Data — Learning Path

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Learning Paths › Data

This learning path is for users who maintain and use organizational data in the Data app. You'll learn how to locate and work with account, contact, project, and VL registration records, and how to use reference lists to support consistent data maintenance.

Learning objectives

- By the end of this path you can … find and review account records in the Data app.
- By the end of this path you can … locate and maintain contact information in the appropriate record area.
- By the end of this path you can … work with project records as part of daily data operations.
- By the end of this path you can … review VL registrations when supporting registration-related work.
- By the end of this path you can … use reference lists when performing consistent, periodic data maintenance.

Prerequisites

- Access to the **Data** app.
- Permission to view and, where required, maintain records in the relevant Data screens.
- Familiarity with basic business records such as organizations, people, and projects.

Module 1: Establish a reliable data foundation

Learn to start with the organization and person records that support day-to-day work.

Lesson 1.1: Find the right organization record

When you need to confirm information for an organization before continuing work, begin by locating its account record. Open Accounts and use the available account records to identify the organization you need. Review the account record before making or coordinating any related data work, so you are working from the correct organizational context.

Practice task: Open Accounts and locate an account record you can use as a reference for later work.

Lesson 1.2: Work with people in the correct data area

When a request concerns an individual rather than an organization, use the contact records instead of relying only on account information. Open Contacts, locate the relevant person, and review or maintain the contact record according to your access. Keep organization-focused work in Accounts and person-focused work in Contacts.

Practice task: Open Contacts and identify a contact record relevant to the account record you reviewed.

Module 2: Support operational work with project data

Use project records to find and manage the information needed for active business work.

Lesson 2.1: Locate a project for an operational request

When a colleague asks for information about a piece of work, first establish which project record is relevant. Open Projects, find the project that matches the request, and review the project record before responding or taking follow-up action. This keeps the work anchored in the project rather than in disconnected account or contact information.

Practice task: Open Projects and locate a project record that you can review.

Lesson 2.2: Choose the right record area during daily work

When you receive a request involving an organization, a person, and a project, decide which Data screen is the primary place to work. Use Accounts for organization-focused questions, Contacts for person-focused questions, and Projects for work focused on a project. Move between the relevant screens only as needed to complete the request.

Practice task: Choose a realistic work request and state whether you would start in Accounts, Contacts, or Projects.

Module 3: Handle registrations and maintain consistent reference data

Complete specialized review work and support the consistency of the Data app over time.

Lesson 3.1: Review a VL registration

When you need to support a registration-related inquiry or check registration information, work from the dedicated registration area. Open **VL registrations**, locate the relevant registration record, and review it in the context of the request. Use this screen for registration work rather than treating a contact or project record as the primary registration source.

Practice task: Open **VL registrations** and locate a registration record to review.

Lesson 3.2: Use reference lists for consistent maintenance

When performing periodic cleanup or maintaining standardized data, consult the reference information available to your team. Open Reference list and review the available reference entries before carrying out related maintenance in another permitted Data screen. This helps you apply the same reference information consistently across records.

Practice task: Open Reference list and identify a reference entry you would consult before performing related data maintenance.

Lesson 3.3: Triage a cross-record data request

When a request spans several kinds of data, begin with the screen that represents the request's primary subject, then use supporting screens as necessary. For example, start in **VL registrations** for a registration inquiry, Projects for a project inquiry, or Contacts for a person inquiry. Consult Reference list when consistency with reference data is needed.

Practice task: For a registration inquiry that also mentions a person and a project, identify the screen where you would start and the supporting screens you might consult.

Final assessment

1. A colleague asks you to verify details about an organization before they continue work on a customer request. Which screen should you open first, and why?
2. You receive a request to review information about a specific individual. Which screen is the appropriate primary workspace?
3. A team member needs information about a named piece of business work and does not yet know which other records may be relevant. Where should you start?
4. You are asked to investigate a question specifically about a VL registration. Which screen should be your primary source for the investigation?
5. Before completing a periodic data-maintenance activity, you need to ensure the work follows the organization's available reference information. Which screen should you consult?

Answers

1. **Accounts** — the request is primarily about an organization, so the account record is the correct starting point.
2. **Contacts** — contact records are the appropriate area for person-focused information.
3. **Projects** — the request is centered on a project, so begin with the project record.
4. **VL registrations** — registration-related inquiries should be reviewed in the dedicated VL registrations area.
5. **Reference list** — reference lists support consistent, standardized data-maintenance decisions.