

Syniti Solutions psaDataFilter

Installation, Configuration & User Guide

Contents

Overview	1
Install psaDataFilter	1
Download the Application & License	1
Install the License	2
Install the Application	2
Configure psaDataFilter	4
User Guide	6
Data Source	6
Org Field Summary	7
Table Filters Status	8
All Table Filters	9
Summary Counts By Field	9
Approvals	11
Priority Summary	11
Admin Table Filters	11
Distinct Key Summary	14
Table Retention Rules	15
Priority Table	16
Table Filter Templates	17
Table Org Field Assignments	18
Schedule Group Priority	19
Generate Log	19
Parameters	21

Overview

psaDataFilter – Application is used as a divestiture tool to split data from a current ERP System into table format as a source for a new target system. The tool uses collect to extract the initial data tables. Organizational Field filters are created in the psaDataFilter application. Build Filters process will create the views that will extract only the data to be spent to the new company.

Key Features:

- DataSource auto generate to save days of manual building of the rules
- Multiple ESP systems can be processed in a single platform.
- Ability to auto generate collect packages once target and source have been registered
- Ability to build 600 table filters for the SAP template process
- Ability to design more templates quickly as the business needs change.
- Organizational Field data filters are easily defined
- Data Retention Rules can be created and added to the download when large amounts of data need to be excluded from the processing
- Approval History showing all the data moving from filter format to approved data
- Build Process is no destructive allowing new templates to be added while in development
- Business Users have easy access to view data in a web page or download an XLSX file.
- Priority fields have been established to schedule filtering and reviewing of tables.

Install psaDataFilter

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

Download the Application & License

The psaDataFilter 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 **psaDataFilter.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.

10) Navigate to DSP install\Databases and execute file **psaDataFilter_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 psaDataFilter

Perform the following steps to configure psaDataFilter:

1. Create a Datasource connecting to Source System
 - a. To create a datasource, navigate to Common > Configuration > Data Source Registry and click “Add”
 - b. Specify “External System Connection” as the Application Data Source Type
 - c. Add connection specific information
2. Create a Database named sdbSAP and register a DataSource
 - a. To create a database in SQL, open up SQL Server Management Studio and then click “New Query” and type the command
 - i. **CREATE DATABASE sdbSAP**
 - b. To create a datasource, navigate to Common > Configuration > Data Source Registry and click “Add”
 - c. Specify “Migration Source Database (sdb%)” as the Application Data Source Type
 - d. Add connection specific information
3. Create a Database named sdbSAP_Filtered and register a Datasource
 - a. To create a database in SQL, open up SQL Server Management Studio and then click “New Query” and type the command
 - i. **CREATE DATABASE sdbSAP_Filtered**
 - b. To create a datasource, navigate to Common > Configuration > Data Source Registry and click “Add”
 - c. Specify “Migration Source Database (sdb%)” as the Application Data Source Type
 - d. Add connection specific information
4. Create a Database named sdbSAP_Approved and register a Datasource
 - a. To create a database in SQL, open up SQL Server Management Studio and then click “New Query” and type the command
 - i. **CREATE DATABASE sdbSAP_Approved**
 - b. To create a datasource, navigate to Common > Configuration > Data Source Registry and click “Add”
 - c. Specify “Migration Source Database (sdb%)” as the Application Data Source Type
 - d. Add connection specific information
5. In DSP, navigate to Collect
6. Register sdbSAP as a Target and your source as the Target Source
7. Verify Target and Source test connection works
8. Register sdbSAP_Filter Target and psaDataFilter as a Target Source
9. In DSP, navigate to psaDataFilter
10. Click on the DataSource page
11. Click Add
 - a. Set sdbSAP as the Data Source ID
 - b. Set sdbSAP as the Source Data Source ID
 - c. Set SAP as the System Type
 - d. Set sdbSAP_Filtered as the Filter Data Source ID
 - e. Set sdbSAP_Approved as the Approved Data Source ID

12. Click “Build Collect” Button to start the table registration and package build. (Wait a couple of hours for process to be completed.)
13. Click “Build Table Filters” to start the table registration and package build. (Wait a couple of hours for process to be completed.)
14. Click “Add Data Retention Filter” to add Where Clauses for the connection to remove millions of records from the filter.
 - a. Configure filter as needed
 - b. When finished, navigate back to the Data Source page in psaDataFilter
15. Click “Add Filter” to create new Organization Fields. These values will process during the Filter cycle.
 - a. Configure filter as needed
16. Review the data looking for retention years, org filters applied and distinct keys used.
17. Once complete, navigate to Configuration > Admin Table Filters.
 - a. Mark the Table as READY FOR REVIEW
18. Review the data or download the XLS files.
19. Approved the Data or Reject the data and add a comment to explain what is wrong with the filters.
20. Users can mark a table for automatic approval for future filtering cycles.

If the Navigation pane in DSP doesn’t show psaDataFilter, then try these steps:

21. Log in to the DSP site as an Administrator.
22. Select **Admin > Configuration > Product License** in the Navigation pane.
 - a. Ensure that psaDataFilter appears here.
23. Select **Admin > Configuration > Site Menu** in the Navigation pane.
 - a. Ensure that psaDataFilter appears here. If not, then:
 - i. Click **Add**.
 - ii. Enter a priority in the **PRIORITY** field.
 - iii. Enter **psaDataFilter** as the label for the site menu option in the **LABEL** field.
 - iv. Select the **psaDataFilter : psaDataFilter** page from the **LINK TO PAGE ID** list box.
24. Select **Admin > Configuration > Parameters** in the Navigation pane.
 - a. Click **Clear Cache**.
 - b. Reload the browser tab.

If you still can’t reach the psaDataFilter application, then review the “Define Security Roles” article in the DSP Online Help to ensure that your DSP user has access to psaDataFilter. 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.

User Guide

Data Source

Data Source Page displays the configuration being used to split the data from Source System into the filter database and final approved database.

This system can as many source ERP Systems into Filtered and Approved databases.

The following steps are completed for the user with a click of a button:

- a) Build Collect will create the table registrations for collect and build the Assembly packages. This process will take a couple of hours for all the packages and tables to be built.
- b) Build Table Filters will create the collect registrations for the filter views. Process will be all post views and rules to create distinct keys. This process will a few minutes to create all the registrations but a couple of hours to build all the Assembly packages.
- c) Add Data Retention Filters are for large tables that need to be filtered on the download.
- d) Add Filter will add organizational field filters for the process.

The screenshot displays the 'DataSource' configuration page in the 'psaDataFilter' application. On the left, a green sidebar menu lists various navigation options, with 'Configuration' expanded to show 'Reports' and 'Admin'. The main content area features a table with the following columns: DATA SOURCE ID, SOURCE DATA SOURCE ID, SYSTEM TYPE, FILTER DATA SOURCE ID, and APPROVE DATA SOURCE ID. A single data row is visible with the following values: DE3, sdbSAP, dgSAP, SAP, sdbSAP_Filtered, and sdbSAP_Approved. Above the table, there are 'Add' and 'Edit' buttons, and a dropdown menu currently showing 'Z SOURCE'.

Org Field Summary

Summary of data value assigned to key fields per zSource. The application can filter multiple SAP systems as well as different ERP systems in the same application. Click on Filter Values to add a new value or click on Organizational Fields to add a value for the first time.

Z SOURCE	FIELDNAME	DESCRIPTION	FILTER VALUES
DE3	BUKRS	Company Code	2
DE3	WERKS	Plant	1

Web Page to enter value for Fields

Z SOURCE	CLIENT	FIELDNAME	FIELD VALUE	DESCRIPTION
DE3	100	BUKRS	1000	Company Code
DE3	100	BUKRS	CA01	Company Code
DE3	100	WERKS	1000	Plant

Z SOURCE	CLIENT	FIELDNAME	FIELD VALUE	DESCRIPTION
DE3	100	[Choose one]	00	Plant

- BUKRS
- EKORG
- GSBER
- KOKRS
- LGNUM

Table Filters Status

Table Filter Status by zSource and displaying number of tables.

List of Statuses defined in the application:

Initial Status:

Not In Scope – Tables being excluded from the filtering process

New – Initial table status before any filters have been executed

Working Status:

Filtering in Process – Filtering work has begun on this table. This table may include research on Parent/Child field relationships.

Filter Complete – Collect has processed the filter using the defined Organizational Fields or Distinct keys from the Parent tables.

Business User Status to respond to:

No Data in Full Record Set– No Data in the source system for the table

No Filter Data – No data after the Organizational fields have been applied.

Ready For Review – Consultants have run the filters and find the data ready

Business User Response:

Approved – Client Data stewards approve the data

Rejected – Client Data stewards reject the filters

Automatic Approval – Client Data Stewards approval all runs after the initial approval

S	Z SOURCE ▼ ²	FILTER STATUS	TABLES
	DE3	Not In Scope	18
	DE3	New	468
	DE3	Approved	4

All Table Filters

Table Filters display all the Tables being filtered by the application. It will display the View Name, Organization Fields, Distinct Keys built from parent tables, as well as Create Distinct Key to be used by child tables. Business users can Approve or Reject the filter results. There is a comment field for users to identify the issue with the filter if rejected.

On the far right of the screen, there will be a button for View Data to see the first 10,000 records. The page will display the full record count, the filter record count and approved record count if previous approved. A download file ICON will allow a user to download the data into an XLS file.

The APPROVED toolbar is the only option to get filtered data into the approved database. The Automatic Approval will load the data into the table, if the table has been approved one time by the business user.

Table Filters													
<input type="button" value="Edit"/> 🔒 + ✖													
🔗	S	SYSTEM TYPE ▼	TABLE	Z SOURCE	PRIORITY	TABLE	TABLE DESCRIPTION	FILTER TYPE	VIEW NAME	ORGANIZATION FIELDS	USED DISTINCT KEY TYPES	CRE	
🔗	🔗	SAP	Data	DE3	Priority 3	A003	Tax Classification	All Records					
🔗	🔗	SAP	Data	DE3	Priority 2	A017	Material Info Record (Plant-Specific)	Both	FILTER_A017_DE3	EKORG, WERKS	Material, Vendor		
🔗	🔗	SAP	Data	DE3	Priority 2	A018	Material Info Record						
🔗	🔗	SAP	Data	DE3	Priority 3	ADCP	Person/Address Assignment (Business Address Services)	Distinct Key	FILTER_ADCP_DE3		AddressNumber		
🔗	🔗	SAP	Data	DE3	Priority 3	ADR2	Telephone Numbers (Business Address Services)	Distinct Key	FILTER_ADR2_DE3		AddressNumber		
🔗	🔗	SAP	Data	DE3	Priority 3	ADR3	Fax Numbers (Business Address Services)	Distinct Key	FILTER_ADR3_DE3		AddressNumber		
🔗	🔗	SAP	Data	DE3	Priority 1	ADR6	E-Mail Addresses (Business Address Services)	Distinct Key	FILTER_ADR6_DE3		AddressNumber		
🔗	🔗	SAP	Data	DE3	Priority 3	ADRC	Addresses (Business Address Services)	Distinct Key	FILTER_ADRC_DE3		AddressNumber		
🔗	🔗	SAP	Data	DE3	Priority 3	ADRCT	Address Texts (Business Address Services)	Distinct Key	FILTER_ADRCT_DE3		AddressNumber		
🔗	🔗	SAP	Data	DE3	Priority 3	ADRP	Persons (Business Address Services)	Distinct Key	FILTER_ADRP_DE3		PersonnelNumber		
🔗	🔗	SAP	Data	DE3	Priority 3	ADRT	Communication Data Text (Business Address Services)	Distinct Key	FILTER_ADRT_DE3		AddressNumber		
🔗	🔗	SAP	Data	DE3	Priority 4	AEIH	Maintenance order	Distinct Key	FILTER_AEIH_DE3		OrderNumber		

Summary Counts By Field

Filter tables can be split into by organization data field for data verification.

Copyright © 2020 BackOffice Associates, LLC, d/b/a Syniti and/or its affiliates. All rights reserved. This document contains confidential and proprietary information and reproduction is prohibited unless authorized by BackOffice Associates®. Other names appearing within the product manuals may be trademarks of their respective owners.

On the Admin Table Filter enter the field name in Filter Table Field. When the Filter View executes in Collect, it will populate the filter value settings in this table.

Z SOURCE	TABLE NAME	FIELDNAME	FIELD VALUE	RECORD COUNT
DE3	LFB1	BUKRS	1000	43
DE3	LFB1	BUKRS	CA01	1381

Example of enter a Filter Table to be split by Summary Counts.

Enter

Admin Table Filters

Add Edit

	SYSTEM TYPE	TABLE	Z SOURCE	PRIORITY	TABLE	TABLE DESCRIPTION	FILTER TYPE	FILTER TABLE FIELD	VIEW NAME	ORGA
	SAP	Data	DE3	Priority 1	LFB1	Vendor Master (Company Code)	Organizational Field	BUKRS	FILTER_LFB1_DE3	B

Approvals

Approvals page will display every filter table with the user id, approved on and the matching approved audit file. On large projects, this page will display 1,000's of records when all the tables have been completed. It will maintain the approvals for each mock load until the go-live date.

Approval History								
ID ▲	SYSTEM TYPE	TABLE	Z SOURCE	RECORD COUNT	STATUS	APPROVER	APPROVED ON	APPROVED AUDIT FILE
2	SAP	MARC	DE3	25005	Approved	DDowney	8/15/2019 8:06:00 PM	D:_Data\DSPDEV1\FilePath\DSWAP
1	SAP	MARA	DE3	25005	Approved	DDowney	8/15/2019 7:56:00 PM	D:_Data\DSPDEV1\FilePath\DSWAP

Priority Summary

Priority Summary will display table status showing all tables counts, working status, ready to review status and approved table status.

Priority Summary

SYSTEM TYPE ▼ ¹	Z SOURCE ▼ ²	PRIORITY ▼ ³	ALL TABLES	WORKING TABLES	WORKING PERCENT	READY TABLES	READY PERCENT	APPROVED TA
SAP	DE3	Priority 1	<u>137</u>	4	2	4	2	
SAP	DE3	Priority 2	<u>88</u>	0	0	0	0	
SAP	DE3	Priority 3	<u>158</u>	0	0	0	0	
SAP	DE3	Priority 4	<u>42</u>	0	0	0	0	
SAP	DE3	Priority 5	<u>65</u>	0	0	0	0	

Admin Table Filters

Admin Table Filters is the page for Administrators to make table adjustments for Priority, System Types, zSource and many other objects. Consultants should do all their work on this page. The Table Filter page is for the Business Users making approvals or rejections.

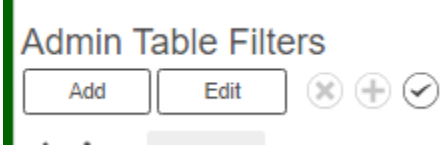
Tables “NOT IN SCOPE” should be excluded from the Filtering Approval process.
Tables can be marked inactive in collect but it is not updated after the initial Build.
New tables can be moved to “NOT IN SCOPE” by processing the “X” icon on the page toolbar.



Tables change to “NEW” status are ready to be filter processed.
Tables in “NOT IN SCOPE” can be moved back to “NEW” by clicking the “+” icon on the page toolbar.



Table can be marked “Ready for Review” by clicking the Checkmark icon on the page toolbar.
This will let the business know the tables are ready for review.



Admin Table Filters

Add Edit ✕ + ✓

			SYSTEM TYPE	TABLE	Z SOURCE	PRIORITY	TABLE	TABLE DESCRIPTION	FILTER TYPE	FILTER TABLE FIELD	FILTER STATUS	FULL RECORD COUNT	FILTER TABLE COUNT	APPROVED COUNT	VIEW
			SAP	Data	DE3		A003	Tax Classification	All Records		New				
			SAP	Data	DE3	Priority 2	A017	Material Info Record (Plant-Specific)	Both		NEW	0			FILTER
			SAP	Data	DE3	Priority 2	A018	Material Info Record			NEW	0			
			SAP	Data	DE3	Priority 3	ADCP	Person/Address Assignment (Business Address Services)	Distinct Key		NEW	68			FILTER
			SAP	Data	DE3	Priority 3	ADR2	Telephone Numbers (Business Address Services)	Distinct Key		NEW	4			FILTER
			SAP	Data	DE3	Priority 3	ADR3	Fax Numbers (Business Address Services)	Distinct Key		NEW	0			FILTER
			SAP	Data	DE3	Priority 1	ADR6	E-Mail Addresses (Business Address Services)	Distinct Key		New	1			FILTER
			SAP	Data	DE3	Priority 3	ADRC	Addresses (Business Address Services)	Distinct Key		NEW	56,676			FILTER
			SAP	Data	DE3	Priority 3	ADRCT	Address Texts (Business Address Services)	Distinct Key		NEW	0			FILTER
			SAP	Data	DE3	Priority 3	ADRP	Persons (Business Address Services)	Distinct Key		NEW	69			FILTER
			SAP	Data	DE3	Priority 3	ADRT	Communication Data Text (Business Address Services)	Distinct Key		NEW	0			FILTER
			SAP	Data	DE3	Priority 4	AFIH	Maintenance order header	Distinct Key		NEW	0			FILTER
			SAP	Data	DE3	Priority 4	AFKO	Order header data PP	Distinct Key		NEW	0			FILTER

Distinct Key Summary

Distinct Key Summary shows the keys generated during the filtering processing cycle. These are the parent-child dependencies for the view containing these joins.

The “X” icon on the page toolbar will reset all Keys for the next cycle of processing. Distinct Keys will be copied to a backup table for audit reviews but all filters have to be reprocessed to build all the keys again.

psaDataFilter

- psaDataFilter
- DataSource
- Org Field Summary
- Organizational Fields
- Filter Status
- All Table Filters
- Summary Counts By Field
- Approvals
- Priority Summary
- ▼ Configuration
 - Admin Table Filters
 - Distinct Keys
 - Table Retention Rules
 - Priority Table
 - Table Filter Template
 - Table Org Field
 - Schedule Group Priority
 - Generate Log
 - Parameter
 - License
 - Reports
 - Admin

Distinct Keys Summary

4 rows

Z SOURCE ▼	CLIENT	KEY TYPE	
DE3	100	CharacteristicInternalNumber	25005
DE3	100	CharacteristicObject	25005
DE3	100	Material	25005
DE3	100	Vendor	1424

Distinct Key Details

z Source DE3 Key Type CharacteristicInternalNumber

Z SOURCE ▼	CLIENT	KEY TYPE	KEY VALUE1	KEY VALUE2	KEY VALUE3	KEY VALUE4
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000001		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000002		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000003		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000004		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000006		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000007		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000008		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000009		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000011		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000012		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000013		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000023		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000038		
DE3	100	CharacteristicInternalNumber	MARA	00000000000000000043		

Table Retention Rules

Table Retention Rules are used as a WHERE CLAUSE on the initial download when millions of records are to be excluded before the filter process. Retention Rules can also run post posting SQL to read several tables and create unique lists like material or customer or vendors reading transactional tables for relevancy.

Click the “Update Collect” button on the page toolbar to update the where clause. The page below will show the retention rule as well as the where clause on the collect package. It may take 1-2 minutes to process the package as a background build.

SQL Commands will process as an after rule when the database has been downloaded. It is a key process to read or update data across multiple tables. It will display in the download table as an after rule.

psaDataFilter

- psaDataFilter
- DataSource
- Org Field Summary
- Organizational Fields
- Filter Status
- All Table Filters
- Summary Counts By Field
- Approvals
- Priority Summary
- ▼ Configuration
- Admin Table Filters
- Distinct Keys
- Table Retention Rules
- Priority Table
- Table Filter Template
- Table Org Field
- Schedule Group Priority
- Generate Log
- Parameter
- License
- Reports
- Admin

Table Retention Rules

Add
Edit
⬇

	SYSTEM TYPE ▼	Z SOURCE	TABLE	RULE TYPE	PROCESS ORDER	WHERE CLAUSE
	COMMENTS					SQLCMD
✎	SAP	DE3	AUFK	Where Filter	10	WHERE ERDAT LIKE N'201%' OR AEDAT LIKE
	Download all data for 2010 or newer.					
✎	SAP	DE3	BKPF	Where Filter	10	WHERE GJAHR LIKE '201%'
	Download all Data For 2010 and newer.					
	GL Header					
	This table is not being USED for Customers, Vendors or Materials. It is just a 10 Year Data Filter.					
✎	SAP	DE3	BSAK	Post Rule	20	DELETE FROM sdbSAP.dbo.BSAK WHERE BU
	BSAK is part of the list of steps used to create customer listed active in the last 10 years. This is the DELETE RULE to remove NOT IN SCOPE BUKRS					
	=====					
	STEP 1) EKKO DOWNLOAD FILTER WHERE AEDAT Like '201%' - Build Sales Doc List					
	STEP 2) REMOVE ALL BURKS NOT IN FILTER -- DELETE FROM sdbSAP.dbo.BSAK WHERE BUKRS NOT IN (SELECT [FieldValue] FROM [psaDataFilter].[dbo].[ztOrganizationFieldFilter] WHERE FIELDNAME = 'BUKRS')					
	STEP 3) BSIK WHERE GJAHR LIKE '201%' Filter for the last 10 years Then delete BURKS not in the Organization Filter list					

Priority Table

Priority Table help track the work progress of all the tables. Define priority on this page for each table. The Admin Table Filter can then be used as an override for the Priority Summary page. Tables marked “NOT IN SCOPE” on the Filter Status should not have a Priority on the Admin Filter Table page.

psaDataFilter will be updated as developers process data and marked ready for review.

psaDataFilter

- psaDataFilter
- DataSource
- Org Field Summary
- Organizational Fields
- Filter Status
- All Table Filters
- Summary Counts By Field
- Approvals
- Priority Summary
- ▼ Configuration
 - Admin Table Filters
 - Distinct Keys
 - Table Retention Rules
 - Priority Table
 - Table Filter Template
 - Table Org Field
 - Schedule Group Priority
 - Generate Log
 - Parameter
 - License
- Reports
- Admin

Priority Table

	S	PRIORITY LIST ▼	TABLE	DESCRIPTION	CLIENT COMMENTS	DATA FILTER COMPLETED BY	DA CC
		Priority 1	ADR6	E-Mail Addresses (Business Address Services)			
		Priority 1	AUSP	Characteristic Values	AUSP Values	Characteristic	
		Priority 1	BCST	User-specific settings in configurator			
		Priority 1	BNKA	Bank master record			
		Priority 1	CABN	Characteristic			
		Priority 1	CABN_EXCL	Characteristics That Are Excluded for Type Matching			
		Priority 1	CABNNEW	Characteristic			
		Priority 1	CABNT	Characteristic Descriptions			
		Priority 1	CABNZ	Assignment of Table Fields to Characteristics			
		Priority 1	CABS	Result of the Statistical Analysis of Table AUSP			
		Priority 1	CAWN	Characteristic values			
		Priority 1	CAWNT	Value Texts			
		Priority 1	CDCND	Configuration: Direct Conditions Data Type:CHAR			
		Priority 1	CECUFM	Configuration editor: design: format			
		Priority 1	CECUSD	Configuration editor: design: basic data			
		Priority 1	CECUSDT	Configuration editor: design: descriptions			
		Priority 1	CECUSF	Configuration editor: design: borders			

Table Filter Templates

psaDataFilter has 600 predefined table filter to be published and start the filter process quickly. Filter status by default is “NEW” and the tables are published from the DataSource Page. Please review these templates update if needed.

These filters are processed on the DataSource page when the “BUILD TABLE FILTER” is clicked.

Table Filter Template

Add Edit

600 rows

SYSTEM TYPE	TABLE	TABLE	FILTER TYPE	FILTER STATUS	DOWNLOAD GROUP	DOWNLOAD PRIORITY	DOWNLOAD SINGLE THREAD	FILTER GROUP	FILTER PRIORITY	FILTER SINGLE THREAD	
TABLE DESCRIPTION				COMMENTS							
SAP	A003	Data Tables	Distinct Key	NEW	NoGroup	99999		Other	99999		
Tax Classification											
SAP	A017	Data Tables	Both	NEW	NoGroup	99999		Other	5500	✓	
Material Info Record (Plant-Specific)											
SAP	A018	Data Tables	Both	NEW	NoGroup	99999		Other	99999	✓	
Material Info Record											

Table Filter Template Syntax

Add Edit

1 rows

SYSTEM TYPE	TABLE	ORDER	OBJECT TYPE	REGISTER AS COLLECT TABLE	REGISTER AS COLLECT RULE	OBJECT NAME	SYNTAX
SAP	A003	10	psaView	✓		FILTER_A003_#zSource#	<pre>CREATE VIEW [dbo].[FILTER_A003_#zSource#] AS SELECT [#SourceSAP#].dbo.A003.* FROM [#SourceSAP#].dbo.A003 INNER JOIN dbo.fvDistinctKeyLists_PriceCondition ON [#SourceSAP#].dbo.A003.MANDT = dbo.fvDistinctKeyLists_PriceCondition.MANDT AND [#SourceSAP#].dbo.A003.KNUMH = dbo.fvDistinctKeyLists_PriceCondition.KeyValue1 WHERE fvDistinctKeyLists_PriceCondition.ZSource = #zSource#</pre>

Table Org Field Assignments

Organization Fields must be assigned to table for documentation purposes. The template used in the generation must have reference to the correct Org File filter views.

If new Table Organization Fields are added, then create new views like fvDistinctKeyLists_SalesOrder as an example. This view will have the Field filter and then will be added to the table filter templates.

Table Org Field Description 🔍 ⚙️ 9 rows

Add
Edit
📄

	ORGANIZATION FIELD NAME ▼	DESCRIPTION	TABLES	
✎	BUKRS	Company Code	40	🗑
✎	EKORG	Purch Organization	8	🗑
✎	GSBER	Business Area	Tables	🗑
✎	KOKRS	Controlling Area	2	🗑
✎	LGNUM	Warehouse Number	2	🗑
✎	MANDT	Client	9	🗑
✎	VKORG	Sales Organization	6	🗑
✎	VTWEG	Distribution Channel	16	🗑
✎	WERKS	Plant	60	🗑

Table Org Field System Tables 🔍 ⚙️ 40 rows

Add
Edit

Organization Field Name
BUKRS

	ORGANIZATION FIELD NAME ▼	TABLE	SYSTEM TYPE	
✎	BUKRS	ANEA	SAP	🗑
✎	BUKRS	ANEP	SAP	🗑
✎	BUKRS	ANLA	SAP	🗑
✎	BUKRS	ANLB	SAP	🗑
✎	BUKRS	ANLC	SAP	🗑
✎	BUKRS	ANLV	SAP	🗑
✎	BUKRS	ANLW	SAP	🗑
✎	BUKRS	ANLZ	SAP	🗑

Schedule Group Priority

Schedule Groups contains the order in which tables should be download in the Filtered Target. Tables in the group run in single thread to maintain Parent-Child relations for the Distinct Key build process.

Clicking the “Refresh” button on the record will download the tables for that group. The page will pull the latest start and finish time for each group based on the results in collect.

Schedule Group Priority

	PRIORITY ▼ ³	TARGET ▼ ¹	SOURCE ▼ ²	SCHEDULE GROUP ▼ ⁴	DESCRIPTION	COMMENT	AC
	10	sdbP3Filtered	psaDataFilter	CapacityID - CapacityID	Capacity	Does not rely on any other groups	
	10	sdbP3Filtered	psaDataFilter	Config - Config and T tables	Config and T tables	Configuration and t tables. Most of which are configured to be all records sent	
	10	sdbP3Filtered	psaDataFilter	COObjects - CO Objects	CO Objects	Does not rely on any other groups	
	10	sdbP3Filtered	psaDataFilter	Document - Document	Document	Does not rely on any other groups	
	10	sdbP3Filtered	psaDataFilter	Materials - Materials	Materials	Does not rely on any other groups	
	10	sdbP3Filtered	psaDataFilter	ProfitCenter - ProfitCenter	ProfitCenter	Does not rely on any other groups	
	10	sdbP3Filtered	psaDataFilter	Project - Project	Project	Does not rely on any other groups	
	10	sdbP3Filtered	psaDataFilter	Sales - Sales	Sales	Does not rely on any other groups	
	20	sdbP3Filtered	psaDataFilter	Customer - Customer	Customer		
	20	sdbP3Filtered	psaDataFilter	GLAccount - GLAccount	GLAccount	After materials	
	20	sdbP3Filtered	psaDataFilter	Order - Order	OrderItem / Routing / Quality	QALS Requires Material before running	
	30	sdbP3Filtered	psaDataFilter	Address and Vendor - Address and Vendor	Address and Vendor	Customers and Material need to run before address	
	30	sdbP3Filtered	psaDataFilter	Conditional Record Number - Conditional Record Number	Conditional Record Number	Material and Customer must run first	
	40	sdbP3Filtered	psaDataFilter	Classification - Classification	Classification		
	50	sdbP3Filtered	psaDataFilter	Other - Other	Other	Material and Customer need to run before	
	60	sdbP3Filtered	psaDataFilter	SAP Text Tables - SAP Text Tables	SAP Text Tables	Must run after all other tables	

Generate Log

Generate Log are built during Build Collect or Build Table Filters from the DataSource page. The SQL commands are non-destructive to existing objects. If an object is not generated, review this log page for error messages. The template can be generated for multiple SAP Systems.

- psaDataFilter
- psaDataFilter
- DataSource
- Org Field Summary
- Organizational Fields
- Filter Status
- All Table Filters
- Summary Counts By Field
- Approvals
- Priority Summary
- ▼ Configuration
 - Admin Table Filters
 - Distinct Keys
 - Table Retention Rules
 - Priority Table
 - Table Filter Template
 - Table Org Field
 - Schedule Group Priority
- Generate Log
- Parameter
- License
- Reports
- Admin

Generate Log

ID ▲	TABLE	Z SOURCE	LOGDATE	SQL
7506	WYT3	DE3	8/21/2019 1:09:00 PM	CREATE VIEW [dbo].[FILTER_WYT3_DE3] AS SELECT sdbSAP.dbo.WYT3.* FROM sdbSAP.dbo.WYT3 INNER JOIN fvDistinctKeyLists_Vendor ON sdbSAP.dbo.WYT3.MANDT = fvDistinctKeyLists_Vendor.MANDT AND fvDistinctKeyLists_Vendor.KeyValue1 INNER JOIN dbo.fvOrganizationFieldFilter_EKORG ON dbo.fvOrganizationFieldFilter_EKORG.MANDT AND sdbSAP.dbo.WYT3.EKORG = dbo.fvOrganizationFieldFilter_EKORG.fvDistinctKeyLists_Vendor.zSource = 'DE3' AND fvOrganizationFieldFilter_EKORG.zSource = 'DE3'
7505	VTTS	DE3	8/21/2019 1:09:00 PM	CREATE VIEW [dbo].[FILTER_VTTS_DE3] AS SELECT [sdbSAP].dbo.VTTS.* FROM [sdbSAP].dbo.VTTS INNER JOIN fvDistinctKeyLists_Shipment ON [sdbSAP].dbo.VTTS.MANDT = fvDistinctKeyLists_Shipment.MANDT AND fvDistinctKeyLists_Shipment.KeyValue1 WHERE fvDistinctKeyLists_Shipment.zSource = 'DE3'
7504	VTTP	DE3	8/21/2019 1:09:00 PM	CREATE PROCEDURE [dbo].[irDistinctKeyLists_VTTP_TKNUM_SalesDocument_Ins] AS BEGIN INSERT INTO ttDistinctKeyLists_VTTP_TKNUM_SalesDocument_InsSel (KeyType, KeyValue1, KeyValue2) SELECT zSource, MANDT, KeyType, KeyValue1, KeyValue2 FROM irDistinctKeyLists_VTTP_TKNUM_SalesDocument_InsSel END
7503	VTTP	DE3	8/21/2019 1:09:00 PM	CREATE PROCEDURE [dbo].[irDistinctKeyLists_VTTP_TKNUM_DE3_Ins] AS BEGIN INSERT INTO ttDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel (KeyType, KeyValue1, KeyValue2) SELECT zSource, MANDT, KeyType, KeyValue1, KeyValue2 FROM irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel END
7502	VTTP	DE3	8/21/2019 1:09:00 PM	CREATE VIEW [dbo].[irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel] AS SELECT dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.zSource, dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.MANDT, dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyType, dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyValue1, dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyValue2 FROM ttDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010 ON ttDistinctKeyLists.KeyValue2 = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyValue2 AND ttDistinctKeyLists.KeyType = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyType AND ttDistinctKeyLists.KeyValue1 = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyValue1 AND ttDistinctKeyLists.KeyValue2 = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyValue2 AND ttDistinctKeyLists.KeyType = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyType AND ttDistinctKeyLists.KeyValue1 = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyValue1 AND ttDistinctKeyLists.KeyValue2 = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyValue2 WHERE (ttDistinctKeyLists.KeyValue1 = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.zSource) OR (ttDistinctKeyLists.KeyValue1 = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.MANDT) OR (ttDistinctKeyLists.KeyValue1 = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyType) OR (ttDistinctKeyLists.KeyValue1 = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyValue1) OR (ttDistinctKeyLists.KeyValue1 = dbo.irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010.KeyValue2)
7501	VTTP	DE3	8/21/2019 1:09:00 PM	CREATE VIEW [dbo].[irDistinctKeyLists_VTTP_TKNUM_SalesDocument_DE3_InsSel_010] AS SELECT DISTINCT 'DE' AS KeyType, TKNUM AS KeyValue1, " AS KeyValue2 FROM dbo.FILTER_VTTP_DE3

Parameters

Parameters page controls how many records goes into a XLSX file. Filter table bigger than the limit will be generated as CSV files. PreApproved or Approved reports can be turned off but unchecking the flag below. It will also deactivate the File Download on the Table Filter page if files are not generated.

The screenshot displays the 'Parameter' configuration page in the 'psaDataFilter' application. The left sidebar lists various configuration options, with 'Parameter' currently selected. The main content area features a table with the following data:

Parameter	Value	Pre Approved	Approved
FILE LIMIT XLS	400000	✓	✓