

The screenshot displays the KYNECTION software interface. On the left is a sidebar menu with options: Dashboard, Drafts (30), Today (0), Inbox (0), All Forms (244), Favourites, CONFIGURE, Templates (110), Options, Archive, and Help. The main area shows a form titled 'Incident / Injury / Near Miss 57' dated '28 Jul 2025 17:14'. The form includes fields for 'Created by' (Ky Admin), 'Project' (Kynection), 'Date/Time Occurred' (28 Jul 2025 17:14), 'Reported By' (Ky Admin), 'Division' (Employees), 'Phone Number' (04892581), and 'Incident Address' (Seaford, Australia). Below these are sections for 'General Job Info' (Project: Kynection, Client: Kynection) and 'Incident Details' (Outcome: Environmental Impact). A note at the top of the form states: 'All Near Misses / Hazards / Accidents / Incidents / Injuries / Or Dangerous Occurrences MUST Be Reported As Soon As Possible. If The Incident Is Notifiable To Regulator Form. Provide As Much Detail As You Can, However Only Record The Facts. Take Photos Of The Incident Scene For Inclusion In The Investigation Which Will Be Conducted As Supporting Evidence In Accordance With AS 1885.1.'



KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION • KIM WELCOME • PART 3

Manage Forms, Records *and Data Exports*

Working with the records behind the dashboard: form status filters and the archive, incident and near-miss reviews, finding duplicate contacts, and exporting data without breaking it.

4 CHAPTERS

2 MIN 19 SEC

KIM WELCOME

WEB USERS • MANAGERS

FEATURE GUIDE • 2 MIN 19 SEC

What this feature covers

Four stages, eight steps: forms and the archive, incident records, duplicates and visibility, then exporting.

CH 01	Forms and the archive Every form, filtered by where it has got to.	00:00–00:28
CH 02	Incident records Safety records sit in the same list.	00:28–00:43
CH 03	Duplicates and visibility Clean data, and understanding what you are allowed to see.	00:43–01:50
CH 04	Exporting data Getting data out, ready to work on.	01:50–02:18

- **The ID column is the join.** On any export you intend to re-import, leave the ID column exactly as it is.
- **Archived is not deleted.** Archived forms remain searchable, which matters when someone asks for a record from two years ago.
- **Duplicates are found, not prevented.** Run the duplicate check periodically rather than assuming the data is clean.

READ AS Screens are captured from the walkthrough video at the timestamp shown on each step. Company names, policy numbers and dollar values are demonstration data.

Forms and the archive

Every form, filtered by where it has got to.

Group	Template	Name	Linked To	Status	Created By	Date
☐ Job Workflow	Client Job Docket - Project	CJD-195	2025-000131	Approved		1 Aug 2025
☐ Job Workflow	Client Job Docket - Project	CJD-194	Roger Sweetey	Draft		1 Aug 2025
☐ CoRk	End Shift Declarations	7238	Roger Sweetey	Review Incident		1 Aug 2025
☐ Job Workflow	Driver Pre-Start Declaration	10	Roger Sweetey	Submitted		1 Aug 2025
☐ Safety	Incident Investigation	49	Investigation of 49	Verification & Closure		1 Aug 2025
☐ Safety	Incident Investigation	43	Investigation of 43	Submitted	Ky Admin	1 Aug 2025
☐ Safety	Incident Investigation	45	Investigation of 45	Submitted	Ky Admin	31 Jul 2025
☐ Safety	Incident / Injury / Near Miss	50	Hexum	Submitted	Ky Admin	31 Jul 2025
☐ Safety	Incident / Injury / Near Miss	49	SavorPath	Review Incident	Ky Admin	31 Jul 2025
☐ Safety	Incident / Injury / Near Miss	48	Ledgarline	Review Incident	Ky Admin	31 Jul 2025
☐ Safety	Incident Investigation	47	Investigation of 47	Submitted	Ky Admin	31 Jul 2025
☐ Safety	Incident / Injury / Near Miss	47	SavorPath	Submitted	Ky Admin	31 Jul 2025
☐ Safety	Toolbox Talk Form	7	Echaverse	Submitted	Ky Admin	29 Jul 2025
☐ Safety	Toolbox Talk Form	6	Voltspire	Submitted	Ky Admin	29 Jul 2025
☐ Safety	Toolbox Talk Form	4	Starfounder	Submitted	Ky Admin	29 Jul 2025

STEP 1 • 00:07 IN THE VIDEO

Filter by status

All Forms carries status filters so you can see what is draft, submitted or complete.

CHAPTER 01 • STEP 1 OF 2

Search Archive

From: 15/07/2025 To: 05/08/2025

Name:

Created by:

Template: Incident / Injury / Near Miss

Search

STEP 2 • 00:21 IN THE VIDEO

Search the archive

Archived forms remain searchable rather than being removed.

CHAPTER 01 • STEP 2 OF 2

Incident records

Safety records sit in the same list.

Dashboard

Drafts

Today

Inbox

All Forms

Favourites

CONFIGURE

Templates

Options

Archive

Help

30

0

0

244

110

Restore

Search

28 Jul 2025 17:14

Incident / Injury / Near Miss 57

Created by

Ky Admin, 28 Jul 2025 17:14

Project

Kynection

All Near Misses / Hazards / Accidents / Incidents / Injuries / Or Dangerous Occurrences MUST Be Reported As Soon As Possible. If The Incident Is Notifiable To Regulator / Form. Provide As Much Detail As You Can, However Only Record The Facts. Take Photos Of The Incident Scene For Inclusion In The Investigation Which Will Be Conducted As Supporting Evidence In Accordance With AS 1885.1.

Date/Time Occurred

28 Jul 2025 17:14

Reported By

Ky Admin

Division

Employees

Phone Number

04892581

Incident Address

Seaford, Australia

General Job Info

Project

Kynection

Client

Kynection

Incident Details

Outcome

Environmental Impact

Incident Description: (What happened? Facts only)

test

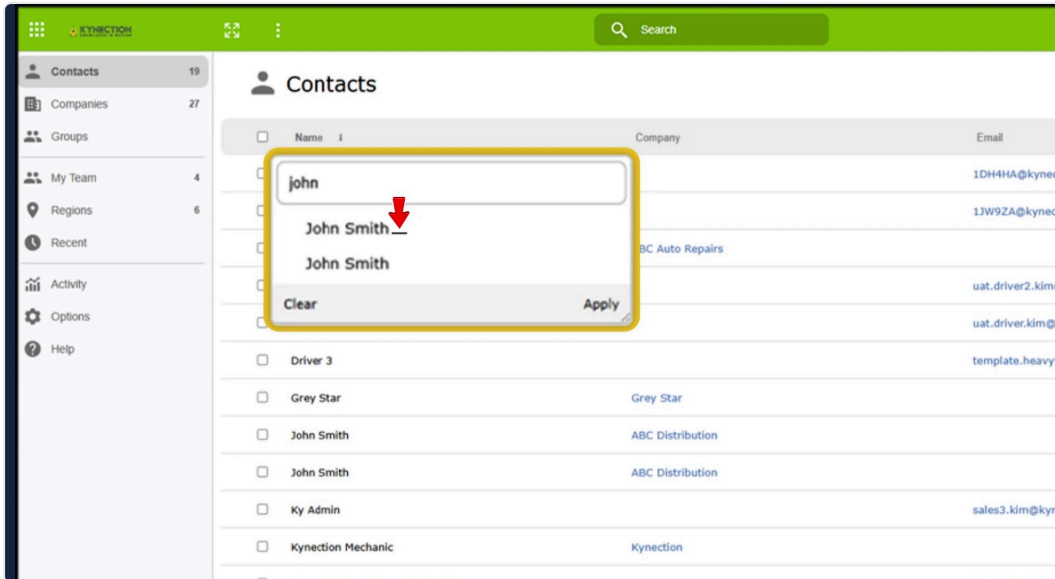
STEP 1 • 00:35 IN THE VIDEO

Review incidents and near-misses

Incident, injury and near-miss records are reviewed from the forms list with the rest.

Duplicates and visibility

Clean data, and understanding what you are allowed to see.

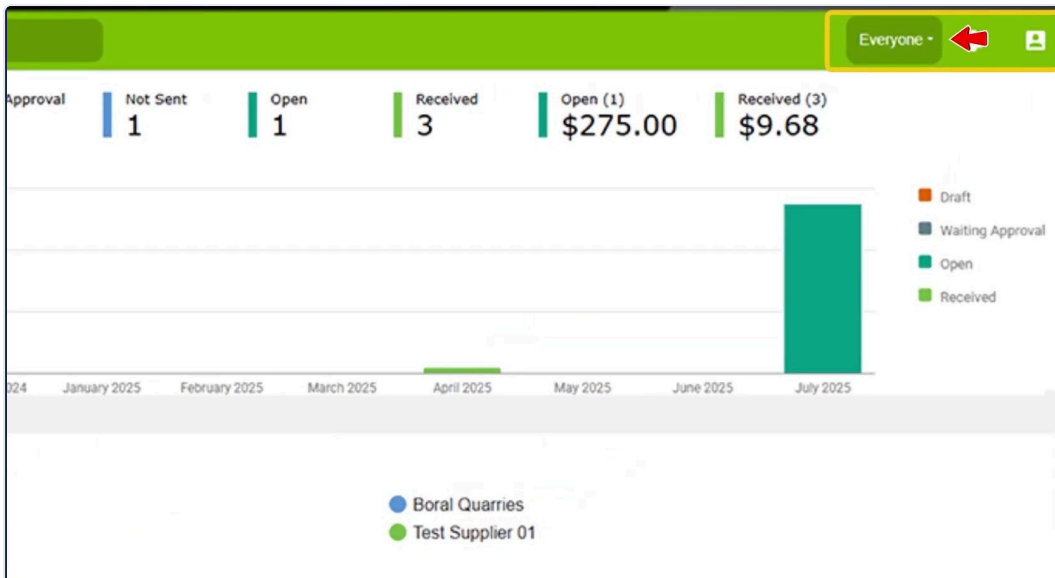


STEP 1 • 00:55 IN THE VIDEO

Find possible duplicates

The duplicate check surfaces contacts that look like the same person or company entered twice.

CHAPTER 03 • STEP 1 OF 3



STEP 2 • 01:19 IN THE VIDEO

Check record visibility

What appears on your dashboard depends on your access level and the views you have been given.

CHAPTER 03 • STEP 2 OF 3

Duplicates and visibility

Search

Everyone

	Company	Start Date	End Date	Percent Complete	Quote No.
	Kynection	11 Jun 2025	11 Jul 2025	0	Q-00035
novals	John Holland Group	27 Nov 2024	27 Dec 2024	0	QUO-00036 test
ect	CYP (Cross Yarra Partnership)	18 Feb 2025	18 Mar 2025	0	No Quote
PROJECT WEST TUNNEL	Kynection	9 Jul 2025	8 Aug 2025	0	QUO-00049
p	CPB Contractors	18 Mar 2025	17 Apr 2025	0	QUO-00038

STEP 3 • 01:39 IN THE VIDEO

Use the project views

Project and operational views present the same records organised for different jobs.

Exporting data

Getting data out, ready to work on.

Export Example

id	product	company	base price	sales Tax	discount	base cost	project	role	minquantity	maxquantity	in
4E1905639868402E8E097F84E2E991	14mm Aggregate	Kynecton	115	10		0	Kynecton		0	0	
6807E48F3176506AA1F937885D0EC	Additional Maintenance Item	Kynecton	100	10		100	Kynecton		0	0	
D49C9B4680C0B0B57F8337CD7E57	Air Filter Inner - K127260K	Kynecton	50	10		40	Kynecton		0	0	
0629C7917876F8384BCAE308567FCA	Air Filter Primary - P535770	Kynecton	60	10		48	Kynecton		0	0	
148D643C67C995ECF50377715CB8E	Brake Light	Kynecton	250	10		200	Kynecton		0	0	
089F49F8064419a4c473a7558aF840	Cancellation fee	Kynecton	100	10		80	Kynecton		0	0	
420F30593114197883e465b43c991	Compressor	Kynecton	500	10		400	Kynecton		0	0	
1315DEF8BC728385BCDACSFC7C36721	Coolant	Kynecton	40	10		32	Kynecton		0	0	
3074E97FA03D03535858AA38CBF8	Counter-jib	Kynecton	50	10		40	Kynecton		0	0	
1A00C3975C2228CAF9896490F62B9	Counterweight	Kynecton	50	10		40	Kynecton		0	0	
60E73FEFF85F303515CDAC479882	Differential oil	Kynecton	40	10		32	Kynecton		0	0	
A0E27CD36DE3C72411C2CF182381F	Drive Axle Oil	Kynecton	45	10		36	Kynecton		0	0	
DDCBA7677167F8B0B7A7EC8721160	Drums	Kynecton	80	10		64	Kynecton		0	0	
509168268F018C950459885665F1E	Engine Oil - TO-TOW4D	Kynecton	50	10		40	Kynecton		0	0	
8E338DE7ED56DA0A20E48600CF3	Engine Oil Filter - C1031	Kynecton	46	10		37	Kynecton		0	0	
5688FA027EAB170AF6E1012261E2CD	Filter	Kynecton	49	10		39	Kynecton		0	0	
AFC7619588817F48D49F78D748276	Foundation	Kynecton	600	10		480	Kynecton		0	0	
46ACD0514F4A408AC125482642A3	Frames	Kynecton	800	10		640	Kynecton		0	0	
3F6C83AC6A7A635C434502A9B548F	Fuel Filter - P550012	Kynecton	65	10		52	Kynecton		0	0	
F32FC71C81580318095A8642E665	Fuel Water Separator Element	Kynecton	80	10		64	Kynecton		0	0	
373F5C66789717841F25A9B3353810	Grease	Kynecton	75	10		60	Kynecton		0	0	
73380E7ED56DA0A20E48600CF3	Headlight - Adhoc	Kynecton	95	10		76	Kynecton		0	0	
252FD0A8598508F1E84DE09F8045D6	Hoist	Kynecton	250	10		200	Kynecton		0	0	
00635D0FBA0C09D0978318317CF10	Mudflap - Adhoc	Kynecton	75	10		60	Kynecton		0	0	
ASC821E27D0935353C2683518C0420	Oil Filter	Kynecton	25	10		20	Kynecton		0	0	
3F1878E0862EA3A3902A158DE0A18	Operator Cab	Kynecton	2600	10		2080	Kynecton		0	0	
56C1E7995713FA488B03E3A26383	Pallets	Kynecton	65	10		52	Kynecton		0	0	
4E1905639868402E8E097F84E2E991	14mm Aggregate	Jacks Wholesale	115	10		92	Eclipse		0	0	
6807E48F3176506AA1F937885D0EC	Additional Maintenance Item	Jacks Wholesale	100	10		80	Eclipse		0	0	
D49C9B4680C0B0B57F8337CD7E57	Air Filter Inner - K127260K	Jacks Wholesale	50	10		40	Eclipse		0	0	

STEP 1 • 02:01 IN THE VIDEO

Export the records

Kynecton data exports for editing outside the system.

CHAPTER 04 • STEP 1 OF 2

Export Example

id	product	company	base price	sales Tax	discount	base cost	project	role	minquantity	maxquantity	inventoryname	description	warehouse	sales code	purchase code	time code
4E1905639868402E8E097F84E2E991	14mm Aggregate	Kynecton	115	10		0	Kynecton		0	0						
6807E48F3176506AA1F937885D0EC	Additional Maintenance Item	Kynecton	100	10		100	Kynecton		0	0						
D49C9B4680C0B0B57F8337CD7E57	Air Filter Inner - K127260K	Kynecton	50	10		40	Kynecton		0	0						
0629C7917876F8384BCAE308567FCA	Air Filter Primary - P535770	Kynecton	60	10		48	Kynecton		0	0						
148D643C67C995ECF50377715CB8E	Brake Light	Kynecton	250	10		200	Kynecton		0	0						
089F49F8064419a4c473a7558aF840	Cancellation fee	Kynecton	100	10		80	Kynecton		0	0						
420F30593114197883e465b43c991	Compressor	Kynecton	500	10		400	Kynecton		0	0						
1315DEF8BC728385BCDACSFC7C36721	Coolant	Kynecton	40	10		32	Kynecton		0	0						
3074E97FA03D03535858AA38CBF8	Counter-jib	Kynecton	50	10		40	Kynecton		0	0						
1A00C3975C2228CAF9896490F62B9	Counterweight	Kynecton	50	10		40	Kynecton		0	0						
60E73FEFF85F303515CDAC479882	Differential oil	Kynecton	40	10		32	Kynecton		0	0						
A0E27CD36DE3C72411C2CF182381F	Drive Axle Oil	Kynecton	45	10		36	Kynecton		0	0						
DDCBA7677167F8B0B7A7EC8721160	Drums	Kynecton	80	10		64	Kynecton		0	0						
509168268F018C950459885665F1E	Engine Oil - TO-TOW4D	Kynecton	50	10		40	Kynecton		0	0						
8E338DE7ED56DA0A20E48600CF3	Engine Oil Filter - C1031	Kynecton	46	10		37	Kynecton		0	0						
5688FA027EAB170AF6E1012261E2CD	Filter	Kynecton	49	10		39	Kynecton		0	0						
AFC7619588817F48D49F78D748276	Foundation	Kynecton	600	10		480	Kynecton		0	0						
46ACD0514F4A408AC125482642A3	Frames	Kynecton	800	10		640	Kynecton		0	0						
3F6C83AC6A7A635C434502A9B548F	Fuel Filter - P550012	Kynecton	65	10		52	Kynecton		0	0						
F32FC71C81580318095A8642E665	Fuel Water Separator Element	Kynecton	80	10		64	Kynecton		0	0						
373F5C66789717841F25A9B3353810	Grease	Kynecton	75	10		60	Kynecton		0	0						
73380E7ED56DA0A20E48600CF3	Headlight - Adhoc	Kynecton	95	10		76	Kynecton		0	0						
252FD0A8598508F1E84DE09F8045D6	Hoist	Kynecton	250	10		200	Kynecton		0	0						
00635D0FBA0C09D0978318317CF10	Mudflap - Adhoc	Kynecton	75	10		60	Kynecton		0	0						
ASC821E27D0935353C2683518C0420	Oil Filter	Kynecton	25	10		20	Kynecton		0	0						
3F1878E0862EA3A3902A158DE0A18	Operator Cab	Kynecton	2600	10		2080	Kynecton		0	0						
56C1E7995713FA488B03E3A26383	Pallets	Kynecton	65	10		52	Kynecton		0	0						
4E1905639868402E8E097F84E2E991	14mm Aggregate	Jacks Wholesale	115	10		92	Eclipse		0	0						
6807E48F3176506AA1F937885D0EC	Additional Maintenance Item	Jacks Wholesale	100	10		80	Eclipse		0	0						
D49C9B4680C0B0B57F8337CD7E57	Air Filter Inner - K127260K	Jacks Wholesale	50	10		40	Eclipse		0	0						
0629C7917876F8384BCAE308567FCA	Air Filter Primary - P535770	Jacks Wholesale	60	10		48	Eclipse		0	0						
148D643C67C995ECF50377715CB8E	Brake Light	Jacks Wholesale	250	10		200	Eclipse		0	0						

STEP 2 • 02:13 IN THE VIDEO

Protect the ID column

The ID column matches each row back to its record. Change it and the re-import creates duplicates instead of updating.

CHAPTER 04 • STEP 2 OF 2

NEXT

Where to go next

This guide covers one part of the module. The rest of the series covers it end to end.

NEXT UP - KIM 04

Import data and submit a support request

BACK TO KIM 02

Navigate access, contacts and forms

THE REST OF THE KIM SERIES

Ask your Kynecton account manager for the other guides in this series

MORE IN THIS MODULE

KIM 01 Use Kynecton as a manager user (module overview)

KIM 02 Navigate access, contacts and forms

KIM 04 Import data and submit a support request
