



Global Master

HOW TO SYNCRONIZE MASTER DATA BETWEEN COMPANIES



itm8°

TABLE OF CONTENTS

INTRODUCTION	5
REQUIREMENTS	5
GLOBAL MASTER ROLE CENTER	6
Role Center Cue Tiles	7
Role Center Actions	9
Role Center setup	10
GENERAL SETUP	11
Global Master Setup	11
Setting up role center	14
Copying the entire subscriber company	14
Setting up field blacklist	15
Partner Setup	17
DATA TEMPLATE	20
Data Template Card fields	21
Data Template Card actions	24
Data Template List actions	26
Set up Data Templates for partner	31
Data Template Filter	32
UPDATE DATA	33
UPDATE STATUS	34
Subscriber Log	34
Subscriber Record Data	35
ERROR HANDLING	35
SUBSCRIBER PERMISSIONS	36

THE DATA TRANSFER PROCESS	37
Create and send Subscriber Log from master company	37
Update and Synchronize Record Data in subscriber company	38
Synchronize Subscriber status in master company	39
Examining the result of the data transfer process	40
Feature: Force Full Update	42
Feature: Check Field Value Update	43
Feature: Resend Data Template	43
Feature: Resend Subscriber Log	43
Feature: Update older log first	44
Feature: Update and synchronize Record Data (Current Log)	45
Feature: Show XML Document	45
Feature: Use Template Sequence No. to determine template processing rank	46
JOB QUEUE SETUP	47
Master	47
Subscriber	48
Jobs scheduled to run repeatedly with intervals	48
Job Queue Batch	49
COPY SUBSCRIBER COMPANY	51
CONFIGURATION TEMPLATE	52
MAINTENANCE	53
Cleanup Subscriber Log	53
Cleanup Subscriber Log Entries	54
Cleanup reports managed by Job Queue	54
PROFILES	55
Global Master Super User	56
PERMISSION SETS	58
RECOMMENDATIONS	59
Templates	59

APPENDIXES	60
Field Templates	60
Sub Templates	62

INTRODUCTION

Global Master (GM) is a tool used to synchronize data between companies. It is also possible to synchronize between companies in different databases.

GM provides synchronization based on relationship between partners. In GM, there are two types of partners - Master and Subscriber. It is possible to be both a Master and Subscriber at the same time. Master own templates and data, whereas Subscriber receive data from Master.

Data to synchronize is set up in Templates. Companies that would to subscribe to a template is set up as Subscribers on the Data Template (Reference to Partner setup).



Access Global Master through a dedicated role center or by use of the role explorer.

Remember to set the "Show in Role Explorer" in the profile Global Master Administrator to get the overview in the role explorer.

You are getting the best overview of available functions and tables using the role center or the role explorer.

M1 Master Find Explo	ore more roles		
← My Business Central Global Master Ac	Iministrator		
Home (11) - Data Templates - Partners - Subscriber Logs - Subscriber Log Entries - Subscriber Record Data - Job Queue Entries - Chart of Accounts - Customers - Vendors - Items Maintenance (2) - Cleanup Subscriber Log - Cleanup Subscriber Log - Cleanup Subscriber Log Entries	Setup (2) - Global Master Setup - Job Queue Batches	Master Company (2) - Create and send Subscriber Log - Synchronize Subscriber Status	Subscriber Company (1) - Update and Syncize Record Data

REQUIREMENTS

This product can be installed as an extension in Microsoft Dynamics Microsoft Dynamics 365 Business Central.

GLOBAL MASTER ROLE CENTER

The best overview of the available functions in GM is present in the role center. Here you will find easy access to the Global Master definitions and functions.

Dynamics 365 Busine	ss Central	Q	Q	Ø	? 🔥
	/1 Master Setup∨ Master Company∨ Subscriber Company∨ Maintenance∨ ≡		2		
	ata Templates Partners Subscriber Logs Subscriber Log Entries Subscriber Record Data Subscriber Record Data Job Queue Entries Chart of Accounts Customers	More V	2		
-	ilobal Master Activities				
	Templates Partners				
	4 1				
L '					
	ansactions Not Complete Not Complete Alerts Obsolete Logs Records				
	2 71 0 0				
	istory Subscriber Logs Record Data Subscriber Rec Subscriber Field Values				
	2 71 71 822				
-					
В	ack to top				

There are two types of companies managed by the role center: *Master company* and *Subscriber companies*. The role center is covering both areas since a company can be both of the two types simultaneously or only master or only subscriber.

Hint: The History group is displayed if selected in Global Master Setup only.

On the next pages the role center cue tiles are explained.

Role Center Cue Tiles

In the role center there are three groups. Management, Transactions and History. Every single cue tile represents a shortcut to a table containing data, but the number in the cue tile itself provides information on how many entries there are present in the underlaying table.

Management

The management group gives access to definitions of what data to synchronize whereto.

Management	
Templates	Partners
4	1
>	→ →

Templates are supplying the synchronization process with settings of what data to synchronize.

Partners defines the subscribers to receive data.

Template Subscribers are holding information on exactly what subscribers who are to receive data defined in a given template.

These cues are the easiest access to the information as described above.

Transactions

The transactions group is displaying data to be or being processed.

Transactions			
Not Complete Logs	Not Complete Records	Alerts	Obsolete
2	71	0	0
>	>	→	→

Here Subscriber Logs which are being processed, or which at least are waiting to have the final status marks updated, displayed along with Subscriber Record Data not synchronized yet.

To be accessed in subscriber companied only you find the Alerts. Here you find failing synchronization of Record Data that should be investigated. Obsolete Record Data are Record Data which are not controlled by the master company any more are displayed in the subscriber company role center.

Subscriber Logs are holding data to be synchronized for a specific data template. The data itself are stored in an xml document attached to the subscriber Log.

More the log has information on send-to-subscriber and updated-at-subscriber status.

Subscriber Record Data are data per record in a table handled by a data template to be send to a subscriber. Also, here status on the transactions are displayed.

Subscriber company

Alerts are Record Data in the subscriber company which are not synchronized.

Obsolete are Record Data in the subscriber company which no longer controlled by the master company. These records are probably deleted in the master company, and they are now released from the master company control. They can now be managed in the subscriber company.

History

The history group are cue tiles with shortcuts to processed data, but also to data prepared for synchronizing.



Subscriber Logs are holding data being synchronized for a specific data template. The data itself are stored in an xml document attached to the subscriber Log.

More the log has information on send-to-subscriber and updated-at-subscriber status.

Record Data are data to be handled by Global Master on a record level. From here you can even see what fields are handled by Global Master. The current values of the genuine data are to be seen here. In a subscriber company, Record Data are holding information on what fields the user cannot edit. It is the presence of a data record that is telling Global Master that a table or field is managed by Global Master.

Subscriber Record Data are data per record in a table handled by a data template to be send to a subscriber. Also, here status on the transactions is displayed.

Subscriber Field Values are data being synchronized to a subscriber on field level.

Role Center Actions

The role center does offer the user a number of quick access actions to a number of features for maintaining the Global Master data flow.

Setup

Global Master Setup

Set up current company.

Here you also have an easy way of selecting the Global Master Role Center as your personal role center.

Master Company

Create and send Subscriber Log

Select one or both the create and send options.



Create and Send

Creating the Subscriber Logs containing data to be transferred to subscriber companies immediately followed by sending the assembled data to the subscriber.

This feature is available in Master Company only.

Create

Creating the Subscriber Logs containing data to be transferred to subscriber companies.

This feature is available in Master Company only.

Send

Sending the Subscriber Logs containing data to subscriber companies.

This feature is available in Master Company only.

Synchronize Subscriber status

Requesting transfer and update status from subscriber companies.

This feature is available in Master Company only.

Subscriber Company

Update Record Data

Select one or both of the update end synchronize options.



Update and Synchronize

Importing data received from the master company and immediately hereafter making imported data available in the subscriber company.

This feature is available in Subscriber Company only.

Update

Importing data received from the master company ready for synchronizing to make the data available in the subscriber company.

This feature is available in Subscriber Company only.

Synchronize Making imported data available in the subscriber company.

This feature is available in Subscriber Company only.

Maintenance

Cleanup Subscriber Log

Remove data (XML) from the Subscriber Log after the synchronization of data already has been performed.

Subscriber Log records does have an attached XML document, containing data to be transferred to the subscriber company. Removing this XML document leaves the rest of the Subscriber Log with all other information than the data transferred.

Cleanup Subscriber Log Entries

Deleting Subscriber Log Entries after the synchronization of data already has been performed.

Role Center setup

You choose the Global Master Role Center as your personal role center easily from the Global Master Setup. Then you have easiest access to all Global Master functionality.

GENERAL SETUP

There are two basic things you need to set up before you set up the Data Templates. These are Global Master Setup and Partner Setup.

Global Master Setup needs to be set up in both Master Company and Subscriber Company, whereas Partner Setup is only set up in Master Company.

Master and Subscriber must have a unique Partner ID. It is not allowed to have companies with the same Partner ID.

The same rule applies to Data Templates (this is only a problem if we have multiple Master Companies). It is not allowed to have the same Data Template code in different Master Companies. If you have multiple Master Companies, we suggest you to use prefix or suffix that is unique for the individual Master Company.

Global Master Setup

This is the basic setup for Global Master functionality. The company can be setup as *Master, Subscriber* or *Master and Subscriber*.

Partner ID is the unique value for the partner. When setting up a Partner to connect to a subscriber ID in the Partner setup must be the same as Partner ID in the Global Master Setup.

B User Settings More options			
General			Show less
Company Type Master	~	Show History in Role Center	
Partner ID			
Master Company			
Max. No. of Nodes		Master: Delete Content Instantly	
Remove file contents older than (Master)			
Remove file contents older than (Master)			
			Show more
Remove file contents older than (Master) Subscriber Company Delete Entries Older Than		Subscriber: Delete Content Instantly	Show more
Subscriber Company		Subscriber: Delete Content Instantly	Show more
Subscriber Company Delete Entries Older Than			Show more
Subscriber Company Delete Entries Older Than			Show more
Subscriber Company Delete Entries Older Than			Show more
Subscriber Company Delete Entries Older Than			Show mon

To activate Global Master functionality the first requirement is to enter a value in Company Type and Partner ID in Global Master Setup.

General	
Company Type	Determining if the current company is <i>Master, Subscriber</i> or <i>Master and Subscriber</i> .
Partner ID	ID for the company used when synchronizing.
Show History in Role Center	Select if the History group is to be displayed in the role center. If not selected there is no access to the cues belonging to this group.
Master	
Max. No. of Records per Xml File	Enter a number of nodes for splitting the transactions into smaller parts whenever the number of nodes exceeds the "Max No. of Records per Xml File".
	This should make the transaction process smoother. A number larger than 10000 must be entered. Else leave 0 as the default value for not splitting the transactions.
Remove file contents older than (Master)	Enter a date formula with a time span of how old a Log entry has to be before removing file contents (XML document) will take place.
	The removing of the file contents will be performed by the function designated for this procedure: <i>Cleanup Subscriber Log</i> .
	Warning when entering date formula will appear:
	 When deleting Master IC File Log entries you loose the data trace option. Do you really want to open for deleting Master IC File Log entries? Yes No
Remove file contents immediately (Master)	With this option selected the XML file stored in BLOB field "File contents" on the Subscriber Log will be removed after use. This meaning that when the Subscriber Log has been sent to the subscriber company, the presence of the XML file is obsolete, and therefore it is removed.
	Please note that the Subscriber Log is copied to the subscriber company with the XML file contents included.

Subscriber	
Handle Data Files	This field is required to extract the data received from Master Company. The process "Update record data" extracts data into the Global Master record set.
	It is only possible to run this process in the Subscriber Company.
Synch. dataset	This field is required to update master data in the Subscriber Company.
	It is only possible to run this process in the Subscriber Company.
Only Synch. Net Changes	Global Master is only sending net changes to Subscriber. If we mark this field only these changes are synchronized at Subscriber.
Update older log first	Subscriber logs are processed sequentially sorted by the number. Selecting <i>"Update older log first"</i> ensures that the contents of a subscriber log, that is handling a certain table must be synchronized before the next subscriber log managing the same table is completed. This ensures the changes are synchronized in the correct order, if more changes are following each other.
Delete entries older than	Enter a date formula with a time span of how old a Log entry has to be before deleting the entry
	The removing of the file contents will be performed by the function designated for this procedure: <i>Cleanup Subscriber Log Entries</i> .
	Note: Date formula used for both Master and Subscriber.
Removing file contents older than (Subscriber)	Enter a date formula with a time span of how old a Log entry has to be before removing file contents (XML document) will take place.
	The removing of the file contents will be performed by the function designated for this procedure: <i>Cleanup Subscriber Log</i> .
Remove file contents immediately	With this option selected the XML file stored in BLOB field "File contents" on the Subscriber Log will be removed after use. This meaning that when the Subscriber Log has processed by the update to Record Data in the subscriber company, the presence of the XML file is obsolete, and therefore it is removed.

Setting up role center

A shortcut for setting up role centers for yourself or other users has been introduced. Instead of going through My Settings, where you can change your own role only, you can use the action button from Global Master Setup.

User Settings

Opening the User Settings list for setting up users.

Copying the entire subscriber company

Copy Subscriber Company

Copying a subscriber company into a sister subscriber company. See chapter Copy Subscriber Company for more information.

Setting up field blacklist

Some fields are not wanted in the field synchronization. For making fields unwanted and excepted from the data template setup a blacklist containing unwanted fields has been introduced to the system. A field entered in this blacklist will not be inserted in the data templates when using "*Insert all fields from table*" from the Data Template Card.

Access to the blacklist is found in Global Master Setup on the *Related* tab.

Blacklist S	etup Tables Wo	rk Date	: 25-01-2024		🗸 Saved 🗖 🏑		
,⊃ Sear	rch + New	🐯 Ed	it List 📋 Delete	Actions Fewer options	<i>⊵</i> ∧ ≣		
👪 Set	Default Blacklist		Delete Blacklist		5		
	Table ID ↑		Table Name	Table Caption	Blacklisted		
	3		Payment Terms	Payment Terms	Some Fields		
	4		Currency	Currency	Some Fields		
	9		Country/Region	Country/Region	Some Fields		
	10		Shipment Method	Shipment Method	Some Fields		
	15		G/L Account	G/L Account	Some Fields		
	17		G/L Entry	G/L Entry	Some Fields		
\rightarrow	18	÷	Customer	Customer	Some Fields 🗙 \cdots		
	21		Cust. Ledger Entry	Cust. Ledger Entry	Some Fields		
	23		Vendor	Vendor	Some Fields		
	25		Vendor Ledger Entry	Vendor Ledger Entry	Some Fields		
	27		Item	Item	Some Fields		
	32		Item Ledger Entry	Item Ledger Entry	Some Fields		
	36		Sales Header	Sales Header	Some Fields		
	37		Sales Line	Sales Line	Some Fields		

Here you have an overview of the tables with fields included in the blacklist. The provided action buttons can help you set up the blacklist.

Set default BlacklistSetting up a default blacklist provided by the Global Master
system. This setup can be modified after the initial setup.Please note that some fields will be mandatory blacklisted.
The "Blacklist" mark cannot be removed from fields which are
considered as mandatory blacklisted.Delete BlacklistRemoves all blacklist setup making it possible to build a new
blacklist from scratch.

Accessing the Blacklist Setup Tables where individual tables can be blacklisted by the following options:

Blacklisted

All fields The entire table is blacklisted and excepted from the "Insert all fields from table" function, used in Data Template.

Some fields

The fields marked "Blacklisted" in the "Blacklist Setup Tables" page are blacklisted and excepted from the "*Insert all fields from table*" function, used in Data Template.

Access to the Blacklist Setup Fields page is granted when clicking the assist button on Blacklist Setup Table lines marked "Some fields". Her the field list for the selected table can be managed.

Edit - Bla	cklist Setu	p Fields			2
,	🐯 Edit List	III Mark All Fields	🗮 Unmark All Fields	More options	Ê i
Tabl	e ID 🕇 🝸	Field No.↑	Field Name	Field Caption	Blacklis
	18	46	Priority	Priority	
	18	47	Payment Method Code	Payment Method Code	
	18	53	Last Modified Date Ti	Last Modified Date Time	~
	18	54	Last Date Modified	Last Date Modified	~
	18	80	Application Method	Application Method	
	18	82	Prices Including VAT	Prices Including VAT	
	18	83	Location Code	Location Code	
	18	84	Fax No.	Fax No.	
	18	85	Telex Answer Back	Telex Answer Back	
	18	86	VAT Registration No.	VAT Registration No.	
	18	87	Combine Shipments	Combine Shipments	
	18	88	Gen. Bus. Posting Group	Gen. Bus. Posting Group	
	18	89	Picture	Picture	~
	18	90	GLN	GLN	Π

The column Blacklisted is indicating if the field defined by the line is blacklisted or not.

Blacklisted

Marked (yes) meaning that the field cannot be inserted in templates.

Partner Setup

In the Partner list you can add and manage subscribers. A partner is a company which is receiving master data from the master company.

When added to the partner list, a partner can be attached to one or more templates as a "Template Subscriber".

	Actions Fewer options	
General		Show more
ID	S2	On Hold
Description	S2 Subscriber	Max. No. of Records p
Data Exchange Type	Database 🗸	
Connection Set Up		
Database		Web Service
Company Name	S2 Subscriber	AAD Tenant Id
		Environment Name
		Company Id
		Client Id · · · · · · ·
		Client Secret
		Subscriber Company
		Subscriber Display Na

Database Exchange Type Database: Exchange data with a Partner which is located in the same database Web Service: Exchange data with a Partner which is located in another SQL database. A Web Service is used.

with the same Partner ID.

On Hold	It is possible to set the Partner on hold. We will not exchange data if the Partner is on hold. Default value is Yes and can only be changed if mandatory fields are entered.
Description	If Description is empty when entering a value in Company Name then Description is set to Company Name.

Mandatory fields

"Company Name" is mandatory if Database Exchange Type is Database.

The four fields "Web Service Name", "Service Name", "User ID" and "Password" are all mandatory when Exchange Type "Web Service" has been selected.

Actions Test Connection

Test if we can contact the server. If connection is success test is also performed regarding Partner ID on Global Master setup is the same as the ID on the Partner card.

(j)	Connection to S2 succeeded.	
		ОК

Create Subscriber Log

This step creates a Subscriber Log containing and xml-file with all the data that needs to be send to the Partner. It is not sent to Partner in this step.

Only data from released Data Templates not "On hold" are used and only changed records from these Templates are collected.

Send Subscriber Log

Send all open Subscriber Logs to this partner

Test Connection

Setting up partners are essential for making the data synchronization work. Please make sure that the Partner ID in the subscriber companies are set up correctly.

									2
		New Manage	🚺 Test Connection	🕼 Create Subscriber Log 🛛 …			Ŀ	7 =	≡
10	D↑	Description	Data Exchange Type	Company Name	On Hold	Warning			
S	51	S1 Subscriber	Database	S1 Subscriber					
<u>s</u>	<u>52</u> :	S2 Subscriber	Database	S2 Subscriber		On Hold			

You can always use the "Test Connection" action in the Master Company to ensure that the ID's are matching each other. If not, you probably will experience an error message as shown below.

	+ + 1	New Manage 📝	Test Connection	📳 Create Subscriber Log \cdots			\$ 7 I
ID 1		Description	Data Exchange Type	Company Name	On Hold	Warning	
S1		S1 Subscriber	Database	S1 Subscriber			
S2		S2 Subscriber	Database	S2 Subscriber		On Hold	
<u>S3</u>	:	S3 Subscriber	Database	S3 Subscriber		On Hold	
		0.0					
		Parti	nection failed. Parti ner ID should be ch ort this issue >	ner ID at S3 Subscriber is S33. The nanged.	refore	1	

Also, the Partner cannot be marked "On Hold" if the synchronization should be activated. Make sure no partners you are expecting synchronized are "On Hold".

DATA TEMPLATE

Data Templates are used to set up data we want to exchange between Master and Subscribers. A Data Template contains table ID and a number of table fields to be transferred.

02-CUSTOMER							
New Process Master Data	Actions Related Fewer options						
Generelt							Show m
Code	02-CUSTOMER			Validate Record			
Description	Customer			Owned by Master			
Master Partner ID	· · · · · · M1			Sequence No.			
Owner Company Name	· · · · · · M1 Master			Status	Released		
Туре	· · · · · · · Normal Template			Released On	02-01-2023 12:46		
Table ID · · · · · · · · · · · · · · · · · ·			18	On Hold			
				onnoid			
Table Caption	Customer			Config. Template Code			
Table Caption	Customer						
Table Caption	Customer						ළු ම
	Field Caption		able Name		Table Relation	Field Data Template Code	InFormation Field
Lines Manage		Field Ta		Config. Template Code	Table Relation		InFormation
Lines Manage Field ID † 4	Field Caption Name 2	Field Tz	able Name Customer	Config. Template Code	Table Relation 0		InFormation Field
Lines Manage Field ID † 4 5	Field Caption Name 2 Address	Field Ta	able Name Customer	Config. Template Code	Table Relation 0 0		InFormation Field
Lines Manage Field ID † 4 5 6	Field Caption Name 2 Address Address 2	Field Ta C C C C C C C C	able Name Customer Customer	Config. Template Code	Table Relation 0 0 0		InFormation Field
Lines Manage Field ID † 4 5 6 7	Field Caption Name 2 Address Address 2 City Contact Phone No.	Field Tr C C C C C C C C C C C C C C C C C C C	able Name Customer Customer Customer Customer	Config. Template Code	Table Relation 0 0 0 225		InFormation Field
Lines Manage Field ID † 4 5 6 7 8	Field Caption Name 2 Address 2 City Contact Phone No. Territory Code	Field 77	able Name Customer Customer Customer Customer Customer	Config. Template Code	Table Relation 0 0 0 225 0		InFormation Field
Lines Manage Field ID † 4 5 6 7 8 9	Field Caption Name 2 Address Address 2 City Contact Phone No.	Field Tr	able Name Justomer Justomer Justomer Justomer Justomer	Config. Template Code	Table Relation 0 0 0 225 0 0 0		InFormation Field

To every Data Template there is a Master (Master Partner ID) and one or more subscribers. Master is the owner of the Data Template. It is only possible to change the Data Template in Master Company, and status must be "Under Development" in order to change the template settings.

It is possible to set filters to select a subset of the data. This could be finished goods, balance accounts etc. If the Data Template table have related data, you want to update together with this this Template you can do this.

If you have data directly related to a field, you can add a Field Template for this field. This could be General Business Posting Group.

If you on the other hand have data related to the table, you can add a Sub Template. This could be Item Cross Reference etc. Tables used as Sub Templates must have at least two fields in the primary key. The first must refer to the table from which Template the Sub Template is attached.

Data Template Card fields

Setting the template up requires that information is filled in in a number of fields in the template header.

Code	The code is a unique ID for the template.
	It is not allowed to use the same Data Template code in different Master Companies.
Description	Template description of your own choice.
	If Description is empty when entering a value in Table ID then Description is set to Company Name.
Туре	Type of the template will be used to determine the usage of the template and its fields.
	<i>Normal Template</i> Data from templates fields are synchronized to the subscriber.
	Field Template Data from the field templates fields are synchronized when a Normal Template is referring to the Field Template in a line with a field containing a table relation. Field templates are used for data related to a field in the normal template field. Only the used value will be transferred to the subscriber.
	Sub Template Data from the sub templates fields are synchronized to the subscriber when a normal template with the sub template attached is processed. Sub templates are used for data from tables with indirect relations. All values are transferred.
	See <u>Appendix</u> for more information on using field- and sub templates.
Table ID	Table number for the data to be defined in the current template.
	When a table number is selected the Description field of the template header will be filled in automatically.
	The Table ID field is a lookup field referring to all tables in the database which are not excepted from use in the Global Master.
Table Caption	Name of the table handled by the template.

Sequence No.

Released On

Sub Templates Exists

On Hold

Status

Is mostly interesting when the Description field is used for a description different from the table name.

Number used for sorting within the templates belonging to each template type.

Status is indicating the state of the template.

Under Development

The template and its settings can be modified. When under development, the template is "On Hold" meaning that it is excepted from synchronization.

Pending Approval The template is "On Hold" and cannot be synchronized.

Released

The template is activated for synchronization.

Do you want to change Status to	Released?
	Yes No

When changing status to "Released" the so called Record Data are updated. These are the data to be synchronized.

Date and time stamp for when status set to "Released".

When "On Hold" the template is not processed when creating Subscriber Logs.

However, changes are still being recorded in Record Data if the template is Released, even if the template is "On Hold".

Showing if Sub Templates are attached to the template.

Config. Template Code	Attached Standard Configuration Template to be used by the subscriber when adding new records in the subscriber company.
	Please see the "Configuration Template" chapter.
	Check Field Value Update Activate the post processing of the current template, that is checking and updating Field Values.
	<i>All</i> Check all field values.
	<i>Recently updated</i> Consider the date formula entered in field "Recently updated time span" when processing the post processing to determine how recent the changes are allowed to be for being included.
	The field value update post processing can be activated from the Action tab or by setting the job queue up to handle the check procedure frequently.
Recently updated time span	Date formula setting the time frame for how old changes can be, when qualifying changes to be postprocessed by the field value update control.
	Please note: The date formula must start with minus (-) to calculate a valid start limit.
	Example: -3D meaning that changes logged within the last three days will be checked and updated.

Data Template Card actions

A few actions on the *action* tab are useful when working with the templates.

Create/Update Record Data	Creating Record Date for the current template.
	Note: This action should be performed automatically when setting the template status "Released".
	It is only possible to run this process in the Master Company.
Check Field Value Update	Check and update Field Values logged compared with the current values in data.
	Settings in fields "Check Field Value Update" and "Recently updated time span" will qualify Record Data and Field Data to be processed.
Sync. Company	Synchronize the current template. All waiting synchronizations for the current table are processed
	It is only possible to run this process in the Subscriber Company.
Choose fields from table	Select fields to be synchronized with the template. Already chosen fields are marked blue in the list page which are displaying all fields to be selected.
	<i>Hint:</i> If a table field does not appear in the list, please check the Blacklist Setup in page Global Master Setup.
Copy Template	Copy existing template and its settings into a new template Code.
	Lines are included. If chosen, references to attached Field Data Templates are transferred as well.
	If selected by option, Record Filters are copied to the new code.
	Please note that subscribers not are copied. These are to be maintained manually.
	A useful feature for when working with different template filters etc.
Set Status Under Development	With one click all data templates with status "Released" will be set to status "Under Development". Data templated with status "Pending Approval" are not changed.
Set Status Released	With one click all data templates with status "Under Development" will be set to status "Released". Data templated with status "Pending Approval" are not

	changed.
Create and send Subscriber (Current Template)	Performing the action known from the Global Master role center, but for the current template only.
Send Template definition only (Current Template)	Process starting synchronization of a single template definition from the master company. Template managed data are not synchronized.
From the <i>Navigate</i> tab you can get an overview of	attached data.
Record Filters	It is possible to setup filters if you do not want to exchange all records in this table.
Subscribers	Here you add Subscribers to which you will exchange data defined in the current Data Template.
Sub Template link	Data related to the template tables primary key fields can be added using a "Sub Data Template Link".
	When a Sub Template is linked to template, the data described in the Sub Template will be synchronized to the subscriber company.
	All records from the table will be synchronized.
Record Data	Get an overview of the Record Data attached to the current Data Template prepared for the synchronization.
Subscribers Record Data	Record Data for individual subscribers are displayed here.
Log Entries	Displaying Log Entries attached to the current template.
	Log Entries are present in the Subscriber Companies only.

Data Template List actions

The list page of the Data Templates does have some useful action features in the Actions tab.

Set all to Under Development	With one click all data templates with status "Released" will be set to status "Under Development". Data templated with status "Pending Approval" are not changed.
Set all to Released	With one click all data templates with status "Under Development" will be set to status "Released". Data templated with status "Pending Approval" are not changed.
Set On Hold	Setting a "On Hold" checkmark directly from the list page.
Activate	Resetting (removing) "On Hold" checkmark directly from the list page.
Synchronize Record Data (Current Template)	An alternative to the "Update and Synchronize Record Data" in the Global Master Role Center is to use this function. Only the current template will be synchronized.
	Please note that Record Date have to be updated before this function is started.
	This action is for use in subscriber companies only.
Set up Data Templates	Select an area for which a number of data templates will be created according to GM standard settings. These can be modified for customized use if necessary.
Set up Subscribers	Using a wizard you can easily select a number of subscribers to be attached to the current Data Template.
Super User features Handling unusual circumstances might require spe That is why the <i>Global Master Super</i> profile gives a	
Mark template changed	To force an update of the template definition, the Super User can use this action to raise the "Field added" flag.
Create/Update Record Data (all Data Templates)	A function corresponding to the one on the Template Card, but handling all templates instead of the current only, will be started using this action. This feature is very powerful, when a complete update is desired. Select the "Force Full Update" option in the request form which appears with this action or change the filter to suit your demands.

Set up Data Templates

When activating "Set up Data Templates" from Data Template List the user can select among pre-defined areas for which Data Templates will be created.

Data Template Setup	2	~ ×
Welcome to the Data Template Setup. H	lere standard Data Templates are set u	p.
There is no data in the Data Template ta	able. The wizard is provideding some d	efault
values. Click "Next" to create and and re	view the data.	
Select Option U	ser defined	~
Dimension · · · · · · · · · · · · · · · · ·	\supset	
Bank Account	\supset	
G/L Account	\supset	
Customer · · · · · · · · · · · · ·	\supset	
Vendor · · · · · · · · · · · · · · · · ·	\supset	
Item · · · · · · · · · · · · · · · · · · ·	\supset	
	Back Next Fir	nish
	Back Next Fir	nisn

Wizard step 1: Select among standard data templates and continue by clicking "Next".

The option box does have three options which are helping for fast filling in the checkboxes.

All	~
User defined	~
All	
None	

Options

User defined – Select by clicking checkboxes All – All checkboxes will be marked. None – Marks in checkboxes are removed

Click "Next" when the desired checkboxes are filled out.

Data Template	Setup		2 X
Code 1	Description	Table ID	Table Caption
→ <u>01-DEFAUL</u>	Default Dimension	352	Default Dimens
01-DEFAUL	Default Dimension	352	Default Dimen
01-DEFAUL	Default Dimension	352	Default Dimen
01-DEFAUL	Default Dimension	352	Default Dimen
01-DIM	Dimension	348	Dimension
01-DIMVAL	Dimension Value	349	Dimension Val
4			
			,
	Back	Next	Finish

Wizard step 2: Created data templates are displayed. Click "Finish" to end the wizard.

Subscriber setup

When activating the action "Set up Subscribers" from the Templates list a wizard will guide you through selection of a number of subscribers, which are attached as subscribers to the current data template. The current template is the template on the line with focus in the Templates list.

Subscriber Setup	2 X
Welcome to the Subscriber Setup. Here sub chosen.	oscribers for the current data template are
6	
	Back Next Finish

Wizard step 1: Displaying welcome instructions only. Click "Next" to continue.

	Subscriber Partner ID ↑ ▼		Description	Add to Data Template
\rightarrow	S1	- :	S1 Subscriber	✓
	S2		S2 Subscriber	
	S3		S3 Subscriber	

Wizard step 2: Mark partners to be added as subscribers.

Choose the partners you want to subscribe to the current template by inserting checkmarks in the checkboxes. Click "Finish" to complete the selection.

Afterwards the selected partners will occur as subscribers. Check this out from the Template Card clicking on the "Subscribers" button in the Navigate tab.

Resending data to subscriber

If you need to make it possible for transferring a Data Template to a given subscriber, even if the "Data Template Logged" field on the subscriber is marked, a function can remove this "Data Template Logged" mark for resending the data with the next synchronization.

On the Data Template Subscribers page, you will find the action button to clear the "Data Template Logged" field. The button is named "Resend Data Template".

Data Template Subscribers Work Date:	25-01-2024				√Saved 🖬 🥕
	🗓 Delete 🔮 Resend Data Template				┢ 7 ≣
	Partner On Hold Partner Warning	causes the Subscriber Template to be resend with next synchronization. Subscriber Company Name	т	Data lemplate .ogged	Data Logged On
→ <u>51</u> ~ :	No	S1 Subscriber			02-01-2023 12:50

Set up Data Templates for partner

Adding a new partner when a number of useful templates already are available, will set the user in another perspective regarding how to add more templates to a specific partner (subscriber).

For this Global Master has a wizard named "Set up Templates", which can be started from the Action tab in the Partners page.

rarchero	Work Date: 2					
,∕⊃ Sea	O Search + New Manage		🗊 Test Connection	🗐 Create Subscriber Log		☞ 7 ≡
ID 1	De	escription	Data Exchange Type	🗟 Send Subscriber Log	On Hold Warning	
<u>S1</u>	: S1	1 Subscriber	Database	S1 🕤 Set Up Templates		
S2	S2	2 Subscriber	Database		et Up Templates	
S3	SB	3 Subscriber	Database	S3 Subscriber		

Select a partner in the Partners page and start the "Set up Templates" wizard. After pressing "Next" a list of templates to select are displayed.

	mplate Setup		ave to be added. Click "Next" to	add sele	\mathcal{Z} $ imes$ cted templates.
	Data Template Code ↑ ▼		Description	Add to Subs	Туре
\rightarrow	01-COUNTRY	÷	Country/Region	~	Field Template
	01-GENBUSPO		Gen. Business Posting Group	~	Field Template
	01-POSTCODE		Post Code		Normal Tem
	02-CUSTOMER		Customer	~	Normal Tem
			Back	Next	Finish
			and the	115/15	

Mark the checkboxes for the desired templates to add as template subscribers to the current template and press "Finish" to create.

Data Template Filter

You might have a situation where you don't want to synchronize all records in a table. Maybe a certain subscriber needs a partial range of the customers available in the master company only.

Adding a Data Template Filter to a Data Template ensures that only records within the filter will be processed by the Global Master synchronization.

Even data template filters in a sub template can be very useful.

Take an example with the Item Cross Reference, where the table contains references between between items and a customer, a vendor or a bar code.

From the normal template for the Itemtable a Sub Data Template Link connecting to the template handling table "Item Cross Reference" should be defined.

In a case where you are synchronizing customers but neither vendors nor bar codes, it is not desired to synchronize all contents of the Item Cross Reference table.

Here a filter attached to the Item Cross Reference template would make sense.

The template has to be "Under Development" when you want to add a data template filter.

In the Data Templates list or in the Data Template card, please navigate to the "Record Filters" action button.



Adding a Data Template Filter on the Item Cross Reference template, including only data with "Cross Reference Type=Customer" ensures transfer of data from the table with references to customers alone.

Data Ter	nplate Filters Wo	ork Date: 2	5-01-2024		Not saved	ď	2
,∕⊃ Se	arch + New	🐯 Edit L	ist 📋 Delete		Ŕ	\mathbb{V}	
	Field ID	Ť	Field Caption	Filter			
\rightarrow		4	Cross-Reference Type	Customer			

Now the value of the Item Cross Reference will be taken to consideration before including the cross reference in the dataset to be synchronized.

UPDATE DATA

GM update data in different steps. First steps is in the Master Company where we generate the data for Subscribers. Last steps is in the Subscriber Company where we receive and process the data from Master Company.



Besides Master Data updating, GM also keeps track of the status of this. In the Master Company, we can see if the Subscriber has updated the Record Data and more important if, Subscriber has synchronized data.

GM provides possibility to schedule jobs to handle all steps automatically. In the Master Company, it is also possible to update GM Record Data automatically when you change Master Data.

If you have scheduled steps to be processed it is still possible to process these manually¹. This could be the case if we need to push data to a Subscriber outside the scheduling periods. In this case, Subscriber also have to handle the incoming data manually.

See Chapter The Data Transfer Process.

¹ Please note that long lasting synchronizations can lock each other since writing in the database can cause tables to be locked during the process.

UPDATE STATUS

GM provides status on two levels in Master Company. First level is the Subscriber Log that contains data for each Subscriber Company to be synchronized. Next level is on Subscriber Record Data which holds all details with single field values.



Subscriber Log

Here you can see if the Subscriber Log has been send to Subscriber. GM logs this in the fields "Data Send" and "Data Send On". Furthermore, it is possible to see if Subscriber has updated the data.

This requires that you run the status update job (Synchronize Subscriber Status). GM logs this in the fields "Data updated (Subscriber)" and "Data updated On (Subscriber)".

Q Search	🔎 Search Manage 🚟 Update Record Data (Current Log) 🗄 Show XML Document 🗎 Show Response Message 🖷 Subscriber Record Data 🛛 More options								IA .	7 🗉				
/ 5001011	manage	and opposite record of	, and (carres											u
Subscriber Partner ID ↑		ster tner ID↑ Er	intry No. †	Subscriber Company Name	Owner Company Name	Data Template Code	Creation Date	Data Sent	Data Sent On	Data Upd (Sub	Data Updated On (Subscriber)	Error Text		
S1	: M		1	S1 Subscriber	M1 Master	01-GENBUS	02-01-2023		02-01-2023 12:50		02-01-2023 13:36			

Subscriber Record Data

Here you can see if the Subscriber Record Data has been included in Subscriber Log. GM logs this in the fields "Data Logged", "Data Logged On" and "Subscriber Log Entry No."

Furthermore, it is possible to see if Subscriber has synchronized the data. This requires that you run the status update job (Synchronize Subscriber Status). GM logs this in the fields "Data Sync. (Subscriber)" and "Data Sync. On (Subscriber)".

	Options												
	Partner Filter					Show only r	ecords not sent -						
	Data Template Filter					Show Only	Not Synch. Record	ls					
	🔊 Show Record Data	🍖 Remove Sent Mark	🗞 Remove Sent Mark (Curre	nt record)								ß	7
	Subscriber Partner ID↑	Table ID	Table Caption	Primary Key		Data Sent	Data Sent DateTir	Data Sync. ne (Subs	Data Sync. At (Subscriber)	Subscriber Log Entry N	No.	of Log Entries	Obs
\rightarrow	S.1	250	Gen. Business Posting Group	Code=EX	PORT	~	02-01-2023 12:	:50	02-01-2023 13:36		.1	1	
	S1	250	Gen. Business Posting Group	Code=DC	MESTIC		02-01-2023 12:	:50	02-01-2023 13:36		1	1	
	S1	250	Gen. Business Posting Group	Code=EU			02-01-2023 12:	:50	02-01-2023 13:36		1	1	
	S1	18	Customer	No.=0112	1212							1	
	S1	18	Customer	No.=0144	5544	~	02-01-2023 12	:50	02-01-2023 13:36		2	1	
	S1	18	Customer	No.=0145	4545	~	02-01-2023 12	:50	02-01-2023 13:36		2	1	
	S1	18	Customer	No.=0190	5893	~	02-01-2023 12:	:50	02-01-2023 13:36		2	1	
	S1	18	Customer	No.=0190	5899	~	02-01-2023 12:	:50	02-01-2023 13:36		2	1	
	S1	18	Customer	No.=0190	5902	~	02-01-2023 12	:50	02-01-2023 13:36		2	1	
	S1	18	Customer	No.=1000	0	~	02-01-2023 12	:50	02-01-2023 13:36		2	1	
	S1	18	Customer	No.=2000	0	~	02-01-2023 12	:50	02-01-2023 13:36		2	1	
	S1	18	Customer	No.=2030	9920		02-01-2023 12	:50	02-01-2023 13:36		2	1	
	S1	18	Customer	No.=2031	2912		02-01-2023 12	:50	02-01-2023 13:36		2	1	
						_					-		
	Subordinary Subscri	iber Field Values										Ľ	2
	Field Caption		Field Value (XML)		Field Value (Localized)		Data Sent	Data Sent At	Data Sync. (Subscr	Data Sync. On (Subscriber) C	Ob Da Obsolete Ser		
	Code		EXPORT		EXPORT			02-01-2023 12	:50 🛛	02-01-2023 13:36			
	→ Description		Other customers and ve	adors (not EU)	Other customers and ve	ndors (not F	U) 🔽	02-01-2023 12	:50	02-01-2023 13:36			

If records are marked as Obsolete this means that, the record has been sent to Subscriber previous but is now not part of Data Template.

ERROR HANDLING

If you synchronize record data in Subscriber Company, then sometimes you will experience errors on some of the records.

If you look at your Record Data errors are highlighted in red. If you have not synchronized Record Data, you will see these highlighted in yellow.

To see the error, go to the record and choose Log Entries

SUBSCRIBER PERMISSIONS

If you subscribe for data from a Master Company then Master Company owns these data. That is, you cannot change data you received from Master Company.

An example could be that Master Company owns your Customer table. If you try to change some of the fields provided by Master Company, you will get an error.

In the example below, it is intended to change the address of the customer, which results in an error. You will also get an error if I try to delete or rename the customer.

Example with modification

8 Address is controlled by Global Master and cannot be changed locally, because the record is attached to Data Template Code 02-CUSTOMER.

Example with deletion

😢 It is not allowed to delete Customer , because the record is attached to Data Template Code 02-CUSTOMER.

Example with rename

😢 It is not allowed to rename Customer , because the record is attached to Data Template Code 02-CUSTOMER. (Select Refresh to ...
THE DATA TRANSFER PROCESS

This chapter describes how to synchronize data step by step.

Please note that actions must be performed in both master and subscriber companies. If more subscriber companies are to be handled, the actions described for the subscriber company must be performed in every single subscriber company.

Data to be transferred are stored in the Subscriber Logs. Here you will find an XML Document containing the detailed transactions to be sent.

The Subscriber Log also holds information on creation date, sent time and updated on subscriber time. There is one Subscriber Log for every template subscriber.

Create and send Subscriber Log from master company

To activate the synchronization, press the "Create and send Subscriber Log" action button in the role centers ribbon.

M1 Master Setup V Master Company	$\scriptstyle{ imes}$ Subscriber Company $\scriptstyle{ imes}$ Maintenance $\scriptstyle{ imes}$ $ig $ \equiv
Create and send Subscriber Log Synchronize Su	ıbscriber Status
() OCreate	
 Send Create and Send 	
ок	Cancel

You can choose to create and send separately or performing both steps combined.

Create	Subscriber Logs are created for the templates which are released. Templates on hold are not processed.
Send	The contents of the Subscriber Logs are sent to the subscriber companies.
	In the Subscriber Record Data and Subscriber Field Values the records will be marked Sent. Still yellow since they are not synchronized in the subscriber company.
Create and Send	Performing both of the above described functions.
Next action takes place in the subscriber company	<i>.</i>

1 1 7

Update and Synchronize Record Data in subscriber company

In the subscriber company, there are still a few tasks to be performed before the data are received and ready to be used here.

The Subscriber Log has been updated when the Send activity was performed in the master company. In our example we can see that one template was sent.

Press "Update and Synchronize Record data" to proceed.

S1 Subscriber Setup ~	Master Company \vee Subscriber Company \vee Maintenance \vee \equiv
Update and Syze Record Data	
 ↓ Update ○ Synchronize ● Update and Synchronize OK Car 	ncel
Update	Data are received from the XML document of the Subscriber Logs. Data are stored in Record Data
Synchronize	Data are synchronized from the Data records into the corresponding data tables.
	Subscriber Log Entries are now present in the subscriber company.
	After the synchronization the data are ready to be used in the subscriber company.
Update and Synchronize	Performing both of the above described functions.
Next action takes place in the master company.	

Synchronize Subscriber status in master company

Now the subscriber company have been synchronized, we do have to fetch the subscriber status to complete the entire synchronization process.

Activate the "Synchronize Subscriber status" in the role centers action ribbon.

M1 Master Setup ~ <u>Master Company</u> ~ Subscriber Company ~	Maintenance \vee	=
Create and send Subscriber Log Synchronize Subscriber Status		
Do you want to synchronize status for Record ID Subscriber and Subscriber Log?		
Yes No		

Now the lines in both Subscriber Record Data and in Subscriber Field Values are marked with "Data Synchronized" and they are not yellow anymore.

Note: Partners "On Hold" will not have the status updated.

The synchronization process is completed.

Examining the result of the data transfer process

After the synchronization process is completed, it is always a good idea to take a look on the result. Check if the expected data was transferred into the target tables in the subscriber company.

Even if the Subscriber Log is regarded as completed, that is if both fields "Data Template Sent" and "Data Updated" are marked, the final step synchronizing the data into the genuine target tables might have been unsuccessful.

Example: Customer with validation of field "Salesperson Code"

Some fields are validated when filled in by a user. This is to verify if references and business logic is accepting the data set into the field.

Take a look on the data template below. The line set up to synchronize field 29 'Salesperson Code' has a checkmark in "Validate Field". When synchronized into the subscriber company the validation code on this field will be processed.

02-CUSTOMER								
New Process Master Data	Actions Related Fewer options							
Generelt							Show	more
Code · · · · · · · · · · · · · · · · · · ·	02-CUSTOMER			Validate Record				
Description	لي Customer			Owned by Master				
Master Partner ID	M1			Sequence No.				0
Owner Company Name	M1 Master			Status	Released			
Туре	Normal Template			Released On	04-01-2023 14:02			
Table ID · · · · · · · · · · · · · · · · · ·			18	On Hold				
Table Caption	Customer			Config. Template Code				
Lines Manage							Ċ	62
Field ID ↑	Field Caption	Validate Field	Table Name	Comment	Table Relation	Field Data Template Code	InFormation Field	
7	City		Customer		225			^
8	Contact		Customer		0			
9	Phone No.		Customer		0			
15	Territory Code		Customer		286			
29	Salesperson Code		Customer		13			
	Blocked		Customer		0			

The template is released to generate subscriber record data. A subscriber Log is created and sent. Then the data was updated and synchronized in the subscriber company.

After the update and the synchronization both have been performed in the subscriber company the subscriber log was marked with "Data Template Sent" and "Data Updated" information. So far it looks perfect.

Data Template Code	Creation Date	Data Sent	Data Sent On Y	Data Upd (Su	Data Updated On (Subscriber)	Error Text
02-CUSTO	04-01-2023		04-01-2023 14:03		04-01-2023 14:03	

Time stamps were successfully added, and no error text appears.

However, the synchronization process comes after a successfully performed data update. The data update is generating Record Data to be synchronized into the actual target table.

Regarding the Record Data some customer lines are appearing red and with error messages.

Record Data	Γ	Table ID		Table Caption	Primary Key	Data Sync. (Sub	Data Sync. On (Subscriber)	Obs	Han	٦
700	\rightarrow	18	÷	Customer	No.=01121212					^
		18		Customer	No.=01445544					
		18		Customer	No.=01454545					
		18		Customer	No.=01905893					
		18		Customer	No.=01905899					
>		18		Customer	No.=01905902					
		10		Curtan	No - 10000					-

Use the "Log Entries" button to see what error message is describing the detected problem.

Subscrib	per Log Entries					√ Saved		ದ್ , "
∕⊃ Se	arch Manage 🛱 Show Record	d Data					Ŕ	7 ≣
	Data Template Code 4 🖤		Record ID	Synchronization Date	Status 🐨	Error Message		
\rightarrow	02-CUSTOMER		Customer: 01121212	04-01-2023 14:03	Error	Privacy Blocked must not be true for Salesperson JO.		

The error message 'Privacy Blocked must not be true for Salesperson JO.' Indicates that the field "Privacy Blocked" is set on salesperson 'JO'. Then it is not allowed to set 'JO' in field Salesperson Code on a customer.

When you are experiencing such error messages, it must be considered how to fix the problem. In this case it seems that salesperson 'JO' didn't have "Privacy Blocked" in the master company, at the time the customers "Salesperson Code" was set on customer '01121212'.

You must fix the problem in the master company, and then synchronize the data again to have data in the different tables correspond correctly with each other.

Feature: Force Full Update

If the data for some reason was not correct updated Global master provides a function which should help making the update complete.

In the Data Template Card, you will find the action "Create/Update Record Data".

Global Master Data Template Work Date: 25-01-2024		√Saved ⊏ ₇ ≮
New <u>Process</u> Master Data Actions Related Fewer options	ds from table 🔊 Set Status to Under Development 💰 Set Status to Released	-12

When starting the report, you are presented the option "Force Full Update". If you select this mark, the template is forced to be updated at once, when the OK button is pressed.

Create/Update Record Data	a		2 ×
Options			
Force Full Update			
Full Update Subscriber			
Filter: Template Header	01-POSTCODE		~
+ Filter			
Advanced >			
		ОК	Cancel

A brand-new set of Subscriber Logs are created. Data to be transferred are stored in the Subscriber Logs. Here you will find an XML Document containing the detailed transactions to be sent.

Important notice:

Now the data still have to be synchronized to the subscribers. This is not performed with this feature.

Feature: Check Field Value Update

It is possible to perform a post processing comparison of logged changes and the current values in live data. For tables you need to verify you must set up the template fields "Check Field Value Update" and "Recently updated time span" to enable the check procedure.

Please refer to the template header card fields description in the Data Template chapter.

The feature is executed from the Actions tab in the template card or by adding the task Report 6208199 in the job queue.

Feature: Resend Data Template

If you need to make it possible for transferring a Data Template to a given subscriber, even if the "Data Template Logged" field on the subscriber is marked, a function can remove this "Data Template Logged" mark for resending the data with the next synchronization.

[Data Template Subso	nocio i work out	01 2024					🗸 Saved 🗖 🧏
		w 😨 Edit Lis	t 📋 Delete	Sesend Data Template				& 7 ≣
	Subscriber Partr	er ID ↑	Partner On Hold	Partner Warning	ubscriber Template to be resend with next synchronization. Subscriber Company Name	Comment	Data Template Logged	Data Logged On
	\rightarrow S1	~ :	No		S1 Subscriber			02-01-2023 12:50

On the Data Template Subscribers page you will find the action button to clear the "Data Template Logged" field.

Feature: Resend Subscriber Log

Once a Subscriber Log has been marked in the "Data Template Sent" field, this specific transaction is considered sent to subscriber company.

As a troubleshooting action, the system provides an option to resend the already sent Subscriber Log.

In the Subscriber Log page, you will find an action named "Resend Subscriber Log" located in the action tab.

Subscriber Logs Work Date: 25-01-2024											, 🖬 📕
🔎 Search Manage 🛛 Update Reco	rd Data (Curre	nt Log) 🖹 Show XML Do	cument 🖹 Show Respons	e Message 🛛 🖩	Subscriber R	ecord Dat	a <u>Actions</u>	Fewer op	otions		┢ ७ ≣
∮ Functions ∨											-0
🛲 Update Record Data (Current Log)	Entry No. †	Subscriber Company Name	Owner Company Name	Code	Date	Sent	Data Sent On	(Sub	(Subscriber)	Error Text	
🗳 Resend Subscriber Log 🛛 🕅	1	S1 Subscriber	M1 Master	01-GENBUS	. 02-01-2023		02-01-2023 12:50		02-01-2023 13:36		
		ubscriber Template to be resend wit			02-01-2023	_	02-01-2023 12:50		02-01-2023 13:36		

Activating this button the field "Data Template Sent" will be cleared together with "Data Sent On" time stamp. Hereby the Subscriber Log can be send once more.

With the next "Send Subscriber Log" action the reopened Subscriber Log will be send to the subscriber.

Feature: Update older log first

To ensure that data are updated in the subscriber company in the order the data originally was changed and logged in in the master company, a setting in Global Master Setup can be set.

Subscriber Company	Show less
Handle Data Files	Delete Entries Older Than
Synchronize Dataset	Delete File Content Older Than
Only Synchronize Net Changes	Subscriber: Delete Content Instantly
Update older log first	Override Delete Restriction

Setting a checkmark in field "Synch. Older log first" will activate a verification ensuring that a newer log referring to data in the same table as for an older not completed log cannot be processed first.

í	Option "Update older log first" is now activated.
	Setting this opion disables processing of younger subscriber logs until older subscriber logs referring to the same table are completed. This is to enforce that data are updateed with the same ranking they origanally were changed.
	ОК

Now the subscriber company function "Update Record Data" will skip processing younger subscriber logs, if there are one or more older subscriber logs handling data for the same table as the one to be processed.

Even if you use the "Update Record Data (Current Log)" in the "Not Completed Subscriber Log" page, the option will not allow to process the younger log before an older one. You will get an error message as displayed below.

!	Option "Update older log first" is active. You cannot update record set from this subscriber log before all older logs handling the same table are completed.
How	to report this issue >
Was t	his information helpful? 🖒 Yes 🖓 No 🛛 OK

CONTACT INFORMATION

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Feature: Update and synchronize Record Data (Current Log)

When a Subscriber Log has been sent to the subscriber company it is normally processed together with other subscriber logs, using the normal update and synchronization options or by jobs set up in the Job Queue.

However, it is possible to update one single Subscriber Log. This can be useful in cases where you want to follow the handling of one specific table.

In the "Not completed Subscriber Log" page select the action buttons "Update Record Data (Current Log)" or "Update and synchronize Record Data (Current Log)".



Feature: Show XML Document

In pages listing Subscriber Logs, you are able to see the contents of the XML Document, which is the data being transferred from master to subscriber. Select the action button "Show XML Document".



Feature: Use Template Sequence No. to determine template processing rank

The order Data Templates are processed in are controlled by three fields on the template header. The order is important in the subscriber company, because data in a certain field can be dependent of already available date in case of references to a parent table etc.

Use the naming of Data Template Codes together with the Sequence No. to control in which order the data will be synchronized in the subscriber company.

Туре	The field Type can have three values. Field Template, Normal Template and Sub Template. The options are explained in chapter <i>Data Template Card Fields</i> .
Sequence No.	This field is used to set the sorting within the template type when processing Data Templates. Here you set up an integer no. control the sorting, if you want another sorting, than when Data Templates within the template type are sorted by the templates Code.
Code	Code is the primary key of the Data Template table. Combined with the two fields "Type" and "Sequence No." this field will be used for sorting for Data Templates within the same Type and with the same Sequence No.

The sorting used when processing templates are Type, Sequence No. and Code. The ranking of Type is "Field Template", "Normal Template" and "Sub Template".

JOB QUEUE SETUP

We have jobs to handle all steps in Global Master. In this section, it is described which objects to call to schedule these steps using the Job Queue.



Master

Record Data Set Update Record Data Set:

Codeunit 6208197 GM Create Record Data PROF

If you have set "Auto Update Record Set"² in Global Master Setup, you do not need to schedule this job. When setting the Auto Update Record Set you need to run the batch job once to update record data for master data that have been changed but not updated.

Check Field Value Update	Report 6208199 GM Check Field Update Prof Performing check to ensure that logged changes are up to date.
Subscriber Log Create Subscriber Log:	Codeunit 6208207 "GM Create Subscriber Log PROF"
Send Subscriber Log:	Codeunit 6208202 "GM Send Subscriber Log PROF"
Create and Send Log:	Codeunit 6208205 "GM Create and Send Log PROF" Including both of the two mentioned above to ensure data are ready to be send.
Synchronize Subscriber Status	Report 6208193 "GM Update Status PROF"

² "Auto Update Record Set" is not optional in the NAV 2018 and 365 BC versions. This feature will be performed by default.

Subscriber

Record Data Update Record Data:

Synchronize Record Data:

Codeunit 6208208 "GM Handle Subscriber Log PROF" Codeunit 6208195 "GM Synch. Company PROF"

See chapter Maintenance for available cleanup jobs.

Update and Synchronize Record Data Update and Synchronize Record Data:

Codeunit 6208206 "GM Upd. and Synch. Record PROF" Including both of the two mentioned above to ensure data are ready for synchronization.

Jobs scheduled to run repeatedly with intervals

Find Job Queue by searching for Job Queue Entries.

Example of Job Queue Entry scheduling Codeunit 6208205 "GM Create and Send Log PROF". You can also schedule this to run several times per day.

Job Queue Entries Work Date: 25-01-2024	Queue Entry Card Work Date: 25-01-2024 🖉 🖻	+ 💼 ✓ Saved ◻ 🦯	√Saved 📕 🖬 🧝
🔎 Search 🕂 New 😨 Edit List 🗎	Codeunit · 6208205 · GM	Create and Send Log	ries 🛛 More options 🖻 🏹 🗮
Status User ID	PROF	<u> </u>	No.c Minute t Start Rec betweei ime Sch Job Run
→ <u>On Hold</u> : ARMIN	Process Reports More options		1
On Hold ADMIN	General	Show more	Image: 1
	Object Type to Run · · · · · Codeunit 🗸	Earliest Start Date/Time · · · 🛅 ····	
	Object ID to Run	Job Timeout · · · · · · 12 hours	
	Object Caption to Run · · · GM Create and Send Log PROF	Status On Hold	
	Description GM Create and Send Log PROF		
	Recurrence		•
	Recurring Job	Next Run Date Formula	
	Run on Mondays · · · · · ·	Starting Time · · · · · · 10:00:00	
	Run on Tuesdays · · · · · ·	Ending Time 16:00:00	
	Run on Wednesdays	No. of Minutes betwe 15	
	Run on Thursdays · · · · · ·	Inactivity Timeout Peri 5	
	Run on Fridays		
	Run on Saturdays		
	Run on Sundays		

Job Queue Batch

Running all templates with one job might require a larger number of resources. To make jobs running more smoothly, Job Que Batches are introduced.

A Job Queue Batch makes it possible to group a number of templates in a batch. This batch will then be processed by a dedicated Job Queue Entry.

Job Queue Batches are accessed from the Global Master role center, from the role explorer or by using the search field.

	Job Queue Batches Work	Date: 25-01-2024			√ Saved	L C	2	
	Filter Batch Code	M-BATCH-1	→ Batch Descrip	tion · · · · ·	Customer			
	Manage Actions	Fewer options				Ŕ	\mathbb{V}	
	Template Code ↑	Template Description	Template Table ID	Template Table		Template uence No.	Sortir	ng
>	02-CUSTOMER	Customer	18	Customer		0		

Add the number of templates you want to group, and set the "Parameter string" in a Job Queue Entry. The parameter string is used as a filter for which templates to be processed. See an example on next page.

A Job Queue Batch can be set on hold for a period by marking the "On Hold" field in the Job Queue Batch List.

	Selec	t - Job Queue Batch List	م) 🗸 🕂 New	🗊 Edit List 🛛 …	2 ×
L		Code 1		Description		On Hold
	\rightarrow	M-BATCH-1	:	Customer		
L		M-BATCH-2		Vendor		

Sorting templates within a Job Queue Batch

Sorting when processing lines is: "Batch Code", "Sorting No.", "Template Sequence No.", "Template Code". The value "Template Sequence No." comes from the Data Template and cannot be modified here.

When entering "Sorting No." on the lines you can overrule the default sorting controlled by "Template Sequence No. and "Template Code". Then "Sorting No." is controlling the rank of templates within the batch.

Codeunits for Job Queue Batches

There is one codeunit for each step of the synchronization process. These codeunits are requiring a template filter set in the Job Queue Entry which is meant to start the process.

Codeunit <u>6208221</u> "GM Batch Create Subs. Log PROF"	Create Subscriber Log (Master)
Codeunit <u>6208222</u> "GM Batch Send Subs. Log PROF"	Send Subscriber Log (Master)
Codeunit <u>6208223</u> "GM Batch Update Rec. Data PROF"	Update Record Data (Subscriber)
Codeunit <u>6208224</u> "GM Batch Synch. Company PROF"	Synchronize Data (Subscriber)
Codeunit <u>6208225</u> "GM Batch Update Status PROF"	Update Status on Subscriber Log (Master)
Codeunit <u>6208226</u> "GM Batch Create And Send PROF"	Create Subscriber Log and Send Subscriber Log (Master) (6208221 + 6208222)
Codeunit <u>6208227</u> "GM Batch Update And Sync PROF"	Update Record Data and Synchronize Data (Subscriber) (6208223 + 6208224)

Job Queue Entry with Parameter String

On the Job Queue Entry one of the GM Batch codeunits are to be selected, when you want to use Job Queue Batches in Global Master. Enter a filter in field "Parameter String" to choose what batch or batches to process.

Example of filter string: M-BATCH*

Batches starting with M-BATCH will be processed. M-BATCH-1, M-BATCH-2 M-BATCH-3 etc.

Queue Entry Card Worl	^{k Date: 25-01-2024}		✓Saved Ľ Z
PROF	· 0200220 · GI	vi balch Ciea	ale And Send
PROF			
Process Reports	Actions Related Fewer optio	ns	
General			Show less
Object Type to Run	Codeunit 🗸	Maximum No. of Atte	0
Object ID to Run	6208226	Rerun Delay (sec.)	0
Object Caption to Run \cdots	GM Batch Create And Send PR	Last Ready State · · · · · 04	-01-2023 12:04
Description	GM Batch Create And Send PROF	Earliest Start Date/Ti 04	-01-2023 12:04 🛗 …
Parameter String	M-BATCH*	Expiration Date/Time	
Job Queue Category	~	Job Timeout	hours
	ADMIN	Status · · · · · · · · · · Or	Hold

CONTACT INFORMATION

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COPY SUBSCRIBER COMPANY

Adding a new company as a subscriber into a configuration with an already subscribed master would normally result in a large number of synchronization activities into the new subscriber.

Therefore the Copy Subscriber Company function have been created. Copying an existing company into a new company name in the database, is an already known feature in Dynamics NAV and Dynamics 365 Business Central.

The advantage using the "Copy Subscriber Company" function is that the new company will be set up as a subscriber, and in the same step configured as if the data synchronization from the master company already have been performed into the new subscriber company.

This is to avoid unnecessary synchronizations when the new subscriber is activated.

🔏 User Settings 🔏 User Settings	Actions Related Fewer options	泠
General		Show less
Company Type	Copy Subscriber Company $\checkmark \times$	
Master Compa	New Company Name	-
Remove file conter	Advanced >	Show less
Handle Data Files Synchronize Datase	Schedule OK Cancel	
Only Synchronize Ne		
Update older log firs	t Override Delete Restri (

Among the Global Master Setup actions, you will find the "Copy Subscriber Company" feature. Copying a company including Global Master settings to be adjusted, is possible from a subscriber company only.

CONFIGURATION TEMPLATE

code.

A standard feature in Dynamics NAV/365 Business Central is to have configuration templates for setting default values in new records created.

As an example, you could add a Location Code to newly added customers by entering a certain value in the Location Code field.

When entering a "Config. Template Code" in the template header, the code will be synchronized to the subscriber companies, meaning that the usage of this specific Configuration template code is open. Now you can enter fields and initial values for these fields in a configuration template named with exactly this

New entered records (Customers etc.) will then have the initial value inserted when created.

However, is a field present in the configuration template, and also present in the Global Master data template, the data governed by Global Master will be transferred to the subscriber.

02-CU										
New Proc	cess Master Data	Actions Related Fewer options								
Generelt									Show more	
Code · · · · ·		02-CUSTOMER			Validate Record					
Description		Customer			Owned by Master					
Master Partn	er ID · · · · · · · · · · · ·	M1			Sequence No.				0	
Owner Comp	oany Name	M1 Master			Status		Under Development		~	
Туре		Normal Template		~	Released On		02-01-2023 12:46			
Table ID				18	On Hold					
				18 …					~	
		Customer		18 …		2			~	
				18				Description	~	
				18				Description Customer DOMESTIC	~	
Table Caption	n			18			Code↑		~	
Table Caption	n		Validate Field	18 ···	Config. Template Code		Code 1 CUST000001	Customer DOMESTIC	~	
Table Caption	n Manage	Customer			Config. Template Code	• • • • • • • • • • • • • • • • • • • •	Code † CUST000001 CUST000002 CUST000003	Customer DOMESTIC Customer EU		act fro
Table Caption	n Manage Field ID †	Customer Field Caption	Field	Table Name	Config. Template Code	• • • • • • • • • • • • • • • • • • • •	Code † CUST000001 CUST000002	Customer DOMESTIC Customer EU		ect fro
Table Caption	n Manage Field ID † 1	Field Caption	Field	Table Name Customer	Config. Template Code	• • • • • • • • • • • • • • • • • • • •	Code 1 CUST000001 CUST000002 CUST000003 + New	Customer DOMESTIC Customer EU	Sele	ect fro
Table Caption	Manage Field ID † 1 2	Field Caption No. Name	Field	Table Name Customer Customer	Config. Template Code	• • • • • • • • • • • • • • • • • • • •	Code † CUST000001 CUST000002 CUST000003 + New	Customer DOMESTIC Customer EU	Sele	ect fro
Table Caption	Manage Field ID † 1 2 3	Field Caption No. Name Search Name	Field	Table Name Customer Customer Customer	Config. Template Code	• • • • • • • • • • • • • • • • • • • •	Code † CUST000001 CUST000002 CUST000003 + New 0	Customer DOMESTIC Customer EU	Sele	ect fro
Table Caption	Manage Field ID 1 1 2 3 4	Field Caption Field Caption Non Search Name Name Name 2	Field Field	Table Name Customer Customer Customer Customer Customer	Config. Template Code	• • • • • • • • • • • • • • • • • • • •	Code 1 CUST000001 CUST000002 CUST000003 + New 0 0 0	Customer DOMESTIC Customer EU	Sele	ect fro
Table Caption	Nanage Field ID 1 1 2 3 3 4 4 5	Field Caption Field Caption No. Name Search Name Name Address	Field	Table Name Customer Customer Customer Customer Customer	Config. Template Code	• • • • • • • • • • • • • • • • • • • •	Code † CUST000001 CUST000002 CUST000003 + New 0 0 0 0 0	Customer DOMESTIC Customer EU	Sele	ect fro
Table Caption	Manage Field ID † 1 2 3 4 4 5 5 6	Field Caption Field Caption No. Name Search Name Name Address Address 2	Field	Table Name Customer Customer Customer Customer Customer Customer	Config. Template Code	• • • • • • • • • • • • • • • • • • • •	Code 1 CUST000001 CUST000002 CUST000003 + New 0 0 0 0 0 0 0 0 0	Customer DOMESTIC Customer EU	Sele	ect fro

From the Data Template card, you can look up in field "Config. Template Code" to access configuration templates attached to the current table. Select amongst the displayed configuration templates.

MAINTENANCE

Through Role Explorer you can find the two cleanup functions in the Maintenance menu.

Alternatively access to the functions are found directly from the Global Master Role Center. These processing only reports are used for removing data and deleting log entries. Since the file contents in the Subscriber Log entries are using quite an amount of space, this cleanup procedure is useful for freeing space in the database.

Cleanup Subscriber Log

This report is used for deleting the Subscriber Logs.

File contents is the embedded XML document used when transferring GM data between databases. These XML documents can have a rather large size, which does have an impact on the disk space used.

Global Master Activities Management Image: Composition Compositio Composition Composition Compositio Compositio	Maintenance Chenyp SubtryL. Chenyp SubtryL. Chenyp SubtryL. Chenyp SubtryL. Chenyp SubtryL. Subscriber Log Chenyp SubtryL. Subscriber Partner ID C
Image: Second	Maintenance Chenyp SubtryL. Chenyp SubtryL. Chenyp SubtryL. Chenyp SubtryL. Chenyp SubtryL. Subscriber Log Chenyp SubtryL. Subscriber Partner ID C
9 Image: Comp Subtori Cleanup Subtori M Log Entries Filter: Subscriber Log	Cleanup Subori M Filter: Subscriber Log Upg Entries X Data Template Code X Subscriber Partner ID X Subscriber Partn
	Log Entries
× Data Template Code · · · · · · · · · · · · · · · · · · ·	× Subscriber Partner ID
Transactions × Subscriber Partner ID · · · · · · · · · · · · · · · · · ·	
Not Complete Not Complete Alerts Obsolete × Master Partner ID	Alerts Obsolete × Master Partner ID
	× Creation Date ·····
Logs Records	

The report can be started using a filter as in most reports. In addition to this there are two options. The minimum age of the entry entered in the Global Master Setup must be reached before an entry is deleted.

Delete Subscriber Log

Deleting the Subscriber Log completely.

Subscriber logs will be deleted if this field is selected. Option is set by entering a date formula in Global Master Setup field "Delete Entries Older Than".

Cleanup Subscriber Log Entries

This report is used for deleting the Subscriber Log entries.

Insights			
Global Maste Management	er Activities		
Templates	Partners		Cleanup Subscriber Log Entries
5,	3		Filter: Subscriber Log Entry
Transactions	_		× Data Template Code · · · · · · · · · · · · · · · · ·
Not Complete Logs	Not Complete Records	Alerts	0 + Filter
>	- <mark></mark>	>	Advanced >
History			
Subscriber Logs	Record Data	Subscriber Rec Data 494	ScheduleOK Cancel
>	- <mark>-</mark>	>	

The report can be started using a filter as in most reports. In addition to this there are two options. The minimum age of the entry entered in the Global Master Setup must be reached before an entry is deleted. Subscriber logs will be deleted if this field is selected. Option is set by entering a date formula in Global Master Setup field "Delete Entries Older Than".

Cleanup reports managed by Job Queue

The two reports mentioned above, can be managed by the job queue. There are two codeunits designed for this purpose.

Codeunit 6208213 "GM Cleanup Subscriber Log PROF" – Delete Subscriber Log option is set. Codeunit 6208214 "GM Cleanup Sub. Log Entr. PROF"

Running these codeunits the corresponding report will be started with no request form.

PROFILES

The Global Master extension comes with three profiles. These are pre-defined profiles, each with a designated purpose.

Profiles (Roles) Work Date: 25-01-2024										
Profiles (Roles): Custom filtered ~	♀ Search +	New Manage	🕑 Use as default profile	Dopy profile	🚯 Customize pages	Export Profiles	🗅 Import Profiles	More	options	ዸ \ ≣
Profile ID	c	Display Name †		Source T			Role Center ID	Enabled	Use as default profile	Show in Role Explorer
GLOBAL MASTER ADMIN PROF	: 0	Global Master Admini	istrator	Global Mast	er		6208212			
GLOBAL MASTER SUPER PROF	(Global Master Super I	User	Global Mast	er		6208212	1		
GLOBAL MASTER USER PROF	(Global Master User		Global Mast	er		6208212	~		

Profiles are to be added to users in the User Personalization page. Here you see an overview of the three profiles which are included in the Global Master extension.

GLOBAL MASTER USER PROF	This profile has access to tasks for performing the synchronization of data between master and subscriber companies.
GLOBAL MASTER ADMIN PROF	The Administrator profile has access to all necessary functions and set up options for running and managing Global Master.
GLOBAL MASTER SUPER PROF	The super user has access to a few extra features than the admin user. However, these options are for analysis and test purposes only. It is not recommended using the super user for running the system daily.

The identifier PROF used as suffix is the suffix provided for ProFacto A/S. It is required to have this identifier on profiles distributed with ProFactos ISV products.

References to the profiles above might be mentioned without PROF. The "Display Name" is used when selecting a profile.

Global Master Super User

Business Central offers an additional setup using a build in profile.

This profile does use the Global Master Role Center as already described. However, there is a difference.

For more information see the *Global Master SUPER USER* paper which is describing a few hidden features.

By choosing the profile "GLOBAL MASTER SUPER", the Global Master Setup page is modified in a way that gives the user a few undisclosed features.

Showing the group *"Testing/Analysis"*, the super user does have access to some additional options, which normally are activated in by default.

"Special Features" are to be used occasionally and with great caution only.

Work Date: 25-01-2024		Ŀ	+	Ĩ	√ Saved	
Global Master Se	tup					
🔉 User Settings Actions Related	Fewer op	otions				
General						Show less
Company Type · · · · · · Master		~	Show H	story in Role		
Partner ID M1						
Master Company						
Max. No. of Nodes			Master:	Delete Conte		
Remove file contents						
Subscriber Company						Show less
Handle Data Files			Delete E	ntries Older T		
Synchronize Dataset			Delete F	ile Content Ol		
Only Synchronize Net			Subscrib	er: Delete Co		
Update older log first \cdots 💽			Override	e Delete Restri		
Testing/Analysis						
Auto Update Dataset · · · ·			Exhange	Dataset		
Create Data Files · · · · · · ·						
Special Features						
Pass Validation for Ra			Process	XML version		

Testing/Analysis Auto Update dataset	If this field is marked, Record Data are automatically updated when a record is changed in the master company, and if the field is included in a Data Template owned by Master Company.
Create Data Files	In general, this field should always be marked, as this is to allow generating data to Subscribers. If we for some reason want to stop this for a period, the option can be disabled.
Exchange dataset	This setting is required for sending the Subscriber Logs to a subscriber. If we for some reason want to stop this process temporarily, we can uncheck this field.

Important: For making the synchronization work smoothly, these options must be enabled.

Special Features	
Pass Validation for RapidStart	Using RapidStart together with an active Global Master
	installation in not possible, because primary key fields always
	are validated on insert.
	Using this option makes it possible to pass the validation and
	makes it possible to insert data using RapidStart.
	Important: Please deactivate this option right after use.
Process XML version 2.00	Used for Business Central 14 on premises and earlier versions
	only.
	With Global Master version 69 a new XML Document version
	2.10 was introduced.
	This option re-activates interpretation of the old XML data
	when updating and synchronizing in the subscriber company.
	Please refer to important guidance in the paper "Global Master
	– Installation instructions for version 69".
	This option is only available in subscriber companies and should
	be used with great caution only.
	Important: Please deactivate this option right after use.

PERMISSION SETS

The Global Master extension provides three permission sets. These are to be attached to users who must perform tasks in the Global Master system.

Permiss	sion Sets Work Date: 25-01-2024						[] ⊏ ,⊀
,0 s	earch 🕂 New 🐺 Edit List	📋 Delete	Permission	s E Copy Permission Set	Import Permission Sets	Export Permission Sets More options	<i>Ŀ</i> ? ≡ 0
	Permission Set ↑		Name		Type 1	Extension Name 🐨	
\rightarrow	GM ADMIN PROF		: Global	Master Admin	System	Global Master	
	GM INDIRECT PROF		Global	Master Indirect	System	Global Master	
	GM SUPER PROF		Global	Master Super	System	Global Master	
	GM USER PROF		Global	Master User	System	Global Master	

Three permission sets are corresponding to the three user profiles with the three same names.

GLOBAL MASTER ADMIN	The Administrator permissions gives access to all necessary functions and set up options for running and managing Global Master.
GLOBAL MASTER SUPER	The super user has identical rights as the admin user.
	Using the super user profile makes a few extra features visible. These are for test and analysis or for data processing purposes only. Tampering with the extra settings in Global Master Setup is not advisable in a system running smoothly.
GLOBAL MASTER USER	This permission set gives access to tasks for performing the synchronization of data between master and subscriber companies.
The extra permission set GLOBAL MASTER INDIRE	CT is used to extend permission set D365 BASIC.
GLOBAL MASTER INDIRECT	For most users of the Business Central application, Global Master is only visible when giving a user restriction on what data fields the user can change. To process data and verifying if data is managed by Global Master, all users need access for performing background validation.
	The GLOBAL MASTER INDIRECT permission set is granting access to perform this background validation. By adding D365 BASIS to the user's permission sets the permissions defined in GLOBAL MASTER INDIRECT are included.

RECOMMENDATIONS

Templates

Knowing the data to be synchronized using Global Master is very important. References between tables is critical when using field templates and sub templates.

In this chapter a few suggestions how to define templates for certain tables are listed.

Post Code	The "Post Code" table was designed to make entering of post codes and city easier. Therefore, the table has a unusual structure that does not match the use of neither field template nor sub template. Use a template type normal for the "Post Code" table. Consider if it is a good idea setting a filter on the Code field.
Comment Line	The "Comment Line" table has a build in option reference to a number of tables. This is not matching the requirements of the template types field and sub. Use Normal Template for the "Comment Line" table, but a good advice is to have a filter on the "Table Name" field. You might want to have more than one "Comment Line" template with different filters attached to each one.
Extended Text Header	Both the "Extended Text Header" and the "Extended Text Line" cannot be handled by other types than the normal template. Use a filter when setting the template up for synchronization. A matching template for "Extended Text Line" is a must.
Extended Text Line	Both the "Extended Text Header" and the "Extended Text Line" cannot be handled by other types than the normal template. Use a filter when setting the template up for synchronization. A matching template for "Extended Text Header" is a must.

APPENDIXES

Field Templates

Field templates are templates handling data related to from a parent template. This is to ensure that the data which is related to does exist in the subscriber company after synchronization.

The advantage of using a field template as an alternative to a normal template is that the field template does only transfer the data records which are related to from the parent template.

Using a normal template all data in the table are transferred. Unless the template has a record filter.

A field template is identified as a template with type 'Field Template'.

In the following example a simple template setup explains the connection and use of field templates.

'02-CUSTOMER' '01-GENBUSPOSTGRP' Normal template handling table 18 Customer Field template handling table 250 Gen. Business Posting Group

For easy overview the normal template '02-CUSTOMER' used is set with a record filter, to reduce affected data.

C	Pata Template Filters Work Date: 25-01-20	24		√Saved 🖬	2					
		Delete		¢ 7						
	Field ID † Field Ca	ation	Filter							
	→ 1 <u>;</u> No.		01121212							
										_
	Global Master Data Template Work Date:	25-01-2024		0	Ê	+ 🗊			C	^ی ر 1
	02-CUSTOMER									
	New Process Master Data	Actions Related Fewer optic	ns							
	Generelt								Shov	v more
	Code · · · · · · · · · · · · · · · · · · ·	02-CUSTOMER				Validate Record				
	Description	Customer				Owned by Master				
	Master Partner ID	····· M1				Sequence No.				0
	Owner Company Name	M1 Master				Status	Released			
	Туре	Normal Template				Released On	29-12-2022 08:39			
	Table ID · · · · · · · · · · · · · · · · · ·				18	On Hold				
	Table Caption	Customer				Config. Template Code				
	Lines Manage								È	63
	Field ID †	Field Caption		Validate Field	Table Name	Comment	Table Relation	Field Data Template Code	InFormation Field	
	6	Address 2			Customer		0			-
	7	City Contact			Customer Customer		225			
	9	Phone No.			Customer		0			
	15	Territory Code			Customer		286			
	21	Customer Posting Group			Customer		92			
	39	Blocked			Customer		0			
	88	Gen. Bus. Posting Group			Customer		250	01-GENBUSPOSTGRP		

When a field has a table relation it is possible to attach a field template.

Customer table field no. 88 Gen. Bus. Posting Group is referring to table 250 Gen. Business Posting Group. In this case field template '01-GENBUSPOSTGRP' is set up.

Global Master Data Template Work Date: 25-01-2024		0	Ŀ	+ 🔟		^ر ک
01-genbuspostgrp						
New Process Master Data Actions Rel	ated Fewer options					
Generelt						Show more
Code	01-GENBUSPOSTGRP			Validate Record		
Description	Gen. Business Posting Group			Owned by Master		
Master Partner ID	M1			Sequence No.		0
Owner Company Name	M1 Master			Status	Released	
Туре	Field Template			Released On	29-12-2022 08:40	
Table ID			250	On Hold		
Table Caption	Gen. Business Posting Group			Config. Template Code		
Lines Manage						é e
Field ID † Field Capt	on	Validate Field	Table Name	Comment	Table Relation Field Data Template Code	InFormation Field
→ <u>1</u> : Code			Gen. Busin	ess Posting Group	0	
2 Descripti			Gen Rusin	ess Posting Group	0	

The field template is identified by having field Type set to 'Field Template'. This is what makes it possible to look up from the parent template line, where the field has a table relation to the table the field template is handling.

When the two templates have the same subscriber applied, the templates can be released. At the time the templates are released subscriber record data is being updated.

Insights	Options Partner Filter		Show only records not •			
Global Master Activities Management	Data Template Filter		Show Only Not Synch 🕔 🌅			- 1
Templates Partners	🗭 Show Record Data 🛛 🍾 Remove S	Sent Mark 🛛 🗞 Remove Sent N	lark (Current record)		67	
4 1	Subscriber Partner ID ↑ Table ID	Table Caption			ita Sent iteTime	Data Sync. (Su D T (S
· ·	→ \$1 <u>;</u> 250	Gen. Business Posting Group	Code=EXPORT			
Transactions	S1 18	Customer	No.=01121212			
\cap 2						
History	С >					
$\frac{0}{2}$	Set					
History	Supervisionary Subscriber Field Val	ues			ß	
History Subscriber Logs Record Data	Su bb	ues Field Value (KML)	Field Value (Localized)	Data Sent	년 Data Sent At	

Because of the used record filter, only customer '01121212' is being prepared for synchronization. This also meaning that only the Gen. Business Posting Group value 'EXPORT' is set for synchronization.

Was a normal template used to synchronize table 250, you might have a lot of values that is not relevant for the subscriber company. Of cause, if you need value for other purposes please consider if normal template is better in your case.

Sub Templates

Sub templates are templates handling data related to from a parent template. This is to ensure that the data which is related to does exist in the subscriber company after synchronization.

The advantage of using a sub template as an alternative to a normal template is that the sub template does only transfer the data records which are related to from the parent template.

Using a normal template all data in the table are transferred. Unless the template has a record filter.

A sub template is identified as a template with type 'Sub Template'.

In the following example a simple template setup explains the connection and use of field templates.

'02-ITEM' '01-ITEMREF'

C Data Template Filters | Work Date: 25-01-2024

Normal template handling table 27 Item Field template handling table 5777 Item Reference

For easy overview the normal template '02-ITEM' used is set with a record filter, to reduce affected data.

✓ Saved 🖬 🗸

@ 7 ≣

			_		_		_				
Global Master Data	Template Work Da	ate: 25-01-2024	← Sub D	ata Template Link	Work Date: 25	-01-2024			🗸 Saved 🗖 🌽		C,
02-ITEM			,P	Search + New	🐯 Edit List	📋 Delete			12 7 ≡		
New Process	Master Data	Actions Relate		Subordinary Data Te Code↑	emplate		Sub-Table ID	Sub-Table Caption			
Generelt			\rightarrow	01-ITEMREF		÷	5777	Item Reference			Show more
Code · · · · · · · · ·		02									
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Master Partner ID		М									0
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	2	No. 2								0	
	3	Description								0	
	4									0	
	2 3	No. 2								0	
	8	Base Unit o								204	

When a table has a table relation in the primary key it is possible to attach a sub template handling this table. Table 5777 Item Reference is referring to Item in its first field of the primary key, namely field "Item No." In this case a link to sub template '01-ITEMREF' is set up.

New Process	Master Data Act	ions Related Fewer options						
		into ficializar reneropitono						
Generelt								Show more
Code · · · · · · · ·		01-ITEMREF			Validate Record			
Description · · · · ·		Item Reference			Owned by Master			
Master Partner ID		M1			Sequence No.			(
Owner Company Na	ame · · · · · · · · · · · · · · · ·	M1 Master			Status	Released		
Туре		Sub Template			Released On	29-12-2022 10:26		
Table ID · · · · · ·				5777	On Hold			
Table Caption		Item Reference			Config. Template Code			
Lines Ma	anage							é E
	Field ID 1	Field Caption	Validate Field	Table Nar	ne Comment	Table Relation	Field Data Template Code	InFormation Field
\rightarrow	1 :	Item No.	1	Item Re	erence	27		
	2	Variant Code	1	Item Re	erence	5401		
	3	Unit of Measure	×	Item Re	erence	5404		
	4	Reference Type	×	Item Re	erence	0		
	5	Reference Type No.	v.	Item Re	erence	0		
	6	Reference No.	1	Item Re	erence	0		

The sub template is identified by having field Type set to 'Sub Template'. This is what makes it possible to attach the template from the parent template defining a sub template link.

When the two templates have the same subscriber applied, the templates can be released. At the time the templates are released subscriber record data is being updated.

Job Queue Entries Job Queue Batches Actions > Setup Master Company Insights Global Master Activities Management Emplates Partners Side of the setup Side of the setup State Side of the setup Transactions Nacomplete Nacomplete Actions Show Noly Not Synch Show No Noly Not Synch Show No No Noly Not Synch Show No Show No
Actions > Setup > Setup > Setup > Master Company Insights Global Master Activities Management Partners 1 > 1 > Tansactions Not Complete. Not Complete.
Audors > Setup > Master Company Insights Data Template Filter Global Master Activities Show Necord Data > Remove Sent Mark (Current record) Management Subscriber Tamplates Subscriber 1 2 51 1 27 Item Reference 1 27 1 27 1 27 1 27 1 27 1 27 1 27 1 27 1 27 1 27 1 27 1 27 1 27 1 27 1 27 1 27 1 27 1 27
Insights Show Record Data Remove Sent Mark The Remove Sent Mark (Current record) Image: The State Sent Sent Sent Sent Sent Sent Sent Se
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51 5777 Item Reference Item No.=1000. Variant Code= Item No.=1000 > > > Item No.=1000 Item No.=1000 Item No.=1000
Transactions Not Complete Ale
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0 3 C
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Field Caption Field Value (VML) Field Value (Localized) Data Sent At History
→ Item No. 1000
Subscriber Logs Record Data Sul Da Variant Code
2 5 5 A Unit of Measure PCS PCS C
C J Reference Type 1 Customer 🗆

Because of the used record filter, only item '1000' is being prepared for synchronization. This also meaning that only the relevant item references values are set for synchronization.