samegoal

Validate Documents

Document validation rules include checks for compliance, completeness and consistency. If there are any unsatisfied validation rules, the document cannot be marked as complete.

If a document contains unsatisfied validation rules and a user attempts to mark that document as complete, a dialog will appear indicating the **document**, **number of errors**, and **expandable list of error descriptions**. Users can click the links within the message to be taken into validation mode for the document.

Real-time Validation

As a user works in a document that has validation rules:

- All required document fields will be marked with a red asterisk (*).
- Any field that has a validation error will be marked with a red dot.
- Hovering over the asterisk or dot will display the validation error message.
    - *Note: Validation error messages appear in sequence. For example, if a date is a required field and the user types in an invalid date, the asterisk will become a red dot and show the invalid date message.*
- Once each issue is resolved, the asterisk or red dot will disappear.

Tip Not all forms contain validation rules. If a form does not contain any validation rules, the validation mode icon (check mark in a circle)in the toolbar will be disabled, and no field validation errors will be marked with a red asterisk or dot.

Validation Mode

Using validation mode allows users to view and resolve all remaining errors quickly.

Steps *To use validation mode:*

1. Find the document you wish to validate.
2. Click on the name of the document to open.
3. Click the validation mode button (check mark in a circle) in the toolbar next to the printer icon.The icon will become highlighted and a left and right arrow will appear.
4. Click the left and right arrow to go to previous and next errors respectively. The current error under review at any given time is marked with a red box.
5. Resolve errors. Once an error has been resolved, the red box and asterisk/dot will disappear.
6. Once all the errors have been resolved, a "No validation errors" message will appear at top.
7. You can now mark the document complete.