Legacy Migration with SAP Business One using Data Transfer Workbench

Easily import master and transaction data from your legacy systems into SAP Business One™.

Keep your data live and consistent when switching from your legacy system to SAP Business One.

Find out how Data Transfer Workbench for SAP Business One will assist you during your implementation projects by easily migrating your master and transactional data into the SAP Business One application.

When making the change from legacy systems to new business management solutions, such as SAP Business One, organizations are faced with the challenge of having to keep historic data online for audit and research purposes as well as for ongoing day-to-day business activities. The best practice for keeping historic data online is legacy data migration which allows for a seamless transition from legacy systems to SAP Business One.

Data Transfer Workbench for SAP Business One is a migration tool that enables you to easily transfer business and system data from your legacy system into SAP Business One. Data Transfer Workbench incorporates data from all core business areas, such as accounting, sales, purchasing, and logistics. Furthermore, it transfers master data, such as business partner and item records, as well as transaction data, such as orders, invoices, and balances, as both need to be available in the new SAP Business One system.

In addition to enabling configuration and execution of initial data imports, Data Transfer Workbench helps you with all other data migration needs, including the update of SAP Business One on a regular basis with data from another system, or the migration of large amounts of data, which can be transferred as files, rather than having to be typed manually into SAP Business One. All data transfers can be executed manually on an ad-hoc basis or scheduled to run at certain times or intervals.

Data Transfer Workbench in SAP Business One

Setup and Configuration	Transfer and Import	Integration
Use predefined templates and data files for storage and mapping	Extract and manage data in Microsoft Excel™ sheets	Transfer general, master, and transaction data
Easily create custom importing interfaces	Use wizard interface for data transfer	Apply SAP Business One business rules to validate data integrity
Test setup with transfer simulations	Plan transfers with Task Schedule Runs	Perform direct data transfer from ODBC databases

Figure 1: Features of Data Transfer Workbench in SAP Business One

Data Transfer Workbench (DTW)

Data Transfer Workbench offers an easy-to-use integration with Microsoft Excel™ which allows you to extract data from your legacy system into Excel spreadsheet templates and subsequently import them into SAP Business One.

Data Transfer Workbench is built on the Data Interface API, which is part of the SAP Business One *Software Development Kit (SDK)*. This guarantees data consistency during the data load and the enforcement of the same business rules that are part of standard SAP Business One.

The *Data Transfer Workbench Wizard* guides you through the data migration process and integrates all relevant steps, such as data extraction, mapping, and import. During the extraction step, the necessary data is extracted from the legacy system. Subsequently, the data is converted into the format required by SAP Business One and mapped to corresponding data structures and fields. Finally, during the import step, the data is imported into SAP Business One.
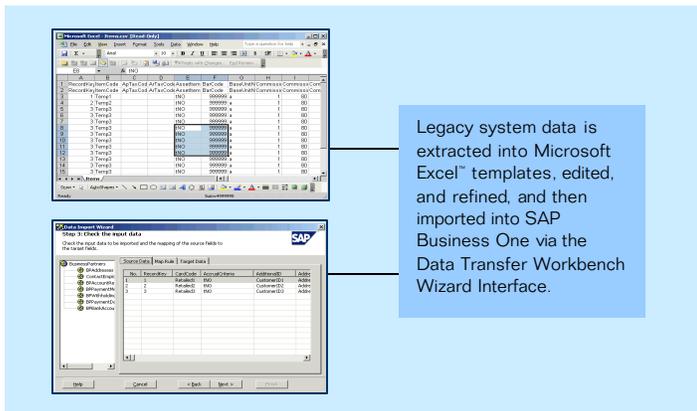
Data Transfer Workbench simulation features allow you to run import simulations to ensure consistent data migration according to SAP Business One business rules and data mappings.

Setup and Configuration

SAP provides a variety of predefined file templates and sample data files to simplify the preparation of data for transfer. If special fields or tables need to be migrated, Data Transfer Workbench allows

you to maintain a custom importing interface and to generate individualized Microsoft Excel™ templates. The *Maintain Interface Wizard* provides you with a graphical user interface for creating custom templates and fields.

Both predefined and custom data files and templates can be tested using the simulation engine in Data Transfer Workbench. You can also run a simulation importing to verify data integrity.

Legacy system data is extracted into Microsoft Excel™ templates, edited, and refined, and then imported into SAP Business One via the Data Transfer Workbench Wizard Interface.

Figure 2: Microsoft Excel™ templates in Data Transfer Workbench

SAP Business One uses business objects to represent sets of tables in the database. Business objects provide a basis for data mapping and import.
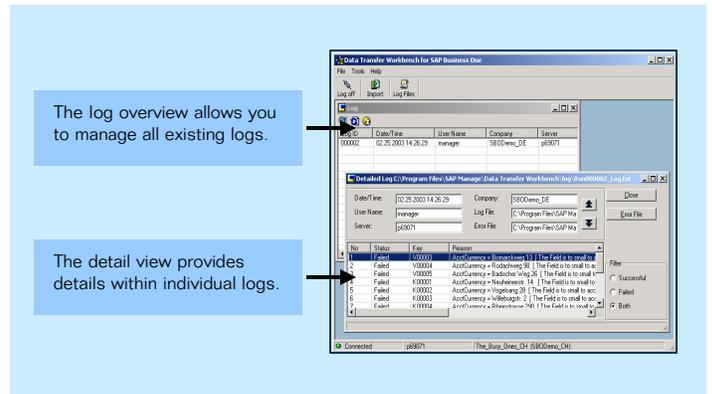
Transfer and Import

Data Transfer Workbench has a number of predefined Microsoft Excel™ templates to assist you in importing data from a file. Templates can be linked together to allow for the update of multiple tables within one import. The Microsoft Excel™ templates delivered with Data Transfer Workbench are based on SAP

Business One database tables and map the legacy data structure to the SAP Business One data structures.

Once all or parts of your data have been extracted, you can modify and refine fields and values, if desired, or change the mapping rules. Save the modified file in order to release it for import. Data Transfer Workbench supports data files in text format that are tab, comma, or semicolon delimited.

Using the *Data Import Wizard*, you can import new data or update existing data as well as upload multiple files for different tables in one step. Before final import, you can manually validate the mapping of the legacy data to the SAP Business One data structure and run the data import in *Test Run* mode. Once data consistency is confirmed, you can perform a complete run and write the legacy data permanently to the SAP Business One database.

The log overview allows you to manage all existing logs.

The detail view provides details within individual logs.

Figure 3: Log Management in Data Transfer Workbench

After import, access import protocols through *Log Management* in Data Transfer Workbench. *Log Management* collects information,

messages, and error messages of upload processes and prepares them for analysis.

Integration

In addition to Microsoft Excel™, the Data Transfer Workbench also has an *ODBC interface*. Using this interface, you can import data directly from an ODBC data source without having to export the data into Excel™ templates first.

Legacy data stored in an ODBC compliant data source can be accessed directly by Data Transfer Workbench and transferred SAP Business One
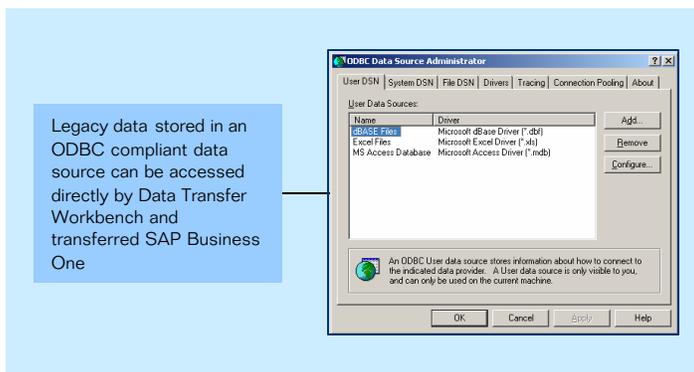
Figure 4: ODBC integration

For example, if you want to transfer legacy data from another MSSQL or Microsoft Access™ database, you can configure Data Transfer Workbench to connect and retrieve data directly from

from the ODBC database, instead of exporting the data into Microsoft Excel™ files.

Data Transfer Workbench applies business rules defined in SAP Business One during the update of the Business One database. Data that is found to be inconsistent with those rules is not imported. A message with error code and description is generated in *Log Management* for subsequent trouble shooting.

Data Transfer Workbench supports the migration of all relevant business and system data. You can transfer master data, such as business partners, items, and chart of accounts, as well as transaction data, such as marketing documents, goods movements, and accounting postings. In addition, general data, such as activities and budgets, can be migrated, allowing for a complete system migration

Data Transfer Workbench is a powerful, yet flexible tool, which effectively and accurately imports and updates your business data in SAP Business One.

To learn more about how Data Transfer Workbench can help define your data migration needs and support the transition from your legacy system to SAP Business One, call your SAP representative or visit us on the Web at **www.sap.com/smb.**

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