

ARIES Data Extraction

Intended Audience

- All ARIES Users
- Managers and Supervisors

Policy Background

ARIES contains a wealth of information on clients, their characteristics, needs, and services. Within the ARIESClient application, authorized users can run canned reports or generate custom crosstab tables. There may be times when these reporting features do not meet an agency's business needs and their users need to bring ARIES data into other software programs (e.g., Word, Excel, Access, SPSS, SAS, etc.) to transform, analyze, and/or format it.

While it is acceptable to “extract” data from ARIES, it must be done with a high level of care and caution. When working in ARIES, data are stored on ultra-secure servers. The servers are located at the California State Data Center in Sacramento. However, when users extract data from ARIES, those data are no longer encrypted. It is critical that users only save ARIES data to secure and encrypted locations.

Users who extract data from ARIES continue to bear the responsibility for safeguarding the confidentiality and security of the data even though the data are in other software programs. Any breach of the confidentiality or security of ARIES data must be reported immediately as stipulated in ARIES Policy Notice No. B1 regarding Security Incident Reporting.

Procedures

The procedures outline five methods for extracting data from ARIES:

- Copying and Pasting into Other Software Programs
- Importing Webpages into Microsoft Word
- Exporting Reports from ARIESClient
- Exporting Data from ARIESReport/Export
- Printing from ARIES

With each of these methods, users are responsible for the security of those data, using proper security measures such as encryption and passwords, and limiting access to personnel on a need to know basis. Users should only save data in an encrypted format, either at the individual file level or at the hard drive level. Users should never e-mail unencrypted data files to other providers or administrative agencies.

Copying and Pasting into Other Software Programs (e.g., Word, Excel, etc.)

To quickly incorporate ARIES screens or reports into other documents, users can copy and paste directly from their browser into other software programs such as Microsoft Word or Excel. To do so,

- Use the cursor to highlight the desired text.
- Select Copy from Internet Explorer's Edit Menu or press CTRL+C.
- Next, open or switch to the other software program.
- Select Paste from program's Edit menu or press CTRL+V.
- The contents copied from ARIES will retain most of its formatting and table structure. Additional formatting can be applied to the new document.

If saving the new document, the user must ensure that the file is saved to a secure, encrypted location.

Importing Webpages into Microsoft Word

Users can save an entire webpage and import it into Microsoft Word (version 2000 or higher). To do so,

- Go to the desired webpage.
- Select Save As from Internet Explorer's File Menu.
- When saving the webpage select a secure location to save it to and select Webpage, HTML Only as the file type. Hit the Save button.
- Next, open or switch to the Microsoft Word document. Select Open from the File menu and select the saved HTML page.
- Within Word, additional formatting can be applied to the document.

If saving the Word document, the user must ensure that it is saved to a secure, encrypted location.

Exporting Reports from ARIESClient

ARIES allows users with the proper permissions to generate reports from their agency's records. Reports are used for summarizing services, managing clients, demographic analysis, planning work, and analyzing budgets. ARIESClient includes a selection of commonly used reports as well as a crosstab wizard for running basic custom inquiries.

Reports can be viewed on the screen, printed directly from ARIES, or copied or exported into other software programs. To export a report,

- Enter the report parameters (filters).
- Click the Export button.

- From the Export Format dropdown list, select one of the three file formats: (1) Extensible Markup Language (XML), (2) Text, tab-delimited, and (3) Text, comma-separated.
 - XML is the default choice as it is the most reliable in preserving the report's data and format types. If exporting to Microsoft Office, always export in XML. The Text, comma-separated option produces a comma-separated values (CSV) file which can be opened directly in Microsoft Excel.
 - Older applications may not be compatible with XML. In this case, select "Text, tab-delimited." If encountering problems importing this format data into the software, try "Text, comma-separated."
- ARIES generates a file based on the format choice and creates a link so that the user can download it to his computer. With the mouse, click the link and choose the "Save Target As" option to save the file to the computer.
- When the user saves the file, a window opens where the user can rename it for his own filing purposes.
- The user can then open the file in another software program like Microsoft Word, Excel, Access, SPSS, or SAS to format and/or analyze.

Exporting Data from ARIESReport/Export

ARIESReport/Export is for advanced users who want to create customized ad hoc reports or export data files for use in other software programs. Only authorized users with the appropriate permission levels and/or access to the ARIESReportExport application can perform exports.

There are two methods for exporting data:

- If the scope of the data is fairly small, an Ad Hoc Report in ARIES that contains the desired data can be created. When the report is run, the user may export the report results as XML or comma- or tab-delimited text.
- If the data scope is larger, there is also the option to export all data from an agency. This export literally contains all data for all clients who received a service within a date range, as well as their services. The export format is XML or comma- or tab-delimited text, but XML is far easier to process.

Data exported from ARIESReport/Export by either of the above means are not encrypted. It is the sole responsibility of the end user to safeguard any data exported from ARIES.

Printing from ARIES

While printing is not data extraction per se, the user is still responsible for appropriately monitoring the security of the data on those printed documents. Printed reports or screen shots that contain client information are subject to the same security requirements as medical records, and should receive the same protection. Failure to do so is a violation of CDPH policy and Health Insurance Portability and Accountability Act (HIPAA) regulations.

Compliance Monitoring

The State Office of AIDS and administrative agencies may periodically monitor both the system and user activities for purposes including, but not limited to, troubleshooting, performance assessment, usage patterns, indications of attack or misuse, and/or the investigation of a complaint or suspected incident.

Additional Information

- ARIES data can be exported from ARIESReport/Export and imported into Microsoft Access for further analysis. For instructions on how to do this, please go to www.projectaries.org, > Resources/Supporting Documentation, and select the document called Importing into Access.
- Providers needing assistance with the any of these data extraction method may consult the ARIES User Manual by pressing the F1 key while in ARIES. The ARIES Help Desk is also available at 1-866-411-ARIES (2743).

Related Policies

- ARIES Policy Notice No. B1 regarding Security Incident Reporting
- ARIES Policy Notice No. B3 regarding Computer Workstations
- ARIES Policy Notice No. B4 regarding Mobile Devices