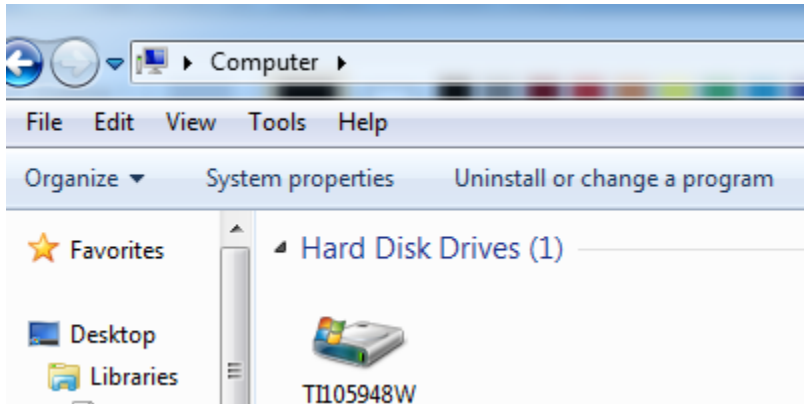## Part 1: Create RSR export folder or remove existing files from the RSR folder

1. Open "My Computer" or "Computer" on your machine.

2. Locate and open the local disk drive, "C" on your machine.

3. Check the "C" drive carefully to determine if you have a folder labeled, "**RSR**".

4. If you do not have this folder, create the folder on your machine. The folder name, **RSR,** should be in ALL CAPS and have no extra space or characters. Then proceed to Part 2 (below on the next page).
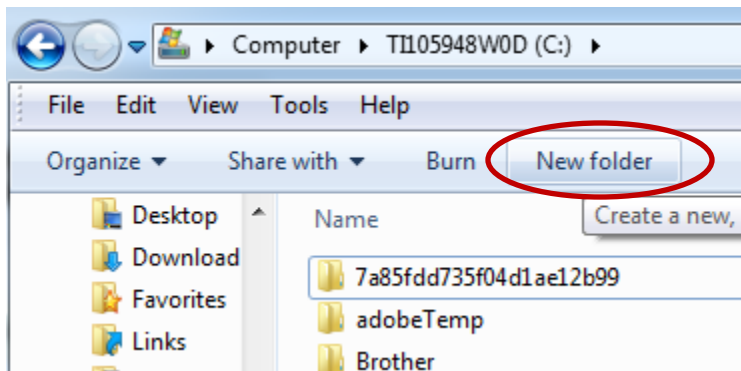

5. If you already have a folder labeled, **"RSR",** open the folder and delete all files in the **RSR** folder. Then proceed to Part 2 (below on the next page).
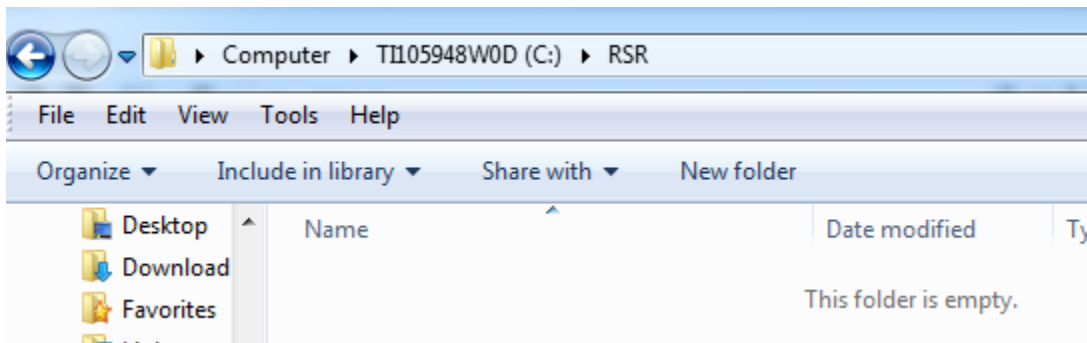
Part 2: Editing and Running a Saved RSR Report Template

Once you have saved a Report Template, it is easy to access it at a later date so that you can re-run it for the same date period or for a new date period without having to set up a new report template.
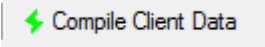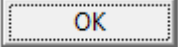
- From within Provide® Enterprise open one of the Reporting Views, using the navigation from the Windows Toolbar (*View – Reporting – Report Template…*), similar to that seen in the figure below:
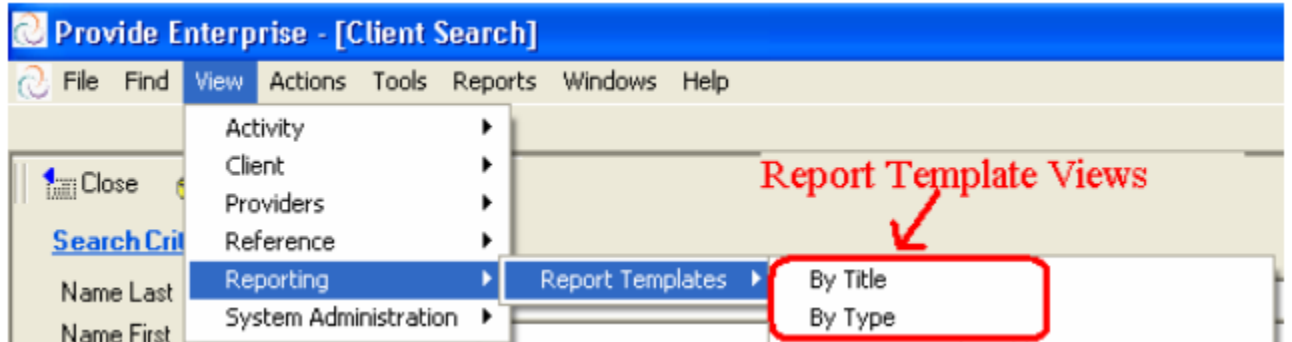

- Find the RSR template that you want to run and double click on the template. It will open up on your screen and will look similar to that in the figure below.

- Click on the ![Edit] button to edit the report template. Change any necessary fields, such as the Start and End Dates.

- After you have edited all of the appropriate information, click the ![Compile Client Data] to compile the client data that will be used throughout the remainder of the reporting process. After the data has been compiled, you will receive a message similar to that in the figure below. Simply click the ![OK] button to continue working with the template.
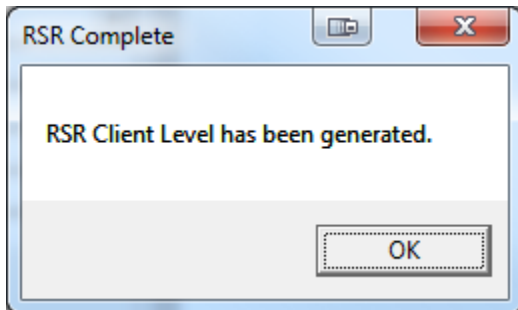
- NOTE: Once you have compiled the data, you can use the other buttons in the template, without having to re-compile the data each time. If you close out of the report template or make updates to data contained in the report, you will, however, need to Compile the client data again.
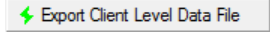
- Once you have compiled the data, you can run other reports based on your RSR client level data. These are discussed in the section below entitled "Running Ryan White Reports from the RSR Template".

- After you are done working with this report template, simply click on the ![Close] button. A message similar to the one below will open.
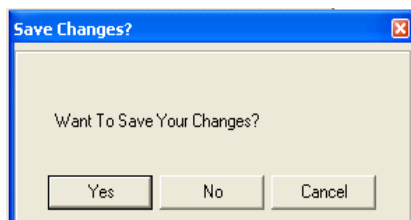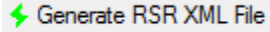

- Click on the ![Yes] button if you wish to save the template. Saving the template will ensure that you can re-run the export at a later date, making only the necessary changes in the date range of the report, without having to setup a new template.

Running Ryan White Reports from the RSR Template

Once you have created and/or edited a saved RSR Report Template and Compiled the RSR Data, you can generate either a Client Level Data file (in a tab delimited text format that can be used in Microsofot Excel) and/or the Client XML file that you will upload directly to the HRSA web site.

- To create the Tab Delimited Client Level Data File, click on the [Export Client Level Data File] button. The file will be created and saved to the location that you specified in your report template for the "Client Level Output File". After the file is generated, you will get a message similar to that in the figure below:
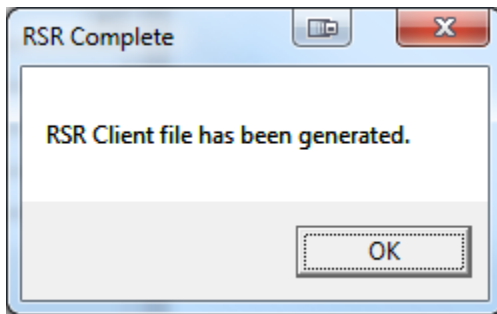
- To create the actual RSR Client file that you will upload to HRSA, click the [Generate RSR XML File] button. The XML file will be created and saved to the location that you specified in your repot template for the "RSR Output File".
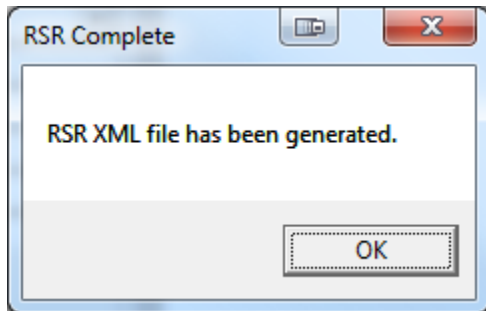
- NOTE: The "Compile Client Data" must be run prior to attempting to generate the client level data file or the XML file.

- After you have run the RSR, you are then able to run the RSR XML Extract. To do this, click on the [Run RSR] button to run the report. When the report has finished, the Ryan White Client Level Report (RSR) will be placed in the file you specified in your template.

- Currently there are three different print outs that you can generate from within the RSR Template. These include:
  - Print\Completion Report: This will generate a report very similar to the completion report summary that HRSA's web site provides after your Client XML file has been uploaded.

- o Print \Completion Detail Report: This report provides the detailed client level information related to the Completion Report. (For example, if your completion reports lists clients missing Enrollment Status, the Completion Detail Report will list out these clients).
- o Print\Validation Checks: This report performs the validation checks for errors, warnings, and alerts recommended by HRSA to ensure accuracy in your RSR submission.

Part 3: Create RSR export folder or remove existing files from the RSR folder

Correct the errors that are indicated by the RSR Completion Detail and Validation reports. There may be new errors that the previous PDR Template did not detect. Remember to back date when required to report information, "as of the end of the reporting period."

Note: You should one of each error type, then re-run the Completion Detail and Validation Reports to verify that you are correcting the errors properly.