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# Kinetic Data Customer Conference & User Group

February 24 – 25, 2014

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# Data Management Console

Managing Supporting Data



# Agenda

- What is this Data Management Console?
- What is supporting data?
- How does it work?
- How do I get it?

# What is the Data Management Console

- This data management console is a package that can be used to help support and maintain supporting data for Kinetic Requests, Surveys, and Tasks

**Data Set Selection**

Qualification 1

Qualification 2

Qualification 3

Data Set

[Define a New Data Set](#)

**Data**

Show  entries

State	Abbreviation	Status
Alaska	AK	Active
Alabama	AL	Active

# What is supporting data?

- Service item menus
  - Global
  - Category
  - Specific
- Handler Data
- Customer Data
- Workflow Data
- & more

# Global Menu

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## Data Set Selection

Qualification 1

Qualification 2

Qualification 3

Data Set

[Define a New Data Set](#)

## Data

Show  entries

Search:

State	Abbreviation	Status
Alaska	AK	Active
Alabama	AL	Active
Arkansas	AR	Active
Arizona	AZ	Active
California	CA	Active
Colorado	CO	Active
Connecticut	CT	Active
Delaware	DE	Active
Florida	FL	Active
Georgia	GA	Active

Showing 1 to 10 of 51 entries

# Service Item Specific Menus

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## Data Set Selection

Qualification 1

Qualification 2

Qualification 3

Data Set

[Define a New Data Set](#)

## Data

Show  entries

Search:

Menu Name	Text Menu Label	Text Menu Value	Status
Monitor Sizes	19 in.	19	Active
Monitor Sizes	20 in.	20	Active
Monitor Sizes	17 in.	17	Active
USB Sizes	2 GB	2	Active
USB Sizes	4 GB	4	Active
USB Sizes	8 GB	8	Active
USB Sizes	16 GB	16	Active
Carry Cases	Light-weight	light	Active
Carry Cases	Backpack	backpack	Active
Carry Cases	Rolling Case	rolling	Active

Showing 1 to 10 of 10 entries

# Handler Data

### Data Set Selection

Qualification 1:

Qualification 2:

Qualification 3:

Data Set:

[Define a New Data Set](#)

### Data

Show  entries Search:

Region	Site Name	Site ID	Latest Router Number - Digit 1	Latest Router Number - Digit 2	Status
Northeast	New York	011	2	B	Active
Northeast	Boston	012	1	2	Active
Southeast	Atlanta	021	9	7	Active
Southeast	Orlando	022	4	C	Active
Central	Kansas City	031	2	E	Active
Northwest	Seattle	041	3	A	Active
Southwest	Los Angeles	051	3	8	Active
Central	St Paul	032	8	4	Active

Showing 1 to 8 of 8 entries



# Customer Data

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## Data Set Selection

Qualification 1

Qualification 2

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Data Set

[Define a New Data Set](#)

## Data

[Add Row](#) [Toggle Status](#) [Update Row](#) [File Upload](#) [Save Selected](#) [Save All](#) [Select all](#) [Deselect all](#)

Show  entries

Search:

Customer Name	Address Line 1	Address Line 2	Address Line 3	City	State/Province	Zip/Postal	Country	Discount	Rep	Other	Parent Record Number	Account Owner ID	Status
Calbro Services	123 Main Street	Placeholder for addr line 2		St. Paul	MN	55101	USA	7	Allen	Both	10000	2000	Active
B&M Tool	40 E. Industrial Loop			Midland	TX	79701	USA	8	Allen	PRT	10000	2083	Active
Gunn Oil and Gas Company	811 6th St			Wichita Falls	TX	76301	USA	9	mhowe	BOTH	15000	2084	Active

# Workflow Data



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**Data Set Selection**

Qualification 1:

Qualification 2:

Qualification 3:

Data Set:

[Define a New Data Set](#)

**Data**

Show  entries Search:

Menu Field 1	Menu Field 2	Menu Field 3	Menu Field 4	Type of Fulfillment	Operational Cat 1	Operational Cat 2	Operational Cat 3	Prod Cat 1	Prod Cat 2	Prod Cat 3	Product Name	Workteam Assignment	Work Order Template Name	Impact / WO Priority	Urgency	Status
Internet/Intranet	Connectivity Issue			Incident	Failure	Performance		Hardware	Processing Unit	Desktop	Test desktop	Calbro Services   IT Support   Service Desk		3	3	Active
Internet/Intranet	How To			Work Order	Inquire	Information		Software	Application	Third Party	EP-Internet/Intranet	Calbro Services   IT Support   Service Desk	ITSS Standard Work Order Template	3		Active
Internet/Intranet	Other			Incident	Failure/Error	Connectivity		Software	Application	Third Party	EP-Internet/Intranet	Calbro Services   IT Support   Service Desk		3	3	Active



# & More

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## Data Set Selection

Qualification 1

Qualification 2

Qualification 3

Data Set

[Define a New Data Set](#)

## Data

Show  entries

Search:

Finished or Raw	Part No.	Description	Purchase Unit	Price	Status
FIN	RPBL-0100-MOD60E	1" Reamer Block Lower E	EA	110	Active
FIN	RPBL-0100-MOD60F	1" Reamer Block Lower F	EA	111	Active
FIN	RPBL-0100-MOD60G	1" Reamer Block Lower G	EA	112	Active
FIN	RPBL-0100-ONCOR-A	1" Reamer Block Lower ONC	EA	11322	Active
FIN	RPBL-0100-TR	1" Reamer Block Lower TR	EA	114	Active
FIN	RPBL-0113-MOD60C	1 1/8" Reamer Block Lower C	EA	115	Active
FIN	RPBL-0138-GRANT	1 3/8" Reamer Block Lower	EA	116	Active
FIN	RPBL-0138-MOD60A	1 3/8" Reamer Block Lower A	EA	117	Active
FIN	SB-0858-IR-0271	8 5/8" Deck Bushing	EA	118	Active
RAW	TDCOM-10108-0000-00	Valve Shaft Stainless Steel	EA	127	Active

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# & More

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## Data Set Selection

Qualification 1

Qualification 2

Qualification 3

Data Set

[Define a New Data Set](#)

## Data

Show  entries

Search:

Data Definition Name	Category Level 1	Category Level 2	Category Level 3	Status
Flotek Customer Information	Flotek			Active
Flotek Parts	Flotek	Parts		Active
Flotek Chemicals	Flotek	Chemicals		Active
Data Management Console - Service Item Names for Editing Data	Data Management Console	Configuration Menus		Active
Data Management Console - Data Type Definitions	Data Management Console	Configuration Data	Types	Active
Task Instances - Testing	Data Management Console	Testing		Active
States	Service Item Menu	Global Menu	States	Active
Database Roles	Service Item Menu	Shared Menu	DB Roles	Active
Web Central Quick Ticket	Filter Matrix			Active
Router ID Data	Handler Data	Router ID Data		Active

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# How Does It Work?

- Uses Bridges, Models & Handlers
- Leverages the Kinetic Helper record form (KS\_SRV\_Helper)
- Package supports data stored in Kinetic Helper form (extendible to other forms/systems)
- Allows quick/simple export of data within any dataset
- Allows Row add/update for data stored in Kinetic Helper form (extendible to other forms/systems)
- Allows simple replace or append import of data for datasets data stored in Kinetic Helper form (extendible to other forms/systems)

# Row Add

**Flotek Parts**

Index Field 1	<input type="text" value="Flotek Data"/>
Index Field 2	<input type="text" value="PRT"/>
Finished or Raw	<input type="text" value=""/> <input type="button" value="v"/>
Part No.	<input type="text"/>
Description	<input type="text"/>
Purchase Unit	<input type="text" value=""/> <input type="button" value="v"/>
Price	<input type="text"/>
Status	<input type="text" value="Active"/> <input type="button" value="v"/>

EA = Each, GA = Gallons, LB = Pounds  
Please include the dollar value of the price

# Row Update

Database Roles		
Index 1	<input type="text" value="Service Item Menu"/>	
Index 2	<input type="text" value="Shared Menu"/>	
Index 3	<input type="text" value="DB Roles"/>	
Role Name	<input type="text" value="Public"/>	Role "name" to be displayed to customer
Role	<input type="text" value="everyone"/>	Role "ID" in the database
Status	<input type="text" value="Active"/> ▼	
<input type="button" value="Update Row"/> <input type="button" value="Cancel"/>		

# Export

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## Data Set Selection

Qualification 1

Qualification 2

Qualification 3

Data Set

[Define a New Data Set](#)

## Data

Show  entries

Finished or Raw	Part No.	Description	Purchase Unit	Price	Status
FIN	RPBL-0100-MOD60E	1" Reamer Block Lower E	EA	110	Active
FIN	RPBL-0100-MOD60F	1" Reamer Block Lower F	EA	111	Active
FIN	RPBL-0100-MOD60G	1" Reamer Block Lower G	EA	112	Active
FIN	RPBL-0100-ONCOR-A	1" Reamer Block Lower ONC	EA	113	Active
FIN	RPBL-0100-TR	1" Reamer Block Lower TR	EA	114	Active
FIN	RPBL-0113-MOD60C	1 1/8" Reamer Block Lower C	EA	115	Active
FIN	RPBL-0138-GRANT	1 3/8" Reamer Block Lower	EA	116	Active
FIN	RPBL-0138-MOD60A	1 3/8" Reamer Block Lower A	EA	117	Active
FIN	SB-0858-IR-0271	8 5/8" Deck Bushing	EA	118	Active
RAW	TDCOM-10108-0000-00	Valve Shaft Stainless Steel	EA	127	Active

- Copy
- Print
- CSV
- Excel
- PDF

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# Import

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## Flotek Customer Information

Notes about uploading CSV files:

1. No error checking or duplicate row checking is performed during the upload.
2. No field validation is performed during the upload. Perform all data validation before performing an upload.
3. If a header row is indicated, the first row of data will be ignored.
4. The names used to identify columns in the header row do not matter. The **data** in those columns needs to match the expected data for this data structure.
5. The column order of the data in the CSV is critically important.

The CSV must meet these qualifications:

- **Number of columns:** 17
- **Order of columns:** Index Field 1 | Index Field 2 | Index Field 3 | Customer Name | Address Line 1 | Address Line 2 | Address Line 3 | City | State/Province | Zip/Postal | Country | Discount | Rep | Other | Parent Record Number | Account Owner ID | Status

CSV File (2MB Limit)

File has a header row

Replace ALL existing records

## Notification Info

Email address

# How do I get it?

- <http://community.kineticdata.com>

# What did we discuss?

- What is this Data Management Console?
- What is supporting data?
- How does it work?
- How do I get it?

# Questions?

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