

fc:DataManager

Quick Guide

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Data illustrations are fictional and no similarity to real entities or individuals is intended or should be inferred.

Introduction

fc:DataManager is a comprehensive data cleaning toolset that enables users to perform essential data operations on files with speed and ease. fc:DataManager is the perfect choice for any business or consultancy that needs to leverage the power of data for marketing, stock control, customer communications, engineering and field support ... any activity where data has to be right, all the time.

This Quick Guide will help you to get started with the application. For a detailed description of all the functions of the application, refer to the main User Manual.

fc:DataManager allows you to

- Import data from delimited text files, Excel files and MS Access files
(**See** Page 6 of this Quick Guide for details)
- Remove unwanted characters, trailing or leading spaces, non-printable characters
- Correct capitalisation, upper/lower casing
- Merge two files
(**See** *Merging Data from Files* in the main User Manual for details)
- Combine two files with different data structures
(**See** *Combining Files* in the main User Manual for details)
- Spilt or combine data in fields
(**See** *Unwrapping/Extracting Records and Wrapping/Combining Records* in the main User Manual for details)
- Match two files and exclude duplicate entries
(**See** *Suppress Matching Records* in the main User Manual for details)
- Perform graphical analysis of populated fields
(**See** Page 15 of this Quick Guide for details)

Installation

fc:DataManager can be installed via a CD or web link download. It has two components: the application itself, and a MySQL database. Both these components are supplied and are automatically loaded and linked during the install process.

To install the fc:DataManager application:

If the application was obtained on a CD, insert the fc:DataManager CD in your computer's CDROM and double-click **fcDataManagersetup.exe**. If the application was downloaded, double-click the extracted **fcDataManagersetup.exe**. The Installation wizard opens and will take you through the installation process. Generally, accept the options in the installation process and click the **Next** button to continue the process.

In the last step of the installation process, click **Install**. The application is set up on your machine.

Starting fc:DataManager

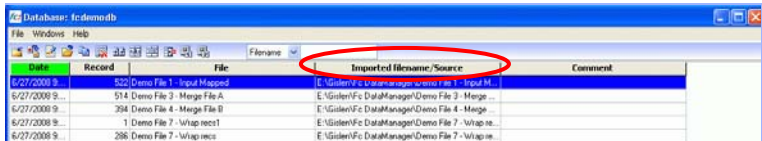
To start the application:

1. Click **Start**→**Program Files**→**fc DataManager** →**fc DataManager**. The Signon dialogue opens.
2. Enter the **Username** and **Password**. When you start the system for the first time, enter the user name and password of your choice. You can also select a "Forgot Password" question and enter an answer. The password is case-sensitive. **Note your choices and keep them secure:** you will need them for future access to the utility!
3. Select the **Database** and click **OK**. By default, the system creates a database fcdemodb for you to get started. You can create your own databases.
(See Page 5 of this Quick Guide for details)

Once you have successfully signed into the system, the main screen appears.

User Interface

The fc:DataManager user interface is shown below.











The user interface lists any files that have been imported into the system, showing their original names, their fc:DataManager names, and other details such as date imported and number of records.

To sort the list in ascending/descending order of the selected column, click on a column heading. To change the sort order, click the heading again. To locate files in the list, select the search criteria and enter a part of the name in the field provided.

Menu and Toolbar Buttons

The menu options and toolbar buttons available in the user interface are summarised in the following table.


Name	Toolbar Button	Use
File → Import		Import a data file quickly See Page 6 of this Quick Guide
Comments/History/Definition		Display file details, comments and history, and set file permissions See File History/Comments/Definition in the main User Manual for details
Open file		Display the selected file See Page 9 of this Quick Guide
Copy file		Copy the data in the selected file See Copying a File in the main User Manual for details
Delete file		Delete the selected file See Deleting a File in the main User Manual for details
Combine files		Combine the data in two files

Name	Toolbar Button	Use
		See <i>Combining Files</i> in the main User Manual for details
Detailed Merge		Merge data from two files See <i>Merging Data from Files</i> in the main User Manual for details
Simple Merge		See <i>Merging Data from Files</i> in the main User Manual for details
Suppress matching records		Create a new file containing records that either exist only in the first file or exist in both files See <i>Suppressing Matching Records</i> in the main User Manual for details
Unwrap / extract records		Create a new file by splitting the records in the selected file See <i>Unwrapping/Extracting Records</i> in the main User Manual for details
Wrap / combine records		Create a file containing records that are combined from several records in the selected file See <i>Wrapping/Combining Records</i> in the main User Manual for details
Database Maintenance – Create Database		Create a new database See Page 5 of this Quick Guide
Change Database		Change the current database
Delete Database		Delete the current database
Security - Usernames		Manage users See <i>Configuring Users</i> in the main User Manual for details
Set password		Change password See Page 5 of this Quick Guide
Authorise system access		Set authorisation code for system access See <i>Authorising System Access</i> in the main User Manual for details
Exit		Close fc:DataManager
Windows		Select an open window to view See <i>Switching Between Currently Open</i>

Name	Toolbar Button	Use
		<i>Windows</i> in the main User Manual for details
Help → Contents		Opens the help system
About		Display details about fc:DataManager

Changing the Password

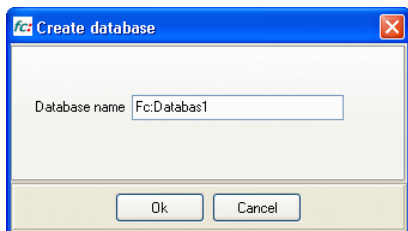
To change your password:

1. Select the **File→Security→Set Password** option in the main menu. The Change Password dialogue appears.
2. Enter the **Current password** and the **New password**.
3. Re-enter the new password in the second **Confirm Password** field.
4. Select the question you want as the **Password hint** in case the password is forgotten and enter the **Answer** to that question.
5. Click  to save the password.

Creating a Database

To create a new database:

1. Click the **File→Database maintenance→Create database** menu option. The Create database dialogue opens as shown in the figure below.



2. Enter the **name** for the database and click **Ok**. The new database is created and the opens. The files you now import will be saved in this database.


Importing a Data File

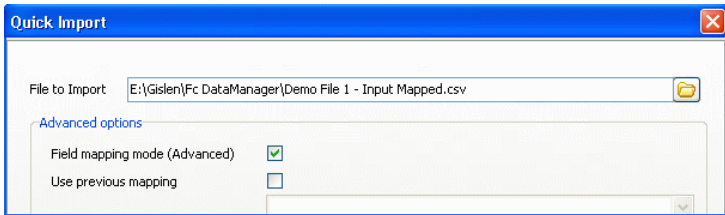
fc:DataManager operates on data saved in .csv (text delimited), MsExcel (.xls) or MsAccess (.mdb) files. MsExcel files that are password-protected must be saved without a password before they are imported into the system.


Files can be imported in one of the following ways:

- Using simple import – This is a simple import operation where the user selects a file and starts the import process.
- Mapping the import fields to existing fields - This enables fc:DataManager's automated features. For example, mapping a full name will separate the first and last names and copy the initials into a separate field.
- Extended Import – This method can be used when the above import methods fail. In this method the contents of the file are read cell by cell thus making the process slower than the other two methods. This method works only with .csv files. **See *Importing a Data File*** in the main User Manual for details

To import a file using the simple import process:

1. Click **File→Import** or click the  toolbar button. The Import file dialogue appears as shown below



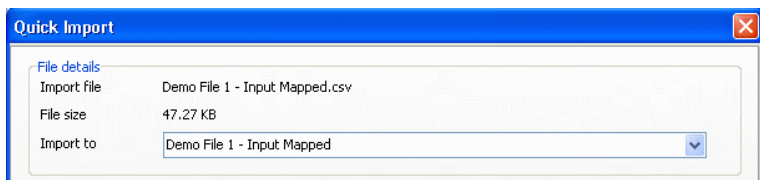
2. Click the  option and select the required file in the Select file to import dialogue that opens. Click **Open**.

3. For a simple import, clear the **Field mapping mode (Advanced)** check box and click **Next**.
4. Specify the **Column delimiter** of the source file by selecting the appropriate option. If the delimiter is not a comma, tab or semicolon, select the **Others** option and enter the delimiter in the space provided. The data in the first 100 records of the file is displayed.
5. If the first row of the import file contains the column headers, select the **First row has column names** check box.
6. If any of the data is enclosed in quotes, select the appropriate **Text Qualifier**.
7. Select the **Row delimiter**.

To customise the data import process to match your needs, click the **Settings** button. The Import Settings dialogue opens. The dialogue has tabs in which you can set options for Titles, Address, Names and Telephone format. **See *Setting the Import Process Options*** in the main User Manual for details.

The internal database structure has pre-defined fields such as Title, Salutation, First name, Last name, etc. The database has 60 additional text fields that can contain any type of data.

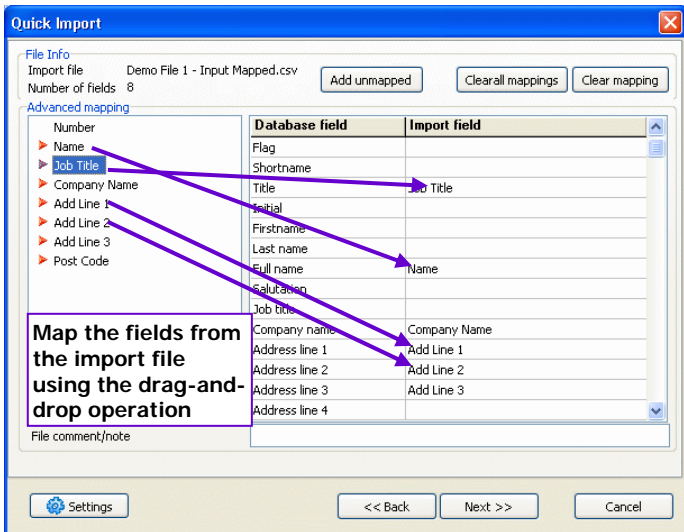
Click **Next** to proceed with the import. Enter or select a name for the import file and click the **Import** button in the final screen of the Quick Import wizard. The file is imported into the system based on the settings configured in the earlier steps.



To import a file using the extended import process:

1. Repeat steps 1 and 2 as detailed in the previous section.
2. Select the **Field mapping mode (Advanced)** check box. You can do one of the following:

- Use mappings from a previous import – select the **Use previous mapping** check box and select the required import in the drop-down list
 - Define mappings for this import - – select the database fields into which you want to import the data. To define the mapping for the import, clear the **Use previous mapping** check box.
3. Click **Next**. The page in which you can define the mappings appears as shown below.



The left panel of the page contains the fields in the import file and the right panel the mappings. The first column in the right panel displays the fields in the internal database and the second column the imported fields.

To clear all existing mappings, click **Clear all mappings**.


To clear a specific mapping, select it in the right panel and click **Clear mapping**.

To map the fields, click on a field in the left panel and use the drag-and-drop operation to map it to the appropriate **Import field** cell.

4. Enter any **comment/note** (optional) for the file.
5. Click **Next**. In next screen of the Import file wizard configure the import process options. **See** *Setting the Import Process Options* in the main User Manual for details.

Once you have configured the process options, click **Next** and then click the **Import** button in the page that opens. The file is imported into the system based on the settings configured in the earlier steps.




Opening a File

To open a file, select the file in the fc:DataManager main window and click the **File→Open File** menu option or the  toolbar button. Alternatively, double-click the file in the list. The file details are displayed in a new window as shown below.






Shortname	Job Title	Initial	Firstname	Last name	Name	Salutation	Company Name	Add Line 1
PUBLICIS	Managing Director	A	A	Tulloch	Mr A Tulloch	Mr Tulloch	PUBLICIS LTD - ...	Kings House
TEQUILA/LOND...	Personnel Officer	G	G C	Lauersson	Mr G C Lauersson	Mr Lauersson	TEQUILA/LOND...	North Gate
CHELWOOD	Practice Manager	S	S	Anderson	Mrs S Anderson	Mrs Anderson	CHELWOOD TR...	Kidlington
CDP	Training Advisor	J	John	Grant	John Grant	Mr Grant	CDP TRAVIS SU...	Rotherfield Greys
FLAG	Group Account Di...	J	John	Hunter	Mr John Hunter	Mr Hunter	FLAG TELECOM	Bowater House
WEBPLACING	Chairman	D	Denise	Bell	Mrs Denise Bell	Mrs Bell	WEBPLACING	Peterborough

The menu options and toolbar buttons available in the file window are summarised in the following table.


Name	Toolbar Button	Use
File→Copy data to clipboard		Copy data in file to clipboard See <i>Copying Data in a File to the Clipboard</i> in the main User Manual for details
Copy file		Copy data in file to a new file See <i>Copying Data to a New File</i> in the main User Manual for details
Copy to Excel		Copy data in file to an Excel file
Export		Export data to a .csv file See Page 11 of this Quick Guide

Name	Toolbar Button	Use
Create cross-tab analysis		Create cross-table analysis See <i>Creating Cross-Table Analysis</i> in the main User Manual for details
Autobackup		Set auto backup options See <i>Setting the Automatic Backup Options</i> in the main User Manual for details
Close		Exit the file display
Edit→Cells		Edit the data in cells directly
Record		Edit data in entire record (in new window) See Page 12 of this Quick Guide
Find record		Search record (with replace option) See <i>Searching for Data in a File</i> in the main User Manual for details
New record		Create a new record See Page 12 of this Quick Guide
Delete record		Flag selected record or all records as deleted
Undelete record		Clear delete flag for selected record or all records
Update data		Update data in record See <i>Updating Data in a File</i> in the main User Manual for details
Clean data		Clean data in record See Page 15 of this Quick Guide
De-duplicate		Check and remove duplicate data See Page 13 of this Quick Guide
View→Select columns		Select the columns for display See <i>Setting Columns for Display</i> in the main User Manual for details
Filter record		Filter records based on a query See <i>Setting a Query Filter</i> in the main User Manual for details
Statistics		View the chart and analysis of data in file See Page 15 of this Quick Guide

Name	Toolbar Button	Use
Record count		View the number of records in the file See <i>Viewing the Number of Records in a File</i> in the main User Manual for details
Refresh list		Refresh data in grid
Sort data		Sort data in ascending or descending order of the selected columns.
View buttons		Toggle view of toolbar buttons in the window
All records		Select an option to view the required records
Not deleted		
Deleted only		
Match count=0		
Match count=1		
Multiple matches		

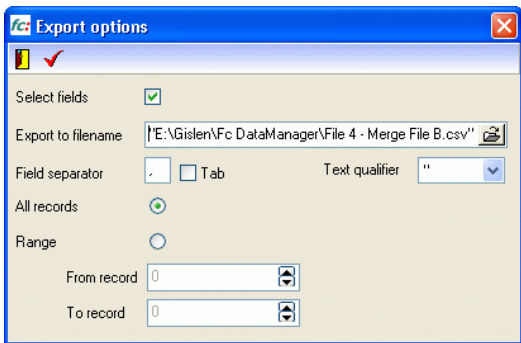
Exporting Data to a New File

To export selected data from the current file to a new file:

1. Open the required file and click the **File→Export** on the menu or the  toolbar button. The Export options dialogue appears as shown in the figure on the next page.

To set the fields to export, ensure the **Select fields** check box is selected.


To set where the data will be exported, enter or select a **filename**. The filename must have a .csv extension.





Enter the **Field Separator**. If the field separator is a TAB, select the **Tab** check box.

If the text in the file uses a **Text qualifier**, select it in the drop-down list. Select “none” if there is no text qualifier in the file.

To export all the records in the current file, select the **All records** option. To export a range of records, select the **Range** option and then enter or use the controls provided to select the range.


2. Click . If you have selected to set the fields for export, the Set Columns dialogue is displayed. The selected data is exported to the new file and a message appears.


Click  or  to close the Export options dialogue.



Adding/Editing Records


You can add a new record, or edit records in the currently open file.

To add a record:

1. Open the required file and click the **Edit→New record** menu option or the  toolbar button. The Record view dialogue appears.
2. Enter the data for the fields in the record. Press **ENTER** to navigate to the next cell.

- Click  to save the new record. The new record appears in the grid.


To edit the data in a record, select the record and click **Edit→Record** on the menu or the  toolbar button. Make the required changes and click .

To delete a record, select it in the file display and click the **Edit→Delete record** menu option or the  toolbar button. The system prompts you to select if you want to set the delete flag for all the records in the current file or for the selected record.

A "D" appears in the Flag column for the record. If the Flag field is not visible, use the **View→Select columns** option.

See Setting Columns for Display in the main User Manual for details.


The flagged records will be permanently deleted after confirmation when you close the file view.

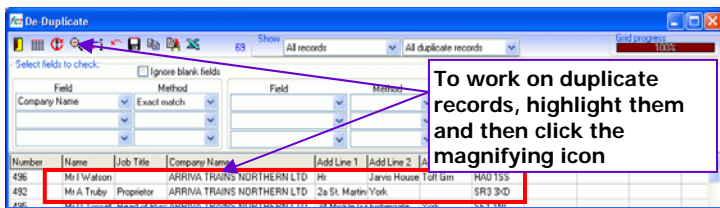
To remove the delete flag set for a record, open the file and click the **Edit→Undelete** record menu option or the  toolbar button. Make your choice in the message prompt displayed.


Removing Duplicate Data from a File


The De-duplicate function of fc:DataManager allows you to remove duplicate data from an existing file.


To de-duplicate data:

- Open the required file and click the **Edit→De-duplicate** menu option or the  toolbar button. The De-Duplicate dialogue appears as shown below.



2. Select the fields you want to check for duplicates and the criteria to use in the drop-down boxes provided in the **Select fields to check** panel and then click . The duplicate fields are displayed in a grid in the lower portion of the dialogue as shown in the above figure.


The records that appear to be duplicates can be isolated and worked on. Highlight the duplicate records by pressing the **Shift** key while you click on them and click the  option. Add records, move data from other records or delete duplicate records in the Details window.

To update the data in a particular field, select the **Field** and enter the appropriate value in the **To value** fields located in the **Update** panel and click .


To clear the data in the selected field, leave the **To value** field blank. You can select multiple fields to update.


To add a new field, click the  button. In the File details dialogue, scroll down the list and enter the name of the new field in any of the free **Additional** fields. Save the new field.

To select the records you want to view, use the **Show** panel at the top of the De-Duplicate dialogue. You can select view 'all', 'deleted', 'duplicate' or 'unique' records. The number of records displayed in the grid is indicated adjacent to the **Show** panel.

To flag a record for deletion, select the record in the grid and click . The Flag field for the selected record/all records, based on your choice, is set to "D". The flagged records will be permanently deleted after confirmation when you close the file view.

To clear the delete flag for a record, select the record in the grid and click .


To export the data to a .csv file, click the  button. See [Exporting Data to a New File](#) on page 11 of this Quick Guide for details.

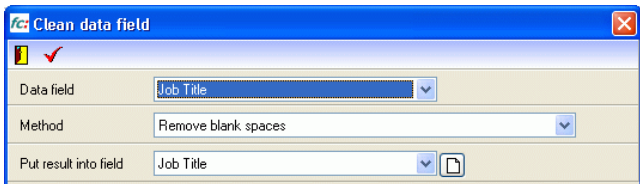
Click  to exit the dialogue.

Cleaning the Data in a File



You can clean data in the currently open file — remove blank spaces, non-numeric or non-alphabetic characters, change case, and so on. You can also set values to fields in the file.


To clean data:


1. Open the required file, select a column in the grid and click the **Edit→Clean** data menu option or the  toolbar button. The Clean data field dialogue appears as shown below.



2. Select the **Data field** you want to clean.
3. Select the **Method**. Refer to the main User Manual for an explanation of the available methods.
4. Select the field into which you want to place the result of the clean operation in the **Put result into field** drop-down.

To place the cleaned data into a new field, click the  button. In the File details dialogue, scroll down the list, enter the name of the new field in any of the free **Additional** fields and click the  button to save the new field.


Once you have configured the clean operation, click . A message appears. Click **Yes** to update all records and **No** to update only the current record.

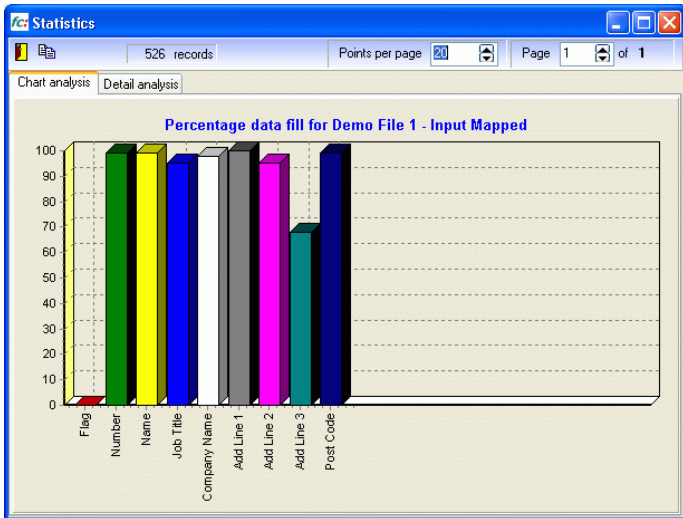
Click  to exit the dialogue without saving the changes.

Viewing the Statistics

You can view a graph of how populated a field is and the detailed analysis for each field in the file.

To view the statistics:

1. Open the required file and click the **View→Statistics** menu option or the  toolbar button. The Statistics dialogue opens as shown below.



2. The graph in the **Chart analysis** tab indicates the percentage of data filled in each field in the file. The number of records in the file is displayed on the top of the dialogue.

To view the details for a particular field, click the bar for that field. The Data Analysis dialogue appears. The dialogue has options to view a pie chart, bar chart, legends and set filter queries. **See Data Analysis** in the main User Manual for details

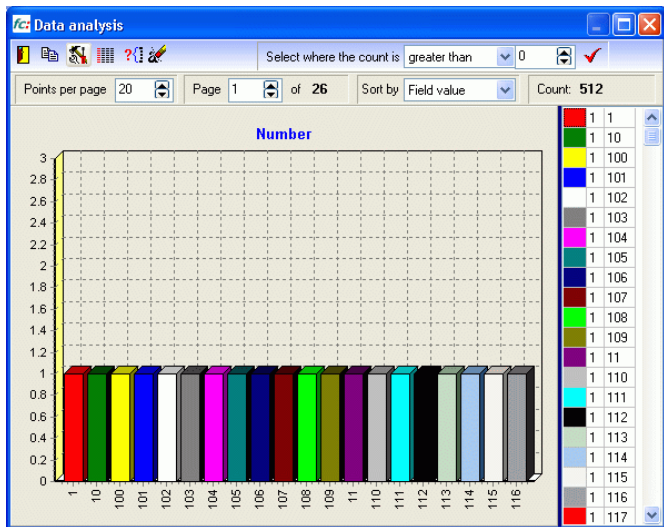
To view the detailed analysis for each field, click the **Detail analysis** tab. The number of records containing data and the percentage for each field in the file is displayed.


To view the details for a particular field, click the appropriate  option for that field. The Data Analysis dialogue appears.

To copy the chart to the clipboard so that it can be pasted into any application, click .


To close the Statistics dialogue, click .

To view the analysis of data in the file, click the bar for that field. The Data Analysis dialogue appears as shown in the following figure.



 **Tip:** If the bar chart looks compressed, position your mouse on the corner of the dialogue and use the double arrow handle to adjust the size of the dialogue.

The Data analysis dialogue displays the number of entries in the selected field. Each unique entry is allotted a separate colour.

To set the selection type, click . In the Set field setting dialogue that appears, do one of the following:


- Calculate on whole field - analyse on the whole field
- Calculate on first 'x' characters - analyse on the specified number of characters taken from the beginning of the field

To exclude blank records from the analysis, select the **Exclude blank records** check box. Click **OK** to start the analysis. The chart is refreshed according to the result of the specified analysis.

To view a shortcut menu, right-click on a bar in the graph and select an option in the shortcut menu displayed.

To set the filter query on the selected field, click **Set filter on: <entry>**, where <entry> is the value in the field.

To add the selected field to the select or exclude filter query, click the appropriate **Add <entry>** to filter option in the right-click shortcut menu.

To select to view records based on the count, first select the option in the **Select where the count is** drop-down, then enter the number or use the controls to set the number and click .

Click  to close the Data Analysis dialogue.

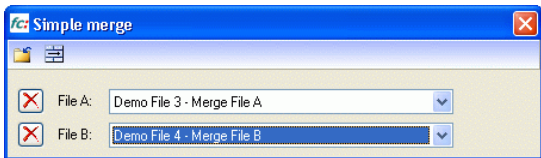
Merging Data from Files

You can take data from two files and merge it into a new file. There are two types of merge: simple and detailed. This manual explains the simple merge process. Refer the main User Manual for the Detailed Merge process


To merge data from different files using the simple merge:


1. Select one of the files you want to merge in the file list on the main window of the application and then select the

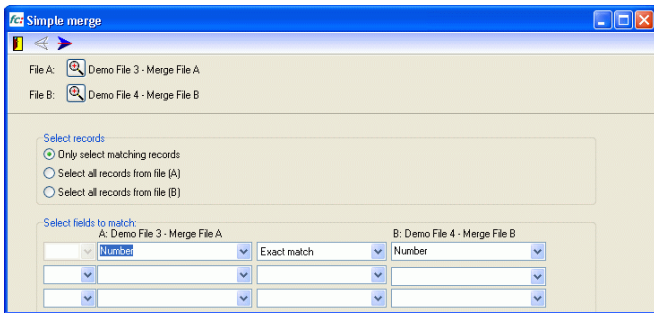
File→Simple Merge menu option or click the  toolbar button. The Simple merge dialogue appears as shown below.




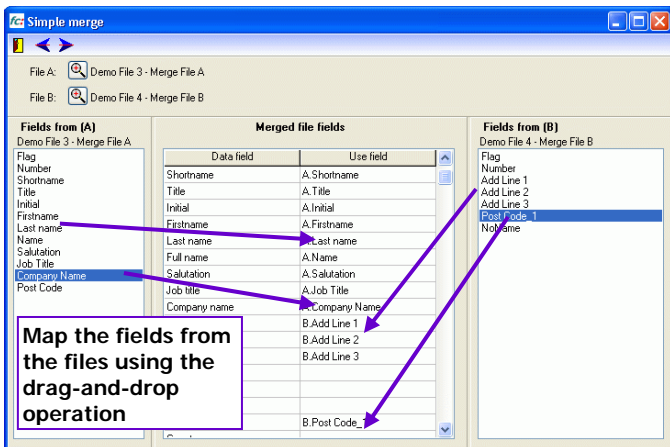
2. Without closing the dialogue, go back to the main window and double-click the second file you want to merge from the list. The second file is added to the dialogue as File B.

If you want to delete any of the selected files, click the appropriate  button.


- To continue with the merge, click the  button. The Simple merge wizard opens as shown in the following figure.




- Select the records you want to merge. In the **Select records** panel, you can select all records from file A or file B, or select only matching records.
- Select the fields you want to match from File A and File B, and the matching method using the drop-down boxes provided. You can select up to 3 criteria for the matches. For multiple criteria, use the bracket ["(" and ")"] options and logical options [and, or] available in the drop-down boxes at the start and end of each row in the above dialogue.
- Once you have defined the match, click the  button. The next screen in the simple merge wizard appears as shown in the figure on the next page.
- The left panel displays the **Fields from (A)** and the right panel the **Fields from (B)**. The middle panel **Merged file fields** displays the mappings. The merge process creates a new file and the selections displayed in the middle panel indicate the layout of the new file. The first column in the middle panel displays the internal database fields and the second column the **Use field**.
- To map fields from File A and File B, drag-and-drop the required fields from the left and right panels to the appropriate **Use field** cells.





To clear the mapping in any cell, click in the cell, select the text and press DELETE or BACKSPACE on your keyboard.

- Click the  button to continue the merge process. The final screen of the wizard appears in which you need to enter the **filename** and **Description** (optional) for the new file and click **Merge files**. A message indicating the end of the merge process appears.

Click the  button to exit the merge process. The new file appears in the file list on the main window of the application.

Closing fc:DataManager

To close the application:

Click the  or  button on the main window of the application.