
Koverse Connections Documentation Documentation

Release 1.0

Koverse Inc

Feb 06, 2020

Contents

| | | |
|----------|-------------------------------------|-----------|
| 1 | Accessing the User Interface | 1 |
| 2 | Search | 3 |
| 3 | Saved Searches | 5 |
| 4 | Lists | 7 |
| 5 | Models | 9 |
| 6 | Object Table | 11 |
| 7 | Administrator Documentation | 13 |

CHAPTER 1

Accessing the User Interface

To log into Koverse Connections

- Navigate your browser to your organizations Koverse Connections URL
- Input your user name and password at the login screen

To log out of Koverse Connections

- Click on your user icon in the upper right portion of the window and select “Log Out”

CHAPTER 2

Search

The search page allows you to search and filter across all the objects in the system.

Clicking on an object type will limit the search results to objects of that type.

Enter some text into the search field and press return to apply the text entered as a filter.

The select boxes in the “Filter By” section are populated with values that are found in the various fields for the chosen object type. Selecting a value will apply it as a filter.

To remove a filter, simply click the “X” next to the property.

You can also click on “CLEAR FILTERS” to remove all currently applied filters.

Clicking on an object in the search results will display an expanded view of that object with its associated view tabs. Each view is customizable by an admin.

You can also:

- *Hide or Show Attributes*
- *Merge Objects*
- *Download a CSV of Objects*
- *Add to List*

CHAPTER 3

Saved Searches

Users can save a search so that they may run it again or share it with other users.

Unlike Lists which contain a static set of objects, saved searches are dynamic. The results of a saved search will change as new objects are added to the system. For example:

1. You perform a search and create a saved search
2. New data is loaded into your Koverse Connections environment after you created a saved search
3. You access the previously created saved search
4. Any new data that was loaded will now appear in your saved search if it matches your criteria.

To create a saved search, first navigate to the Search page and apply one or more filters.

Click on the “SAVE SEARCH” button.

Once you have created a saved search, you can access the saved search on the “Saved Searches” page.

To sort the saved searches, simply click on the column header you want to sort by.

From the drop-down menu on each row you can rename, change the privacy settings, or delete a saved search.

By clicking on a saved search, you will be taken to the search page where you can continue to modify the search criteria and filters. This will not modify the saved search.

Once the filters are changed, clicking “SAVE SEARCH” and naming the search will create a new saved search.

CHAPTER 4

Lists

The Lists page displays all the lists available to the current user. A List is a user-curated list of objects of the same type.

From the Lists page you can see the number of entities contained in each List, the object type in the List, who created the List, when it was last updated, and a toggle to make the List private or public.

From the drop-down menu on each row you can rename, change the privacy settings, or delete a list.

On the Lists page you can sort the Lists by Name, Object Type, Author, Updated Date, and Privacy.

Clicking on a List will take you to the detail page, where you can view the objects contained in that list.

You can also:

- *Hide or Show Attributes*
- *Merge Objects*
- *Download a CSV of Objects*
- *Add to List*

Users can create Models to find and score the objects in the system. There are currently 3 types of Models that can be configured.

5.1 Model Types

Lookalike Models

A Lookalike model is the simplest type of model. Lookalike models use an existing list as a training set and will score all the other objects based on how similar they are to the objects in the training set.

Scoring Models

A Scoring model scores objects based on a linear combination of user defined scores associated with a specific field value pair.

For example, a Scoring model might specify that having the field “Industry” with the value “Finance” increases an object’s score by 50 and having the field “Deal Status” with a value of “Closed” will increase the score by 80. The result being that any object with both of those field/value pairs would have a final score of 130.

Weighted Models

A Weighted model is similar to a Scoring model because it also assigns a score to field/value pairs, but it goes one step further by allowing the user to limit the overall impact of individual fields.

Using the same example given above for Scoring models, the user could choose to limit the impact of the “Industry” field by assigning a weight of 30, and assigning a weight of 70 to the “Deal Status” field.

The weights applied to the fields must add up to 100.

5.2 Create a Model

To create a model, navigate to the Models page and click “CREATE MODEL”:

1. Select the type of model you would like to create and click 'Next'
2. Follow the steps to configure your model. The steps will be different based on the model type that was selected.
3. Name your model. Koverse Connections will show the results of this model in various places throughout the tool so its helpful to name the model in such a way that it explains what its modeling for. For example, names starting with "Similar to Top Customers Last Year" is a good name.
4. Click "SAVE MODEL"

Your model will now appear on the Models page.

5.3 Run a Model

To run a model, navigate to the Models page and click on the model you want to run.

On the detail page for the model, click on "RUN MODEL". You should see a green prompt in the lower left hand corner of your browser window telling you "Model has been queued". This model will then run based on your Koverse Connections system settings.

5.4 Model Options

From the Models page you can click on a model to access more details.

You can sort the models by clicking on the header column you want to sort by. You can also run a model from this page.

From the actions menu drop-down you can: rename, change the privacy settings, or delete a model.

On the details page of a model you can:

- View more information about the model including: Name, who created the model, and when the model was last run
- Make the model private or public using the "Public/Private" toggle
- Run the model
- Rename the model
- See the object results of the model
- Search across the data in the model

The Object Table is used to display a list of objects in various places throughout the application. The Object Table allows you to view the details of each object as well as perform actions across multiple objects.

6.1 Hide or Show Attributes

To hide or show specific attribute columns, click on the eye icon and select or deselect the attribute columns you wish to see.

6.2 Merge Objects

To merge two or more objects, select the object you want to merge and click the “Merge” button. You will be prompted to select the preferred name for this merged object.

6.3 Download a CSV of Objects

To download a CSV of one or more objects, select one or more objects and click the “CSV” button.

6.4 Add to List

To add objects to an existing List, or create a new List, select one or more objects you wish to add to a List and click “Add to List”. You will be prompted to select the List where the objects will be added, you can also type the name of a new list you wish to create. Click “Add” or “Cancel” to finalize your choice.

6.5 Delete

You can use the delete button next to any row to remove it from a list.

6.6 Pagination

At the bottom of the Object Table you can change the number of rows per page displayed (10, 20, 50, or 100).

If there are more rows than can be shown on a single page, you can click on the forward and backward arrows, or click on the page number itself to page through the objects.

7.1 Flags

7.1.1 User Workflow

Flags allow users to call out data inaccuracies. To flag data, from the Search page:

1. Click on an object
2. Click on the “ALL DATA” tab for the object
3. Find the value you want to flag and click on the Flag icon
4. You will be asked to:
 - Give a reason for the flag
 - Add a note (optional)
 - Provide a new value (optional)
5. Click submit

7.1.2 Admin Workflow

In addition to being able to flag data, admins are responsible for reviewing pending flags, approving, dismissing, or editing pending flags for approval.

Navigating the Admin Flags Page

After clicking on the Flags tab you will be brought to a page containing any flags, initially filtered by Pending, sorted by Date. Filter by can be set to “Pending”, “Approved”, or “Dismissed”. Sort by can be set to “Date” or “User”.

Clicking on a flag will open details about that flag including:

- The field that was flagged
- The status of the flag (pending, approved, dismissed)
- Reason for the flag
- Old value for the field

Review Flags

- Click on the pending flag you want to review
- Follow one of the below work-flows depending on the decision to dismiss or approve a flag

There are four cases for an admin reviewing flags:

1. Dismiss a flag (old value remains)
 - Click on “DISMISS FLAG”
 - The flag will now appear under “Filter By Dismissed”
2. Approve a flag with a new user value (old value is removed)
 - Click on “APPROVE FLAG”
 - The flag will now appear under “Filter By Approved”
3. Approve a flag with a new admin value (old value and user value are removed)
 - In the new value text field, type in the value want to replace the user suggested new value. - This removes the old value as well as the value the user suggested when initially flagged.
 - Click on “APPROVE FLAG”
 - The flag will now appear under “Filter By Approved”
4. Approve a flag with a new empty value (old value and user value are removed)
 - In the new value text field, delete the user suggested value (the text field should now be empty). - This removes the old value as well as the value the user suggested when initially flagged, but replaces it with no value, instead of a newly created admin value.
 - Click on “APPROVE FLAG”
 - The flag will now appear under “Filter By Approved”

7.2 Views

Views present the properties of an object. All object types have a default view and may have multiple views. Views can be created and customized by admins.

To create a new view, from the Views page click on “CREATE VIEW”. You will be asked to:

1. Name the View
2. Choose the Object Type the view will apply to
3. Select Fields
 - Drag and drop the available fields to the tier you want them to display.
 - When creating tiers, fields contained in a tier will be grouped and displayed together in the view.

- You can rearrange fields via drag-and-drop within tiers to change their order. The field listed first will be displayed first within the tier.
- You can rearrange tiers via drag-and-drop to change the order in which they appear in the view.
- Clicking on the context menu **••** for a tier allows you to “Rename” or “Delete” a tier.

4. Preview View

- Here you can see the ordering of tiers and fields within tiers for an example object. If you do not like the way tiers or fields are ordered you can go back to the “Select Fields” step.

In the Views tab you can drag-and-drop views for an object to change their priority. This will determine which view is seen first when you open the details of an object, as well as the order of view tabs on the object details page.

From the Views tab you can also edit, copy, or delete a view by clicking on the “ACTIONS” menu on each view.

7.3 Users

From the Users tab, you will see the User Management page. Here you can change an account to a user (if the account is currently an admin) or change an account to an admin (if the account is currently a user), disable or enable an account, and change the password for an account.

7.4 Groups

Groups can be used to give a number of users specific permissions.

Each group can only be assigned permissions for one Object Type.

Assigning groups permissions is useful in cases such as sales territories. For example, a company may have a state field that is used to set up regions:

- West Coast sales group gets permissions for entities with State values WA, OR, or CA
- Rocky Mountains sales group gets permissions for entities with State values ID, MT, WY, CO, AZ, or NM
- A Western Sales VP would be added as a user to both sales groups to be able to view all western states.

7.4.1 Create a Group

To create a group, from the Groups page, click on “CREATE GROUP”.

You will be asked to:

1. Name your group
2. Give your group a description

7.4.2 Group Options

From the Groups page you can click on a group to access more details.

From the actions menu drop down you can: edit a group, copy a group, or delete a group.

On the details page of a group you can:

- View more information about the group including: Name, who created the group, group members, the permissions given to the group (if they already exist)
- Edit the group: name, and description
- Delete the group
- Add or Remove members from the group
- Add permissions (if no permissions exist)
- Edit or Delete permissions (if permissions exist)

Note: these settings may take 30 - 60 minutes before taking effect upon first configuration. Until then, all objects with the object type of the group will be hidden from all users

7.4.3 Additional information

Once a value is assigned to a permission of a group, any values not assigned will not be visible to any other user. This means for all values to be visible, you must assign them to permissions of one or more groups. If you only need a subset of values to be visible, then you only need to assign those values to the groups you create.

If permissions have been assigned to a value, any users not part of the group or groups with permissions for those values will not be able to see any objects that include those values.

To ensure that users can view all objects they should have access to, appropriate users should be added to all appropriate groups that have permissions associated with values of the objects the users should have access to. For example, the Sales Territory groups:

- West Coast sales group gets permissions for objects with State values WA, OR, or CA
- Any user outside sales that needs to view objects with State values WA, OR, or CA, should be added to the West Coast sales group or another group that has permissions associated with values WA, OR, or CA.

7.5 Data Visibility Permissions

7.5.1 Why Use Permissions for Data Visibility

Organizations may need to control data visibility based on groups or departments within their organization. There can be a wide variety of groups or reasons for data visibility, including sales territories and sensitive data.

Permissions allow for an easily controlled and visible definition of data access. Using permissions allows administrators to determine groups that should or should not have access to certain data. Additionally, with the way visibility works in Koverse Connections, organizations that do not need to control data visibility do not need to design elaborate permissions.

Sales Territories

As an example, a US wide sales team may be divided into different territories by state. The northwest territory may be: WA, OR, ID, MT, UT and a corresponding group would be created for that territory and the appropriate users added to it. Similarly a southwest territory may exist with CA, NV, AZ, NM, CO. If Keith is a member of the northwest group, he could only see companies with a presence in WA, OR, ID, MT, UT. However, if Nora is the VP of west coast sales, she would belong to both groups and could see any of the companies in the states assigned to the northwest or southwest territories.

7.5.2 How Visibility Works in Koverse Connections

Concepts of Data Visibility

An underlying assumption in Koverse Connections is that data privacy will be essential for some customers. This requires the ability to limit which data users can see. In Koverse Connections, this is implemented by permissions that are assigned to groups.

The privacy system is designed to be open by default to allow teams that do not require strict privacy restrictions to function efficiently without having to design elaborate permissions. Therefore, if no permissions are defined for an entity type, all entities of that type can be viewed by any user.

7.5.3 Pitfalls of Orphaned Values

When creating permissions groups, there is the potential to create orphaned values. Orphaned values occur when permissions are created on fields, and not all values are assigned permissions.

For example, when creating sales groups: The NW sales group is created with field value visibility for WA, OR, ID, MT, but this time does not include UT. UT is now an orphaned value, and any entity with UT as a field value will not be shown to any users

This potential for orphaned values is essential to consider when creating groups and permissions. If field values are left unassigned, they will never display to any users of the Koverse Connections system.

7.5.4 Current Limitations of Permissions

In KC 1.0, only one permission may be assigned to each group. Each permission specifies a field and a set of values for that field. When a user attempts to view an entity, the system checks to see what permissions are assigned for a user. The user will only be able to see an entity if the values of the field in the entity match the permissions that are assigned to the user.

When creating groups and assigning permissions to those groups, permission changes will not take effect until the data pipeline has been re-run. This means there is lag time between creating permissions and those permissions going into effect.

7.6 Settings

To access the system settings page, navigate to the default url <hostname:port>/settings. Contact your Koverse Connections system administrator for more questions.

- Admin Email
 - This is the administrator email for your Koverse Connections system.
- Koverse URL
 - This is the url where you can find your KISP UI.
 - Eg: server.koverse.com:8080
- Koverse API Token

- The Koverse API Token comes from the KISP Admin tab and is created so that your Koverse Connections system can communicate with your KISP system. For more information see: https://documentation.koverse.com/en/3.0/dev/applications/api_tokens.html
- User Assertions Dataset ID
 - The data set ID associated with your User Assertions data set. This data set ingests values from the UI as users score entities.
- SMTP Host
 - The hostname or IP address to connect to.
- SMTP Port
 - The port your SMTP connection will use. Set to 465 if you will use a secure connection. Set to 587 or 25 if you will not use a secure connection.
- SMTP secure connection (TLS)
 - This checkbox enables a TLS encrypted SMTP connection.
 - If you choose to use a TLS encrypted connection (TLS secure option set to true), your SMTP connection will use port 465.
 - If you choose to not use a secure TLS encrypted connection (TLS secure option set to false), your SMTP connection will use port 587 or 25.
- SMTP User
 - Your SMTP username
- SMTP Password
 - Your SMTP password
- From Email Address
 - This is the email address that your Koverse Connections system will use to send notifications such as lookalike and scoring models being run.

7.7 Release Notes

7.7.1 1.0.0 Alpha

Koverse Connections 1.0.0 Alpha includes the ability for users and administrators to get started consolidating information about objects, searching for specific objects, creating lists, and creating two types of predictive models: Scoring Models for ranking objects by specific features, and LookAlike Models for ranking objects by their similarity to other known interesting objects.

Features

- [KX-658] - Users can create and manage Lists of objects
- [KX-663] - Users can create and manage Scoring Models
- [KX-664] - Users can flag specific data elements for administrator review
- [KX-252] - Users can registrater
- [KX-255] - Users can change their password

- [KX-682] - Users can query on scores and searchable fields
- [KX-313] - Users can receive email notifications
- [KX-181] - Users can create Lookalike Models
- [KX-303] - Users can save searches
- [KX-248] - Administrators can manage users
- [KX-300] - Administrators can review data that has been flagged
- [KX-256] - Administrators can change a user's password
- [KX-257] - Administrators can assign users to security groups
- [KX-144] - Administrators can configure settings

Bug Fixes

- [KX-733] - Fix Lookalike Model stack overflow
- [KX-745] - Fix for night mode
- [KX-746] - Fix for changing password
- [KX-747] - Fix CSV download
- [KX-748] - Prevent extra submit in search
- [KX-749] - Fix for assigning scores in Scoring model
- [KX-750] - Fix create Lookalike Model cancel button
- [KX-763] - Refactored metadata transform to run more efficiently
- [KX-765] - Fix Scoring Model transform error when encountering string in predominantly numeric column

7.7.2 1.0.0 Beta 1

Koverse Connections 1.0.0 Beta 1 introduces a new type of model: Weighted Models

Features

- [KX-741] - Extract entities from nested data
- [KX-752] - Weighted Models

Improvements

- [KX-761] - Design combined create/edit model flow

Bug Fixes

- [KX-792] - Spacing on numeric range Fields in Scores/Weights panels for model creation
- [KX-793] - Update theme colors
- [KX-796] - update navigation drawer

- [KX-797] - Use navigation tabs on profile views page instead of buttons
- [KX-798] - add pie chart to entity type counts
- [KX-799] - add colors to entity type chips
- [KX-800] - Make navigation responsive
- [KX-801] - update page titles to match navigation
- [KX-802] - update banners on model and list detail pages
- [KX-803] - Update entity detail layout
- [KX-804] - Switch to select box in Merge Dialog
- [KX-808] - responsiveness to ungraceful break points
- [KX-809] - spacing on groups table
- [KX-810] - Spacing on Search Form fields for when second row is required
- [KX-815] - Truncate long text in entity table
- [KX-823] - Use brand orange in logo
- [KX-671] - Test all Lists features
- [KX-787] - UI improve unit test coverage

7.7.3 1.0.0 Beta 2

Koverse Connections 1.0.0 - Beta 2

Features & Improvements

- [KX-830] - Support flexible auto-complete for fields
- [KX-892] - Consolidate headlines and hydration steps
- [KX-895] - Connections administrator needs to unmerge automatically merged objects
- [KX-944] - Consolidate backend model classes

Bug Fixes

- [KX-903] - Fix unmerging
- [KX-933] - Consolidated transform is not handling security groups correctly
- [KX-935] - CreateHeadlines runs out of memory
- [KX-940] - GatherStats transform returns empty data set
- [KX-945] - Process models are sometimes not being marked as 'done'
- [KX-952] - Ensure a model error doesn't cause consolidated transform to fail
- [KX-956] - Weighted models come back with 0 results
- [KX-971] - Convert hashSet in metadata record to a list
- [KX-973] - Ensure user assertions of only the type being processed are included in consolidated transform
- [KX-1064] - Merging and unmerging more than two objects at once not working as intended

- [KX-1065] - Exclude all environmental configuration files from release artifacts
- [KX-1066] - Correct headlines and settings operation
- [KX-1067] - Object counts were based off object datasets with only “reverse of”