

DATABASE BY DESIGN, INC.

Organize Your Data, Organize Your Business Tips for preparing your data for entering into a database

Organizing Your Data is Important

One of the most overlooked steps of installing a new database system is the process of preparing your data for entry/transfer into the new system. If your data is currently in a spreadsheet, or you are converting from something like Act! contact management software to a custom database solution, there are important reasons why you should spend some time organizing your data for transfer:

Consequences of Unorganized Data	Benefits of Organized Data
<p>Quickly Growing Data File Size - When data isn't organized properly, it wastes a lot of space on the hard drive where it resides. Even though you may have plenty of storage capacity, unnecessarily large data files cause problems in areas like backup, data repair/restoration, and other maintenance actions.</p>	<p>Efficient Data Files - Data files grow based upon the amount of information that is entered. If data is organized properly, the data file has little wasted space, regardless of its size. This makes it easier for the software to maintain the data; hence, less time required for your maintenance tasks.</p>
<p>Inaccurate Search Results - When data isn't organized well, people tend to use the system improperly. For instance, an important date is placed in an unrelated field like 'Alternate Fax' because there is no field for the date. This makes searching difficult, if not impossible.</p>	<p>Consistent Search Results - Having confidence in the ability to find the information you need frees you to be more productive with that information. Instead of having to look in several places within the system, each piece of data has its own location which enhances the accuracy of your searches.</p>
<p>Increasingly Slow Searches - If your data file is large because of inefficient data storage, your software has to work harder to find the data that you request. The result is a slow search. As the data file grows, the searches become slower and slower. If your data could be found in any number of different fields, then you will have to conduct several searches just to find the data you want.</p>	<p>Ever Quick Searching - Getting answers quickly can help you keep customers satisfied by having their questions answered immediately. Quick searching means that you are being more productive instead of spending your time waiting.</p>
<p>Notes/Comments: The Black Hole of Data - Many times, important information is stored in the Notes or Comments fields because there isn't a place for it or it may seem more convenient at the time. This can be devastating to your ability to efficiently locate this information. Notes and Comments fields usually cannot be searched.</p>	<p>Formatted Notes Enhance Information - Ideally, important information should be pulled out of your Notes and placed into their own location in the database. However, in times when this information is kept with Notes, formatting them in a consistent manner will make it possible for your custom software to consistently find information within the Notes. Also, it can enhance the ability of other users to identify and understand the information that is in the Notes.</p>

How Do I Get My Data Ready for Transport?

The Export-Import Dance: If your information is stored within an “Off-the-Shelf” software package, a simple export should provide you with the data in its proper format. Before doing so, make sure that all your information is recorded in its proper location (i.e. Dates are not in the Alternative Fax field). Also, any important or searchable information that is in a Notes or Comments field should be moved to its proper location. If the information can't be moved, then it should be formatted in a consistent manner so that it can be easily transferred to its proper location in the new system. After the data is organized and exported, the new system can then import it.

The Spreadsheet Shuffle: If your data is in a spreadsheet (or in multiple spreadsheets), in addition to the points noted above, take these steps to make sure that the information is properly grouped together:

- 1) Organize the Data:** First, determine the primary elements of the data. A data element can be thought of as the subject of a sentence. (i.e. An ORDER is placed with your company.)
 - A) Identify Descriptions:** Find the data that uniquely identifies each primary data element. Make certain that each element has only one descriptive attribute of each type. (i.e. The order may have a unique ORDER NUMBER, as well as having an ORDER DATE and a PO #.)
 - B) Identify Components:** Determine all the items that can belong to the primary data element. We will call these components. (i.e. Each order consists of one or more individual ITEMS.)
- 2) Save Primary Elements:** Place the information for each primary element into its own spreadsheet. Each record (a complete set of information, like an order) should have its own unique identifier (numbers are best for this).
- 3) Save Components:** Place the information for each component into a separate spreadsheet. Make sure that you can find the record of the primary element that the components describe. You can do so by referencing the unique identifier of the primary element record.



Converting these systems or files may take some time. The consequences of doing a poor job, or no job at all will potentially haunt you for a long time. The benefits of good planning and proper organization will be seen in a smooth transition to your new system, and in enhanced productivity. At Database by Design, Inc. we want to make sure that your transition to an improved database system is as efficient as possible. Contact us so we can help you plan your expansion into better systems.

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