

Exporting ARIES Data, Importing into Microsoft Access

1. Start by logging in to ARIES Report/Export. After you log in, click on "Export" in the black menu bar at the top of the screen.
2. You will see a screen similar to the PDF file attached. For Export Format, select "XML" (there are other export formats, but XML works best with MS Access). For Service Date, select "Between" from the dropdown, then enter the desired date range.
3. In the Export Files list, select "Demographics" (you can only export one type of data at a time -- see #7 below). Next, click the <Export> button and wait for ARIES to prepare the export file. When the file is finished, its filename will be shown on the screen, and a <Download> button will appear next to the filename. Click the <Download> button and save the file to somewhere on your local PC or network.

PLEASE NOTE: THE FILE CONTAINS ALL CLIENT DATA IN UNENCRYPTED FORMAT, INCLUDING ALL CLIENT IDENTIFIERS (name, address, phone, SSN, etc). THE END USER (you) ASSUMES FULL RESPONSIBILITY FOR THE SAFETY AND SECURITY OF THE DOWNLOADED DATA.

4. Open MS Access and create a new blank database. Go to the Tables window, and right-click on a blank area of the window. From the menu that appears, select "Import."
5. A standard Windows file dialog box will appear. In the lower dropdown (File Type) select "XML". Then, navigate to the folder where you saved the downloaded file, and double-click on the filename (note: you must have the Access data conversion plug-ins installed to import XML data).
6. After a moment or two, MS Access will display an "Import XML" dialog box containing a "tree" of tables. There is no need to make any adjustments here, just click the <OK> button. MS Access will add all the tables to your database, and display a message when the import is complete.
7. So far, you have imported only Demographic data. If you also want Service data (for costs, etc), you will need to repeat most of the steps above, with a few changes:
 - A. Go back to ARIES Report/Export, go to the Export page, enter the same parameters as before, only this time select "Services" for the File Type. Export the data and download the file.
 - B. Repeat the MS Access import process, importing the Service export file into the same database as you used for Demographics.
 - C. After you import the Services data, you will notice that there are some duplicate tables in the database, such as Agency, Agency1, Staff, Staff1, etc. You can delete all of the tables that end with "1". The reason for these duplicates is that both the Demographic data and Service data contains references to Agencies, Staff, and other tables, and those tables are included in both the Demographic export and the Service export.
 - D. MS Access will import all the data as text fields. To perform calculations on the data, you will need to change the data type for some fields. For numeric fields, simply editing the table design and changing the data type will work. However, for date fields, you must take an extra step before changing the data type. The date export from ARIES includes both the date and the time in a single text string. The left 10 characters represent the date. You will need to strip off the time component of the data first, leaving only the first 10 characters. A simple SQL statement will work, such as: UPDATE CD4 SET cd4Date=LEFT(cd4Date,10). After doing this update, you can change the data type and the data will convert properly. Note that you need to do this **ONLY** if you want to perform calculations on the date fields, and **ONLY** for the date fields you need to use.