



Client Data System®

Activity Data Validation

User Guide

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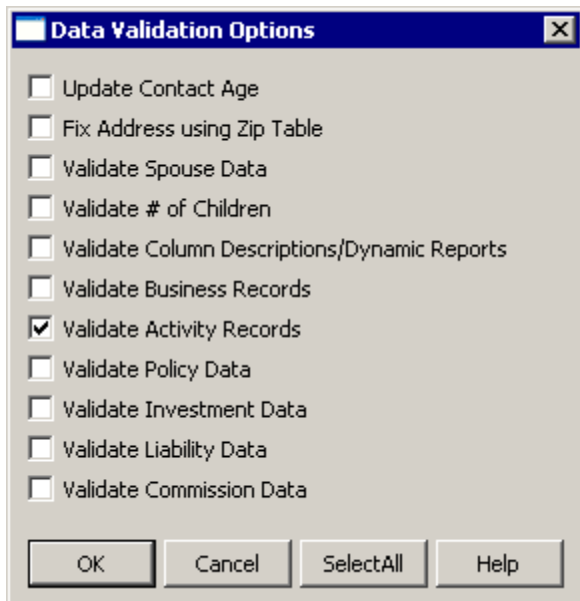
Introduction

This guide is used to explain the Activity Data Validation process for Client Data System® (CDS). Data validation verifies and updates information contained in the database.

Validate Activity Records

The Complete Data Validation option can be used to validate all records in CDS, but it can also be used to only validate activity records.

1. Select **Complete Data Validation** from the expanded **Database** menu to open the Filter Selection dialog box.
2. Click the **OK** button to open the Data Validation Options dialog box.



3. Select the **Validate Activity Records** option and then clear all other options.

- Click the **OK** button to open the Select Activities to be Validated dialog box.

- Select the appropriate Activities, Type, Priority, Date Range, and Assignee(s) for validation.
Note: The activities can also be validated from the Day, Week, and Month Views by selecting the **Data Validation** option from the expanded **Record** menu.
- Click the **OK** button to begin the validation process.

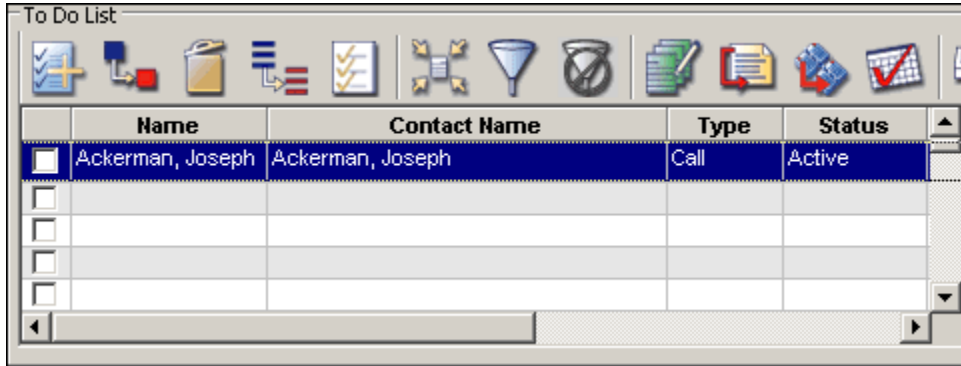
Activity Data

The Activity Data is updated if the Name column in the Activity Summary or DayView does not match with the Contact Name column.

	Name	Contact Name	Type	Status
<input type="checkbox"/>	Ackerman, Joseph	Anderson, Phillip	Call	Active
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

This difference can occur when the name of a Contact is modified for some reason or if the activities are imported into CDS without having the complete information (Name) entered and this record is modified later.

After running Data Validation, the Contact Name is validated and both the Name and the Contact Name columns display the same value.



Activity Data Validation Process

1. Find the activity records matching the selection criteria (e.g., Activities (Timed or To Do), Type, Priority, Date Range).
2. If the Name and Contact Name value do not match for any activity, the value in the Contact Name column will be updated to the value in the Name column.

The following field is updated upon Activity Data Validation.

Table Name	DB Column	Place on UI	UI Prompt
Activity	Buffer	Activity DayView	Contact Name