

**Department for Education and Skills**

## **CiN Data Handling Guide**

**4<sup>th</sup> May 2005**

# Contents

<b>1. INTRODUCTION</b>	<b>3</b>
<b>2. AUDIENCE</b>	<b>3</b>
<b>3. IMPORTING DATA INTO CIN</b>	<b>3</b>
<b>4. EXTRACTING DATA FROM CIN</b>	<b>3</b>
EXTRACTING BASE TABLES	3
EXTRACTING REPORT DATA	4
<b>5. MANIPULATING DATA OUTSIDE CIN</b>	<b>4</b>
USING ACCESS	4
USING EXCEL	5
<b>6. DATA HANDLING SCENARIOS</b>	<b>6</b>
SCENARIO 1: USE DATA FROM ANOTHER SYSTEM	6
SCENARIO 2: UPDATE RECORDS	7
SCENARIO 3: EXTRACT CIN DATA FOR ANALYSIS	8
SCENARIO 4: USE MS ACCESS QUERIES	8
SCENARIO 5: CONVERT CIN DATA TO XML	9

## 1. Introduction

This document aims to give CiN users ideas on how to handle data outside of the main CiN application. It is not meant to be a step-by-step "how to" guide.

## 2. Audience

This document is intended to be read by users of the CiN system that come from a non-technical background. In order to achieve some of the tasks mentioned in this guide it is likely that the users will need to enlist the help of expert users or IT staff, I have indicated where this is likely to be the case.

## 3. Importing data into CiN

There is only one way to import data into CiN which is to use the bulk load spreadsheets. Here, importing means the transfer of two or more records simultaneously into the system. You are however free to extract data from any other data source and load it into bulk load spreadsheets.

## 4. Extracting data from CiN

### ***Extracting base tables***

Base tables are the core set of tables that you complete i.e. Individual Work, Cost Centres, Workers etc.

There are two data formats available when extracting data from the base tables. The first is text format; if you select this then your data will be saved in a file that can be read by MS Access, Excel or Word.

The second format is HTML this will allow your data to be view in a standard web browser.

This extract is performed by:

1. Opening the table you want to extract from the CiN system
2. Selecting "File"
3. Click "Export Data To File..."
4. When the "save as" dialogue appears you are able to specify the data format

### ***Extracting report data***

Report data is extracted to Excel.

The main advantage of extracting report data is that it allows you to extract data from several base tables at once, using SQL to join the data from different tables. If you can't find the report you need in the list of available reports you will probably need an "expert user" or IT support to help you create the report you require.

Once your report is available you can export it by:

1. Selecting "Reports"
2. Click "Export Report..."
3. Select the report you require from the list of reports available and click "Export"
4. Specify a filename and location in the "save" dialogue box
5. Open Excel and view the file you have created

## **5. Manipulating data outside CiN**

It is possible to extract data from CiN and load it into a variety of applications. I shall only look at MS Access and Excel as these will give you an example of what can be achieved.

Once the data have been manipulated you can then put it back into bulk load spreadsheets to be loaded into CiN, or you can use the data for your own purposes.

### ***Using Access***

To get the data into Access use the "Get External Data" functionality available from the "File" menu.

Once that data is in Access you can update the data using Update, Append or Delete queries. **If you are not familiar with data manipulation queries you should seek the help of either an "Expert User" or IT Support before running them.**

Update queries can be used to update many records at once. They can either update all records or just those records that match specified criteria such as children that have the looked after flag set to true.

Append queries can be used to add rows to the end of a table. You may want to use this to pull data together from a variety of data sources prior to doing the initial bulk load.

As the name suggests the Delete query is used to remove rows of data from a table. It can either delete all records or just those records that match specified criteria. It is important to remember that to remove multiple rows of data from the CiN database you will need to use the bulk delete function and that this function will remove all records that are in the bulk load file you are using for input to the bulk delete. So if you are using the delete query in Access to prepare a set of data to be removed from CiN you will need to delete the rows of data you want to keep!

And finally please remember **always backup your database before running data manipulation queries.**

### ***Using Excel***

There are several ways to load data into Excel. The three you are most likely to use for CiN data are;

- Export a report from CiN straight into excel
- Text Export from CiN to text file then open the text file from Excel
- Copy from another Windows application and paste into Excel

Once your data is in Excel you can manipulate it using all the data manipulation and presentation tools available, these include, but are not limited to: Sorting, Find & Replace, Filtering, Pivot Tables, Graphs, Formatting, etc.

If you do not have much experience of using Excel, but need to manipulate data I suggest that you ask a more experienced colleague to spend some time to give you an overview of what can be done using Excel.

## 6. Data Handling Scenarios

This section outlines some common data handling requirements and then gives a number of possible solutions to the requirement and finally gives a recommendation as to which solution is best suited to the requirement.

The reason for giving a number of solutions is that each solution may require different amounts of effort and IT knowledge in order to achieve them. To highlight this each scenario has an Overhead and Tech Level rating.

Low overhead means that it should be fairly quick to carry out the solution and a high overhead will mean that it will be a time consuming process.

Low tech level means that most users should be able to understand and carry out the solution and a high tech level means that the solution will probably require the assistance of either “expert users” or IT staff.

### ***Scenario 1: Use data from another system***

**Requirement:** You want to use data from another system to populate a CiN table, but the system you want to use does not contain all the fields CiN requires.

**Option 1:** Extract the data from the source database and put it into a bulk load spreadsheet.

Work your way through the spreadsheet filling in the blanks as you go

**Overhead:** Low/Medium (depending on amount of data)

**Tech Level:** Low

**Option 2:** Extract the data from the source database and put it into an MS Access database.

Add the missing fields to your table.

Write a query that shows records that have missing fields. Use this query as either the input for a simple data entry form, or use the “data view” of the query to update the data.

**Overhead:** Medium

**Tech Level:** High

**Recommendation:** If there are only a few records then I would recommend option 1, otherwise option 2.

## **Scenario 2: Update records**

**Requirement:** You realise that a group of children that were bulk loaded have not been set as looked after when they should have been.

All of the children with the missing looked after flag are related to a particular location and each location was responsible for submitting its own bulk load file for children.

The location in error can supply you with a list of children that should be marked as looked after.

**NOTE:** Although this scenario mentions the Looked after field this is only an example: the options outlined could be applied to a number of different data items.

**Option 1:** Load the bulk load file into MS Access.

Load the list of looked after children into MS Access.

Create a delete query that deletes all records in the children's bulkload table that do not have a corresponding record in the children looked after table.

Create a query that updates the looked after field to "Yes".

Export the bulkload table to Excel and put the data into a bulkload spreadsheet.

**Overhead:** Medium

**Tech Level:** High

**Option 2:** Manually change each record in the database using the CiN application.

**Overhead:** Very High

**Tech Level:** Very Low

**Option 3:** Manually change each record in the bulk load spreadsheet and then load the data into CiN.

**Overhead:** High

**Tech Level:** Low

**Recommendation:** If you have an "expert user" or developer available then I would recommend Option 1 as this is likely to be both the quickest and the most accurate as it lowers the risk of human error associated with data entry.

If you do not have an “expert user” or developer available then I would recommend option 3 as this is likely to be a bit quicker than option 2.

### ***Scenario 3: Extract CiN data for analysis***

**Requirement:** You want to extract data from CiN and analyse it in MS Excel.

**Option 1:** Run a Report to export the data you require. If there is no report to match the data you want to extract then get an “expert user” or developer to create one for you.

**Overhead:** Low

**Tech Level:** Low (High if report needs to be created)

**Option 2:** If you want a straight copy of a CiN table then use the “export data to file” option on the file menu when you have the required table open. This will allow you to create a text file that can be imported into MS Excel.

**Overhead:** Low

**Tech Level:** Low

**Recommendation:** As option 1 exports directly to Excel I would generally recommend this option.

### ***Scenario 4: Use MS Access Queries***

**Requirement:** You want use MS Access to create queries/Access reports to analyse CiN data.

NOTE. You will not be able to use data manipulation queries.

**Option 1: IF YOU HAVE ACCESS 97.** Open the cin4.mdb file and create any queries you want to use.

**Overhead:** Low

**Tech Level:** Low

**Option 2: IF YOU DO NOT HAVE ACCESS 97.** Create a new empty Access database and link to the CiN database tables using the Access “get external data” functionality on the file menu.

**Overhead:** Low

**Tech Level:** Medium

**Recommendation:** If you have access 97 use option 1, otherwise use option 2.

**Scenario 5: Convert CiN data to XML**

**Requirement:** You want to export data from CiN and convert it to XML.

**Option 1:** Use either VB or VBA. In references make sure ADO is selected. Use ADO object model to create a recordset containing the data you require and then use ADO's functionality to save the data to an XML file.

**Overhead:** Medium

**Tech Level:** Very High

**Recommendation:** There is only one option for this requirement.