Compyle

Data Deduplication Tools Upgrade

May 2023

Introduction & Welcome

Thank you to our customers, beta users, & staff who have all provided feedback that we are using to make Compyle even better.

Please send future feature suggestions to the Compyle, Control, & Scorecard support team at support@clearimpact.com.
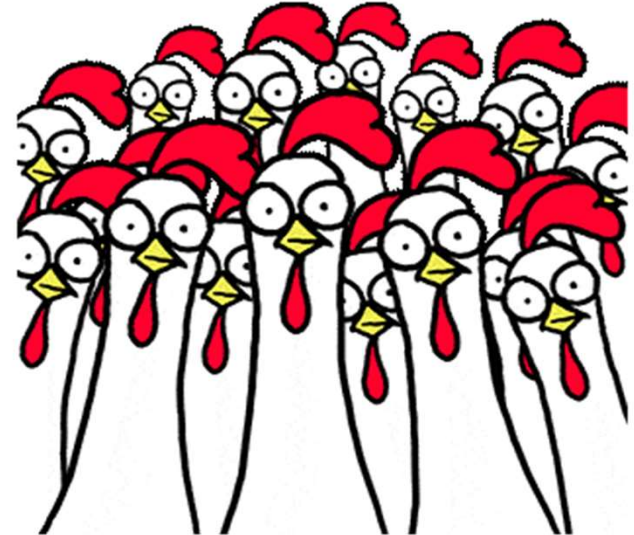
Agenda: Upgrade Overview

- **Introduction: Tools for Cleaner Data**
  - Prevention at data entry
  - Remediation for existing duplicates

- **Duplicate Check**
  - Participant and Organization forms
  - Creating and updating records
  - Import &Public forms

- **Manage & Merge Duplicates**
  - Search for Duplicates custom report
  - Compare & Merge
  - Pending Records

- **Survey & Data Forms Improvements**
  - Instance Timeframe Management
  - Email Reminders improvements
  - Anonymous Surveys better
  - Question Fields

- **Assorted Refinements**
  - Data Entry
  - Search filters
  - Multi-site navigation
  - Security improvements

- **Conclusion**

- **Questions & Answers**

Our Approach

Prevention: Duplicate check helps reduce duplicates going in by looking for duplicates for new records and record edits.

Remediation: Manage duplicates lets you clean up the existing duplicates that may have already snuck in.

Duplicate Check

Participant & Organization Forms

1) Duplicate check is an optional form setting
    a) Choose up to 5 fields to Check
    b) Compares for an exact match
    c) Easy to change

2) Data Entry
    a) New records: duplicate check is required before users can save
    b) Existing records: duplicate check is an option
    c) Save button displays at top and bottom of Participant & Organization form
    d) If duplicate found, option to switch to that record
    e) Group level access to participants & organizations enforced (restricted record exists message)

Benefits: Prevent users accidentally duplicating participants or organizations. Adjust which fields are compared until you find the right fit for your staff.

Duplicate Check & Other Areas

1) Import
   a) Designated duplicate check fields are used to identify duplicates between the new records and existing records
   b) Have the option to ignore duplicates and make an exception
   c) Turning off duplicate check for the Participant or Organization form resets the import duplicate check to participant email or organization name

2) Public forms
   a) option to enable duplicate check
   b) skipped by default for confidentiality reasons

Benefits: Prevent users accidentally duplicating participants or organizations through imports. Determine when public forms should indicate there is a duplicate.

Manage & Merge Duplicates

Manage Duplicates

- Manage Duplicates Custom Report

  - Defaults to current duplicate check fields but can be changed

  - Ability to identify duplicates based on matches to up to 5 fields

  - Potential matches include all fields being compared

- Compare & Merge

  - Select 1 or more records to review side by side

  - Determine which single record to keep

  - Confirm, review, and merge, which transfers all surveys, notes, and attached documents to kept record

  - Cannot be reversed

Benefit: Easily combine duplicate records into a single full participant record at once. Ability to review and determine if the records are truly for the same entity before merging them.

Pending Records & Merge Duplicates

- Pending Records

  - Automatically checked for duplication based on current duplicate fields

  - Review button replaces Accept button for possible matches

  - Only applies if duplicates are not auto accepted

Benefit: Catch possible duplicates from participants or organizations filling out public forms or submitting survey responses as a new entity. Easily merge those duplicates with the existing record and transfer over any survey response.

Timeframe Management

Survey Instance Timeframe Management
- When you create a new instance, the Time Period Begins date displays for clarity
- Designed to reduce confusion with Fiscal Quarter, Fiscal Half Year, and Fiscal Year data collection frequencies
- Fiscal Year 2023 is the 2022-2023 fiscal year.

Custom Calendar IDs
- Easier to connect Scorecard's custom Reporting Frequencies to Compyle's custom Calendar ID settings
- Admin > Instance settings

Benefit: Reduce confusion when working with fiscal data collection time periods. Make it easier to coordinate information between Scorecard and Compyle.

Email Reminders, Fields, & Anonymous

Email Reminders
- Prevent archived, possibly merged, participants from responding to surveys.
- Improved system messaging when integrated email platform is having technical difficulties

Question Fields
- more consistent numbering
- improved calculation required fields functionality
- hide archived fields on multi-entry form
- simplified read view

Anonymous Surveys
- Removed the participant photo field from Anonymous public forms and the default anonymous public form

Assorted Refinements

Various Improvements

Data Entry
- Save button at top and bottom of Participant and Organization forms
- Better Required Fields warning for Participant and Organization forms

Search filters
- Date filters issue fixed
- Hidden group fields removed

Benefit: Things work better so users are happier and can more easily do what they need to do

Various Improvements Continued

Multi-site navigation
- recently visited sites list

Security improvements
- Server environment updates, internal policies and procedures expanded
- Part of our SOC 2 Type 1 (complete) and SOC 2 Type 2 (in progress) certification process

Benefit: Things work better so users are happier and can more easily do what they need to do in an even more secure environment.
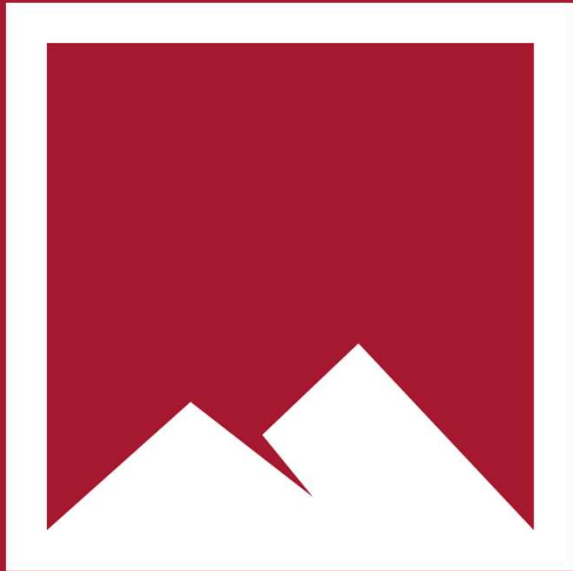
Conclusion

A set of tools for preventing and resolving duplicate records.

Duplicate Check for data entry
Manage Duplicates for data clean up

Q & A

- Any questions?