

Syniti Solutions psaCentralWave

Installation, Configuration & User Guide

Document History

Version	Comments	Date
1.5	Initial release	August 14, 2020
2.0	Enhancements around full usage of MAP and automate, expanded Relevancy criteria, inclusion of psaPerformanceBench for improved performance on transaction tables, separation of objects for easily PII security capability	Jan 5, 2021

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Overview

The PSA Relevancy is a tool built on the BackOffice™ Data Stewardship Platform®. It has been designed to support the identification of relevant MASTER Records (Customer, Vendor and Material) in preparation for further processing.

The tool uses a combination of DSP delivered applications and custom configuration that controls either by

- # of days or fixed date
- In and out of scope Company, Sales Organization, Purchasing Organization, Plants, Customer Account Group, Material Type
- Relevant client by zSource.
- Specific inclusion or exclusion by object key

Any remaining transactions after the filters are applied are considered relevant therefore causing an associated master record to be relevant.

The DSP applications in use are:

Application Name	Application Database	Working Database	Usage
Collect	DataGarage	sdbSAP_ECC	Schedules and executes data extraction from SAP
Assemble	CranPort		Data import and export
Automate	InterfaceServer		
Transform	DSW	dswCentral dswCentral_Cache	Processes logic to determine relevant records
System Administration	CranSoft	CranSoft	User access management
psaPerformanceBench	psaPerformanceBench	dswCentral	Performance enhancement
psaCentralWave	psaCentralWave	dswCentral dswCentral_Cache	Stores the Relevancy parameters

Install psaCentralWave

The application can be installed on Syniti Solutions DSP versions 7.4.1 and above. It has not been thoroughly tested on lower versions.

Prerequisites

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

Download the Application & License

The psaCentralWave 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 **psaCentralWave.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 **psaCentralWave_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 psaCentralWave

psaCentralWave 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 psaCentralWave, 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 psaCentralWave appears here.
 - 3. Select **Admin > Configuration > Site Menu** in the Navigation pane.
 - a. Ensure that psaCentralWave appears here. If not, then:
 - i. Click **Add**.
 - ii. Enter a priority in the **PRIORITY** field.
 - iii. Enter **psaCentralWave** as the label for the site menu option in the **LABEL** field.

iv. Select the **psaCentralWave : psaCentralWave** page from the **LINK TO PAGE ID** list box.

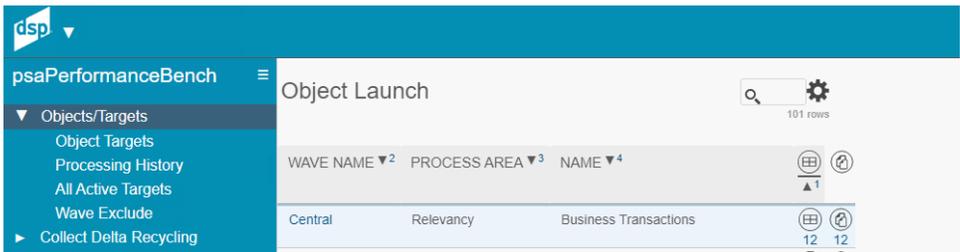
4. Select **Admin > Configuration > Parameters** in the Navigation pane.
 - a. Click **Clear Cache**.
 - b. Reload the browser tab.

If you still can't reach the psaCentralWave application, then review the "Define Security Roles" article in the DSP Online Help to ensure that your DSP user has access to psaCentralWave. 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. PsaPerformanceBench Configuration

In order for the ADM rules to run properly psaPerformanceBench must be configured for the Targets registered under the Object 'Business Transactions'. These include the following

- ttAPHistory
- ttApOpen
- ttARHistory
- ttAROpen
- ttMaterialMovement
- ttPayments
- ttProductionOrder
- ttPurchLine
- ttSalesHeader
- ttSalesLine
- ttSalesPartners

For each of the above Target Tables navigate to psaPerformanceBench on the left menu pane.



Click on Objects/Targets and select the WaveName/ProcessArea/Name -



Central/Relevancy/BusinessTransactions line. Click the Targets Icon

WAVE	PROCESS AREA	OBJECT	TARGET	ACTIVE	RULE BUILD	RULE BUILD ON	RULE BUILD BY	BULK RULED PROCESS ON	DSP DATA BLOCK MAX
1	Central-Relevancy-Business Transactions	ISalesHeader	ISalesHeader	✓	✓	11/19/2020 2:41:00 PM	MPetry	12/14/2020 1:38:00 PM	1
2	Central-Relevancy-Business Transactions	ISalesLine	ISalesLine	✓	✓	12/10/2020 4:51:00 PM	MPetry	12/14/2020 1:38:00 PM	162
2	Central-Relevancy-Business Transactions	ISalesPartners	ISalesPartners	✓	✓	11/19/2020 2:42:00 PM	MPetry	12/14/2020 1:38:00 PM	183
1	Central-Relevancy-Business Transactions	ISAPHistory	ISAPHistory						150
2	Central-Relevancy-Business Transactions	ISAPOpen	ISAPOpen						180

The pane below will display all the Targets listed above. For each Target click the activate button



Click on the Sources Icon for each of the activated Target Tables



Activate the Source Table on this line. This will activate bulk processing for this source table.

If any mapping changes were done, refresh the mapping



Make sure that the zActive = 1 is in the filtering if you have any rules that adjust zActive flag

Build the rules



Once all Target and Source tables have been activated navigate to Transform -> Business Transactions and process each target listed above to verify it is error free. You will see that the “normal” rules have been de-activated and new rules added

Initial Configuration

Add users to supplied SAP_ECC zSource if appropriate

1. Select **Advanced Data Migration > Construct > ZSource** in the Navigation pane.

Add users to the developer under design to see and utilize automate

1. Select **Advanced Data Migration > Design > Targets** in the Navigation pane.
2. Add users to the developer icon

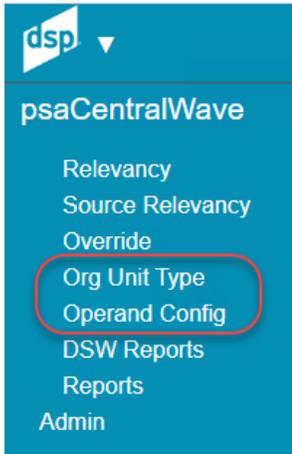
Review Utility Fields Append configuration

1. Select **Advanced Data Migration > Design > Append Utility Columns** in the Navigation pane.
2. Review Utility fields and determine visibility. This controls whether a utility field will show up in MAP and whether at the Source or Target level. zActive is used within the application and is generally expected to be visibility of NONE. Please see ADM_DM Config Inventory for further information

There are several tables that need to be reviewed before the initial run of Relevancy.

In psaCentralWave, there are 2 initial configuration areas that must be confirmed prior to the Source relevancy criteria definition

- Org Unit Type
- Operand Config



Org Unit Type:

The following Org Units are provided out of the box, but you can add custom Org Units to fit the business requirements. Org units defined here can be used to enter specific **exclude** criteria at the Source Relevancy level.

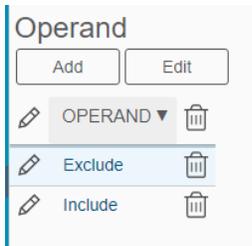
The screenshot shows the 'Org Unit Type' configuration interface. It includes 'Add' and 'Edit' buttons at the top. Below is a table with columns for 'ORG UNIT TYPE' and 'DESCRIPTION'. Each row has an edit icon to the left of the type name.

ORG UNIT TYPE	DESCRIPTION
AcctGrpCust	Customer Account Group
AcctGrpVend	Vendor Account Group
CompCode	Company Code
MatType	Material Type
Plant	Plant
PurchOrg	Purchasing Organization
SalesOrg	Sales Organization

The Org units can be found in the table: **ztOrgUnit** – Contains the check table for various Organizational Units that will be used in relevancy determination. Multiple Types are provided out of the box. All associated rules are also provided in transform. If new Org Unit Types are added, additional custom rules will need to be developed.

Operand Config

“Exclude” and “Include” are provided as out of the box operands. You can add additional operands as needed to meet the business needs. These Operands will be used in defining the specific Source Relevancy.



Operands can be found in table ztOperand.

Source Specific Configuration

After the Org Units and Operands have been identified, the relevancy criteria can be captured specific to each source.



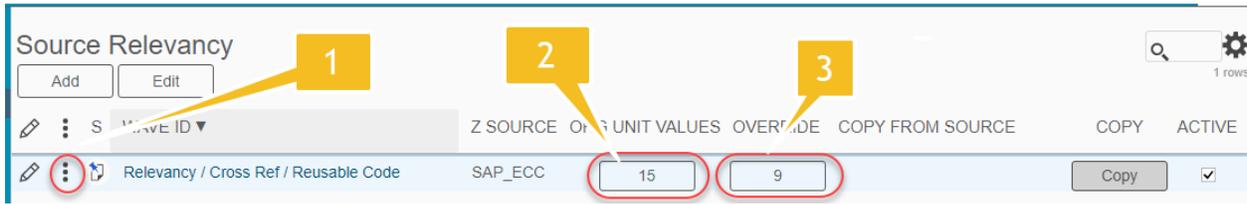
Source Relevancy:

Source Relevancy is where you will specify the criteria needed to support relevant record selection at the source level. The parameters defined in Source Relevancy can be found in the table ztSourceRelevancy. This table contains the parameters that control transactional relevancy determination.

zSources can be marked as Active or not to facilitate processing against specific zSources. All source zsources associated to the Central Wave processing area will be affected.

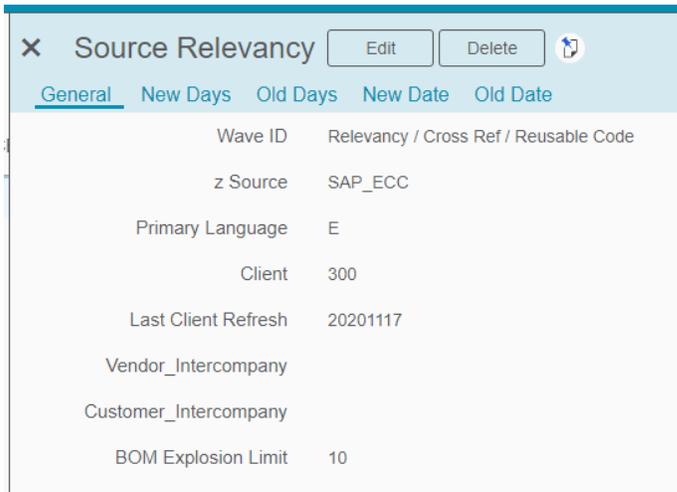
Note that either the xxxDays_xxxxxxx OR xxxDate_xxxxxxx need to be populated, NOT both. Typically, in the beginning of projects Days are used and as the GoLive date gets closer, you might define a specific cut-off date.

There are three areas within Source Relevancy that require configuration:



1. Vertical View for the zSource:

This is where you will specify most of the details that define relevancy for that specific zSource. There are many parameters to define here, note the multiple tabs:



In the “General” tab, you will find the following parameters:

- **zSource** – The zSource that the relevancy pertains to
- **PrimaryLanguage** – Primary language that is being used (used in Material description and Address selection)
- **Client** – the client number that the relevancy pertains to and is used as the first rule to set the relevant flag
- **LastClientRefresh** – Used in the calculation of days ie. (dbo.ztSourceRelevancy.LastClientRefresh AS smalldatetime) - dbo.ztSourceRelevancy.OldDays_APPayment > dbo.ttPayments.PrintDate. This date is critical for all relevancy criteria based on Days.
- **Vendor_InterCompany** – which Account group is recognized as Vendor Intercompany account and should always be deemed relevant from a general view
- **Customer_InterCompany** – which Account group is recognized as Customer Intercompany and should always be deemed relevant from a general view
- **BOMExplosionLimit** – number of recursive calls to be made to gather all subsequent component materials

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 Days OR New Date, you can not use both.

General	<u>New Days</u>	Old Days	New Date	Old Date
	New Days_Customer	720		
	New Days_Vendor	720		
	New Days_Material	720		
	New Days_PO Contract	720		
	New Days_SO Contract	720		

Note the following fields:

- **NewDays_Customer** – number of days (considering refresh date) after entry date that a customer is still considered a new customer and subsequent transactional relevant requirements do not apply
- **NewDays_Vendor** – number of days (considering refresh date) after entry date that a vendor is still considered a new vendor and subsequent transactional relevant requirements do not apply
- **NewDays_Material** – number of days (considering refresh date) after entry date that a material is still considered a new material and subsequent transactional relevant requirements do not apply
- **NewDays_POContract** – number of days (considering refresh date) after entry date that a Purchasing contract is still considered a new customer and subsequent transactional relevant requirements do not apply
- **NewDays_SOContract** – number of days (considering refresh date) after entry date that a Sales Order contract is still considered a new customer and subsequent transactional relevant requirements do not apply

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 that you can only define Old Days OR Old Date, you cannot use both.

Source	Value
Old Days_PO Contract	7300
Old Days_PO	7300
Old Days_AP Payment	7300
Old Days_SO Contract	7300
Old Days_SO	7300
Old Days_AR Payment	7300
Old Days_Mat Movement	7300
Old Days_Production Ord	7300
Old Days P2P	7300
Old Days SD	7300
Old Days MM	7300

Note the following fields on this tab:

- **Vendors:**

- **OldDays_Contract** – the number of days (considering refresh date) after DocCreate for ttPurchHeader where PurchCat = K/L that the record is considered part of the relevant determination of Vendor

Note: please review that the indicated PurchCat(s) are appropriate to the client environment

- **OldDays_PO** – the number of days (considering refresh date) after DocCreate for ttPurchHeader where PurchCat = F/A that the record is considered part of the relevant determination of Vendor

Note: please review that the indicated PurchCat(s) are appropriate to the client environment

- **OldDays_APPayment** – the number of days (considering refresh date) after ClearingDate for ttAPHistory or PrintDate for ttPayments that the record is considered part of the relevant determination of Vendor

- **Customers:**

- **OldDays_SOContract** - the number of days (considering refresh date) after DocCreate for ttSalesHeader where the OrdCat = B/C that the record is considered part of the relevant determination of Customer

Note: please review that the indicated OrdCat(s) are appropriate to the client environment

- **OldDays_SO** - the number of days (considering refresh date) after DocCreate for ttSalesHeader where the OrdCat <> B/C that the record is considered part of the relevant determination of Customer

Note: please review that the indicated OrdCat(s) are appropriate to the client environment

- **OldDays_ARPayment** - the number of days (considering refresh date) after ClearingDate for ttARHistory or PrintDate for ttPayments that the record is considered part of the relevant determination of Customer
- **Materials:**
 - **OldDays_MatMovement**
 - **OldDays_ProductionOrder:**
 - **OldDaysMM** - The number of days (considering refresh date) after ItemFinishDate or ActualFinishDate or SchedRelDate if any are > 0 for ttMaterialMovement that the record is considered part of the relevant determination of Material
- **No longer used:**
 - **OldDaysP2P** – not currently used and can be utilized for customization purposes
 - **OldDaysSD** – not currently used and can be utilized for customization purposes

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. Note that you can only define New Days OR New Date, you cannot use both. The fields are similar as used to define “NewDays” above:

- **NewDate_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
- **NewDate_Vendor** – The date less than or equal to the entry date when a vendor is still considered a new customer and subsequent transactional relevant requirements do not apply
- **NewDate_Material** – The date less than or equal to the entry date when a material is still considered a new customer and subsequent transactional relevant requirements do not apply
- **NewDate_POContract** – The date less than or equal to the entry date when a Purchasing contract is still considered a new customer and subsequent transactional relevant requirements do not apply
- **NewDate_SOContract** – The date less than or equal to the entry date when a Sales Order contract is still considered a new customer and subsequent transactional relevant requirements do not apply

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.

Note that you can only define Old Days OR Old Date, you can not use both. The fields used are similar to those above on “Old Days”.

- **Vendors:**

- **OldDate_Contract** – The date that is less than the DocCreate for ttPurchHeader where PurchCat = K/L that the record is considered part of the relevant determination of Vendor

Note: please review that the indicated PurchCat(s) are appropriate to the client environment

- **OldDate_PO** – The date that is less than the DocCreate for ttPurchHeader where PurchCat = F/A that the record is considered part of the relevant determination of Vendor

Note: please review that the indicated PurchCat(s) are appropriate to the client environment

- **OldDate_APPayment** – The date that is less than the ClearingDate for ttAPHistory or PrintDate for ttPayments that the record is considered part of the relevant determination of Vendor

- **Customers:**

- **OldDate_SOContract** - The date that is less than the DocCreate for ttSalesHeader where the OrdCat = B/C that the record is considered part of the relevant determination of Customer

Note: please review that the indicated OrdCat(s) are appropriate to the client environment

- **OldDate_SO** - The date that is less than the DocCreate for ttSalesHeader where the OrdCat <> B/C that the record is considered part of the relevant determination of Customer

Note: please review that the indicated OrdCat(s) are appropriate to the client environment

- **OldDate_ARPayment** - The date that is less than the ClearingDate for ttARHistory or PrintDate for ttPayments that the record is considered part of the relevant determination of Customer

- **Materials:**

- **OldDate_MatMovement**
- **OldDate_ProductionOrder:**
- **OldDateMM** - The Date used to determine relevancy if ItemFinishDate or ActualFinishDate or SchedRelDate are greater than the defined date, the record will be considered part of the relevant determination of Material

- **No longer used:**

- **OldDaysP2P** – not currently used and can be utilized for customization purposes

- **OldDaysSD** – not currently used and can be utilized for customization purposes

2. Org Unit Values:

This is where you will specify which values are to be excluded from the dataset. The Org Units allowed here were configured in “Org Unit Type”. Example:

Z SOURCE	ORG UNIT TYPE	ORG UNIT VALUE
SAP_ECC	Customer Account Group	CPD
SAP_ECC	Customer Account Group	DEBI
SAP_ECC	Vendor Account Group	CPD
SAP_ECC	Vendor Account Group	PLNT
SAP_ECC	Company Code	2300
SAP_ECC	Company Code	SL01
SAP_ECC	Material Type	HIBE

This data is stored in the table **ztSourceRelevancyOrgUnit**, which contains by zSource, the *NOT* relevant OrgUnit(s) defined by the ztOrgUnit type table. If not populated, then all entries associated to that OrgUnit type are deemed relevant.

Org Unit definition is only for excluding specific org units, not for defining which are relevant. The reasoning is that by forcing the client to indicate Non-relevant values, all values will be taken into consideration versus just indicating relevant values and missing unused, little used or new values.

3. Override:

Override is where you will specify exact values to be included or excluded (or other Operands defined above). This section is specific to indicating records that will be excluded/ included based on criteria defined in Source Relevancy or Org Unit Values.

Excel integration has been enabled for this page so you can upload the values from a spreadsheet if needed.

Following are some examples for reference:

WAVE ID	Z SOURCE	OBJECT	OPERAND	LEGACY PRIMARY KEY	ACTIVE
Relevancy / Cross Ref / Reusable Code	SAP_ECC	Vendor Master Relevancy Processing	Exclude	0000000015	<input checked="" type="checkbox"/>
Relevancy / Cross Ref / Reusable Code	SAP_ECC	Vendor Master Relevancy Processing	Include	0000000025	<input checked="" type="checkbox"/>
Relevancy / Cross Ref / Reusable Code	SAP_ECC	Customer Master Relevancy Processing	Exclude	0000010302	<input checked="" type="checkbox"/>

Each entry can be flagged as Active or not.

Note that this Override will **not** supersede criteria for downstream objects. For example, if a BOM is included as relevant but one of the Materials on that BOM is on the Override page to be excluded, that Material will not actually be excluded because it is a component on a BOM that is relevant. You could however exclude the specific BOM itself.

The data for Overrides is stored in table **ztOverride**.

Note that this Override section in Source Relevancy is different from the Override main menu object in that it is Source specific when the Overrides are entered at the source level. The main menu Override option is not specific to a source but is a compilation of all Overrides across all zSources. Overrides can be entered via either option since the zSource is captured when the Override is defined.

Relevancy sequencing is as follows:

1. Relevancy is processed first against date/ days (Defined in the Vertical view of zSource). Records are flagged relevant or not based on the parameters provided. These can be superseded by Org Unit or Override definitions.
2. After dates have been used to include/ exclude records, Org Unit exclusions are then processed. If an item was flagged as relevant from date processing, it can be flagged as not relevant based on org unit exclusions. Org unit relevancy will always trump relevancy assigned based on dates/ days.
3. Final processing is done against the specific Overrides defined. However, Overrides must work in conjunction with Org Type definitions. Example: A Customer Account group is excluded in Org Types, but you add the Customer itself to the Override page. The Account Group flagged as not relevant will supersede the Customer assigned in the Override page – you will not be able to include the Customer if its Account Group is not relevant.

DSW Reports

psaCentralWave also includes a compilation of the reports that are generated in ADM for easier reference:



These reports can be found in Transform, Target Reports but are dynamically updated on this menu option for a central reference. Some examples include:

DSW Reports

NAME ▼	
tvAPHistory_DebugRulebookSel	
tvAPHistory_PostingDate_InvalidDateSel	
tvAPHistory_RulebookSel	
tvAPOpen_DebugRulebookSel	
tvAPOpen_RulebookSel	
tvARHistory_DebugRulebookSel	
tvARHistory_PostingDate_InvalidDateSel	

Security Configuration

Prior to users being able to login and view data in psaCentralWave, security must be configured. Users must be provisioned in DSP before they will be able to access the tool.

DSP Roles

PSA.User – End-user access

PSA.Administrator – Admin & configuration access

Navigate to the DSP Admin -> Security page.

1. Expand the security menu -> Expand the Security Defintions menu
2. Select Security Roles
3. Identify the Role(s) that require access to psaCentralWave

Scope of Relevancy

Once psaCentralWave has been installed and setup, it will pre-populate Objects required to support relevancy processing in Advanced Data Migration. The priorities of the Objects and Targets has been determined and should not be re-sequenced without significant review.

The system is delivered with the following Objects:

Central - Relevancy					
Console Design Map Construct Transform Integrate					
Objects					
PRIORITY	OBJECTID	DESCRIPTION			
0	Organizational Structure	Organizational Structure	3	1	
10	Business Transactions	Transactional Relevancy Processing	12	1	
20	Material Master Relevant	Material Master Relevancy Processing	9	1	
30	Customer Master Relevant	Customer Master Relevancy Processing	6	1	
40	Vendor Master Relevant	Vendor Master Relevancy Processing	5	1	
1000	Business Entity Relevant Only	Business Entity Relevant Records Only (Customers / Vendors)	1	1	
2000	Material Master Relevant Only	Material Master Relevant Records Only	1	1	

These objects have supporting Targets as follows:

- Organizational Structure

Note: not used in this version of psaCentralWave but can be leveraged as needed

PRIORITY	OBJECT	TARGET ID	DESCRIPTION			
10	Organizational Structure	ttOrgGroup	High level of Organizational Structure	1	1	1
20	Organizational Structure	ttOrgSubGroup	Low level of Organizational Structure	1	1	2

- Business Transactions

PRIORITY	OBJECT	TARGET ID	DESCRIPTION			
10	Business Transactions	ttAROpen	Accounts Receivable - Open	1	1	21
20	Business Transactions	ttAPOpen	Accounts Payable - Open	1	1	21
30	Business Transactions	ttARHistory	Accounts Receivable - History	1	1	19
40	Business Transactions	ttAPHistory	Accounts Payable - History	1	1	19
50	Business Transactions	ttPayments	Payments	1	1	14
60	Business Transactions	ttPurchHeader	Purchase Header	1	1	18
70	Business Transactions	ttPurchLine	Purchase Line	1	1	18
80	Business Transactions	ttSalesHeader	Sales Header	1	1	18
90	Business Transactions	ttSalesLine	Sales Line	1	1	16
100	Business Transactions	ttSalesPartners	Sales Partners	1	1	13
120	Business Transactions	ttProductionOrder	Production Orders	1	1	16
130	Business Transactions	ttMaterialMovement	Material Movements	1	1	21

- Material Master Relevant

PRIORITY ▼	OBJECT	TARGET ID	DESCRIPTION				
10	Material Master Relevant	ttMaterialSales	Material Sales	1	1		15
20	Material Master Relevant	ttMaterialLocation	Material Storage Locations	1	1		10
30	Material Master Relevant	ttMaterialPlant	Material Plants	1	1		28
40	Material Master Relevant	ttMaterial	Material Basic	1	1		47
50	Material Master Relevant	ttMaterialAltUOM	Material Alternate Unit of Measure	1	1		15
100	Material Master Relevant	ttBOMHeader	BOM Headers	2	1	1	33
110	Material Master Relevant	ttBOMComponent	BOM Component	2	1		38
120	Material Master	ttBOMExplosion	Relevant BOM Components via BOM Explosion	1	1		29

▪ Customer Master Relevant

PRIORITY ▼	OBJECT	TARGET ID	DESCRIPTION				
10	Customer Master Relevant	ttCustomerPartner	Customer Partners	1	1		17
20	Customer Master Relevant	ttCustomerCredit	Customer Credit	1	1		4
30	Customer Master Relevant	ttCustomerCompany	Customer Company	1	1		12
40	Customer Master Relevant	ttCustomerSales	Customer Sales	1	1		18
50	Customer Master Relevant	ttCustomerGeneral	Customer General	1	1		53

▪ Vendor Master Relevant

PRIORITY ▼	OBJECT	TARGET ID	DESCRIPTION				
10	Vendor Master Relevant	ttVendorPartner	Vendor Partner	1	1		15
20	Vendor Master Relevant	ttVendorCompany	Vendor Company	1	1		14
30	Vendor Master Relevant	ttVendorPurch	Vendor Purchasing	1	1		9
40	Vendor Master Relevant	ttVendorGeneral	Vendor General	1	1		46

▪ Business Entity Relevant Only – used for subsequent processing e.g. psaAddress, psaHarmonization

PRIORITY ▼	OBJECT	TARGET ID	DESCRIPTION				
10	Business Entity Relevant	ttBusinessPartner_Relevant	Customers, Vendors	3	1		

▪ Material Master Relevant Only – used for subsequent processing e.g. psaHarmonization

PRIORITY ▼	OBJECT	TARGET ID	DESCRIPTION				
100	Material Master Relevant	ttMaterial_Relevant	Materials	1	1	6	

NOTE: It is highly suggested that subsequent target processing utilize views back to dswCentral as the means to either:

Insert into Source only relevant records and utilize the reconciliation counts from the Relevancy process

Insert into Source all records and delete out non-relevant records

It is also highly suggested that the determination of account groups and material types occur within the relevancy processing so that any subsequent quality reporting can be written with the validation utilizing the “new” determination and not the old.

Following are the Primary relevancy transaction tables, used to define transaction activity that will drive Master Data object relevancy. They are included as a part of the “Business Transactions” object.

Each of these tables will need to be mapped to the legacy source to bring in system-agnostic fields. This should be completed via the standard ADM process (Design, Map, Transform, etc.). The PSA provides default mapping and processing for SAP_ECC. This mapping should be reviewed for any unique Client differences.

Note: The fastest way to get psaCentral Wave processing is to setup Collect to put the SAP_ECC tables into sdbSAP_ECC. For more than one SAP system, please reach out to SMT for viable options depending on the circumstances.

Target	Reason	Relevancy Object	Fields used
ttAROpen	Customers with Open Receivables within Company Code	Customers	CompanyCode
ttAPOpen	Vendors with Open Payables within Company Code	Vendors	CompanyCode
ttARHistory	Customers that have done any type of financial transaction within company code within relevancy period	Customers	CompanyCode, Clearing Date

Target	Reason	Relevancy Object	Fields used
ttAPHistory	Vendors that have done any type of financial transaction within company code within relevancy period	Vendors	Company Code, Clearing Date
ttPayments	Any payments to Customers/Vendors not through AR/AP ie. Brokers within Company code within relevancy period	Customer/Vendors	Company Code, Print Date
ttPurchHeader	Purchase orders/Contracts within relevancy period and relevant Purchase Org	Vendors and partners	DocDate, PurchOrg
ttPurchLine	Line items associated to relevant PO Headers within relevant plants	Vendors/Materials	PurchDoc on join, Plant
ttSalesHeader	Sales orders/Contracts within relevancy period and relevant Sales Org	Customers and partners	DocDate, SalesOrg
ttSalesLine	Line items associated to relevant SO Headers within relevant plants	Customers/Materials	SalesDoc on join, Plant
ttSalesPartners	All Sales Order partners to relevant SO	Customers and partners	SalesDoc on join

Target	Reason	Relevancy Object	Fields used
ttProductionOrder	All Production Orders where either the ProdHeader material number is populated and/or ProdLine material number is populated within relevant plants and within relevancy period. Item Finish Date is checked first then Actual Finish date then Schedule Release Date. Record is deleted if all three dates are not populated	Materials	MaterialNumber, HeadMatNumber, PlanningPlant, DeliveryPlant, SchedRelDate, ActualStartDate, ActualFinishDate, ItemFinishDate
ttMaterialMovement	All movements where the Material number is not blank	Materials	MoveDocDate Plant, CompCode MaterialNumber

Following are the Secondary transaction tables used to capture additional details for determining relevancy. These tables also require mapping to legacy tables and fields.

They can be found in the “Relevant” Objects (e.g., “Material Master Relevant”).

Target	Reason	Relevancy Object	Fields used
ttBOMHeader	Bill of Material Headers	Materials	
ttBOMComponent	Bill of Material Components	Materials	
tBOM Explosion	Explosion of all the materials tied to the BOMs up to the number of levels specified in xtSourceRelevancy	Materials	MaterialNumber and Plant
ttCustomerPartner	Customer is relevant if partnered to a relevant customer that is not itself	Customer	CustomerNumber, Sales Org, DistChannel, Division, ParentNumber

Target	Reason	Relevancy Object	Fields used
ttCustomerCompany	Customer Company is relevant if there is Open AR or AR History or within New Customer date range	Customer	CustomerNumber, CompanyCode, CreateDate
ttCustomerCredit	To populate credit amounts on Customer master for down stream use	Customer	CustomerNumber
ttCustomerSales	Customer Sales is relevant if there is Open Sales or Sales History or Sales Contract	Customer	CustomerNumber, Sales Org, DistChannel, Division, OrdCat, Status, DocDate
ttCustomerGeneral	Customer is relevant if any of the above records are relevant or is used in Sales Partners or is new	Customer	CustomerNumber, CustomerCreatedOn
ttVendorPartner	Vendor is relevant if partnered to a relevant vendor that is not itself	Vendor	
ttVendorPurch	Vendor Purchasing is relevant if there is Open PO or PO History or PO contracts	Vendor	VendorNumber, PurchOrg, PurchCat, Status
ttVendorCompany	Vendor Company is relevant if there is Open AP or AP History	Vendor	VendorNumber, CompanyCode
ttVendorGeneral	Vendor is relevant if any of the above records are relevant or is a partner to a relevant vendor or is new	Vendor	Vendor, VendorCreatedOn
ttMaterialSales	Material Sales is relevant if there is Open Sales or Sales History or Sales Contract or used a pricing reference material	Material	MaterialNumber, SalesOrg, DistChannel

Target	Reason	Relevancy Object	Fields used
ttMaterialLocation	Material Location is brought in for later use on inventory levels	Material	MaterialNumber, Plant, Rest Stock, Unrest Stock
ttMaterialPlant	Material Plant is relevant if there is a Open PO, PO History, Open SO, Sales Order History, PO Contract, SO Contract, Inventory levels	Material	MaterialNumber, Plant
ttMaterial	Material is relevant if any of the above are relevant or is used on a BOM	Material	MaterialNumber

Naming Conventions

The Relevancy tool follows Syniti naming conventions. SQL objects are named as follows:

stCusotmerSales_SAP_ECC_KNVV = Source Table

Source tables contain source data used for an application or migration in the data model that corresponds to the system it originated from.

ttCustomerSales = Target Table

Target tables contain staged or application data in generically named fields.

tvMaterialLocation_zRelevant_IsFalseSel = Target View (Select)

Target views are reports or other saved views related to transformed or application data.

svLFA1_Mariposa_EKPO_POsFromMariposaSel = Source View (Select)

Source views are reports or other saved reference data that is limited to data in a source system.

ztSource_Relevancy = Configuration Table

Configuration tables contain lists of values, parameters, or other configuration elements.

xtLFA1 = Cross Reference

Cross-references provide source-to-target or other tabular data references.

Design Notes

Target Design

- Key fields are always set and include zSource
- zRevelant is set to True in the design (deemed relevant) as well as any other Bit type fields. The target rules update the zRelevant flag as needed to 0.

- zRelevantOverrideReason is there for Indication of which relevancy criteria was used to determine status of non-relevant. If a record is deemed not relevant due to Org Unit relevancy rule, an specific object key inclusion will not override that rule. For example, a customer is tied to an account group deemed not relevant but that customer is in the inclusion list. The relevancy will not be overridden since it is assumed that the account group will not exist. This field can be used for further reasons, however, it is suggested to place the new rules toward the end.
- Target is always brought into the System type for dswCentral through Platform> Common> System Types > vertical of CentralWave > Import button
- Target is brought into Design through either the target table or the system type, all fields are marked active
- All of standard ADM automation performs as expected

Source Design

- Tables are created as part of automation with zActive coming in as part of the defaulted overall utility fields and defaulted to 1
- .For transactional processing, the zActive field is defined on the vertical of the source for the where clause well as defined in psaPerformanceBench. If there is a performance issue in the handling of excessive records being placed into the target tables before being deleted due to non-relevancy, the relevancy rules can be copied and adjusted to the appropriate source fields and utilize zActive=0 to remove them from the insert
- Source is always brought into the System type for dswCentral through Platform> Common> System Types > vertical of CentralWave > Import button
- Source can be brought into MAP and mapped allowing the automation engine to create and register the subsequent views and rules. If Mapping is created or changed (from the pre-delivered SAP_ECC) mapping and the target is a transactional target, automation should be rule then psaPerformanceBench mapping will need to be refreshed and the rules re-created to take into consideration the mapping changes

Target Rules

Transaction based target tables

- Checking of Old Days and Old Date sets the zDelete flag
- Checking of non-relevant Organizational Units sets the zDelete flag
- Missing master data elements can set the zDelete Flag
- Registered Rule 100 – Deletes flagged records from the target table

Master target tables

- Updates from associated target transaction tables of counts, flag and total
- Update of zNew flag from comparing Data or Days from ztSourceRelevancy
- Registered Rule 100 – Flags the records relevant based on the set of flags from all the associated transaction tables

- Registered Rule 110(s) – Flags non-relevant records according to the Org Unit exclusion list
 - Note: If the Org Unit in question is Account Group or Material Type, there are rules that will exclude associated master data records in previously processed target. Example: Customer account group Z100 is not relevant, then Customer Company, Sales, Partner records will also be designated not relevant

This is WHY all of the associated reports are at the end of processing the object.

- Registered Rule 120(s) – Flags non-relevant records according to the Override Exclusion list
- Registered Rule 130(s) – Flags relevant records according to the Override Inclusion list IF not excluded due to Org Unit exclusion list

Note: There has been provided fields where the “New” material type or account group can be determined and utilized within future reporting requirements. It is suggested to place all the rules determining account group in this processing area and to access them when running the actual migration targets

Transaction based source tables

- All rules are generated through MAP and Automation
- It is assumed that only one client is in the source tables (controlled through the collect packages)
- If psaPerformanceBench is utilized, the automatically rules will be marked BulkUpd and several Stored Procedure rules will be generated that aggregate the Copy, Xref and Default rules into a single Stored Procedure. There will be a new insert into Source Stored Procedure and well as a new insert into Target

Master source tables

- All rules and inserts are generated through MAP and Automation
- It is assumed that only one client is in the source tables (controlled through the collect packages)

Note: It is highly suggested that ALL master records are brought into target so that reconciliation numbers are easier to validate from source to target.