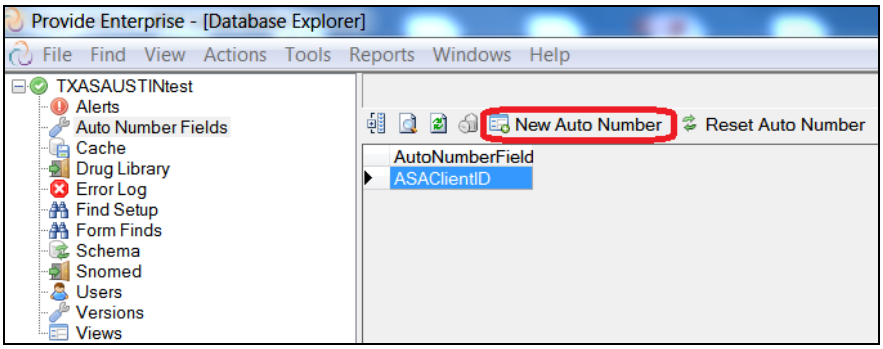
Auto Number Fields

Auto Number Fields can be created for use in PE. When creating an Auto Number Field, the field name and initial value is defined. Later, you can reset the initial value. A field in a form in the PE database can then be defined to automatically select the current value of any of the Auto Number Fields, use it and then increment the Auto Number Field by whatever value you specify. This type of field may be useful in the assignment of Client ID numbers for newly registered Clients or a unique incremental encounter ID used in Progress Logs or Chart Notes.

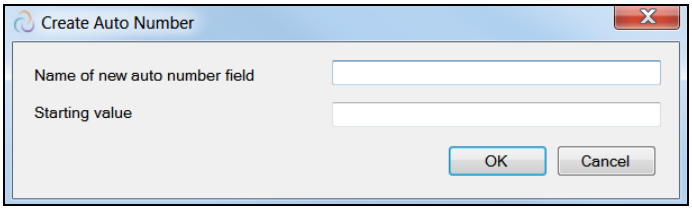
Creating a New Auto Number Field

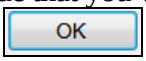
To create an Auto Number Field, follow the steps below:

- Open your Explorer" window.
- Click on "Auto Number Fields" in the left hand view navigator. If any Auto Number Fields currently exist, they will appear in the view pane on the right hand side of your screen.
- Right click in the view pane and select "New Auto Number Field", as seen in the figure below:

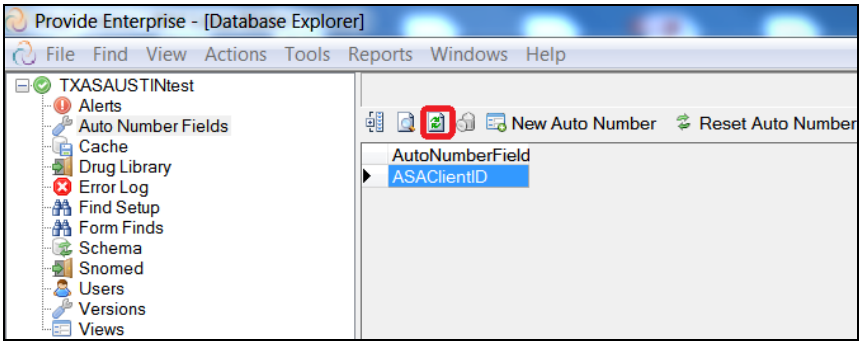


- A dialog box, similar to the one in the figure below will appear, asking for you to name your field.



- Enter the name you want to save this field as and enter the numeric value that you want your Auto Number Field to begin with when it is first used then click on the  button. NOTE: the Auto Number Field name should not contain any spaces or special characters (period, parenthesis, etc.)

- This will save your Auto Number Field so that it can be used within fields in your PE Database.
- To see the Auto Number Field appear in the view pane, right click in the view pane and select "Refresh", circled in the figure below.



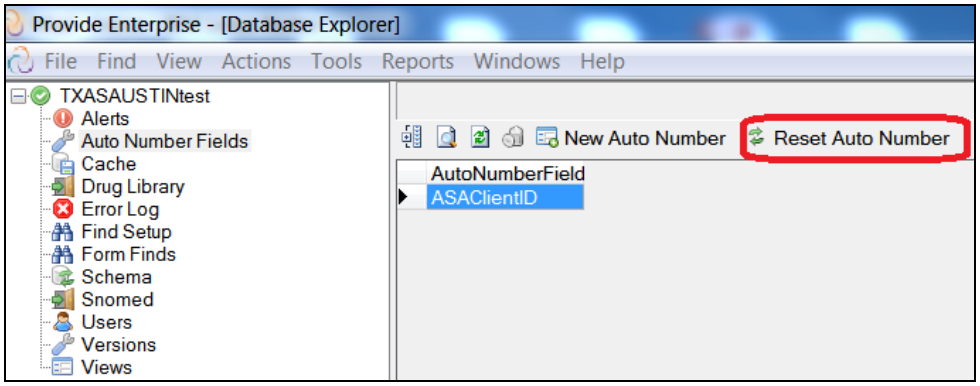
- After refreshing this view, your Auto Number Field will appear.

Resetting the Value of an Auto Number Field

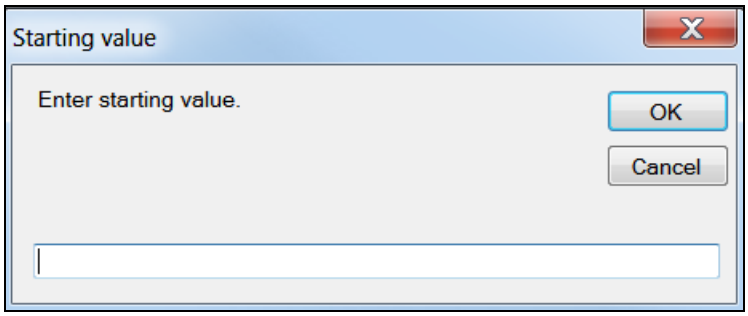
If at any time, you want to reset the value of an Auto Number Field, follow these steps:

- Open your "Explorer" window.
- Click on "Auto Number Fields" in the left hand view navigator. All Auto Number Fields that have been created will appear in the view pane on the right hand side of your screen.

- Click on the Auto Number Field that you want to reset the value of and select "Reset Value". A dialog box, similar to the one in the figure below will appear on your screen.



- A dialog box, similar to the one in the figure below will appear on your screen.



- Enter the numeric value that you want to reset your auto number field to and then click on the OK button. This will save your change.

Cache/Schema

After making changes to the Data Dictionary (changes to a field on a PE Form, adding or updating a view, changing or adding a form property), updating Keyword possible values or adding new Keywords you must use the Cache Manager to build and release new versions of the PE Client Cache. Once built, saved and enabled Users will automatically download the updated Cache the next time they log on to the PE Database.

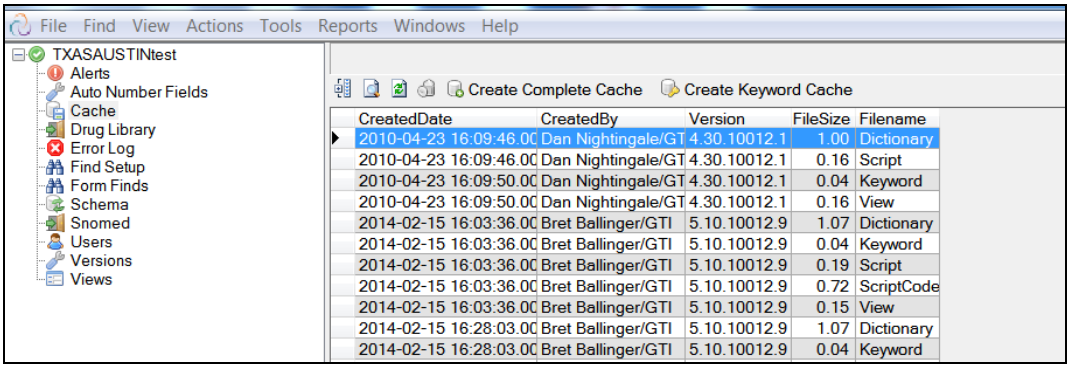
After making changes to the Data Dictionary that cause changes to a PE Table (adding or removing fields or changing a field length or type) use the PE Database Schema Manager to rebuild the Schema. The Schema update automatically adds, modifies or removes columns from PE Tables based on the definitions in the Data Dictionary. You can also force the build of a new Cache at the same time (which you would typically want to do).

Deleting Cache Files

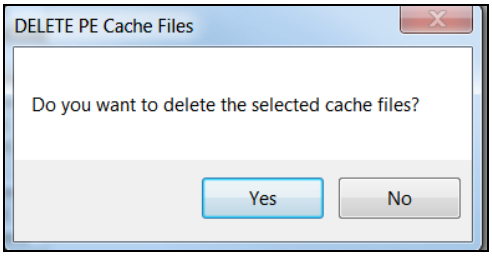
Each time you re-build the Cache in your database a separate version of the Cache is saved. Occasionally, you may want to delete old versions of the Cache to decrease the size of your PE Database.

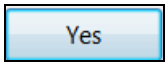
To delete Cache files, follow the steps below:

- Open your "Explorer" window.
- Click on "Cache" in the left hand view navigator. All previous versions of the Cache will show up on the right hand side of the screen (in the view pane), similar to that seen in the figure below:



- Right click on the Cache file you wish to delete. Selecting "Delete" will make the dialog box seen below appear. NOTE: Be very careful about deleting Cache files. You should ensure that all of your Users have upgraded their current Cache files prior to deleting old versions of the Cache.



- Click on the 

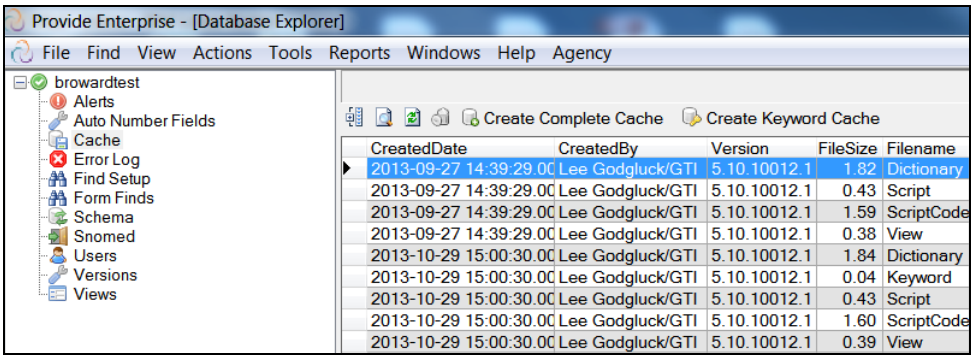
button to continue with the deletion. The selected Cache file will be deleted and the view of Cache Files will automatically refresh.

Creating Complete Cache Files

Creating a New Cache File will force a full and complete re-build of the database Cache.

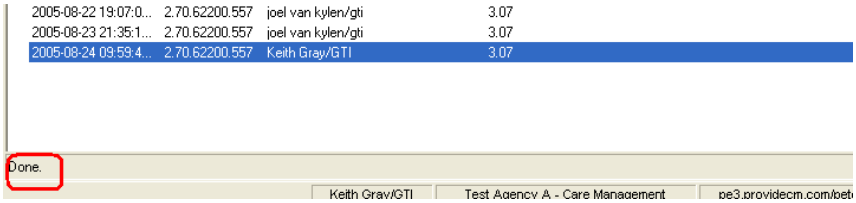
To create a New Cache File, follow the steps below:

- Open your "Explorer" window.
- Click on "Cache" in the left hand view navigator. All previous versions of the Cache will show up on the right hand side of the screen (in the view pane), similar to that seen in the following figure:



- Click on

- The system will start to compile and build the New Cache File. This will take several minutes, depending on the size of your database.
- When the release has completed, you will notice the word "Done" in the lower right hand corner of the View Pane, seen in the figure below.



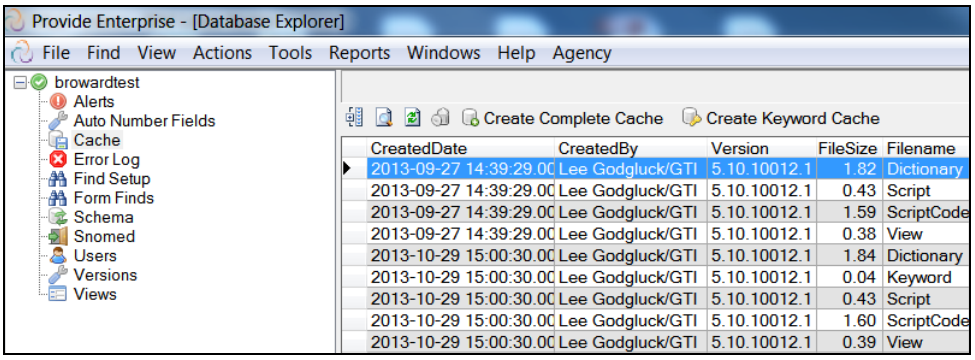
- When the Cache has been created, users can download the new Cache file by selecting "Tools – Refresh – Cache" or by logging out of PE and back in.

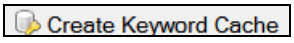
Creating a New Keyword Cache

Creating a New Keyword Cache will build and release a new cache file including all keywords. This is helpful if a change is made to an existing keyword.

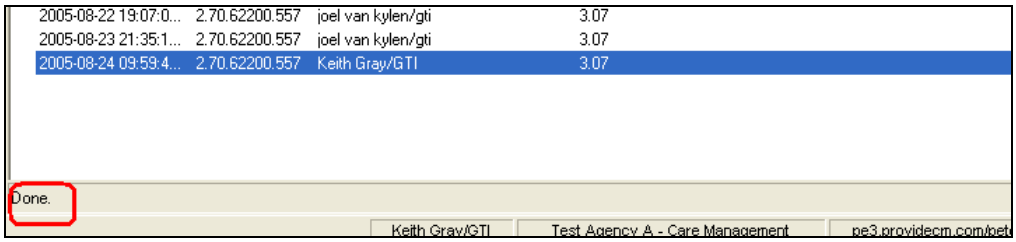
To create a New Keyword Cache, follow the steps below:

- Open your "Explorer" window.
- Click on "Cache" in the left hand view navigator. All previous versions of the Cache will show up on the right hand side of the screen (in the view pane), similar to that seen in the following figure:



- Click on 

- When the release has completed, you will notice the word "Done" in the lower right hand corner of the View Pane, seen in the figure below.



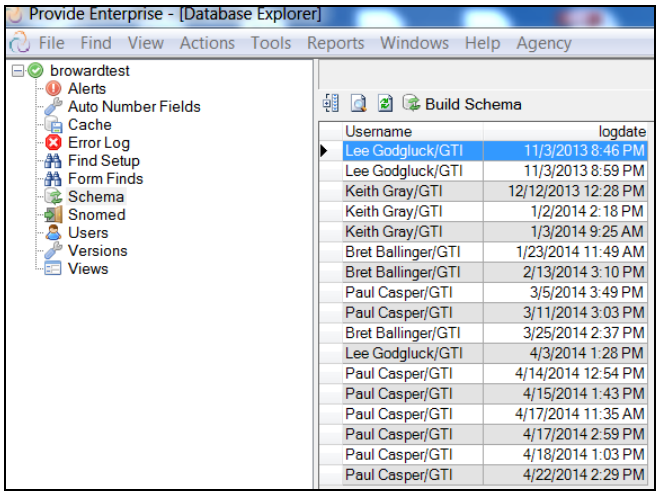
- When the Keyword Cache has been created, users can download the new Cache file by selecting "Tools – Refresh – Cache" or by logging out of PE and back in.

Building a Schema

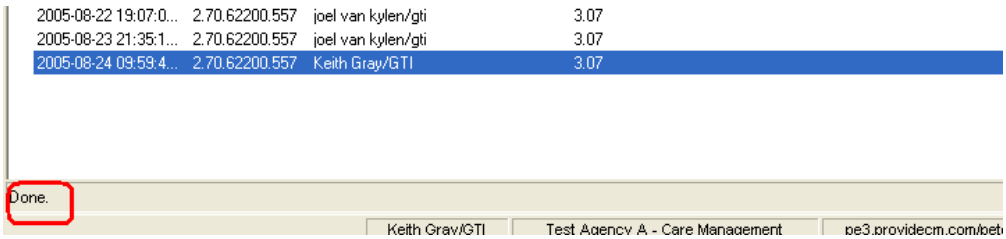
Rebuilding the Schema with Default Options will rebuild ONLY the database schema and not Cache files. This can be useful when a new version of the PE Client software is released, or if you have create Cache files and have not updated the database schema.

To Rebuild the Schema with Default Options, follow the steps below:

- Open your "Explorer" window.



- Click on "Build Schema."
- When the release has completed, you will notice the word "Done" in the lower right hand corner of the View Pane, seen in the figure below.



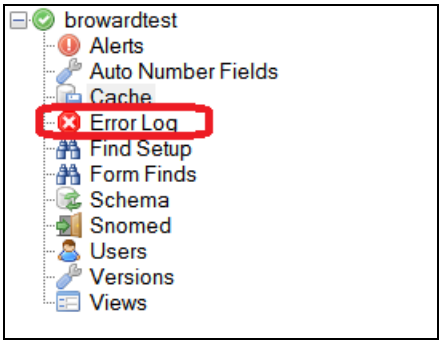
- When the Schema has been built, users can download it by logging out of PE and back in.

Error Log

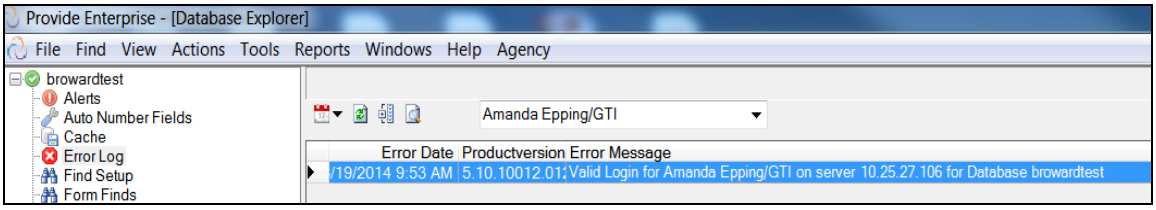
The Error Log allows you to review the error messages generated when Users attempt to log on to the PE database or experience program errors while using the PE.

To use the Error Log, follow the steps below:

- Open your "Explorer" window.
- Click on "Error Log" in your explorer window (circled in the figure below).

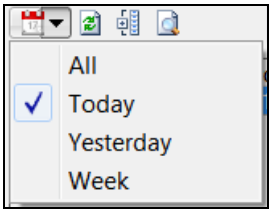


- The Error Log will open in the View Pane on the right hand side of the screen, similar to that in the figure below:

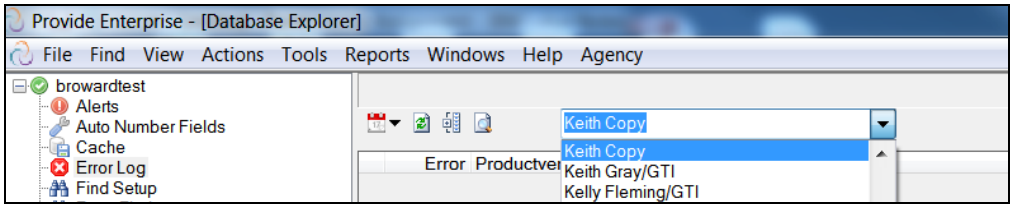


- There are three (3) different buttons in the Error Log that allow you to select what errors you wish to view. These work in conjunction with the "User" selection in the Error Log. All of these will be discussed below.

    - **Date Selection:** Date selection for viewing errors is done using the button. When you click on this button, it will expand (to look similar to that in the figure below) to give you four different date options.



    - **User Selection:** In order to select the User that you wish to view errors for, simply click on and select the user to view their error log.



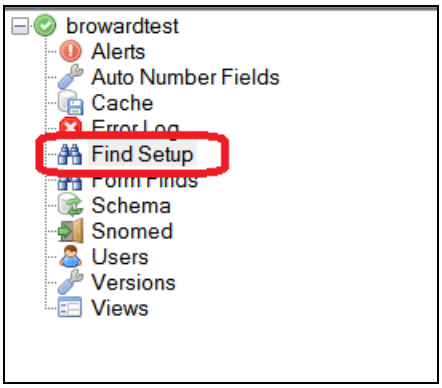
    - **Refresh:** Using the refresh button will refresh the Error Log view.

Find Setup Manager

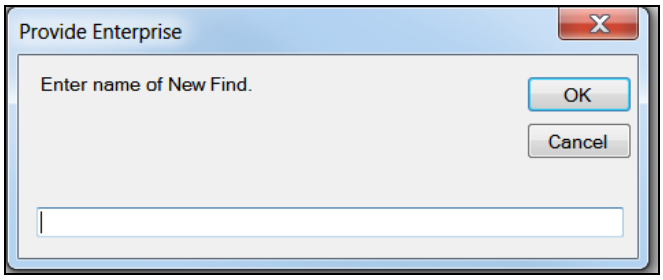
You can setup and maintain PE Client "Find" Menu Options here. You can build as many different Find Menu Options as you wish and the Menu Options can be layered to make them easier to access (for example: Provider\Facility and Provider\Individual). You can define the fields and order of fields that appear on the Find screen and the columns and column order for the Find Result View.

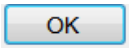
Creating a New "Find" Menu Option

- Open your PE "Explorer" window.
- Click on "Find Setup" in your explorer window (circled in the figure below).

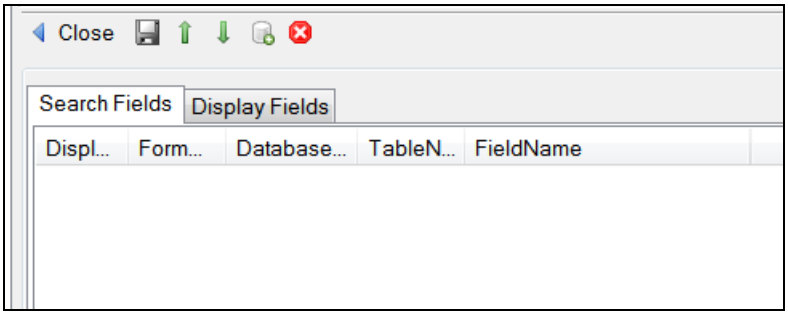


- Select "New Find Client". A dialog box, similar to that in the figure below will open asking for you to enter the name of your new find.



- Enter the name of your Find and then click on the 

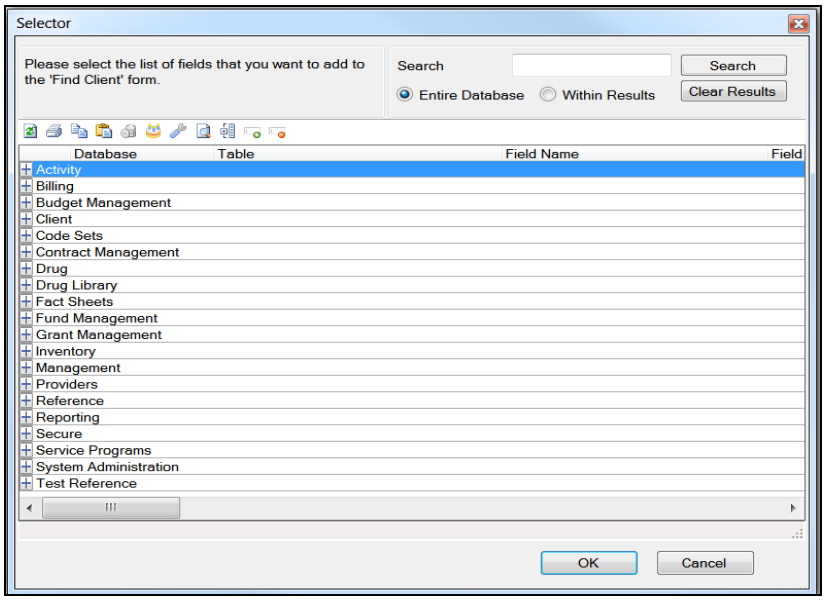
button. NOTE: If you want the Find to be "layered", you should format the name similar the following: Providers\Facility. This will allow a drop down to appear when you have more than one "Providers" Find menu.
- The New Find Setup form will open in the view pane and will look similar to that in the figure below:



- There are two tabs to the Find Setup Manager.
    - **Search Fields:** On this tab, you will select the fields that you want to make available for use in this "Find" menu option.
    - **Display Fields:** On this tab, you define what fields are displayed after the search has been completed.

- Both tabs include the same "buttons", all of which will be discussed below:

- **Add Field Button:** The "Add Field" button will allow you to add a new field to the "Search Fields" or "Display Fields" tabs. When you click on the button, a dialog box similar to the one below, showing the Data Dictionary will appear.

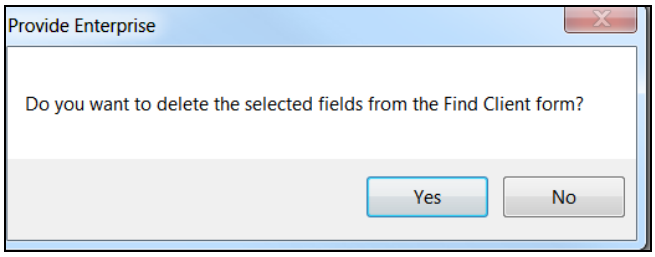


Simply navigate through the Data Dictionary (or use the full text search in the upper right hand corner) to find the field(s) that you want to include in the Find setup. Single click next to each field to select the field. Once you have added the field(s) you want, simply click on the OK button to continue.

- **Save Button:** The "Save" button ( ) will save the "Find Menu" setup and/or any changes made to the setup. NOTE: If nothing has been added or changed in the setup, this button will not be active. After clicking the "Save" button, a dialog box will appear, verifying your save and will look similar to that in the figure below.

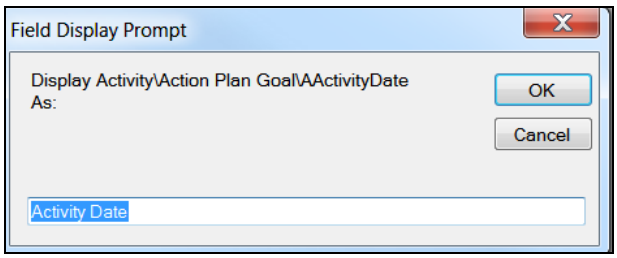
Simply click on the OK button to continue.

- **Re-Order Buttons:** These buttons will allow you to move fields up or down in the Find Setup. Simply click on the field that you want to re-order and then click on the or button, depending on where you want the field to move to.
- **Delete Button:** If you wish to remove a field from your find setup, simply click on that field and then on the button. A dialog box similar to that in the figure below will appear to verify deletion:



Click on the Yes button to finalize deletion.

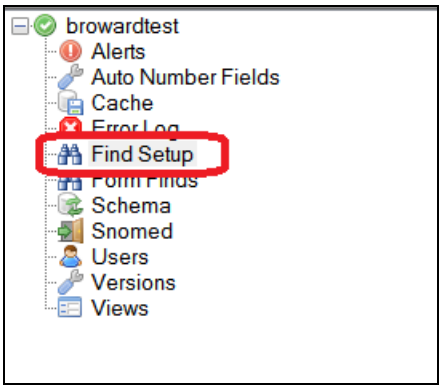
- If you wish to change the "Display" value of a particular field, simply double click on the field. A dialog box, similar to that in the figure below will appear.



- Simply enter the display prompt that you want to be used for this field and then click on the OK button.

Managing Existing "Find" Menu Option

- Open your "Explorer" window.
- Click on "Find Setup" in your explorer window (circled in the figure below).

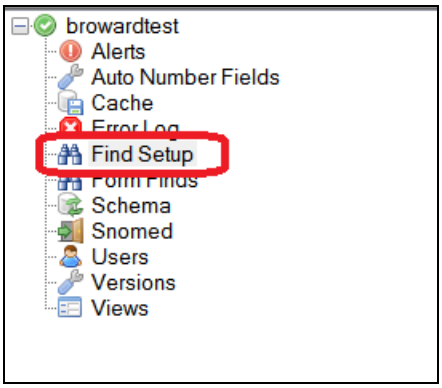


- If there are any existing "Find" menu options, Find Types will be listed. Click on the name and then ⊞ will appear to the left of the Find Setup allowing you to expand this to view the currently active setups.
- Single click on the setup that you want to make changes to. The setup will then appear on the right hand side of your screen in the view pane.
- Make any applicable changes. (See "Creating a New Find Menu Option" for details on how to use the "Find" Manager.)

Deleting Existing "Find" Menu Option

- Open your "Explorer" window.

  Click on "Find Setup" in your explorer window (circled in the figure below).



- If there are any existing "Find" menu options, a will appear to the right of the Find Setup allowing you to expand this to view the currently active setups.
- Click on the Find Setup that you wish to delete and select "Delete". The "Find" menu setup will be deleted. You may also select the step and click on .

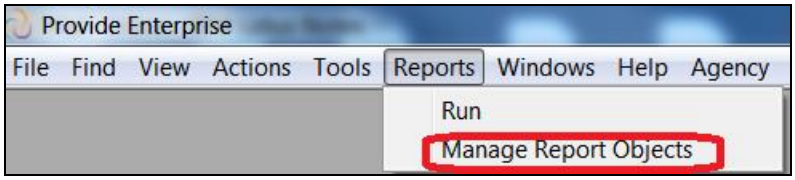
Report Manager

The "Report Manager" allows you to load new Crystal Report Object "Reports" into the PE database Report Library. Note, this function also exists in the Report\Manage Report Objects menu option from the PE Client.

Adding a New Report Object

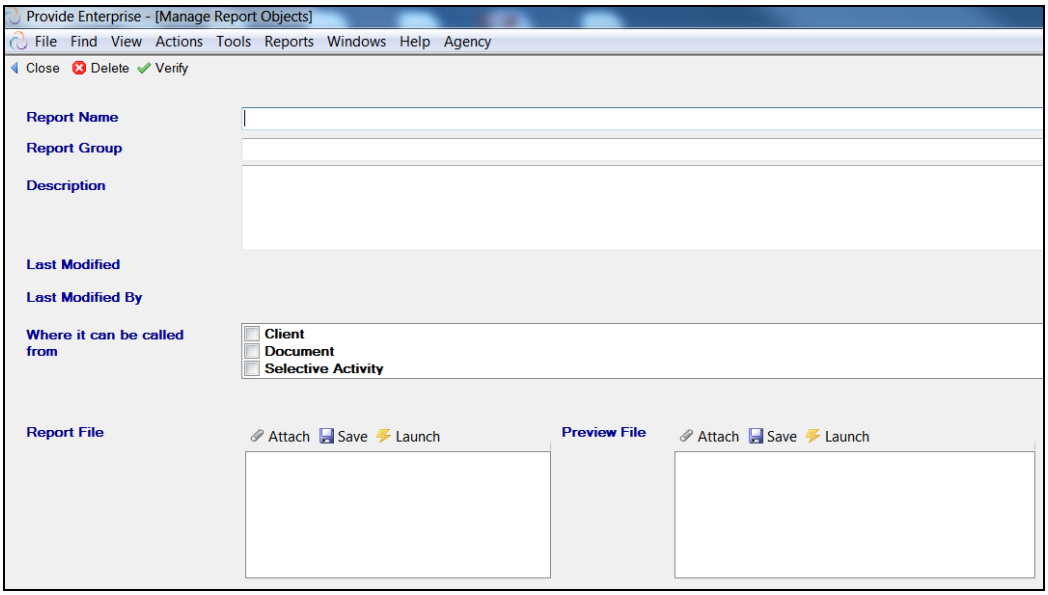
To add a new report object, follow the steps below:

- Open your "Explorer" window.
- Click on "Reports" on you tool bar. Select "Manage Report Objects (circled in the figure below). All report objects that have been added to your database will appear.



- Click on

to add a new report.
- You will then see a screen similar to the one below:

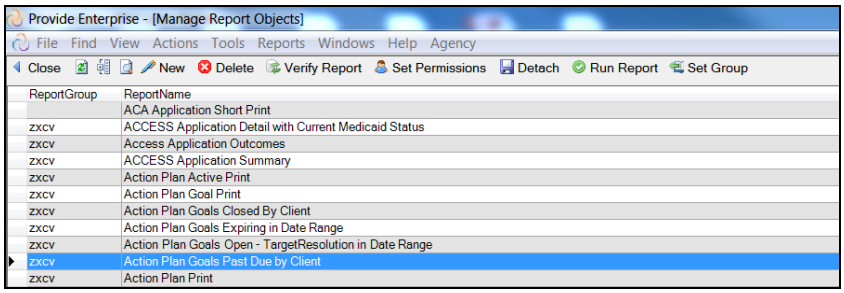


- Type in the report name and description in the applicable fields.
- Select the places the report can be called from by checking the desired boxes.
- Attach the file by browsing and selecting it with the Attach button.

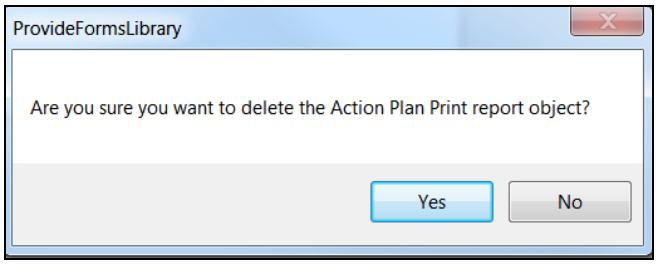
Deleting a Report Object

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

- From the Report Objects, click on the report you wish to delete. This will highlight such as:



- Then, click on Delete.
- A message similar to that below will appear:



- If you wish to delete the report, click on the Yes button.

- The report will be permanently deleted from the system.

User Manager

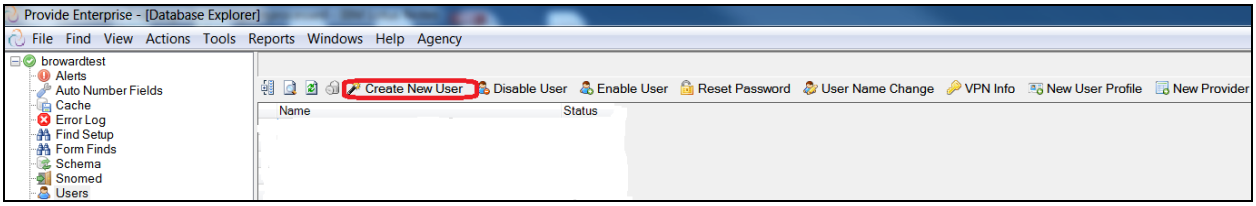
The User Manager can be used to add, delete or update existing PE Users.

Adding a New User

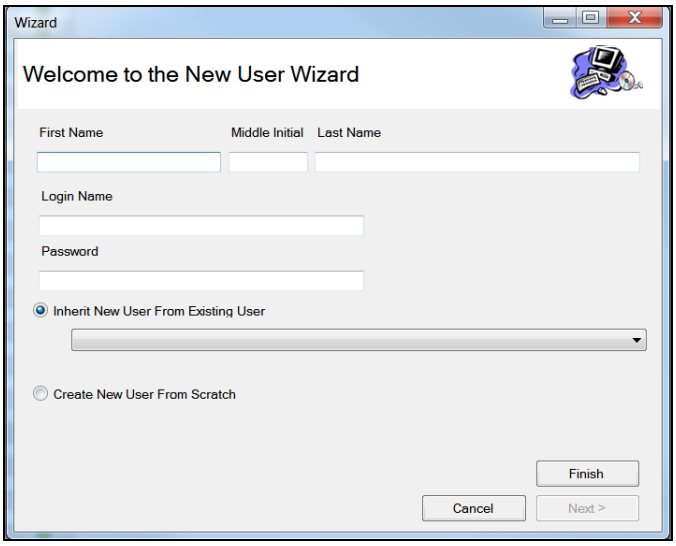
The "New User Wizard" can be used to create a new SQL User Account (assuming you have SQL authority) and then automatically create User Preferences, User Profiles and User Security Setting copied from an existing User. User Profiles can be added, deleted or updated later individually for a User. User Profiles, Preferences and Security settings can be copied from one User to another to overlay (update) the existing settings.

To use the New User Manager, follow the steps below:

- Open your "Explorer" window.
- Click on "Users"



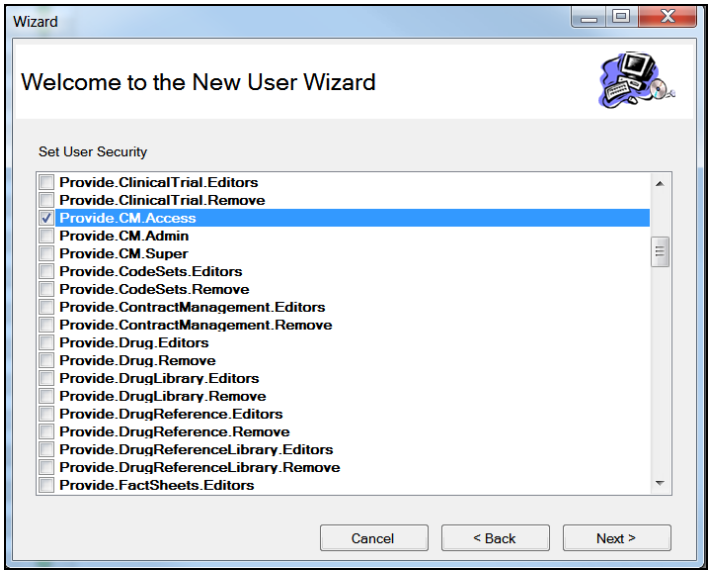
- Select "Create New User". The wizard will begin with the dialog box seen in the figure below:



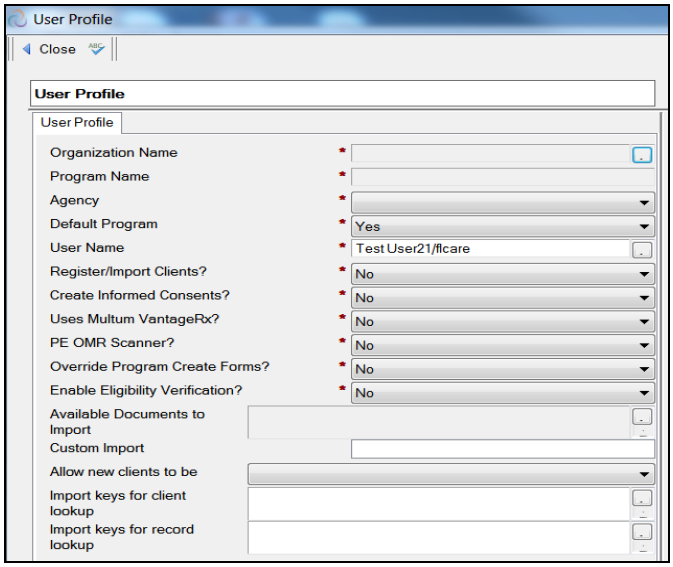
- Fill out the fields as appropriate:
  - **First Name/Middle Initial/Last Name:** Enter the User's full name.
  - **Login Name:** Enter the Login Name given to the new User.
  - **Password:** Enter the new User's password.

- **Inheriting Information from a Current User:** This gives you the ability to inherit all information for the New User from an Existing User (User Preferences, User Profiles and User Security). This makes setting up a New User very easy. To do this, simply select the Existing User from the dropdown menu.
- **Creating the New User From Scratch:** If you need to set the New User up from scratch, the "New User Wizard" will allow you to create the User from scratch.

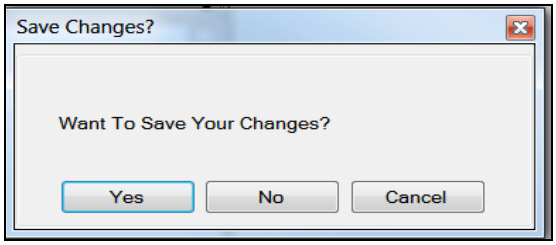
- Click the Next > button to continue. A dialog box similar to that in the figure below will appear to allow you to set the User's security level. NOTE: If you selected "Inherit New User from Existing User" above, security settings will be pre-set based on the user you selected to inherit information from.



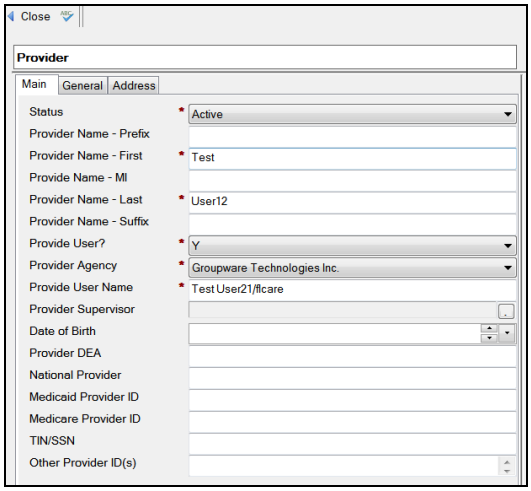
- Select the "security" settings this User should have and then click on the Next > button. A dialog box similar to the one in the figure below will appear:



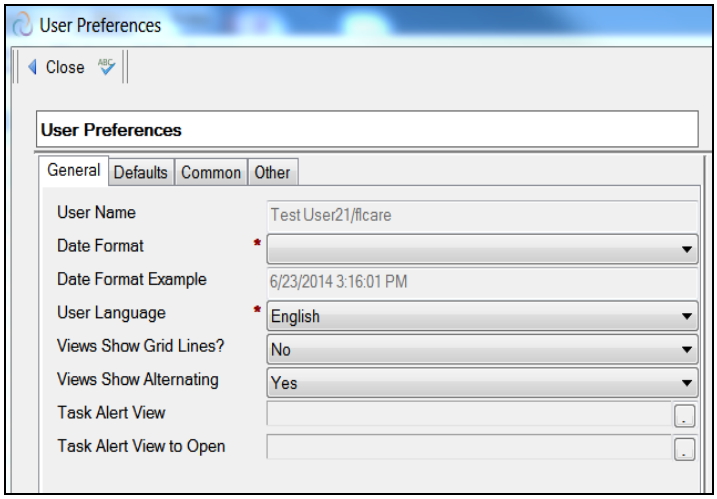
- Fill out the User Profile as appropriate. (See "Adding User Profiles" earlier in this guide for detailed information on doing this.)
- Click on the Close button when the User Profile has been filled out. A dialog box similar to that below will appear, verifying you want to save your changes.



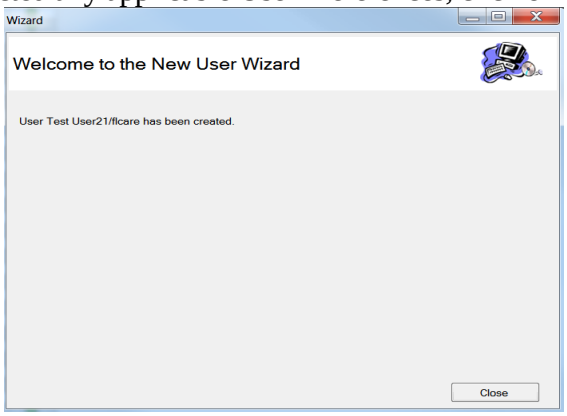
- Click on the Yes button to save the User Profile and continue to the following dialog box.



- Fill out the applicable information in the Provider Record. See the Database Administrator Guide for more information on the Provider records.
- Click on the Close button to save the Provider Record and continue to the following dialog box.



- If you would like to set up this user's preferences, fill out all appropriate information (more detailed information on User Preferences can be found in the PE User Guide).
  - After you have selected any applicable User Preferences, click on the Close button.



- Click on Close and the user account will be completed.

Managing Existing Users

As System Administrator, there are a variety of tasks you can perform in managing PE Users. These include:

- Editing a Users Preferences
- Copying User Preferences from one User to Another
- Editing User Security
- Copying User Security from one User to Another
- Editing User Profiles
- Copying User Profiles from one User to Another
- Creating New User Profiles

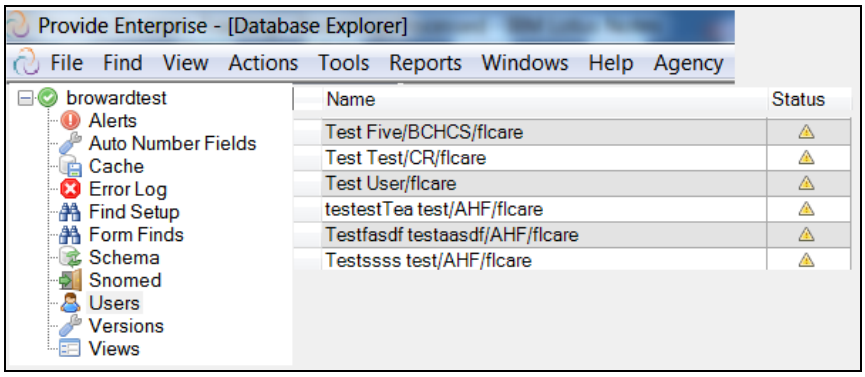
- Creating New Provider Records
- Editing Security Question
- Enabling, Disabling, and Unlocking Sql Accounts
- Removing User
- User Name Change

These will be discussed in this section of the guide.

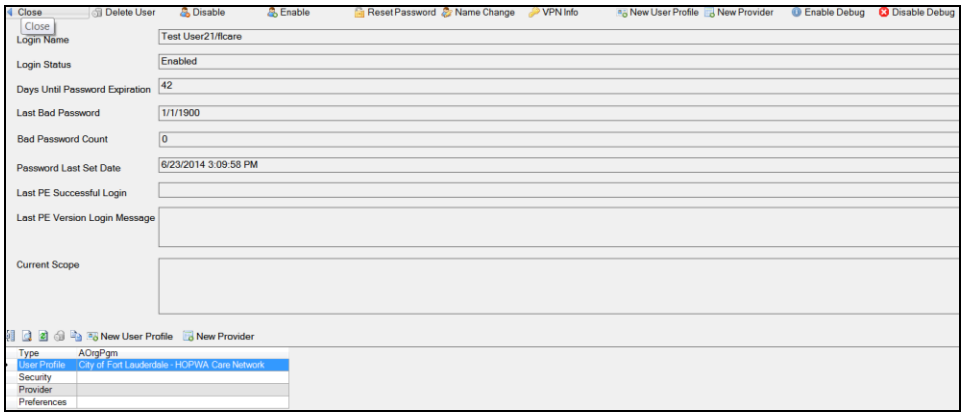
Editing a User's Preferences

As System Administrator, you have the ability to edit and save a User's Preferences. This can be done by following the steps below:

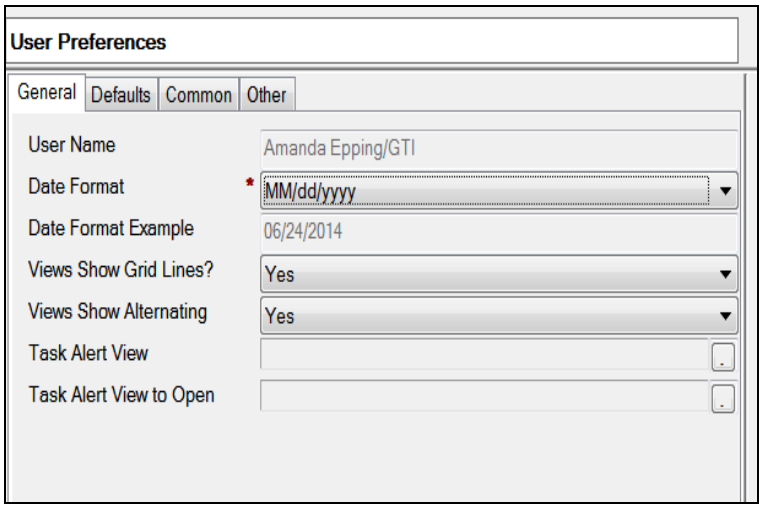
- Open your "Explorer" window.
- Click on "Users" in your Explorer window and double click on the user that needs editing.



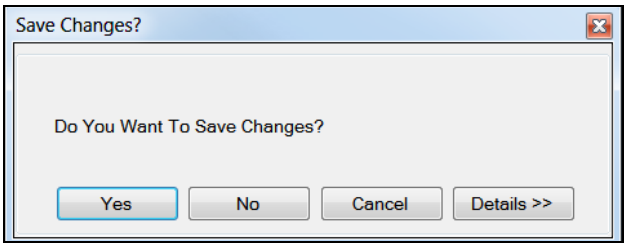
- In the View Pane, you will see all User Profiles, User Security and User Preferences for this User appear, similar to that in the figure below:



- Double click on the "User Preference" listing for the user to open their User Preferences, similar to that in the following figure:



- Make any applicable changes to the User's Preferences and then click on the Close button. You will then receive this prompt:

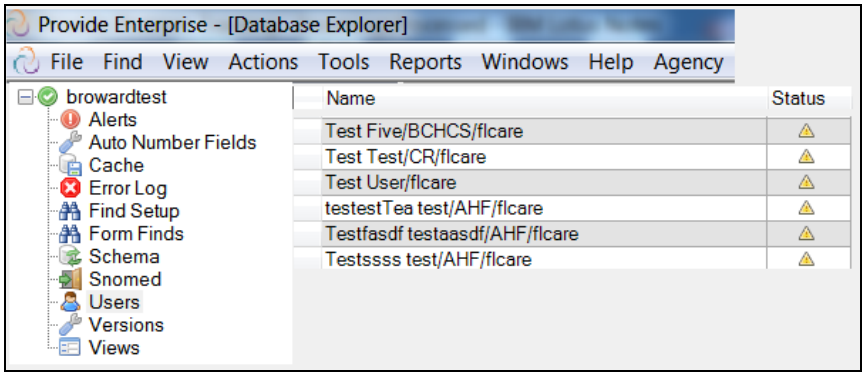


- Click on Yes to save these changes. (More details on User Preferences can be found in the PE User Guide.)

Copying User Preferences from One User to Another

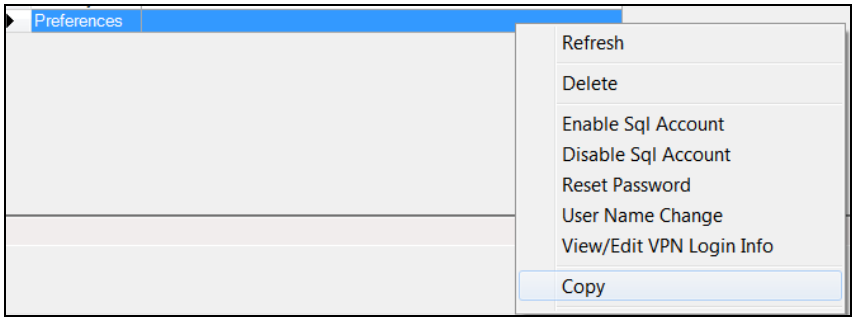
As System Administrator, you can copy User Preferences from one User to another. This makes it easy to distribute User Preferences to more than one User. To do this, follow the steps below:

- Open your "Explorer" window.
- Click on "Users" in your Explorer window (circled in the figure below).

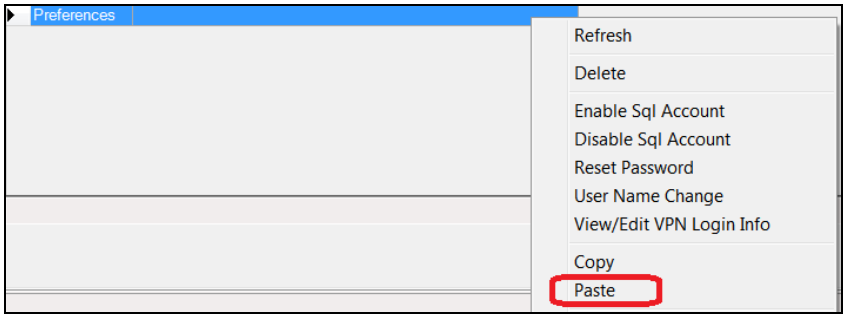


- Click on the user that you wish to copy the preferences FROM.

- Right click on "User Preference" listing for the User and select "Copy" (seen in the figure below).



- Find the User Name in the View Navigator that you want to copy the preferences TO. All of their User related information will appear in the view pane.
- Right click in the view pane and select "Paste" (seen in the figure below).

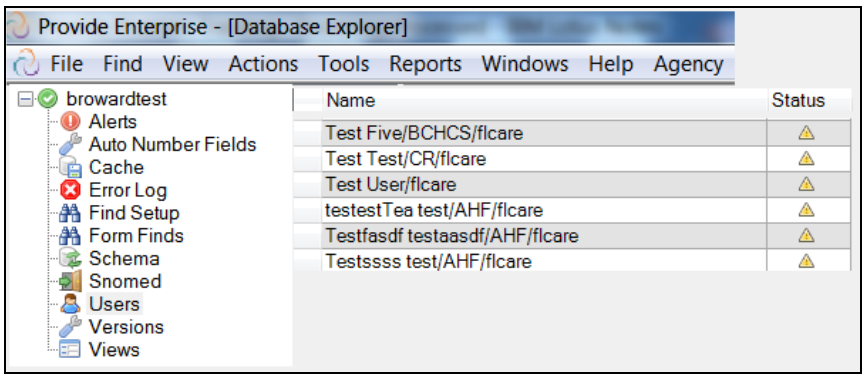


- The User Preferences will be pasted in for this User and will appear in the View Pane.

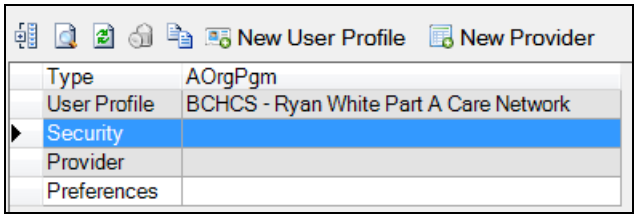
Editing a User's Security Settings

As System Administrator, you have the ability to change User Security Settings for all Users. This is done by following the steps below:

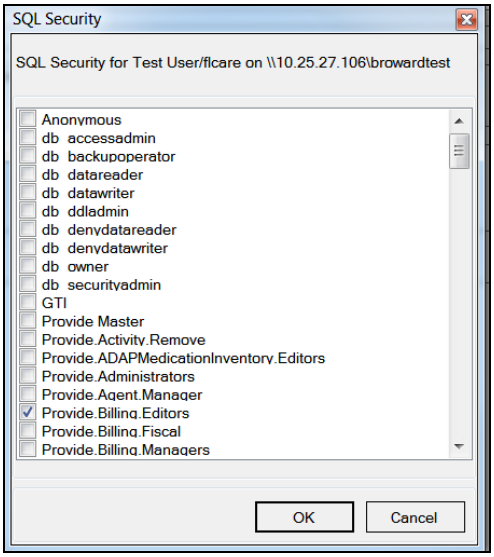
- Open your "Explorer" window.
- Click on "Users" in your explorer window.



- Single click on the User Name that you want to change security for. In the View Pane, you will see all User Profiles, User Security and User Preferences for this User appear, similar to that in the figure below:



- Double click on the "Security" listing for the User to open their SQL Security, similar to that in the figure below:

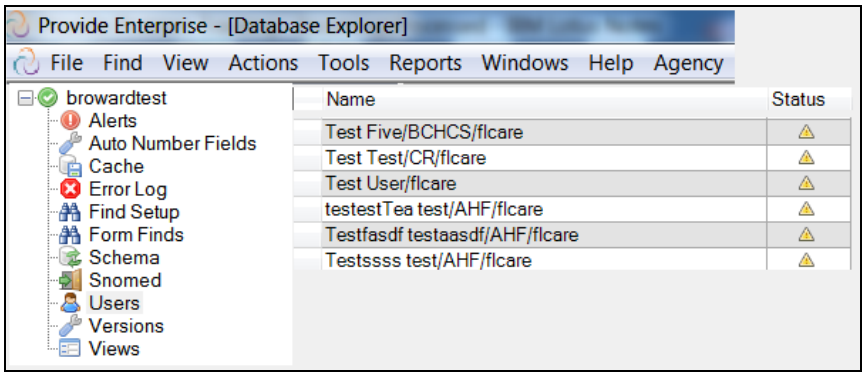


- Make any applicable changes to the User's Security Settings and then click on the OK button to save these changes.

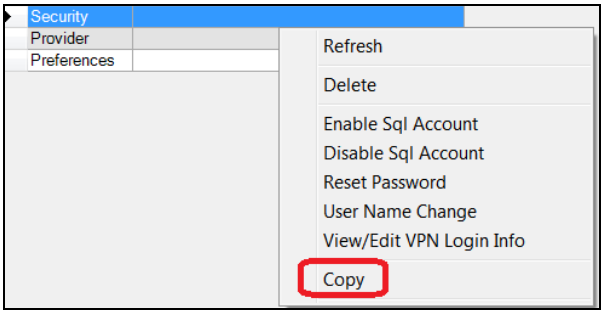
Copying User SQL Security Settings From One User to Another

As System Administrator, you can copy User SQL Security Settings from one User to another. This makes it easy to set up New Users in the system or change Security settings for Existing Users. To do this, follow the steps below:

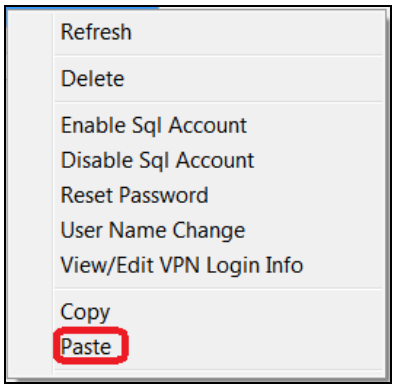
- Open your "Explorer" window.
- Click on "Users" in your Explorer window.



- Double click on the User Name of the User that you wish to copy the SQL Security Settings FROM.
- Right click on the "Security" listing for the User and select "Copy" (seen in the figure below).



- Find the User Name in the View Navigator that you want to copy the SQL Security settings TO. All of their User related information will appear in the view pane.
- Right click in the view pane and select "Paste" (seen in the figure below).

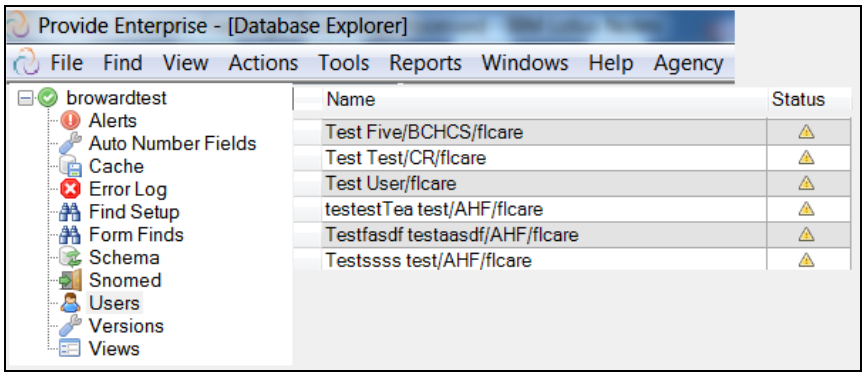


- The User SQL Security Settings will be pasted in for this User and will appear in the View Pane.

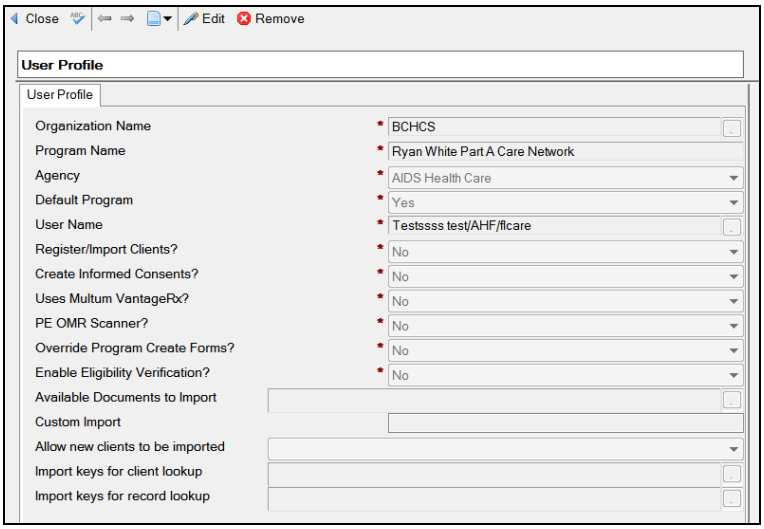
Editing a User's Profiles

User Profiles define specifically what program(s) a User would have access to and defines specifically what level of access to Client records a User has. System Administrator's have the ability to edit Current Users Profiles.

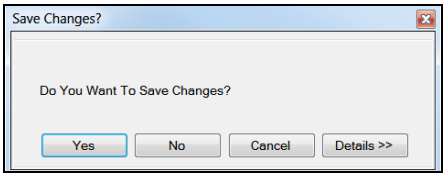
- Open your "Explorer" window.
- Click on "Users" in your Explorer window.



- Double click on the User Name that you want to edit the User Profile(s).
- Double click on the appropriate "Profile" listing for the User to open their User Profile, similar to that in the figure below:



- Click on the Edit button.
- Make any applicable changes to the User Profile and then click on the Close button to save these changes. (See the "Setting Up User Profiles" section of this guide for more details on the User Profile).
- You will then receive this prompt:

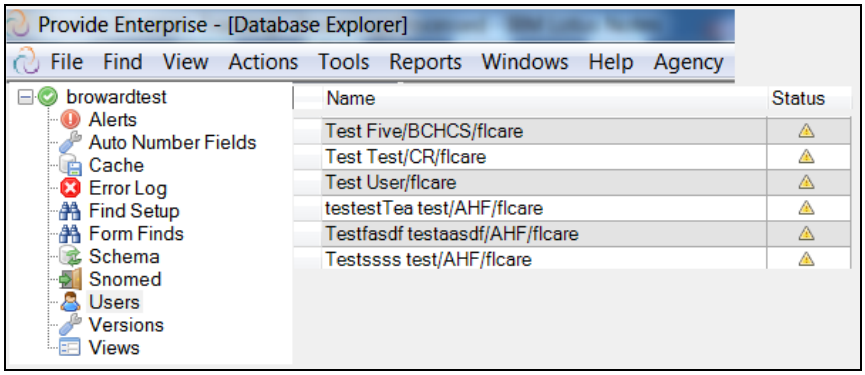


- Click on Yes to save these changes

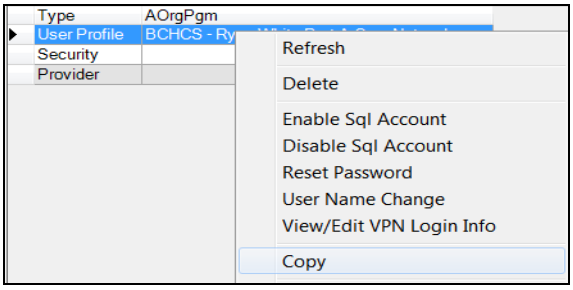
Copying User Profiles From One User to Another

As System Administrator, you can copy User Profiles from one User to another. This makes it easy to set up New Users in the system or change access to programs for Existing Users. To do this, follow the steps below:

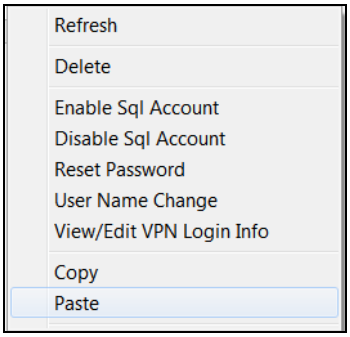
- Open your "Explorer" window.
- Click on "Users" in your Explorer window.



- Double click on the User Name of the User that you wish to copy the User Profile FROM.
- Right click on the "Profile" listing for the User for the organization/program you want to copy and select "Copy" (seen in the figure below).



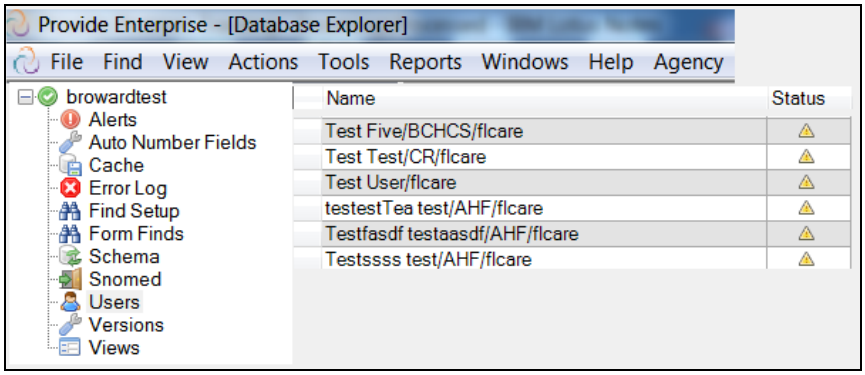
- Find the User Name in the View Navigator that you want to copy the User Profile TO. All of their User related information will appear in the view pane.
- Right click in the view pane and select "Paste" (seen in the figure below).



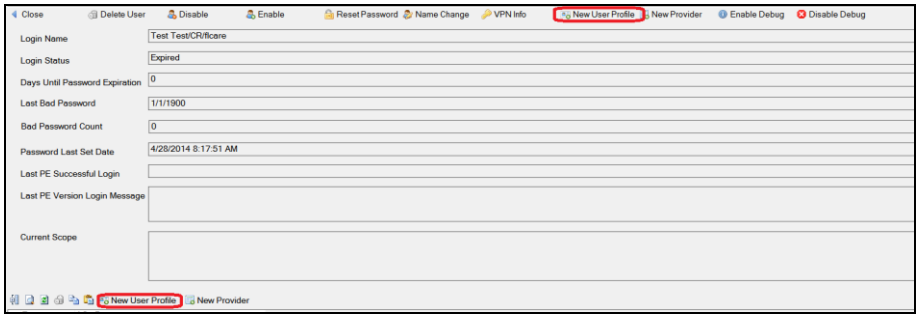
Creating New User Profiles

As discussed earlier in this guide, User Profiles are integral to the PE system. While in the Administrator Client, you have the ability to create New User Profiles when needed. To do this, follow the steps below:

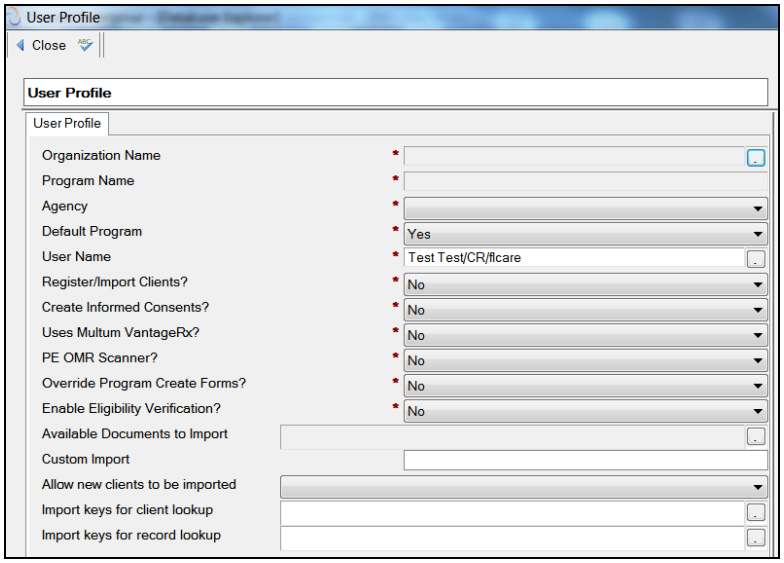
- Open your "Explorer" window.
- Click on "Users" in your Explorer window



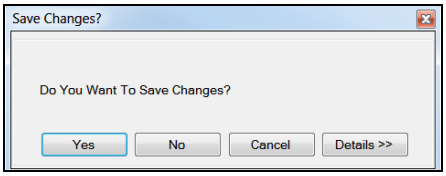
- When you have the user open, you can create a new user profile by selecting "New User Profile." There are two locations where this button can be found. See below:



- A blank User Profile form, similar to that in the following figure will open.



- Fill out the fields as appropriate. (See the "Setting Up User Profiles" section of this guide for more details on the User Profile)
- Click on the Close button to save the User Profile.
- You will then receive this prompt:

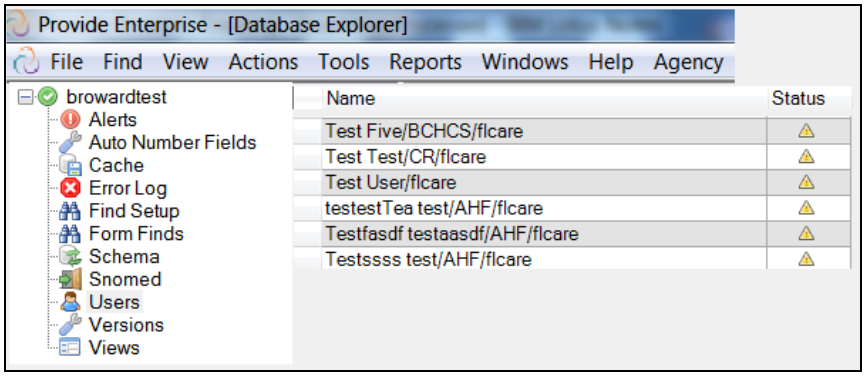


- Click on Yes to save these changes

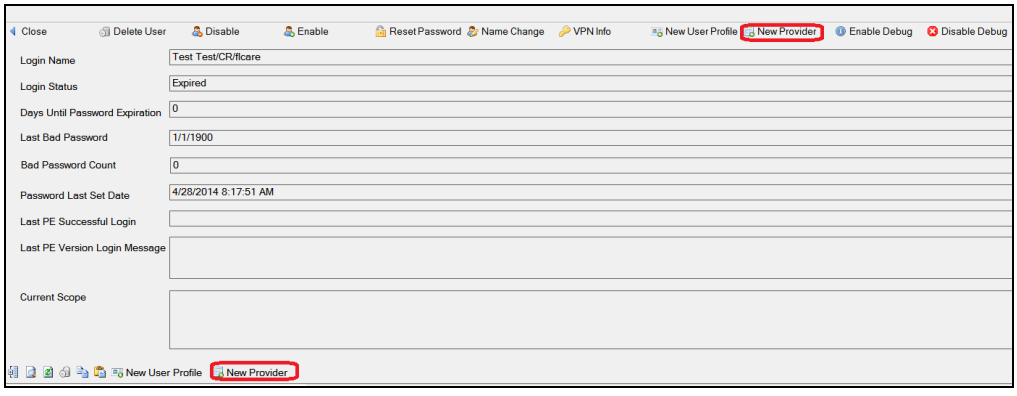
Creating Provider Records

As discussed earlier in this guide, Provider records are very important parts of the PE system. Every User should have a Provider record. You can create a Provider record during the initial new user setup process, but can also create a Provider record from the User Management section as well. To create a new Provider Record, follow the steps below:

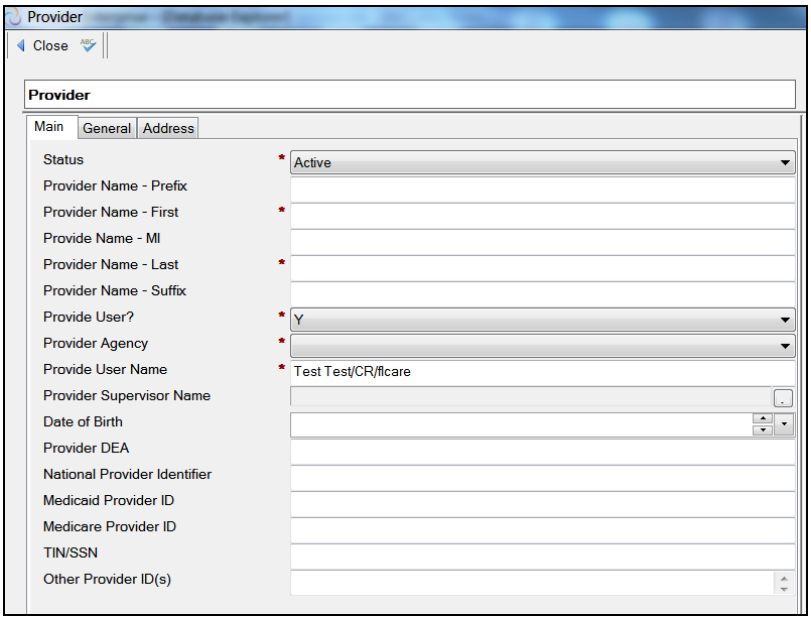
- Open your "Explorer" window.
- Click on "Users" in your Explorer window.



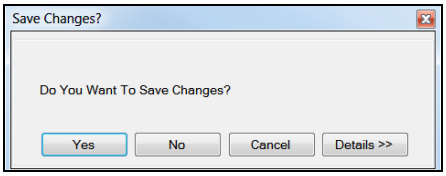
- When you have the user open, you can create a new user provider record by selecting "New Provider." There are two locations where this button can be found. See below:



- A blank Provider record, similar to that in the following figure will open.



- Fill out the fields as appropriate. (See the Database Administrator guide for more details on the Provider record.
- Click on the Close button to save the Provider Record.
- You will then receive this prompt:

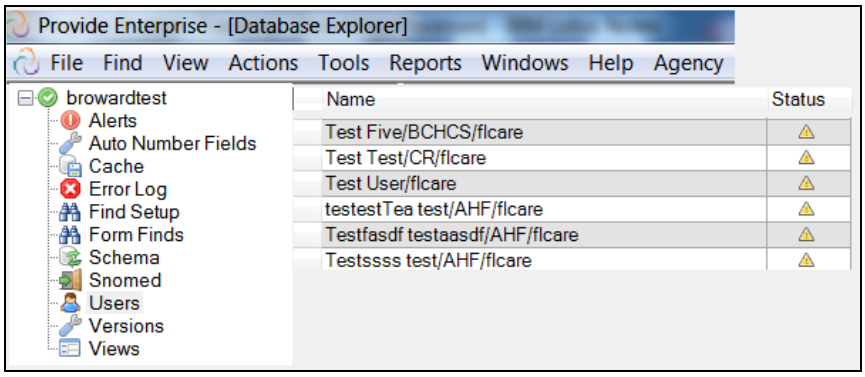


- Click on Yes to save these changes

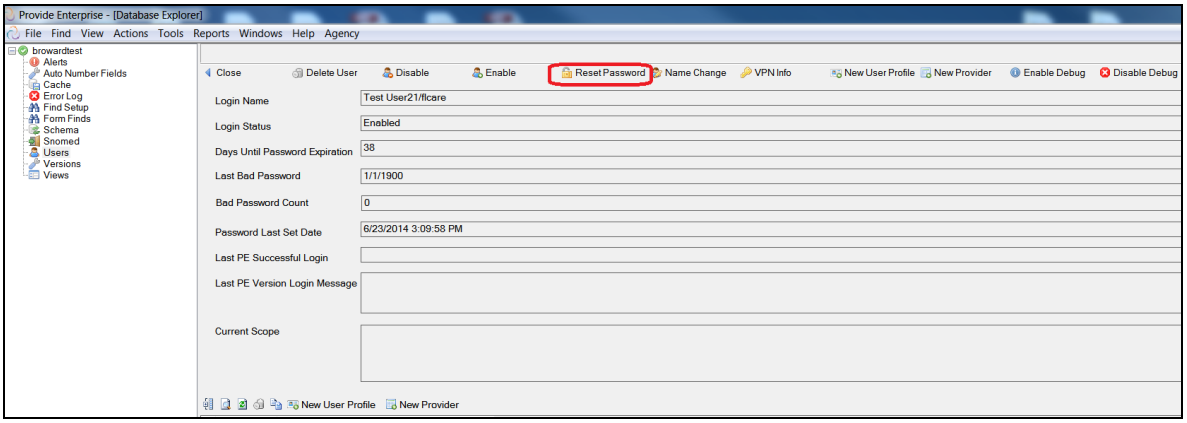
Resetting a User's Password

Occasionally, you may find that a User forgets his/her password or is locked out of their account, as System Administrator, you will be able to reset the password. To do this, follow the steps below:

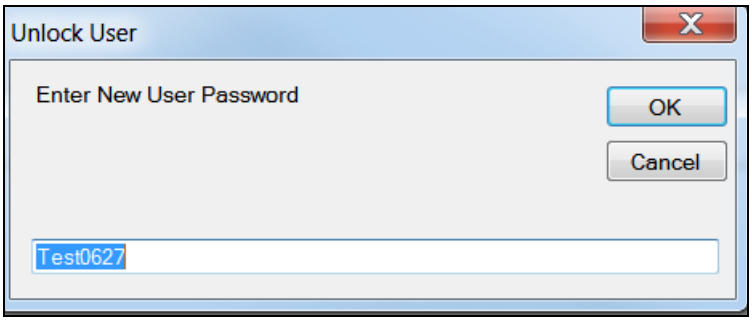
- Open your "Explorer" window.
- Click on "Users" in your Explorer window to display all of the accounts.



- Double click on the user. Click on "Reset Password."



- The following box will appear:



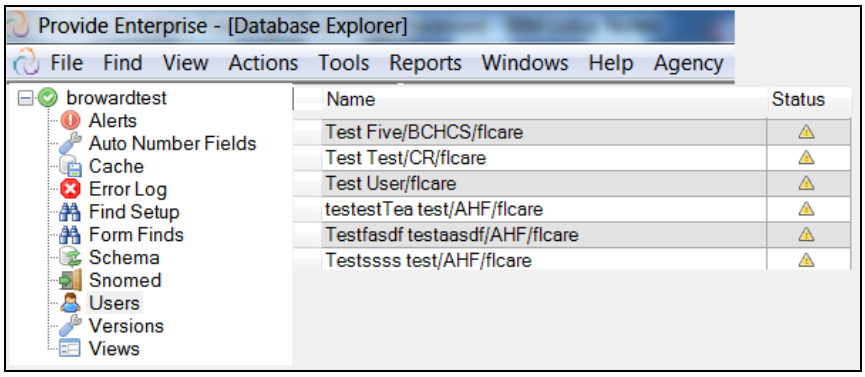
- Enter the password you would like to temporally use for the client and click

.

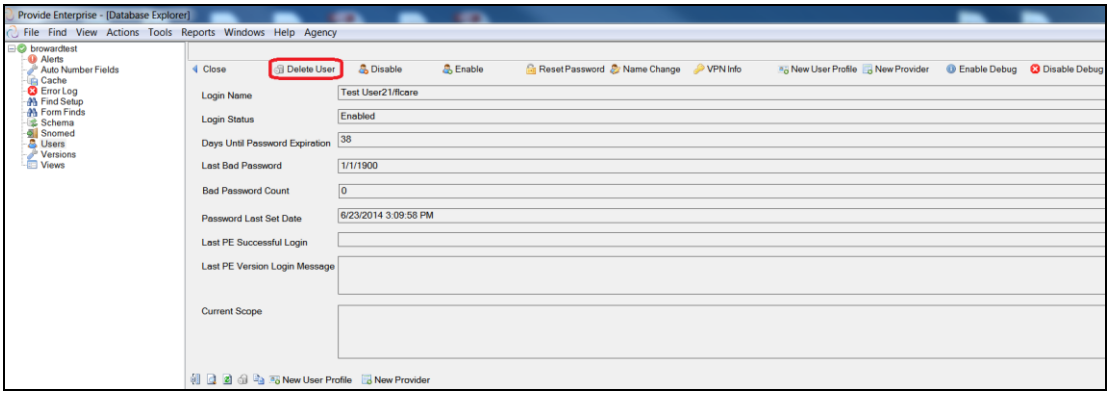
Removing Users from the System

When a User leaves an agency, it is important to remove them from the system in order to prevent access to the database. To remove a User from the system, follow the steps below:

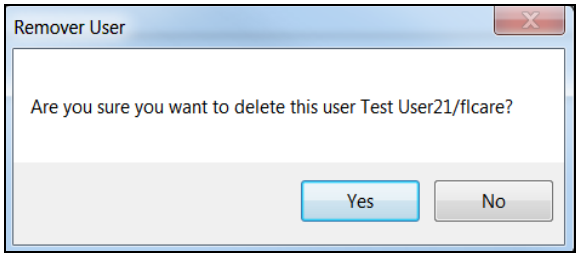
- Open your PE Administrator Client to the "Explorer" window.
- Click on "Users" in your Explorer window to display all of the user accounts.

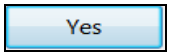


- Double click on the user and click on "Delete User."

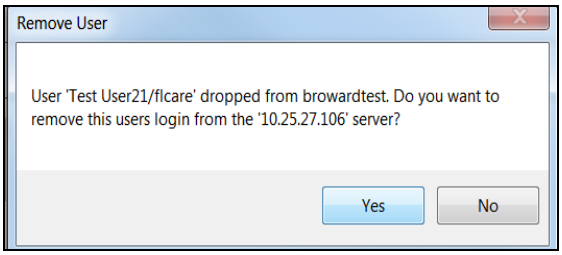


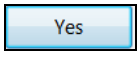
- A dialog box similar to the one in the figure below will appear:



- Click on the 

button to continue. A dialog box similar to the one below will appear:



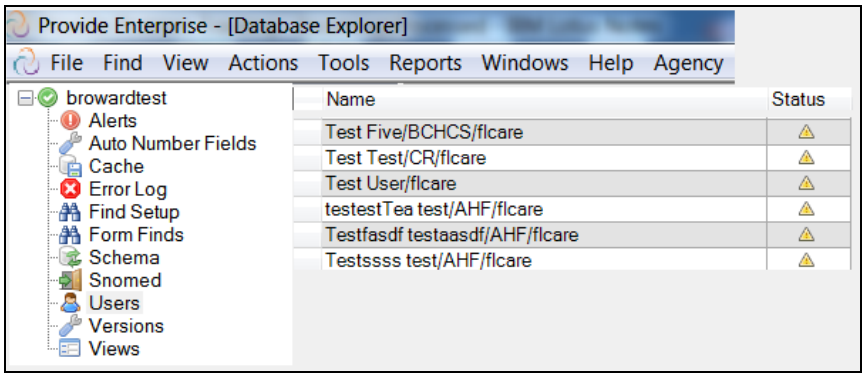
- To remove the User's SQL Server access, click on the 

button.
- The User will be removed from the system.

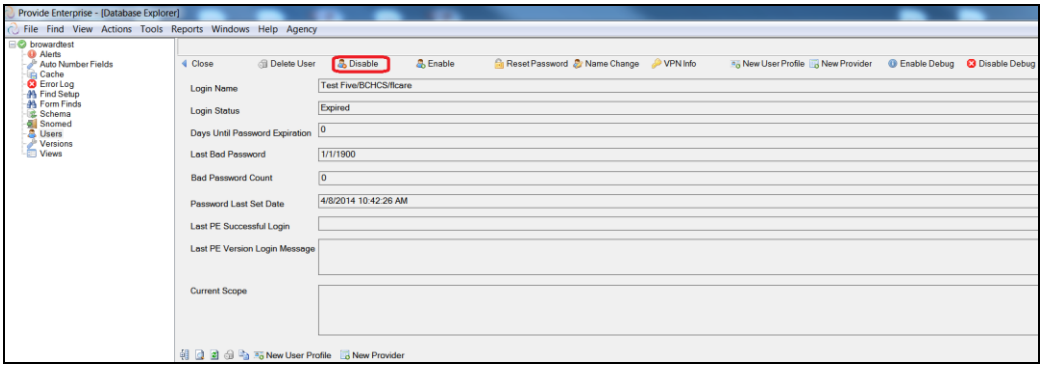
Disabling a User's SQL Account

Should you need to disable a User's access to the PE Database and to the SQL Server temporarily, you can disable their SQL Account. To do this, follow the steps below:

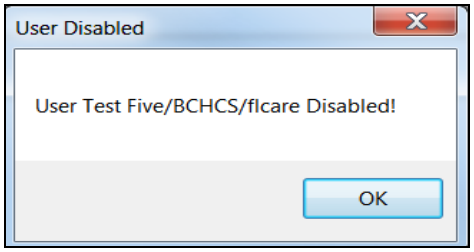
- Open your PE Administrator Client to the "Explorer" window.
- Click on "Users" in your Explorer window to display the list of users.



- Double click on the user. Click on "Disable."



- A dialog box similar to the one in the figure below will appear:

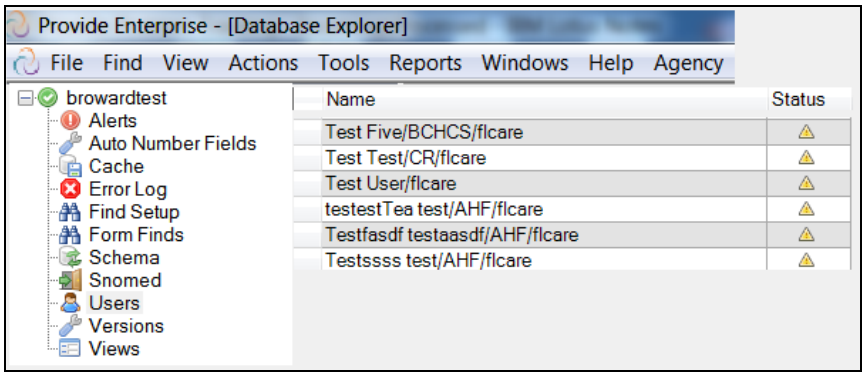


- Click on the OK button to continue

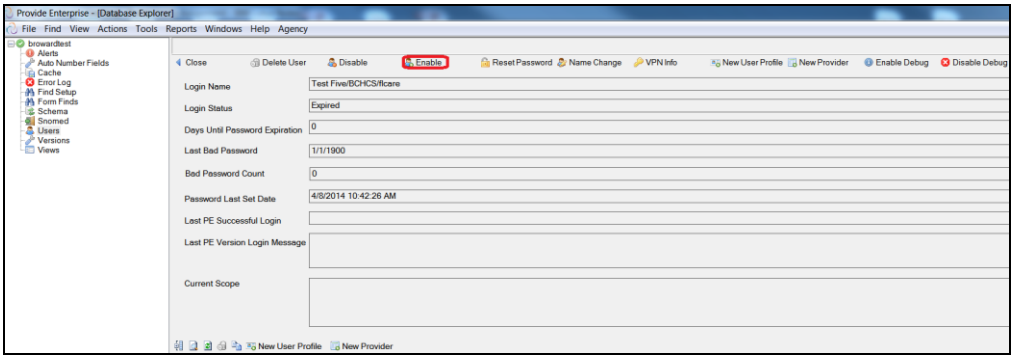
Enabling a User's SQL Account

Should you need to re-enable a User's account, simply follow the steps below:

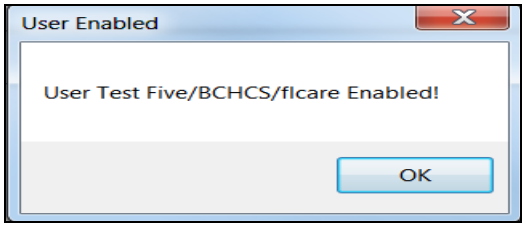
- Open your PE Administrator Client to the "Explorer" window.
- Click on "Users" in your Explorer window to display the list of users.

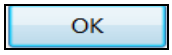


- Double click on the user. Click on "Enable."



- A dialog box similar to the one in the figure below will appear:



- Click on the 

button to continue

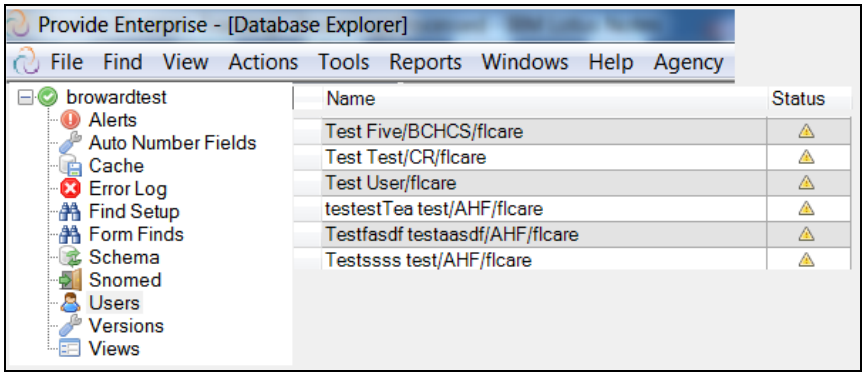
User Name Changes

The PE Administrator Client allows you to perform name changes on selected users. This function will change the following items:

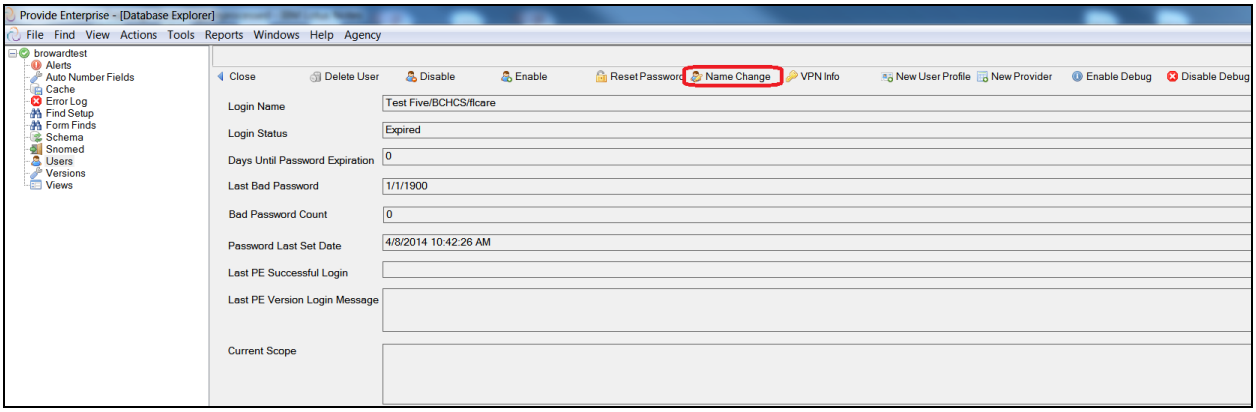
- Sql Login/User Name
- User Profiles
- Preferences
- Individual Provider record.
- Any field that is either a "Name" field or "Individual Provider" field.

To perform a User Name change, follow the steps below:

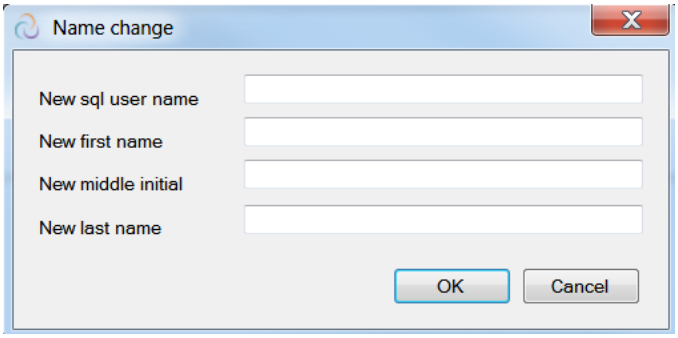
- Open your PE Administrator Client to the "Explorer" window.
- Click on "Users" in your Explorer window to display the list of users.



- Double click on the user that requires a name change.
- Click on "Name Change.

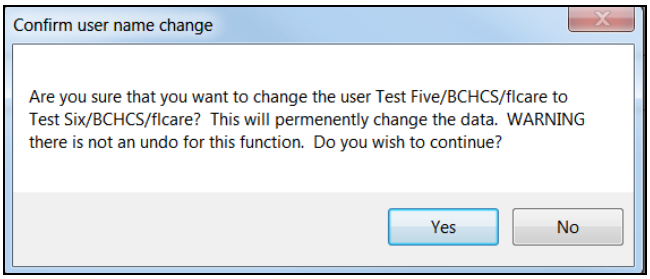


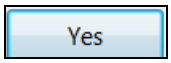
- A dialog box similar to the one in the figure below will appear:



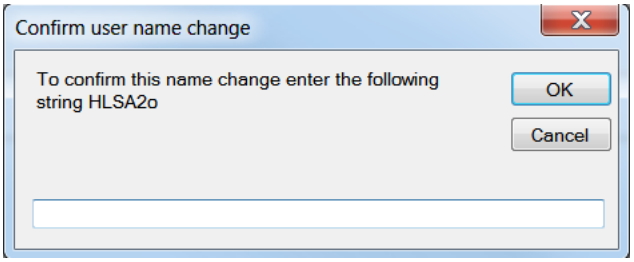
- Enter the User's new Sql Login Name.
- Click on the OK button to continue

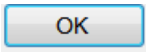
- A dialog box similar to that in the figure below will appear:



- Click on the  button to continue.

- A dialog box similar to that in the figure below will appear:



- Enter the confirmation string listed in the dialog box and click on the  button.

- After the name change is complete, refresh your user list and you should see the name has been changed.

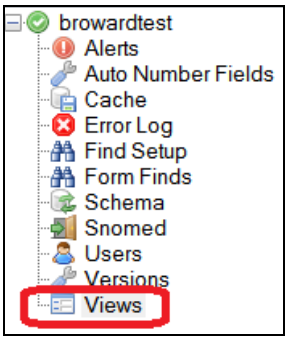
View Manager

The View Manager allows you to see a complete list of all PE Client Views (different than SQL Database Views). In addition to being able to see the Views, you can manage permissions from the View Manager.

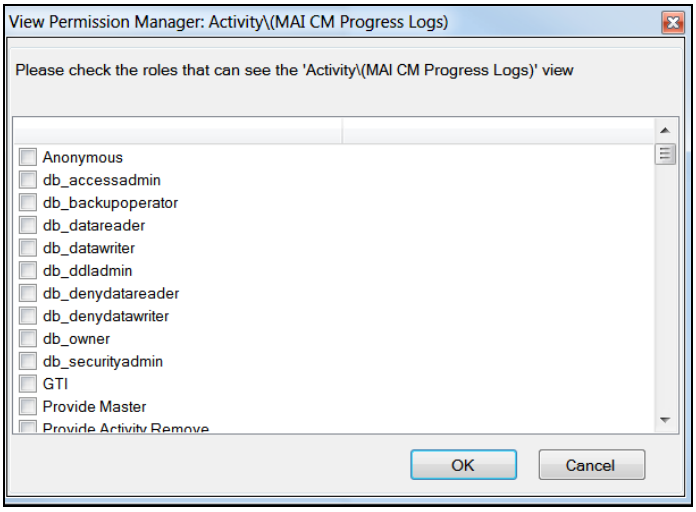
Managing Permission of Existing Views

As System Administrator, you have the ability to Manage Permissions of Existing Views. To do this, simply follow the steps below:

- Open the "Explorer" window.
- Click on "Views" in your Explorer window (circled in the figure below).



- Right click on the View you want to edit and select "Manage Permissions". A window similar to the following will open.



- Select the groups that should have access to this View by single clicking next to each group.
- Click on the

button to save your changes. You will be returned to the listing of all Views.

Chapter

6

Provide® Enterprise Agents

PE Agents are automated programs that can repeat tasks on schedule, on specific system cues or can be run manually. Agents can perform complex or simple tasks, which means the chances for error are reduced because the processes are done the same way every time. Additionally, scheduling Agents to run at specific intervals or after certain events occur ensures the action is never overlooked.

Default Agents

The PE system is designed to operate with some Default Required Agents running. Other Agents are optional based on the features used in your deployment of the system. As System Administrator, you have some control over the frequency and timing of Agents. Some of the Agents are recommended to run every hour, some every day and some weekly. The following is a table of PE Agents, what each Agent does and their default frequency.

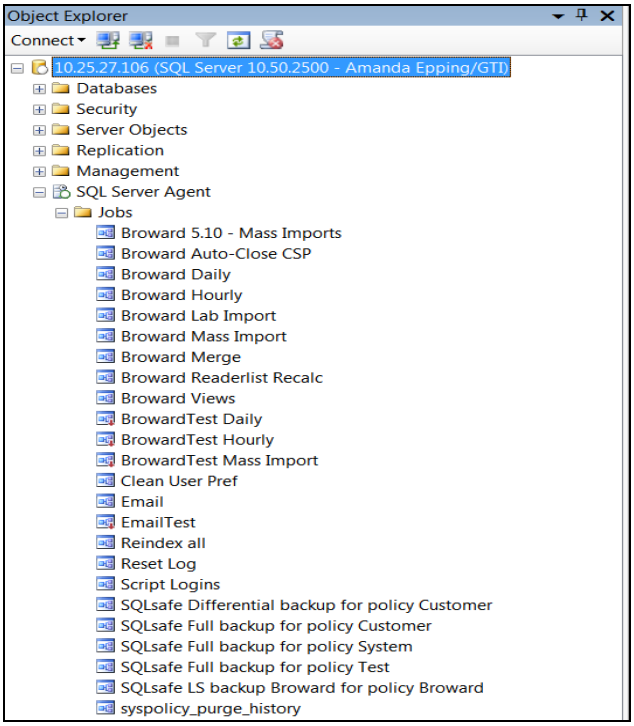
Agent Name	Description	Frequency	Required
Client Merge	This Agent processes Client Merge requests.	Every 30 Minutes	Yes
Client Unmerge	This Agent processes Client Unmerge requests.	Every 30 Minutes	Yes
Client Delete	This Agent processes Client Delete requests.	Every 30 Minutes	Yes
Process Informed Consent Transactions	This Agent processes all Informed Consent documents. It applies the appropriate security updates as Informed Consents are created and existing ones expire or are revoked.	Every 30 Minutes	Yes
Acuity Formulas	This Agent calculates the Program defined Acuity Level for every Client in the Client Database and stores it in the Client Service Profile document for the Client.	Nightly	No

Process HL7 Lab Import	This Agent is used to Import Lab Results based on “Lab Import” definitions in the Client Activity database.	Nightly	No
Required Actions	This Agent processes the Required Action Triggers in the Systems Administration Database and builds or deletes Required Action Documents in the Client Activity Database as appropriate.	Nightly	No
Process Tags	This Agent processes the Tag Triggers in the Systems Administration Database and builds or deletes Tag Triggers in the Clients Database as appropriate.	Nightly	No

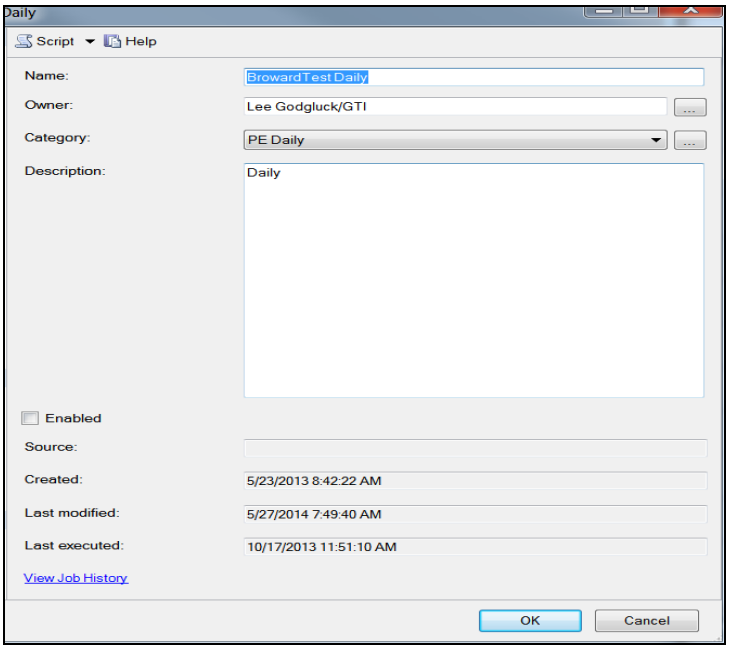
Agents - Scheduling

When the PE system is installed and sometimes after new releases of PE are applied, GTI will need to "Activate" Scheduled Agents. Generally, only GTI staff should modify the scheduling of Agents. The following steps should be followed to complete this:

- Launch SQL Server Enterprise Manager
- Open the database to the job View as shown in the following figure:

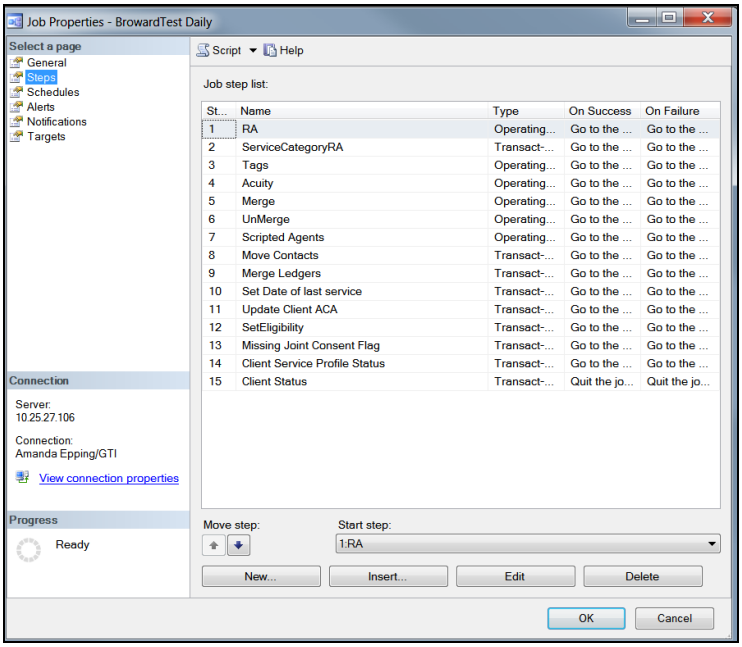


- For each Agent double click on the Agent name to open it.

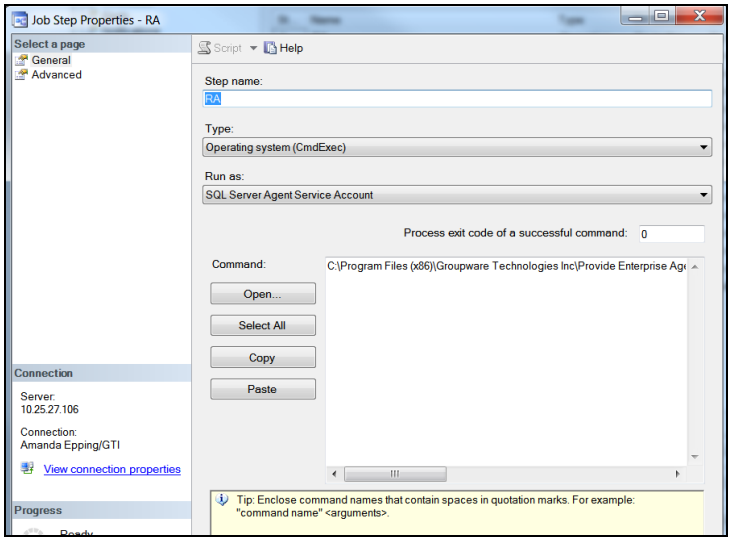


Here you can enter general information about a job.

- Verify that the Enabled checkbox field is enabled so a check mark appears.
- Change to the Steps tab, and double click on the step in the list.

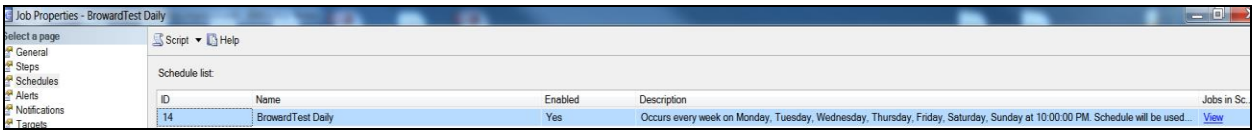


Here you can add, modify and remove steps from a job by clicking “New,” “Insert,” “Edit,” or “Delete.”

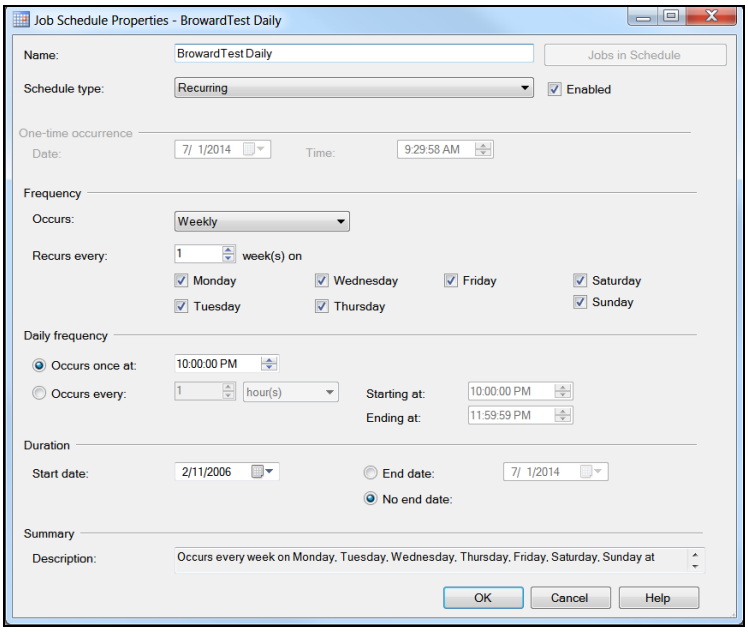


- The command window contains the command to run on the server for this step.
    - In the example above the full command is:
      C:\Program Files (x86)\Groupware Technologies Inc\Provide Enterprise Agents\5.10.10012\Provide Enterprise Agent Manager.exe REQUIREDACTIONS -S (local) -D BrowardTest -U "Provide RA Agent Manager/GTI" -P AOE2in33dam0nk
    - The first part of this command (C:\Program Files (x86)\Groupware Technologies Inc\Provide Enterprise Agents\5.10.10012\Provide Enterprise Agent Manager.exe) is the path to the PE Agent Manager and can differ from system to system based on the location provided during installation of the PE Agent Manager software. The remaining parameters are covered later in this manual.
- Close the Job Dialog Box and return to the Job Properties Dialog. Change to the Schedules Tab, and double click on the Schedule.

.



Here you can add, modify and remove schedules that the job will run.



Here you can change the type of schedule being created or modified.

- All PE Agents are run on a recurring schedule, to view or modify the schedule click on the down arrow to change the schedule type.

- Frequency and duration can also be modified when needed. A summary of the job schedule is listed in the Summary description section.

Agents – Command Line Arguments

The PE Agent Manager software can be used to run many different features of PE. You tell the Agent Manager software what feature to run with Command Line Arguments. These Arguments come after the call to the PE Agent Manager software.

Enterprise Agent Manager.exe {Feature} {-S <Server Name>} {-D <Database Name>} {-U <User Name>} {-P <Password>} {-T}

The Arguments are defined as:

- {Feature}: The Feature or Agent that is to be run. Valid options are:

Agent	Description
<AllAgents>	Will run all Agents in succession.
PROCESSINFORMEDCONSENTS	Process Informed Consents in a PE only environment.
PROCESSINFORMEDCONSENTSMIXEDMODE	Process Informed Consents in an

	environment where there is a scheduled sync of Client or activity data between a PE system and a Provide system.
PROCESSCLIENTMAINTENANCEDELETE	This Agent processes Client Delete requests.
PROCESSCLIENTMAINTENANCEMERGE	This Agent processes Client Merge requests.
PROCESSCLIENTMAINTENANCEUNMERGE	This Agent processes Client Unmerge requests.
TAGS	This Agent processes the Tag Triggers in the Systems Administration Database and builds or deletes Tag Triggers in the Clients Database as appropriate.
ACUITY	This Agent calculates the Program defined Acuity Level for every Client in the Client Database and stores it in the Client Service Profile document for the Client.
REQUIREDACTIONS	This Agent processes the Required Action Triggers in the Systems Administration Database and builds or deletes Required Action documents in the Clients Database as appropriate.
LABIMPORT	This Agent is used to Import Lab results based on "Lab Import" definitions in the Client Activity database.

- {-S <Server Name>}: The PE Server name.
- {-D <Database Name>}: The PE Database name.
- {-U <User Name>}: The User name of the account that will be accessing data in the PE database. This account must be able to see all records in the database or unexpected results will occur.
- {-P <Password>}: The password for the above User name.
- {-T}: If a trusted connection is to be used.

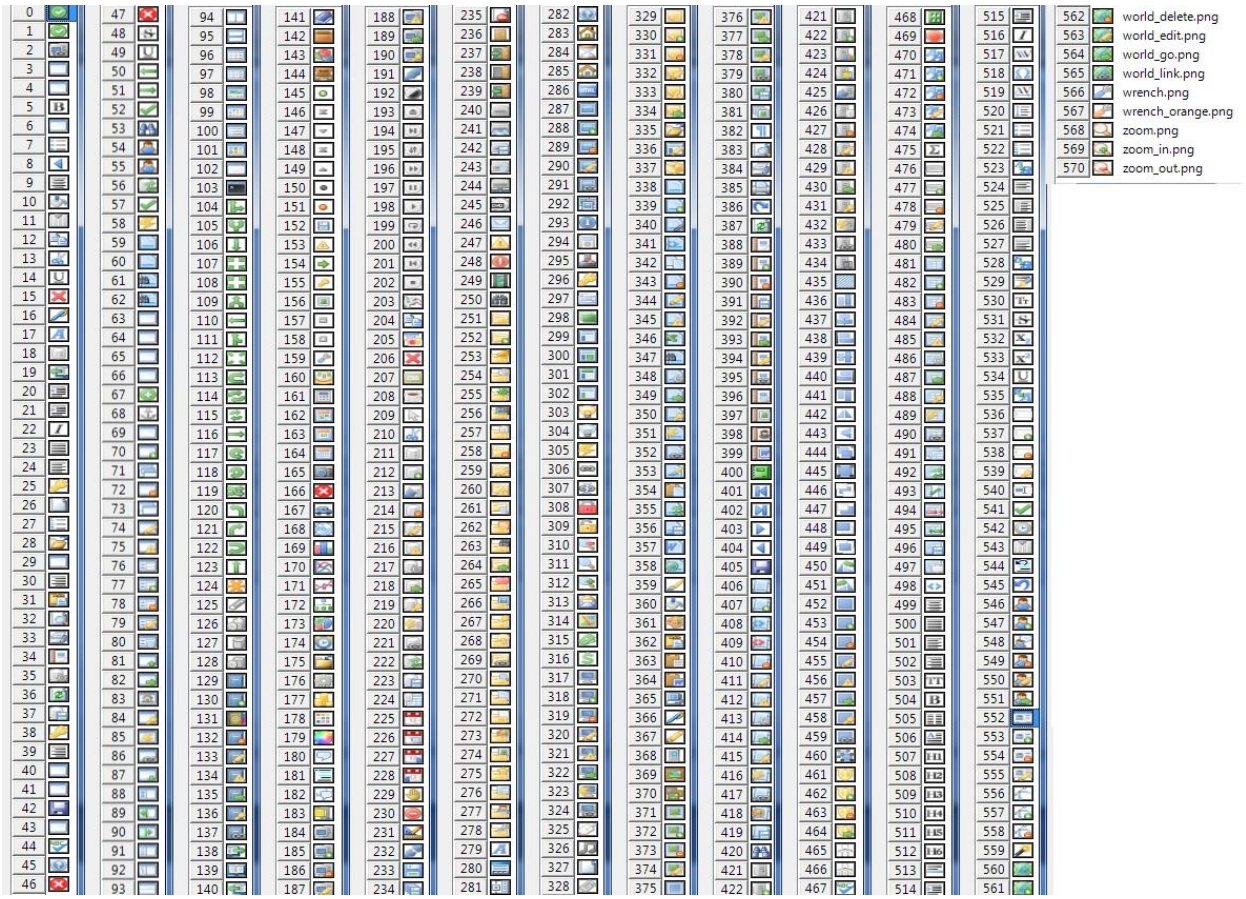
Examples:

- Run the Client Delete on the local servers PETTEST Database using the Provide Agent Manager /GTI user account.
    - Enterprise Agent Manager.exe PROCESSCLIENTMAINTENANCEDELETE –S (local) –D PETEST –U Provide Agent Manager/GTI –P Password
- Run the Acuity Agent on the PEDATABASE database on the server called PESERVER using the Provide Agent Manager /GTI user account.

- Enterprise Agent Manager.exe ACUITY -S PESERVER –D PEDATABASE –U Provide Agent Manager/GTI –P Password

Appendix

A

Provide® Enterprise Icon Library

The PE Icon Library is below for your convenience.