



CAB Local Information System Implementation Notes



**Constructive
IT Advice**

Andy & Margaret Henderson
Constructive IT Advice

Table of contents

1	Implementation	2
1.1	Role of the co-ordinator.....	2
1.2	Training	2
1.3	Manage people’s expectations	3
1.4	System availability.....	4
1.5	Feedback and follow up	4
1.6	Web links.....	4
1.7	Leaflets, application forms and other paper documents	5
1.8	Review.....	6
1.9	Search terms	6
1.10	Advisers’ area.....	6
2	Management.....	8
2.1	Take data backups.....	8
2.2	Check web links.....	8
2.3	Check document links	8
2.4	Repair and compact the database	8
2.5	Review system logs	8
3	Data capture	9
3.1	Installing and running the data capture spreadsheet.....	9
3.2	Capturing data from Microsoft Excel	11
3.3	Capturing data from Microsoft Word	12
3.4	Capturing data from Microsoft Access	13

1 Implementation

1.1 Role of the co-ordinator

We believe it is important to have someone who takes overall responsibility for:

1. Database maintenance
2. Paper files; and
3. Leaflets, forms and other material kept for giving out to clients.

A co-ordinator ensures:

1. Regular review of material to keep it current
2. Overall consistency and quality of the data
3. The system and supporting material are all easily accessible to advisers
4. Database housekeeping procedures (see on) are followed.

They also provide a focus for deciding:

1. What data the database will hold
2. What data the database will not hold
3. How best to ensure the database meets the needs of advisers and their clients.

It is unlikely that all bureaux will be able to appoint a dedicated local information co-ordinator. However, having one person take the co-ordination role is important if the local information system is to be effective and useful.

We do not anticipate that one person will have to do all the work, however. The maintenance program can be used by more than one person at the same time. It also includes a feature to allow a co-ordinator to review the changes made by others.

1.2 Training

Advisers

Advisers will need some training and encouragement to use the system. Particularly in using the Search. If they don't find what they need straightaway, they can get discouraged easily.

Specifically, they need to know that:

- All search facilities are slightly different
- Putting in fewer terms in a first search is recommended rather than being too specific
- Using parts of words can be more effective than full words (for example "tenan" rather than "tenancy" or "tenant")
- The 'Search' and 'A-Z' buttons work differently and each have their advantages
- Short words, such as "and", "for" and "of" are ignored.

People that find using a mouse difficult need to be told about keyboard shortcuts. For example, Alt-S 'clicks' the information system 'Search' button without needing a mouse.

People that have difficulty reading the default fonts in the search results window need to know about the 'Text size'/'Zoom' button at the top of the results window.

There are a variety of ways to train people:

- Formal training sessions for individuals or groups
- Informal demonstrations can be a good way to get people talking about how best to use the system in practice
- Use of available opportunities during advice sessions to remind advisers to use the system and offer help where needed
- Reminders that there is comprehensive 'how to' information available via the 'Help' button
- 'Hints and tips' to supplement the help text - we provide that in the 'Advisers' area of the system, see below.

We have made sure that the database displays a unique 'Database reference' against each item so that, if you think it necessary, people can refer to the items they used as part of a client's case notes.

People that maintain the database

Everyone that helps maintain the database will need basic training in using the maintenance program, and guidance on:

- Adding search terms
- Using web and document links
- Reviewing older items in the database and in the paper library.

We have created a Word document of instructions and procedures for people maintaining the database (and supporting paper library) as a way to ensure consistent treatment of information in the system.

Note that it is possible to allow advisers to update the database themselves. However, we believe restricting maintenance to just a few people that work together helps ensure consistency and quality of data.

1.3 Manage people's expectations

The system is limited by:

1. The data it contains
2. The search terms it uses
3. People's searching skills.

People need to know that it will take a little time and effort to get the most from the database.

If you are building the database from scratch, you will need to have sufficient data before introducing people to it or they will become disenchanted. If you are starting with a limited scope, you should make that clear from the outset.

1.4 System availability

We have found it important to make the system available wherever it might be needed - including client interview rooms.

The system uses a single copy of the database stored on a central PC (which doesn't need to be a server) so changes to the database are available to everyone immediately.

We supply management utilities for making changes to the database programs stored on each PC. These allow you to make most changes centrally in one place, and the system automatically distributes the changes to the other PCs in the network.

1.5 Feedback and follow up

In our experience, training needs frequent follow-up - at least in the early stages - to remind people that the database exists and how to make good use of it.

We found it helpful to ask people how they were doing with the system. You need to be sure that the search terms you are using are getting advisers to the data they need, for example.

The system has a useful logging facility to help you with this. It logs:

- Each time the enquiry program is started - so you can see how often it's being used; and
- All search requests - so you can see what people were looking for, and how many matches they found.

We find it a particularly useful way to spot:

- When people are using over-elaborate search terms; or
- Items that need improved search terms.

It is also useful to enlist the help of Session Supervisors to remind advisers to use the system and collect feedback.

1.6 Web links

To ensure information provided by the local information database is as up-to-date as possible, we link to information on the web as much as we can. That way the information is automatically updated by the information provider.

For example, our item on GPs refers to web page:

www.nhs.uk/england/doctors/nearestSearchResults.aspx?pc=KT18+5AG&page=1

This page lists all our local doctors and is updated automatically by the NHS.

Note that, as in this case, some of the best 'local' resources are sometimes national.

1.7 Leaflets, application forms and other paper documents

We do not keep all our local information in the database. In theory, we could scan forms and leaflets into the system which would make all the information available electronically. But we think that's an unnecessary overhead.

We hold two types of paper:

1. One-off copies of leaflets, application forms and promotional documents
2. Multiple copies of leaflets, booklets and application forms for giving out to clients

One offs

We keep these in ring binders. We index them using the same 1 to 14 categories as the national information on AdviserNet and then subdivide as appropriate. We then add an entry to the local information database for each item.

We add the national information category as a search term for the entry. For example, housing forms would be filed under section 11 for "Housing" so we add "Housing" to the search terms.

We number each file entry and include that number in the 'Ref' box in the database.

We find it useful to date items in the ring binders so older items can easily be identified and replaced as necessary.

We try to be ruthless in judging what should be added to the paper files. We keep just the documents that give more information than we can easily hold in the database.

We have some Word documents that provide lists of contact names for, say, accountants, or insolvency practitioners. We don't hold printed copies but link to the Word document from the database instead.

Material for giving out to clients

We take a view on whether to keep these in the system at all. Some leaflets are simply placed in the waiting room so clients can help themselves.

Other material is indexed using the national categories and held in filing cabinets. We also cross reference them from the local information system.

We don't bother to date these items. Instead we regularly check to see if we need more copies. We also have a notebook for advisers and supervisors to let the co-ordinator know if stocks are running low.

1.8 Review

We review most items at 6-monthly intervals. We use the 'Change' button in the maintenance program to review entries that haven't been changed for six months.

We give more date sensitive items a specific review date in the local information database. We use the 'Review' button in the maintenance program to find these entries.

The co-ordinator uses the 'Recent' button in the maintenance program to check items that support workers have updated.

We try to be ruthless with out-of-date information since it jeopardises the value of the entire database if advisers find they are using data that cannot be relied on.

1.9 Search terms

Search terms are key to helping advisers find the information they are looking for.

Most items in our database use at least one of the 14 information categories used by the national information on AdviserNet. That provides a degree of consistency between national and local information sources.

We try to imagine what terms advisers might use when searching for data. So, for example, we would use "Doctor" as a search term for an item about GPs.

We also add standard search terms like 'leaflets' so that a search for 'employment leaflets' finds relevant items.

1.10 Advisers' area

We have created an area of the database specifically to carry information relating to Epsom & Ewell CAB itself. This allows us to include information about, for example:

- CASE guidance and training
- Minutes of meetings
- Reference documents
- New items added this month (updated weekly by the co-ordinator).

In other words, we create our own 'Intranet'.

We do this by adding the following search terms to relevant items:

- Adviser
- Advisers
- Advisor
- Advisors.

Our advisers know to use one of these terms when looking for local CAB information. Because matching items are shown latest first, they can easily monitor for new items.

We have set up a 'soft button' in the reader program so advisers can see all the Intranet items by clicking a button in the reader program. The button flashes automatically when the program is started and there are recent intranet items available.

You can find out more about setting up soft buttons, see the 'Updating configuration details' worksheet in the Installation Guide.

2 Management

We regularly do the following:

1. Take data backups
2. Check web links
3. Check document links
4. Repair and compact the database
5. Review system logs

2.1 Take data backups

We have included the local information system - including the database - in our server backup procedure.

Also, just to be sure, we email a zipped copy of the database off site after major update sessions.

2.2 Check web links

The maintenance program has a 'Check links' button that automatically checks the links in the database. We run this once a month. Note that you can spread checking out by specifying a subset of items to check.

Note that link checking runs in a separate window so you can continue to maintain database items while the check is running.

2.3 Check document links

This works in the same way as web link checking but is much faster. Again we run this at least once a month.

2.4 Repair and compact the database

The maintenance program has a 'Repair and compact' button which you can use any time there is no-one else using the database. This feature tidies up the database. We run it once a month unless we suspect there might be problems in the database in which case we run it more frequently.

2.5 Review system logs

We check the system log to assess how much the database is being used and also to see how successful searches have been. We do that once a week. We copy the current month's log file from the local information system systemLogs directory before opening it (opening the log file directly suspends logging while the spreadsheet is open).

3 Data capture

We provide a data capture spreadsheet called CABLICapture.xls to accompany these notes. It comes with a help file called CABLICapture.chm.

The spreadsheet allows you to capture data directly into the database. That's useful in two situations in particular:

1. When you first start to use the local information system, you might be able to convert existing data held on computer into a spreadsheet format. You will then be able to use the utility to capture that data into the local information database.
2. If you have a large number of items to enter into the database, you might find it simpler to enter them through a spreadsheet than to enter them with the maintenance program.

In essence, all you have to do is:

1. Open the spreadsheet
2. Enter one item per line under the headings provided
3. Click the 'Add these items' button.

The spreadsheet checks the data is valid and, if it is, it:

1. Checks your credentials by asking you for your local information database id and password; and
2. Adds your data to the database.

The remainder of this section covers:

1. Installing and running the data capture spreadsheet
2. Capturing data from Microsoft Excel
3. Capturing data from Microsoft Word
4. Capturing data from Microsoft Access

The last three sections might be helpful if you already have some local information data. You can, of course, capture data from scratch if you want by keying it into the spreadsheet directly.

3.1 Installing and running the data capture spreadsheet

Support for trial and error

When you are first setting up the local information system, you might find it useful to:

1. Load some data
2. See how it looks in the system
3. Try it out with a few people
4. Wipe the database
5. Update your spreadsheet and resubmit the data.

6. To allow you to do that we have provided a 'Clear the database' button. Having confirmed you are sure you want to do that and checked your credentials, the spreadsheet wipes all the data from the database.

What you need to run the spreadsheet

You need:

1. Microsoft Excel 2000 or later. The spreadsheet **will not** work with versions of Excel earlier than Excel 2000. Sorry. We have tested it with versions up to Excel 2007.
2. The Epsom & Ewell CAB Local Information System. The installation notes that come with the system explain how to install it. Note you can install the system stand-alone on a single PC while you are capturing data. The installation notes explain how to create a stand-alone installation and how to migrate the system to your network when you're ready.
3. A valid id and password for the system. The system's Technical Overview tells you the default id and password and provides instructions for installing your own.

How to install the spreadsheet

The two files you need are provided in the 'systemDocumentation' directory in the system's installation media.

To install the spreadsheet, copy:

- CABLICapture.xls
- CABLICapture.chm...

...to the local information system's program directory (by default that is C:\Program Files\CITA\CABLocalInformation) on any PC that has the system installed.

Note we suggest you install it only on one PC. It's easy to get confused about where the latest version is, if you're not careful. Keeping it to just one PC eliminates this problem.

Alternatively, you can store the spreadsheet in a central location on a server. You will then be able to open the spreadsheet from any PC that has the local information system installed - provided the system is installed in the default directory shown above.

Before you spend a lot of time capturing data into the spreadsheet make sure you have a method to take regular backups - and make sure you use them!

While using the system, save your work regularly and keep several copies of your work as the data builds up. That way you will not lose all your work if your spreadsheet is deleted or becomes corrupt. You will also be able to revert to an earlier version if you make a mistake that messes up your data.

How to run the spreadsheet

Simply double-click CABLICapture.xls.

You might see a message that says something like “Macros are disabled because the security level is set to Very High. To run the macros, change the security level to a lower setting and verify the macros are signed and trusted”.

To eliminate this problem in versions of Office up to 2007:

1. Click ‘OK’ on the error message; the spreadsheet will open but you will not see the toolbar and buttons that allow you to copy data to the database.
2. Close the spreadsheet immediately without saving any changes
3. In Excel, click ‘Tools’, ‘Macro’, ‘Security’ and change your security level to ‘Medium’.
4. Now re-open the spreadsheet. You will see a message asking if you trust the macros provided by Constructive IT Advice. Click ‘OK’ to proceed. If you click ‘Always trust...’ you can change your security level back to High and the spreadsheet will continue to run OK.

In Office 2007 or later:

1. Click ‘OK’ on the error message; the spreadsheet will open but you will not see the toolbar and buttons that allow you to copy data to the database.
2. Close the spreadsheet immediately without saving any changes
3. In Excel 2007, click the round button at the top left of the window. In later versions, click the ‘File’ tab.
4. Click ‘Options’, ‘Trust Center’, ‘Trust Center Settings...’, ‘Macro Settings’ and change your security level to ‘Disable all macros except digitally signed macros’. Click OK to save your change.
5. Now re-open the spreadsheet. You will see a message asking if you trust the macros provided by Constructive IT Advice. Click ‘OK’ to proceed. If you click ‘Always trust...’ you can change your security level back to its original setting and the spreadsheet will continue to run OK.

Alternatively:

1. Click ‘OK’ on the error message; the spreadsheet will open but you will not see the toolbar and buttons that allow you to copy data to the database.
2. Close the spreadsheet immediately without saving any changes
3. In Excel 2007, click the round button at the top left of the window. In later versions, click the ‘File’ tab.
4. Click ‘Options’, ‘Trust Center’, ‘Trusted Locations’, ‘New location’ and add the folder containing the data capture spreadsheet.

The spreadsheet will automatically install a new toolbar containing the following buttons:

- Validate data – click this button to check the data you have entered is valid
- Add these items – the spreadsheet checks your data and, if valid, adds them for you
- Clear the database – **use with care** – this option empties the database

- Open link – checks whether the highlighted link works correctly
- Help – displays help with using the system.

Note that in Office 2007 and later, the toolbar is hidden away under the ‘Add-Ins’ tab.

Help with using the spreadsheet

If you hover your mouse over any column header containing a red triangle you will see brief help for what you should be entering in that column.

We also provide a ‘Help’ button in the spreadsheet that displays more detailed help with using the data capture features.

3.2 Capturing data from Microsoft Excel

If you already have some local information data that you hold in Excel, you simply need to re-format it into the columns we need for the data capture spreadsheet.

The most obvious way to do that is to cut and paste columns from your spreadsheet(s) into CABLICapture.

Alternatively, you can create a new sheet containing cells pointing to the existing data (enter an = where you want to start the data, click the first cell you want to include and press ‘Enter’. You will see the data from the cell you clicked appear in your new sheet. Now copy and paste the cell down for as many rows as there are in your existing data; and copy it to the right for every additional adjacent column in your existing data that you want to use. Repeat for as many columns as you want.

If you have two columns that you want to stitch together, you might find the ‘Concatenate’ formula useful. For example, this formula:

```
=CONCATENATE (A1, " ", B1)
```

... pieces the text in cells A1 and B1 together placing a space between them.

3.3 Capturing data from Microsoft Word

The simplest way is to have the CABLICapture spreadsheet and your Word document(s) open simultaneously. You can then copy the individual items of text you need from the Word document and paste it into the relevant cell in CABLICapture.

That’s slow but sure.

Alternatively, if you already use Word tables for your data you can simply copy an entire table and paste it into Excel. This will create a spreadsheet from your data. You can then work with it from there as described in the previous section.

If the data is not in tables, you can convert it into tabular form. Read the Word help on ‘Text to table’. You can then paste your data into Excel and work with it from there. We suggest you use ‘Tools’, ‘Options’, ‘View’ and check ‘All’ under ‘Formatting marks’ first. This shows you all the

formatting in your document - which is useful for problem solving. In particular, the 'Text to table' feature can get messed up if you space out items using multiple tabs. It's worth getting inventive with Word's search and replace feature to address problems like this. For example, Word uses ^t to designate a tab character. So replacing ^t^t with ^t and using 'replace all' over and over until there are no replacements made will replace all multiple tab characters with just one tab. Your document might look dreadful, but there's a better chance that 'Text to table' will work correctly.

3.4 Capturing data from Microsoft Access

Once again, the easiest route is to extract your data into Excel and work with it there.

Either of these approaches will copy a table of Access data into Excel:

1. Use the export feature
 - a. Use Access to open your database
 - b. Highlight the table you want to export
 - c. Click 'File save as/Export'
 - d. Select 'To an external file or database' and click OK
 - e. In the 'Save as type' box, select the version of Excel you want to use
 - f. Navigate to the directory you want to use, give your spreadsheet a name and click 'Export'.
 - g. You will then be able to open your new spreadsheet containing data from Access.
2. Use copy and paste
 - a. Use Access to open your database
 - b. Open Excel with a blank spreadsheet
 - c. Double-click the table you want to export to see it in 'Datasheet' view
 - d. Click heading of the first column you want to export to highlight it
 - e. Shift-click the last heading you want to export to highlight it and all the columns in between
 - f. Use 'Edit', 'Copy' to copy the data to your clipboard
 - g. Go to Excel and use 'Edit', 'Paste' to paste the data into Excel
 - h. You can then delete any columns you don't want.