

Application	ChreosServer – Chreos 3
Access	“Companies Data Management”
Minimum service pack	SP26
This document	Data Management Ref 53.1 Release 1 Published January 2002

Overview

Data management updates the data table indexes, removes records marked for deletion and validates various totals and other aspects of the data.

Running Data Management

- Make sure that no instances of *ChreosClient* are logged into the company.
- Select the company in *ChreosServer* from the list on the left-hand side.
- Select the menu option “Companies | Data management”. This can also be found by right clicking on the required company and selecting “Data management”.
- Log into the selected company and the Data management screen will appear.
- Check or un-check the check boxes.
- Click the [Process] button.
- Once the data management has been completed click the [Close] button.

The 4 Check Boxes

- **Pack data.** Tables are refreshed by removing deleted records. When data management is run as part of installing a new service pack it may also add new fields to existing tables and add new tables.
- **Reindex data.** Table indexes are recreated. These are used to manage the order that records are displayed and printed in, and speed up searches for items, clients etc.
- **Validate data.** This process makes sure that many of the tables are correct, and that links between the tables are valid.
- **Secondary maintenance.** This does a range of maintenance activities that are needed less often such as validating sort codes for stock. It also does some of the alterations that are shipped with service packs.

Examples of When To Run Data Management

- Before the end of period processing for clients, creditors and general ledger it is important to run data management with all four check boxes ticked. End of period processing means after all data has been entered and before running period reports such as trail balances and debtor statements.
- With the top three check boxes ticked, run data management every day. However this can be less frequent if there has not been significant data entry.
- Run data management with only the third check box ticked after there has been activity in Client Allocation.
- “Data management” will automatically run after each new service pack is installed.

Related Issues

To set your system to automatically run ‘Data management’ refer to the “Automated functions (53.3)” information sheet.

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