

Cirrus Data Import Checker

Case Study: “Improving New Client Mobilisation”

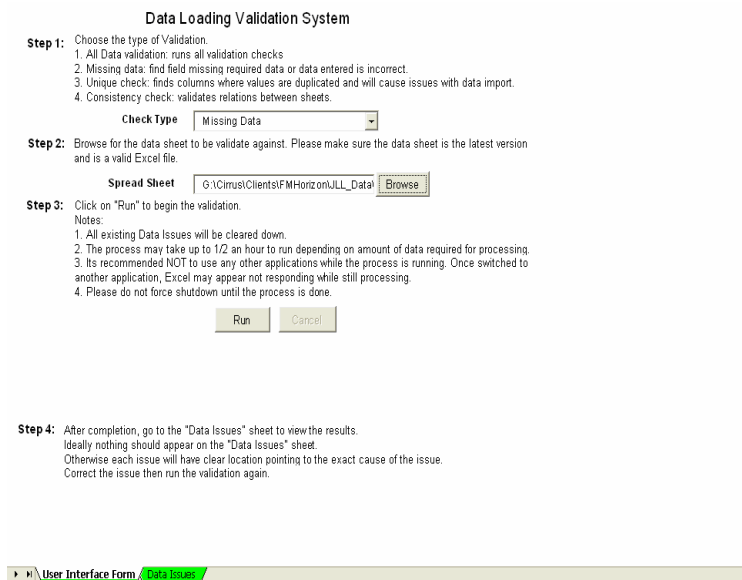
“This Data Import Checker is a valuable tool in that it will greatly reduce our administration time when mobilising new clients”

Dominick Kelly, General Manager, FM24.

Background

FM24 is an independent FM specialist, working with a variety of in-house and contract facilities teams, covering nearly 2000 locations throughout the UK. Cirrus Software provides FM24 with the fmHorizon helpdesk which manages maintenance issues for their clients.

Cirrus Data Import Checker (User Interface Form)...



Data Loading Validation System

Step 1: Choose the type of Validation.
 1. All Data validation: runs all validation checks
 2. Missing data: find field missing required data or data entered is incorrect.
 3. Unique check: finds columns where values are duplicated and will cause issues with data import.
 4. Consistency check: validates relations between sheets.

Check Type:

Step 2: Browse for the data sheet to be validate against. Please make sure the data sheet is the latest version and is a valid Excel file

Spread Sheet:

Step 3: Click on "Run" to begin the validation.
 Notes:
 1. All existing Data Issues will be cleared down.
 2. The process may take up to 1/2 an hour to run depending on amount of data required for processing.
 3. Its recommended NOT to use any other applications while the process is running. Once switched to another application, Excel may appear not responding while still processing.
 4. Please do not force shutdown until the process is done.

Step 4: After completion, go to the "Data Issues" sheet to view the results.
 Ideally nothing should appear on the "Data Issues" sheet.
 Otherwise each issue will have clear location pointing to the exact cause of the issue.
 Correct the issue then run the validation again.

Taskbar: User Interface Form / Data Issues

The Challenge

When a new client employs FM24 to manage their maintenance then a new set of data records must be created these include: building addresses, company employees, contractors details and general data.

This data is usually supplied in a spreadsheet and inevitably contains numerous data inaccuracies which can lead to many man hours changing, modifying and resending the data back and forth to FM24, until it meets the correct standard for loading onto the database.

The Solution

The Cirrus Data Import Checker is a spreadsheet based application that will increase the efficiency of mass data loading and in FM24’s case it will speed up the data checking process of new data during the mobilisation of a new client.

The Data Checker works by scrolling through all of FM24’s imported data, checking the rows and columns against the data types and values defined by Cirrus Software for each data ‘Check Type’.

The Cirrus Data Import Checker is made up of two worksheets the ‘User Interface Form’ (shown above) and the ‘Data Issues’ (shown overleaf), FM24’s administrators will interact with these worksheets.

The ‘User Interface Form’ allows the users to select the data ‘Check Type’ to be carried out from the drop down menu i.e. ‘All Data Checks’, ‘Missing Data’, ‘Consistency Checks’ and ‘Unique

Values'. The user then selects the browse button to locate the spreadsheet to be imported (data checked) and then finally they select the run button to start the process.

The 'Data Issues' worksheet is where all the returned data errors are logged, this allows the users to scroll through the errors (showing the: check type, sheet name, column names, row numbers severity and a brief error description) and then the user can amend the data from the imported spreadsheet accordingly before rerunning the Cirrus Data Import Checker to reaffirm the error has been rectified.

Cirrus Software Data Import Checker (Data Issues)

check type	Sheet Name	Column Name	Row Number	severity	data Issue Description
Unique Checks	Contractor	Contractor Name	23	1	This row is not unique, colliding with row 3
Unique Checks	Contractor	Contractor Name	24	1	This row is not unique, colliding with row 4
Unique Checks	Contractor	Contractor Name	25	1	This row is not unique, colliding with row 5
Unique Checks	Contractor	Contractor Name	26	1	This row is not unique, colliding with row 6
Unique Checks	Contractor	Contractor Name	27	1	This row is not unique, colliding with row 7
Unique Checks	Contractor	Contractor Name	28	1	This row is not unique, colliding with row 8
Unique Checks	Contractor	Contractor Name	29	1	This row is not unique, colliding with row 9
Unique Checks	Contractor	Contractor Name	30	1	This row is not unique, colliding with row 10
Unique Checks	Contractor	Contractor Name	31	1	This row is not unique, colliding with row 11
Unique Checks	Contractor	Contractor Name	32	1	This row is not unique, colliding with row 12

The Solution Results

When the Cirrus Data Import Checker was run using FM24's imported spreadsheet the following data errors were logged: inconsistent company names (spelling errors), missing data (blank columns where data was specified), inconsistent data values (where text was specified, but a numeric was entered), data specified but not used (i.e. a contractor did not have any data linked to them), fax numbers were entered as mobile numbers (error checking that fax numbers do not begin with '07' mobile code).

All of these errors were populated onto the 'Data Issues' spreadsheet this then allowed the user to go and rectify the errors from the imported FM24 spreadsheet.

Outstanding Benefits

FM24 can now manage and validate their own data before sending it to Cirrus by processing all their spreadsheets through the Cirrus Data Import Checker and amending any logged errors.

The main benefits of the Cirrus Data Import Checker are:

- It checks to see if the imported worksheet is a valid one: correct tabs, is an excel file.
- Checks for missing data: no blank rows or columns unless specified.
- Checks the consistency of the data: the data type is a specified for the row/column; are there any spelling mistakes, redundant data.
- Checks for unique values: data from one column must be the same as specified for other rows/columns (primary/foreign keys).

This will greatly reduce administration time and prevent duplicate or corrupt data being loaded onto the Database.

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