

White Paper: Migration of Partners

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Change Log

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





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 partners and partner contacts 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 partners and partner contacts:

- General characteristics and addresses
- Communication data like collaboration data
- Contacts, including private addresses
- Directly responsible employees
- Notes and attachments

The following are steps for data migration for partners and partner contacts:

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

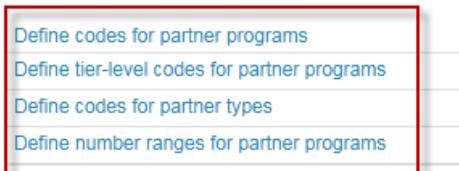
- You have finished detailed scope selection and *Fine tuning* within BC
- You have completed data migration assessment
- You have setup Organization structure, Job definition, employees, etc.
- You have selected migration objects and the upload method (manually-tool supported)
- You have created the following data in the system:

- *Number Ranges for Business Partner* in the *Fine-Tune* phase of the *Activity List*.



Number Ranges for Business Partners
You can specify number ranges for business partners. The nu
[Define Number Ranges for Business Partners](#)

- 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](#)

EXTENSION FIELDS

If you plan to use extension fields in the work center views that are associated with this migration object, we recommend that you create the extension fields **before** you migrate any data for this object. Once you finish creating the extension fields, you can download the updated migration templates using the *Prepare for Data Migration* activity in the *Prepare* phase, or using the *Perform Data Extraction* activity.

Once you finish creating the extension fields, you can download the updated migration templates using 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 extension fields are displayed as new columns at the end of the relevant sheets.

Note

1. These settings are normally performed by a key user. If you do not have the required authorization, contact your administrator.
2. If you created an extension field in a work center view that is associated with multiple migration objects, this field is not necessarily included in every migration template.
3. When you upload a source file to the migration tool, the migration tool automatically checks whether additional extension fields have been added to the corresponding work center views. If so, you can add them to your source file and decide whether you want to enter any legacy data in the new columns.



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.

PREPARE FOR DATA MIGRATION

Owner: Business Option: Built-in Services and Support: Business

Close

You must plan and prepare the migration project.

Understand overall migration process

Prepare for data migration in a first implementation

Prepare for data migration in a change project

Download migration templates

Create a project schedule for data migration

Download Migration Templates

Close

Migration templates are used to collect and prepare your legacy data for migration to your SAP cloud solution. There is a unique migration template for each migration activity. To download single templates, click "Download". To download several templates, select the templates and click "Download to ZIP File". Afterwards, carefully read the filling instructions for the migration template.

Download to ZIP File

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	Download
Sales Leads	Download

Do you want to open or save **EN_Partners.xml** from ...?

Open Save Cancel

- (ii) From the migration tool.

Migrate Partners

Close

Help

You Can Also

- Show Migration Object Documentation
- Export Value Conversion to File
- Import Value Conversion from File
- Adapt Migration Object
- Adjust Settings for Parallel Processing
- Download Migration Template**
- Download CSV-Migration-Template

1. Upload the source files for this migration object.
2. Execute migration for each source file separately.
To resume migration for source files with status 'In Process' choose 'Execute Migration'

Predecessors
No predecessors found.

Source Files

Show: Not Completed Files Execute Migration Upload Properties Actions

File Name	Description	Migratio...	P... T...	Partn... Impo...	Link To Im... 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
- Partner IDs can be numeric or alphanumeric. If alphanumeric, use uppercase letters only.
- On the [Attachments](#) sheet you can define server or internet links to attachments. But you cannot upload attachments to the SAP solution using the migration tool.
- During migration of partners, the system checks whether the IDs already exist. Duplicate IDs are listed in the migration log file. Check the log file and assign new IDs if necessary.
- On the [Addresses](#) sheet, enter postal codes in a country-specific format.
- On the [Contacts](#) sheet, the combination of partner ID, employee ID, first name, and last name must be unique. For example, you cannot enter the same combination to define different addresses for the same contact.
- On the [Contacts — Personal Addresses](#) sheet, you can define the private contact data of a contact.
- For the employee ID, the system automatically assigns new IDs for all migrated contacts. New employee IDs will be generated based on the number range settings you defined using the [General Business Partners](#) activity in the [Fine-Tune](#) phase of the activity list. The new numbers will be taken from the numeric internal number range.
- System creates partner contact as an external employee (service agent) in the system.

Note

1. If you use extension fields in the work center views that are associated with this migration object, make sure that all extensions fields have been implemented before you download the migration template. Otherwise, the extensions fields will not be available in the migration template.

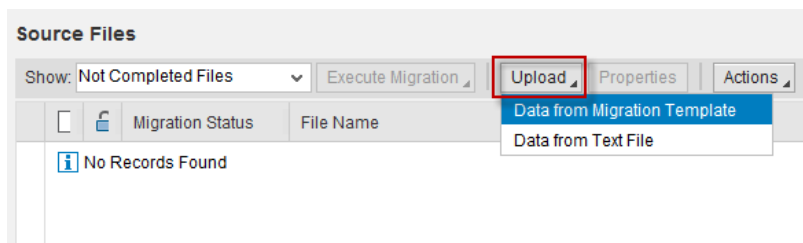
2. Partner status by default is set as 'Active'.



2. MIGRATE DATA USING THE MIGRATION TOOL

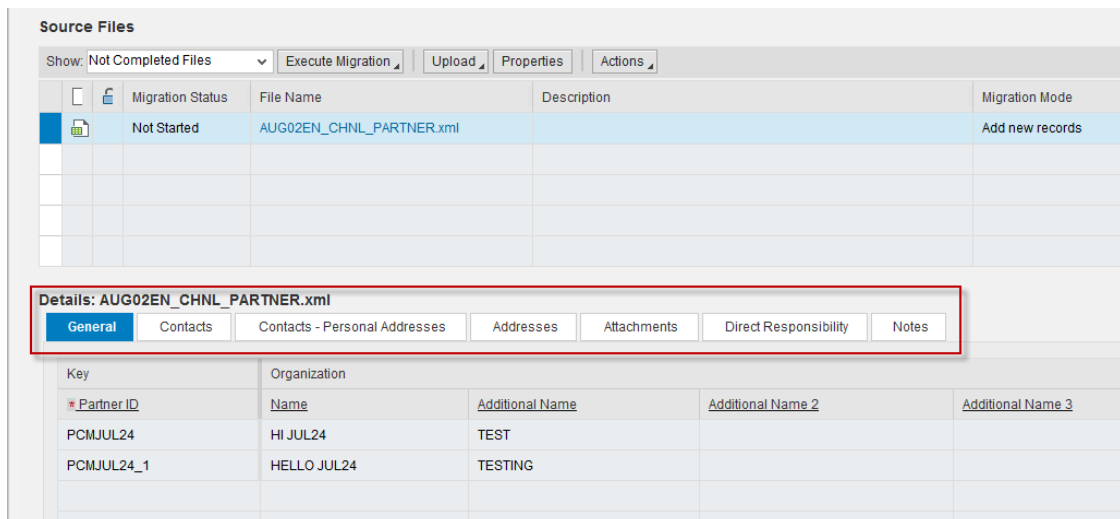
Process your source file with legacy data as follows:

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 Partners**.
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	Migration Mode
Not Started	AUG02EN_CHNL_PARTNER.xml		Add new records

Details: AUG02EN_CHNL_PARTNER.xml

General | Contacts | Contacts - Personal Addresses | Addresses | Attachments | Direct Responsibility | Notes

Key	Organization	Additional Name	Additional Name 2	Additional Name 3
* Partner ID	Name			
PCMJUL24	HI JUL24	TEST		
PCMJUL24_1	HELLO JUL24	TESTING		

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

Edit Source File: AUG02EN_CHNL_PARTNER.xml

Migration Object: Partners | Migration Status: In Process

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

General | Contacts | Contacts - Personal Addresses | Addresses | Attachments | Direct Responsibility | Notes

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.

Source Files

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

Migration Status	File Name	Description
Not Started	AUG02EN_CHNL_PARTNER.xml	

Migration Object Partners

1 | 2 | 3 | 4 | 5

Validate File | Convert Values | Simulate Import | Execute Import | Confirmation

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



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

Log

Show: All Messages

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

Progress	Status	Task	Open Values
	Completed	Edit Value Conversion for Country	0
	Completed	Edit Value Conversion for Legal Competence Indicator	0
	Completed	Edit Value Conversion for Default Contact	0
	Completed	Edit Value Conversion for Region	0

For example, the country code.

Edit Value Conversion for Country

Value Conversion for Country

For all values with a red status icon enter a new target value or assign a target value from the input help. Confirm or change target values with a yellow status icon.

Show: All

Source Value		Target Value		
Status	Country	Country	Target Description	Confirmation
	INDIA	IN	India	<input type="button" value="Confirm Value"/>
	US	US	United States	<input type="button" value="Confirm Value"/>

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.



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

< Previous Next > Finish Cancel Repeat Simulation

In this process step the import of your source data is simulated. Review the log details and correct inconsistent values found in the source file.

Source File
 Name: AUG02EN_CHNL_PARTNER.xml
 Description:
 Partners Total: 2
 Partners With Errors: 2
 Simulation Submitted On: 02.08.2014 13:34

Log
 Show: All Messages Export

Message	Action
▼ Summary	
▼ Statistics	
Errors detected during import simulation	
▼ Import Simulation (0002 source data records with errors, 0000 source data records with warnings)	
▼ Error detected in source record with key value 'PCMJUL24'	
Goto Correction	Edit Source Record
Business partner PCMJUL24 already exists	
▼ Error detected in source record with key value 'PCMJUL24_1'	
Goto Correction	Edit Source Record
Business partner PCMJUL24_1 already exists	

v. Execute Import and Finish


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

< Previous Next > Finish Cancel Import File

The import uploads the source data into the target system. Not imp

Source File
 Name: AUG02EN_CHNL_PARTNER.xml
 Description:
 Partners Total: 0
 Partners Imported: 0
 Partners With Errors: 0
 Import Submitted On:

Import File □ ×

 You are going to import your data into the system. Imported records can be used in business processes later on. Defective records will be copied to a separate data file for later processing. Deletion of imported data is not possible.

I want to import the source data now.

[Yes](#) [No](#) [Cancel](#)

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'.



The screenshot shows the migration tool interface at step 4, "Execute Import". The progress bar at the top indicates the following steps: 1. Validate File, 2. Convert Values, 3. Simulate Import, 4. Execute Import (highlighted), and 5. Confirmation. Below the progress bar, there are navigation buttons: "< Previous", "Next >", "Finish" (highlighted with a red box), "Cancel", and "Import File".

The main content area displays the following information:

- The import uploads the source data into the target system. Not imported records will be copied to a separate file automatically.**
- Source File**
 - Name: AUG02EN_CHNL_PARTNER.xml
 - Description:
 - Partners Total: 1
 - Partners Imported: 1 [Display Imported Records](#)
 - Partners With Errors: 0
 - Import Submitted On: 02.08.2014 13:56
- Log**
 - Show: All Messages (dropdown) | Export
 - Message table:

Message	Action
Summary	
Statistics	
No errors detected during data import	

In the example below, one record was successfully migrated and second record was not migrated due to error. Check Step 5 below for how to upload erroneous records.

The screenshot shows the migration tool interface at step 4, "Execute Import". The progress bar at the top indicates the following steps: 1. Validate File, 2. Convert Values, 3. Simulate Import, 4. Execute Import (highlighted), and 5. Confirmation. Below the progress bar, there are navigation buttons: "< Previous", "Next >", "Finish", "Cancel", and "Import File".

The main content area displays the following information:

- The import uploads the source data into the target system. Not imported records will be copied to a separate file automatically.**
- Source File**
 - Name: AUG01EN_CHNL_PARTNER.xml
 - Description:
 - Partners Total: 2
 - Partners Imported: 1 [Display Imported Records](#)
 - Partners With Errors: 1 [Display Not Imported Records](#)
 - Import Submitted On: 02.08.2014 14:50

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.

The screenshot shows the "Source Files" section of the migration tool. The "Show" dropdown is set to "Completed Files" (highlighted with a red box). Below the dropdown are buttons for "Execute Migration", "Upload", "Properties", and "Actions".

Migration Status	File Name	Description	Migration Mode	Partners Total	Partners Imported	Link To Import Log
Completed	AUG02EN_CHNL_PARTNER.xml		Add new records	1	1	Show Import Log



5. Check import log

Import Log

Close

General Information

Migration Object: Partners

Source File:

Partners Total: 1

Partners Imported: 1 [Display Imported Records](#) [Download](#)

Partners With Errors: 0

Import Submitted On: 02.08.2014 13:56

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

Import Log

Close

General Information

Migration Object: Partners

Source File:

Partners Total: 2

Partners Imported: 1 [Display Imported Records](#) [Download](#)

Partners With Errors: 1 [Display Not Imported Records](#) [Download](#)

Import Submitted On: 02.08.2014 14:50

Log

Show:

Message	Details
▼ Summary	
▼ Statistics	
Errors detected during data import	
▼ Data Import (0001 source data records with errors, 0000 source data records with warnings)	
▼ Error detected in source record with key value 'PCMJUL24_1'	
Goto Correction	
Business partner PCMJUL24_1 already exists	



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.

After migration of partners, you can use the Partner Programs activity to migrate the partner programs.





Results

You can see all the migrated partners and their contacts 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	Pavithran 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	Shipra Sinha	No
PCM0006	OPOPOP	Active				ABAB ABAB	

FEED EMPLOYEES PRODUCTS CALENDAR LIVE ACTIVITY TAGS SHELF





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