



Client Data System®

v6.0 Progress Guide



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918 E. Green Street
Pasadena, CA 91106

Web: <http://www.ez-data.com>

Telephone: (626) 585-3505

Fax: (626) 440-9097

U.S. toll-free fax: (800) 779-3123



Introduction

The goals of Client Data System version 6 are to refresh the look and feel of the application, to upgrade the technology and to improve the usability of this Proven in Practice application. The workflows and time-tested practices have not been altered, just improved with a modern feel, better versions of our underlying components and an attention to improving the user's overall experience by reducing repetitive clicks and providing more information on each record.

The basic focus points for this new version include:

- Refreshing and Updating Appearance
- Technology Upgrade
- HIPAA Protection
- Improved Module Design
- Keep Proven In Practice Workflows
- Most new features optional



Hardware and Software System Requirements

Minimum/Recommended Hardware for the Server

- **1 GHz Pentium IV processor** (2.2 GHz Pentium IV or higher recommended).
- **512 MB of RAM** (1 GB or higher recommended).
- **2 GB of free hard disk drive space** for initial installation (4 GB recommended). In addition, plan to maintain additional free hard disk space of approximately four times the size of the CDSWIN directory, including all subdirectories, for program upgrades and database rebuilds. This additional space is still required on the C: drive even if the CDSWIN.SVR directory is maintained on a different drive.
- **Microsoft® Windows® XP, Server 2000, or Server 2003** operating system.

Minimum/Recommended Hardware for Workstations or for Single User Installations

- **750 MHz Pentium III processor** (2 GHz or higher recommended).
- **128 MB of RAM** (256 MB or higher recommended).
- **300 MB of free hard disk space.** Workstations that are used for database maintenance procedures should have three times the size of the largest CDS database as free hard disk space on the drive.
- **Microsoft® Windows® XP, Server 2000, or Server 2003** operating system.
- **Microsoft® Word 2000**, or a later version, is required to use MS Word as the default word processor in CDS.
- **Microsoft® Outlook 2003** or a later version, is required for Calendar and E-mail Posting synchronization with CDS.
- **1024x768 screen resolution** for full viewing of the **Pending Case** and **Commission Tracking** Modules.
- Please note that **CDS v6 does not support E-Z Conduit.**



What Users Should Know about CDS v6

While the minimum system requirements listed above specify the requirements for the application, it does not specifically spell out what is no longer supported in v6 – in other words, the things we have dropped support for in the interest of innovating new functionality and superior technology. Here is a list of items that upgrading users should know:

- CDS v6 does not support Windows 95, 98, Me, or NT. These operating systems do not have full support from Microsoft any longer so we cannot effectively support them either.
- CDS v6 requires Windows XP or later. Windows 2000 is not officially supported by E-Z Data, Inc. for Client Data System v6.
- E-Z Conduit is not supported in CDS v6. Existing Conduit users should upgrade to the superior and fully supported E-Z Mobile module if they want to upgrade to v6.
- CDS v6 has moved the Internal Messaging system to the user database instead of the C-Tree to improve performance; however, this means that users can no longer send e-mail between databases. For users who want to communicate between databases, we recommend they use e-mail clients like MS Outlook or Lotus Notes. CDS includes enhancements to allow for better integration with the e-mail clients
- The PCM and CTM modules have been updated to include more information on each tab, which requires a resolution of 1024x768. Running CDS with a lower resolution will make portions of these modules difficult to view.
- The Help System in CDS will be a link to our Help Server, to allow for the latest information to be updated at any time. A static version of the Help Files will remain part of the CDS installation but a user will need to be connected to the Internet to get the latest information on CDS v6.
- Passwords will be required for access to CDS and passwords will expire and need to be changed after forty-five days of use.
- Timed and To Do activities are now distinctly different records for ease of use and to support CDS synchronization with e-mail applications.
- Additional HIPAA requirements to restrict access to HIPAA-protected information in the system. This may involve some more steps in processes such as mass mailings.



Look and Feel Innovations

- The Client Data System color scheme now draws directly from the user's Windows selections.
- The wallpaper for the CDS Desktop can now be easily set to any BMP file the user selects.
- All buttons/icons are all in the same place as before and most retain the original concept of the icon. All feature a newly refreshed look.
- Buttons on the toolbar can be resized to a larger, easier to click format. Small, Medium and Large icons are available.
- Updated menus draw from the Windows XP style with the colors you have selected and the new icons right on the menu bar.
- Easily set a "Start Up Module" in the User Profile to open when logging into Client Data System.
- The color depth and resolution have been increased throughout the application.
- Client Data System fonts now draw directly from selected Windows fonts.
- Spreadsheets and Calendar views include optional shading for easy reading.
- Calendar views include far more information about each activity. Pop-up tool tips show more information when a cursor is rolled over the activity on the MonthView and WeekView.
- Expanded views on most record types to provide more fields for information.
- Reports in every module have an updated and consistent appearance.
- Expanded and refreshed Help System.



Technology Upgrades

Sybase Version 9.0

- Better cache management
- Improved query processing
- Better database design

Updated Spreadsheet Controls

- Faster and improved sorting
- Custom colors, widths and scroll bar lengths
- Windows checkbox appearance

Crystal Reports Upgrade

- Improved performance and speed
- Optimized formatting features
- HTML Preview

E-Z Editor and Text Controls

- More font control
- Bullets and numbered lists
- Headers and Footers
- Export directly to PDF format

Spelling Check Upgrade

- Real time spell check as in MS Word
- Integration with the custom dictionary in the default word processor

Network/Client Design Changes

- Less reliance on C-tree
- Better version identification controls

New Scanner Interface

- Duplex scanning

New Version of Fax Manager

Optimized Database Rebuild Utility

Online Help System

- Updated regularly
- Superior navigation
- Opportunity to provide feedback



Base System Innovations

- Optimized font sizing and color controls set through your Windows selections
- Expanded options on most Search windows
- Toolbar resizing for easier viewing
- Set your Startup Module to open automatically when you log in
- More options in the User Profile
- Revisions to Browse folders to improve clarity
- Spreadsheets optimized to take full advantage of modern Windows color and appearance schemes
- Better control of ordering on drop-down lists
- Expanded Import/Export Capabilities – Microsoft Excel, HTML, CSV, VCF (Outlook Contact format)
- Exported files open in their native program so changes can be made immediately
- Better printer options control
- Search option for the SmartPad
- More Merge Codes
- The Activity Tracking Module is now available as a stand-alone optional module
- Standard Agent Hourly Rate for the Timer can be set in the User Profile
- Numerous solutions for the Commission Tracking Module
- Note: The Commission Tracking Module requires a resolution of 1024x768 in CDS v6 because the record tabs have been notably expanded and are not fully viewable with a lower resolution



Contact / Business / Agent Modules

Contact Module Progress

- HIPAA protection to prevent inappropriate mailings, based on products purchased, including clearance tracking
- Contact Reports revised for clarity and consistency
- Optional Secure Fields for Social Security Number/Tax ID, Mother's Maiden Name and Driver's License ID
- Category Field added to coincide with Microsoft Outlook and Lotus Notes Contact records
- More options in the Contact search windows: Category and e-mail address options have been added
- Image window on the Additional Personal tab to show a picture of the Contact
- Phone Numbers moved to the top of the Personal tab for easy access
- MapQuest button in the Address section opens a map of any address in the Contact's list
- The Remarks field now allows for four times more characters than before
- Optimized record appearance throughout the various tabs
- Key Relations tab expanded considerably, including much more contact information and details on the Dependents and Business Relations
- Key Relations tab now includes a read-only Family Income tab
- Key Relations can be added more easily now, with prompts to use information from the main Contact's record
- New Letters/Documents tab for easier access to the Letter and Image Logs
- Net Worth free-form field added to the Additional Personal tab
- More fields on the Custom tab, in all categories
- Deleted Contacts are now automatically saved in a CDS Extract file that can be reloaded by the Administrator, as needed
- Addresses are easier to add – current Country is automatically added and Spouse addresses are automatically copied over when a Dependent Spouse is upgraded to a full Contact
- More Contact Search options: Category, E-mail address



Business Module Progress

- Optimized search and record configuration to increase consistency with Contact searches
- More Business Search options: Category, AlphaKey custom field, E-mail address
- Phone Numbers moved to the top of the Personal tab for easy access
- MapQuest button in the Address section opens a map of any address in the Contact's list
- Group Census tab optimized for improved sorting, column consistency and filtering
- Exports and more mailing options from the Group Census tab.
- Optional Secure Field for Tax ID
- New Letters/Documents tab for easier access to the Letter and Image Logs
- More fields on the Business Custom tab, in all categories
- Warning messages for deletions and confirmations for changes added to make functionality consistent with the Contact Module
- Mass mailings for sets of Business records now possible
- More Business-related Merge Codes
- More reporting options for Business records

Agent Module Progress

- Optimized record configuration to increase consistency with the Contact and Business Modules
- New Letters/Documents tab for easier access to the Letter and Image Logs
- More search options: Business Name, Source, Social Security Number, Category and Type
- Phone Numbers moved to the top of the Personal tab for easy access
- MapQuest button in the Address section opens a map of any address in the Contact's list.



Calendar and Letters Modules

DayView, WeekView and MonthView Innovations

- Redesigned and separate Add Activity windows for Timed and Non-Timed Activities for ease of use and increased clarity
- Start Time and End Time has replaced duration to set the length of a meeting, matching established standards for this kind of setting
- Updated and optimized Calendar Views – DayView, WeekView and MonthView are all clearer and easier to review
- WeekView and MonthView now have pop-up tool tips with activity descriptions of the Subject and Reason
- WeekView has been expanded to include user names on activities
- WeekView now expanded with the resizing of the window
- Activities can now be set to be All Day and are displayed at the top of DayView/WeekView/MonthView lists of timed activities
- Time and Date Selection tools have been made much easier
- Superior Reminder controls for activities
- E-mail invitations are included for users on different databases
- Created On/Created By fields added to activity records
- All Calendar Views now include the User Name in the title bar - Group or All Users views are also noted
- More custom color choices for color-coding priorities
- All Day Events now tracked in a separate section of the Calendar
- Alerts now have superior handling, are session-based and are consolidated when more than one comes up
- Recurring Activities have been redesigned to work more efficiently, be easier to revise and to make them integrate better with Microsoft Outlook and Lotus Notes
- More options for Mass Correspondence – better e-mail handling, attachments can now be sent to a list of Contacts and more choices throughout
- Activity Creation now includes the ability to invite users through e-mail and not just Internal Messages

Letter Writing / Form Letters

- Form Letter privacy and security by user or group.
- Streamlined mass mailing process to get your correspondence out with less clicks and selections
- E-mail mass mailings allow for attachments, read and delivery receipts and priority
- Retain copies of mass mailings or just sent them without storage
- HIPAA protection for mass mailings, to prevent inappropriate correspondence



Administration, Security and HIPAA

Administration and Security Progress

- Simple encryption on every database
- Stronger administrative control of password changes and module control through the new CDS Administrator program (coming soon)
- Database utilities built into CDS Administrator
- Required password and user name entry
- Password expiration after forty-five days
- Workstation install authorization required to help control access to your database
- Optional secure fields on Contact and Business records
- Deleted Contacts can be restored by the administrator
- Online Registration for easier Control File distribution and immediate purchase of new modules
- Administrator can set limits to the size of SmartPad attachments

HIPAA Protection

- HIPAA protection at the Contact level based on Policy purchases to prevent inappropriate sales calls
- HIPAA protection during mass mailings to prevent any inappropriate correspondence
- HIPAA Clearance tracking at the Contact level with an automatic date adjustment



Microsoft Outlook / Lotus Notes Synchronization and Posting

Microsoft Outlook Synchronization

- Optimized setup procedure now accessible from the User Profile
- More control over what comes over – limit synchronization to just Contact, Activities, or Notes
- More accurate progress bars during synchronization
- New Synchronization Timer that can be set to run at certain times instead of just at startup and shut down
- Streamlined processing and simpler conflict resolution options
- More options to optimize synchronization, ability to minimize the Synchronization process, quicker processing, easier interface

Microsoft Outlook Posting

- Optimization to improve speed
- More posting options, including the option to add keywords
- Posting option added to the Context menu in Outlook
- Easier access to the Help system

Lotus Notes Synchronization/Posting (Coming Soon)

- Calendar and Contact Synchronization now available
- Synchronization Timer that can be set to run regularly
- E-mail Posting now available



Internal Messaging System

- Optimized performance by moving the messages to the database instead of relying on the C-Tree access
- Integration with e-mail to include users in other databases
- Some message printing issues addressed
- Internal Messages now sent for all activity participants, not just the first one
- Button designations clarified
- Messages can be tracked as “Done” now
- Numerous solutions introduced to improve overall performance



Policy Tracking Module

- Policy icons are all standard, with a white scroll and a yellow seal
- Policy Reports revised for clarity and consistency
- The original Policy Reports can be restored by simply selecting “Classic Crystal Reports” in the User Profile
- Policy Notes can now be posted to the SmartPad automatically if the user would like them to be added there
- HIPAA protection is automatic depending on the Policy’s Product type
- Policy Reports can now be run from a business group census with multiple contacts
- Policy Data Report issue regarding retention of previous data resolved
- Master Policy Posting optimized

Pending Case Module

- Pending Case icons are all standard, with a blue scroll and a red seal
- Numerous solutions introduced to improve performance
- Pending Case windows optimized to include more information and clarify presentation
- Quick Case View provides a one-page overview of a Pending Case
- Pending Case Reports revised for clarity and consistency
- The original Pending Case Reports can be restored by simply selecting “Classic Crystal Reports” in the User Profile
- Policy Notes can now be posted to the SmartPad automatically if the user would like them to be added there
- HIPAA protection automatic depending on the case’s Product type
- Policy Reports can now be run from a business group census with multiple contacts
- Master Policy Posting optimized
- Better integration with the Commission Tracking Module
- Policy Data Report issue regarding retention of previous data resolved
- NOTE: The Pending Case Module requires a resolution of 1024x768 in CDS v6 because the record tabs have been notably expanded and are not fully viewable with a lower resolution



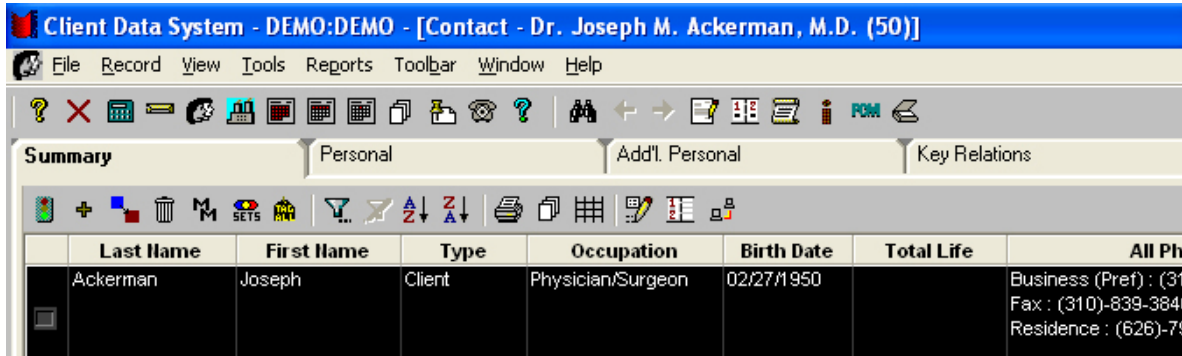
Group Benefits Module

- Group Policy icons are all standard, with a set of yellow scrolls and a red seal
- Group Policy windows optimized to include more information and clarify presentation
- Optimizations to the module to improve performance
- Increased consistency between this module and the Individual Benefits modules for ease of use
- Expansion of fields for the Other product type
- Master Policy Posting optimized
- Better integration with the Commission Tracking Module

Investment Tracking Module

- Investment Reports have been refreshed and revised for increased clarity and visual appeal
- The original Investment Reports can be restored by simply selecting “Classic Crystal Reports” in the User Profile
- Investment Remarks field expanded considerably
- Improvements to investment validation
- Numerous solutions to improve performance and accuracy






The New Face of CDS



































Becomes...










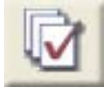

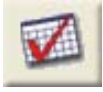





































CDS 4.3 to 6 Icon Glossary

		Help			SmartPad
		Close CDS			Dialer
		Calculator			Sets
		Internal Messaging			Word Processor
		Contact			Individual Policy
		Business			Investments
		Calendar Month View			Pending Case - PCM
		Calendar Week View			Agents / Producers
		Calendar Day View			Individual Product
		Dynamic Reports			Insurance Carrier

		Group Product
		Group Policy
		Transaction Download
		Online Help
		Word Processor
		Find
		Add
		Delete
		Posting
		Security Price Update
		History Price

		Continue
		Pause
		Modify Record
		Mass Modify
		Tag All
		Filter
		UnFilter
		Sort Ascending
		Sort Descending
		Print / Fax
		Customize Layout

		Run			Change Type
		Uncompress			Reschedule
		Process All Files			Mark Activity Done
		Security			Go To
		Account Master			Today
		Direct Financial Activity			Mass Correspondence
		Distribution Activity			Save
		Account Position			Letters
		Previous			Activity Log
		Next			Spreadsheet Export
		Policy Statistics Report			Images

		New Message
		Mark Message Done
		Consolidate SmartPad
		Consolidate Household
		Attach File
		Show Linked Record
		Reply
		Reply to All
		Forward
		Activity Outcome
		View Posted Email