Qlik Gold Client™

Qlik

How to Build a Target Client Using a Repeatable Process
8.7

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Introduction

This user guide provides the necessary steps for creating a new target client – or for refreshing an existing target client – so that the process can be easily repeated as often as required.

The document starts out by providing a bulleted list of tasks that need to be completed. The core part of this document describes each of these tasks in detail so that once complete should result in a client that contains SAP customizing, user master, and all master data from a source system such as Production. Another section outlines additional options that can be pursued when needed such as copying some degree of transactional data, and copying the user master from a system other than Production.

The content in this document is organized into logical sections and should be completed in the sequence in which they are listed. At the start of each section are Gold Client self-help resources that may be valuable for the user to complete the steps in each section. A strategy for completing the steps more quickly and any dependencies may also be documented when warranted. Additionally, for planning purposes, some steps will also list an estimated amount of time that is typically required to complete the task.

For most organizations, the bulk of the process outlined in this document will be performed by Basis team members as they are likely to be more familiar with the various tasks and have the proper authorizations.

If your organization feels the need to vary from the recommended processes documented here, freely contact the Qlik team to discuss alternative approaches and potential impacts.

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Summary of Tasks

This summary provides a bulleted list of tasks that need to be performed. Leverage the pages that follow for how-to details on completing each task.

1. In the Target System, create a new client using transaction SCC4 (5 minutes), or delete the selected client using transaction SCC5 (may take several hours depending on client database size). System value. When building a new client, be sure to assign a Logical System value.

2. From the selected Source Client, run Configuration and User Export using transaction SCC8 with export profile **SAP_UCSV**. (1 - 2 hours)

3. After successful Source Client configuration export, import the configuration into the Target Client via STMS. (1 - 3 hours)

4. After configuration import completion, run import post-processing in the Target Client using transaction SCC7 in background mode. (30 minutes – 1 hour)

5. Ensure that there is sufficient space available in the Target System. Consult with Qlik for recommendations on space.

6. Export the master data from the Source Client using the Gold Client "Client Exporter" function.

7. Import the Master Data into the Target Client using the Gold Client "Client Importer" function.

8. If Transactional Data is needed, export the appropriate subsets from the Source Client.

9. Import the Transactional Data subsets into the Target Client.

10. Manage number ranges in the Target Client by executing the 'Number Range Utility' to artificially increase the current numbers.

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Copying SAP Customizing and User Master

Since it is possible to use Gold Client to create a brand-new client or to refresh an existing client, this section has been divided into two different processes since the steps for each process have some uniqueness. Use only the process that aligns with your specific requirement. The process for creating a new client is listed first; the process for refreshing an existing client is listed second.

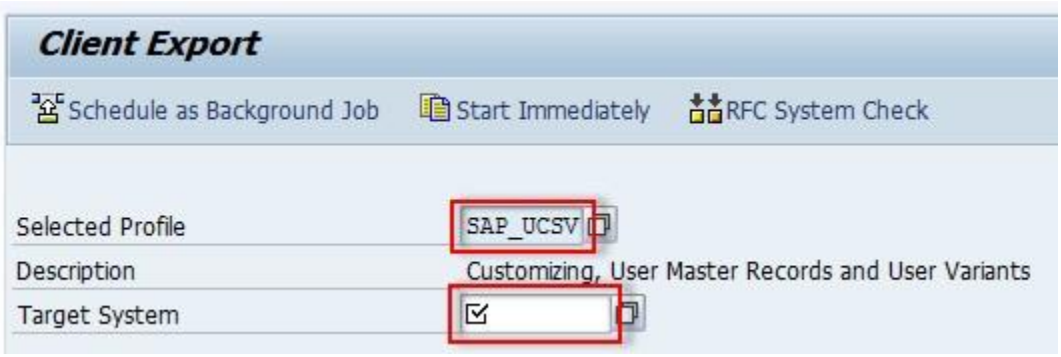
Copying SAP Customizing and User Master to a New Client

Gold Client Resources: *Client Construct 8.6 User Guide*
Time-saving Strategy: Steps 1 and 2 can be performed in parallel but since step 2 takes only a few minutes, any real time-savings is negligible
Dependencies: Step 3 is dependent upon the completion of both steps 1 and 2, and Step 4 is dependent upon the completion of step 3

1. From the selected Source system (typically Production), it is necessary to export the SAP Customizing and User Master export; this task can be completed using either standard SAP or Gold Client *(estimated time: 1 - 2 hours)*:

    a. Via t-code SCC8; be sure to select only profile **SAP_UCSV** and enter the appropriate Target System (Fig. 1.0)

Figure 1.0



    b. Via Gold Client's Client Exporter function; be sure to select the 'Transport Request' option in the Select Processing Method section, and the 'User Masters and Configuration' checkboxes within the Export Scope section; then select 'Execute in Foreground' (Fig. 1.1); after execution, an output is displayed showing the job name that was generated (Fig. 1.2).

    Note: It is not possible to release transports in background so foreground execution is required

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Figure 1.1

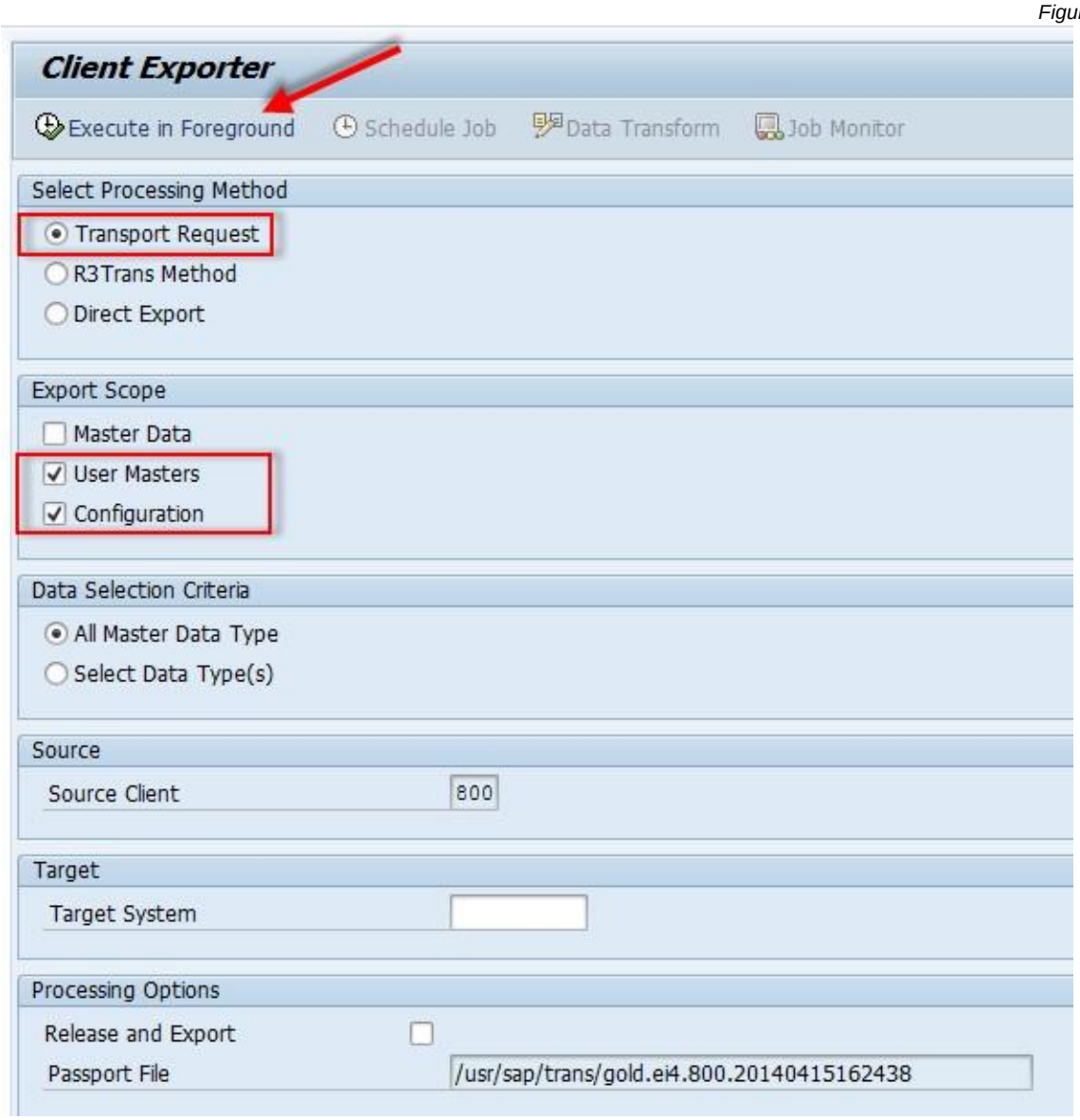
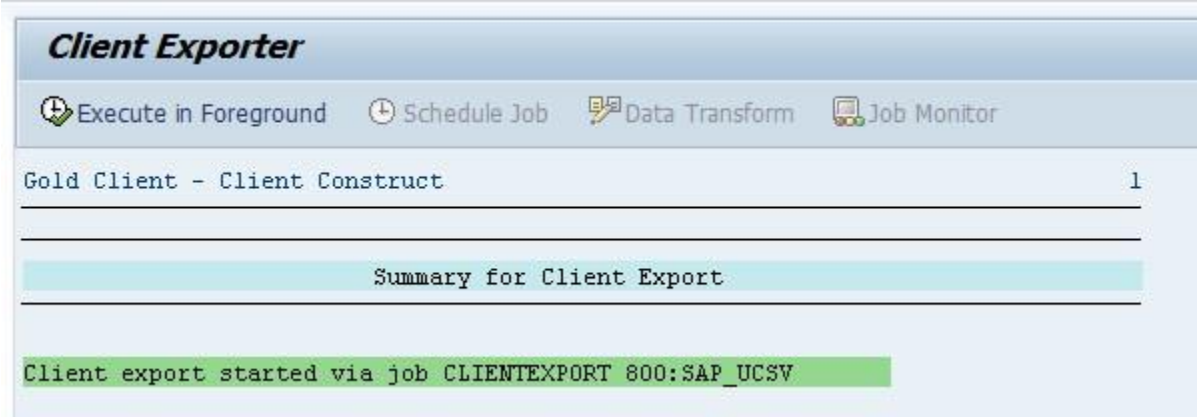


Figure 1.2



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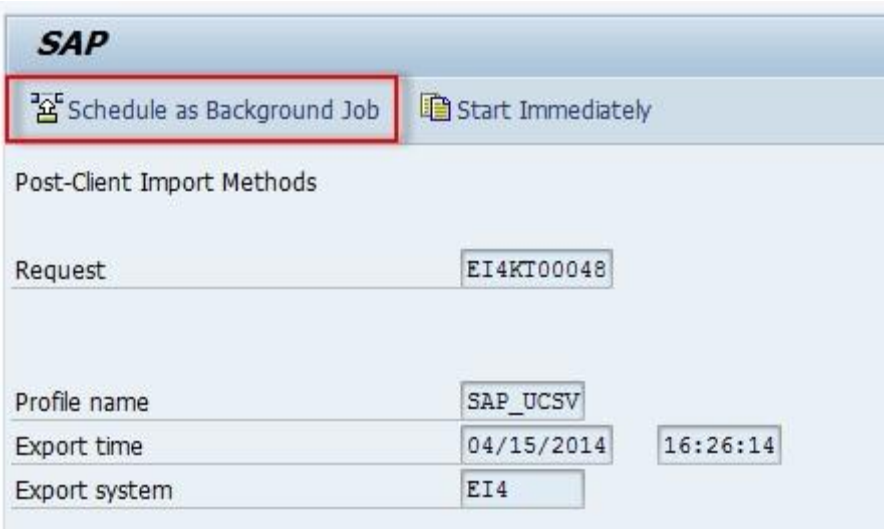
2. In the Target system, go to t-code SCC4 to define the new client; be sure to assign a Logical System as well *(estimated time: 5 minutes)*

3. Once the Customizing and User Master export job has completed successfully (step 1), and the Target client has been defined (step 2), add the transports that were generated from the export process into the Target system's queue via t-code STMS and then initialize the import into the new client. *(estimated time: 1 - 3 hours)*

4. Once the Customizing and User Master import has completed successfully (step 3), **it is critical** to execute the import post-processing program in the Target client via t-code SCC7; it is recommended that the program be executed as a background job (Fig. 1.3). *(estimated time: 30 minutes – 1 hour)*

Figure 1.3



If all steps have been completed successfully, move to the next process located in the section titled 'Exporting and Importing Master Data'.

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Copying SAP Customizing and User Master to an Existing Client

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Gold Client Resources: *Client Construct 8.6 User Guide*
Time-saving Strategy: Steps 1 and 2 can be performed in parallel since they will typically occur in different systems
Dependencies: Step 3 is dependent upon the completion of both steps 1 and 2, and Step 4 is dependent upon the completion of step 3

1. In the Target system, go to t-code SCC5 to initialize the client deletion process *(estimated time: may take several hours depending on client database size)*

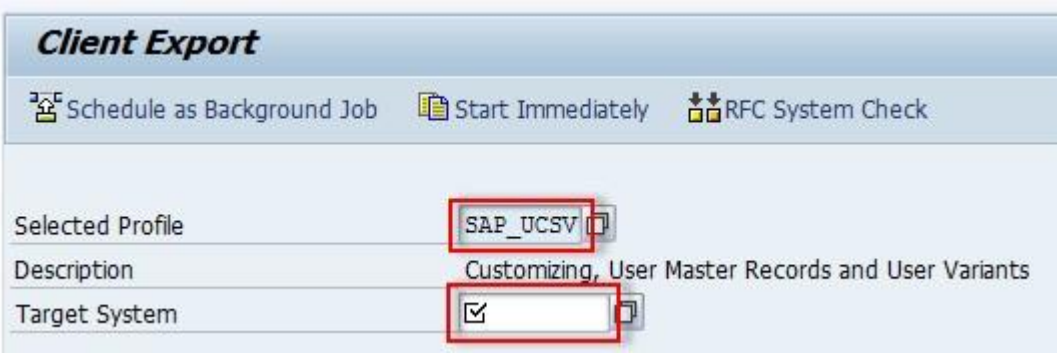
   Important note: It is possible to shorten the length of time it may take to delete the client; however, the actions listed below should ***only be performed*** if the Target client is the ***only client*** in the Target system since ***all clients*** in the system would be impacted by taking these actions. To save time, consider doing one or both of the following:

   (a) Truncate the 50-100 largest Application tables
   (b) Disable archive logging

2. From the selected Source system (typically Production), it is necessary to export the SAP Customizing and User Master export; this task can be completed using either standard SAP or Gold Client *(estimated time: 1 - 2 hours)*:

   a. Via t-code SCC8; be sure to select only profile **SAP_UCSV** (Fig. 2.0)

Figure 2.0



   b. Via Gold Client's Client Exporter function; be sure to select the Transport Request option in the 'Select Processing Method' section, and the User Masters and Configuration checkboxes within the 'Export Scope' section; then select 'Execute in Foreground' (Fig. 2.1); after execution, an output is displayed showing the job name that was generated (Fig. 2.2)

   Note: It is not possible to release transports in background so foreground execution is required

Figure 2.1

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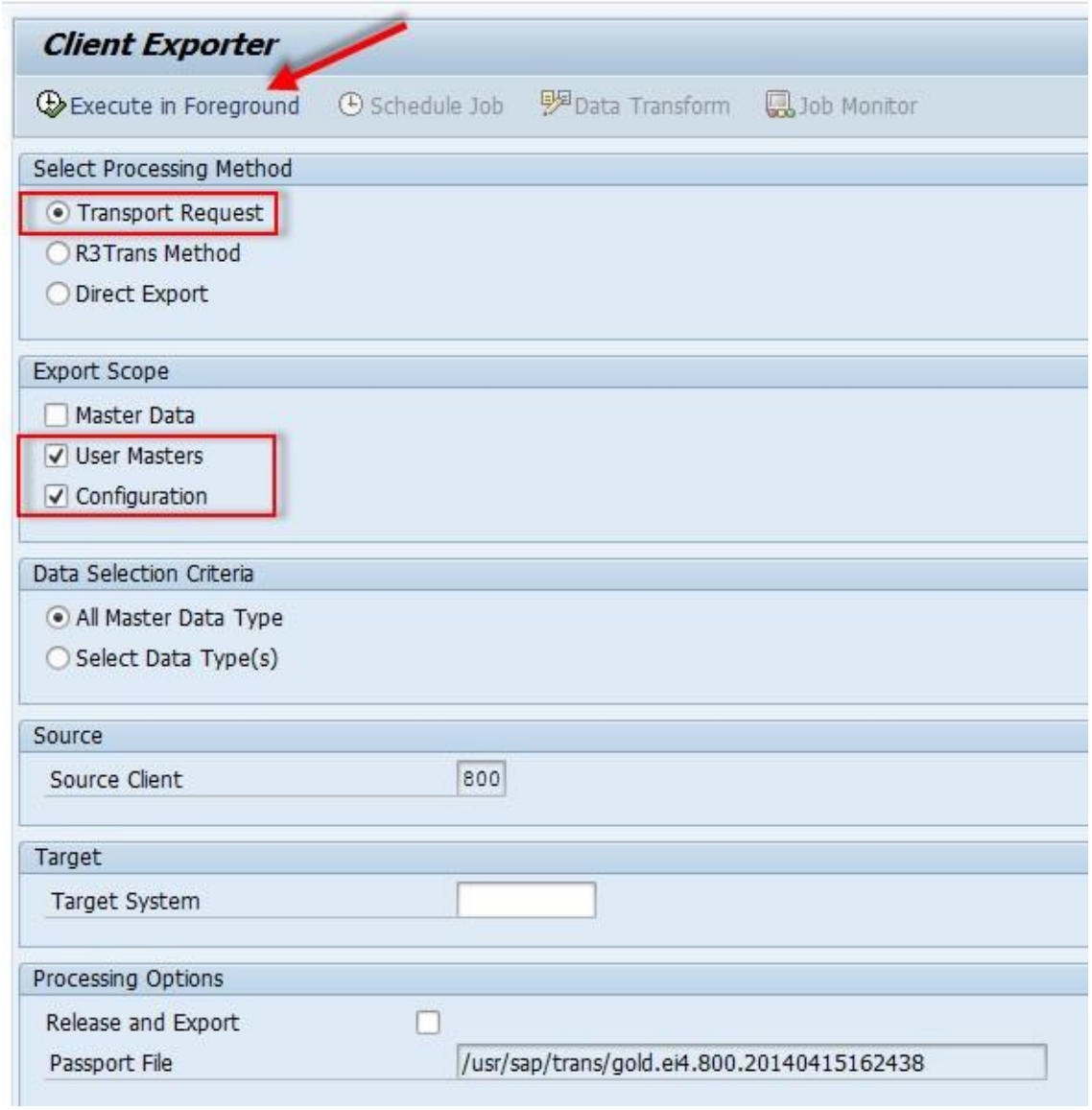
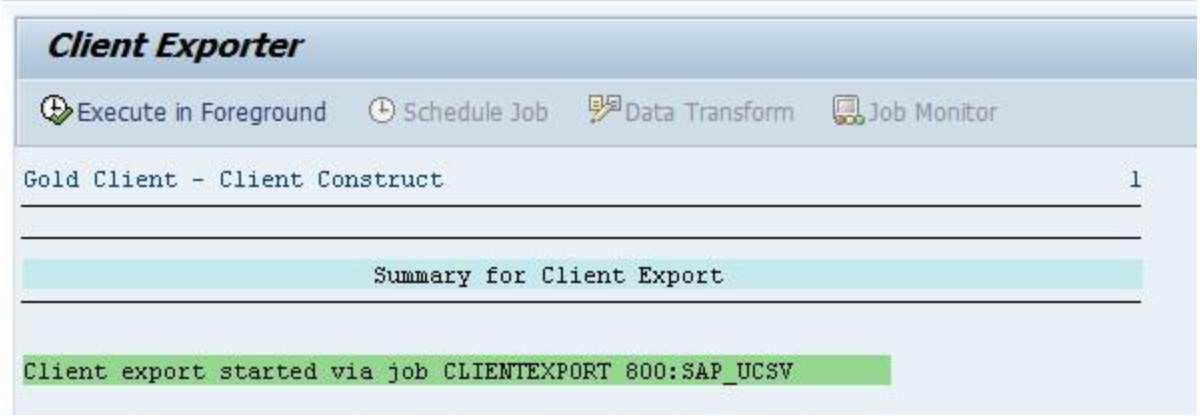


Figure 2.2



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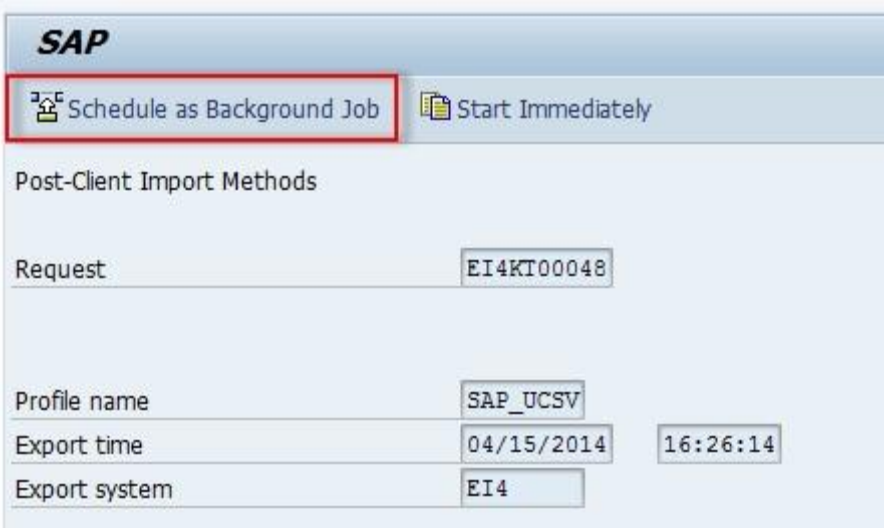
3. Once the Target client has been deleted (step 1), and the Customizing and User Master export job has completed successfully (step 2), add the transports that were generated from the export process into the Target system's queue via t-code STMS and then initialize the import into the new client. *(estimated time: 1 - 3 hours)*

4. Once the Customizing and User Master import has completed successfully (step 3), **it is critical** to execute the import post-processing program in the Target client via t-code SCC7; it is recommended that the program be executed as a background job (Fig. 2.3). *(estimated time: 30 minutes – 1 hour)*

Figure 2.3



If all steps have been completed successfully, move to the next process located in the section titled 'Exporting and Importing Master Data'.

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Exporting and Importing Master Data

Gold Client Resources: *Client Construct 8.6 User Guide*
Time-saving Strategy: none; the process is essentially linear
Dependencies: Step 3 is dependent upon both Step 1 and Step 2 within this process, as well as the Post-processing step (SCC7) from the preceding section

1. It is important to ensure that there is sufficient space available in the Target System to accommodate the mass load of master data. If space is lacking, the imports would likely fail at some point resulting in disruptions to the process and possibly creating some additional work to subsequently complete the data load. If necessary, consult with the Qlik team for recommendations on space.

2. Initialize the master data export from the Source system (typically Production) using the Gold Client 'Client Exporter' function. Per Qlik's best practice recommendation, select the **'Direct Export'** processing method since it is the most efficient (Fig. 3.0). It is also Qlik's best practice recommendation to copy all master data so be sure that the 'All Master Data Type' radio button is selected (the default setting). Initiate the export by selecting the 'Schedule Job' button (Fig. 3.0). In the child window that opens, enter a relevant job description, select the 'Parallel Processing' option, and then select 'Accept'. A message should appear showing the job name that was generated.

   Notes: Your organization could use a different processing method when needed. For more details regarding these options, reference the *Client Construct 8.6 User Guide*. The processing method used to export the data must be the same method used to import the data as the various processes are not interchangeable.

Figure 3.0

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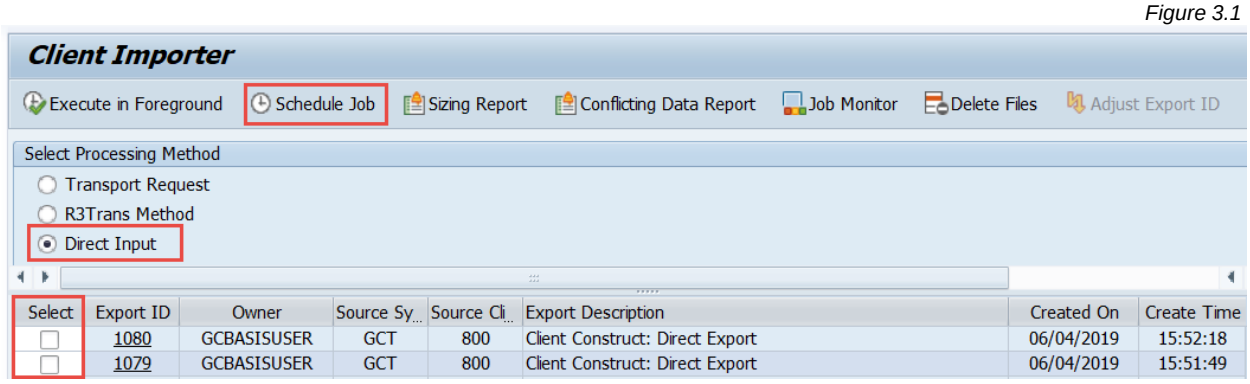
3. Once the master data export process is complete, log into the target client and initialize the master data import using the Gold Client 'Client Importer' function. Be sure to select the 'Direct Input' processing method; the screen will refresh accordingly. Tick the 'Select' checkbox for the relevant export and initiate the import by selecting the 'Schedule Job' button (Fig. 3.1). In the child window that opens, enter a relevant job description, select the 'Parallel Processing' option, and then select 'Accept'. A message should appear showing the job name that was generated.

   Important notes:

   - Prior to importing the master data in the Target client, **be sure that the Post-Processing activity** (t-code SCC7) **completed successfully**; if not completed successfully and data is imported, it's possible that the client would have to be deleted and rebuilt

   - Consider turning off or otherwise monitoring archive logs to ensure that they do not fill up; if the space reserved for archive logs fills up then the import process may fail at some point resulting in disruptions to the process and possibly creating some additional work to subsequently complete the process

Figure 3.1



Once the above steps have been completed successfully, move to the next process located in the section titled 'Managing Number Ranges'.

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Managing Number Ranges

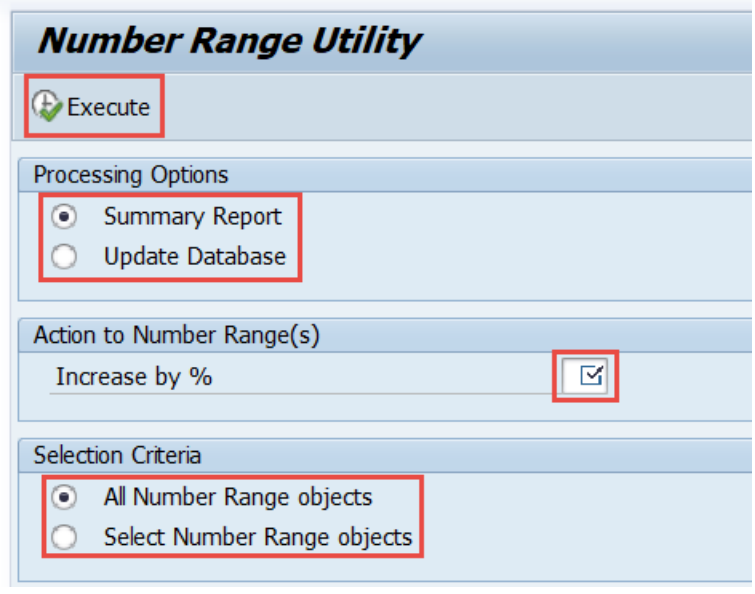
Gold Client Resources: *Number Range Utility 8.6 User Guide*

This step may seem minor but not executing it can have some **important and negative consequences** for your organization's Application Team. The sole purpose of executing the Number Range utility is to provide a buffer between the data that may be copied from the Source client into the Target client and the natively generated data created in the Target client. Without this buffer, it's very possible that conflicts will occur, and short dumps could be generated because the system tries to unknowingly create duplicate records in the database.

1. In the Target client, execute the Number Range utility (Fig. 4.0); refer to the user guide for any additional details that are needed to execute the program

   Note: Basis team members may not have the clarity to know what percent to increase the number ranges and so dialogue may need to occur with the Application teams to ensure that everyone is in agreement; however, the Qlik team's best practice recommendation is an increase that falls within the range of 5-20% since increasing the buffer too high may cause unforeseen issues.

Figure 4.0



Once this step has been performed, the process for creating a "baseline" client is complete.

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Optional Processes

Now that the new Target client has been successfully created with SAP Customizing, User Master, and all master data, and the Number Range utility has been executed, it's possible that some additional processing is required, and relevant details are documented here.

Copying Transactional Data

Gold Client Resources: *Data Echo 8.6 User Guide*, *Gold Client Customer Use Cases*

If the Target client requires that some transactional data be copied, this process can be completed now that the baseline client has been built.

Application Team members (Functional Analysts, ABAP Developers) will normally have some idea as to what transactional data needs to be copied and so it is at this point when they typically engage in the client-build process. Even if these team members do not have authorization to perform the actual data exports and imports, they should ideally be allowed to create the scenarios that define what data will be copied. Basis team members may then need to execute the exports and imports.

The *Gold Client Customer Use Cases* document provides insight into various uses of Gold Client but since the most typical process when creating a new client is to copy a time slice of data, this process is outlined below. The Intelligent Slice function is the most suitable function for creating the necessary Scenarios, Export Control is used to initiate the exports, and then Import Control is used to initiate the imports (unless the auto-import trigger is used at the time of export).

1. In the Source system, go to ZGOLD > Intelligent Slice

2. Input the relevant date range and any additional criteria as needed; execute (Fig. 5.0)

3. In the next window, select which data types need to have Scenarios created so that the data can be copied (Fig. 5.1)
    a. Be mindful that the focus should be on transactional data types since all master data has already been copied to the Target client; you can select master data types but understand that you may be copying data redundantly in that case

4. The system will respond with a message indicating which Export ID was created (Fig. 5.2)

5. Go to ZGOLD > Export Control to locate the Export ID and to initialize the export processes for the Scenarios that were generated by Intelligent Slice (Fig. 5.3)

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6. Once the imports are complete, log into the Target client and go to ZGOLD > Import Control to locate the Export ID and initiate import processing

Figure 5.0

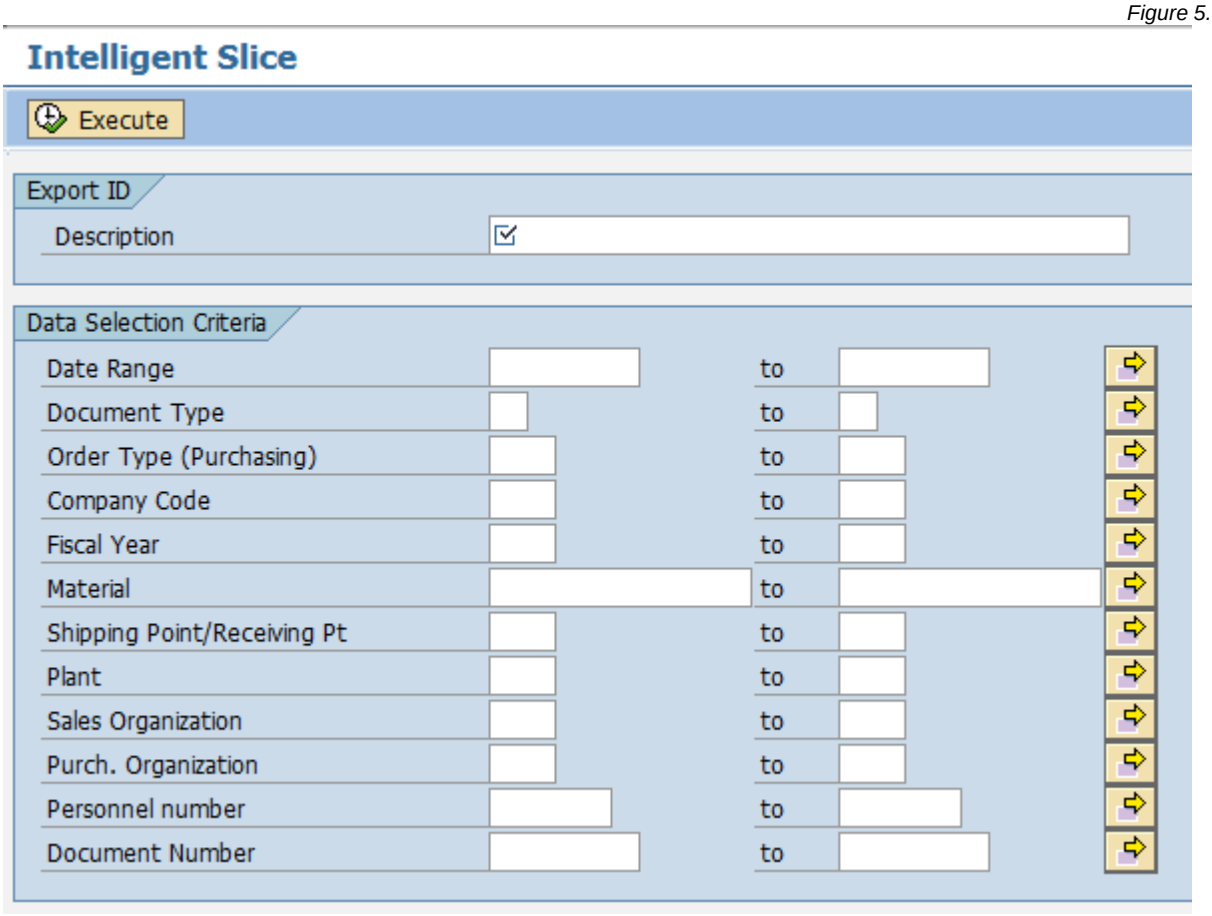

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Figure 5.1

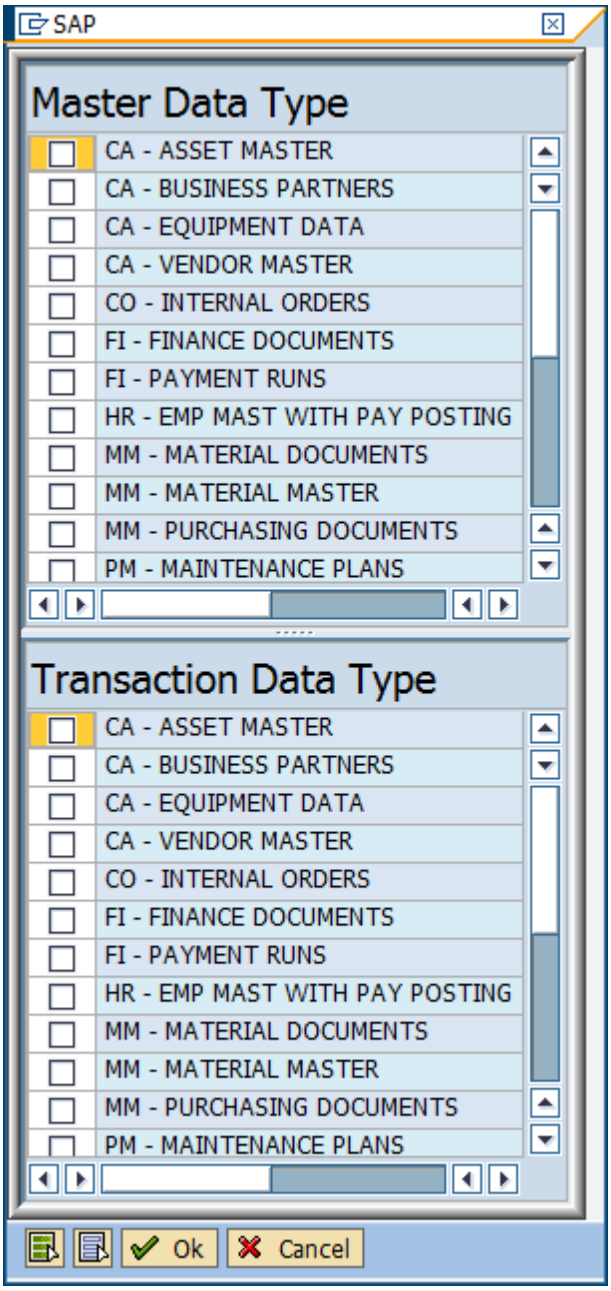

Figure 5.2

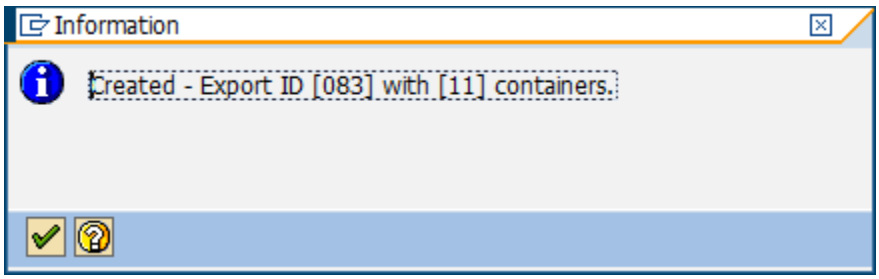

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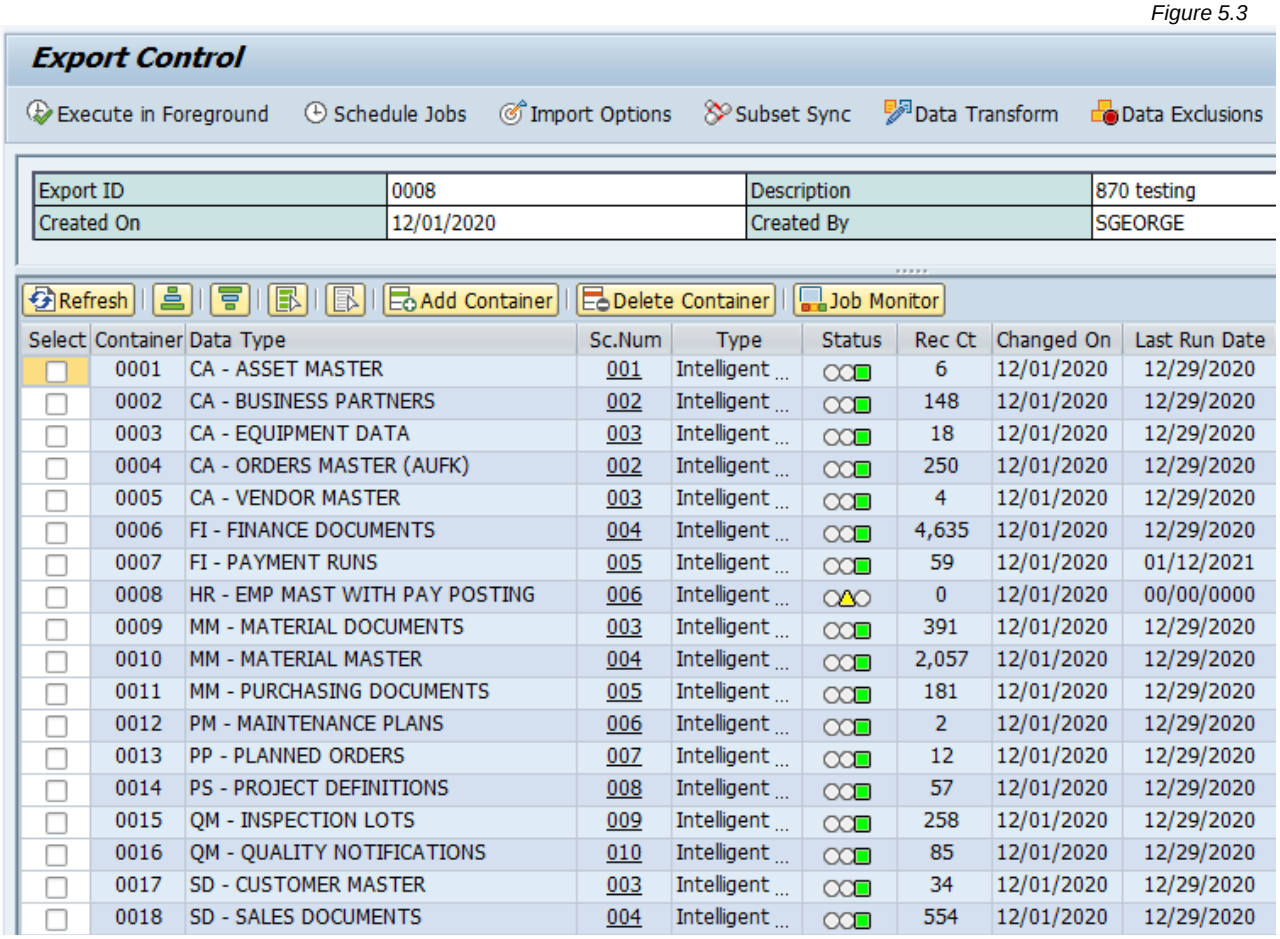
Figure 5.3



Export Control

Execute in Foreground | Schedule Jobs | Import Options | Subset Sync | Data Transform | Data Exclusions

Export ID	0008	Description	870 testing
Created On	12/01/2020	Created By	SGEORGE

Refresh | Add Container | Delete Container | Job Monitor

Select	Container	Data Type	Sc.Num	Type	Status	Rec Ct	Changed On	Last Run Date
☐	0001	CA - ASSET MASTER	001	Intelligent ...		6	12/01/2020	12/29/2020
☐	0002	CA - BUSINESS PARTNERS	002	Intelligent ...		148	12/01/2020	12/29/2020
☐	0003	CA - EQUIPMENT DATA	003	Intelligent ...		18	12/01/2020	12/29/2020
☐	0004	CA - ORDERS MASTER (AUFK)	002	Intelligent ...		250	12/01/2020	12/29/2020
☐	0005	CA - VENDOR MASTER	003	Intelligent ...		4	12/01/2020	12/29/2020
☐	0006	FI - FINANCE DOCUMENTS	004	Intelligent ...		4,635	12/01/2020	12/29/2020
☐	0007	FI - PAYMENT RUNS	005	Intelligent ...		59	12/01/2020	01/12/2021
☐	0008	HR - EMP MAST WITH PAY POSTING	006	Intelligent ...		0	12/01/2020	00/00/0000
☐	0009	MM - MATERIAL DOCUMENTS	003	Intelligent ...		391	12/01/2020	12/29/2020
☐	0010	MM - MATERIAL MASTER	004	Intelligent ...		2,057	12/01/2020	12/29/2020
☐	0011	MM - PURCHASING DOCUMENTS	005	Intelligent ...		181	12/01/2020	12/29/2020
☐	0012	PM - MAINTENANCE PLANS	006	Intelligent ...		2	12/01/2020	12/29/2020
☐	0013	PP - PLANNED ORDERS	007	Intelligent ...		12	12/01/2020	12/29/2020
☐	0014	PS - PROJECT DEFINITIONS	008	Intelligent ...		57	12/01/2020	12/29/2020
☐	0015	QM - INSPECTION LOTS	009	Intelligent ...		258	12/01/2020	12/29/2020
☐	0016	QM - QUALITY NOTIFICATIONS	010	Intelligent ...		85	12/01/2020	12/29/2020
☐	0017	SD - CUSTOMER MASTER	003	Intelligent ...		34	12/01/2020	12/29/2020
☐	0018	SD - SALES DOCUMENTS	004	Intelligent ...		554	12/01/2020	12/29/2020

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Copying the User Master from another Source

Gold Client Resources: *Client Construct 8.6 User Guide*

If the user master needs to be copied from a source that is different from where the SAP Customizing and data were copied from, the additional steps below can be performed

1. This task can be completed using either standard SAP or Gold Client

    a. Via t-code SCC8; be sure to select only profile **SAP_USER** and enter the appropriate Target System (Fig. 6.0).

Figure 6.0

    b. Via Gold Client's Client Exporter function; be sure to select the Transport Request option in the 'Select Processing Method' section, and the User Masters checkbox within the 'Export Scope' section; then select 'Execute in Foreground' (Fig. 6.1); after execution, an output is displayed showing the job name that was generated (Fig. 6.2).

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Figure 6.1

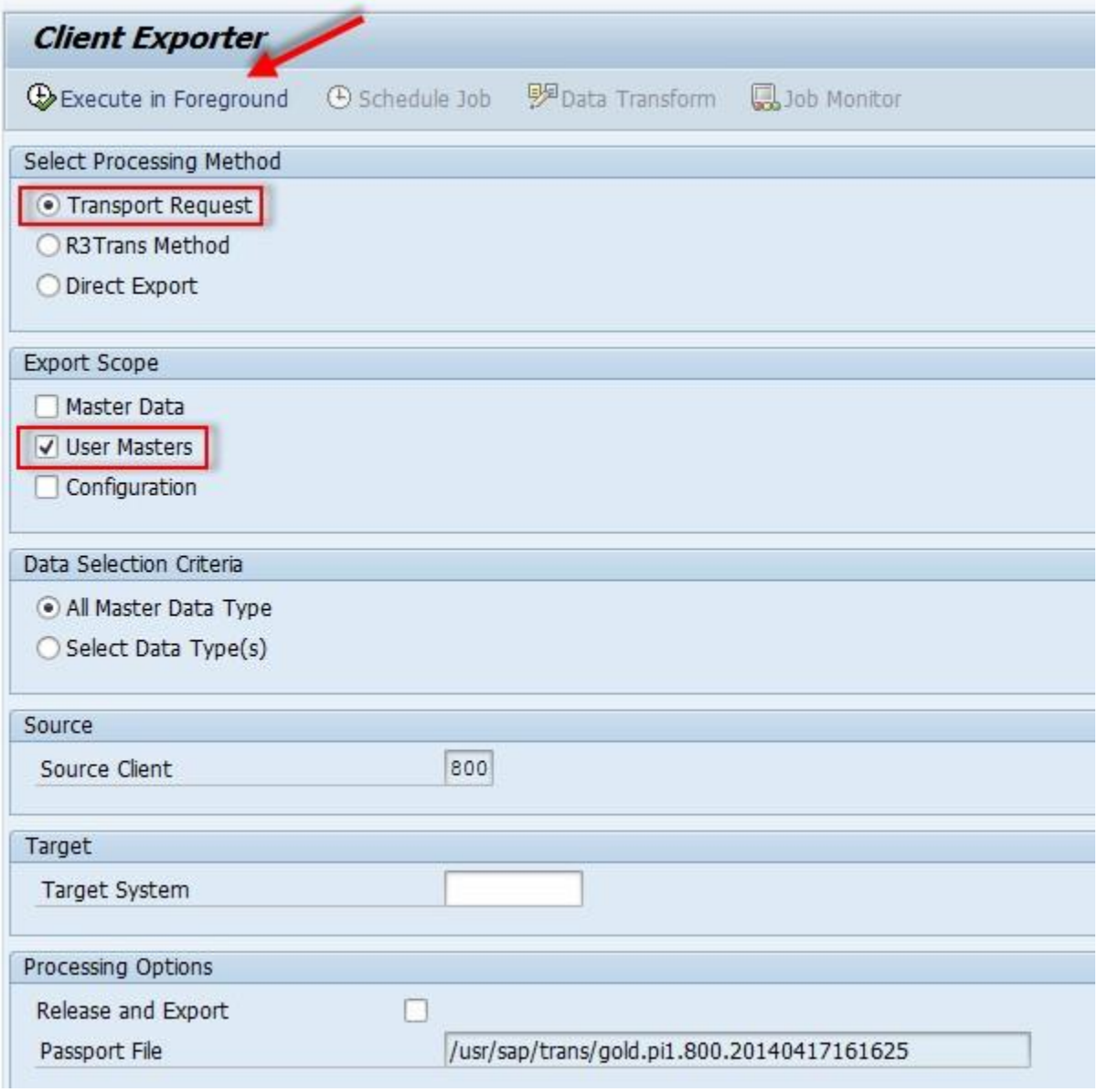
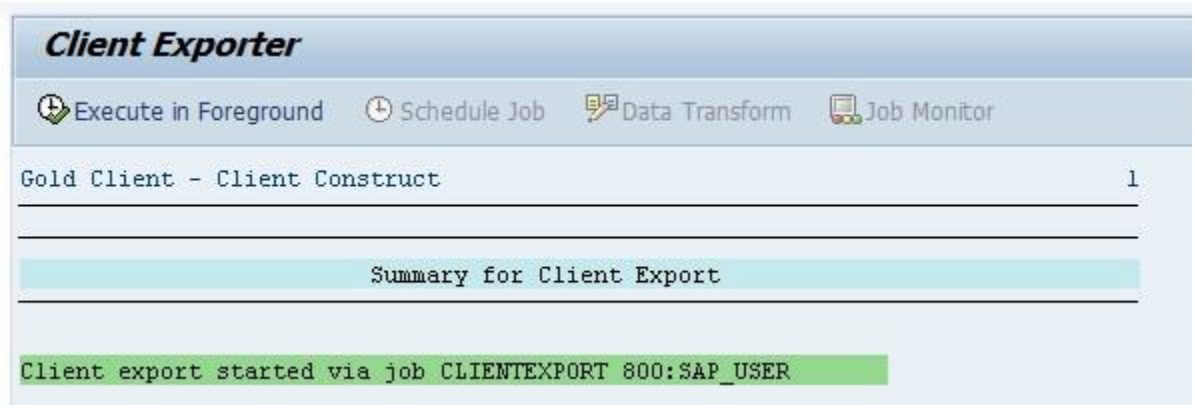


Figure 6.2



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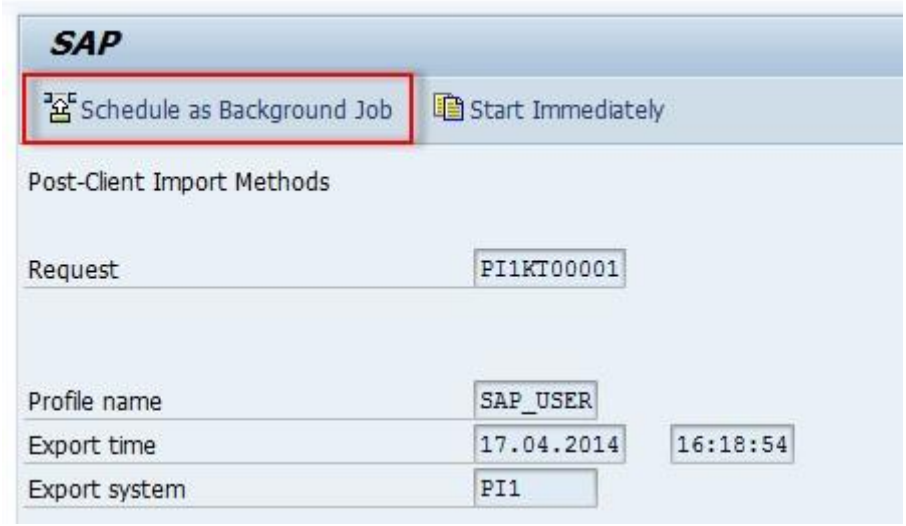
2. Once the User Master export job has completed successfully, the next step is to add the transport that was generated from the export process into the Target system's queue via t-code STMS and then initialize the import into the new client

3. Once the User Master import has completed successfully, execute the import post-processing program in the Target client via t-code SCC7; it is recommended that the program be executed as a background job (Fig. 6.3)

Figure 6.3



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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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Website:

https://www.qlik.com/us/products/qlik-gold-client

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