

# Fast-Class File

Client Data System

## Volume 121: Data Validation

The **Data Validation** tool is a “search and repair” function that verifies and updates information contained in the database.

### Data Validation Recommendations

A complete data validation should be performed –

- At least once a week.
- Before producing reports based on age, policy, or investment values to ensure the values are up-to-date.
- After importing, modifying or deleting large amounts of data.

In addition, should you notice some data irregularities or fields with incorrect values, performing a **Data Validation** can be a quick and easy fix for this type of display problem.

### To perform a Database Validation:

- If operating a network version of CDS, ensure that everyone else has logged out of CDS.
- From the main screen in CDS, select the **Database** menu.
- Select **Complete Data Validation**.
- CDS will open a **Filter Selection** window. Select a filter or set using the appropriate drop down fields to perform a validation on selected data or, to perform a complete system validation, leave all fields blank and click **OK**.
- CDS will open the **Data Validation Options** window.

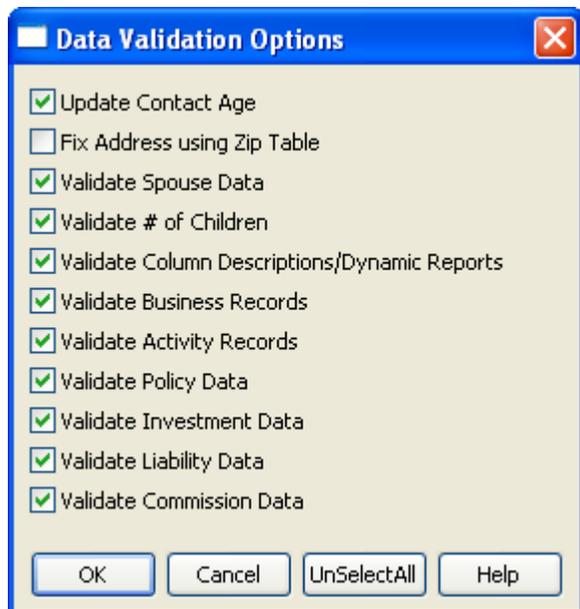


Figure 1: The Data Validation Options window.

- Click the **Select All** button then uncheck the **Fix Address using Zip Table** option.

*NOTE: The **Fix Address using Zip Table** option looks at each contact's city and zip code and compares them to the entries in the city and zip code table provided with the program. If there is a discrepancy in the city name (e.g., incorrect spelling or missing entry), the system will update the city name; however, each time a city name is updated, you will be prompted to post the old address to the SmartPad. If you select this option, someone must sit by the computer to respond to these prompts. For this reason, we do not recommend that you select the **Fix Address using Zip Table** option if you intend to run validation overnight.*

- A series of progress windows will be displayed as the validation progresses.
- Before CDS validates activity records, the **Select activities to be Validated** window will appear.
- Use the options in the **Select activities to be Validated** window to validate only selected activity records or leave all options blank and click **OK** to validate all activity records.
- A final progress window will display indicating the completion of the data validation.
- When the progress window closes, the data validation is complete.