



ClearPoint Strategy

CLEARPOINT DATA LOADER

The problem with data is that it lives in a multitude of places. Typically financial data is separate from HR information, which is separate from customer and marketing information. This is all separate from transactional systems (tracking your operations) as well, which makes it really difficult to prepare a management report. The data is structured differently in each of the measure tracking systems.

All too often the solution to pulling all this data together becomes a central excel document. In addition to requiring repetitive work, adding another step in the reporting process just exposes your organization to more errors. It is only a matter of time before rampant version control sticks its ugly nose into your strategic plan.

The ClearPoint Data Loader was designed to eliminate this problem. By leveraging the ClearPoint REST API, the Data Loader connects your data sources to your quantitative elements in ClearPoint. The Data Loader can handle both XLS and CSV files as well as any database that can be SQL queried. The single-click requirement to upload data means no more scrambling for numbers at the last second before that big quarterly review meeting. No more digging

for data—everything is always one click away from being up to date. In addition to being fast, the Data Loader is secure. The application is installed locally, behind your organization’s firewall. As a result, tapping into your data sources is easy, safe, and secure. Shared files in shared locations? No problem. All those hours spent manually entering data can be yours again. It is time to get back to executing on your strategic plan. The ClearPoint Data Loader makes that possible.

Learn how current clients leverage the Data Loader with [these stories](#). From a series of regularly scheduled uploads that access 24 department files in shared folders,

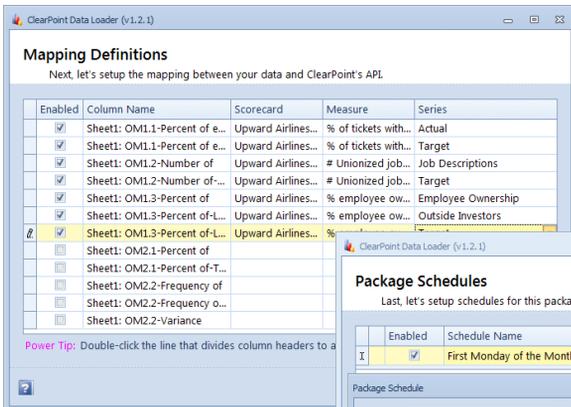
to a Data Loader stored on a central server that taps into multiple city ERP systems, ClearPoint administrators are finding ways to make their entire reporting process simpler thanks to the Data Loader.



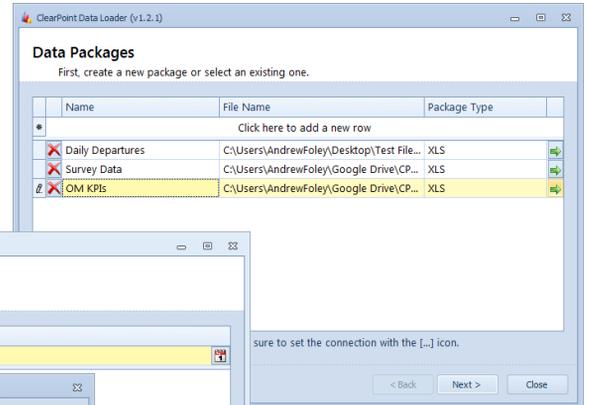
The Data Loader is included in the ClearPoint subscription package and is available for use by any active user with Updater or above privileges. Just email a member of the ClearPoint support team at support@clearpointstrategy.com for a link to download the tool. Installation takes less than five minutes and logging in requires nothing more than your ClearPoint username and password. The Data Loader provides step by step instructions for mapping your data sources to their destinations in ClearPoint, so setup is a

breeze. Once the mappings are all defined, uploading via the Data Loader takes only a single click of the “upload” button. Not in the office when your measures need updating for the leadership team’s big meeting? Scheduled uploads are easy to setup and tell the data loader when to run your spreadsheets or queries all on its own. Don’t worry, with each upload comes a notification email informing you of which series were updated. You will know immediately when your measures are up to date. Happy Reporting!

1) Map the package once



2) Upload with one click



3) Set schedules to run packages automatically

Want to learn more?

Check out our webinar on the Data Loader to see it in action: <https://goo.gl/ld0V3> or email our support team at support@clearpointstrategy.com to get your hands on the tool!