

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.

Q 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.