Gold Client
Customer Use Cases

Table of Contents

Introduction

Use Cases

- *New Development Client for Improved Unit Testing*
- *New Client for Production Support*
- *Refreshing Data in Training Clients*
- *New Client in Sandbox System*
- *Periodic Delta Refreshes*
- *"In Place" Data Transformation*
- *Business Divestitures*

Support Information

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Introduction

This document provides details about how Gold Client can be used to copy data across an SAP landscape and thereby alleviate various customer pain points.

Each use case documented here notes the problem that exists, how Gold Client can be used to resolve it, the benefits that should be received, and the resources to help achieve the objective.

Note: this document may not necessarily contain every possible Gold Client use case; its focus is on the more common uses.

Use Cases

New Development Client for Improved Unit Testing

Problem:

Application team members have low-quality data in DEV system which typically leads to either low-quality testing or no unit testing within the DEV system; changes are therefore promoted to QA system without adequate testing being done.

Solution:

Create a new unit test client* in DEV system utilizing Gold Client software and best practices. This new client is typically created by copying the SAP config and all master data from the Production system. Some amount of transactional data is normally copied from the Production system; a 1-month slice is typically a suitable amount for the new client, and then additional slices can be copied in the future as needed.

Client Construct functions 'Client Exporter' and 'Client Importer' can be used to copy the SAP config and master data between the source and target clients. Data Echo function 'Intelligent Slice' is ideal for creating data scenarios based on a date range and across various SAP modules; Data Echo functions 'Export Control' and 'Import Control' can be used to initiate and manage the actual data copy process between the source and target clients.

Alternatively, an existing client can be deleted to achieve the same result -- starting with a clean client

Benefits:

Gold Client helps restore your landscape to its intended purposes so that Application team members can perform meaningful unit testing in DEV using real production data. This result will likely help improve the team's change management processes since unit testing in DEV should allow for the reduction of transports that are released.

Resources:

All teams: *Gold Client Best Practices*
Basis Team: *How to Build a Target Client Using a Repeatable Process*, *Client Construct User Guide*
Gold Client Admin: *Number Range Utility User Guide*
Application Team: *Data Echo User Guide*

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New Client for Production Support

Problem:

Application team members can't perform production support-related activities in Production. Often times this leaves the end-user having to try and manually recreate the issue in a non-production system which takes time and depending on the issue's complexity may be highly difficult to replicate.

Solution:

Create a new client in DEV or QA system* utilizing Gold Client software and best practices. This new client is typically created by copying the SAP config and all master data from the Production system. For production support purposes, copying transactional data sets as part of the initial setup is not typically required, but if the client will serve a dual purpose such as testing, segments of transactional data could be copied to the new client.

Client Construct functions 'Client Exporter' and 'Client Importer' can be used to copy the SAP config and master data between the source and target clients. Data Echo function 'Data Snap' can be used to quickly and easily export data sets on an ad hoc basis and is perfectly suited for production support situations; function 'Import Control' can be used to initiate and manage the data import process into the target client.

If the client will serve other purposes and a slice of transactional data is needed, Data Echo function 'Intelligent Slice' is ideal for creating data scenarios based on a date range and across various SAP modules; Data Echo functions 'Export Control' and 'Import Control' can be used to initiate and manage the actual data copy process between the source and target clients.

Alternatively, an existing client can be deleted to achieve the same result -- starting with a clean client

Benefits:

A new client with config and master data from production creates the ideal baseline with which to copy production support-related transactional data; this should save your Application team members both time and effort, thus allowing them to streamline the resolution process. A faster resolution typically means that the business user is back up and running more quickly, too.

Resources:

All teams: *Gold Client Best Practices*
Basis Team: *How to Build a Target Client Using a Repeatable Process*, *Client Construct User Guide*
Gold Client Admin: *Number Range Utility User Guide*

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Refreshing Data in Training Clients

Problem:

On-going training activities may mean that training clients are constantly having to be refreshed from Production (or a copy of Production) which consumes both resources and database space. In other cases, training teams may have to constantly create new data manually which may take a long time to complete.

Solution:

Create a new training-specific client* in the appropriate system (usually TRN or QA) utilizing Gold Client software and best practices. This new client is typically created by copying the SAP config and all master data from the Production system. Since training activities are more concerned with data quality and not data quantity, copying only specific transactional data segments is typically required. If the data set requires reuse, the data can be deleted and reimported as many times as necessary. Gold Client can be used to copy additional data segments as training requirements are made known.

Client Construct functions 'Client Exporter' and 'Client Importer' can be used to copy the SAP config and master data between the source and target clients which creates a baseline client. Data Echo function 'Data Snap' can then be used to quickly and easily export transactional data subsets on an ad hoc basis and is thus suitable for copying training data segments. Data Echo function 'Import Control' can be used to initiate and manage the data import process into the training client(s); the Data Discard function 'Data Delete' can be used to remove data that has been used during training; then, the initial data set can be imported again for subsequent training activities.

A variation of this process, which may be more suitable for those organizations who are constantly training, is to use Gold Client to build a "master" training client with the relevant data and then use transaction SCCL (local client copy) to copy the entire client to "active" training clients. After the training course is completed, the "active" training clients can be easily refreshed from the "master" client using transaction SCCL to reset the client.

Alternatively, an existing client can be deleted to achieve the same result -- starting with a clean client

Benefits:

A small client is created so that less space is consumed, and yet it still contains the necessary data for training to be deployed successfully. Gold Client provides flexibility so that the data can be easily and frequently refreshed when needed. Additionally, this should reduce - and perhaps even eliminate - the need to manually create training data.

Resources:

All teams: *Gold Client Best Practices*
Basis Team: *How to Build a Target Client Using a Repeatable Process*, *Client Construct User Guide*
Gold Client Admin: *Number Range Utility User Guide*
Application Team: *Data Echo User Guide*

New Client in Sandbox System

Problem:

Sandbox clients are often times not part of the typical SAP transport path and thus the system falls out of sync with the rest of the landscape. Quality of data is likely to have become stale over time as well.

Solution:

This process would be similar to the use case of creating a new DEV client utilizing Gold Client software and best practices with a couple of potential differences:

(1) Since Sandbox systems can be out of sync with the rest of the landscape it may be necessary to first resolve any repository deltas for the client to be of production-like quality
(2) Transactional data may or may not be needed, but if it is, the amounts are typically small and could be copied in a surgical manner

Repository Replicator function 'Object Alignment' can be used to execute client comparisons between the source and target systems to identify and resolve any repository related deltas. Client Construct functions 'Client Exporter' and 'Client Importer' can be used to copy the SAP config and master data between the source and target clients. Data Echo function 'Data Snap' can be used to quickly and easily export surgical data sets. Data Echo function 'Import Control' can be used to initiate and manage the data import process into the sandbox client(s).

Benefits:

Gold Client helps align the repository objects in your sandbox system so that any clients that are created will be of the highest quality. In addition, a small client is typically created so that less space is consumed and yet it still contains the necessary data for prototyping, upgrading, or whatever activities are occurring in the Sandbox system. Consuming less space here also allows for quick deletion of the client when it is no longer needed.

Resources:

All teams: _Gold Client Best Practices_
Basis Team: _How to Build a Target Client Using a Repeatable Process_, _Repository Replicator User Guide_, _Client Construct User Guide_
Gold Client Admin: _Number Range Utility User Guide_
Application Team: _Data Echo User Guide_

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Periodic Delta Refreshes

Problem:

Certain master data objects (e.g. customers, vendors, and materials) in the production system change frequently and it's important for on-going testing purposes that these data objects be refreshed in the target client on a periodic and easily repeatable basis.

Solution:

The 'Intelligent Slice' function is the ideal method for creating the Scenarios for each data object because a date range can be entered and applied to multiple objects. The 'Export Control' function is then used to schedule the export job with a <u>future date/time</u>; doing this allows the user to leverage standard SAP (via t-code SM37) to schedule the export for the appropriate time and to set the periodic values accordingly.

Once the export is complete, the import process can be executed manually; however, the import can also be performed automatically. The 'Export Control' function has a feature named Import Options where an RFC can be entered; this RFC would be assigned to the system-client where the data is being imported. This setting would need to be defined <u>prior</u> to initializing the export.

After the export job has completed, the date range used within the initial Scenario criteria would need to be moved forward (e.g. from one week to the next, or one month to the next) prior to the next export execution. The 'Export Control' function has a feature named Adjust Date Range that can be used to change the date range associated to the various Scenarios. A variant can be created for this program and associated to a background job that is scheduled to run periodically.

In the manner outlined above, an initial export of data is performed, the import is then executed manually or automatically (via RFC); the date range is moved forward accordingly and the process can then repeat itself as often as needed per the periodic details that have been defined via SM37.

Benefits:

One or more clients that are consistently updated with refreshed master data. Once the various Gold Client objects have been defined and the background jobs scheduled, the copy process can be performed as often as required and with zero effort.

Resources:

All teams: *Gold Client Best Practices*

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"In Place" Data Transformation

Problem:

Some organizations may periodically perform full system copies from production to non-production systems but by taking this action, sensitive data may be at risk. Government regulations and/or an organization's internal auditing team may demand that certain data objects be transformed (scrambled) so as to protect sensitive data in non-production systems where system access tends to be much less strict than that of production.

Additionally, teams may choose to transform data objects so as to prevent the possibility of distributing outputs (emails, invoices, etc.) to the "real world" from a non-production system, particularly if other safeguards are not already in place.

Solution:

In those situations where sensitive data already exists in a non-production system, it is possible to use Gold Client to scramble this data "in place". To achieve the desired end-result, it's critical that Gold Client's Data Transform configuration details <u>exist in the non-production system</u> where data is to be transformed. These details can either be maintained directly in the client where data transformation must occur, or they can be copied to this client from another system-client such as Production.

The process used here is very similar to the copy process used when data is exported from production and imported into a non-production system; the one key difference here is that <u>all activities</u> – including the export and import - <u>occur within the same system-client</u>.

Scenarios must first be created for each of the sensitive data objects and this can be done by using Data Echo functions 'Data Snap', 'Intelligent Slice', and/or 'Scenario Segment'. The 'Export Control' function is used to assign the scenarios to an Export ID, and to initiate the data export processes. The 'Import Control' function is then used to import the data which will result in deleting the existing data records and inserting the transformed data records.

Benefits:

First and foremost, any potential risks of having sensitive data be visible to a broad array of team members has been mitigated. Accidental outputs may also be prevented with data transformation. The organization's SAP application team can now use real-world data without unintended consequences.

Resources:

All teams: _Gold Client Best Practices_
Application Team: _Data Echo User Guide_, _Data Transform User Guide_

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Business Divestitures

Problem:

A business entity is being divested; however only specific master and transactional data objects must be copied from the existing SAP system to the new divested system.

Solution:

The overall process to extract divested data from one system and add it to another has some similarities to the standard copy process; however, with divestiture-related activities, there are more steps involved, and additional preparatory tasks are required which are unique to this process. Due to the added complexity, and because each organization's requirements may be unique in scope and data volume, it is suggested that your team reach out to Qlik to leverage our team's hands-on expertise and we can partner with your organization to determine the optimal solution.

Benefits:

The ability to extract the data – *and only the data* – that the divested system requires. Additionally, Gold Client – coupled with our team's proven process – can help complete the divestment activities in a timely manner, which is particularly valuable when time is critical.

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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