

Right First Time Data Capture with Clavis Data Steward and Microsoft Office

Clavis Data Steward™ Benefits

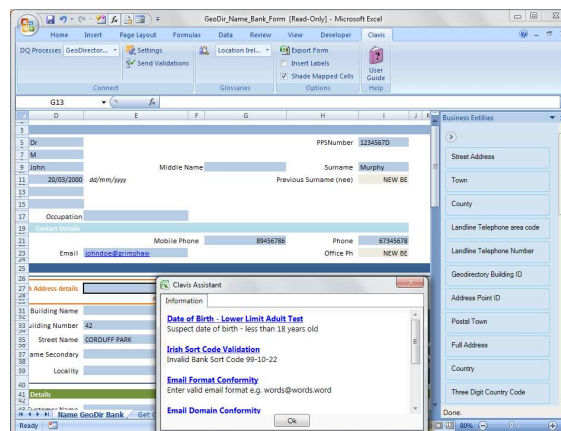
- Extends MS Office functionality to incorporate data quality checks in documents
- Provides Libraries of standard data validations
- Works with existing data collection forms and processes
- Ensures data is captured “right first time” in Word and Excel forms, and removes the need rechecking.
- Rapid and Universal Deployment
- Scales to Meet Needs, Where and When it’s Needed
- Predictable Subscription-based Pricing

As organizations move away from paper-based data capture processes to more automated approaches Microsoft Office products, such as MS Word and Excel, are playing a central role in data collection and data quality. Because of the ease with which business users can create and edit relatively complex forms using Word and Excel, these two products have become the obvious choice for establishing electronic data capture processes even in very large organizations.

Data Collection & Data Quality

Form templates for vendor or customer setup, employee expenses, purchase orders and invoices are created in Microsoft Office applications in an effort to streamline and standardize data collection processes. Getting the data into a form is just the first step in ensuring your organization has effective data collection processes, the bigger challenge is to ensure that the data captured is complete and error-free.

High quality data, delivered on time, is the primary goal of most organizations as they move from manual to electronic data capture. However, cost-effectively capturing complete, error free data from dispersed data providers remains a challenge. Limited time, limited knowledge, limited motivation and data access barriers will continue to contribute to poor outcomes, requiring manual data checking, re-keying and time-consuming “review and revert” cycles to get the data to a high enough standard.



Clavis FormBuilder for Excel provides point & click access to libraries of data validations and lookups, to verify data quality in real-time as data is entered

Right First Time Data Quality

The key to achieving the full benefits of electronic data collection and capture is to remove the need for so much checking and rechecking by ensuring that data is captured "right first time". But to consistently achieve high quality data requires providing the sort of real-time help and assistance to users as they enter data into forms and documents, which is beyond the capabilities Word and Excel. To be effective the data capture application need to be able to:

- Flag errors, inconsistencies, or missing data
- Provide guidance, hints and suggestions
- Auto-fill fields
- Dynamically provide dropdown lists
- Apply rules based on specific context
- Enable data capture personnel to ask questions and collaborate with subject matter experts

Extending MS Office

Some organizations have turned to their IT departments to build customized data capture applications, such as web portals, to provide the sort of capabilities outlined above, but this has cut business users out of the process and raises even more problems and limitations. The primary reason for the dominance of MS Office in the data collection process is the ease with which business users can create and edit relatively complex forms using Word and Excel. There is a growing recognition that the given the ever-changing nature of data capture requirements, and the number and diversity of processes, the only viable approach is to allow business owners to leverage the tools which they are most familiar with: MS Excel and Word.

Despite the prevalence of these products in data collect, neither Word nor Excel were designed with data collection in mind, and as such can't provide all of the necessary functionality without some help. Each data capture form built in Excel or Word is effectively standalone. Maintaining rules used across multiple forms can be a challenge and the forms will have limited capabilities in terms of validation without reverting to coding or macros and it can be difficult to provide users with standards and libraries of rules that could be used across the board.

Clavis Technology provides a highly innovative solution to enable business users to deploy best-in-class data quality controls, rules and reference data within data collection processes based on standard Microsoft Office products. Clavis Data Steward combines the advantages that can be achieved by having a single web portal for data capture, with the ease and convenience of keeping your MS Office-based data collection forms.

Clavis Data Steward

Clavis Data Steward is a unique, cloud based service that consists of:

- Libraries of industry standard data validations and lookups (reference lists) for all common data attributes which can be easily associated with to Microsoft Office applications – such as Excel, Word, InfoPath and Silverlight. Once connected to a data capture form within a collection process, Clavis Data Steward provides real-time data quality monitoring delivering error messages, hints, suggestions and auto-insertions to assist the user entering data.
- An easy-to-use interface to enable users to build and

manage libraries of customized data validations and manage these over time. This means that:

1. Changes to rules or lookups which exist in multiple forms can be made in one place
2. There is no need to release new versions of forms when validations/lookups change as all validation logic is contained with is Clavis Data Steward.

- The ability to manage and maintain reference lists to support populating drop down or selection lists from one central location. Reference lists can be sent from other applications to Clavis Data Steward very easily.
- Central reporting and monitoring to provide a consolidated view of errors across all data collection forms – and tracking of sources of repeat errors available to the people responsible for the collection process , individual subject matter experts or data stewards responsible for specific rules or business entities.
- Clavis is a Software as a Service (SaaS) solution hosted in the cloud – so it doesn't matter whether excel/word forms are being completed by data providers inside or outside the organization.

By leveraging Clavis organizations can enable their business users to setup and manage best-in-class data capture processes leveraging the MS Office products they already use every day.,

About Clavis Technology

Clavis Technology is a leading provider of Operational Data Quality and Data Quality Governance solutions. Delivered in the cloud as Software as a Service (SaaS) the Clavis Data Steward enables organizations to get their data 'right first time', and therefore to reap the benefits of high quality data throughout the enterprise for longer. The SaaS solution facilitates easy access and collaboration by the widest group of Data Quality stakeholders within and outside the enterprise.

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Clavis Data Steward in Action

Background

The finance manager in a medium sized organization has developed a number of form templates for capturing data on new vendors – the goal is to provide a standardized method for employees across the organization to collect all the data required to setup a new vendor object in the firm's financial system. A number of different forms are required as different data must be collected depending on the size of the vendor contract and the country where the vendor is based. The form templates have been developed in Microsoft Excel.

Challenge

Up to now all forms have been manually reviewed and rekeyed into the finance system by the data administration staff. To improve efficiency and reduce costs, the finance manager wants to move to an automated process, whereby the data from the Excel form is automatically loaded into his financial system. From a technical point of view this can easily be done. However there is one major hurdle – Data Quality. Most of the costs and delays associated with the process are caused by data errors and omissions in the forms. This is corrected via a time consuming and costly "review and revert" process where all the data in each form is reviewed and cross-checked, and when errors are found, the form is returned to the originator for correction

Solution

Clavis Data Steward provides the solution to the finance manager's problems:

- Using the Clavis Form Builder for Excel, all of the fields in the vendor setup forms are easily mapped to Clavis' Data Quality Glossaries. This means that as a user enters data in Excel, Clavis provides real-time feedback and assistance to the user in the form of, error messages, auto-insert of data, suggestions and hints, and check-on-save function to ensure all fields are completed correctly.
- Many of the data rules required to provide this feedback are already available as standard Clavis Glossaries. In addition, the finance manager's team can easily add their own customized libraries of validations and lookups in Clavis to apply controls specific to their organization.
- Once the form fields have been "mapped" to Clavis the forms can be sent to any person inside or outside the organization. The forms look exactly as before, but have extended functionality including real-time assistance provided by Clavis Data Steward to ensure that the form is completed correctly first time round.
- Clavis provides reports on the quality of data submitted by each individual and details of all rules passed and failed. This removes the need for the finance team to inspect each form individually prior to auto-loading. Instead they can pinpoint forms with data issues and focus on reviewing these.

Benefits

Implementing Clavis has hugely reduced the time and effort required to review and correct vendor setup forms – leading to direct cost savings for the finance manager.