



# **Extendable Audit Round 6**

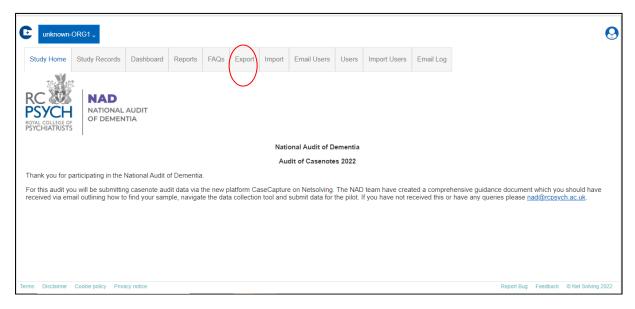
# Exporting your data on CaseCapture by Netsolving Plus importing data in bulk Guidance 2023

#### Contents

Exporting data	2
Importing data	4

# **Exporting data**

To view all your raw data you will need to export it.



When you select the export tab you will be directed to the export data page.

**Please note** to export the data, you will need to install a tool like 7-zip, or another appropriate software, which allows for **encrypted** files to be opened.

You will be asked to enter a password of your choice which will be used to open the excel spreadsheet containing the data, as this is password protected.

More information explaining this can be found at the bottom of the export page under 'Exporting Information':



Define the data that you want to export using the 'Select the date field you want to compare against' drop down list (Date record was created, Date record was locked or Date of admission). You will then need to set the data parameters for the data that you want to export. The example below would export all records created from 19<sup>th</sup> September to 26<sup>th</sup> September 2022.

Please note you can only export locked entries.

Once you are ready to export the data, click on 'Export locked study data to csv' and 'Export data item key' for the questions.

The downloaded files should appear in your downloads, or at the bottom of the screen.

🚯 RCPsych Intranet 🛕 Linear regression a 😻 RCPsych CCQI (@rc 🍥 Aloo Beans Recipe   💁 Email - C Hood - O 💶 Honey & Co's roast	Downloads 🗈 Q … 🔗	>
Study Home Study Records Dashboard Reports FAQs Export Import Email Users Users Import Users	DataKey_NAD_2022_2022-09-26.csv Open file	
Export National Audit of Dementia 2022 data for unknown-ORG1	NAD_2022_NAD_2022_2022-09-26-03-39.zip	
	Users.csv Open file	-
All files will be <u>encrypted</u> to the AES-256 standard and require a password. In order to open the file you will need to use a tool like 7-zip (yww.7-zip org) that allows AES-256 encrypted files to be opened (AES-256 zip files cannot be	Sites.csv Open file	
opened in windows). You will need to extract the files from the zip folder before opening them in order to view them.	See more	
Please enter a password below of at least 8 characters		
Select the date field you want to compare against		
Date record was created		
From date: 19/09/2022 To date: 26/09/2022		
Export locked study data to csv		
Export data item key		
Terms Dienlaimer Contrie nolicy Privacy nolice	Report Buo Feedback @ Net	Solving 2022

To open the file, locate the zip file in your downloads. Right click the file and go to 7-zip> Extract Files.

Name	File ownership	Dat	te modified	Туре	Size			
Today (2)								
ExportLocked_NAD_2021-0	93-12-09-07	12/	/03/2021 09:07	Compressed (zipped	d)	3 KB		
NAD_ExportKey_Gen (5)	Open		/03/2021 09:07	Microsoft Excel Com	n	10 KB		
Yesterday (5)	Open in new window	-						
Earlier this week (7)	Extract All							
Last week (6)	7-Zip	>	Open archive					
	CRC SHA	>	Open archive				>	
Last month (22)	Scan with Microsoft Defender		Extract files					
	🖻 Share		Extract Here					
	Open with		Extract to "Expor	tLocked_NAD_2021-03-12	-09-07\"			
	Give access to	>	Test archive					
	Restore previous versions		Add to archive					
	Send to		Compress and e	mail				
	Send to		Add to "ExportL	ocked_NAD_2021-03-12-0	9-07.7z"			
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	Сору		Compress to "Ex	portLocked_NAD_2021-03	-12-09-07	.zip" and email		
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You will then be asked to enter the password that you set earlier.

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E Pictures 🖈	🔨 NAD	_ExportKey_Gen (5)	Extract : C:\Users\Clementine.FBu	ince\Downloads\ExportLocked N	AD 2021-03-12-09-07	<	10 KB	
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Netsolving	> Earlier t	his week (7)	Extract to: C\Users\Clementine.FBunce\Downloa		~			
Creenshots	> Last we	ek (6)	Citusersiciementine. EBunce/Downloa	80S)	×			
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📥 OneDrive - Royal (	/ Last mo	mm (22)	Path mode:					
📑 Desktop			Full pathnames	×				
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Microsoft Teams								
Pictures			Overwrite mode:	Restore file se	curity			
			Ask before overwrite	~				
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Once you have entered your password, a new unzipped folder will appear in your downloads which will contain the exported data in an excel file.

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The figure below is an example of a successfully exported excel file with Part One data:

### Importing data

Only users assigned with importing permissions can import data. The exporter permission is also required so they can download the 'key' for the database. The administrator for your site has these permissions and can also add them to the

permissions for other users for your site. See the Netsolving Login and submitting data guidance for how to change permissions.

To import data, you will also need your site code, which is shown in brackets next to your hospital name on the Study Records page.

Please note: If you are planning to import your data we would recommend that this is allocated to only one person in your team, who has authority to review and approve the data. Multiple importers will create a risk of data loss or duplication.

Users can now see the 'Import' & 'Export' tabs at the top 1. Go to 'Export'

2. Click 'Export data item key'.

Below shows an example of the first part the opened export data item key in excel:

C	Sensitivity	: 📕 Gene	al 💉				Personal		Public	(	General	Cor	nfidential	Highly C	onfidential	
	Α	В	С	D	E	F	G	Н	1	J	К	L	М	N	0	Р
1	Field nam	Question	Max field	Minimum M	Maximum	Data type	Control ty	Item valu	Jes							
2	S01Section	nStatus				int	None	0 = Unsav	/ed; 5 = Disa	bled; 10 = (	Complete;	20 = Incor	mplete; 30	= Has Error	rs; 60 = Tran	sferred
3	S01NADA	1.1	50			varchar	Free text f	ield								
4	S0124Hrs	1.2				varchar	Radio But	Y = Yes; N	N = No;							
5	S0124HrsC	1.2.1	10			varchar	Free text f	ield								
6	S01Age	1.3		30	110	int	Free text f	ield								
7	S01Sex	1.4	2			varchar	Radio But	M = Male	e; F = Female	; NK = Unk	nown/Not	t documen	nted;			
8	S01Gende	1.5	2			varchar	Radio But	M = Male	; F = Female	; NB = Nor	-binary/O	ther; NK =	Unknown/	Not docur	mented;	
9	S01Ethnici	1.6	2			varchar	Radio But	AB = Asia	n or Asian E	ritish (Incl	udes any A	Asian back	ground e.g	. Banglade	shi Chinese	Indian
10	S01FirstLa	1.7	3			varchar	Radio But	E = Englis	sh; W = Wels	h; OE = Ot	her Europe	ean langua	ige; A = An	Asian lan	guage; O = (	Other;
11	S01Admis	1.8		*****		datetime	Date									
12	S01Primay	1.9	5			varchar	Radio But	CAN = Ca	ncer; CAR =	Cardiac/Va	ascular/Ch	est pain; D	DEH = Dehy	dration/N	utrition; DE	L = Deli
13	S01Primay	1.9.a	200			varchar	Free text f	ield								
14	S01Admis	1.1	3			varchar	Radio But	EM = Em	ergency; EL :	Elective;						
15	S01Deliriu	1.11	1			varchar	Radio But	Y = Yes; N	N = No;							
16	S01Demer	1.12	3			varchar	Radio But	KD = Kno	wn dement	ia; CaC = &	#x22;Prob	able"	; dementia	/Concern	s about cogr	nition;
17	S01Demer	1.12.1	5			varchar	Radio But	ALZ = Alz	heimer's Di	sease (F00	G30); ALZA	A = Demen	tia in Alzhe	eimer's dis	ease atypic	al or m
8	S01PlaceC	1.13	5			varchar	Radio But	OH = Ow	n home; RES	PC = Respi	te care; R	N = Rehab	ilitation wa	ard; PW = I	Psychiatric v	ward; C
9	S01Ward	1.14	5			varchar	Radio But	COE = Ca	re of the eld	lerly; C = C	ardiac; CC	= Critical c	are; GM = 0	General m	edical; N = N	Vephro
	S01WardS	1 14 i	100			varchar	Free text f	ield								

#### What the data item key is for

The data item key shows all of the codes that CaseCapture assigns to submitted data.

To successfully import your data you will need to have input the data in the spreadsheet you are going to import, in the same format as shown in the data

key. For example, for the question 1.9 asking about primary diagnosis or reason given for admission, the Item Values column shows the abbreviated codes and their values (CAN = Cancer; CAR = Cardiac/ Vascular etc, as above)

You will need to code the answers for the data you want to import, in the same way as in the data key. A spreadsheet with the **field headings** you need is appended to this document. <u>Please see the accompanying file here.</u>

unknown-	ORG1 🗸												
Study Home	Study Records	Dashboard	Reports	FAQs	Export	Import	Email Users	Users	Import Users	Email Log			
Import Metho	od: O Tes	st Import	0	Stop on	Error			🔵 Skip	Error Records		۲	Ignore Errors	
Existing reco		not import ck Complete R	ecords	Update	Records (	(Non empt	y values only)	Repl	ace Records (Ma	y cause data	loss)	Match by Import lo	dentifier
Please selec	t a CSV file with at	least the colur	nne :										
				Sender S	01Ethnici				D / 00/D /				
S01Dementi S02ScreenC	iaStatus, S01Place	OfCareBefore SLA, S02Scree	Admission, SenOther, S02	S01Ward,	S01Inclu	de, S01Ind	ludeCheck, S0	2NADAud	itNumber, S02Sc	reenSQiD, S	)2Screen(	sionType, S01Deliri CloseContact, S02S affCoordinateDischa	creen4AT,
S01Dementi S02ScreenC	iaStatus, Ś01Place CAM, S02ScreenOS ditNumber, S03Diso	OfCareBefore SLA, S02Scree	Admission, SenOther, S02	S01Ward,	S01Inclu	de, S01Ind	ludeCheck, S0	2NADAud	itNumber, S02Sc	reenSQiD, S	)2Screen(	CloseContact, S02S	creen4AT,
S01Dementi S02ScreenC S03NADAud and optionally S0124HrsCh S02Delirium S02PainAss S02PainAss	iaStatus, Ś01Place CAM, S02ScreenO3 ditNumber, S03Disc ly : heck, S01PrimayDi ManagementPlan, sessmentToolCNPI, sessmentRepeated	OfCareBefore, SLA, S02Scree chargeStatus, s agnosisOther[ S02DeliriumC S02PainAsse , S02PainAsse	Admission, S enOther, S02 SiteCode Details, S01E arePlan, S02 ssmentTool0	201Ward, 2PainAsse 2PainAsse 2PainAsse 2uestion, eatedDate	S01Inclu essment, S Type, S01 essmentE S02Pain/ e, S02Pain/	de, S01Ind S02Discha WardSpec Date, S02F Assessmen nReasses	cludeČhečk, S03 argePlan, S02E; cify, S02Screen( ?ainAssessment ntToolNone, S03 smentToolAbbe;	2NADAud xpectedDa DtherDeta ToolAbbe 2PainAsse yPainScal	itNumber, S02Sc ateOfDischargeR uils, S02ScreenDa yPainScale, S02I assmentToolOthe e, S02PainReass	reenSQID, S( ecorded, S02 ate, S02Deliri PainAssessm r, S02PainAs sessmentTool	02Screen( NamedSta umEviden entTooIPA sessment PAINAID,	CloseContact, S02S affCoordinateDischa ce, S02DeliriumCor INAID,	rreen4AT, rge, firmed, nentToolCNPI,
S01Dementi S02ScreenC S03NADAud and optionally S0124HrsCh S02Delirium S02PainAss S02PainAss	iaStatus, Ś01Place CAM, S02ScreenO3 ditNumber, S03Disc ly : heck, S01PrimayDi ManagementPlan, essmentToolCNPI, issesmentToolQuu	OfCareBefore, SLA, S02Scree chargeStatus, s agnosisOther[ S02DeliriumC S02PainAsse , S02PainAsse	Admission, S enOther, S02 SiteCode Details, S01E arePlan, S02 ssmentTool0	201Ward, 2PainAsse 2PainAsse 2PainAsse 2uestion, eatedDate	S01Inclu essment, S Type, S01 essmentE S02Pain/ e, S02Pain/	de, S01Ind S02Discha WardSpec Date, S02F Assessmen nReasses	cludeČhečk, S03 argePlan, S02E; cify, S02Screen( ?ainAssessment ntToolNone, S03 smentToolAbbe;	2NADAud xpectedDa DtherDeta ToolAbbe 2PainAsse yPainScal	itNumber, S02Sc ateOfDischargeR uils, S02ScreenDa yPainScale, S02I assmentToolOthe e, S02PainReass	reenSQID, S( ecorded, S02 ate, S02Deliri PainAssessm r, S02PainAs sessmentTool	02Screen( NamedSta umEviden entTooIPA sessment PAINAID,	CloseContact, S02S affCoordinateDischa ce, S02DeliriumCor INAID, FoolOtherSpecify, S02PainReassessn	rreen4AT, rge, firmed, nentToolCNPI,

In Column A "Site Code" you will add your site code. It is important to make sure you include the site code for each case, otherwise the file will not import.

In Column B "Import Identifier" you may include an import identifier, see below

- An **import identifier** is unique to each record, and creating one is useful for matching records.
- Matching your imports by 'import identifier' allows you to update existing records on the system.
- This means you could have one large excel file containing all the records you have imported. You can amend or add to this as needed, for example with additional information, and then re-import. This will update the existing imported file with the new information.
- Here is an example format for an import identifier Sept22CHNAD89 (month and year, your initials and the allocated record number for audit).
- Remember that each import identifier is unique, so ensure that there are no duplicates
- You can set Import Identifier to Ignore, if you do not wish to include it

- To fill in the rest of the fields, you will need to use the 'Data item key' file you downloaded earlier to match the values in the database.
- (E.g., S01Gender you will need to enter 'M' or 'F' for male or female and for S01Ethnicity White British would be recorded as WB).

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C6	• : ×	$\checkmark f_x$													
	A	В	С	D	E	F	G	н	I.	J	к	L	М	N	
1	ImportIdentifier	SiteCode	S0124Hrs	S01Age	S01Gende	S01Ethnici	S01FirstLa	S01Admissio	S01Primay	S01Prima	S01Admis	S01Deleriu	S01Demer	S01Demer	S01
2	MAY21CFBNS01_1	NS01	1	94	М	AB	E	19/05/2021	CAN		EM	Y	KD	ALZ	ОН
3															
4															
5															
4															

Once the file has been finished, save it as a CSV Comma delimited file. It is important that it is saved in this format or you will not be able to import the file into Netsolving.

On the **import page** of Netsolving, select 'Choose file' and select your CSV file. The box shown below allows you to choose your import method. It also allows you to decide what you want to do with existing records if there are any in your file that match the database, <u>as explained above</u>.

When you come to import, you can select the options; 'Stop on error', 'Update records' and 'Match by import id', this will import any new records and update any old ones.

**Please note**: if you wish to import incomplete data, e.g. up to the end of part one, or with a field missing. You will need to select the option "Ignore Errors" (which will show a warning). Selecting "Stop on Errors" will cause incomplete records to fail to upload.

(If you select 'Test Import' you will not import any data.)

#### Click import.

NB do not click on import again, until you have checked your study records to see if this has been successful. You risk importing twice.

C	0 - Net Solv	ing UAT Site <sub>~</sub>									
	his is the UAT (				not ente	r any data	a related to live studies.				
	ne live CaseCa	oture Site is da	ta.casecapture	.com							
3	Study Records	Dashboard	QI (PDSA)	Export	Import	Users					
(	Import Method	. 01	est Import	(	Stop	on Error		Skip Error Re	cords	Ignore Errors	
	Existing record	~	Do not import				ds (Supplied values only)	<u> </u>	ords (May cause data loss)		
		<u> </u>	ock Complete	Records							
	Please select a										
									, S01AdmissionType, S01I S02ScreenCAM, S02ScreenCAM		ntiaStatus, S01DementiaType, nOther,
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	and optionally :										
	RecordStatus, S01SectionSta S03PainAsses	Caseld, Impor atus, S01Prima smentToolAbb smentToolOthe	yDiagnosisOth eyPainScale, S erSpecify, S03	erDetails, S 303PainAss	01WardS essment1	pecify, S oolPAIN	02SectionStatus, S02Scr AID, S03PainAssessment	eenOtherDetails, S0 ToolCNPI, S03Pain	serName, Locked, Locked[ )2ScreenDate, S03Section AssessmentToolNone, S03 , S04DischargePlanNot24	Status, S03PainAss PainAssessmentToo	essmentDate, blOther,
-	Stradditional	commonte NK									

If an orange pop up box appears, you need to change the field names, by selecting the drop-down boxes, as show below.



Any orange boxes that appear in the data fields, as shown below indicate missing or incorrect fields and can be completed using the export data item key (or by editing the records in Study records).

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	S04Discharger S04AdditionalC				cnar	irge	erna	ariin	ULZ4	HI	5, 3	50	4Dischargeman	esum
	Closed, S01Se	ctions	Statu	us, s	S01	1Pr	ima	ayD	iagn	IOS	isO	the	CreatedUserNa erDetails, S01W eatedDate, S04S	ardSp
	S04AdditionalC	omm				a		.550	5511	ICI	urve	she	saleuDale, 3040	Sectio
	Choose File		1021	11	rt	t Te	est f	file.	csv					
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~	S01Ward										•		S01Outlying	
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	RW											N		
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If there are any errors in the files, they will be explained. Usually it's because a required field has not been completed, as shown below. Incomplete records <u>can</u> be imported, but will not be accepted as part of your data until finally complete.

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S02DelenumCarePlan, S04EOLPlan, S04Addit		ated, S04DischargePlan, S04DischargePlanNot2	4Hrs, S04DischargePlanEstimateDate, S04DischargeStatus, S04CareLocationAtterDischarge,
and optionally :			
Caseld, ImportId, Impor S01PrimayDiagnosisOt		S02ScreenOtherDetails, S02ScreenDate, S03Sec	LockedDateTime, LockedUserName, RecordStatus, Closed, S01SectionStatus, tionStatus, S03PainAssessmentDate, S03PainAssessmentRepeatedDate, S04SectionStatus,
Import CSV File:			
Choose File 202102	211rt Test file.csv		
Ignore first/header row:			
-	-		
rDischarge 🗸 🗸	S04EOLPlan ~	S04AdditionalComments	i i
-			Q2.2 : 'Please enter the date of the first assessment
			identified above' is required
	×	0	Q3.1.a : 'Enter the date of the pain assessment' is required Q3.2.a : 'Enter the date of the repeated pain assessment' is
			required
			Q4.1.a : 'Date discharge plan initiated' is required
			Q4.5 : 'Date of discharge' is required
			Q1.1 : The patient must be in hospital at for at least 24
			hours before they are eligible Q2.2 : 'Please enter the date of the first assessment
			identified above' is required
	**	*	
Import			

Once a file has been successfully imported, you will see it under the 'Study Records' tab. It will have a new Case ID number, and the email address of the creator will be shown:

tudy Home	Study Records	Dashboard	Reports	FAQs	Export	Import	Email Users	Users	Import Users	Email Log			
ationa	al Audit of	Demen	tia 20	22									
dd record	Show search												
ID	Owner			Ag	le	Gender	Gend	ər	Admission Da	ate			Record Status
1464	shahroz.azhar@	propsych.ac.uk		10	6	Female	Fema	e	20/09/2022 00	:00:00	and the second se	Û	Incomplete
1463	shahroz.azhar@	prcpsych.ac.uk		10	5	Male	Male		21/09/2022 00	:00:00	Canto	Ŵ	Incomplete
1122	chloe.hood@rcp	sych.ac.uk		75		Female	Fema	e	20/09/2022 00	:00:00	Canto	Ŵ	Incomplete
1162	chloe.hood@rcp	sych.ac.uk		75		Female	Fema	e	20/09/2022 00	:00:00	<b>CONT</b>	Ŵ	Incomplete
1161	chloe.hood@rcp	sych.ac.uk		69		Male	Male		21/09/2022 00	:00:00	Canto	Ŵ	Incomplete
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1152	chloe.hood@rcp	sych.ac.uk		75		Female	Fema	e	20/09/2022 00	:00:00	e de la companya de la	Ŵ	Incomplete
1124	chloe.hood@rcp	sych.ac.uk		75		Female	Fema	e	20/09/2022 00	:00:00	e de la constante de la consta	Ŵ	Archive Delete
1123	chloe.hood@rcp	sych.ac.uk		69		Male	Male		21/09/2022 00	:00:00	e de la constante de la consta	面	Archive Delete
1121	chloe.hood@rcp	sych.ac.uk		69		Male	Male		21/09/2022 00	:00:00	<b>AND</b>	Ŵ	Archive Delete
	1 2 🕨	Page size:	10 🔻										19 items in 2 p