

Syniti Solutions psaAddress

Installation, Configuration & User Guide

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Overview

psaAddress is designed to assist users in address cleansing. It contains generic tables that can be adapted to any address cleansing solution. It also contains a user interface allowing users to view the changes to the address, approve or unapprove them and make additional changes.

Key Features:

- Relevancy solution included
- Comes configured for Data Services or Melissa Data
- Generic Tables that can easily adapt to the address cleansing solution of your choice
- Simple user interface for address review, approval and modification
- Final address data exported to be used by downstream waves

Prerequisites

PsaPerformanceBench needs to be installed prior to psaAddress installation. Refer to psaPerformanceBench Application Guide for install details.

Install psaAddress

The application can be installed on Syniti Solutions DSP versions 7.0.1 and above

Download the Application & License

The psaAddress application and/or license are obtained by opening a support ticket at support.syniti.com.

Perform the following steps to retrieve the necessary information for a license request:

1. On the DSP application server, locate the Hardware Identifier program (called "**HardwareIdentifier.exe**") included in a zip file along with the DSP installation software and documentation previously downloaded from Syniti.
2. Open the program.
3. Click **Generate**.
4. Copy the automatically generated ID and collect the following additional information. All information below pertains to the application server running DSP; no information is needed regarding the database server:
 - a. Hardware ID (as mentioned above)
 - b. Windows computer name
 - c. Number of processor cores (as shown in the Task Manager CPU tab)
 - d. Usage of the DSP instance, as in, DEV, TEST (or QA) or PROD
5. Syniti Licensing will deliver the license file via the support ticket.

Install the License

Perform the following steps to install the license:

1. Log in to the DSP site as an Administrator.
2. Select **Admin > Configuration > Product Licenses** in the Navigation pane.
3. Click the Upload a file icon in the **FILE NAME** column next to the Upload a New Product License link.
4. Locate the license file that was provided by Syniti Licensing.
5. Click **Open**.
6. Verify the license is uploaded.
 - a. **NOTE:** If the Navigation pane does not display all the licensed components as expected, use the browser refresh button or the F5 key to refresh the screen. At this point the full vertical menu will appear.

Install the Application

Perform the following steps to install the application:

- 1) Right click on **psaAddresss.zip** and go to **Properties**. Ensure to unblock the file if it is blocked.
- 2) Unzip the file
- 3) Navigate to the DSP Installation folder (e.g. D:\BOA\DSP or C:\Program Files (x86)\BOA\DSP)
- 4) Back up the DSP Install\BOA\DSP folder to a compressed zip file
- 5) Back up all Syniti-supplied SQL Server databases or verify that a complete recent backup already exists
 - a) 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
- 6) 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.

 - a) Open Windows *Start* Menu.
 - b) Open the **Command Prompt** (run as an administrator).
 - c) Type: **IISReset -stop**.
 - d) Press the **Enter** key.
 - e) Leave the Command Prompt window open for later use.
- 7) 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.

- a) Open Windows *Start* Menu.
 - b) Select **Administrative Tools**.
 - c) Run **Services**.
 - d) Right-click the DSP service.
 - e) Select **Stop**.
 - f) Repeat the previous two steps for any additional DSP services.
- 8) Copy the **Web** folder from the zip file to your existing DSP install\Web folder. If prompted, replace the files in the destination.
- 9) Copy the **Databases** folder from the zip file to your existing DSP install\Databases folder. If prompted, replace the files in the destination. (Note – when copying the Databases\Apps folder do not replace files in that folder)
- 10) Navigate to DSP install\Databases and execute file **psaAddress_Install.bat** (run as an administrator)
- 11) Start all services that start with “Cransoft Service ...”
- a) Open Windows *Start* Menu.
 - b) Select **Administrative Tools**.
 - c) Run **Services**.
 - d) Locate the DSP service(s).
 - e) Right-click the DSP service.
 - f) Select **Start**.
 - g) Repeat the previous two steps for any additional DSP services.
- 12) Start IIS
- a) Open Windows *Start* Menu.
 - b) Open the **Command Prompt** (run as an administrator).
 - c) Type: **IISReset -start**.
 - d) Press the **Enter** key.

Configure psaAddress

psaAddress comes pre-configured with default values in the configuration tables, but they will require modification per specific client needs.

- 1) If the Navigation pane in DSP doesn't show psaAddress, then try these steps:
 1. Log in to the DSP site as an Administrator.
 2. Select **Admin > Configuration > Product License** in the Navigation pane.

- a. Ensure that psaAddress appears here.
3. Select **Admin > Configuration > Site Menu** in the Navigation pane.
 - a. Ensure that psaAddress appears here. If not, then:
 - i. Click **Add**.
 - ii. Enter a priority in the **PRIORITY** field.
 - iii. Enter **psaAddress** as the label for the site menu option in the **LABEL** field.
 - iv. Select the **psaAddress : psaAddress** page from the **LINK TO PAGE ID** list box.
4. Select **Admin > Configuration > Parameters** in the Navigation pane.
 - a. Click **Clear Cache**.
 - b. Reload the browser tab.

If you still can't reach the psaAddress application, then review the "Define Security Roles" article in the DSP Online Help to ensure that your DSP user has access to psaAddress. The DSP Online Help is accessible from the question mark icon in the top-right corner of all DSP pages. You can also open a ticket at support.syniti.com for assistance.

Security Configuration.

Prior to users being able to login and view data in psaAddress, security must be configured. psaAddress uses the ObjectID to control what users have access to view. In order to provision a user access to an ObjectID the following steps must be completed.

1. Navigate to the DSP Admin -> Security page.
2. Expand the security menu -> Expand the Security Defintions menu
3. Select Security Roles
4. Click the keys icon for the Security Role group you wish to provision access (Eg Migration Developer)
5. Click the Keys icon for the 'psaAddress Object Roles' security definition
6. Add the Objects relevant for that groupign (Eg Customer/Vendor/Business Partner)

Transform

Navigate to Transform -> Central Wave and map your data to it's valid source table (eg ttCustomerGeneral). Validate relevancy rules

- 1) Process Central Wave validate that ttBusinessPartner_Relevant is populated
- 2) Process Address Cleanse Wave validate ttGenericAddressInput table is popuated

User Guide

This user guide will walk you through psaAddress pages and functionality.

Purpose

The primary goal of psaAddress is to create a single cohesive application that can provide all necessary address cleansing and approval activities.

Getting Started

Request Access to the DSP system with access to the psaAddress webapp.

Log into the DSP and navigate to the psaAddress webapp (Using the site menu).

psaAddress – General Address Construct

The General Address Construct page allows for manual creation of addresses that do not exist in a legacy system. Users can manually enter new address records and include them in address verification.

CONSTRUCT ID	ADDRESS NAME	ADDRESS LINE 1	ADDRESS LINE 2	DISTRICT	CITY	REGION	POSTAL CODE	COUNTRY	ADDED BY	ADDED ON	CHANGED BY	CHANGED ON
1	Company ABC	16655 Woodberry Ct			BRKF	WI	53045	US			DRichardson	10/5/2020
2	B Ltd.	7050 OLD HWY 70			TOWN OF ST. GERMAIN		54521	US			YLI	12/23/2019
3	C Enterprise	5750 BOU AVE	UNIT 1605		ROCKVILLE		20852	US			YLI	12/23/2019
4	Institution D	2815 Jeffries Ave			Los Angeles		90065	US			YLI	12/23/2019
5	E Clinic	816 SARAH ST			Pittsburgh	PA	15223	US			YLI	12/23/2019

psaAddress Summary

SOURCE	SOURCE ADDRESSES	SERVICE VERIFIED	APPROVED	NOT APPROVED	ERROR	WARNINGS
DCS	10	10	1	4	0	0
SAP_ECC_Cust	13883	13883	13807	75	147	0
SAP_ECC_Vend	2822	2822	2822	0	0	0

The psaAddress summary screen displays a summary of all Address data split out by Source. This gives a good overall status of the progress of the address cleansing initiative.

Address Review

The screenshot shows two main sections: 'Original Address' and 'Suggested Address'.

Original Address Table:

KEY	APPROVAL	INCL. IN NEXT VERIFICATION	OVERWRITE ADDRESS	ADDRESS NAME	ADDRESS LINE	ADDRESS LINE 2	DISTRICT	CITY	REGION	POSTAL CODE	COUNTRY
DCS-DCS-DCS-1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Company ABC	18655 Woodberry Ct		BRKF		WI	53045	US
DCS-DCS-DCS-2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	B Ltd.	7050 NewGlen HWY 70		TWN OF ST. GERMISOWN-OF-ST. GERMAIN			545244	US
DCS-DCS-DCS-3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C Enterprise							
DCS-DCS-DCS-4	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Institution D	2815 Jeffries Ave		Los Angeles			90065-1553	USA
DCS-DCS-DCS-5	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	E Clinic	816 SARAH ST		Pittsburgh		PA	15223	US

Suggested Address Table:

RESPONSE ID	VERIFICATION SERVICE	SOURCE DATA LAST CHANGED	VERIFICATION PERFORMED ON	APPROVAL	VERIFICATION RESULT	IS ERROR	IS WARNING	ADDRESS NAME	ADDRESS LINE	ADDRESS LINE 2	DISTRICT	CITY	REGION	POSTAL CODE	COUN
DCS-DCS-DCS-1	1	Melissa	10/5/2020 1:20:58 PM	10/28/2020 1:36:58 PM	<input type="checkbox"/>	AC03 AC16 AV24 GS05		Company ABC	18655 Woodberry Ct		Brookfield	WI	53045-4256	USA	
DCS-DCS-DCS-1	1	Overwrite	10/5/2020 1:20:58 PM		<input checked="" type="checkbox"/>			Company ABC	18655 Woodberry Ct		BRKF	WI	53045	US	

The Address Review screen allows a user to see what addresses were sent in for cleansing and review what was the returned from the address cleansing solution.

Actions Users can take on this page include the following

Approval – Users can use this checkbox to approve or unapprove an address which will determine if it is included in the output

Include In Next Verification – Users can use this flag to determine if the address will be sent for cleansing in the next process of Addresses. Usually this is only done on an initial run or if Source Data has been changed.

Overwrite Address – Users can choose to overwrite an address and change the address data directly within psaAddress. Recommendation is to change your legacy address data if possible.

Suggested Address

The Suggested Address page shows the user all of the data returned from the Address Cleansing solution for review. Users can review the Verification Results (Codes to determine what was changed, validated or contained an error). Also flags to see if the address record contained an Error or Warning.

psaAddress

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General Address Construct
Portal
Summary
Address Review
Suggested Address
Address Result Errors
Address Result Warning
Address Result Approve
Configuration
Result Code
Service Modules
Data
Reports
Admin

Suggested Address

Filter Applied: melissa

KEY	RESPONSE ID	VERIFICATION SERVICE	SOURCE DATA LAST CHANGED	VERIFICATION PERFORMED ON	VERIFICATION RESULT	IS ERROR	IS WARNING	ADDRESS NAME	ADDRESS LINE	ADDRESS LINE 2	DISTRICT	CITY
DCS-DCS-DCS-1	1	Melissa	10/5/2020 1:20:58 PM	10/28/2020 1:36:58 PM	AC03.AC16.AV24.GS05			Company ABC	18655 Woodberry Ct		Brookfield	
DCS-DCS-DCS-2	1	Melissa		10/28/2020 1:36:58 PM	AC02.AC03.AC10.AC16.AV24.GS06			B Ltd.	7050 Old Highway 70		Eagle River	
DCS-DCS-DCS-3	1	Melissa		10/28/2020 1:36:58 PM	AC02.AC16.AV25.GS05			C Enterprise	5750 Bou Ave Unit 1605		Rockville	
DCS-DCS-DCS-4	1	Melissa		10/28/2020 1:36:58 PM	AC02.AC16.AV24.GS05			Institution D	2815 Jeffries Ave		Los Angeles	

Address Result Errors

The Address Result Errors page shows only address records that returned with an error. These need to be reviewed by the business and corrected in order to get a correct result from the Address Cleansing solution.

psaAddress

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Address Result Warning
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Admin

Address Result Errors

147 rows

KEY	RESPONSE ID	VERIFICATION SERVICE	SOURCE DATA LAST CHANGED	VERIFICATION PERFORMED ON	VERIFICATION RESULT	IS ERROR	IS WARNING	ADDRESS NAME	ADDRESS LINE	ADDRESS LINE 2	DISTRICT	CITY	REGION	POSTAL CODE	COUNTRY
SAP_ECC_Cust-BusinessPartner-C0000000001	1	Melissa	11/9/2020 9:18:46 AM	10/28/2020 1:36:58 PM	AE01.GE02	✓		Test of Customer Create Customer Last Name	Calgary AB T2P 4H2		Calgary	AB	T2P 4H2	CAN	
SAP_ECC_Cust-BusinessPartner-C0000000002	1	Melissa		10/28/2020 1:36:58 PM	AE01.GE02	✓		F1 Customer F1 Customer Last Name	Calgary AB T2P 4H2		Calgary	AB	T2P 4H2	CAN	
SAP_ECC_Cust-BusinessPartner-C0000000003	1	Melissa		10/28/2020 1:36:58 PM	AE01.GE02	✓		Test2 of Customer Create Customer Last Name	Calgary AB T2P 4H2		Calgary	AB	T2P 4H2	CAN	

Address Result Warning

The Address Result Warning page shows only address records that returned with a warning. These need to be reviewed by the business and determine if a correction needs to be made or not.

psaAddress

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General Address Construct
Portal
Summary
Address Review
Suggested Address
Address Result Errors
Address Result Warning
Address Result Approve
Configuration
Result Code
Service Modules
Data
Reports
Admin

Address Result Warning

75 rows

KEY	RESPONSE ID	VERIFICATION SERVICE	SOURCE DATA LAST CHANGED	VERIFICATION PERFORMED ON	VERIFICATION RESULT	IS ERROR	IS WARNING	ADDRESS NAME	ADDRESS LINE	ADDRESS LINE 2	DISTRICT	CITY	REGION	POSTAL CODE	COUNTRY
SAP_ECC_Cust-BusinessPartner-C0000000001	1	Melissa	11/9/2020 9:18:46 AM	10/28/2020 1:36:58 PM	AE01.GE02	✓	✓	Test of Customer Create Customer Last Name	Calgary AB T2P 4H2		Calgary	AB	T2P 4H2	CAN	
SAP_ECC_Cust-BusinessPartner-C0000000002	1	Melissa		10/28/2020 1:36:58 PM	AE01.GE02	✓	✓	F1 Customer F1 Customer Last Name	Calgary AB T2P 4H2		Calgary	AB	T2P 4H2	CAN	
SAP_ECC_Cust-BusinessPartner-C0000000003	1	Melissa		10/28/2020 1:36:58 PM	AE01.GE02	✓	✓	Test2 of Customer Create Customer Last Name	Calgary AB T2P 4H2		Calgary	AB	T2P 4H2	CAN	
SAP_ECC_Cust-BusinessPartner-C0000000006	1	Melissa		10/28/2020 1:36:58 PM	AE01.GE02	✓	✓	Mark Test	Moncton NB E1C 7K4		Moncton	NB	E1C 7K4	CAN	

Address Result Approve

The Address Result Approve page shows only address records that returned without a Error or Warning flag. These records go into an approval state that is automatically set. These addresses should still be reviewed for accuracy.

KEY	RESPONSE ID	VERIFICATION SERVICE	SOURCE DATA LAST CHANGED	VERIFICATION PERFORMED ON	VERIFICATION RESULT	IS ERROR	IS WARNING	ADDRESS NAME	ADDRESS LINE	ADDRESS LINE 2	DISTRICT	CITY	REGION
DCS-DCS-DCS-1	1	Melissa	11/13/2020 9:31:44 AM	10/28/2020 1:36:58 PM	AC03 AC16 AI/24 GS05			Company ABC	18655 Woodberry Ct		BRKF	WI	
DCS-DCS-DCS-1	1	Overwrite	11/13/2020 9:31:44 AM					Company ABC	18655 Woodberry Ct		BRKF	WI	
DCS-DCS-DCS-2	1	Melissa	10/8/2020 10:18:44 AM	10/28/2020 1:36:58 PM	AC02 AC03 AC10 AC16 AI/24 GS06			B Ltd	7050 Old HighwayW 79y 70			Eagle RiverTOWHN GF-ST-GERMAIN	
DCS-DCS-DCS-2	1	Overwrite	10/8/2020 10:18:44 AM					Test123	7050 NewGLD HWY 70			TWN OF ST. GERMISGWN-GF ST-GERMAIN	

Configuration – Result Code

The Result Code page allows you to determine what code returned from the Address Cleansing solution makes a Address Record an Error or Warning by checking off the checkbox. This determines how the Address will be handled within psaAddress.

VERIFICATION SERVICE	RESULT CODES	
DataServices	251	
Melissa	45	

VERIFICATION SERVICE	CODE	SHORT DESCRIPTION	LONG DESCRIPTION	ERROR	IS WARNING
Melissa	AC18	PO Box Change	The PO Box was added or changed.	<input type="checkbox"/>	<input type="checkbox"/>
Melissa	AC19	Premise Type Change	The premise type was added or changed.	<input type="checkbox"/>	<input type="checkbox"/>
Melissa	AC20	House Number Change	The house number was changed.	<input type="checkbox"/>	<input type="checkbox"/>
Melissa	AC22	Organization Change	The organization was added or changed.	<input type="checkbox"/>	<input type="checkbox"/>
Melissa	AE01	Postal Code Error/General Error	The address could not be verified at least up to the postal code level.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Melissa	AE02	Unknown Street	Could not match the input street to a unique street name. Either no matches or too many matches found.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Melissa	AE03	Component Mismatch Error	The combination of directionals (N, E, SW, etc) and the suffix (AVE, ST, BLVD) is not correct and produced multiple possible matches.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Melissa	AE05	Multiple Match	The address was matched to multiple records. There is not enough information available in the address to break the tie between multiple records.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Melissa	AE08	Sub Premise Number Invalid	The thoroughfare (street address) was found but the sub premise (suite) was not valid.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Melissa	AE09	Sub Premise Number Missing	The thoroughfare (street address) was found but the sub premise (suite) was missing.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Melissa	AE10	Premise Number Invalid	The premise (house or building) number for the address is not valid.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Melissa	AE11	Premise Number Missing	The premise (house or building) number for the address is missing.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Melissa	AE12	Box Number Invalid	The PO (Post Office Box), RR (Rural Route), or HC (Highway Contract) Box number is invalid.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Melissa	AE13	Box Number Missing	The PO (Post Office Box), RR (Rural Route), or HC (Highway Contract) Box number is missing.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Melissa	AE14	PMB Number Missing	US Only. The address is a Commercial Mail Receiving Agency (CMRA) and the Private Mail Box (PMB or #) number is missing.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Melissa	AE17	Sub Premise Not Required (Deprecated - See AS23)	A sub premise (suite) number was entered but the address does not have secondaries. (Deprecated - See AS23)	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Service Modules – Melissa Data – Batch Summary

The Melissa Data Batch Summary page displays the records that you have sent to Melissa Data for Address cleansing. Batches are sent in 100 record batches. There is a Resend button available on this screen in case of a failure. This will re-send the addresses to Melissa Data for cleansing.

TRANSMISSION REFERENCE	BATCH CREATED	BATCH SENT	TOTAL RESULT RECORDS	RESEND	URL	CUSTOMER ID	OPTIONS	ADDRESS SOURCE
1	11/6/2020	11/6/2020	0	Resend	http://address.melissadata.net/v3/WEB/GlobalAddress/doGlobalAddress		LineSeparator: TAB	web\MelissaGlobalAddressBatch_Source
2	11/6/2020	11/6/2020	0	Resend	http://address.melissadata.net/v3/WEB/GlobalAddress/doGlobalAddress		LineSeparator: TAB	web\MelissaGlobalAddressBatch_Source
3	11/6/2020	11/6/2020	0	Resend	http://address.melissadata.net/v3/WEB/GlobalAddress/doGlobalAddress		LineSeparator: TAB	web\MelissaGlobalAddressBatch_Source
4	11/6/2020	11/6/2020	0	Resend	http://address.melissadata.net/v3/WEB/GlobalAddress/doGlobalAddress		LineSeparator: TAB	web\MelissaGlobalAddressBatch_Source
5	11/6/2020	11/6/2020	0	Resend	http://address.melissadata.net/v3/WEB/GlobalAddress/doGlobalAddress		LineSeparator: TAB	web\MelissaGlobalAddressBatch_Source
6	11/6/2020	11/6/2020	0	Resend	http://address.melissadata.net/v3/WEB/GlobalAddress/doGlobalAddress		LineSeparator: TAB	web\MelissaGlobalAddressBatch_Source

Service Modules – Melissa Data – Parameters

The Melissa Data Parameter page allows you to configure the Melissa Data plugin parameters.

URL – Specifies the URL that the plugin uses to call Melissa Data to fetch results

CustomerID – The Melissa Data License Key that needs to be provided with each call

Options – How you want the results returned (Defaulted to LineSeparator: TAB)

Address Source – The Source file from which the data will be sent to Melissa Data.

psaAddress | Melissa Address Parameter

URL CUSTOMER ID OPTIONS ADDRESS SOURCE

http://address.melissadata.net/v3/WEB/GlobalAddress/doGlobalAddress		LineSeparator.TAB	webMelissaGlobalAddressBatch_Source
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Service Modules – Melissa Data – Response Mapping

The Melissa Data Response Mapping page allows you to configure which fields the Responses are mapped to. Also allows for Manual SQL expressions to manipulate the data prior to mapping.

psaAddress | Melissa Address Response Mapping

GENERIC ADDRESS OUTPUT FIELD MELISSA ADDRESS RESPONSE FIELD MANUAL SQL EXPRESSION

GENERIC ADDRESS OUTPUT FIELD	MELISSA ADDRESS RESPONSE FIELD	MANUAL SQL EXPRESSION
Address_Line	AddressLine1	
AddressName	Organization	
City	Locality	
Country	CountryISO3166_1_Alpha3	
District	DependentLocality	
PostalCode	PostalCode	
Region	AdministrativeArea	

Troubleshooting

Troubleshooting Guide for troubleshooting the psaHarmonization webapp.

Site Menu missing psaAddress link

If you cannot see the psaAddress application in the site menu.

You must request access to the psaHarmonization webapp to be able to view the application.

Access can be granted at a user level, configurator or administration level.

License is expired

Open a ticket with BackOffice Associates to request a new license key. Once the new license key is applied the application will be available again.