

# INSTALLATION & QUICK SETUP - IN Data Manager

This document indicates the steps to follow to generate a complete cycle of the IN Data Manager app.

# Requisites

The IN Data Manager app must be installed for use IN Data Manager GB. You can install it from Microsoft AppSource through this link:

https://appsource.microsoft.com/es-es/product/dynamics-365-businesscentral/PUBID.innovationconsulting%7CAID.indatamanager%7CPAPPID.1381ff45-45d0-4f0d-9a89-5ae4b04c0cc1

# Change dashboard interface

The homepage related with the Data Manager interface can be changed as follows, if it is not already established:

On the top right corner search for a settings icon like in Figure 1 and click it.



### Figure 1: My Settings button

Then clicking on **My Settings** as shown in **Figure 2**, a new window will pop up.

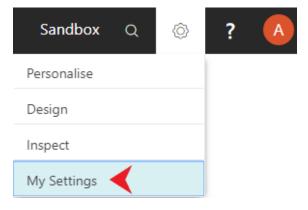


Figure 2: My Settings

On the Role Center (Figure 3) row, click the dots to unfold the list.



EDIT - MY SETTINGS

| Role  | IN Data Manager                      |          |  |  |  |
|---|--------------------------------------|----------|--|--|--|
| Company   | CRONUS International Ltd.            |          |  |  |  |
| Work Date · · · · · · · · · · · · · · · · · · · | 27/01/2022                           | <u> </u> |  |  |  |
| REGION & LANGUAGE                               |                                      |          |  |  |  |
| Region  | Spanish (Spain)                      |          |  |  |  |
| Language  | English (United States)              |          |  |  |  |
| Time Zone · · · · · · · · · · · · · · · · · · · | (UTC+01:00) Amsterdam, Berlin, Bern, |          |  |  |  |
| Notifications                                   | Change when I receive notifications. |          |  |  |  |
| Your last sign in was on 06/05/20 14:31.        |                                      |          |  |  |  |

| ОК | Cancel |
|----|--------|
|    |        |

Figure 3: Role Center profile

At the end of the list you can find the IN Data Manager Profile like in **Figure 4**. Please select it and then click OK to confirm your action.

|               | Finance                 |
|---------------|-------------------------|
|               | Human Resources         |
|               | IN Apps Analyzer        |
|               | IN Apps Analyzer Docker |
| $\rightarrow$ | IN Data Manager         |
|               | IN Translate            |

Figure 4: Module selection

### Create Customers for testing the IN Data Manager

In order to test the solution, we must have some data in system. For that action we will need to create a few customers.

On the right top corner, you can find a search button as in **Figure 5**. Click on it and type **customers**.



Figure 5: Search button

A list will appear with the search results. Click on the first row as shown in Figure 6.



| TELL ME WHAT YOU WANT TO DO      | $\swarrow$ $\times$ |
|----------------------------------|---------------------|
| customers                        |                     |
| Go to Pages and Tasks            | Show all (12)       |
| > Customers                      | Lists               |
| > Create Contacts from Customers | Tasks               |
| > Dialog Customer Id             | Administration      |

### Figure 6: Customer search

The view related with the Customers will appear. The creation of a Customer is a very simple and fast process. Click on the New button (**Figure 7**) to display the Customer card in order to fill the customer data.

| $\leftarrow$ | CUSTOMERS |       | _      |         |
|--------------|-----------|-------|--------|---------|
|              | 🔎 Search  | + New | Manage | Process |
|              |           |       |        |         |

# Figure 7: New Client button

There is no need to fill all the details of the customer, but only the rows that have a red asterisk, as in **Figure 8**. If some other fields are required to complete the process the system will notify you with a message and will not let you proceed.



# Figure 8: Required Field

When the customer creation process concludes we can start the next process.

# Changes Template Creation

On the main dashboard page, under the activities tab, there are the predefined templates. You can also define your own.

To do so click on Templates square (the number of templates might vary with the creation or deletion of the templates) like in **Figure 9**.



# Activities

| Information<br>CHANGES DELETIONS |         |  |           |         |  |
|----------------------------------|---------|--|-----------|---------|--|
| TEMPLATES                        | HISTORY |  | TEMPLATES | HISTORY |  |
| 5                                | 2       |  | 5         | 2       |  |
| →<br>→                           | >       |  | >         | >       |  |

Figure 9: Changes Templates

You will notice that there are already created templates, but it is not a relevant matter because we will create our own.

The next step to do is to click on the New button like in Figure 10.

| $\leftarrow$ | TEMPLATES |       |             |          |
|--------------|-----------|-------|-------------|----------|
|              | ✓ Search  | + New | 🐯 Edit List | 📋 Delete |

Figure 10: New Changes Template button

After that you need to give the template a unique name.

Once the template is created the table settings must be set up. Select the desired template and on the top bar click the **Navigate button** -> **Table Settings**. The figure 11 shows the related buttons.

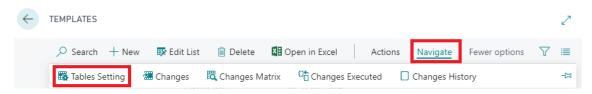


Figure 11: Table Settings

The level of knowledge needed to understand the setting table is more technical. To resume, all you have to do is select a table and the fields that you want to modify.

Under the **Tables** tab, click on the **TABLE ID. Row** and select the Customer table from the list which, in this case, is number **18**. Details are shown in **Figure 12**.



| ables |           |   |          |           |               |  |  |
|-------|-----------|---|----------|-----------|---------------|--|--|
|       |           |   |          |           |               |  |  |
|       | ENTRY NO. |   | LINE NO. | TABLE ID. | TABLE CAPTION |  |  |
|       | 10        | ÷ | 10000    | 18        | Customer      |  |  |
|       |           |   |          |           |               |  |  |

Figure 12: Table setting

Under the **Fields** tab, click on the **FIELD NO. Row** to select the field from the previously chosen table. In this example the **Name** field was selected. **Figure 13** shows the rows with the details.

| elds      |   |                   |           |               |           |               |
|-----------|---|-------------------|-----------|---------------|-----------|---------------|
| elds∨     |   |                   |           |               |           |               |
| ENTRY NO. |   | TABLE<br>LINE NO. | TABLE ID. | TABLE CAPTION | FIELD NO. | FIELD CAPTION |
| 10        | 1 | 10000             | 18        | Customer      | 2         | Name          |
|           |   |                   |           |               |           |               |

Figure 13: Table fields

You can specify the filter fields for each table. It is the same process as in Table fields.

| Filt  | ers       |   |                   |           |               |           |               |              |
|-------|-----------|---|-------------------|-----------|---------------|-----------|---------------|--------------|
| Filte | ers 🗸     |   |                   |           |               |           |               |              |
|       | ENTRY NO. |   | TABLE<br>LINE NO. | TABLE ID. | TABLE CAPTION | FIELD NO. | FIELD CAPTION | VALUE FILTER |
|       | 10        | ÷ | 10000             | 18        | Customer      | 1         | No.           | CL001        |
|       |           |   |                   |           |               |           |               |              |

Figure 13.1: Table filters

# Changes Template Use

After the template creation is done, it can be used by clicking **on Navigate button -> Changes** or **on Navigate button -> Changes Matrix** as shown in **Figure 14**.

The only difference between the two options is the design.

| $\leftarrow$ | TEMPLATES      |               |           |  | 2   |
|--------------|----------------|---------------|-----------|--|-----|
|              | ✓ Search + New | e 💀 Edit List | 📋 Delete  | Comparing Excel         Actions         Navigate         Fewer options         Yes | '≣  |
|              | Tables Setting | 🔠 Changes     | Changes M | trix Changes Executed Changes History  | -12 |

Figure 14: Template options

After choosing the pattern you want to use for the data changes, you will have to click on **the Load Data to modify** button as shown in **Figure 15**.



| $\leftarrow$ | CHANGES MATRIX   | √ SAVED , × K |   |
|--------------|--|---------------|---|
|              | C Search B Edit List Den in Excel Actions Fewer options  | 7 ≡           |   |
|              | Next Table   Previous Table  Next Block  Previous Block  Subscription  Save Data in system  S | -13           | 1 |

### Figure 15: Load Data to modify

If there is no data to load, the cause might be that there is no data in the desired table.

You can modify the records.

| CHANGES MATRIX |              |             |                 |           |               |   |                |
|----------------|--------------|-------------|-----------------|-----------|---------------|---|----------------|
|                | 🔎 Search     | 🐯 Edit List | Vpen in Excel   | Actions   | Fewer options |   |                |
|                | REL          | ATED RECORE | DID TEXT        |           |               |   | NAME           |
|                | Cust         | omer: CL001 |                 |           |               |   | CL 001         |
| $\leftarrow$   | CHANGES MATE | RIX         |                 |           |               |   |                |
|                | 🔎 Search     | 💀 Edit List | 💶 Open in Excel | Actions I | ewer options  |   |                |
|                | RELA         | TED RECORDI | D TEXT          |           |               |   | NAME           |
|                | Custo        | mer: CL001  |                 |           |               | ÷ | CL 001 Changed |

After finishing the modification process, you will have to save the changes by clicking on the **Save Data** in system button. **Figure 16** shows where the button is placed.

| $\leftarrow$ | CHANGES MATRIX  | √ SAVED <sub>↗</sub> ⊄ |
|--------------|---|------------------------|
|              | P Search         Image: Edit List         Image: Image: Power options         Actions         Fewer options | ∑ ≡                    |
|              | Next Table  | -tə                    |

Figure 16: Save Data in system

The process concludes with this last action. To see if the changes have been successfully done you can check the customer table (in this case) and compare the old and new results.

There is an option to revert the last changes made. In order to do so you must click **Navigate -> Changes Executed** as shown in **Figure 17**.

| TEMPLATES      |                       |                   |                    |               | 2                         |
|----------------|-----------------------|-------------------|--------------------|---------------|---------------------------|
| ✓ Search + Nev | v 🐺 Edit List 📋 Delet | e 🚺 Open in Excel | Actions Navigate   | Fewer options | $\bigtriangledown \equiv$ |
| Tables Setting | 🖀 Changes 🛛 🛱 Changes | Matrix            | uted 🗌 Changes His | tory          | -17                       |

Figure 17: Changes Executed

Afterwards, **select the last line** of the list and click on **Actions -> Revert Changes** like in **Figure 18**.

| $\leftarrow$ | CHANGES EXCECUTED          |            |          |               | ✓ SAVED | 2  |
|--------------|----------------------------|------------|----------|---------------|---------|----|
|              | 🔎 Search 🛛 🛛 Open in Excel | Actions    | Navigate | Fewer options | V       | =  |
|              | Revert Changes             | LINITE NO. |          | LINE NV. DATE |         | 무기 |



# **Deletions Template Creation**

The process is the same as for **Changes Template Creation**, but instead of making changes, it deletes the registers. It also has a revert changes option to recover the last modification made.

Access to the template is done as shown in Figure 19.

Activities

#### Figure 19: Deletions Templates

Once you access the template area, the steps for the configuration are similar to the previous configured template.

In order to create a new Deletion template, click on New button as represented in Figure 20.

| $\leftarrow$ | TEMPLATES |       |             |          |
|--------------|-----------|-------|-------------|----------|
|              | ✓ Search  | + New | 🐯 Edit List | 📋 Delete |

#### Figure 20: Delete Template

Remember to choose a unique name for the template.

Once that is done you have to set up the settings by clicking on **Navigate -> Table Setting** as shown in **Figure 21**.

| $\leftarrow$ | TEMPLATES          |             |                |                 |              |           |               |              | 2   |
|--------------|--------------------|-------------|----------------|-----------------|--------------|-----------|---------------|--------------|-----|
|              | ✓ Search + New     | 🞲 Edit List | 📋 Delete       | Open in Excel   | Actions      | Navigate  | Fewer options | $\mathbb{Y}$ | =   |
|              | 🛱 Tables Setting 🗙 | Deletions   | 🗖 Deletions Ma | atrix 🔤 Deletio | ons Executed | Deletions | History       |              | -17 |

Figure 21: Table Settings

Under the **Tables** tab, click on the **TABLE ID. Row** and select the Customer table from the list which is the number **18** in this case. Details are shown in **Figure 22**.



| Tab | les       |   |          |           |               |  |
|-----|-----------|---|----------|-----------|---------------|--|
|     |           |   |          |           |               |  |
|     | ENTRY NO. |   | LINE NO. | TABLE ID. | TABLE CAPTION |  |
|     | 10        | ÷ | 10000    | 18        | Customer      |  |
|     |           |   |          |           |               |  |

Figure 22: Table Settings

Under the **Filters** tab, click on the **FIELD NO. Row** to select the field from the previously chosen table. In this example the **No** field was selected. **Figure 23** shows the rows with the details.

| Filt      | ers       |   |                   |           |               |           |               |              |  |
|-----------|-----------|---|-------------------|-----------|---------------|-----------|---------------|--------------|--|
| Filters ~ |           |   |                   |           |               |           |               |              |  |
|           | ENTRY NO. |   | TABLE<br>LINE NO. | TABLE ID. | TABLE CAPTION | FIELD NO. | FIELD CAPTION | VALUE FILTER |  |
|           | 9         | ÷ | 10000             | 18        | Customer      | 1         | No.           | CL001        |  |
|           |           |   |                   |           |               |           |               |              |  |

Figure 23: Table filters

# Deletions Template Use

After the template creation is done it can be used by clicking **on Navigate button -> Deletions** or on **Navigate button -> Deletions Matrix** as shown in **Figure 24**.

| $\leftarrow$ | TEMPLATES      |               |             |                    |              |           |               |          | 2  |
|--------------|----------------|---------------|-------------|--------------------|--------------|-----------|---------------|----------|----|
|              |                | / 💀 Edit List | 📋 Delete    | Open in Excel      | Actions      | Navigate  | Fewer options | $\nabla$ | =  |
|              | Tables Setting | × Deletions   | 🛱 Deletions | Matrix 🛛 🖞 Deletio | ons Executed | Deletions | History       |          | -⇔ |

Figure 24: Template options

After choosing the pattern that you want to use for the data, you need to click on **the Load Data to delete** button as shown in **Figure 25**.

| $\leftarrow$ | DELETIONS MATRIX   | √ SAVED <sup>™</sup> |
|--------------|--|----------------------|
|              | Search Manage Den in Excel Actions Fewer options   | 7 ≡                  |
|              | ▶ Next Table ◀ Previous Table ▶ Next Block ◀ Previous Block 🕞 Load Data to delete × Delete records from system | -12                  |

# Figure 25: Load Data to delete

| $\leftarrow$ | DELETIONS MATRIX               |                 |             |             |        |
|--------------|--------------------------------|-----------------|-------------|-------------|--------|
|              | 🔎 Search Manage 🛛 🚺 Open in Ex | cel Actions Few | ver options |             |        |
|              | RELATED RECORDID TEXT          | N0.             | NAME        | SEARCH NAME | NAME 2 |
|              | Customer: CL001                | CL001           | CL 001      | CL 001      |        |

Figure 25.1: Records to delete

After the load data to delete process is finished, you will have to save the changes in system by clicking on the **Delete records from system** button as shown in **Figure 26**.



| $\leftarrow$ | DELETIONS MATRIX  | √ SAVED , <sup>∠</sup> |
|--------------|---|------------------------|
|              | Search Manage Den in Excel Actions Fewer options            | 7 ≡                    |
|              | ▶ Next Table ◀ Previous Table ▶ Next Block ◀ Previous Block | -12                    |

Figure 26: Delete records from system

At the end of this action the records are deleted from system. To revert the changes you must click **Navigate -> Deletions Executed** as shown in **Figure 27**.

| $\leftarrow$ | TEMPLATES      |             |               |        |                            |         |           |               |              | 2 |
|--------------|----------------|-------------|---------------|--------|----------------------------|---------|-----------|---------------|--------------|---|
|              | ✓ Search + New | 🐯 Edit List | 📋 Delete      | N Ope  | en in Excel                | Actions | Navigate  | Fewer options | $\mathbb{Y}$ | ≣ |
|              | Tables Setting | × Deletions | 🛱 Deletions I | Matrix | <sup>ព</sup> ិ Deletions E | xecuted | Deletions | History       |              | 궈 |

Figure 27: Deletions Executed

Then, select the last line of the list and click on Actions -> Revert Deletions like in Figure 28.

| $\leftarrow$ | DELETIONS EXCECUTED                                   | √ SAVED | 2  |
|--------------|---|---------|----|
|              | Search 🖬 Open in Excel Actions Navigate Fewer options | Y       | := |
|              | Revert Deletions                                      |         | ᅻ  |

# Figure 28: Revert Deletions

Every time you make a change or deletion of any process the **Client Id** must be introduced.

| Customer Id. | You must put the Customer Id. from Innova | Online Porta | al. |
|--------------|---|--------------|-----|
|              | Customer Id.                              |              |     |
|              |   |              |     |
| Yes No       |   | Yes          | No  |

Also, a change not always can be reverted due to internal functionality of the solution in order to avoid inconsistencies of the data. This constraint is transparent for the user.