INSTALLATION & QUICK SETUP – IN Data Manager

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

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.

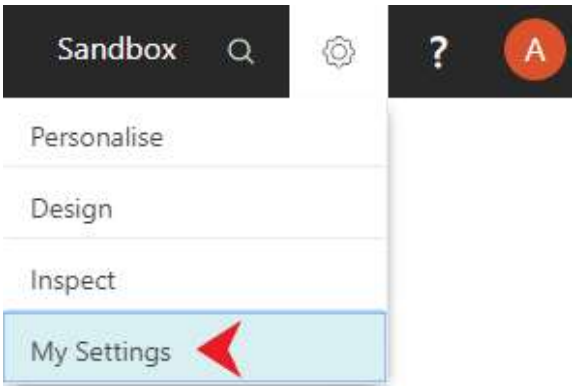


Figure 2: My Settings

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

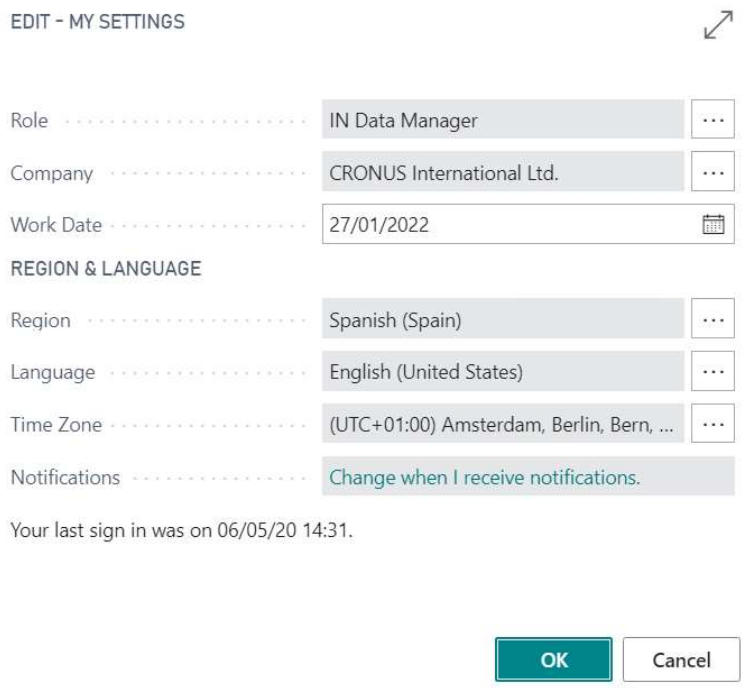


Figure 3: Role Center profile

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.

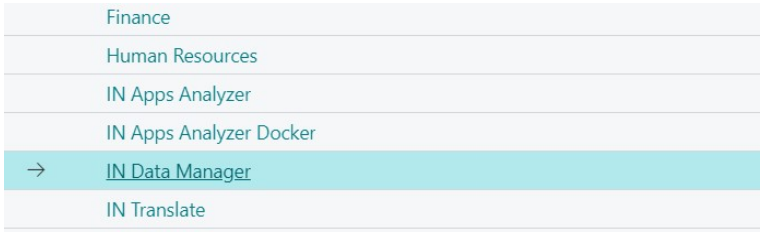


Figure 4: Module selection

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**.

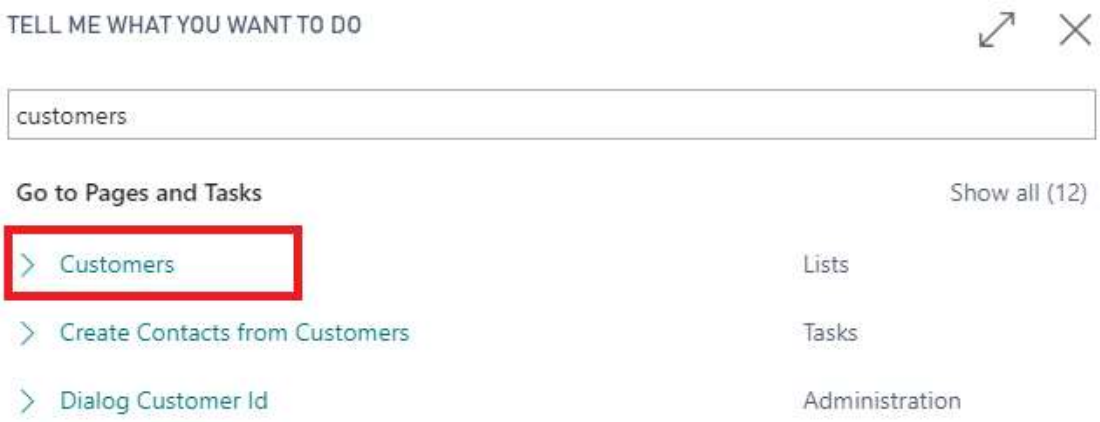


Figure 6: Customer search

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.

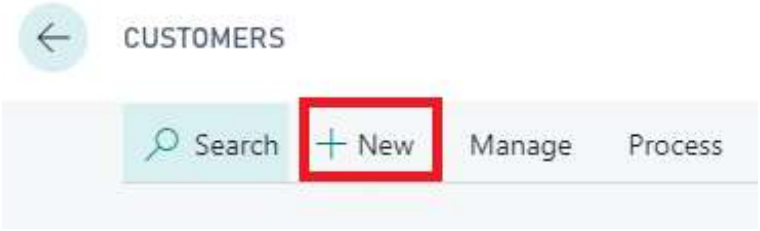


Figure 7: New Client button

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**.



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**.

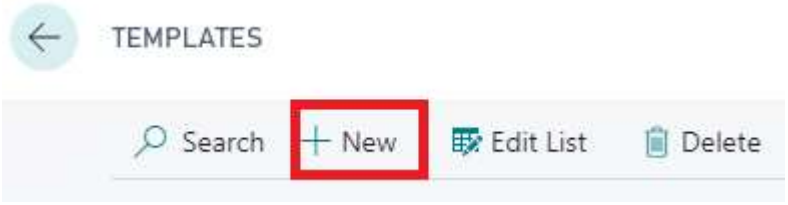


Figure 10: New Changes Template button

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.

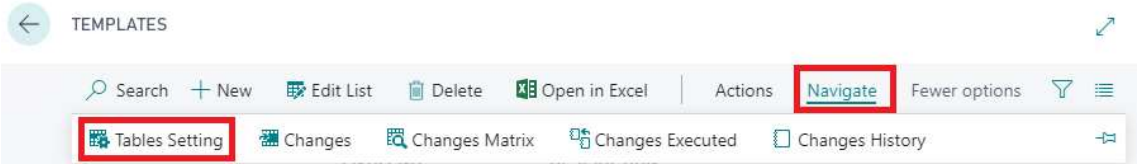


Figure 11: Table Settings

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**.

Tables

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.

Fields

Fields

ENTRY NO.	TABLE LINE NO.	TABLE ID.	TABLE CAPTION	FIELD NO.	FIELD CAPTION
10	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.

Filters

Filters

ENTRY NO.	TABLE 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.

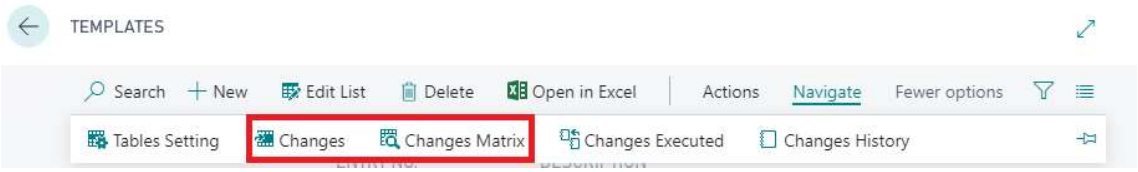


Figure 14: Template options

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**.

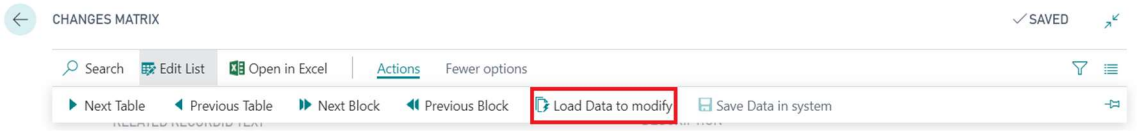
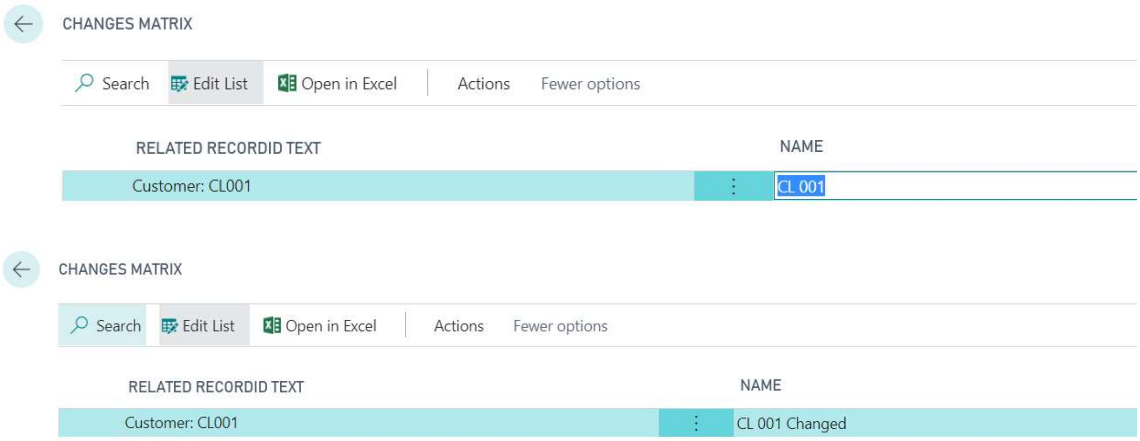


Figure 15: Load Data to modify

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.



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.

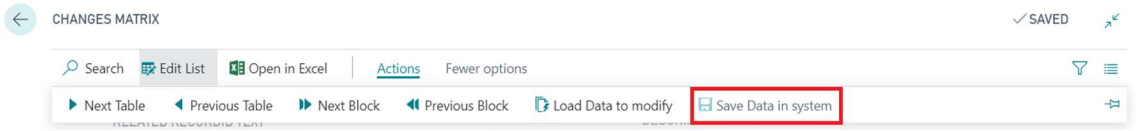


Figure 16: Save Data in system

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**.

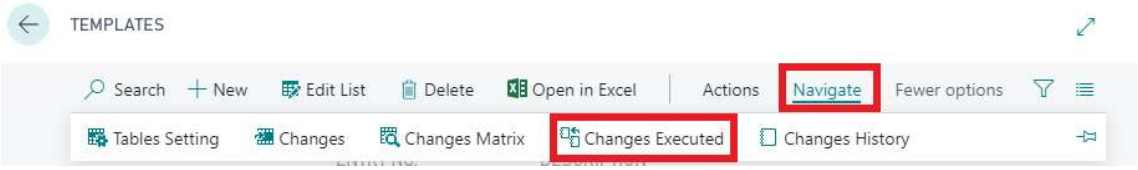


Figure 17: Changes Executed

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

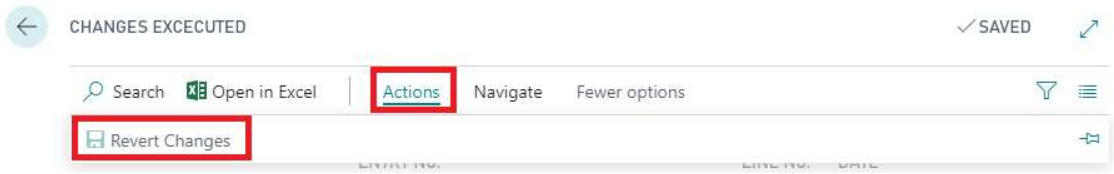


Figure 18: Revert Changes

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**.

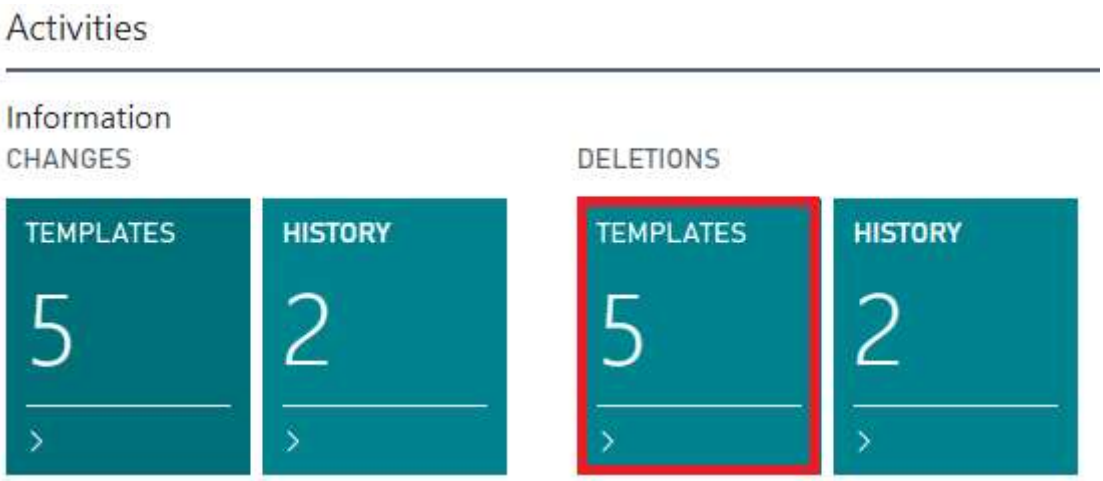


Figure 19: Deletions Templates

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**.

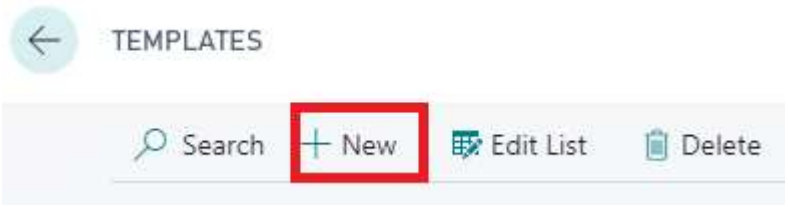


Figure 20: Delete Template

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**.

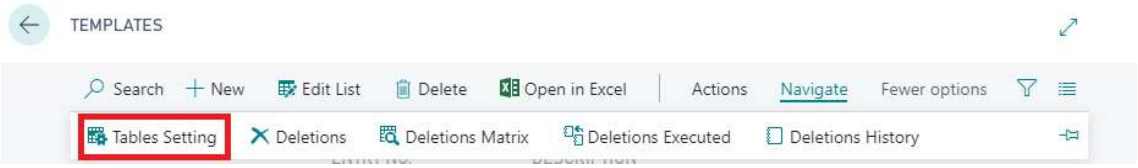


Figure 21: Table Settings

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**.

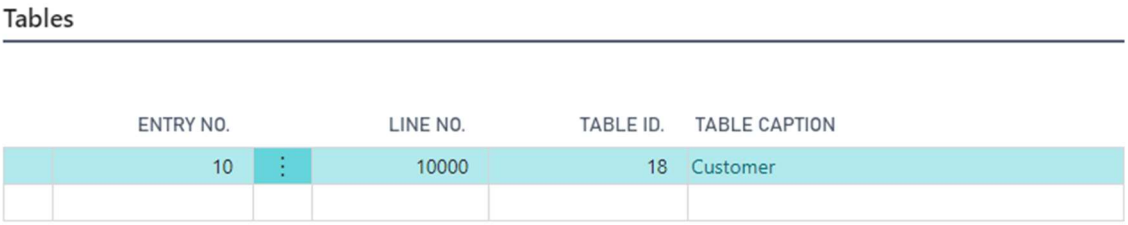


Figure 22: Table Settings

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.

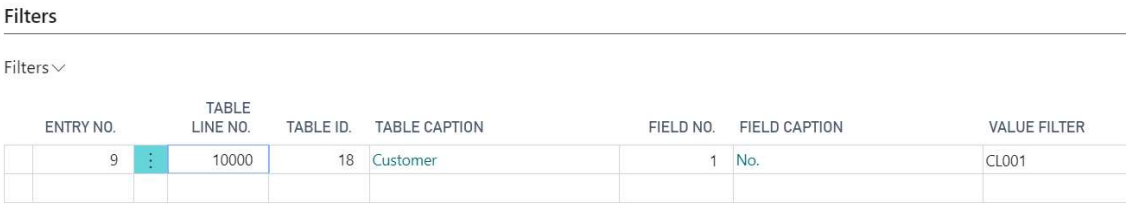


Figure 23: Table filters

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**.

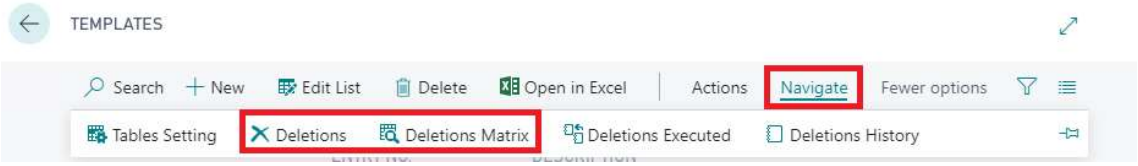


Figure 24: Template options

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**.

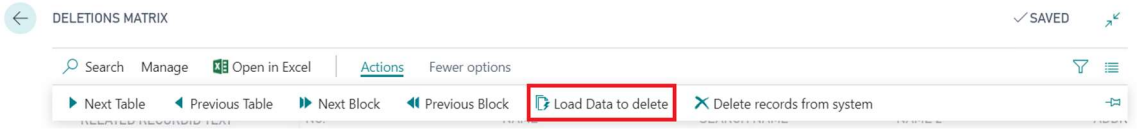


Figure 25: Load Data to delete

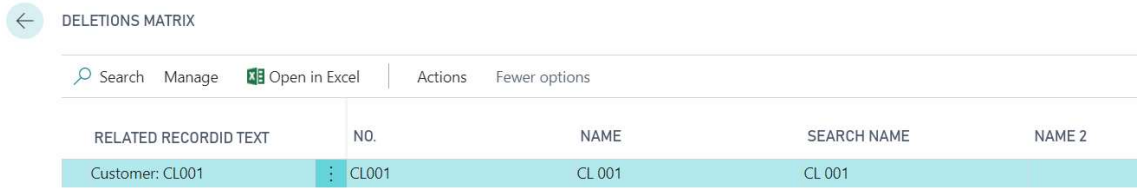


Figure 25.1: Records to delete

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**.

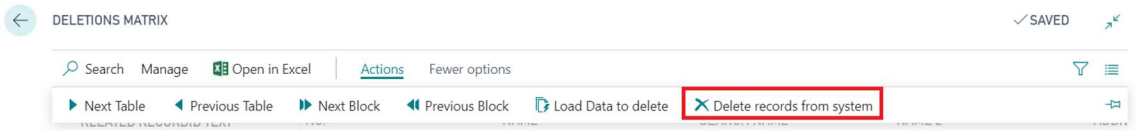


Figure 26: Delete records from system

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**.

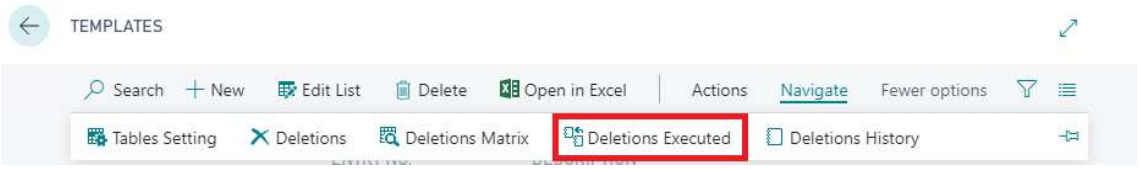


Figure 27: Deletions Executed

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

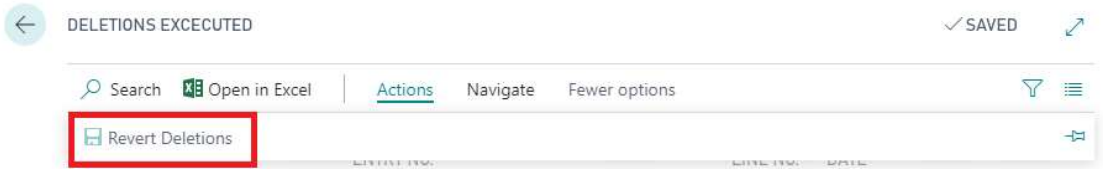


Figure 28: Revert Deletions

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



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.