

# **Extendable Audit Round 5**

## **Exporting your data on CaseCapture by Netsolving**

## **Plus importing data in bulk**

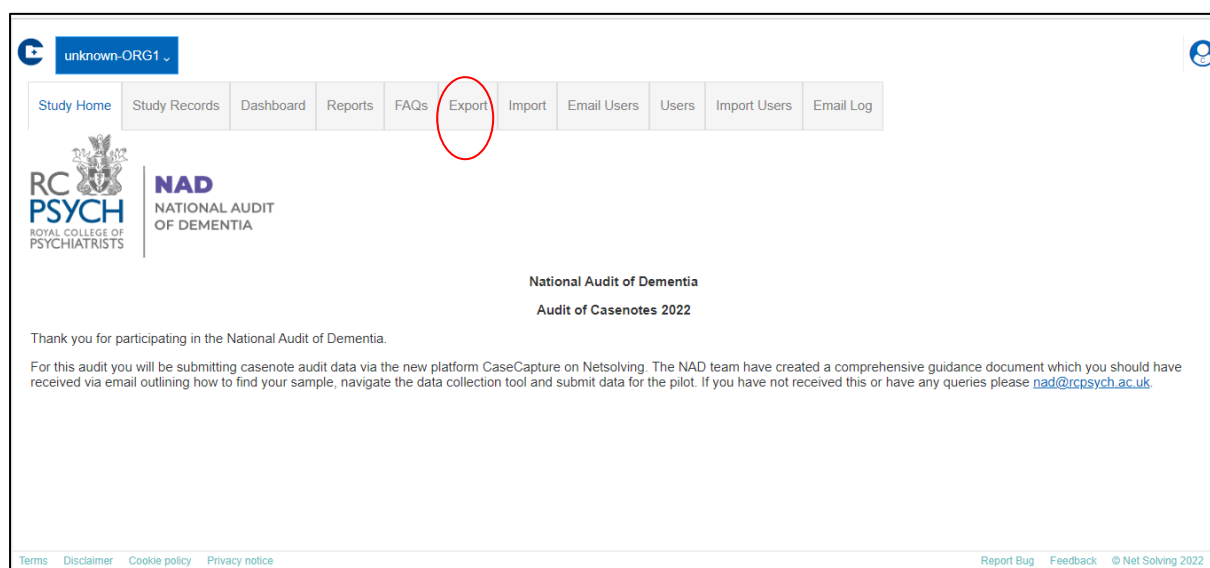
## **Guidance 2022**

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## Exporting data

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

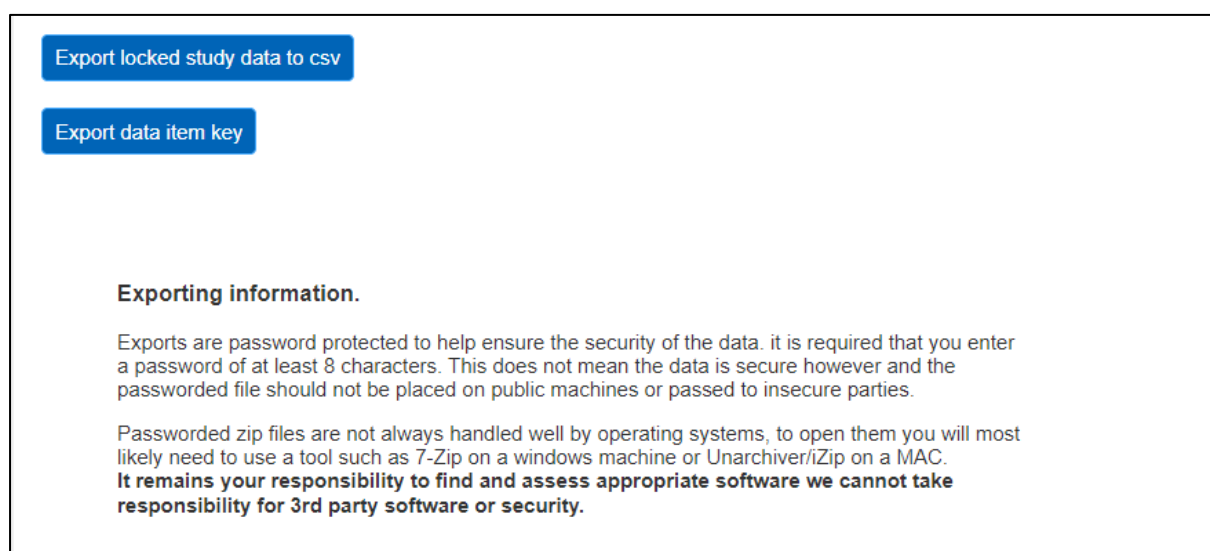


When you select the export tab you will be directed to the export data page.

**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':



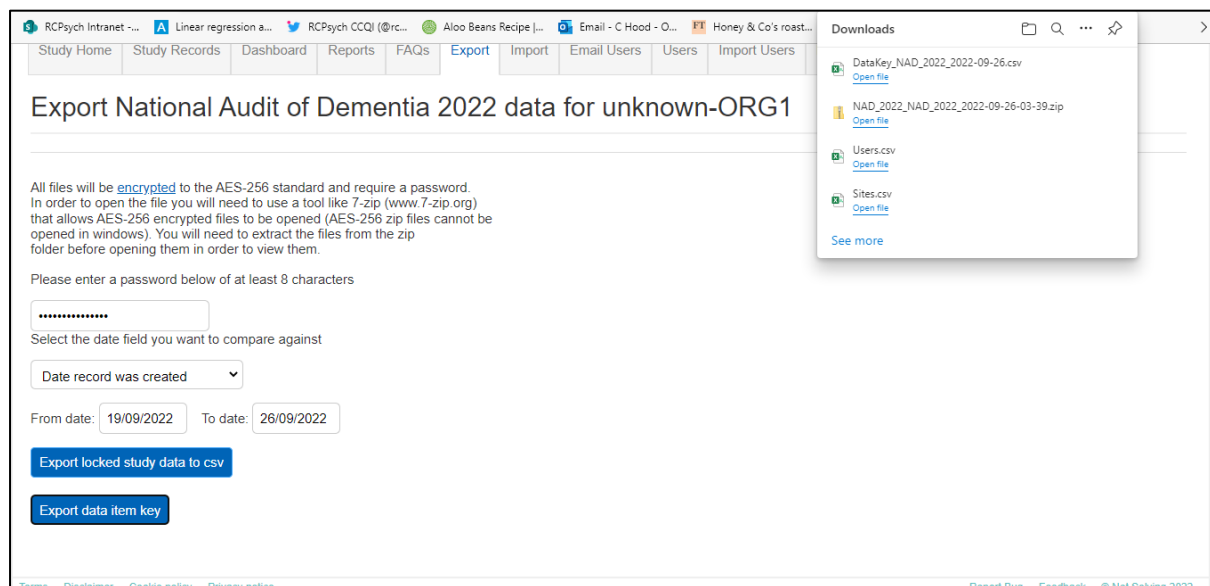
Define the data that you want to export using the 'Select the date field you want to compare against' drop down list (Date record was created, Date record was locked or Date of admission). You will then need to set the data parameters for

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.

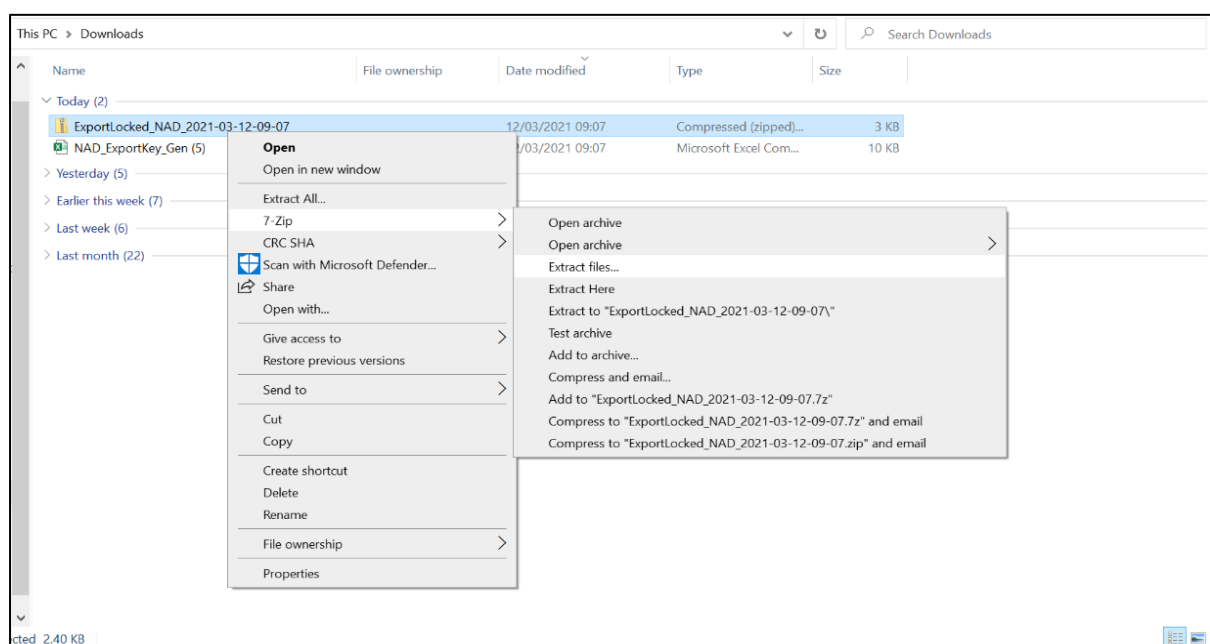
**Please note** you can only export locked entries.

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

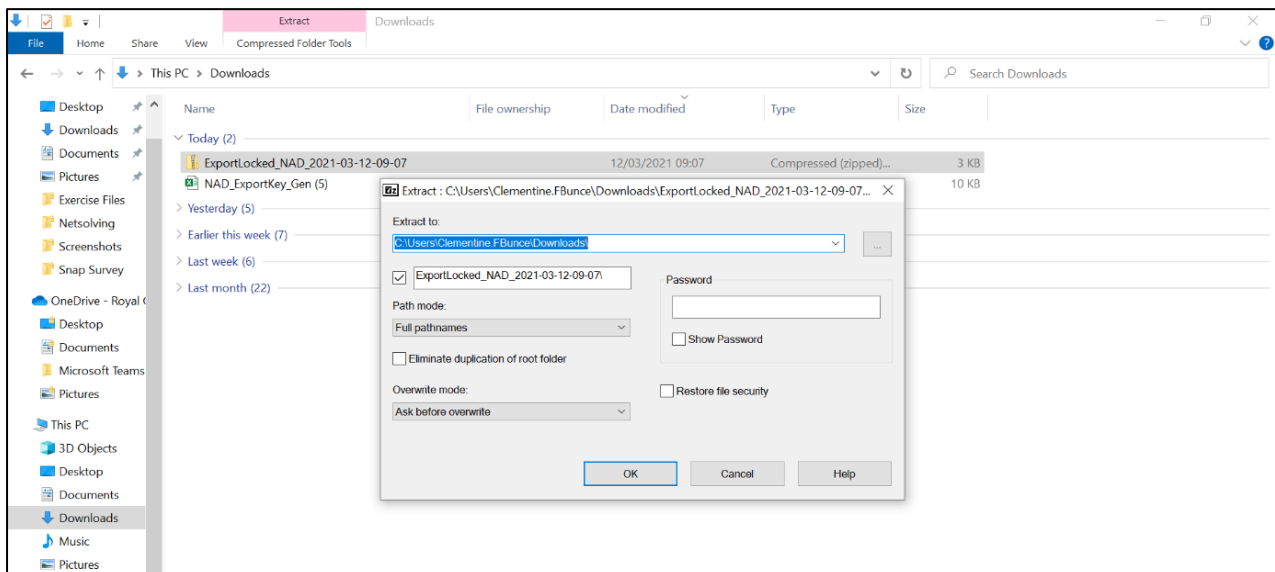
The downloaded files should appear in your downloads, or at the bottom of the screen.



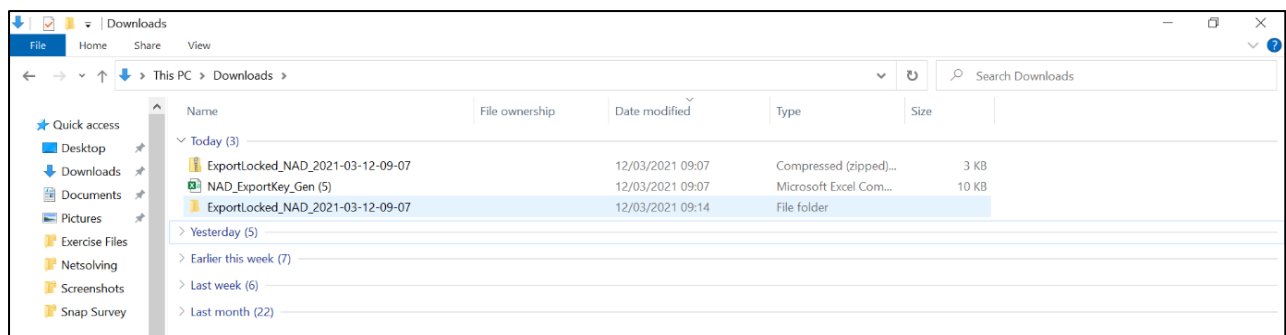
To open the file, locate the zip file in your downloads. Right click the file and go to 7-zip> Extract Files.



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:

Sensitivity: 

General

Personal

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1	SiteName	S01Section	S01NADA	S0124Hrs	S0124HrsC	S01Age	S01Sex	S01Gende	S01Ethnic	S01Firsta	S01AdmissionDat	S01Primay	S01Primay	S01Admic	S01Deliri	S01Demei	S01Demei	S01PlaceC	S01Ward	S01WardS	S01Includi	S01In
2	unknown-ORG1	10	NAD89	Y		69 M	M	WB	W	21/09/2022 00:00	CAN	EM	Y	KD	IFWYS	RESPC	COF		N	Y		
3	unknown-ORG1	10	NAD90	Y		75 F	F	WB	W	26/09/2022 00:00	CAN		EM	Y	CaC		RESPC	COF		N	Y	
4	unknown-ORG1	10	NAD499	Y		67 M	NK	MB	W	26/09/2022 00:00	CFRAC		EM	Y	CaC		PW	SUR		N	Y	
5																						
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H8

## 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.](#)

[illegible]

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).

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	ImportIdentifier	SiteCode	S0124Hrs	S01Age	S01Gende	S01Ethnici	S01FirstLa	S01Admissio	S01Primay	S01Primay	S01Admis:	S01Deleriu	S01Demer	S01Demer
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.**

**0 - Net Solving UAT Site**

This is the UAT (User Acceptance Testing) site. Please do **not** enter any data related to live studies.

The live CaseCapture Site is data.casecapture.com

Study Records | Dashboard | QI (PDSA) | Export | **Import** | Users

Import Method: ☐ Test Import ☒ Stop on Error ☐ Skip Error Records ☐ Ignore Errors

Existing records (by ID) ☐ Do not import ☒ Update Records (Supplied values only) ☐ Replace Records (May cause data loss) ☒ Match by Import Identifier

☐ Lock Complete Records

Please select a CSV file with at least the columns :

SiteCode, S0124Hrs, S01Age, S01Gender, S01Ethnicity, S01FirstLanguage, S01AdmissionDate, S01PrimaryDiagnosis, S01AdmissionType, S01Delerium, S01DementiaStatus, S01DementiaType, S01PlaceOfCareBeforeAdmission, S01Ward, S01Outlying, S02ScreenSQID, S02ScreenCloseContact, S02Screen4AT, S02ScreenCAM, S02ScreenOSLA, S02ScreenOther, S02DeleriumEvidence, S02DeleriumConfirmed, S02DeleriumManagementPlan, S02DeleriumCarePlan, S03PainAssessment, S03PainAssessmentRepeated, S04DischargePlan, S04ExpectedDateOfDischargeRecorded, S04NamedStaffCoordinateDischarge, S04DischargePlanNot24Hrs, S04DischargeStatus, S04CareLocationAfterDischarge, S04EOLPlan, S04AdditionalComments

and optionally :

RecordStatus, Caseld, ImportId, ImportIdentifier, CreatedDateTime, CreatedUserName, UpdatedDateTime, UpdatedUserName, Locked, LockedDateTime, LockedUserName, Closed, S01SectionStatus, S01PrimaryDiagnosisOtherDetails, S01WardSpecify, S02SectionStatus, S02ScreenOtherDetails, S02ScreenDate, S03SectionStatus, S03PainAssessmentDate, S03PainAssessmentToolAbbyPainScale, S03PainAssessmentToolPAINAID, S03PainAssessmentToolCNPI, S03PainAssessmentToolNone, S03PainAssessmentToolOther, S03PainAssessmentToolOtherSpecify, S03PainAssessmentRepeatedDate, S04SectionStatus, S04DischargePlanDate, S04DischargePlanNot24HrsOtherDetails, S04DischargeDate, S04AdditionalComments\_NK

Home | Dashboard | **Tools and setup** | [Data capture online](#) | [Report Bug](#) | [Feedback](#) | [Net Solving 2023](#)

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

https://data-uat.casecapture.com/Study/Common/Imports/?study=NAD

Please select a CSV file with at least the columns :

SiteCode, S0124Hrs, S01Age, S01Gender, S01Ethnicity, S01FirstLanguage, S01AdmissionDate, S01PrimaryDiagnosis, S01AdmissionType, S01Delerium, S01DementiaStatus, S01DementiaType, S01PlaceOfCareBeforeAdmission, S01Ward, S01Outlying, S02ScreenSQID, S02ScreenCloseContact, S02Screen4AT, S02ScreenCAM, S02ScreenOSLA, S02ScreenOther, S02DeleriumEvidence, S02DeleriumConfirmed, S02DeleriumManagementPlan, S02DeleriumCarePlan, S03PainAssessment, S03PainAssessmentRepeated, S04DischargePlan, S04ExpectedDateOfDischargeRecorded, S04NamedStaffCoordinateDischarge, S04DischargePlanNot24Hrs, S04DischargeStatus, S04CareLocationAfterDischarge, S04EOLPlan, S04AdditionalComments

and optionally :

Caseld, ImportId, ImportIdentifier, CreatedDateTime, CreatedUserName, UpdatedDateTime, UpdatedUserName, Locked, LockedDateTime, LockedUserName, Closed, S01SectionStatus, S01PrimaryDiagnosisOtherDetails, S01WardSpecify, S02SectionStatus, S02ScreenOtherDetails, S02ScreenDate, S03SectionStatus, S03PainAssessmentDate, S03PainAssessmentToolAbbyPainScale, S03PainAssessmentToolPAINAID, S03PainAssessmentToolCNPI, S03PainAssessmentToolNone, S03PainAssessmentToolOther, S03PainAssessmentToolOtherSpecify, S03PainAssessmentRepeatedDate, S04SectionStatus, S04DischargePlanDate, S04DischargePlanNot24HrsOtherDetails, S04DischargeDate, S04AdditionalComments\_NK

Import CSV File:

Choose File | Test file.csv

Ignore first header row: ☒

Import Identifier:  SiteCode:  Ignore (S0124Hrs)

Import

Ignore (S04CareLocationAfterDischarge) | Ignore (S04EOLPlan) | Ignore (S04AdditionalComments) | S02Screen4AT

Import

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).



← → ↻ 🔒 https://data-uat.cascapture.com/StudyCommon

S04DischargePlan, S04DischargePlanNot24Hrs, S04DischargePlanEstimateDate, S04DischargeStatus, S04CareLocationAfterDischarge, S04EOLPlan, S04AdditionalComments

and optionally :

Caseld, ImportId, ImportIdentifier, CreatedDateTime, CreatedUserName, UpdatedDateTime, UpdatedUserName, Locked, LockedDateTime, LockedUserName, RecordStatus, Closed, S01SectionStatus, S01PrimaryDiagnosisOtherDetails, S01WardSpecify, S02ScreenOtherDetails, S02ScreenDate, S03SectionStatus, S03PainAssessmentDate, S03PainAssessmentRepeatedDate, S04SectionStatus, S04DischargePlanDate, S04DischargePlanNot24HrsOtherDetails, S04DischargeDate, S04AdditionalComments\_NK

Import CSV File:

Choose File 20210211\_...rt Test file.csv

Ignore first/header row: ☒

S01Ward	S01Outlying
C	N
GM	N
ONC	N
RW	N
COE	Y
COE	N

Import

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.

← → ↻ 🔒 https://data-uat.cascapture.com/StudyCommon/imports/?study=NAD

S02DeteriumCarePlan, S03PainAssessment, S03PainAssessmentRepeated, S04DischargePlan, S04DischargePlanNot24Hrs, S04DischargePlanEstimateDate, S04DischargeStatus, S04CareLocationAfterDischarge, S04EOLPlan, S04AdditionalComments

and optionally :

Caseld, ImportId, ImportIdentifier, CreatedDateTime, CreatedUserName, UpdatedDateTime, UpdatedUserName, Locked, LockedDateTime, LockedUserName, RecordStatus, Closed, S01SectionStatus, S01PrimaryDiagnosisOtherDetails, S01WardSpecify, S02SectionStatus, S02ScreenOtherDetails, S02ScreenDate, S03SectionStatus, S03PainAssessmentDate, S03PainAssessmentRepeatedDate, S04SectionStatus, S04DischargePlanDate, S04DischargePlanNot24HrsOtherDetails, S04DischargeDate, S04AdditionalComments\_NK

Import CSV File:

Choose File 20210211\_...rt Test file.csv

Ignore first/header row: ☒

rDischarge	S04EOLPlan	S04AdditionalComments
Y	0	<p>Q2.2 : 'Please enter the date of the first assessment identified above' is required</p> <p>Q3.1.a : 'Enter the date of the pain assessment' is required</p> <p>Q3.2.a : 'Enter the date of the repeated pain assessment' is required</p> <p>Q4.1.a : 'Date discharge plan initiated' is required</p> <p>Q4.5 : 'Date of discharge' is required</p>
		<p>Q1.1 : The patient must be in hospital at for at least 24 hours before they are eligible</p> <p>Q2.2 : 'Please enter the date of the first assessment identified above' is required</p> <p>Q3.1.a : 'Enter the date of the pain assessment' is required</p>

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:



unknown-ORG1 ▾

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## 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

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19 items in 2 pages