

Extendable Audit Round 6
Exporting your data on CaseCapture by
Netsolving
Plus importing data in bulk
Guidance 2023

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Exporting data

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

The screenshot shows a web application interface. At the top left, there is a user profile dropdown menu labeled 'unknown-ORG1'. Below it is a navigation menu with tabs: 'Study Home', 'Study Records', 'Dashboard', 'Reports', 'FAQs', 'Export', 'Import', 'Email Users', 'Users', 'Import Users', and 'Email Log'. The 'Export' tab is highlighted with a red circle. Below the navigation menu, there are logos for 'RC PSYCH ROYAL COLLEGE OF PSYCHIATRISTS' and 'NAD NATIONAL AUDIT OF DEMENTIA'. The main heading is 'National Audit of Dementia' followed by 'Audit of Casenotes 2022'. Below this, there is a thank you message and a paragraph of text: 'Thank you for participating in the National Audit of Dementia. For this audit you will be submitting casenote audit data via the new platform CaseCapture on Netsolving. The NAD team have created a comprehensive guidance document which you should have received via email outlining how to find your sample, navigate the data collection tool and submit data for the pilot. If you have not received this or have any queries please nad@rcpsych.ac.uk'. At the bottom, there is a footer with links for 'Terms', 'Disclaimer', 'Cookie policy', 'Privacy notice', 'Report Bug', 'Feedback', and '© Net Solving 2022'.

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':

The screenshot shows a section titled 'Exporting information.' with two blue buttons: 'Export locked study data to csv' and 'Export data item key'. Below the buttons, the text reads: 'Exports are password protected to help ensure the security of the data. it is required that you enter a password of at least 8 characters. This does not mean the data is secure however and the passworded file should not be placed on public machines or passed to insecure parties. Passworded zip files are not always handled well by operating systems, to open them you will most likely need to use a tool such as 7-Zip on a windows machine or Unarchiver/iZip on a MAC. **It remains your responsibility to find and assess appropriate software we cannot take responsibility for 3rd party software or security.**'

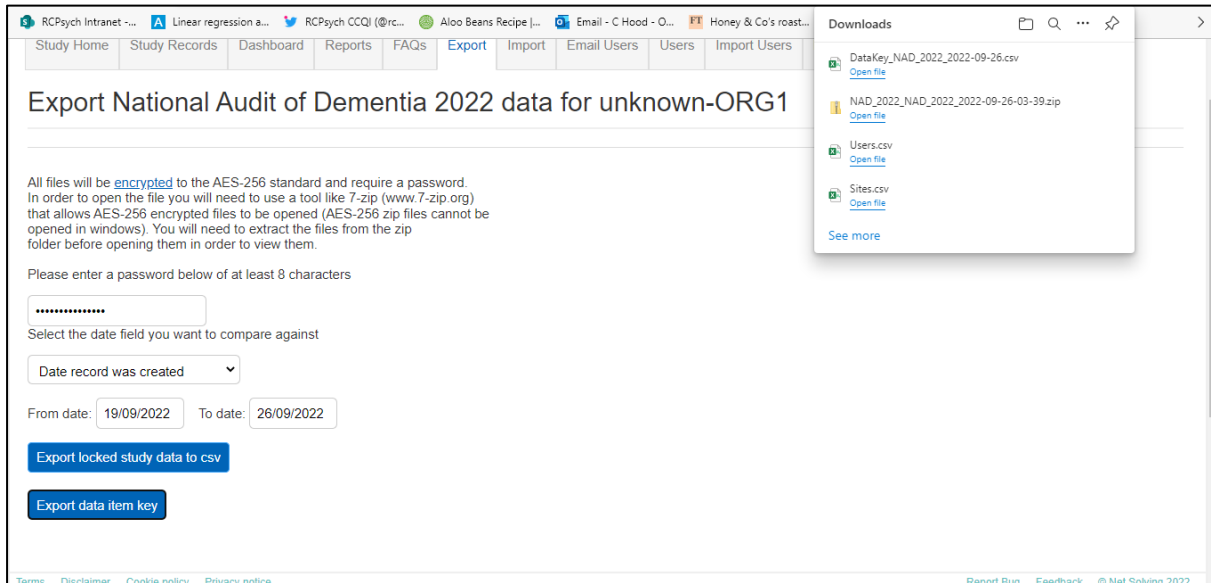
Define the data that you want to export using the 'Select the date field you want to compare against' drop down list (Date record was created, Date record was locked or Date of admission). You will then need to set the data parameters for

the data that you want to export. The example below would export all records created from 19th September to 26th September 2022.

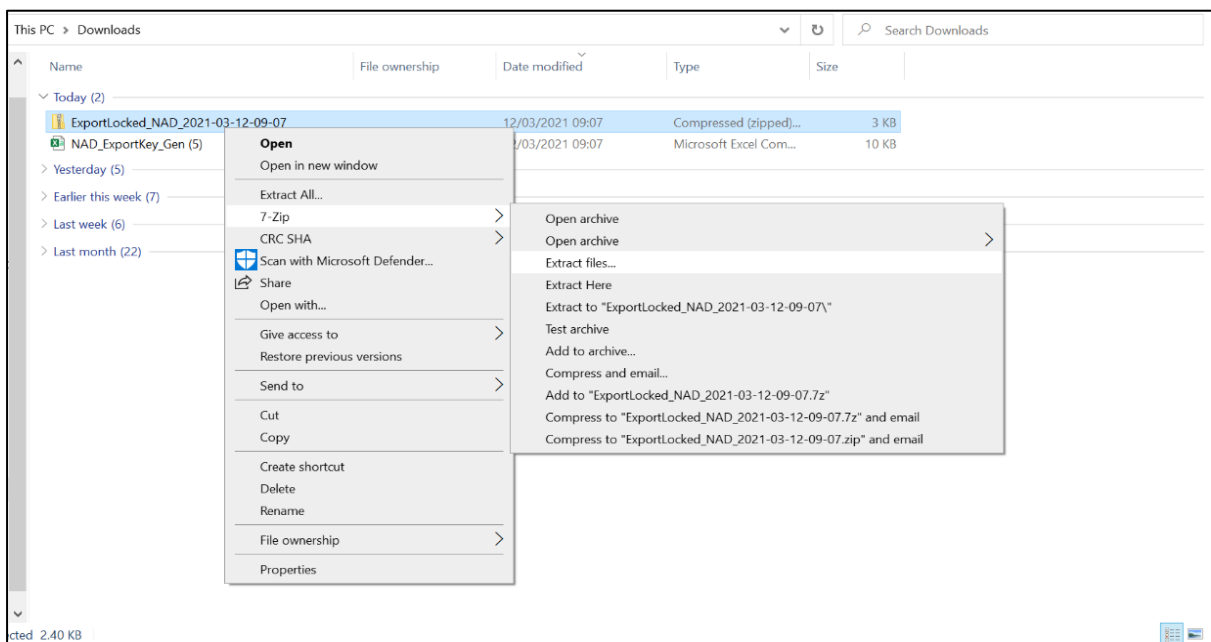
Please note you can only export locked entries.

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

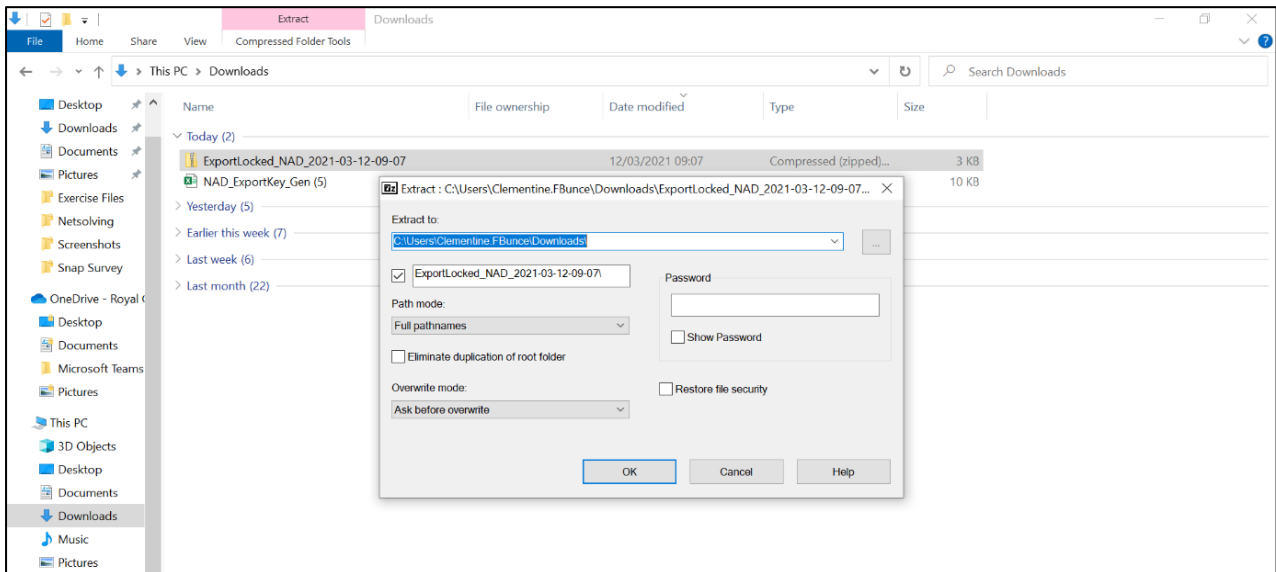
The downloaded files should appear in your downloads, or at the bottom of the screen.



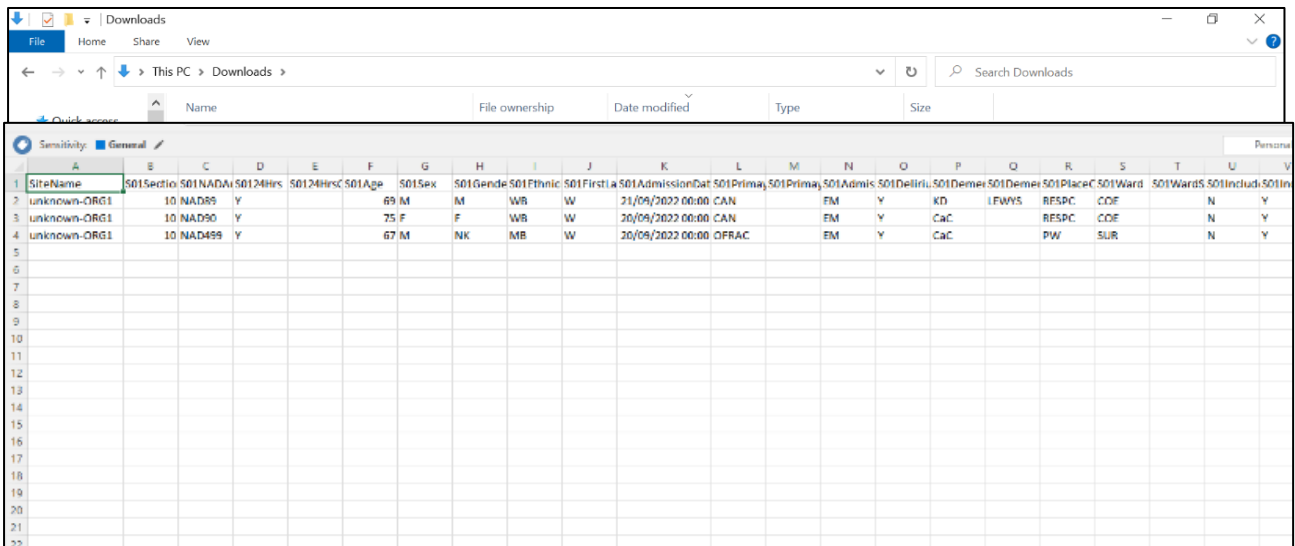
To open the file, locate the zip file in your downloads. Right click the file and go to 7-zip> Extract Files.



You will then be asked to enter the password that you [set earlier](#).



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.



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:

Field name	Question	Max field	Minimum	Maximum	Data type	Control type	Item values
S01SectionStatus					int	None	0 = Unsaved; 5 = Disabled; 10 = Complete; 20 = Incomplete; 30 = Has Errors; 60 = Transferred In
S01NADA		1.1	50		varchar	Free text field	
S0124Hrs		1.2			varchar	Radio But	Y = Yes; N = No;
S0124HrsC1.2.1			10		varchar	Free text field	
S01Age		1.3		30	110	int	Free text field
S01Sex		1.4	2		varchar	Radio But	M = Male; F = Female; NK = Unknown/Not documented;
S01Gende		1.5	2		varchar	Radio But	M = Male; F = Female; NB = Non-binary/Other; NK = Unknown/Not documented;
S01Ethnic		1.6	2		varchar	Radio But	AB = Asian or Asian British (Includes any Asian background e.g. Bangladeshi Chinese Indian Pa
S01FirstLa		1.7	3		varchar	Radio But	E = English; W = Welsh; OE = Other European language; A = Any Asian language; O = Other; NK
S01Admis		1.8		#####	datetime	Date	
S01Primay		1.9	5		varchar	Radio But	CAN = Cancer; CAR = Cardiac/Vascular/Chest pain; DEH = Dehydration/Nutrition; DEL = Deliriu
S01Primay1.9.a			200		varchar	Free text field	
S01Admis		1.1	3		varchar	Radio But	EM = Emergency; EL = Elective;
S01Deliriu		1.11	1		varchar	Radio But	Y = Yes; N = No;
S01Demer		1.12	3		varchar	Radio But	KD = Known dementia; CaC = Probable dementia/Concerns about cognition;
S01Demer1.12.1			5		varchar	Radio But	ALZ = Alzheimer's Disease (F00 G30); ALZA = Dementia in Alzheimer's disease atypical or mixe
S01PlaceC		1.13	5		varchar	Radio But	OH = Own home; RESPC = Respite care; RW = Rehabilitation ward; PW = Psychiatric ward; CH =
S01Ward		1.14	5		varchar	Radio But	COE = Care of the elderly; C = Cardiac; CC = Critical care; GM = General medical; N = Nephrolog
S01WardS1.14.i			100		varchar	Free text field	

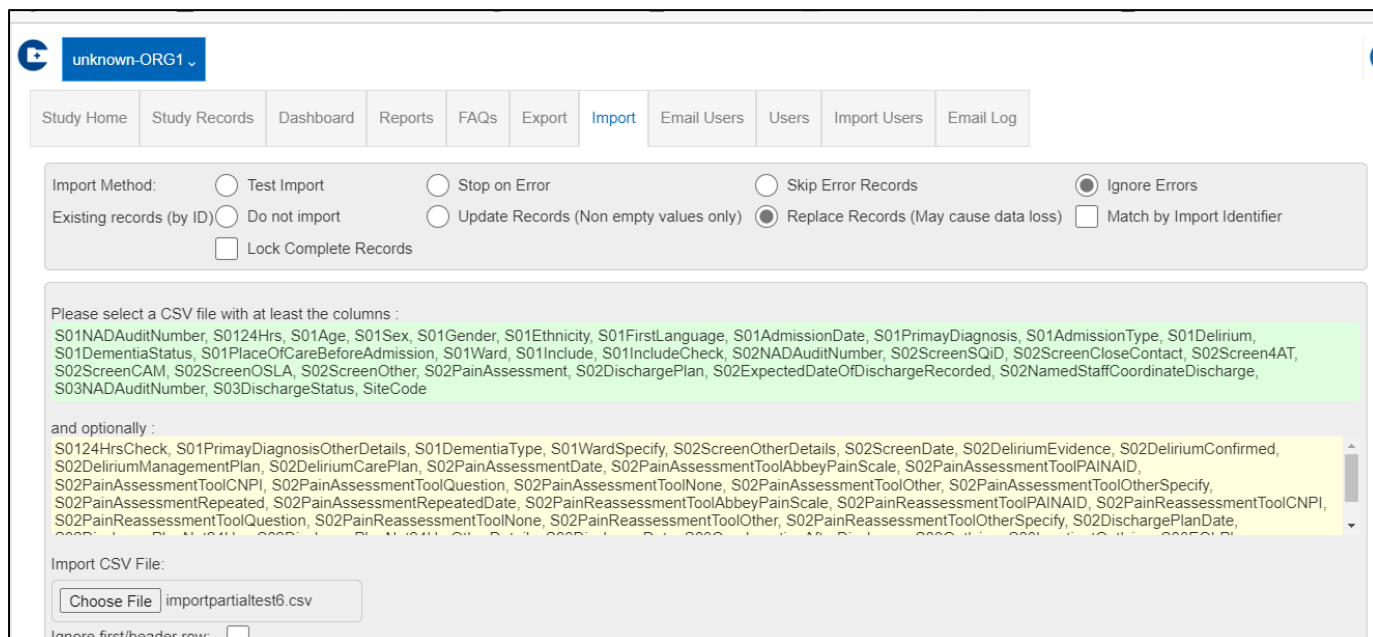
What the data item key is for

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. [Please see the accompanying file here.](#)



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).

1	ImportIdentifier	SiteCode	S0124Hrs	S01Age	S01Gende	S01Ethnici	S01FirstLa	S01Admissio	S01Primay	S01Primay	S01Admis	S01Deleriu	S01Demer	S01Demer	S01I
2	MAY21CFBNS01_1	NS01	1	94 M	AB	E	19/05/2021	CAN			EM	Y	KD	ALZ	OH
3															
4															
5															

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, [as explained above](#).

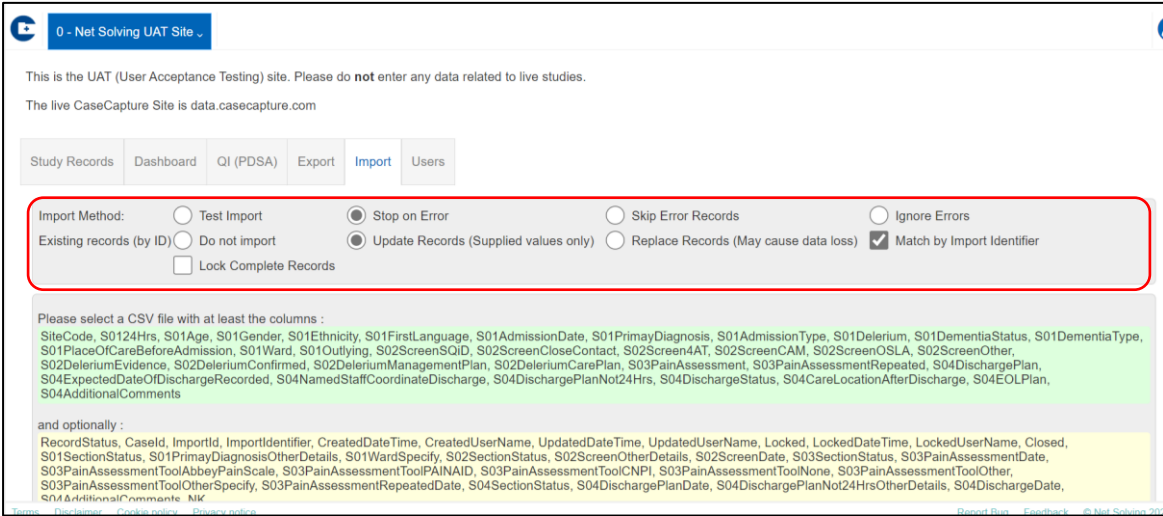
When you come to import, you can select the options; 'Stop on error', 'Update records' and 'Match by import id', this will import any new records and update any old ones.

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.

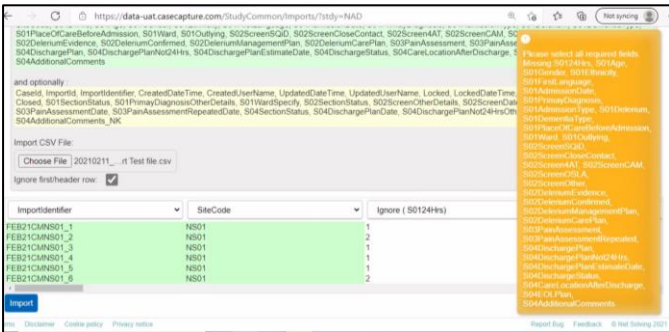
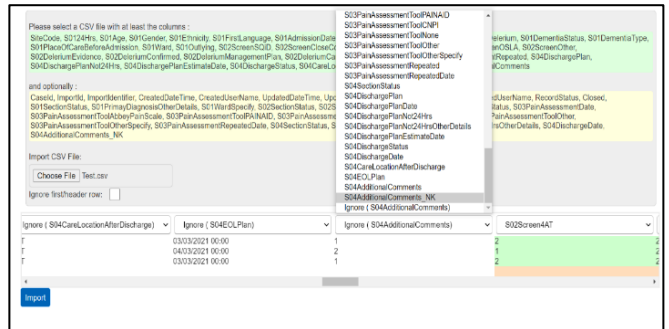
(If you select 'Test Import' you will not import any data.)

Click import.

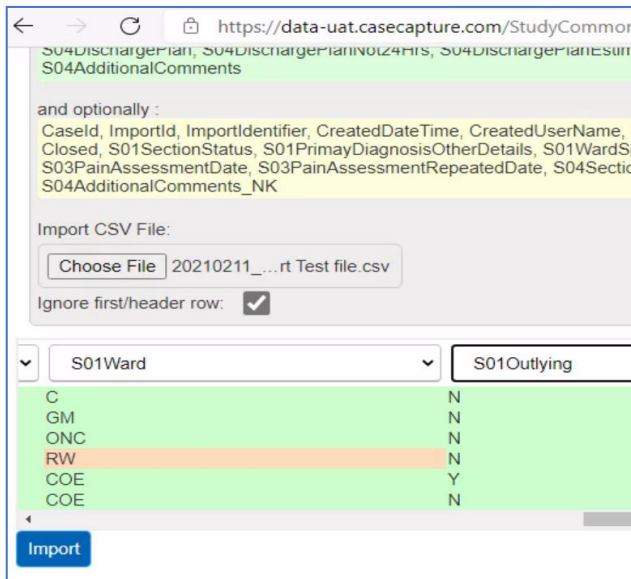
NB do not click on import again, until you have checked your study records to see if this has been successful. You risk importing twice.



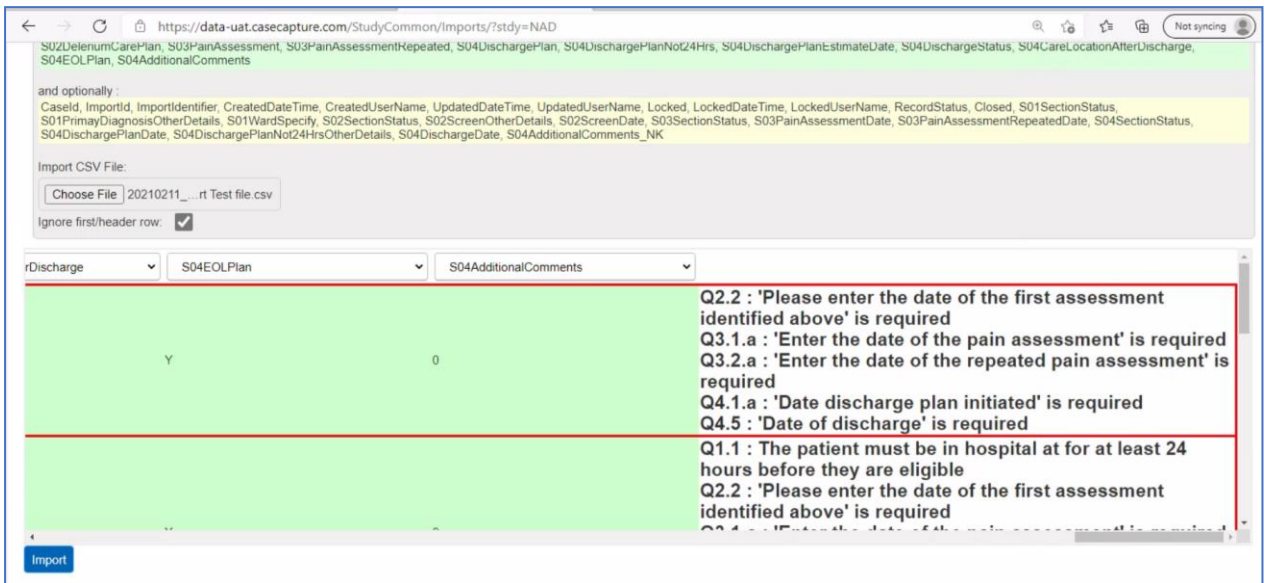
If an orange pop up box appears, you need to change the field names, by selecting the drop-down boxes, as show below.



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).



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 can be imported, but will not be accepted as part of your data until finally complete.



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:

National Audit of Dementia 2022

Add record Show search

ID	Owner	Age	Gender	Gender	Admission Date			Record Status
1464	shahroz.azhar@rcpsych.ac.uk	106	Female	Female	20/09/2022 00:00:00			Incomplete
1463	shahroz.azhar@rcpsych.ac.uk	105	Male	Male	21/09/2022 00:00:00			Incomplete
1122	chloe.hood@rcpsych.ac.uk	75	Female	Female	20/09/2022 00:00:00			Incomplete
1162	chloe.hood@rcpsych.ac.uk	75	Female	Female	20/09/2022 00:00:00			Incomplete
1161	chloe.hood@rcpsych.ac.uk	69	Male	Male	21/09/2022 00:00:00			Incomplete
1151	chloe.hood@rcpsych.ac.uk	69	Male	Male	21/09/2022 00:00:00			Incomplete
1152	chloe.hood@rcpsych.ac.uk	75	Female	Female	20/09/2022 00:00:00			Incomplete
1124	chloe.hood@rcpsych.ac.uk	75	Female	Female	20/09/2022 00:00:00			Archive Delete
1123	chloe.hood@rcpsych.ac.uk	69	Male	Male	21/09/2022 00:00:00			Archive Delete
1121	chloe.hood@rcpsych.ac.uk	69	Male	Male	21/09/2022 00:00:00			Archive Delete