

White Paper: Migration of Partner Programs

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Change Log

Version	Date	Author	Description
1.0	11-Sep-14	Abbasi Sadikot	Template for migration of Partner Programs





Purpose

Description of the data migration procedures which are to be performed by the Cloud for Customer – Partner Channel Management customer in the hosted environment of SAP. It will set premise for and help accelerate your migration project with a focus on upload of data using migration tool.

The data migration from legacy system is a prerequisite and essential in many projects to execute and fulfill functional requirements. This white paper will document with snapshot in what ways data migration for partner programs can be achieved using the migration tool in SAP Cloud for Customer.





Abstract

The Migration Workbench is a tool that supports data migration from the legacy system to SAP Cloud for Customer. Instead of individual tables or field contents, the tool migrates user-defined datasets. The tool comprises the following main functions:

1. Read data (legacy data from spreadsheet tables and/or sequential files)
2. Convert data (from the source into the target format)
3. Import data (to the C4C application database)

You can migrate the following information for partner programs:

- Partner tier level
- Partner program membership details
- Program dimension details

The following are steps for data migration for partners:

1. Download the migration template
2. Fill the migration template
3. Upload the template in migration tool
4. Verify results in simulation
5. Complete the data migration
6. Verify results



Pre-Requisites

- You have finished *Migration of Partners*
- You have finished detailed scope selection and *Fine tuning* within BC
- You have setup/migrated *Products*
- You have completed data migration assessment
- You have selected migration objects and the upload method (manually-tool supported)
- You have created the following data in the system:
 - Partner – types, tier-level codes, programs and number ranges manually in the *Fine-Tune* phase of the *Activity List*.

Define codes for partner programs
Define tier-level codes for partner programs
Define codes for partner types
Define number ranges for partner programs

Note

1. These settings are normally performed by a key user. If you do not have the required authorization, contact your administrator.



Procedure

1. FILL THE MIGRATION TEMPLATE FOR TOOL-SUPPORTED MIGRATION

To create a valid source file, enter your legacy data in the migration template for partners. You can download the migration template using:

- (i) The *Prepare for Data Migration* activity in the *Prepare* phase, or using the *Perform Data Extraction* activity in the *Fine-Tune* phase of the activity list.

The screenshot shows the 'PREPARE FOR DATA MIGRATION' interface. On the left, there is a list of activities: 'Understand overall migration process', 'Prepare for data migration in a first implementation', 'Prepare for data migration in a change project', 'Download migration templates' (highlighted with a red box), and 'Create a project schedule for data migration'. On the right, the 'Download Migration Templates' panel is open, showing a table of migration objects with 'Download' buttons. The 'Partner Programs' row is highlighted with a red box.

Migration Object	Action
Funds Management Data	Download
Leads	Download
Letter Activities	Download
Loyalty Management Data	Download
Material Valuation Data	Download
Open Sales Orders	Download
Opportunities	Download
Partner Programs	Download
Partners	Download
Phone Call Activities	Download
Projects	Download
Purchase Orders	Download
Purchase Orders History	Download
Purchasing Contracts	Download
Sales Leads	Download

- (ii) From the migration tool.

The screenshot shows the 'Migrate Partner Programs' migration tool interface. It includes a 'Close' button, instructions for uploading and executing migration, and a 'Source Files' table. A context menu is open over the 'Source Files' table, with 'Download Migration Template' highlighted in blue.

Source Files

	Migr... Status	File Name	Description	Migration Mode	Part... Total	Partner Programs Imported	Link To Import Log
No Records Found							



For detailed information on how to enter legacy data into migration templates, see the [Introduction](#) sheet, the [Documentation](#) sheet and the [Field List](#) sheet of the template.



Note the following directions when filling the sheets of the migration template:

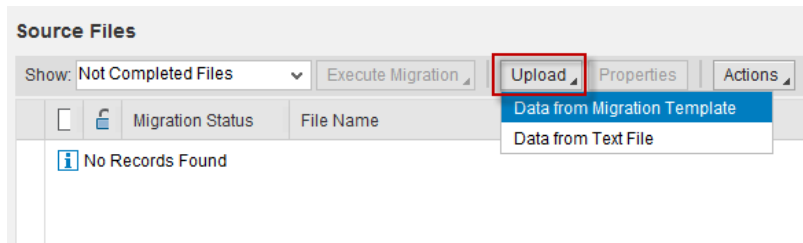
- Make sure you are using the latest migration template
- Enter Partner IDs which already exists in system. You may also use them from the Migration of Partners template that was used to migration partners.
- On the [Contact Functions](#) sheet, the contact partner ID is same as the employee ID in the [Contacts](#) sheet in the partners' migration template. If the employee ID was not entered on the partners migration template and generated automatically during migration. Then enter that employee ID as the contact partner ID.
- On the [Dimensions](#) sheet, enter the product ID which exists in system
- During migration of partner programs, the system checks whether the partners with respective IDs already exist.
- On the [Dimensions](#) sheet, the start date and end date indicates the validity period of the product dimension for respective membership profile.
- There is 1:1 relation between the key combination of partner ID and membership ID on the [Membership Profiles](#) and [Dimensions](#) sheets.



2. MIGRATE DATA USING THE MIGRATION TOOL

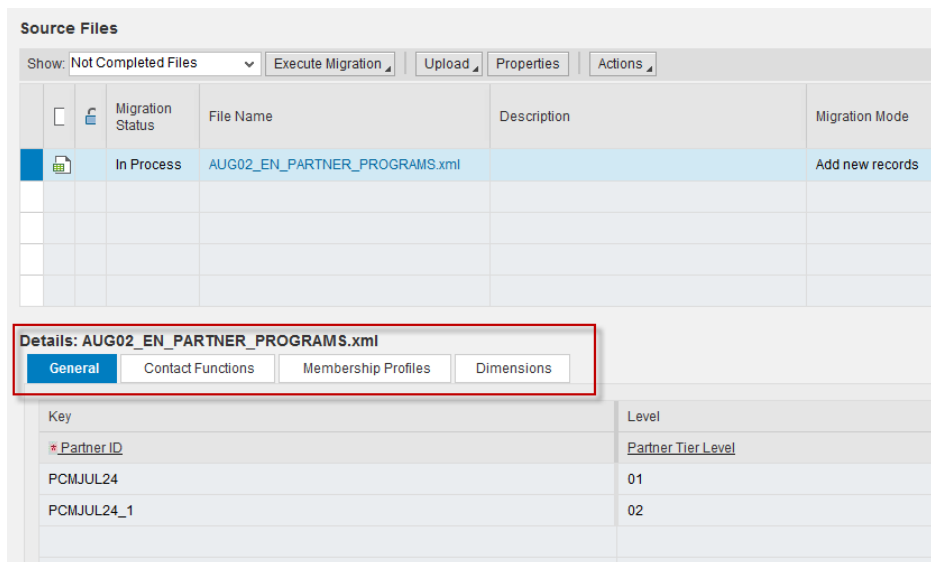
Process your source file with legacy data as follows:

1. Make sure you have created a valid source file using an up-to-date migration template filled with legacy data.
2. Go to the **Business Configuration > Implementation Projects** view. Select your implementation project and click **Open Activity List**. Select the **Integrate and Extend** phase, then click the activity **Migration of Partner Programs**.
3. Carry out the work steps in the migration tool.
 - i. Upload



- ii. Verify

You can review the uploaded data file in the migration tool. Click on each tab to review data.



Note

1. To reach required data quality multiple import runs (iterations) are necessary.
2. Each iteration cycle consists of run import – verify data – reload snapshot – correct error.



You can also perform different actions on the data before you begin migration steps.

Source Files

Show: Not Completed Files | Execute Migration | Upload | Properties | Actions

Migration Status	File Name	Description
In Process	AUG02_EN_PARTNER_PROGRAMS.xml	

Details: AUG02_EN_PARTNER_PROGRAMS.xml

General | Contact Functions | Membership Profiles | Dimensions

Key	Level
* Partner ID	Partner Tier Level
PCM JUL24	01
PCM JUL24_1	02

For example, you can perform operations like add row, copy, delete, etc. using the 'Edit' option.

Edit Source File: AUG02_EN_PARTNER_PROGRAMS.xml

Migration Object: Partner Programs | Migration Status: In Process

Save and Close | Save | Close | Upload Data from Text File

General | Contact Functions | Membership Profiles | Dimensions

Show: Standard View | Add Row | Copy | Delete | Mass Change

iii. Execute

Proceed with the migration steps. Click on 'Next' at successful completion of each step.

Predecessors

This migration object has dependencies to other objects: Partners.

Source Files

Show: Not Completed Files | Execute Migration | Upload | Properties | Actions

Execute Migration Step by Step | Execute Data Import Immediately

Migration Status	File Name	Description
In Process	AUG02_EN_PARTNER_PROGRAMS.xml	

Migration Object Partners

1 Validate File | 2 Convert Values | 3 Simulate Import | 4 Execute Import | 5 Confirmation

< Previous | Next > | Finish | Cancel | Repeat Validation



Make sure you review the 'Log' carefully at completion of each step.

Log	
Show: All Messages	Export
Message	Action
▼ Summary	
▼ Statistics	
No errors detected during file validation	

In the 'Convert Values' step, make sure the status column is 'Completed' for each entry in the worklist. This is because some of the source value you entered might not be compatible with target value in the system.

Process all tasks in the worklist.				
Worklist				
Show: All Tasks	Process Task			
Progress	Status	Task	Open Values	
	Completed	Edit Value Conversion for Partner Type	0	
	Completed	Edit Value Conversion for Partner Type Status Code	0	
	Completed	Edit Value Conversion for Partner Type	0	
	Completed	Edit Value Conversion for Main Contact	0	
	Completed	Edit Value Conversion for Programme Code	0	
	Completed	Edit Value Conversion for Dimension Status	0	
	Completed	Edit Value Conversion for Partner Tier Level	0	

iv. Correct Errors

Review the log carefully in the 'Simulate Import' step. You can edit the source record directly and correct the error by navigating to right tab and column.



v. Execute Import and Finish

Check the log after import is executed. You will see the count of (i)records imported successfully and (ii)records which are not imported due to errors.

Click on the 'Finish' button. With this the respective data file is moved from status 'In Process' to 'Completed'.

4. Migrated Files

After you have imported the source file successfully you can see your file on the home page of migration tool under 'Completed Files'.

Click on [Show Import Log](#) to see the log details anytime.

Migration Status	File Name	Description	Migration Mode	Partner Programs Total	Partner Programs Imported	Actions
Completed	JUL24EN_CHNL_PARTNER_PROFILE.xml		Add new records	2	2	Link To Import Log Show Import Log
Completed	Jul22_EN_CHNL_PARTNER_PROFILE.xml		Add new records	2	2	Show Import Log

5. Check import log

You can download the erroneous records from the log, correct it and upload again with a new file.



Follow-On Activities

You can verify migrated records in the Partners work center. Compare the data in your legacy system with the data that has been migrated to SAP Cloud for Customer. Check a certain number of records to ensure that the values in both systems match.

In the Partners work center, you can see the migrated data under Contacts (Contact Function assignment), Partner Programs and Partner Product Dimensions.





Results

You can see all the migrated partner programs in the [Partners](#) work center.

CUSTOMER SERVICE , FEED BUSINESS ANALYTICS , APPLICATION AND USER MANAGEMENT , SERVICE ENTITLEMENTS , ACTIVITY PLANNER , **PARTNERS** . < >

PARTNERS: All (51) New

Find...

Partner ID	Name	Status	Country	City	State	Contact	MyProcessAddress
PCM JUL244	HI JUL24111 TEST	Active				HI 244 JUL 24 TEST 1	
PCMAUG02	HI JUL2411 TEST	Active	India	BANGALORE	Karnataka	HI JUL24 TEST1	No
1003825	Customer	In Preparation				Hans Mueller	No
1003810	Partner from UI	Active	United Kingdom	london	Antrim	hi cont	No
1003813	SAP Partner 2907	Active	India	Bangalore	Karnataka	Partner Contact 2907	No
1003812	Robert Bosch India	Active	India	Bangalore	Karnataka	Krishna Mukund	No
1003785	Goregoan Systems	Active	India	Bangalore	Karnataka	Dheeraj goenka	No
1003797	Bangalore Corporates	Active	India	Bangalore	Karnataka	Ravi Contact	No
PCM JUL24_1	HELLO JUL24 TESTING	Active	United States	FREMONT	California	HELLO JUL 24 TESTING	No
PCM JUL24	HI JUL24 TEST	Active	India	BANGALORE	Karnataka	HI JUL24 TEST	No
1003637	India Inc	Active	India	Bangalore	Karnataka		No
PCM JUL23	PCM JUL23 L	Active				JUL23 L	
PCM JUL22_1	Reliance Greens	Active	United States	Fremont	California	Dhirubhai Ambani	No
PCM JUL22	Phoenix Marketcity	Active	India	Bangalore	Karnataka	Abbasi Sadkot	No
1003760	PRN PARTNER	Active	India	Bangalore	Karnataka		No
1003757	Migration Context	Active	India	Bangalore	Karnataka	Rakesh Contact	No
1003741	Pavitraran Partner Company	Active	India	Bangalore	Karnataka		No
PCM0001	PCM Test1 Partner1	Active	India	Bangalore	Karnataka	Dr. PCM1_1 Contact_1	No
1003730	DON	Active	India	Bangalore	Karnataka		Yes
1003636	India Inc	Active	India	Bangalore	Karnataka	Shpra Sinha	No
PCM0006	OPOPOP	Active				ABAB ABAB	

FEED EMPLOYEES PRODUCTS CALENDAR LIVE ACTIVITY TAGS SHELF

Overview tab:

PARTNER PROGRAMS

Partner Program	Membership ID	Partner Type	Status	Agreement Start Date	Agreement End Date
Channel Program	M236	Distributor	Operational	17.07.2014	31.07.2015
Channel Program	M360	Retailer	Rejected	07.01.2014	31.12.2015

PARTNER PRODUCT DIMENSIONS

Membership ID	Partner Type	Dimension Status Code	Product	Start Date	End Date
M360	Retailer	Requested	HE-CRM-SW-0...	17.07.2014	17.08.2015
M360	Retailer	Requested	10000002	09.07.2014	31.07.2014
M236	Distributor	Authorized	HE-CRM-HW-001	17.07.2014	17.08.2014
M236	Distributor	Authorized	HE-SW-002	17.07.2014	18.07.2014



Details tab:

OVERVIEW FEED RELATIONSHIPS ADDRESSES CONTACTS **PARTNER PROGRAMS** LEADS SALES LEADS OPPORTUNITIES

PARTNER PROGRAMS

New

Partner Program	Membership ID	Partner Type	Status	Agreement Start Date	Agreement End Date	Action
Channel Program	M236	Distributor	Operational	17.07.2014	31.07.2015	
Channel Program	M360	Retailer	Rejected	07.01.2014	31.12.2015	

PARTNER PRODUCT DIMENSIONS

New

Dimension Status	Product	Start Date	End Date	Action
Authorized	HE-SW-002 - HE Test Integration Software	17.07.2014	18.07.2014	
Authorized	HE-CRM-HW-001 - HE Test CRM Hardware 001	17.07.2014	17.08.2014	

Assignment of partner contact to partner function:

OVERVIEW FEED RELATIONSHIPS ADDRESSES **CONTACTS** PARTNER PROGRAMS LEADS SALES LEADS OPPORTUNITIES

CONTACTS

New

Name	Phone	Fax	Mobile	E-Mail	Func...	Depa...	Main	...
HELLO 2 JUL 24 TESTING 2							<input type="checkbox"/>	
HELLO JUL 24 TESTING							<input checked="" type="checkbox"/>	

ASSIGN PARTNER TYPE TO CONTACT FUNCTION

Assign

Name	Partner Type	Start Date	End Date	Action
HELLO JUL 24 TESTING	Distributor	01.01.2011	01.01.2019	
HELLO 2 JUL 24 TESTING 2	Retailer	01.01.2011	01.01.2019	





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