

## **Process Flow for Copying Subsets of Data**

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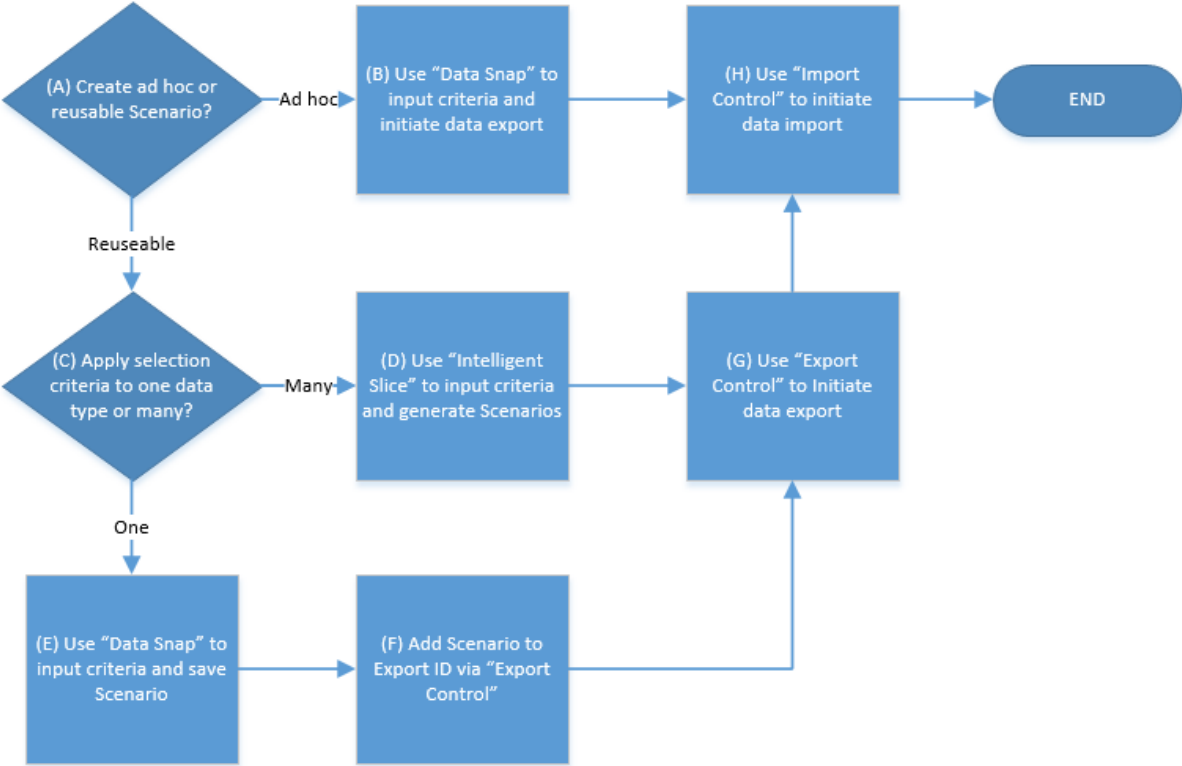
## ***Introduction***

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The purpose of this document is to help provide details regarding the various processes that can be used to copy subsets of data via Gold Client's Data Echo functionality. It consists of a relatively simple flow chart followed by additional details for each step on the subsequent pages. There is also a section that recommends additional Gold Client resources that are available.

The content in this document will have more value for new users of Gold Client versus those who are more experienced.

# Gold Client data copy process flow



## Additional content for the various process steps:

- (A) **Create ad hoc or reusable Scenario?** – A “Scenario” in Gold Client terminology is an object that contains the data criteria that is used to define what segment of data is to be copied. It is possible to create an ad hoc (1-time use) or a reusable Scenario. Saving a Scenario for reuse can be thought of in the same way as saving a variant within SAP.

In this step, the user must decide which type of Scenario best fits their particular requirement.

- (B) **Use “Data Snap” to input criteria and initiate data export** – The Data Snap function is ideal for ad hoc Scenarios, for example, production support purposes -- typically a data segment that you may copy one time. Data Snap does not save the criteria for reuse.

In this step, the user inputs the appropriate selection criteria and from this same screen initiates the data export.

- (C) **Apply selection criteria to one data type or many?** – For example, some organizations may need to copy a 1-month slice of data for a number of their primary data types (sales orders, purchase orders, etc.) and so they want to apply a common set of criteria, like a date range, across multiple data types. Other requirements may be narrower in scope and so only one or a few data types would be required.

In this step, the user must decide which type of Scenario best fits their particular requirement.

- (D) **Use “Intelligent Slice” to input criteria and generate Scenarios** – The Intelligent Slice function is ideally suited for copying a time slice of data that is typically applied to multiple data types.

In this step, the user first inputs the necessary selection criteria and then selects the Data Types to which the criteria are applied. The program then creates the Scenarios and assigns them to a new Export ID on behalf of the user.

- (E) **Use “Data Snap” to input criteria and save Scenario** – The Data Snap function is the most intuitive choice for creating Scenarios but is limited to just one Data Type per execution.

In this step, the user inputs the necessary criteria and uses the ‘Save As Scenario’ function to create the Scenario.

- (F) **Add Scenario to Export ID via “Export Control”** – The Export Control function is the dashboard for organizing Scenarios. An Export ID is like a binder that organizes together a set of Scenarios.

In this step, the user creates an association by adding their Scenario to a new or existing Export ID.

- (G) **Use “Export Control” to initiate data export** – The Export Control function is the dashboard for initiating and managing data exports.

In this step, the user selects one or more Scenarios and initiates the export process.

(H) **Use “Import Control” to initiate data import** – The Import Control function is the dashboard for manually initiating and managing data imports in the target client.

In this step, the user selects one or more of the completed data exports and initiates the import process.

Note regarding data imports:

Imports can be executed automatically by using a Remote Function Call (RFC). Basically, once the export completes in the source system, a call is made to the target system and the data import is programmatically initiated. The user must select which RFC to use, and this task must be completed prior to initiating the data export. This applies to exports that are initiated via Data Snap and Export Control.

## Recommended resources:

This resource provides relevant and detailed documentation on how to complete the various tasks within this process flow.

Gold Client Data Echo User Guide: [https://help.qlik.com/en-US/gold-client/Content/GoldClient/ERP/8.6/PDF/Gold%20Client%20\\_6%20Data%20Echo%20User%20Guide.pdf](https://help.qlik.com/en-US/gold-client/Content/GoldClient/ERP/8.6/PDF/Gold%20Client%20_6%20Data%20Echo%20User%20Guide.pdf)

This resource provides best practices content.

Gold Client Best Practices: [https://help.qlik.com/en-US/gold-client/Content/GoldClient/ERP/8.7/PDF/Gold%20Client%20Best%20Practices%20\\_7.pdf](https://help.qlik.com/en-US/gold-client/Content/GoldClient/ERP/8.7/PDF/Gold%20Client%20Best%20Practices%20_7.pdf)

## ***Support Information***

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Qlik Analytics (ISR) Ltd. can be contacted either by telephone or via email. Any support related issue regarding problems with or use of the Gold Client software and process can be reported for resolution.

If our offices are closed, or staff is unable to directly respond to a support request, we will respond within 24 hours of the initial call. Problems related to the export or import processing may require code enhancements. If a code enhancement or fix is required, resolution time may vary.

As per the maintenance agreement, any repairs or enhancements to the Gold Client software will immediately be deployed to all customers up-to-date with their maintenance contract. It is the choice of the customer as to if and when such enhancements are implemented. In addition, customers may request a planning session with Qlik to review changes in the software and how the changes might impact their environment.

We can also be contacted to discuss application or feasibility of using the Gold Client process to resolve a current challenge the project team faces. When this is required, a planning session can be scheduled in advance to ensure proper participation by both Qlik and the client.

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