

Syniti Solutions psaHarmonize

Installation, Configuration & User Guide

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Overview

psaHarmonize will harmonize any and all data into logical groupings that business users can confirm and use to load downstream objects. psaHarmonize makes setup and the user experience straightforward and simple. There are switchboards that contain metrics at a glance, and dashboarding to visually represent progress and potential issues.

Key Features:

- Relevancy and Address Cleansing solutions included
- Grouping Algorithm included
- Integration with Data Services Address Cleansing and Harmonization solutions
- Application comes pre configured with common harmonization values
- All Waves and Objects included
- User Interface to allow business users to determine golden records from groupings
- Reports to show statistics
- User Enrichment of records
- Application is designed to be customized to client request using configuration pages.

Install psaHarmonize

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

Prerequisites

psaPerformanceBench needs to be installed prior to installing psaHarmonize. Refer to the psaPerformanceBench Application Guide for install details.

Download the Application & License

The psaHarmonize 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 **psaHarmonizes.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 **psaHarmonize_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.

Post Install Steps

If desired and approved at your client site you can choose to use a CLR (Common Language Runtime) version of the levenshtein algorithm. The benefits to using a CLR is improved performance over a normal SQL function. These steps are options and require administrative rights on the SQL server potentially requiring a SQL DBA to execute.

1. Navigate to the DSP Install\Web\User Area folder.
2. Open the folder named D29C8C60-12B8-4200-B09D-0AACC80EF33A
3. Locate the SQL Script named CLR_Enable.sql
4. Ensure you have administrative privileges on the SQL Server (If not a DBA will be required to execute the script). Also verify that the client site approves safe CLR's to be used.
5. Open a new query window in SQL Server.
6. Copy the contents of CLR_Enable.sql into the query window and execute.
7. Now the CLR version of the levenshtein algorithm will be used when harmonize processing occurs.

Note: A backup of the original function has been saved as `boaLevenshteinScore_Bak`. If at any time you need to revert you can run the script `CLR_Disable.sql` to switch back to the function and disable CLR functionality on the database.

Configure psaHarmonize

psaHarmonize 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 psaHarmonize, 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 psaHarmonize appears here.
 3. Select **Admin > Configuration > Site Menu** in the Navigation pane.
 - a. Ensure that psaHarmonize appears here. If not, then:
 - i. Click **Add**.
 - ii. Enter a priority in the **PRIORITY** field.
 - iii. Enter **psaHarmonize** as the label for the site menu option in the **LABEL** field.
 - iv. Select the **psaHarmonize : psaHarmonize** 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 psaHarmonize application, then review the "Define Security Roles" article in the DSP Online Help to ensure that your DSP user has access to psaHarmonize. 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 psaHarmonize, security must be configured. psaHarmonize 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 'psaHarmonize Object Roles' security definition
6. Add the Objects relevant for that groupign (Eg Customer/Vendor/Business Partner)

Grouping Configuration.

Grouping Configuration controls all aspects a group of data such as Customer, Vendor, Business Partner is processed.



OBJECT ID	DESCRIPTION	STEADY STATE	STEADY STATE OBJECT ID	MATCH THRESHOLD	AUTO APPROVAL THRESHOLD
BusinessPartner	Business Partner	<input type="checkbox"/>	BP_GR	70.00 %	95.00 %

Navigate to psaHarmonize -> Config -> Grouping

Validate the ObjectID exists that will need harmonization (Eg 'BusinessPartner')

1. ObjectID – The name of the object that you will be harmonized (Customer/Vendor/BusinessPartner)
2. SteadyState – Will this object be used after go-live as a ongoing process (normally unchecked)
3. SteadyStateObjectID – The ObjectID to be used after go live as the steady state ongoing process (Only populated if above is checked)
4. Match Threshold – The minimum confidence score a record can have in common with another and become a grouping.

5. Auto Approval Threshold – The lowest confidence score a grouping can have and become auto approved.
6. Name – The SQL field values that will be used to generate the names for groupings.
7. Status – Contains all of the grouping status's and if they indicate if the grouping is complete or not
8. Algorithm – Contains the keys that will be used by the algorithm to perform matches
 - a. Overall Weight – The overall weight that the algorithm will have (only valid when more than 1 algorithm is active)
 - b. Levenshtein Max (The maximum number of differences in a string that can be different before the algorithm stops and doesn't score the comparison. For performance 10 should be the max)
 - c. Candidate Threshold – The score that the grouping must be equal to or greater than to become a match
 - d. Active – If the algorithm is active or not
 - e. Field Config – The fields and SQL rules to create the key for grouping
 - i. Dimension Field – The name of the key to hold data (must exist in ttBusinessPartner or ttMaterial)
 - ii. Dimension Field SQL – The SQL required to generate the key
 - f. Dimension SQL – The SQL that is used to update the Dimension Key field.
9. Segment – If the records in the grouping are sufficiently large (Generally over 10k) segmentation is suggested. This is achieved by entering a value in the max segment field. The page will then automatically split your grouping into multiple segments for processing.
10. Sources – This should contain all zSource values for the Object
 - a. Golden Record – Can this source be used to create a golden record
 - b. Auto Approval – Can this source be used to auto approve records
 - c. Allow Enrichment – Can this source be enriched (values updated through psaHarmonize and not the source)
11. Processing – This page contains all the operations required from start to finish to harmonize the selected object. Processing is done from this page. The user is encouraged to customize this page to fit their individual processing strategy for harmonization.

Grouping Status Config (Vertical View)

✕ Grouping Config
Edit
Delete
📄

Object ID	BusinessPartner
Description	Business Partner
Steady State	<input type="checkbox"/>
Steady State Object ID	BP_GR
Match Threshold	70.00 %
Auto Approval Threshold	95.00 %
Status	<div style="text-align: center;"> 5 </div>
Algorithm	<div style="text-align: center;"> 2 </div>
Segment	<div style="text-align: center;"> 1 </div>
Sources	<div style="text-align: center;"> 7 </div>
Processing	<div style="text-align: center;"> 13 </div>
Multiple Master	<input checked="" type="checkbox"/>
Subordinate	<input checked="" type="checkbox"/>
Duplicate	<input checked="" type="checkbox"/>

Additional functionality on the vertical view.

1. Multiple Master – Toggles on/off functionality if Multiple Masters need to be selected within a single grouping.
2. Subordinate – Toggles on/off functionality if records within a grouping need to be identified as Subordinates to a master record.

- Duplicate – Toggles on/off functionality if records within a grouping need to be identified as Duplicates to a master record.

Grouping Name Config

Grouping Name Config Object ID BusinessPartner

S OBJECT ID ▾ GROUPING NAME SQL

BusinessPartner left(Name1 + Name2,35)

Specify the Grouping Name SQL that will be used to generate names for the groupings.

Grouping Status Config

Grouping Status Config Object ID BusinessPartner 5 rows

	PRIORITY ▾ ²	GROUPING STATUS	DESCRIPTION	IMAGE ID	IMAGE	ACTIVE	COMPLETE	
	1	INPROGRESS	In Progress	CranSoft.Object.BackgroundEvents		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	2	NOTSTARTED	Not Started	CranSoft.Action.Help		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	3	COMPLETE	Complete	CranSoft.Object.LightGreen		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	6	REJECTED	Rejected	CranSoft.Action.Cancel		<input type="checkbox"/>	<input type="checkbox"/>	
	7	AUTOAPPROVE	Auto Approved	Legacy.Object.PlusGreen		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Create or modify Grouping Status for each ObjectID.

- Grouping Status – The short name used by the system to indicate what the status represents
- Description – A full description of the status for users to see.
- ImageID – The DSP Image ID that will display as an icon for the image.
- Image – The icon users will see (based on the ImageID value)
- Active – Determines if the Status is active
- Complete – Does the status mean that the grouping is completed

Dimension Field Config

Dimension Field Config Object ID BusinessPartner 2 rows

Add Edit

DIMENSION	OVERALL WEIGHT	LEVENSHTEIN MAX	CANDIDATE THRESHOLD	ACTIVE	FIELD CONFIG	DIMENSION SQL
AddressKey	60.00 %	10	70.00 %	<input checked="" type="checkbox"/>	6	CountryKey + RegionKey + PostalKey + CityKey + StreetKey
NameKey	40.00 %	10	70.00 %	<input checked="" type="checkbox"/>	2	NameFieldKey

Setup the Keys that will be used to generate groupings.

1. Dimension – The name of the key that will hold the values (must exist in ttBusinessPartner/ttMaterial table)
2. OverallWeight – The weight that the individual key will be given. If you are using just 1 key make this 100%. If using multiple keys make sure the total between all equals 100%. (Example NameKey 40%, AddressKey 60%, 40+60 = 100%)
3. LevenshteinMax – The maximum number of characters that do no match before the algorithm stops attempting to generate a score (Default is 10)
4. CandidateThreshold – The loweset percentage score that will be considered for generating a grouping with another record.
5. Active – If the Key is active or not
6. Field Config – Configuration for each SubKey to generate the Dimension
7. DimensionSQL – If using multiple subkeys this controls the order of the FieldConfig (SubKeys) should be concatenated together.

Segment Config

Segment Object ID BusinessPartner 1 rows

Edit

OBJECT ID	MAX SEGMENT	ROW COUNT	SEGMENT COUNT	PROCESS SEGMENT	DURATION
BusinessPartner	500	19594	40	41	Duration

Segmentation is required for large data sets (>10,000 records) that need to be harmonized. Segmentation allows smaller chunks of records to process and prevents timeouts.

1. Max Segment – The number of records desired for each segment (Default 2,000)
2. Row Count – Automatically generated from looking at the source data counts
3. Segment Count – Automtically genrated based on dividing the MaxSegment by RowCount
4. Process Segment – Controls which segment is being processed (Set to 1 when processing, the system will increment it until finished).

Source Config

Primary Source Config Object ID
BusinessPartner

7 rows

Add Edit

	S	Z SOURCE	MASTER RECORD	AUTO APPROVAL	ALLOW ENRICHMENT	
	<input checked="" type="checkbox"/>	dgSAP.KNA1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	dgSAP.LFA1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	Northwind	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	Northwind_Copy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input type="checkbox"/>	SAP_ECC	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input type="checkbox"/>	SAP_ECC_Cust	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	sdbCustomerDedupe	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Setup Source information and control how it is handled.

1. zSource – The name of the Source System
2. Master Record – Will this source be the master record when it is contained in a grouping with other sources. Only 1 source can be selected. (Example SAP_ECC could be the Master Record when grouped with other sources)
3. Auto Approval – Will this source be Auto Approved when there is just 1 source record in a grouping. (Can only be selected if Master Record is checked)
4. Allow Enrichment – Allows source data be modified within psaHarmonize by users.

Processing Config

Processing Object ID
BusinessPartner

10 rows

Edit

	S	OBJECT ID	ACTIVE	PRIORITY	DESCRIPTION	EVENT TYPE	LINK TO PAGE	JOB STATUS	JOB START TIME	DURATION(MM:SS)	
	<input type="checkbox"/>	BusinessPartner	<input type="checkbox"/>	30	Refresh from Source (Collect)	Collect.RefreshTarget	Transform - Objects				
	<input checked="" type="checkbox"/>	BusinessPartner	<input checked="" type="checkbox"/>	40	Central Relevancy - Transform - Apply Relevancy	Transform.Object	Transform - Objects	Completed	2/13/2020 11:00:34 AM	0:23	
	<input checked="" type="checkbox"/>	BusinessPartner	<input checked="" type="checkbox"/>	50	Address Cleanse	Transform.Object	Transform - Objects				
	<input type="checkbox"/>	BusinessPartner	<input type="checkbox"/>	55	psaAddress Cleanse App	Enrichment	psaHarmonize - Address Cleanse Portal				
	<input checked="" type="checkbox"/>	BusinessPartner	<input checked="" type="checkbox"/>	60	Central Relevancy - Transform - Pull Relevancy for Harmonization	Transform.Object	Transform - Objects	Completed	2/13/2020 11:01:04 AM	0:03	
	<input type="checkbox"/>	BusinessPartner	<input type="checkbox"/>	190	Harmonize Solution - Transform - Harmonization Process	Transform.Object	Transform - Objects	Completed	2/13/2020 11:01:24 AM	1:58	
	<input checked="" type="checkbox"/>	BusinessPartner	<input checked="" type="checkbox"/>	200	Harmonize Solution - Automate - Process All Segments	Automate.Interface		Ready			
	<input type="checkbox"/>	BusinessPartner	<input type="checkbox"/>	210	App - psaHarmonize - Harmonize Business Partners, Customers, Vendors and Materials	Enrichment	psaHarmonize - Candidate Switchboard				
	<input type="checkbox"/>	BusinessPartner	<input type="checkbox"/>	230	Address Cleanse - Enriched Records	Transform.Object	Transform - Objects				
	<input checked="" type="checkbox"/>	BusinessPartner	<input checked="" type="checkbox"/>	250	Central Relevancy - Transform - Export Cross Reference and tBusinessPartner_Export	Transform.Target	Transform - Targets	Failed	1/4/2021 9:17:19 AM	0:03	

Allows the end to end Harmonization process to exist on one page for easy understanding of all the different pieces that are required. All Events can be processed from this page.

1. Active – Determines if the Event is active or not
2. Priority – Priority of the Event
3. Description – Description of the Event
4. EventType – Determines what type of Event will be processed
5. {} – Parameters for the Event
6. LinkToPage – Provides a link to the page when applicable
7. JobStatus – Status of the job
8. Job Start Time – Time the job was started
9. Duration – Duration the Job took to execute

Region Config

Cross reference from country code to country description.

Security Config

Setup field level access based on the psaHarmonize Role

Workflow Config

Setup the look and feel of the workflows that will be distributed. Also choose if the workflow is active and what users are signed up to receive workflow.

Implementation Config

- 1) Message Type Config – Controls available Notes that can be created and if HasResponse is checked the note will send workflow
- 2) Event Type Config – Configure additional Event Types for processing
- 3) Event Type Param Config – Configure additional parameters for processing
- 4) Logical Synonyms Config – Choose what words are replaced to improve matching (ex West to W)

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 Harmonize Wave validate ttBusinessPartner, ttCandidates and ttCandidatesGroup are populated. **NOTE: It is highly recommended on the initial run to use a subset of data (500 records or less to test the process).**

Automate

Automate comes pre loaded with interfaces to support initial batch load with segmenting.

- 1) psaHarm_Initial. This interface processes the Harmonize Busienss Partner – Ddup targets per segment. Note - Ensure the table psaHarmonization.dbo.ztSegmentProcess is set to 1 for the ObjectID you are processing. **Note: Run this through the psaHarmonize -> Config -> Grouping Config -> Processing -> psaHarmonize Initial Load by Segments process and ztSegmentProcess will automatically be reset for you.**
- 2) psaHarm_Steady. This interface processes the Steady State objects under Business Partner DDup to support ongoing harmonization support. This can be scheduled to run every minute/hour/day to support client needs. Note – Cutover target must be run prior to using Steady State

User Guide

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

Getting Started

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

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

Harmonize Switchboard

Candidate Switchboard - Group 🔍 ⚙️ 1 rows

OBJECT ID ▾	TOTAL RECORDS	UNIQUE RECORDS	GROUPED RECORDS	TOTAL	NOT STARTED	REJECTED	IN PROGRESS	COMPLETE	AUTO APPROVE	MASTER RECORDS	UN GROUPED	RECENT SOURCE CHANGE [⌂]
Business Partner	19594	7994	11600	2803	876	0	0	0	1927	1927	0	0 [⌂]
				2803	876	0	0	0	1927		0	0

The Harmonize Switchboard contains all Objects that are being harmonized on one page for easy access. This page provides an overview of the harmonization statistics and progress. Clicking the hyperlink on each column shows you the records that make up the count.

Field	Description of the field
ObjectID	The ObjectID that has been harmonized (eg BusinessPartner)
Total Records	The total number of records considered for harmonization
Unique Records	Records that did not find a similar record and therefore could not form a grouping
Grouped Records	Records that found 1 or more records in common and became a grouping
Total	Total number of groupings created
Not Started	Groupings that have not been touched by a business user
In Progress	Groupings that have been touched by a business user but have not been completed
Complete	Groupings that have been completed by a business user
Auto Approve	Groupings that have been auto approved by a transform rule
Master Records	The number of records that will be loaded into the Target system
Ungrouped	Records that were in a grouping but were broken out by a business users
Recent Source Change	Records in a grouping that were impacted by a source record change or creation.
Xref	View the cross reference data that will be used by downstream waves based of the harmonization effort.

Candidate Groups

The Candidate Group page shows the high level groups the candidates have been stored under. These Groups have a grouping status that can have a status of NotStarted, InProgress or Complete. This page has the ability to merge 2 groups together if they are found to be similar. You can also add another record to the grouping. Finally you can add notes which can be used to contact a

manager with questions or to keep track of work and changes. Clicking the count under the Candidates column will drill you down to the Candidates Detail page.

Candidate Group Object ID BusinessPartner Grouping Status NOTSTARTED 173 rows

OBJECT ID	GROUPING ID	ACCOUNT GROUP	CONFIDENCE	GROUPING STAT	OWNER	NEWEST BUSINESS PARTNER ON	ADDED ON	MERGE GROUP	CANDIDATES
BusinessPartner	19TH HOLE C O HSV P.O.A			?			12/17/2018		1
BusinessPartner	ARK LAW ENFORCEMENT	Z001	70 %	?			12/17/2018		1
BusinessPartner	ARK LAW ENFORCEMENT -EMPLOY			?			12/17/2018		1
BusinessPartner	ARKANSAS HEALTH CENTER	Z001	70 %	?			12/17/2018		2

Candidate Details

Candidate Details Object ID BusinessPartner 2 rows

OBJECT KEY	OBJECT DATA	ACCOUNT GROUP	Z SOURCE	CONFIDENCE	NAME 1 / NAME 2	SEARCH TERM	STREET ADDRESS	TAX NUMBER1	COUNTRY	PO INVOICE LAST DATE	ANNUAL SALES	SOURCE CHANGED	MASTER RECORD	SUBORDINATE	SUBORDINATE TO	DUPLICATE	DUPLICATE TO	ENRICHED
C-0000401965	Customer	0170	SAP_ECC	91	Jenna Trully		PO BOX 1030 ILLINOIS CITY,IL 61259 US		US				<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C-0000402068	Customer	0170	SAP_ECC	91	Kenny A Trully		PO BOX 1030 ILLINOIS CITY,IL 61259 US		US				<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Candidate Details Page shows the individual Candidates under the selected grouping. This page has the following actions.

Field	Description of the field
	Mark All Master – Marks all records in the grouping as master records. This is desired when all records within the grouping are unique
	Move To Grouping – Removes the selected candidate from the grouping and assign to another grouping.
	Add To Grouping – Find another record from another grouping and remove it from that grouping and add to the current grouping.
	Ungroup – Removes the record from the group and puts it in a new group by itself. This record will show up as Ungrouped on the Candidate Switchboard.
	Enrich – Allows users to enrich fields on records marked as Primary BP, Primary Cust or Primary Vend different values that are more complete (Example Name1 – Corp, Name2 – Corporation).

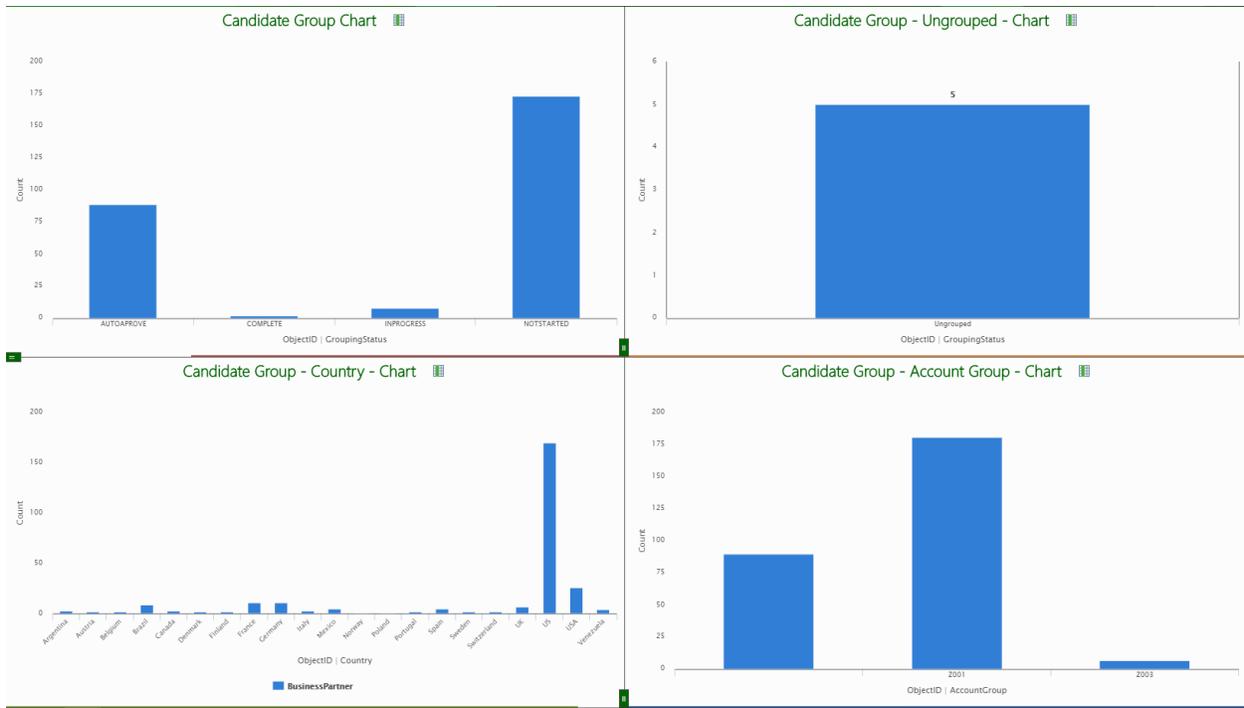
	Reset Grouping – Resets the entire Grouping by unchecking Primary BP, Primary Cust and Primary Vend records as well as updating the Group Status to NotStarted.
	Mark Complete – Marks the record with a Grouping Status of Complete. (Must have selected a Primary BP and Primary Cust/Primary Vend)
	Audit Log – Page displays all changes made to the selected candidate.
	Additional Details – Shows all the fields for the selected Candidate record. Can be used to determine which record to choose for a Primary BP, Primary Cust or Primary Vend. (Note – clicking this same icon on the toolbar shows data for all candidates in the grouping)
	Bank Details – Shows bank details for the selected candidate. Can be used to determine a primary record. (Note – clicking this same icon on the toolbar shows data for all candidates in the grouping)
	Company Code – Shows company code details for the selected candidate. (Note – clicking this same icon on the toolbar shows data for all candidates in the grouping)
	Sales Org – Shows sales org details for the selected candidate. (Note – clicking this same icon on the toolbar shows data for all candidates in the grouping)
	Purchasing – Shows purchasing details for the selected candidate. (Note – clicking this same icon on the toolbar shows data for all candidates in the grouping)
	Partner Functions – Shows partner function details for the selected candidate. (Note – clicking this same icon on the toolbar shows data for all candidates in the grouping)
Master Record	Marks the record as the master record for the grouping. Multiple masters can be selected based on your configuration in the Config -> Grouping -> Vertical view page
Subordinate	Marks the record as a subordinate.
SubordinateTo	Enter the master record that the record is a subordinate of. Only required if Multiple Masters are chosen in the grouping.

Duplicate	Marks the record as a duplicate
DuplicateTo	Enter the master record that the record is a duplicate of. Only required if Multiple Masters are chosen in the grouping.
	Notes – Allows users to keep notes on the candidate or to raise a question to management.

Dashboards

The Dashboard page shows graphs for candidate groups with different groupings applied.

Candidate Group Chart	The first and most important chart shows the number of candidates in different Grouping Statuses. This can be used to monitor progress to determine how many records are left to be completed.
Candidate Group – Ungrouped – Chart	This chart shows groupings that only have 1 record assigned meaning there are no other records similar. These groupings should be manually inspected to insure there are no other records similar.
Candidate Group – Country – Chart	This chart shows candidates by country with their corresponding status. This allows users to work with the candidates by country.
Candidate Group – Account Group – Chart	This chart shows the Group Status by Account Group allowing users to work the candidates by account group.



Troubleshooting

Troubleshooting Guide for troubleshooting the psaHarmonization webapp.

Site Menu missing psaHarmonize link

If you cannot see the psaHarmonization 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.

No Data on the Candidate Switchboard.

The Candidate Switchboard page shows the grouping status of the candidate groups for each ObjectID. The data becomes populated by adding a source table under the ttBusinessPartner object in the Central Wave in Transform. Verify you have a source with data under the ttBusinessPartner object in the central wave. Also verify you are populating the Name and Address fields along with ObjectID, ObjectDataType, BusinessPartnerKey, zSource, zLegacyBusinessPartnerNumber and zLegacyBusinessPartnerSource fields. Once complete you must navigate to the Processing page in the psaHarmonization application and click the Process All button to refresh the data.

Candidate Switchboard - Group

1 rows

OBJECT ID ▼	NOT STARTED	IN PROGRESS	AUTO APPROVE	COMPLETE	TOTAL	UN GROUPED
BusinessPartner	173	7	89	3	272	5
			89	3	272	

Cannot enrich candidates

Pencil Toolbar button is dithered on Candidate Details screen. The configuration table **Config -> Grouping Config -> Source Config** must be populated with the Source System value in zSource and have the Allow Enrich checkbox checked off.

Primary Source Config

Object ID: BusinessPartner

7 rows

Add Edit

	S	Z SOURCE ▼	MASTER RECORD	AUTO APPROVAL	ALLOW ENRICHMENT	
	<input checked="" type="checkbox"/>	dgSAP.KNA1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	dgSAP.LFA1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input checked="" type="checkbox"/>	Northwind	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

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.