



Client Data System®

v6.1 Progress Guide



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Introduction

Client Data System version 6.1 is a service release. The main goals of this particular release are to resolve any issues that were reported in CDS 6 that could not be included in the final release and to address feedback received from the users.

This document lists the solutions we have addressed in each of the modules in Client Data System v6.1.



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 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 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 Lotus Notes R6**, or a later version, is required for Calendar and E-mail Posting synchronization with CDS.
- Please note that **CDS v6.1 does not support E-Z Conduit.**



What Users Should Know about CDS v6.1

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 v6.1 – 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 v6.1 does not support Windows 95, 98, Me, or NT. These operating systems do not have full support from Microsoft any longer; therefore, we cannot effectively support them either.
- CDS v6.1 requires Windows XP or later. Windows 2000 is not officially supported by E-Z Data, Inc. for Client Data System.
- E-Z Conduit is not supported in CDS v6.1. Existing Conduit users should upgrade to the superior and fully supported E-Z Mobile module if they want to upgrade to v6.1.
- CDS v6.1 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 Help System in CDS is linked to our Help Server to enable the latest information to be updated at any time. A static version of the Help files will remain on the disc but users must be connected to the Internet to receive the latest version.
- Passwords are now required for access to CDS and a good deal of Password management will be involved (changing passwords on a regular basis, lockout after three unsuccessful logins).
- Additional HIPAA requirements have been implemented 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 that the user specifies.
- All new icons are in the same place, most retain the original concept of the icon, and all feature a newly refreshed look.
- Buttons on the toolbar can be resized to a larger and easier to click format. Small, Medium, and Large icons are available.
- Updated menus have been implemented that draw from the Windows XP style with the colors you have specified and the new icons.
- 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 the selected Windows fonts.
- Spreadsheets and Calendar views include optional shading for easy reading.
- Calendar views include far more information on each activity. Pop-up ToolTips show more information when a cursor is rolled over the activity on the MonthView and WeekView.
- The views have been expanded on most record types to provide more information fields.
- Reports in every module have an updated and consistent appearance.
- The Help System has been expanded and refreshed.



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 Checker Upgrade

- Real time spelling checker as in MS Word
- Integration with the custom dictionary in the default word processor

Network/Client Design Changes

- Less reliance on C-tree
- More server-side processing to keep the workstation available
- 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

- In a spreadsheet, select a record, and with the Shift key pressed, select another record (down/up the list), all the records in between are tagged.
- Merge codes for dates in E-Z Editor or E-Z Word follow the Windows regional setting.
- Under Database → Utilities → Load Data menu, an option has been added for loading a .cds file to CDS. It unzips the .cds file and loads all of the extracted contacts to the current database.
- Whenever the user logs into CDS, the CDS icon displays on the system tray. If CDS is minimized, the user can double-click on the CDS icon in the task bar to bring CDS to the foreground.
- We have changed the existing implementation where the user could only merge one contact at a time. Instead, on finding potential duplicate records, the Potential Duplicates dialog box will be displayed in two separate sections: the Contacts and its duplicates.
 - In the User Profile, an option has been added under the Security tab to allow Mass Merging of duplicate records.
 - If this option is selected, the user can tag multiple records from the Contact spreadsheet in the Duplicate dialog box and merge all of the potential duplicate entries for each tagged contact at once.
 - If this option is not selected, the tag button will not be available in the contact spreadsheet and the user will have the option to merge the entries for the currently highlighted contact record only.
 - While merging the duplicates for a single contact record, the user will have the option to tag and select the duplicate entries that the user would like to merge with the highlighted contact record in the contact spreadsheet.
- The SmartPad spreadsheet now displays the Notes field and is ordered properly by date and time after the upgrade.
- The Print Options dialog box has been modified to provide the user with the option to either print or e-mail a spreadsheet.
 - When the e-mail option is selected, the user now has a choice to either e-mail the spreadsheet as an attachment or as the body of the e-mail.
 - The spreadsheet can be e-mailed as a .csv, .xls, or html attachment and the user is presented with the option to specify the attachment file name.
 - If a disclaimer is selected, it is added to the body of the e-mail.



- Import/Export now displays Contact Custom fields when a contact is selected.
- When printing a Dynamic Report/spreadsheet, the spreadsheet entries in the printed version are no longer cut off at the bottom.
- The issue with sorting the filtered values in the drop-down list when showing the Filter/Condition dialog box has been corrected.
- An issue when values in the drop-down list were missing when filtering a spreadsheet has been corrected.
- The special merge codes (usermain, spouse) now work in E-Z Word.
 - <<UserMain>><<Name>>
 - <<Spouse>><<F_CL_DOB>>
- When adding an image, it no longer flashes the image capture window.
- The spelling checker loading performance has been improved.
- PrinPro.exe has been updated to be compatible with CDS v6.1. There were no functionality updates.
- Multiple tagged contacts/businesses are now allowed when running policy, investment, and group policy reports. Tagged records are now handled when running Crystal Reports.
- CDS Administrator has been updated with the feature to load back a deleted contact in CDS from the Contact Recycle Bin section. When a contact is deleted from CDS, the contact details are extracted and a .cds file is created by zipping all the extracted information. The Administrator will have the option to add back this contact to CDS from the CDS Administrator - Contact Recycle Bin section.
- CDS E-Z Renewal has been updated to make the user interface more user friendly and provide version update support to the E-Z Data Product Registration system.
- The Outlook Sync component has been updated to provide more in depth support for recurring activities. Also, support has been added for synchronizing the contact image added in the Contact Additional Personal tab in CDS.
- The MS Outlook E-mail Posting component has been updated to provide integration for the Crystal Report e-mail feature, CDS Extract and E-mail feature, and the Spreadsheet E-mail feature from within CDS. In addition, support has been added to post an e-mail selected in MS Outlook to a particular Policy in CDS.



Contact / Business / Agent Modules

Contact Module Progress

- A ToolTip pop-up now displays with the address details when the cursor is positioned in the address type section of the spreadsheet.
- Upon clicking the Save button from the address ToolTip pop-up, the address detail is copied to the clipboard.
- From the contact spreadsheet, contacts can be tagged and reports can now be generated with the option to select tagged contacts (i.e., running Contact Details reports for tagged contacts); previously there was not an option to run reports for tagged contacts.
- The Auto ZIP Code feature now functions when a city with more than seven characters is entered.

Business Module Progress

- When viewing the Business Group Census or Key Relation tab, the current active Contact was not assigned properly. This created a problem when assigning new records for Addresses, Phone Numbers, and Key Relations, etc., to the current active contact.
- The Auto ZIP Code feature now functions when a city with more than seven characters is entered.

Agent Module Progress

- From the Agent Contract tab, previously the contract spreadsheet filled half of the screen instead of the full screen.
- The Auto ZIP Code feature now functions when a city with more than seven characters is entered.



Calendar and Letters Modules

DayView, WeekView, and MonthView

- The activity view setting (by current user, group, or all users) can now be saved.
- The To Do activity type defaults to “Call” and no longer “Appointment.”
- The Activity Snooze pop-up dialog box displays properly even when CDS is minimized.
- In the activity DayView, entering the End Time manually will now automatically update the End Date properly.
- Recurring activities created for another user can now be modified.
- From the DayView, in the All Day Events section, if the spreadsheet is double-clicked, the Activity Detail dialog box opens where the All Day Event option is selected. Right-click and select the Add button to open the Activity Detail dialog box where the All Day Event option is not checked. This is fixed for the DayView and MonthView.
- In the Activity Log, the Add To Do button is now defined.
- In the Activity Log, the Copy Activity button is now defined.
- The inability to create an activity with two participants, without including yourself (the non-participant), has been corrected.
- Activity SmartPad notes have been modified to reduce confusion.
- If the activity record is canceled before saving, the Activity Log spreadsheet no longer refreshes.

Letter Writing / Form Letters

- Form Letter zooming in/out is now more consistent and proper.
- The Form Letter two-page mode no longer displays an empty page.
- In the Form Letter Print dialog box, double-click a letter to print the letter.
- Double-clicking on a blank row in the Form Letter spreadsheet no longer crashes the system.
- Envelopes no longer have a header and footer.
- Envelopes no longer print on more than one page.
- The envelope preview now displays only one page even if the user selects two pages.



Microsoft Outlook / Lotus Notes Synchronization and Posting

Microsoft Outlook Synchronization

- The Export Contact to CDS option was added to the context menu in Outlook when a contact is selected.
- If the Contact that the user is exporting is already synchronized to CDS, the user will be asked if he/she wants to merge the record in Outlook to the existing record in CDS, instead of inserting a new record.

Microsoft Outlook Posting

- Crystal Reports can now be e-mailed as a PDF attachment.
 - The user e-mail address entered in the User Profile is added to the Mail To list.
 - For the Contact Detail report generated for multiple contacts, the e-mail address for each contact record is added to the BCC list.
 - For the Contact Detail report generated for multiple contacts, each contact should be mailed the report specific to his/her own record. The full report will be e-mailed to the user and to any additional e-mail address entered by the user in the Report E-mail dialog box.
- The ability to extract and e-mail contact record(s) to other CDS users has been implemented.
- Policy/PCM posting has been implemented.

Lotus Notes Posting

- Crystal Reports can now be e-mailed as a PDF attachment.
- The ability to extract and e-mail contact record(s) to other CDS users has been implemented.
- Policy/PCM posting has been implemented.



Internal Messaging System

- Whenever the user receives a new internal message, a Message icon is added to the system tray. Double-click this icon to bring CDS to the foreground with the message module open.
- In the User Profile, an option has been added on the Misc. tab to Display an Internal Message Notification. If this option is selected, a pop-up will display in the bottom right corner of the screen, displaying the details of the message.
- The pop-up displays only once for a particular message.
- In the pop-up, if we click the cross button on the left side, the user will be prompted to delete the specific message. Click Yes to delete the message from CDS.
- If the message has a priority set as Urgent, the pop-up will display a flag icon on the left.
- The user can cancel the pop-up by clicking on the 'x' mark at the upper right corner.
- The Mark Done option is now defined.
- Added support to forward/reply to sent messages.



Policy Tracking Module

- Validating policies now updates the policy's age. In previous CDS versions, the policy's age was only updated when the user changed the policy's date.
- A SmartPad posting on Policy Premium changes has been added.
- From the Policy's Payment History tab, the Payment History spreadsheet has been expanded to make a better use of the screen.

Pending Case Module

- In PCM, the primary agent information in the NB table (Policy) table is now populated each time the Policy Agent spreadsheet is updated.
- In PCM, if the Plan/Product did not have a Risk Class defined, inserting/updating a PCM was not allowed. The Risk Class drop-down list was empty and the user did not have any Risk Class options to choose from; therefore, CDS did not allow the saving of any changes. Now, it will display a warning about the requirement having a Risk Class, but will enable the user to save the changes.
- After adding a new PCM record, adding a Policy Advisor or a Policy Client for the newly created PCM (by clicking the Add button) will no longer create an orphan PolAgent and PolCInt record.
- Made better use of the space on the PCM's Underwriting and Delivery tabs.
- The PCM Report Setup has been corrected to populate the Commission Report data.
- The PCM reports can now be filtered by the tagged PCM entries in the PCM Summary instead of using the regular filter.



Group Benefits Module

- The Group Policy spreadsheet now has the same color-coding as the Policy spreadsheet.

Investment Tracking Module

- The Dollar Weighted Returns from Inception – Gain/Loss report now displays subtotals.
- The Investment Crystal Reports have been updated (resolved wrong subtotalling).
- The Portfolio Performance report showing ‘All Investments’ has been corrected.
- The Price Update dialog box is no longer prompted before selecting a subaccount.
- Once a date is selected, the date becomes the default for the whole session.
- Price update now creates a price history in the correct subaccount.
- The Security Master Internet Quote Service from Yahoo has been updated.
- When tagging multiple records, a bad symbol will no longer display an Unable to Resolve Name error (monthly end only).
- The issues have been resolved when using the Price Update dialog box.

MobileMerge Module

- The database information is now available in read-only form when not connected to the network after a successful reconciliation.
- MobileMerge – Sets Only is an optional feature which can now be turned on/off from the User Profile.
- The ability to take only a set of contacts and related information into the mobile session has been implemented.
- The Exit Reminder Message (MobileMerge) is an optional feature that can be turned on/off from the User's Profile.