

ClearPoint Strategy

ClearPoint Data Loader

Configuration and Usage Guide

Version 1.2.1

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ClearPoint Data Loader

Overview

What is it?

The ClearPoint Data Loader is a tool that helps organizations rapidly load measure data into ClearPoint. The Data Loader accepts XLS, CSV, and SQL files. The Data Loader is a Windows application that is installed on a client workstation or server and pushes data from the client location to the ClearPoint REST API over secure SSL/TLS. In addition to uploading on demand, the Data Loader allows for unattended scheduled uploads.

Benefits

The Data Loader has several benefits for organizations that are using ClearPoint to help create their management reports:

- The Data Loader accepts XLS, CSV, and SQL files, allowing you to quickly and easily aggregate data from across your organization.
- No firewall configuration is required since the Data Loader securely pushes data from your environment to ClearPoint over SSL/TLS.
- Users of the Data Loader are subject to the same user permissions and audit logging as interactive users, so administrator access is not required to load data.
- Mappings only need to be created once in the Data Loader and can then be re-used each for each monthly (or whatever the frequency is) update.
- A flexible scheduling engine ensures that the data is uploaded daily, weekly, monthly, or whatever frequency meets your reporting requirements.

How does it work?

There are a few simple steps to using the Data Loader:

- 1) Define the source file (XLS, CSV, or SQL Query)
- 2) In case of a SQL Query, define the data connection
- 3) Select the scorecards that will be used in the mappings
- 4) Define the mappings
- 5) Preview the data
- 6) Define schedules, if required
- 7) Run the package

The mappings are saved in a “package” file that can be re-used. This “package” file is stored on ClearPoint’s secure server, so if you get a new laptop or workstation, you just need to reinstall the Data Loader and your mappings are safe.

Installing and Starting the Data Loader

To install the Data Loader, download the installation package from ClearPoint. The installation package will check requirements and download and install necessary prerequisites.

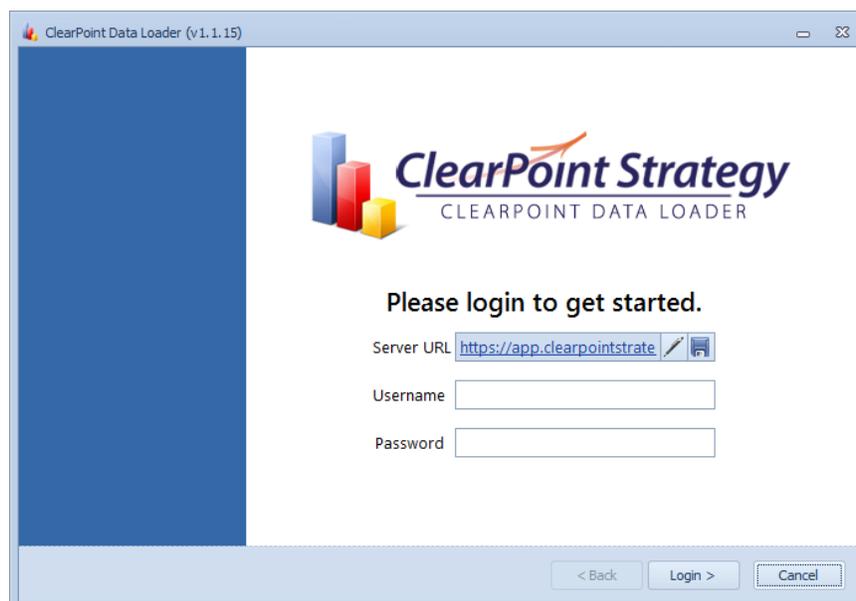
The prerequisites for the Data Loader include the most recent .Net Framework. If you don’t have it installed, the Data Loader will prompt you to download and install .Net. The Data Loader can run on Windows 7 and above computers and may require administrative rights to install, depending on your local security requirements. If you have questions about installing the Data Loader, contact your organization’s IT department or support@clearpointstrategy.com.

Once the install is complete, the Data Loader will be added to your Start Menu and a shortcut will be placed on your desktop. To use the Data Loader, click on the “ClearPoint Data Loader” icon on your desktop. This will launch the login window.

Using the Data Loader

Login

At the login window, enter your ClearPoint username and password. This is the same username and password that you use to log into the system online. Once you’ve entered your username and password, click “Login.”



ClearPoint Data Loader (v1.1.15)

 CLEARPOINT DATA LOADER

Please login to get started.

Server URL

Username

Password

< Back Login > Cancel

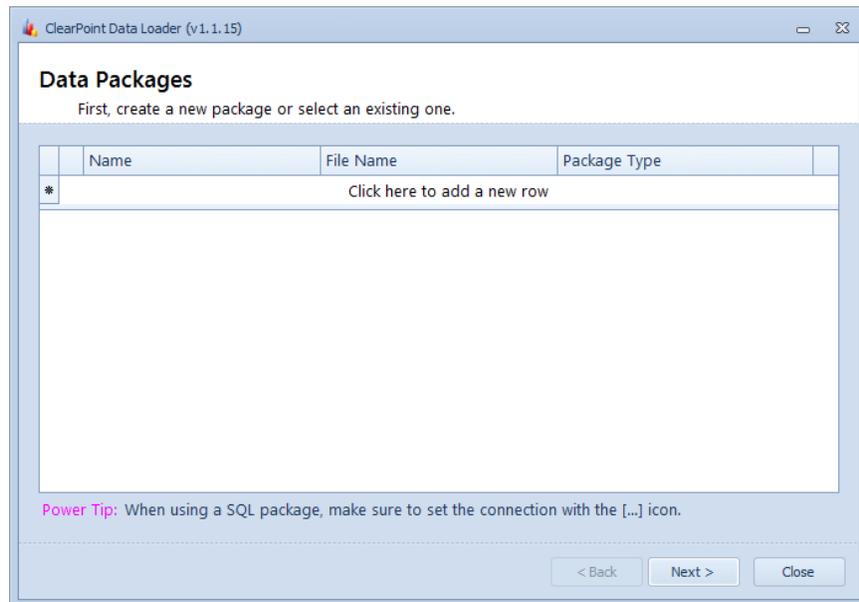
Please note: You'll see the option to set the "Server URL" on the login screen. This is only required if you have an on-premise installation of ClearPoint or if you have a dedicated instance that does not use the default URL. Most organizations can just leave this set to the default. If you do change your server URL, you will need to restart the service in order to have the scheduler recognize the new URL and post files automatically. For more information about this, please contact ClearPoint Support at support@clearpointstrategy.com.

Data Packages

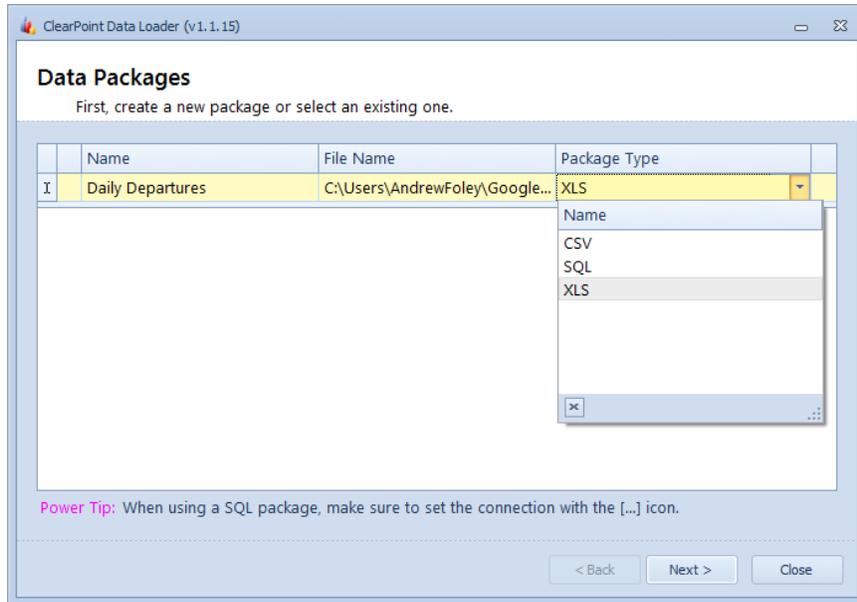
After logging in, you will be presented with the "Data Packages" screen. A "package" is a stored set of mappings between a source file and a set of measures in ClearPoint. By defining packages, you can set up mappings one time, then quickly re-use these mappings in the future to load data into ClearPoint.

If you have uploaded Excel files in ClearPoint before, please note that this process is a little different. Instead of creating a "virtual scorecard" in ClearPoint that you can use in calculations, the Data Loader directly inserts data into measure data tables. In this way, it's much more analogous to the Text File upload, however the hard work of mapping to measures and measure series is done by the Data Loader.

If this is your first time using the Data Loader, no packages will be listed on this screen. Creating a new package is simple. You click on the row labeled "Click here to add a new row" and enter the name of the package you would like to create, the file path to the source file, and the package type.

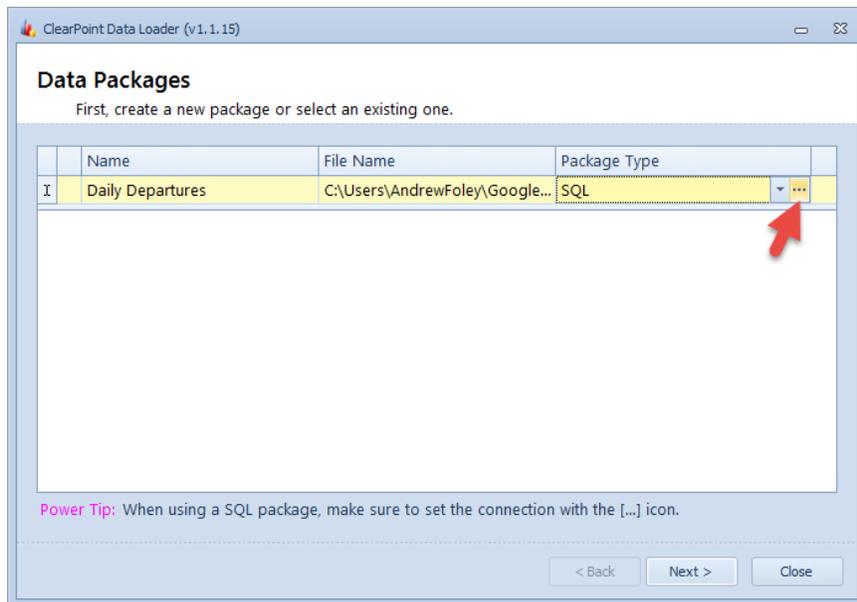


Please note that the package type will usually be selected automatically for you based on the file extension of the source file (e.g., test.csv will be a CSV file, test.xls(s) will select Excel, and test.sql will be a SQL script).

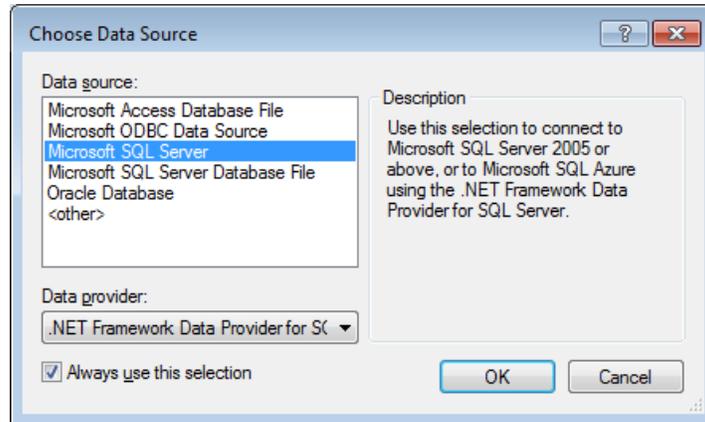


SQL Connection Configuration

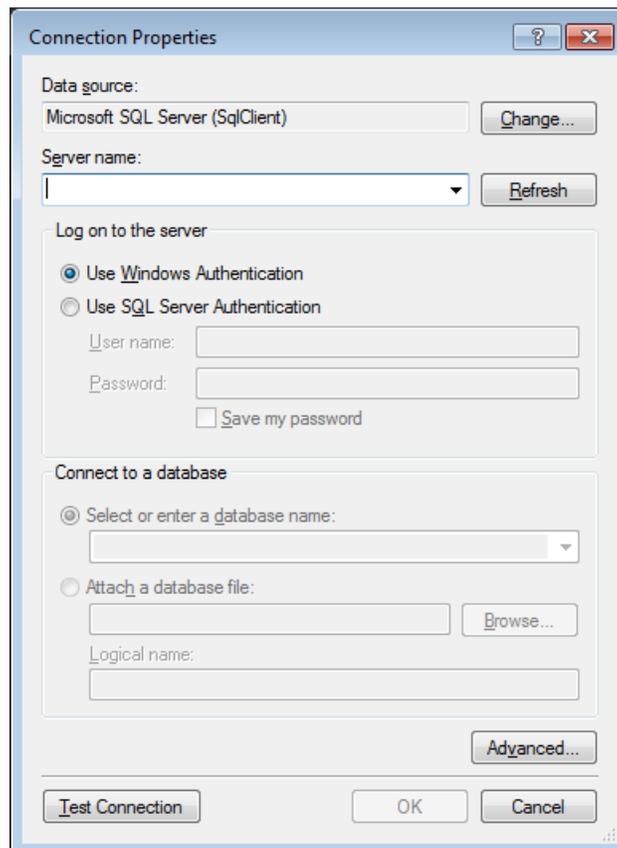
If you are configuring a SQL script as the source file, there are a few more steps that you must complete in order to set up the data connection for this package. This includes the data source type (SQL Server, Oracle Database, Microsoft Access Data File, etc.) To launch the SQL Connection Wizard, click on the ellipsis (...) to the right of the data source dropdown (it will only be visible if you've selected SQL as a data source.)



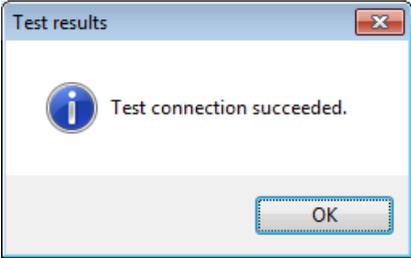
Once you click on the ellipsis, it will launch the SQL Connection Wizard. The wizard will display a file like the one below. For the purposes of this overview, we will use Microsoft SQL Server. Select the data source and click “OK.”



Once the data source has been selected, you will need to configure the connection to the data source. Shown below is the data source configuration screen. Please note that this will vary depending on your data source. If you need more information on configuring data sources, please contact your internal IT Support department or contact ClearPoint Support at support@clearpointstrategy.com.



After configuring the data source, click on “Test Connection” to validate the connection is active. You should receive an alert box like the one below that confirms your connection is working.

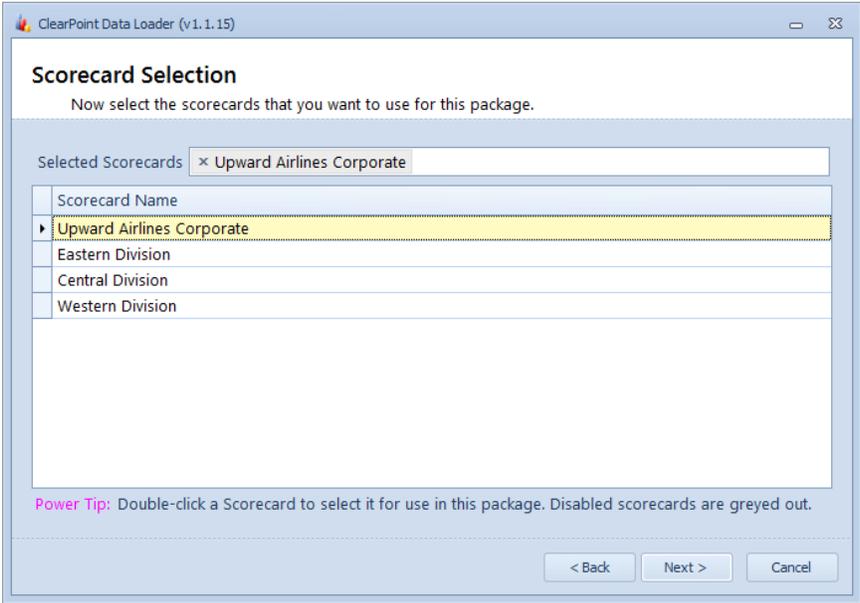


Click “OK” and you will be returned to the Data Packages screen.

Scorecard Selection

From the Data Packages screen, click “Next” to begin configuring the mappings from the source data to the scorecards in ClearPoint. At the “Scorecard Selection” screen, double-click on the scorecards that you would like to use in the package.

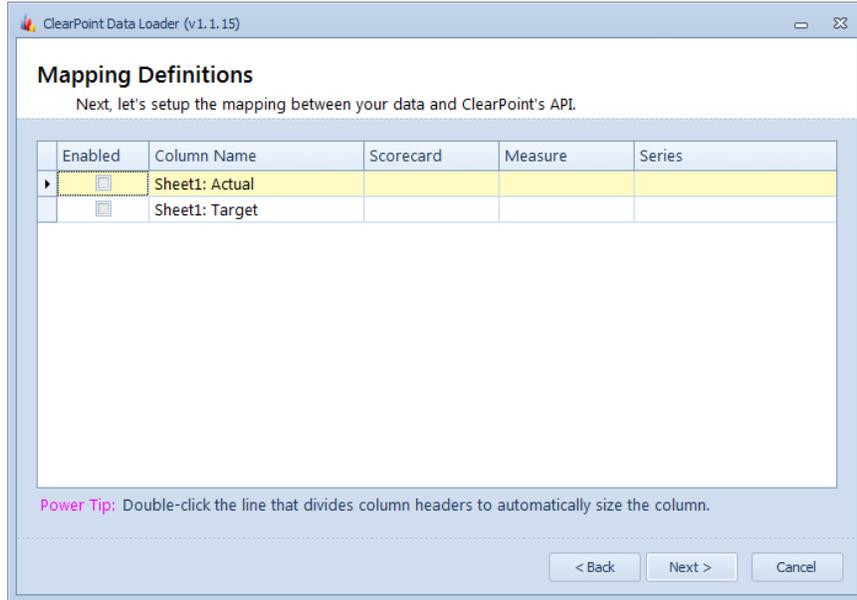
The list of scorecards displayed in this list depends on the permissions your user has. So, for example, you can have the finance team use this application to upload data for finance measures, and you can have the operations team use this application to upload data for the operations team. This is an improvement over uploading Excel files directly to ClearPoint as administrative rights are not needed for these file uploads (just updater permissions or above).



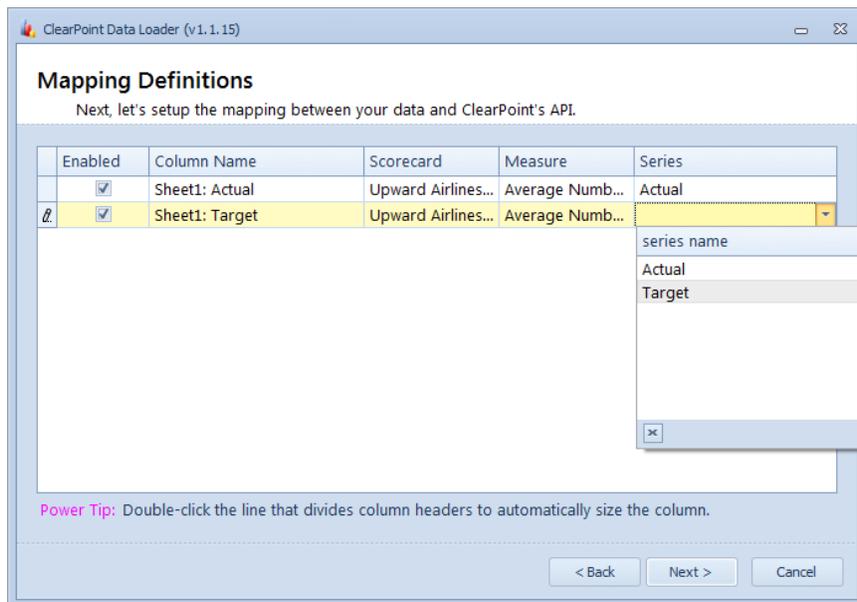
You can remove a scorecard from the package by clicking on the “x” to the left of the scorecard name once it’s been selected. Disabled (locked) scorecards are greyed out in this list.

Mapping Definitions

Once you have selected all the scorecards that you will be using in this package, click “Next” to go to the “Mapping Definitions” screen. This screen is the core of the package definition and allows you to map columns in the source file (labeled “source column”) on the screen to the scorecard, measure, and measure series in ClearPoint.



You must first check the box to enable the source column, then select the scorecard, then the measure, then the measure series for the mapping.



Preview Data

Once the mappings are complete, click “next” to get to the “Preview Data” panel. From this panel, you can see what data will be sent to ClearPoint. The reporting periods in the tool are displayed on the left, and the data is shown in the column(s) to the right.

Mouse over any cell in the preview to get an explanation of the status of the cell. The hint text will show the old value (in ClearPoint), the new value (in the source file), and the status and/or error message.

The Data Loader previews the data using the following color codes:

- Unchanged data is not highlighted. Nothing will be sent to ClearPoint.
- Changed data is highlighted in green. These values will be sent to ClearPoint
- Invalid data is highlighted in red. These data will not be sent to ClearPoint
- Locked series, periods, or scorecards are highlighted in grey. These data will not be sent to ClearPoint

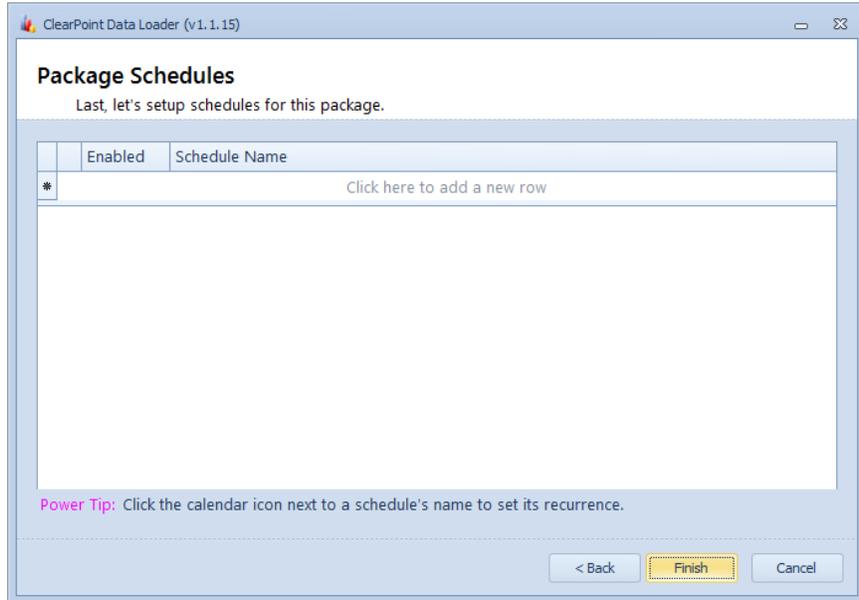
Periods	Sheet1: Actual (Act...	Sheet1: Target (Tar...
Q1-2014	6.5	7
Q2-2014	6.6	7
Q3-2014	6.9	7
Q4-2014	7.1	7
Q1-2015	7.7	8
Q2-2015		8
Q3-2015		8
Q4-2015		8

Review the data on this screen. If it does not look correct, click “Back” to return to the previous screens to correct your mappings.

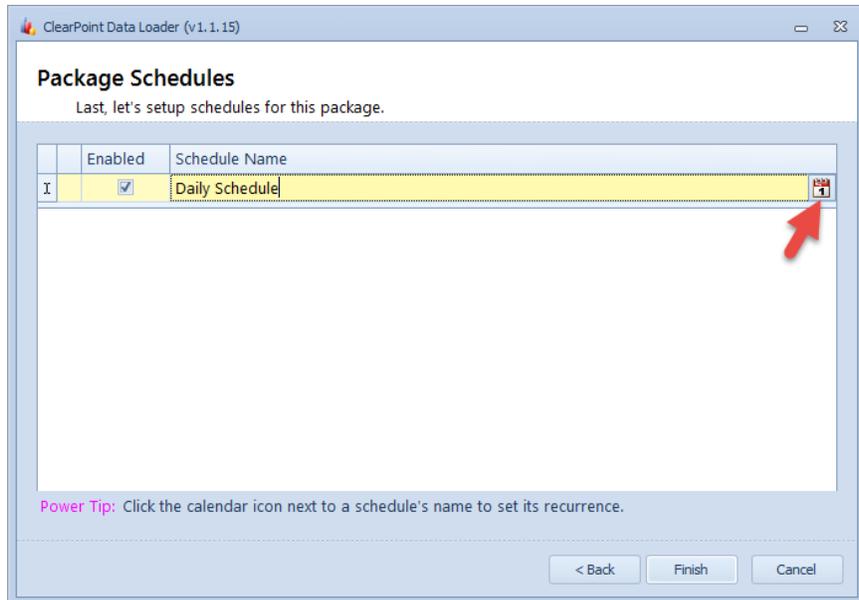
Schedules

Once your data look correct on the preview screen, it’s time to add schedules to determine when this package will run. (If you’re not interested in scheduling this package, you can simply click “Finish” to return to the list of packages.)

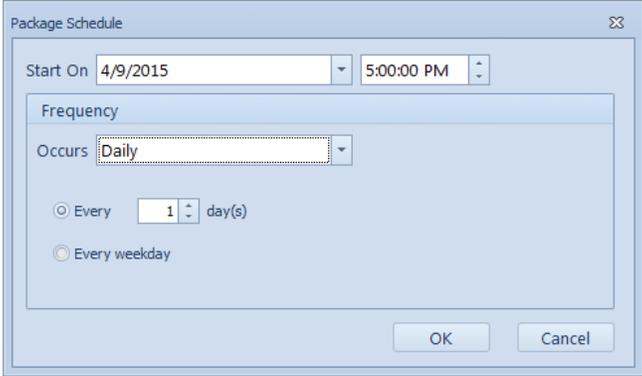
To add a schedule, click on the first row (labeled “Click here to add a new row.”) Enter the name of the schedule, and click to enable it:



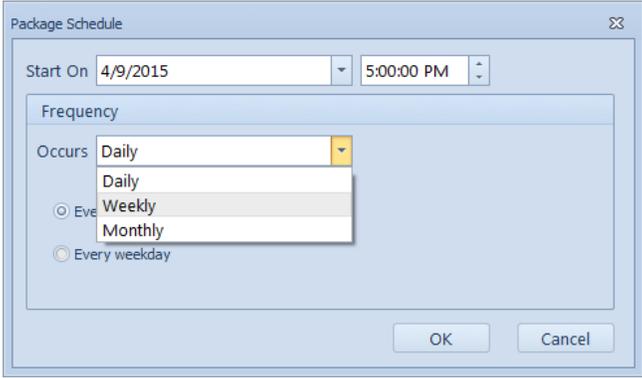
You'll then need to set up the recurrence for this schedule. To do so, click on the little calendar icon to the right of the schedule name. This will bring up the scheduler dialog box. In the scheduler dialog box, you can set the recurrence pattern for the this package.



Schedules can run daily, weekly, or monthly, and are based on the start date of the schedule. For example, a daily schedule that starts on 1/15/2015 at 5:00pm would repeat every day at 5pm.



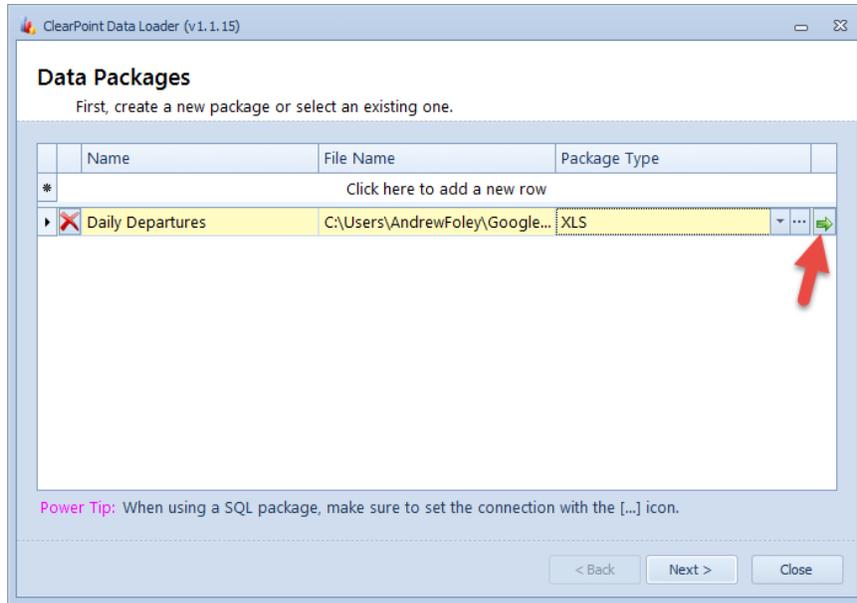
You can set up daily, weekly, or monthly schedules, and choose whether these schedules run on weekdays, specific days of the month, the first weekday of the month, etc., etc. etc. You can also have multiple schedules, which will allow you to have a package run at different times for different months or even multiple times per day.



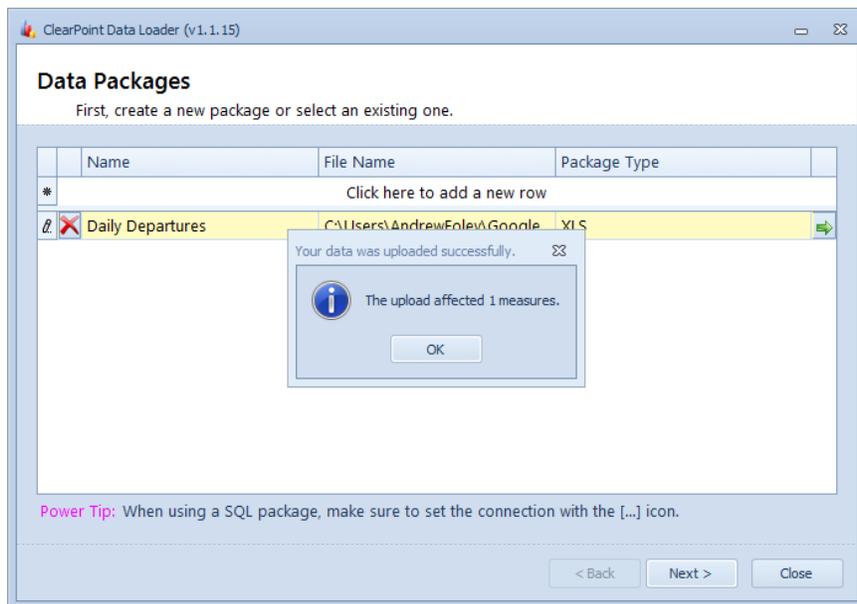
Once you've defined all of your schedules, click "Finish" to return to the list of packages.

Running Packages

From the list of packages, you can quickly run packages that you've already defined. Just click on the green arrow to the right of the package name. After confirming that you do indeed want to run the package, the system will either upload the XLS or CSV file or run the SQL query and post the data to ClearPoint.



Once complete, you will receive a notification on screen that the data upload was successful, plus an email listing the measure impacted.



Please note that more measures than those included in the upload may have been impacted by the upload due to calculations. For example, if the upload impacts a revenue measure, and there is another measure that calculates profitability based on revenue, both the revenue and the profitability measure will be impacted.

From this screen, you can also run the package again, edit the package, or delete the package (by clicking on the row and pressing “delete.”) You can also exit the Data Loader by pressing “Cancel.”

Configuring Source Files for the Data Loader

The Data Loader expects source files (be they XLS, CSV, or SQL files) in a certain format. Typically, the period name should be the first column to the left, labeled "Period". The series names should be listed in the first row. XLS sheets can contain multiple worksheets, however, the sheets should follow the same format in order to be uploaded to ClearPoint. Below is an example of the data source:

Period	Bridal Paths	Sidewalks	Paved Streets	Unpaved Streets
Jul-10	80.67	124.17	251.79	27.44
Aug-10	80.67	125.42	254.33	27.44
Sep-10	81.49	125.42	254.33	27.72
Oct-10	82.31	125.42	254.33	28.00
Nov-10	83.14	127.98	259.52	28.00
Dec-10	83.98	130.59	259.52	28.28

SQL files should be structured in a similar fashion to allow upload into ClearPoint. Below is an example of a SQL script that formats data (from the AdventureWorks2008R2 database) into a format that can be easily read by the Data Loader:

```
SELECT REPLACE(RIGHT(CONVERT(VARCHAR(9), MAX(orderDate), 6), 6), ' ', '-') AS Period ,
COUNT(TotalDue) AS NumberSales ,
SUM(TotalDue) AS TotalSales
FROM Sales.SalesOrderHeader
GROUP BY YEAR(orderDate) ,
MONTH(orderDate)
ORDER BY YEAR(orderDate) ,
MONTH(orderDate)
```

The Data Loader will accept the period name, the period alias (if period groups are used for custom periodicity), or the period date. Please note that if your data file contains multiple rows with the same period name or date, only the last row will be saved in ClearPoint.

If you have questions on how best to format your source files for use in the Data Loader, please contact ClearPoint Support at support@clearpointstrategy.com.