Database Maintenance

There are a number of different utilities built in to CDS that will help to keep your database error free. In this issue we'll discuss two: the **Data Validation** tool and the **Database Rebuild** routine.

Data Validation

The **Data Validation** tool is a "search and repair" function that verifies and updates information contained in the database. If you notice data irregularities or incorrect values after adding, modifying, and/or deleting large amounts of data, you should run a **Data Validation**. We recommend that you perform a **Data Validation** once a week. We especially recommend running a **Data Validation** before producing reports based upon age or policy/investment values to ensure the values are up-to-date. It is also a good idea to validate your data 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.

- Make sure everyone else logs off CDS before performing the validation.
- From the main screen in CDS, select the **Database** menu then select **Data Validation.**
- A **Filter** dialogue box will appear. If you want to validate a specific range of data based on a filter or a set, you can select the filter or set here. To validate all records in the database, leave the fields blank and select **OK**.
- When the **Data Validation Options** dialogue box opens, select the desired validation option(s).

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 indicating the progress of the validation. Depending on the validation option chosen, you may be prompted for additional information. Follow the prompts to continue with the validation. If prompted to choose which activities to validate, leave all the fields blank and select **OK**.

When the progress windows close, you will be returned to the main screen of CDS and the validation will be complete.
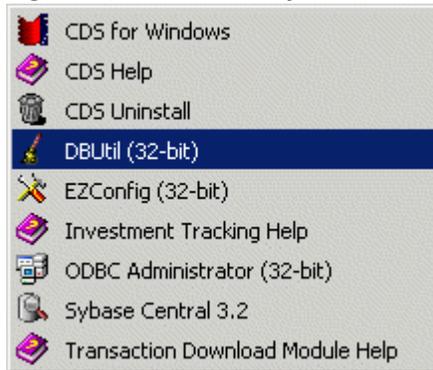
Database Rebuild

A **Database Rebuild** will help maintain the integrity of the indexes where your data is stored. If you think of your database like the stacks of books in a library, the indexes are like the card catalog file. If the card catalog file is well organized, it will be easy to find the book you want. If the card catalog is not well organized, it will be much more difficult to find your book. The book has remained in the same place the whole time; however, the speed at which you can access the book is hampered when the index is in disarray. In essence, a **Database Rebuild** ensures the card catalog file is well indexed so that CDS can find your data quickly and easily.
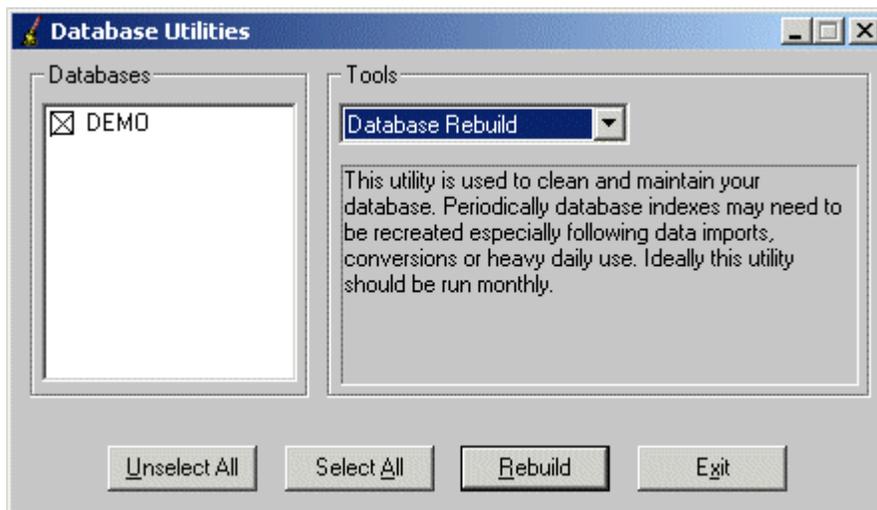
We recommend that you perform a **Database Rebuild** on a monthly basis or after large data imports or conversions. Since a **Database Rebuild** is a fairly involved process that can take a few hours (or more) to run, we recommend that you schedule time to do it after the business day is finished, when no users will need to log in to CDS.

- Before running a **Database Rebuild** make sure you have a current backup of your database.
- Make sure everyone is logged out of CDS before starting a rebuild. A rebuild can be run on the server when a user is in MobileMerge mode; however, if anyone is logged in to the system, serious data corruption can result.
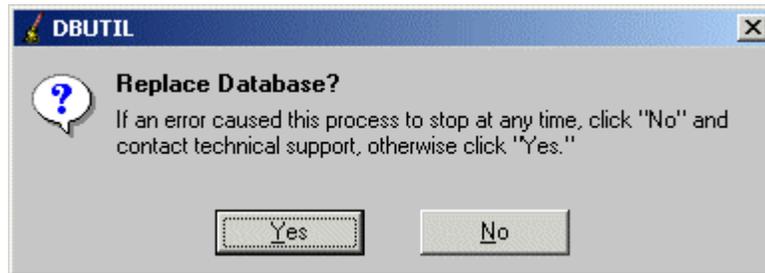
From the **Start** menu, select **Programs, Client Data System, Database Utilities (DBUtil (32-bit))**.

- The **Database Utilities** dialogue box will open. On the left side of the box, you will see a **Databases** window with the name(s) of your database(s). If you have multiple databases, you will see them all in this window. Our example only has the demo database that comes with CDS. By default, all of the databases will be selected. Uncheck the DEMO database by left clicking on the small box to the left of the name DEMO. Leave the rest of your databases selected.

- To the right, you will see a **Tools** box. The pulldown window at the top of the tools box allows you to choose from Backup Database, Database Rebuild, and Database Validate. Select **Database Rebuild**. CDS will begin the process of rebuilding the indexes that house all of your data. This can be a lengthy process depending on the size of your database. We recommend that you schedule a time each week (or month depending on the rebuild frequency) to perform a rebuild when no one will need to get into CDS. A number of our clients choose to run this utility on a Friday after everyone has gone home.
- Once CDS has finished the rebuild, a notice box will appear.

- If there were no errors, select **Yes** and you have successfully completed the **Database Rebuild** routine. If there were any errors, please click **No** and call technical support.

We recommend that you perform a **Data Validation** once a week and use the **Database Rebuild** routine at least once a month to keep your database operations running smoothly. Regular use of these utilities is a great way to keep your database at an optimal level of performance. You may, of course, run either of these utilities any time you choose.

In the next E-Z News: Tools for Customization in CDS.

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