Syniti Source Relevancy Solution Accelerator

Installation, Configuration & User Guide

Document History

Version	Comments	Date
1.0	Initial release	April 19, 2021

Contents

Overview

From Stewardship Tier version 7.4.3 onwards, the Source Relevancy pages detailed in this guide will be installed automatically. These new pages will not be automatically installed on Stewardship Tier instances that are being upgraded to version 7.4.3 or above. Instead, a Source Relevancy Solution Pack that includes the Source Relevancy pages can be requested from Syniti Support by raising a support ticket and requesting the 'SourceRelevancySolutionPack.zip'.

IMPORTANT! The Source Relevancy pages are installed in the DataConstruction webapp. This webapp is a custom, client owned application that gives customers the opportunity to make changes to standard delivered Source Relevancy pages to support their specific requirements. These changes will not be overwritten during an upgraded of the Stewardship Tier.

Install Source Relevancy

The Source Relevancy Solution Pack can be installed on Stewardship Tier versions 7.1.4 and above. Before proceeding with this installation, the user performing the installation should check whether the Source Relevancy pages already exist within the Construct webapp.

Perform the following steps to download and install the Source Relevancy:

1. Download Source Relevancy Solution Pack

   - Raise a support ticket at https://support.syniti.com requesting the Source Relevancy Solution Pack

   - Syniti support will provide a download link from where the Solution Pack should be downloaded

   - Download the Solution Pack onto the Stewardship Tier Application Server

2. Install Source Relevancy Solution Pack

   - Navigate to the downloaded file (**SourceRelevancy.zip)** and go to **Properties**. Ensure to unblock the file if it is blocked.

   - Right click on **SourceRelevancy.zip** and go to **Properties**. Ensure to unblock the file if it is blocked.

   - Unzip the file

   - Navigate to the DSP Installation folder (e.g. D:\BOA\DSP or C:\Program Files (x86)\BOA\DSP)

- Back up the DSP Install\BOA\DSP folder to a compressed zip file

- Back up all Syniti-supplied SQL Server databases or verify that a complete recent backup already exists

  o Supplied databases: AutoGen, cMap, cMap_Data, cMass, cMass_Data, Console, CranPort, CranSoft, DataConstructionServer, DataDialysis, DataGarage, DBMoto_Client, DGE, DGE_Data, dgReports, dgSAP, dspAddOn, DSPCommon, dspMonitor_AccPak, dspMonitorConfig, DSW, IGC, Integrate, IntegrateStaging, InterfaceServer, MC, & RADToolkit

- Stop IIS

This process disconnects all active DSP users, so it is highly recommended to perform the install when no users are on the system. This process stops IIS on the web server.

  o Open Windows *Start* Menu.

  o Open the **Command Prompt** (run as an administrator).

  o Type: **IISReset –stop**.

  o Press the **Enter** key.

  o Leave the Command Prompt window open for later use.

- Stop all services that start with "Cransoft Service …"

This process stops all DSP background jobs, so it is highly recommended to perform the install when no scheduled operations are running on the system.

  o Open Windows *Start* Menu.

  o Select **Administrative Tools**.

  o Run **Services**.

  o Right-click the DSP service.

  o Select **Stop**.

  o Repeat the previous two steps for any additional DSP services.

- If present (not all packs have this folder), copy the **Web** folder from the zip file to your existing DSP install\Web folder. If prompted, replace the files in the destination.

- Copy the **Databases** folder from the zip file to your existing DSP install\Databases folder. If prompted, REPLACE the files in the destination.

- Navigate to DSP install\Databases and execute file **SourceRelevancyInstall.bat** (run as an administrator)

- Start all services that start with "Cransoft Service …"

- o Open Windows *Start* Menu.

- o Select **Administrative Tools**.

- o Run **Services**.

- o Locate the DSP service(s).

- o Right-click the DSP service.

- o Select **Start**.

- o Repeat the previous two steps for any additional DSP services.

- ▪ Start IIS

  - o Open Windows *Start* Menu.

  - o Open the **Command Prompt** (run as an administrator).

  - o Type: **IISReset –start**.

  - o Press the **Enter** key.

Configure Access to Source Relevancy Pages

User Security

Access to the Source Relevancy pages is controlled by 3 different WebApp Groups within the Construct WebApp:

- • RelevancyPowerUser

- • RelevancyUser

- • RelevancyReadOnly

To grant users access to the pages, these WebApp Groups should be assigned to existing roles or new roles should be created and then users assigned to these roles.

The details of access provided by each WebApp Group is defined below.

RelevancyPowerUser

PAGE ID ▼	ALLOW SELECT	ALLOW INSERT	ALLOW UPDATE	ALLOW DELETE
Construct : Relevancy Group Values	✔	✔	✔	✔
Construct : Relevancy Groups	✔	✔	✔	✔
Construct : Relevancy Operands	✔	✔	✔	✔
Construct : Relevancy Override	✔	✔	✔	✔
Construct : Relevancy Report	✔	✔	✔	✔
Construct : Source Relevancy	✔	✔	✔	✔

RelevancyUser

PAGE ID ▼	ALLOW SELECT	ALLOW INSERT	ALLOW UPDATE	ALLOW DELETE
Construct : Relevancy Group Values	✔	✔	✔	✔
Construct : Relevancy Override	✔	✔	✔	✔
Construct : Relevancy Report	✔	✔	✔	✔
Construct : Source Relevancy	✔	☐	✔	☐

RelevancyReadOnly

PAGE ID ▼	ALLOW SELECT	ALLOW INSERT	ALLOW UPDATE	ALLOW DELETE
Construct : Relevancy Group Values	✔	☐	☐	☐
Construct : Relevancy Override	✔	☐	☐	☐
Construct : Relevancy Report	✔	✔	✔	✔
Construct : Source Relevancy	✔	☐	☐	☐

Navigating to Source Relevancy Pages

Users with access to one of the specified WebApp Groups will be able to access the Source Relevancy pages by navigating to the Construct WebApp via the horizontal toolbar within the Advanced Data Migration solution.
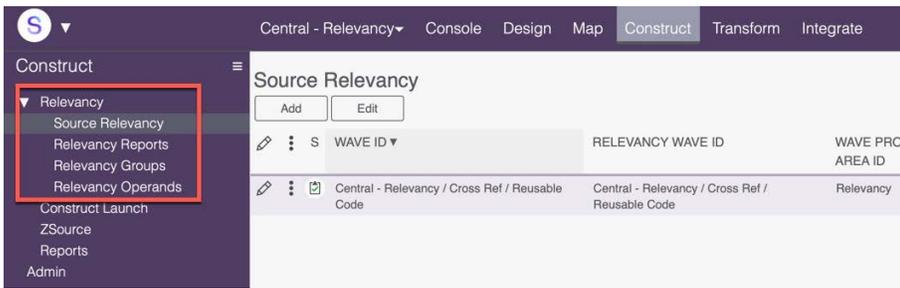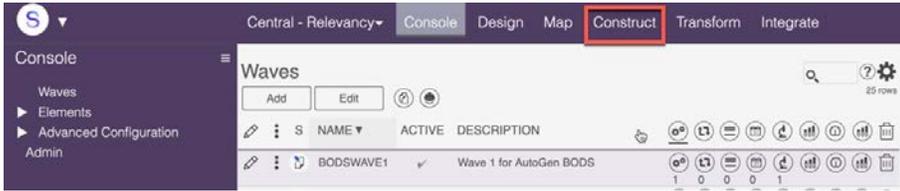
The Source Relevancy pages include security controls that ensure that users with access to the pages are only able to maintain relevancy rules for the Waves in which they have access to.

From a Stewardship Tier security point of view, this access is based upon the Roles that a user has been given access to and the Security Definition Key Values that are assigned to those roles.

In the Example 1 below, a user assigned to this role would have access to maintain relevancy rules for the MASTER_S4 Wave as they would be assigned to a role in specific 2 object belonging to the MASTER_S4 Wave are assigned

Example 1

In the Example 2 below, a user assigned to this role would have access to maintain relevancy rules for all Waves as they would be assigned to a role that been assigned to Access All Data.

Source Relevancy Pages Overview

Page 'Relevancy Groups'

The Relevancy Groups pages is used to create groups which at the Wave / Source level (Relevancy Group Values page) can then have specific values assigned to indicate whether records with the value is Included or Excluded from the migration scope.
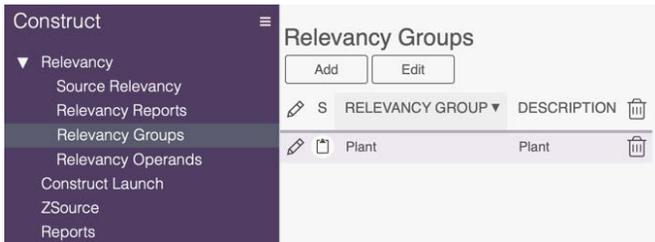
The Relevancy Groups can be found in table **DataConstruction.dbo.ztRelevancyOrgUnitType**.

Page 'Relevancy Operands'

The Relevancy Operands page is used to create Operators that are available on the Relevancy Override page. By default, "Exclude" and "Include" are provided. Additional operands can be added as needed to support project requirements
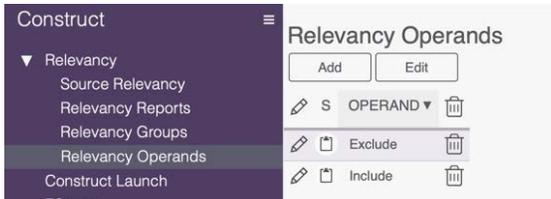
The Relevancy Operands can be found in table **DataConstruction.dbo.ztRelevancyOperand**.

Page 'Source Relevancy'

The Source Relevancy page is where users register the Waves and Sources for which relevancy criteria will be specified.

The definition of the fields on the horizontal view are below: -

Wave ID	This is the deployment Wave to which the documented relevancy rules belong to.
Relevancy Wave ID	This is the Wave in which the relevancy rules are implemented. There may be project scenarios whereby the relevant data set is defined in one relevancy wave and then each deployment wave uses these results.
Wave Process Area ID	This is the process area in the Relevancy Wave ID in which the relevancy rules are implemented.
zSource	This is the Source System to which the relevancy rules apply.

The definition of the fields on the vertical view are below: -

General Tab

Primary Language	Primary language that is being used. This is used to identify relevant textual information
Client	Client number that the relevancy pertains to and is used as the first rule to set the relevant flag
Last Client Refresh	
Vendor_InterCompany	Identifier for Intercompany Vendor records
Customer_InterCompany	Identifier for Intercompany Customer records
BOM Explosion Limit	Number of recursive calls to be made to gather all subsequent component materials
Relevancy Group Type	Indicates whether records with Relevancy Group Values are either to be Excluded or Included from the dataset.
Copy from Source	Use to copy configuration from another zSource

New Days Tab

The "**New Days**" tab is used to identify the characteristics that will be utilized to identify an object that remains in scope, even without activity, if it falls within the "new days" calculations.

Note that you can only define New <u>Days</u> OR New <u>Date,</u> you cannot use both.
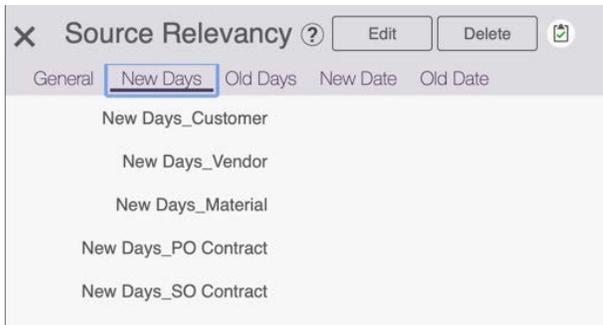
New Days_Customer	Number of days (considering refresh date) after entry date that a Customer is still considered a new Customer and should be included in the migration scope regardless of whether there is any transactional history.
New Days_Vendor	Number of days (considering refresh date) after entry date that a Vendor is still considered a new Vendor and should be included in the migration scope regardless of whether there is any transactional history.
New Days_Material	Number of days (considering refresh date) after entry date that a Material is still considered a new Material and should be included in the migration scope regardless of whether there is any transactional history.
New Days_PO Contract	Number of days (considering refresh date) after entry date that a Purchase Contract is still considered a new Purchase Contract and should be included in the migration scope regardless of whether there is any transactional history.
New Days_SO Contract	Number of days (considering refresh date) after entry date that a Sales Contract is still considered a new Sales Contract and should be included in the migration scope regardless of whether there is any transactional history.

Old DaysTab

The "**Old Days**" tab is used to identify the timeframe, in days, that will be utilized to identify records that will fall out of scope due to their age. Once transactions or items reach the days from the refresh date (defined on the "General" tab), the object falls out of scope unless specifically overridden.

Note: Users can only define Old <u>Days</u> OR Old <u>Date</u>, you cannot use both.
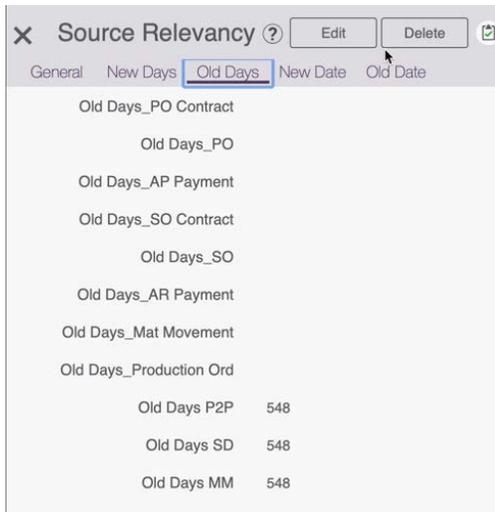
Vendor Relevant Parameters

Old Days_PO Contract	Number of days (considering refresh date) after document creation that the record is considered part of the relevant determination of Vendor
Old Days_PO	Number of days (considering refresh date) after document creation that the record is considered part of the relevant determination of Vendor
Old Days_AP Payment	Number of days (considering refresh date) after clearing date that the record is considered part of the relevant determination of Vendor
Old Days P2P	Flexible field to be used as required.

Customer Relevant Parameters

Old Days_SO Contract	Number of days (considering refresh date) after document creation that the record is considered part of the relevant determination of Customer
Old Days_SO	Number of days (considering refresh date) after document creation the record is considered part of the relevant determination of Customer
Old Days_AR Payment	Number of days (considering refresh date) after clearing date that the record is considered part of the relevant determination of Customer
Old Days SD	Flexible field to be used as required.

Material Relevant Parameters

Old Days_MatMovement	Number of days (considering refresh date) after material document date that the record is considered part of the relevant determination of Material
Old Days_ProductionOrder	Number of days (considering refresh date) after completed of a Production Order that the record is considered part of the relevant determination of Material
Old Days MM	Flexible field to be used as required.

New Date Tab

The "**New Date**" tab is used to identify the timeframe, based on a specific date, that will be utilized to identify records that will remain in scope regardless of the activity for that record. The fields are similar as used to define "NewDays" above.

Note: Users can only define New <u>Days</u> OR New <u>Date</u>, you cannot use both.
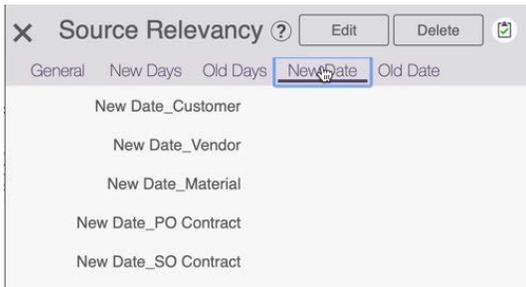
New Date_Customer	The date less than or equal to the entry date when a Customer is still considered a new Customer and subsequent transactional relevant requirements do not apply
New Date_Vendor	The date less than or equal to the entry date when a Vendor is still considered a new Vendor and subsequent transactional relevant requirements do not apply
New Date_Material	The date less than or equal to the entry date when a Material is still considered a new material and subsequent transactional relevant requirements do not apply
New Date_PO Contract	The date less than or equal to the entry date when a Purchasing contract is still considered new and subsequent transactional relevant requirements do not apply
New Date_SO Contract	The date less than or equal to the entry date when a Sales Order contract is still considered new and subsequent transactional relevant requirements do not apply

Old Date Tab

The "**Old Date**" tab is used to identify the timeframe, based on a specific date, that will be utilized to identify records that will fall out of scope due to their age. If activity occurs prior to the specified date, the item falls out of scope unless specifically overridden. The fields used are similar to those above on "Old Days".

Note: Users can only define Old <u>Days</u> OR Old <u>Date</u>, you cannot use both.
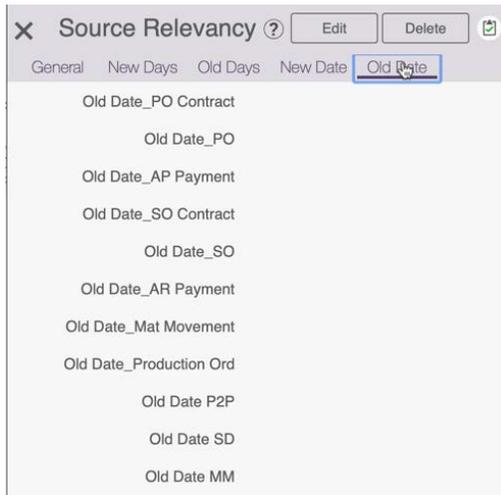
Vendor Relevant Parameters

Old Date_PO Contract	The date from which PO Contracts are considered part of the relevant determination of Vendor
Old Date_PO	The date from which Purchases Orders are considered part of the relevant determination of Vendor
Old Date_AP Payment	The date from which Account Payables Records are considered part of the relevant determination of Vendor
Old Date P2P	Flexible field to be used as required.

Customer Relevant Parameters

Old Date_SO Contract	The date from which Sales Contracts are considered part of the relevant determination of Customer

Old Date_SO	from which Sales Orders are considered part of the relevant determination of Customer
Old Date_AR Payment	The date from which Accounts Receivable records are considered part of the relevant determination of Customer
Old Date SD	Flexible field to be used as required.

Material Relevant Parameters

Old Date_MatMovement	The date from which Material Movement records are considered part of the relevant determination of Material
Old Date_ProductionOrder	The date from which Production / Process Orders are considered part of the relevant determination of Material
Old Date MM	Flexible field to be used as required.

The parameters defined on the Source Relevancy pages can be found in table **DataConstruction.dbo.dcsSourceRelevancy**.

Page 'Relevancy Group Values'

The Relevancy Group Values page is where users specify which values for each 'Relevancy Group' are to be either **Included** or **Excluded** from the dataset that is relevant for migration. The Relevancy Groups allowed here were configured in "Relevancy Group" page.

To maintain Relevancy Group Values, click Relevancy Group Values Icon [icon] on the SourceRelevancy record.

This data is stored in table **DataConstructionServer.dbo.dcsSourceRelevancyOrgUnit.**

Page 'Relevancy Override

The Relevancy Override page is where users can define specific records to be included or excluded from the relevant migration dataset.

The maintain Relevancy Override records, click the Override Icon on the SourceRelevancy record

Following are some examples for reference:

Each entry can be flagged as Active or not.

The data for Overrides is stored in table **DataContructionServer.dbo.dcsRelevancyOverride**.

Page 'Relevancy Reports

The Relevancy Reports page shows all the Transform Target Reports related to the Relevancy Wave(s)/ Process Area(s) registered on the Source Relevancy page.

The reports can be accessed by clicking the 'Relevancy Report' option in the relevancy menu.