
**Subset Sync
User Guide
8.7**

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Table of Contents

Introduction

RFC Destination

Subset Sync Configuration

Exports Using Subset Sync

Security

Support Information

Introduction

This document serves as the User Manual for using the Subset Sync functionality. Illustrated within this user guide are the instructions for understanding the Subset Sync interface. In previous versions of Gold Client, this functionality was known as 'Connector'.

Gold Client gives you the ability to export data from an ERP system and automatically trigger the data export from connected systems such as CRM and SRM. The export can also be initiated from a connected system such as CRM and SRM, and automatically trigger the data export in the ERP system (in other words, the export connection is operational in either direction). This functionality must leverage RFC destinations.

RFC Destination

The Subset Sync functionality uses an RFC Destination to submit the export on the connecting system. An existing RFC Destination can be used or a new one can be created specifically for Gold Client Subset Sync jobs. This is an example of an RFC Destination from transaction SM59 (Fig 1.0).

Figure 1.0

The screenshot displays the configuration for an RFC Destination. At the top, the RFC Destination is set to 'HCD' and the Connection Type is '3 ABAP Connection'. The Description field contains 'CRM IDES SYSTEM'. Below this, there are three empty fields for Description 2 and Description 3. The interface includes several tabs: Administration, Technical Settings, Logon & Security, MDMP & Unicode, and Special Options. The 'Logon & Security' tab is active, showing 'Security Options' with 'Trusted System/Logon Screen Status' set to 'No' and 'Logon Screen' unchecked. The 'Status of Secure Protocol' is set to 'Inactive'. The 'Logon' section shows 'Language' as 'EN', 'Client' as '800', 'User' as 'RFC_USER' (with 'Current User' unchecked), and 'PW Status' as 'saved'.

The User settings should be setup as a communication user on the connecting system. If the Current User option is used instead, exports in the background will fail. Submitting exports in the foreground (which can only be done via Export Control) would require the user to log in to the connecting system.

The User ID will require access to execute Gold Client functions on the connecting system.

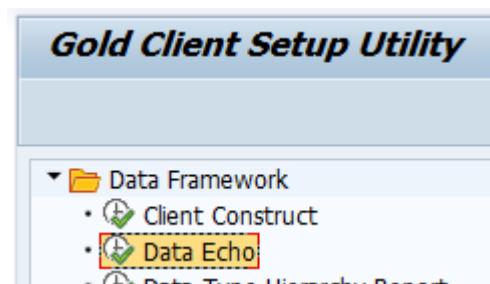
Subset Sync Configuration

Prior to utilizing the Subset Sync functionality, some Gold Client configuration setup may be required. It may also be necessary to maintain the configuration details from time to time.

To create or maintain the configuration that the Subset Sync functionality requires, take the following steps:

1. Go to the main Gold Client screen via transaction code ZGOLD
2. Select the 'Configuration' button located in the lower right-hand corner; the Gold Client Setup Utility screen should appear
3. Under the Data Framework folder select the executable named Data Echo (Fig. 1.1); the Gold Client Data Framework screen should appear

Figure 1.1



4. Open the Data Type in which the Subset Sync needs to be configured and select the 'Subset Sync' maintenance view; in this example SD - CUSTOMER MASTER is used (Fig 1.2). The configuration details will then appear in the sub-screen on the right-hand side (Fig. 1.3).

Figure 1.2

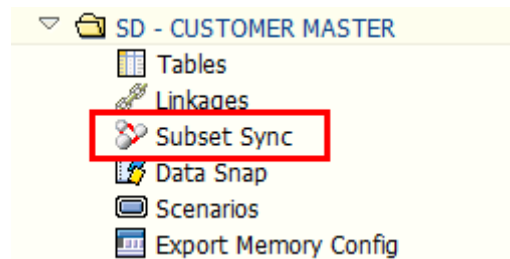


Figure 1.3

The screenshot shows the 'SD - CUSTOMER MASTER' configuration window. At the top, there is a table with columns: Datatype Kind, File ID, Primary, Primary Date Field, and Data Wave. The 'Master Data' row is highlighted, with values: SDCUST, checked, ERDAT, and unchecked. Below this is a toolbar with various icons. Underneath the toolbar is a section titled 'Subset Sync Linkages [Display Mode]' containing a table with the following data:

Active	Destination	Hdr Table	Field	Feld	Feld	Feld	Feld	Data Type	Field	Feld	Feld	Feld	Feld
<input type="checkbox"/>	CR7_800	KNA1	KUNNR					CA - BUSINESS PARTNERS	PARTNER				

- Convert the screen to change mode and add new entries or make changes to existing entries as needed; when complete, save your work and exit the Data Echo Framework

The following fields comprise the Subset Sync configuration:

Active – This checkbox can be selected when this Subset Sync config object should be set as the default. The value of checking a Subset Sync config object as 'active' is that when exporting data for the given data type, a Subset Sync export in the connected system will occur automatically. At the time of export, the user still has the flexibility to execute an export without using Subset Sync (for those times when an exception is necessary).

Note: this option became available in Gold Client release 8.2

Dest. (Destination) – The RFC destination that Gold Client will use to connect for exporting the related data. A dropdown list is available that will display all available RFC destinations from transaction SM59; this is a required field.

Hdr Tab (Header Table) – The header table of the datatype selected; this is a required field.

Field – Table field from the defined header table which contains the data object value that will be passed to the connecting system for export. The first field is required whereas the remaining four field entries are optional.

Data Type – The data type on the connecting system that will be used for the Subset Sync export. If the dropdown list is used, the RFC destination defined in the Dest. Field will be used to show all available data types on the connecting system; this is a required field.

Field – Table field from the header table of the Data Type on the connecting system. If the dropdown list is used, the RFC destination defined in the Dest. Field will be used to show all available fields on the connecting system based on the Data Type selected. The first field is required whereas the remaining four field entries are optional.

In this SD – CUSTOMER MASTER example (Fig. 1.4), the Active box is selected and so, any exports of this data type will automatically initiate the export in the connected system. "CR7_800" is the RFC destination used to connect to this CRM system; table "KNA1" is the header table for data type SD – CUSTOMER MASTER; "KUNNR" is a field from table KNA1 that will be used to pass data to the CRM system; "CA – BUSINESS PARTNERS" is the data type recipient in the CRM system; "PARTNER" is a field from the CA – BUSINESS PARTNERS data type from header table BUT000.

Based on this configuration an export initiated in the ERP system using data type SD – CUSTOMER MASTER will pass the Customer Number values captured from table KNA1 and field KUNNR to the CRM system defined in RFC destination CR7_800. An export will be generated on this CRM system using data type CA – BUSINESS PARTNERS matching the values of table KNA1 and field KUNNR with values of table BUT000 and field PARTNER.

Figure 1.4

SD - CUSTOMER MASTER												
Datatype Kind	File ID	Primary	Primary Date Field	Data Wave								
Master Data	SDCUST	<input checked="" type="checkbox"/>	ERDAT	<input type="checkbox"/>								

Subset Sync Linkages [Display Mode]												
Active	Destination	Hdr Table	Field	Feld	Feld	Feld	Feld	Data Type	Field	Feld	Feld	Feld
<input checked="" type="checkbox"/>	CR7_800	KNA1	KUNNR					CA - BUSINESS PARTNERS	PARTNER			

Exports Using Subset Sync

To utilize the Subset Sync feature during a Gold Client export, consider the following scenarios:

- If there is a need to **always** initiate a Subset Sync export for a given data type, the Subset Sync configuration should be set as 'Active' and then no further actions are required when exporting – the Subset Sync export will be programmatically initiated
- If there is a need to **typically** initiate a Subset Sync export for a given data type, the Subset Sync configuration should be set as 'Active' and then at the time of initiating the export, the Subset Sync button can be selected and the setting can be inactivated for the given export (however deselecting it here has no bearing on the actual Subset Sync config)
- If there is a need to **occasionally** initiate a Subset Sync export for a given data type, the Subset Sync configuration should be set as 'Active' and then at the time of initiating the export, the Subset Sync button can be selected and the setting can be activated for the given export (however selecting it here has no bearing on the actual Subset Sync config)

The Subset Sync feature is available from both the Export Control and Data Snap screens (Fig. 1.5 and 1.6).

Figure 1.5

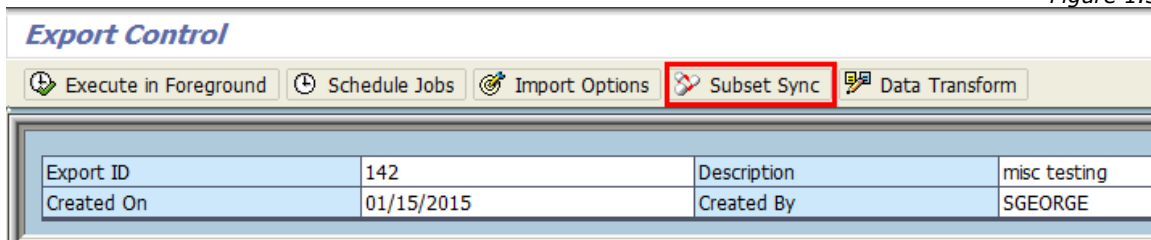
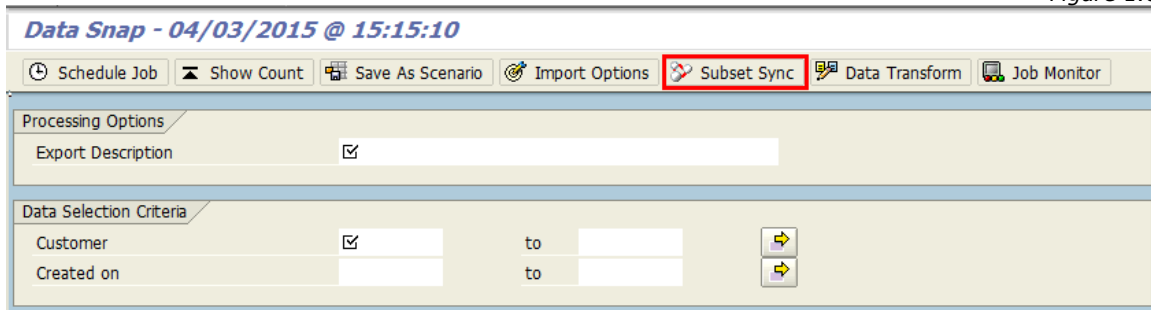


Figure 1.6



Subset Sync via Export Control

To initiate an export from the Export Control screen where Subset Sync functionality is relevant, do the following:

1. Go to the main Gold Client screen via transaction code ZGOLD
2. Select the 'Export Control' button
3. Click on an Export ID
4. Select the Subset Sync button located on the toolbar (Fig 1.7); variables here may generate different results:
 - a. A child window appears with those data types that have been configured to use Subset Sync which are relevant to the selected Export ID
 - i. Figure 1.71 shows this window where the 'Select' checkbox reflects the Subset Sync configuration as being 'active'
 - ii. Figure 1.72 shows this window where the 'Select' checkbox reflects the Subset Sync configuration as being 'inactive'
 - b. If the data types associated with the selected Export ID are not configured for Subset Sync, this message appears instead (Fig 1.73)
5. Select or deselect which Subset Sync exports need to be executed on the connected targets, and click 'Accept'
6. Proceed with the data export as usual by either executing it in foreground or scheduling it as a background job
 - a. If a Subset Sync export is initiated in foreground, a child window appears requiring the entry of a job name for the export that will be used in the "destination" system (Fig 1.74)
 - b. If a Subset Sync export is initiated in background, a child window appears requiring the entry of a job name for the export; optionally, a job name can also be entered which will be used in the "destination" system (Fig 1.75); however, if this field is left blank, the job name used in the "source" system is leveraged with the concatenation of "AU-SYNC_" at the front of the job name as a way of signifying that this export was executed via Subset Sync (Fig 1.76).

Figure 1.7

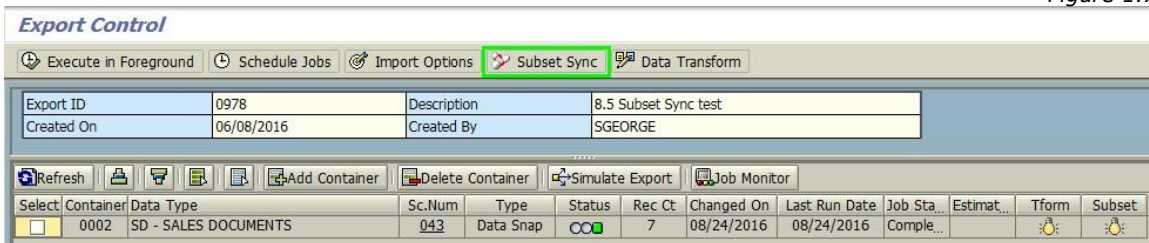


Figure 1.71



Figure 1.72



Figure 1.73

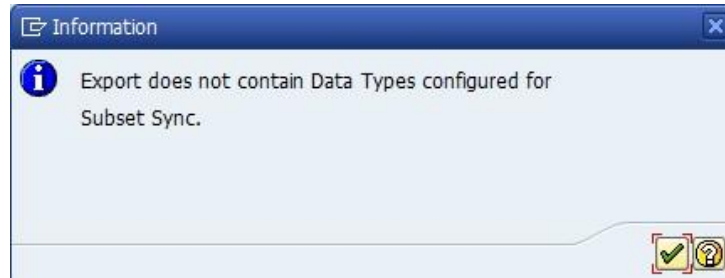


Figure 1.74

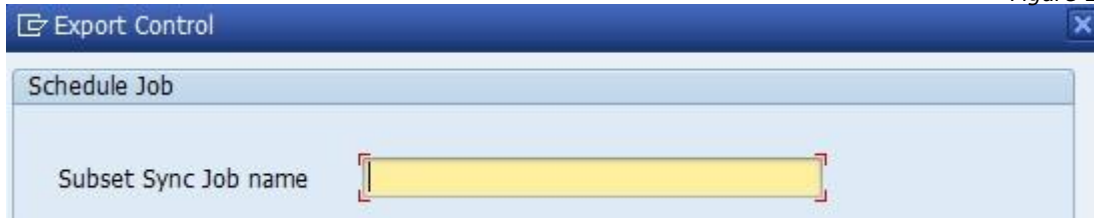


Figure 1.75

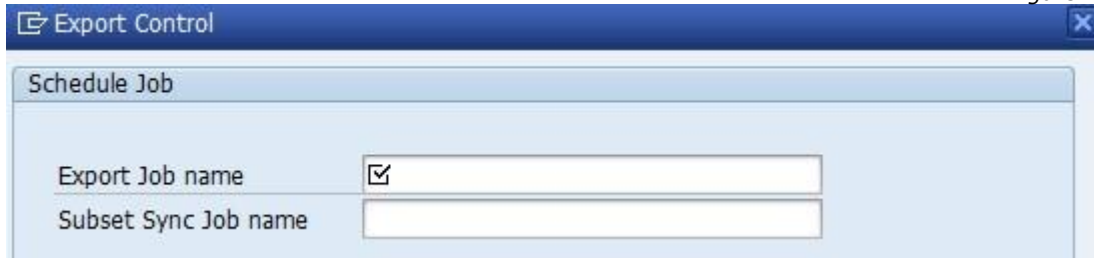


Figure 1.76

Job	Ln	Job CreatedB	Status
<input type="checkbox"/> ADV SYNC TEST #1		SGEORGE	Finished
<input type="checkbox"/> AU-SYNC_ADV SYNC TEST #1		SGEORGE	Finished
*Summary			

Since Gold Client release version 8.2, there is a new column in the Export Control dashboard named "Subset" which uses a light bulb indicator to show whether Subset Sync is active (Fig 1.77) or not for a given data type (Fig 1.78).

Figure 1.77

Select	Contain...	Data Type	Sc.Num	Type	Status	Rec Ct	Changed On	Date	Job Sta...	Estimat...	Tform	Subset
	0005	CA - BUSINESS PARTNERS	009	Data Snap		1	05/09/2013	05/22/2013		1		

Figure 1.78

Select	Contain...	Data Type	Sc.Num	Type	Status	Rec Ct	Changed On	Date	Job Sta...	Estimat...	Tform	Subset
	0001	EHS: BASIC DATA	000	Scenario S		0		00/00/0000	Complete			

Subset Sync via Data Snap

To initiate an export from the Data Snap screen where Subset Sync functionality is relevant, do the following:

1. Go to the main Gold Client screen via transaction code ZGOLD
2. Select the 'Data Snap' button
3. Select a Data Type and 'Execute'
4. Insert an Export Description and the selected data criteria
5. Select the Subset Sync button located on the toolbar (Fig 1.8); variables here may generate different results:
 - a. A child window appears if the chosen data type has been configured to use Subset Sync
 - i. Figure 1.71 shows this window where the 'Select' checkbox reflects the Subset Sync configuration as being 'active'
 - ii. Figure 1.72 shows this window where the 'Select' checkbox reflects the Subset Sync configuration as being 'inactive'
 - b. If the chosen data type is not configured for Subset Sync, this message appears instead (Fig 1.73)
6. Select or deselect which Subset Sync exports need to be executed on the connected targets, and click 'Accept'
7. Proceed with the data export as usual by scheduling it as a background job
 - a. A child window appears requiring the entry of a job name for the export; optionally, a job name can also be entered which will be used in the "destination" system (Fig 1.81); however, if this field is left blank, the job name used in the "source" system is leveraged with the concatenation of "AU-SYNC_" at the front of the job name as a way of signifying that this export was executed via Subset Sync (Fig 1.82).

Figure 1.8

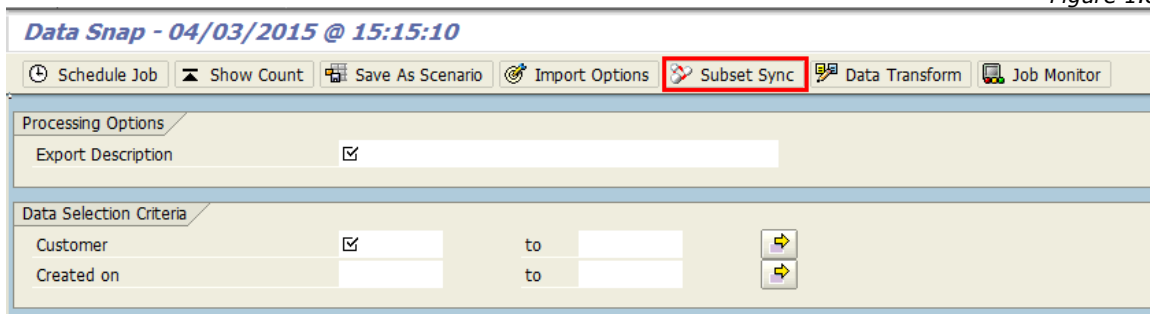


Figure 1.81

The screenshot shows a 'Schedule Job' dialog box. It contains two input fields: 'Export Job name' which has a checked checkbox, and 'Subset Sync Job name' which is an empty text box.

Figure 1.82

Job	Ln	Job CreatedB	Status
<input type="checkbox"/> ADV SYNC TEST #1		SGEORGE	Finished
<input type="checkbox"/> AU-SYNC_ADV SYNC TEST #1		SGEORGE	Finished
*Summary			

Subset Sync Exports

The following content contains some miscellaneous but useful details regarding Subset Sync exports.

If the export is submitted in the background, towards the end of the job log the Subset Sync job name and RFC destination will be displayed (Fig. 1.9).

Figure 1.9

```

*SUBSET SYNC JOB*      START      *SUBSET SYNC JOB*
Gold Client Subset Sync Job [AU-SYNC_ADV_SYNC_TEST_#2] submitted to RFCDEST [CR7_800]
... Source system      Datatype [CA - BUSINESS PARTNERS]
... will connect to Sync system Datatype [CA - BUSINESS PARTNERS]
TOP_GUID: 519A0E8972EC39F4E1000000CCF836C4
RUN_GUID: 519A0E8A72EC39F4E1000000CCF836C4
*SUBSET SYNC JOB*      END      *SUBSET SYNC JOB*
    
```

The Subset Sync job can be checked in the destination system; it will be executed using the same user ID that is defined within the RFC destination (Fig. 2.0).

Figure 2.0

Job	Spool	Job doc	Job CreatedB	Status	Start date	Start time
<input type="checkbox"/> AU-SYNC_ADV_SYNC_TEST_#2			TOLIVERO	Finished	22.05.2013	15:40:46
<input type="checkbox"/> AU-SYNC_ADV_SYNC_TEST_#2			TOLIVERO	Finished	22.05.2013	15:50:34
*Summary						

If a Subset Sync export cancels in the connected system, it's possible to restart it using Gold Client's **Resend Subset Sync Job** utility. To make use of this program, do the following:

1. Go to ZGOLD and then select the 'Configuration' button
2. From the Gold Client Setup Utility screen, open the Data Copy Toolbox folder and select the executable named Resend Subset Sync Job (Fig 2.1)
3. On the next screen input the following details
 - a. Top GUID
 - b. Run GUID
 - c. Ensure that the 'Resend' button is selected
 - d. **Note:** the Top GUID and Run GUID values can be found within the export job log (Fig 2.2); copy and paste from the log into their respective fields
4. Click the 'Execute' button to initiate the process
5. Check the results via t-code SM37 in the connected Source system

Figure 2.1

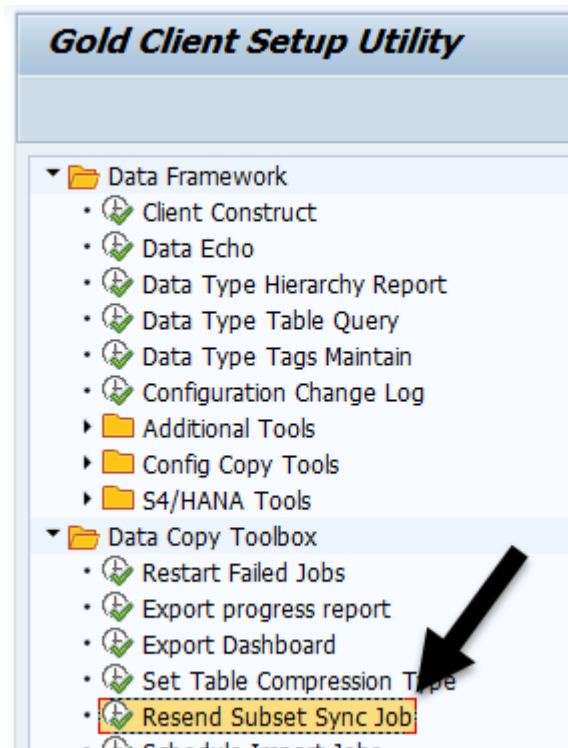


Figure 2.2

```

*SUBSET SYNC JOB*          START          *SUBSET SYNC JOB*
Gold Client Subset Sync Job [8.5 SUBSET SYNC TEST] submitted to RFCDEST [CR7CLNT800]
... Source system          Datatype [SD - SALES DOCUMENTS]
... will connect to Sync system Datatype [CRM - SALES HEADER]
TOP_GUID: 0017A4512C901EE69C8C876F0743CB00
RUN_GUID: 0017A4512C901EE69C8C876F0C248B00

```


Security

The security activities within Gold Client authorization object ZGCSGCSGCS specifically, relevant to using Subset Sync are as follows:

To select the Subset Sync feature (and thereby activate or inactivate during a data export):

Activity 15: Data Echo: Data Snap: Subset Sync

Activity 48: Data Echo: Export Control: Subset Sync

For maintaining the Subset Sync configuration:

Activity 85: Configuration: Framework: Data Echo: Change Access

Important: this activity provides access to change all config objects, not just those related to Subset Sync

Support Information

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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