

Global Adjustment: Introduction

SnapTracker Webinar Wenesday

Aug 24, 2016

Meet your webinar hosts



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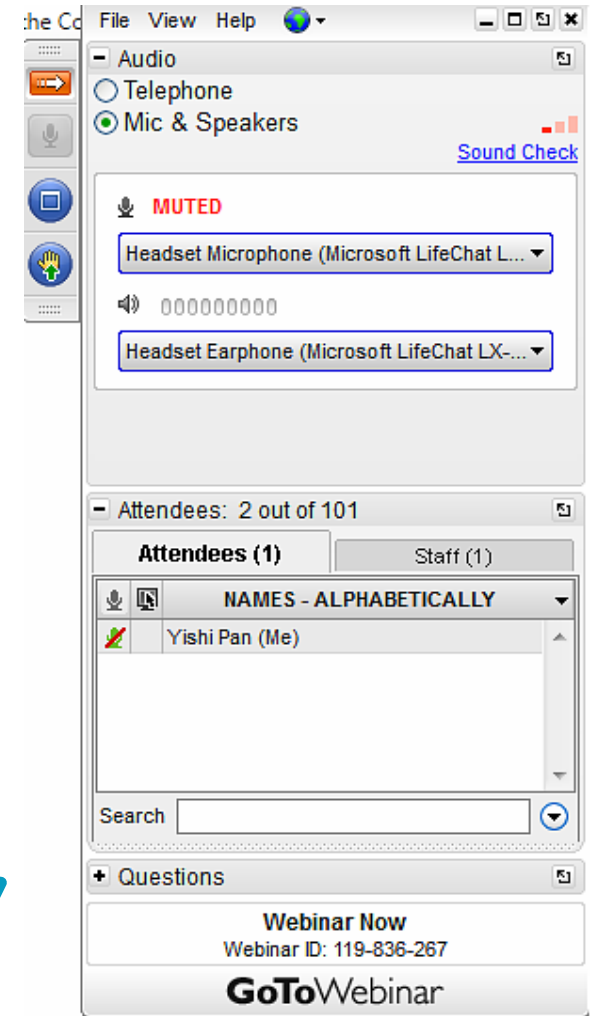
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How to interact today?

Raise your hand-
Let us know if you
have any questions
throughout the
webinar!



Type your comments
and questions here
anytime!



Agenda

- 01 Introduction
- 02 Tables
- 03 Set up & filters
- 04 Create and save template
- 05 Q&A



Global Adjustment

The purpose of the Global Adjustment screen is to enable you to modify a large quantity of records quickly.

Important note: Not all data pulled from the database can be modified.

E.g. In the Item Transaction table, you can modify Adjustment Indicator, Hiding Indicator, Accounting Code etc.

Why do we want to pull records through Global Adjustment?

1

Global Adjustment enables us to update multiple records at one time

2

Global Adjustment enables us to pull data into an Excel spreadsheet.

- Can then be imported into a business system
- Excel allows us to sort and filter the data more effectively

3

Global Adjustment enables us to pull data that we don't normally get access to through inquiries.

- e.g. If we are capturing data at the item level by using User field 1-10 in Add Collection Values, we can retrieve the data using the Item Supplemental table.
- In addition, modifications can be made if errors are identified.

Which Tables can be accessed through Global Adjustment?

- 1** Item
- 2** Item Maintenance
- 3** Item Supplemental
- 4** Item Transaction
- 5** Standard
- 6** Standard Attributes
- 7** Standard Class
- 8** Standard Custom Attributes
- 9** Standard Procurement
- 10** Standard Relation

Set up & Filters

Once you identify which table you are using, you need to select which fields you want to view.

Snap Tracker™
THE POWER TOOL FOR ASSET MANAGEMENT
Home | Change Password | Help | Logout

Home SYSTEM MANA

Request
Inquiry
Movements
PDA Processing
Work Orders
Reports and Analysis
Setup
Utilities
Export Sif
Forward Trial Kit
Maintenance
Change Standard
Damage Maintenance
Global Adjustment
Issue New Serial ...
Transfer Location ...
Edit Item Notes
System Setup
User Setup
File Upload

Global Adjustment

Home > Utilities > Maintenance > Global Adjustment

Select a Table: Standard

Select Fields

Select the fields you would like displayed and in the order you would like to see them on the spreadsheet.

Standard Class	^
Standard Description	
Catalog No	
Catalog Id	
Manufacturer Price List	
List Price	
Default Discount Percentage	v

All

Selected Fields

Company	
Customer No	
Standard	

Select Customer(s): Select One... Add To List

Selected Customer(s)

Remove

These fields are mandatory and cannot be removed or modified.

Select the Customer whose records you'd like to retrieve.

Snap Tracker™ THE POWER TOOL FOR ASSET MANAGEMENT Home | Change Password | Help | Logout

FM
Welcome SYSTEM MANAGER

Request a Service
Inquiry
Movements
PDA Processing
Work Orders
Reports and Analysis
Setup
Utilities
Export Sif
Forward Trial Kit
Maintenance
Change Standard
Damage Maintenance
Global Adjustment
Issue New Serial ...
Transfer Location ...
Edit Item Notes

Global Adjustment

Home > Utilities > Maintenance > Global Adjustment

Select a Table: Standard

Select Fields		Selected Fields
Select the fields you would like displayed and in the order you would like to see them on the spreadsheet.	Catalog Id Manufacturer Price List List Price Default Discount Percentage Default Purchase Price Manufacturer Height	Company Customer No Standard

Select Customer(s): Z - BAR001 - Barker Importers

Add To List

As a **best practice**, do not retrieve or modify data for multiple Customers at a time.

Filters

One of the major components of Global Adjustment is the ability to filter the information you are looking for. Each table has specific information that helps to narrow the focus of your search.

- You can apply multiple filters.

e.g. Select "Item Transaction" table and for the filters, choose "ITT_Trans_Code" (Item Transaction Code) and "ITT_Batch_No" (Batch Number)

Enter any values you would like to filter the items for selection by:

Select Criteria: ITT_Batch_No ▼

Conditions: Equal to ▼

Value: 558

Search

Enter Criteria:

Get Record

Relation: ☒ AND ☐ OR

Add To List

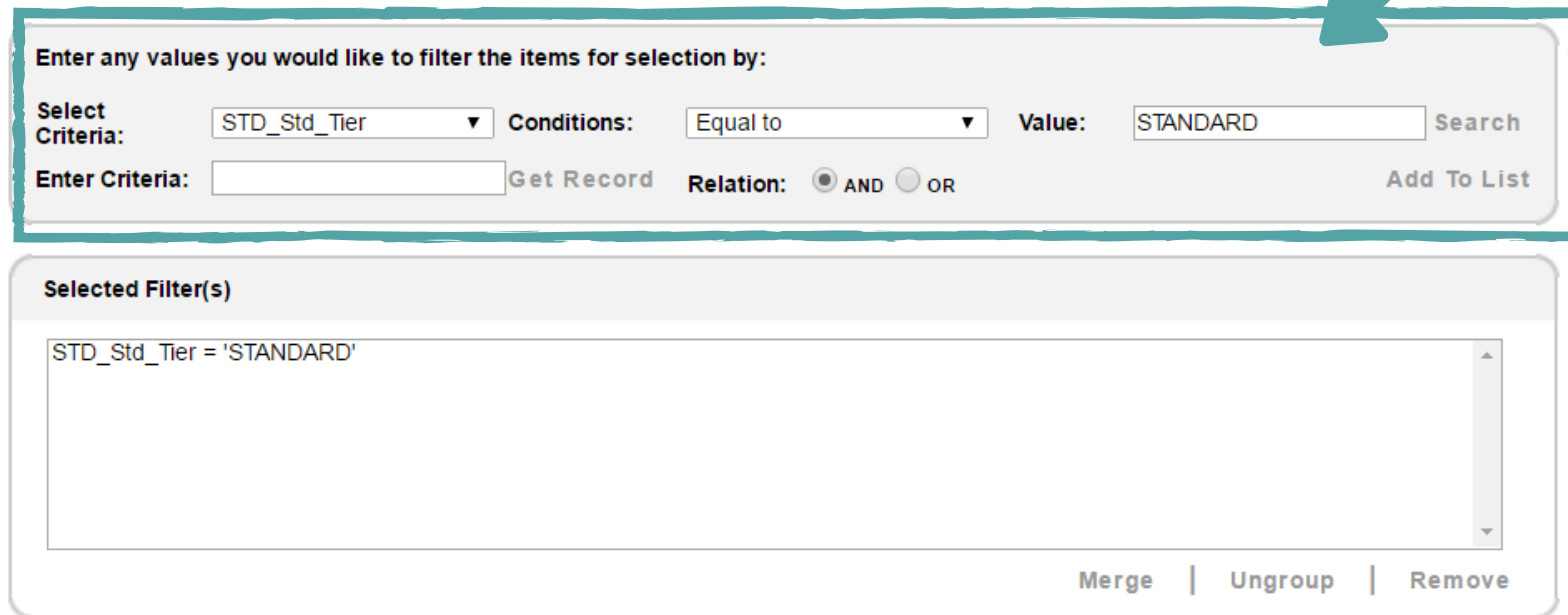
Selected Filter(s)

ITT_Trans_Code = 'AA'
ITT_Batch_No = '558'

Merge | Ungroup | Remove

- When selecting filters, you have to define the **parameters**.

e.g. Choose "Std_Std_tier" **IS EQUAL TO** "Standard"



The screenshot shows a web-based filter configuration interface. At the top, a teal arrow points to the 'Add To List' button. The main configuration area is titled 'Enter any values you would like to filter the items for selection by:'. It contains several input fields: 'Select Criteria:' with a dropdown menu showing 'STD_Std_Tier', 'Conditions:' with a dropdown menu showing 'Equal to', and 'Value:' with a text input field containing 'STANDARD'. There is also a 'Search' button. Below these fields, there is an 'Enter Criteria:' text input field, a 'Get Record' button, and a 'Relation:' section with radio buttons for 'AND' (selected) and 'OR'. To the right of the 'Relation' section is an 'Add To List' button. Below the configuration area is a section titled 'Selected Filter(s)' which contains a text area displaying the filter rule: 'STD_Std_Tier = 'STANDARD''. At the bottom right of this section are three buttons: 'Merge', 'Ungroup', and 'Remove'.

Enter any values you would like to filter the items for selection by:

Select Criteria: Conditions: Value: Search

Enter Criteria: Get Record Relation: ☒ AND ☐ OR Add To List

Selected Filter(s)

STD_Std_Tier = 'STANDARD'

Merge | Ungroup | Remove

- Click View Data to see results.

Global Adjustment Spreadsheet

[Home](#) > [Utilities](#) > [Maintenance](#) > [Global Adjustment](#) > Global Adjustment Spreadsheet

Global Search and Replace

Select a Field: ☐ Match Case
 Search Value: Replace Value: [Replace](#)

Total No. of Records found: 317

Z	BAR001	BKT0003	WORKSURFACE PART	Strd L Tower Bracket	Z6LB
Z	BAR001	BKT0004	WORKSURFACE PART	Worksurface Panel Wall	UNBPAL
Z	BAR001	BKT0005	WORKSURFACE PART	Worksurface Panel Wall	UNBPAP
Z	BAR001	BKT0006	PANEL PARTS	Spine Mounted Storage	WWGT0748
Z	BAR001	BKT0007	WORKSURFACE PART	Worksurface Bkt Kit (Pai	831099
Z	BAR001	BKT0008	PANEL PARTS	Full Height Back Kit, 22"	BB2FBK2236P
Z	BAR001	BKT0009	PANEL PARTS	Full Height Back Kit, 22"	BB2FBK2230P
Z	BAR001	BKT0010	PANEL PARTS	Starter Rail, 81W, for 84'	YBRS81
Z	BAR001	BKT0011	PANEL PARTS	Connector Kit for Above	YBTE
Z	BAR001	BKT0012	PANEL PARTS	Sapper Double Arm Kit, .	SAPMADANTSIDEK
Z	BAR001	BKT0013	PANEL PARTS	Mount Brkt,Convergent,L	ZEBV-0000-PL
Z	BAR001	BKT0014	PANEL PARTS	Unigroup/Tool/Places,Cr	ZEED-1600-CR
Z	BAR001	BKT0015	PANEL PARTS	Mount Brkt,Convergent,L	ZEBV-0000-PR
Z	BAR001	BKT0016	PANEL PARTS	Bracket,Side,For Premis	ZNBA-0000-PR
Z	BAR001	BKT0017	PANEL PARTS	Bracket,Side,For Premis	ZNBA-0000-PL
Z	BAR001	BKT0018	PANEL PARTS	Hinge 38"	HE-38
Z	BAR001	BKT0019	PANEL PARTS	XSITE,WORKSURFACE	36WBSA
Z	BAR001	BKT0020	PANEL PARTS	XSITE,48W,MID-FRAME	36P48MFS
Z	BAR001	BKT0021	PANEL PARTS	XSITE,48W,PANEL MOI	36P48PMT
Z	BAR001	BPI0001	ELECTRICAL	Base Power In-Feed Ca	A879072
Z	BAR001	BPI0002	PANEL PARTS	Base Feed, 8 Wire Isola	WWEBF8T072SMD
Z	BAR001	BPI0003	PANEL PARTS	Base Power In-Feed Ca	A879072

[Reset](#) | [Commit Data](#) | [Export Data](#)

Create & Save Templates

If you pull the same information consistently, you can save time by creating and saving a template.

Load & Save Template

Name : **Load** | **Search** | **Save**

Description :

Reset | **View Data**

Select Template ✕

Search Template Information

Search Templates

Name:

Search | **Close**

7 3 1 - 1 of 1 4 8

Delete	Select	Name 5	Description	Created Date	Last Modified Date
☐	☒	standard		Aug 23 2016 4:45PM	Aug 23 2016 4:45PM

Select | **Delete** | **Close**

Summary : Intro to Global Adjustment

1. Purpose of Global Adjustment

- Global Adjustment is the **best practice method** to modify a large quantity of records in SnapTracker.
- Data can also be exported into an **Excel spreadsheet** for additional review and modification.

2. Tables

- **Only certain tables are available** through Global Adjustment.
- **Not** all tables have fields that can be modified.

3. Set up & Filters

- Narrow the scope of your search using filters.
- You can select **multiple filters**, and you have to define **parameters** when selecting filters.
- As a best practice, do not retrieve or modify data for multiple Customers at a time.

4. Create & Save Templates

- If you pull the same information consistently, you can save time by **creating and saving a template**.

Q&A

Next Webinar Wednesday:

"Global Adjustment Part 2: Exporting Data to Excel"

Don't forget to [fill out the survey](#)
after this webinar!

A modern office interior with large windows and a grid floor. The text is overlaid on a semi-transparent white rectangle.

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Email: SnapTrackerKC@kisp.com if you have
any questions, feedback, requests!

**See you at our next
Webinar Wednesday!**