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End-to-End Guide for Selective Data Transfer from SAP Solution Manager 7.2 to SAP Cloud ALM

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1 Overview and First Steps

SAP Solution Manager is in mainstream maintenance until the end of 2027. SAP Cloud ALM is the go-to ALM platform for all SAP customers. SAP recommends completing the transition to SAP Cloud ALM before this date.

This guide provides information about and resources for the selective data transfer from SAP Solution Manager to SAP Cloud ALM.

The primary goal of the selective data transfer is to ensure a seamless transition of critical data and processes while setting the foundation for an enhanced application lifecycle management (ALM) in a cloud environment. This process aims to achieve the following:

- Preserve data integrity:

  Ensure that all essential data, including process hierarchies, libraries, process content, is accurately transferred to SAP Cloud ALM. The transfer process leverages external reference names & IDs to maintain the integrity of relationships and dependencies between entities.

- Enable continuity and optimization:

  Facilitate the continued operation of business processes by rebuilding and optimizing them within SAP Cloud ALM. The transferred data serves as the foundation for re-establishing business processes, which can then be refined and enhanced using the advanced capabilities of the new platform.

- Support comprehensive validation:

  Provide a framework for thorough testing and validation of all transferred data and processes. This ensures that the functionality aligns with business requirements and that any issues identified during the transfer are addressed.

- Enhance flexibility and efficiency:

  Leverage the flexibility of SAP Cloud ALM to streamline operations, remove redundancies, and introduce efficiencies. The transition offers an opportunity to adopt new features and capabilities that enhance overall ALM performance.

- Ensure long-term success:

  Establish ongoing monitoring and support mechanisms within SAP Cloud ALM to maintain optimal performance and compliance. The selective data transfer sets the stage for continuous improvement, innovation, and effective management of the application lifecycle in the cloud.

For more information, see Transition to SAP Cloud ALM for Implementation.

1.1 Transition to SAP Cloud ALM

Regarding operations and service functionality, you can already move to SAP Cloud ALM.

However, for SAP Cloud ALM for implementation you can move at your own pace, once the required functionality is ready for you.

For a successful transition to SAP Cloud ALM, it is crucial to ensure your ALM processes can work effectively within the new environment. This verification guarantees, that the core functionalities, such as process management, test management, and documentation, are fully operational and aligned with business requirements.

Recommendation: it is key to ensure the required functional coverage by SAP Cloud ALM before the selective data transfer by use of SAP Readiness Check. For more information, see Preparing the Data Transfer with SAP Readiness Check.

With the selective data transfer, you can transfer specific and relevant data from SAP Solution Manager 7.2 and Focused Build for SAP Solution Manager to SAP Cloud ALM.

This transfer is designed as a **one-time event** and not as an ongoing synchronization of content between the two solutions. You can perform a single data transfer based on a specific solution, branch, and scope.

Note: The selective data transfer only allows for initial uploads of data from SAP Solution Manager to SAP Cloud ALM. Modifying previously uploaded data by another upload is not possible.

The **Selective Data Transfer** app provided in SAP Solution Manager offers reports and functionalities to facilitate the seamless transfer of data to SAP Cloud ALM. For more information, see the Selective Data Transfer Guide for SAP Solution Manager.

The selective data transfer enables you to modify the data during the transfer process. You can combine the redesign of your ALM processes with the retention of important data, ensuring the protection of your investments.

To prepare the transition, SAP additionally provides the following tools:

- SAP Readiness Check, to identify functional requirements and define priorities aligned with project planning. For more information, see Preparing the Data Transfer with SAP Readiness Check.
- The SAP Cloud ALM transition roadmap based on the SAP Activate methodology guides you through the process.
- SAP Best Practice Tools & Methodology for SAP Cloud ALM, to accelerate and simplify the adoption of SAP Cloud ALM for faster time to value, using best-practice business processes. Further Information under End-to-End Overview

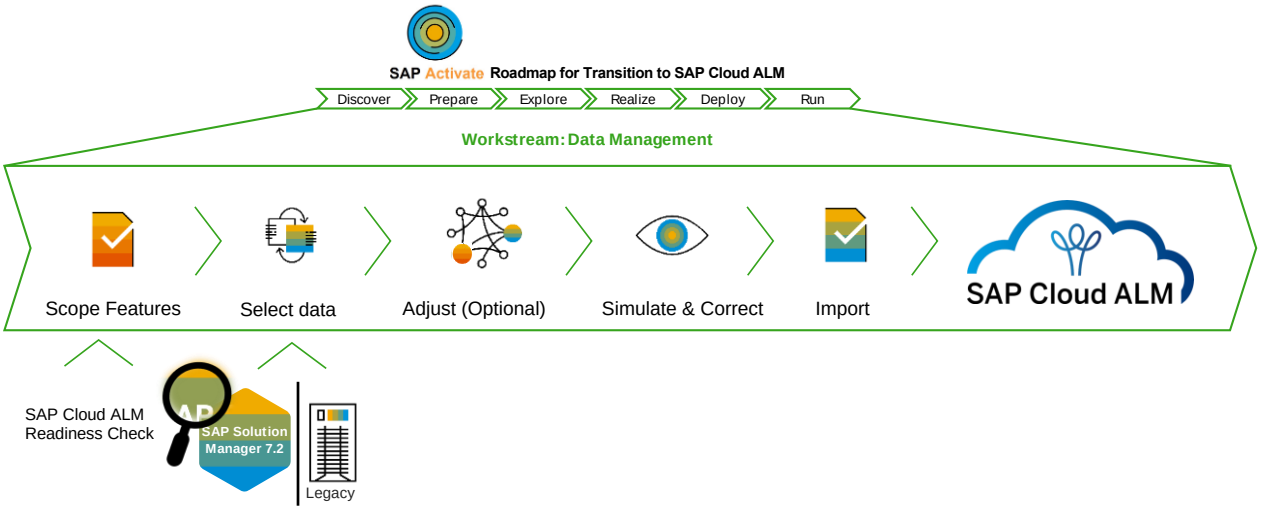


Figure 1: Selective data transfer approach.

The selective data transfer follows a spreadsheet-based approach (XLSX) comparable to the selective data transition that is used for transitioning from SAP ERP Central Component (SAP ECC) and other legacy systems to SAP S/4HANA Cloud. With that, you can tailor the content to specific migration needs, save time, and ensure standardization across datasets.

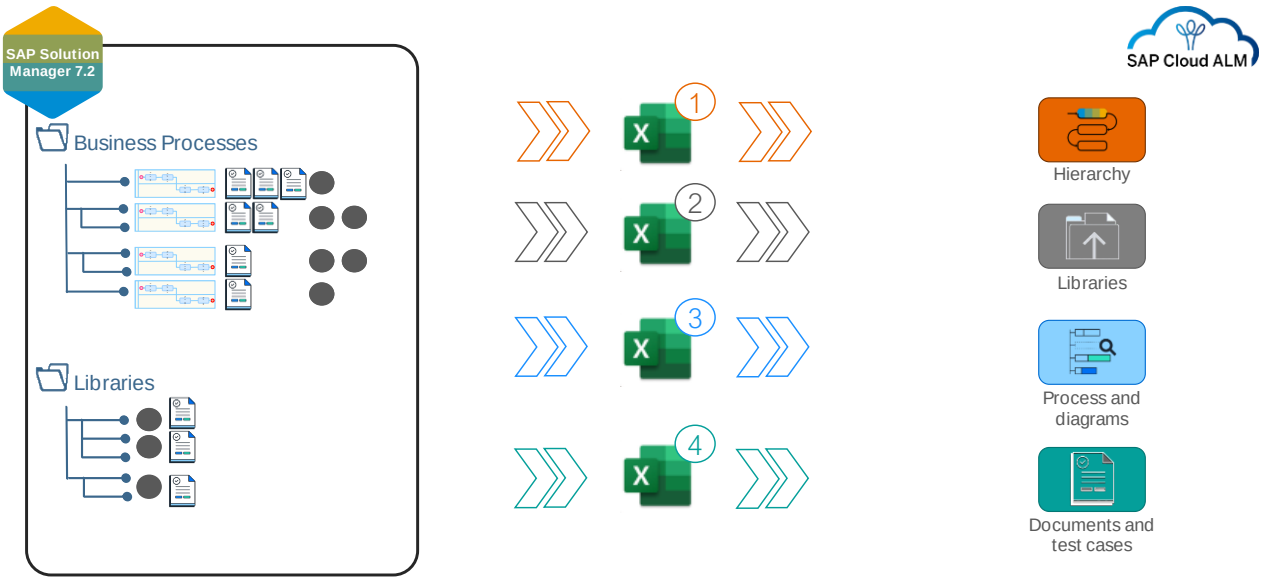


Figure 2: File-based approach of selective data transfer.

1.2 Discovering SAP Cloud ALM

To ensure your successful migration to SAP Cloud ALM, discovering the capabilities of SAP Cloud ALM is a critical step before you transition from SAP Solution Manager. This topic provides insights into how the new system aligns with business goals, supports functional enhancements, integrates with existing systems, and mitigates risks. Additionally, it aids in effective resource allocation, change management, cost-benefit analysis, strategic road mapping, enhancing user experience, and meeting regulatory requirements. By investing time in this discovery phase, you can pave the way for a smoother, more efficient, and more successful transition to SAP Cloud ALM. To stay

informed about the availability and capabilities of SAP Cloud ALM, regularly check SAP Road Map Explorer.

SAP Cloud ALM Learning Material

The SAP Cloud ALM Learning Portal serves as a central hub to access various educational resources tailored to different learning needs. Use these resources to stay up to date with SAP Cloud ALM innovations and enhance your ability to effectively manage and optimize SAP solutions.

Furthermore, SAP offers **Expert Guided Implementation (EGI)** sessions to assist you in the selective data transfer. These interactive sessions, delivered remotely by SAP experts, provide step-by-step guidance.

To find upcoming EGI sessions, including dates per region, visit:
SAP Enterprise Support Academy - Expert Guided Implementation Calendar

1.3 Keeping Track of Selective Data Transfer Capabilities

The capabilities for the selective data transfer from SAP Solution Manager to SAP Cloud ALM are released in separate iterations. This phased approach allows for continuous improvements and the addition of new capabilities over time. As a result, not all components may be available immediately. To stay informed about the availability and capabilities of selective data transfer, regularly check SAP Road Map Explorer.

Furthermore, you can check the details the selective data transfer availability. This overview helps you to evaluate the readiness and plan your system landscape transformations accordingly.

1.4 Limitations

The selective data transfer process focuses on specific applications in SAP Solution Manager 7.2, namely Process Management (incl. documents and test cases) and the Focused Build Test Step Designer.

Several applications within SAP Solution Manager are out of scope for the selective data transfer, such as:

- Test Suite
- Requirements Management
- Change Control Management
- IT Service Management
- Reporting

Additionally, certain types of data are excluded from the transfer:

- Alerting and Analytics Library
- Master data such as landscape and business partners

- Transactional and project-related data such as test plans, change documents (including Focused Build specific requirements, work packages and work items)
- Analytics e.g. from the Solution Readiness Dashboard.

The selective data transfer involves transferring specific, essential data rather than a complete dataset, ensuring that only relevant and valuable information is moved.

Note: The selective data transfer only allows for **initial uploads** of data from SAP Solution Manager to SAP Cloud ALM. **Updating previously uploaded data is not possible, once it exists in SAP Cloud ALM**.

1.5 SAP Cloud ALM Best Practice for Selective Data Transfer

The following overview shows how you move through the steps of the selective data transfer from SAP Solution Manager to SAP Cloud ALM, ensuring that essential data and relationships are accurately migrated. Thereby, you can minimize disruptions and maintain the integrity of your application lifecycle management.

You can leverage the SAP Best Practice Tools & Methodology for SAP Cloud ALM to follow and execute the selective data transfer process from SAP Solution Manager to SAP Cloud ALM. Preparation tasks for the selective data transfer:

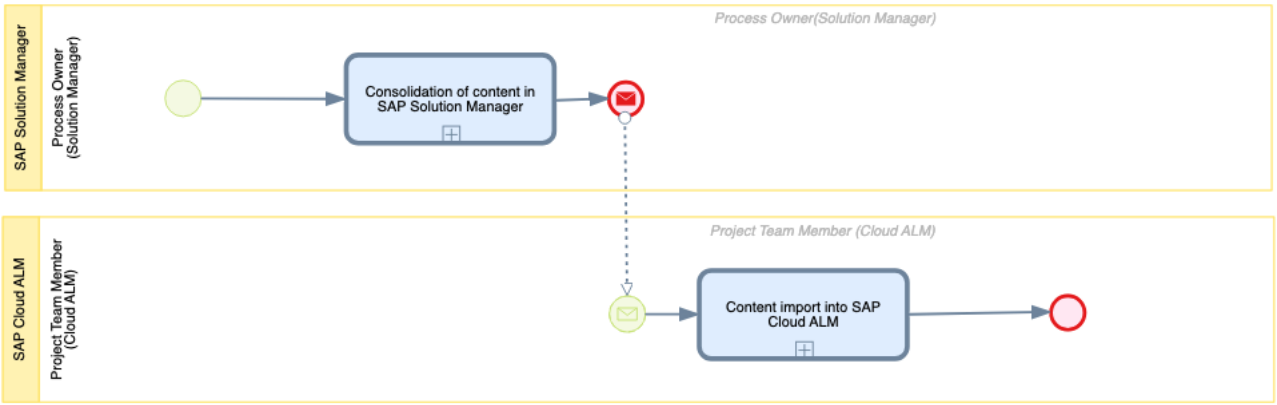


Figure 3: SAP Cloud ALM Best Practice for Selective Data Transfer

The diagrams illustrate the selective data transfer workflow for migrating content from SAP Solution Manager to SAP Cloud ALM. The selective data transfer process consists of two main phases:

Phase 1: Consolidation of Content in SAP Solution Manager

- The project team gathers, organizes, and consolidates relevant solution documentation in SAP Solution Manager before exporting it.
- This step ensures that only required content is transferred, avoiding redundant or outdated data.

Phase 2: Content Import into SAP Cloud ALM

- The consolidated content is uploaded to SAP Cloud ALM, where it is restructured based on the Cloud ALM framework.
- Once imported, the data can be utilized in process documentation, test management, and monitoring.

The detailed process diagram for Content Import into SAP Cloud ALM provides a step-by-step workflow for transferring content from SAP Solution Manager to SAP Cloud ALM. Below is an explanation of the key steps in the process:

Step 1: Identify Content for Transfer

- Project members define the scope of content to be transferred, e.g., business processes, test cases, documents.

- Only relevant content is selected to avoid unnecessary migration.

Step 2: Extract Content from SAP Solution Manager

- The selected content is exported from using the Selective Data Transfer tool.
- Content can include business processes, solution documentation, test scripts, and documents.

Step 3: Data Transformation & Cleansing

- The exported data is reviewed to ensure it meets SAP Cloud ALM's format requirements.
- If necessary, metadata is adjusted, such as updating external references, document structures, or renaming elements.

Step 4: Upload Content to SAP Cloud ALM

- The cleaned-up content is imported into SAP Cloud ALM using the data import function.
- Cloud ALM maps the imported data into the appropriate libraries, e.g. Process Library, Test Management, Document Management.

Step 5: Data Validation in SAP Cloud ALM

- The project team verifies the imported content to ensure it is structured correctly.
- Any missing links, incorrect mappings, or errors are fixed before finalizing the migration.

Step 6: Go-Live & Continuous Usage

- Once validated, the content is used in Cloud ALM for managing business processes, test cases, and operational documentation.
- End users and project teams can now work with the migrated content within Cloud ALM.

Note: Please review the availability of the single selective data transfer functionalities and steps detailed in the chapter Selective Data Transfer Availability to ensure the necessary prerequisites and configurations are in place for a seamless migration.

Note: SAP Cloud ALM doesn’t provide back-up or restore options. Testing and validation of the selective data transfer beforehand is essential.

1.6 Mapping Entities from SAP Solution Manager to SAP Cloud ALM

In the past, you have used SAP Solution Manager for process management and Focused Build test steps with the relevant entities. During the transition to SAP Cloud ALM, you get familiar with the new ALM concepts and related entities.

The following table shows which data from which areas in SAP Solution Manager can be transferred to the respective areas in SAP Cloud ALM. This mapping is predefined, you can’t modify it.

Step	Consists Of	SAP Solution Manager	⇨	SAP Cloud ALM
Step 1	Process Hierarchy	Folder / Scenario / Organizational Unit / Master Data / Library Folder	⇨	Process Hierarchy Node
Step 2	Libraries	Configuration	⇨	Configuration
		Development	⇨	Development
		Executables	⇨	Application
		Process Steps	⇨	Solution Activities
		Interfaces	⇨	Interface
Step 3	Process Content	Business Processes	⇨	Custom Solution Process
		Process Diagrams	⇨	Solution Process Flows
Step 4	Process Elements	Test Steps	⇨	Test Cases
		Documents	⇨	Documents

Figure 4: Mapping of entities in SAP Solution Manager to entities in SAP Cloud ALM.

Further considerations for the selective data transfer include:

- Logical Component Groups (System Groups), which define the system landscape;
- Tags, which enable categorization and filtering of data;
- Users, whose access and roles must be preserved or adjusted during transfer; and
- Document Type mapping, which ensures alignment of document types between systems to maintain consistency and functionality.

These elements are critical to ensure a seamless, efficient, and compliant data transfer process. For a detailed explanation and implementation guidance, refer to the chapter Preparing the Data Transfer in SAP Cloud ALM.

1.6.1 Upload Sequence and Rebuilding Relations Between Entities

Note: It is crucial to follow the correct upload sequence in SAP Cloud ALM. Uploading data in the wrong order can result in unresolved or lost relationships between entities, broken links, reduced data integrity, and the need for full re-uploads of related data.

Each spreadsheet file holds external reference ID information, serving as a stable identifier used to rebuild relations during upload.

To maintain consistency and functional integrity during the selective data transfer, SAP Cloud ALM provides two mechanisms to manage relationships between entities:

A. Regular Relations (Recommended)

When entities are uploaded in the correct order using spreadsheet templates, SAP Cloud ALM can automatically rebuild the relationships from SAP Solution Manager. (See Figure 5)

- This process only works correctly if all referenced entities are already available in the system.
- The system uses external reference IDs to match and recreate links between related entities.

Example:

1. Upload the process hierarchy in the *Process Hierarchy* app.
2. Upload documents in the *Documents* app → A regular relation is created.

B. Prepared Relations (Temporary and Risk-Prone)

If data is uploaded out of sequence (e.g. a document references a hierarchy node that hasn't been uploaded yet), SAP Cloud ALM creates a *prepared relation*. This is a placeholder that will only become a real relation once the referenced entity is uploaded. (See Figure 5.)

- Prepared relations are temporary and fragile.
- If parts of the data (e.g. the hierarchy) are later deleted and uploaded anew, without including all related objects, these prepared or previously resolved relations can be lost.

Risk Scenario:

1. You upload documents first → prepared relation to the process hierarchy is created.
2. You upload the process hierarchy next → the prepared relation is resolved.
3. You delete and re-upload only the Process Hierarchy → all relations are lost.

Solution: Always re-upload all connected data together, e.g. documents + hierarchy, to preserve relationships.

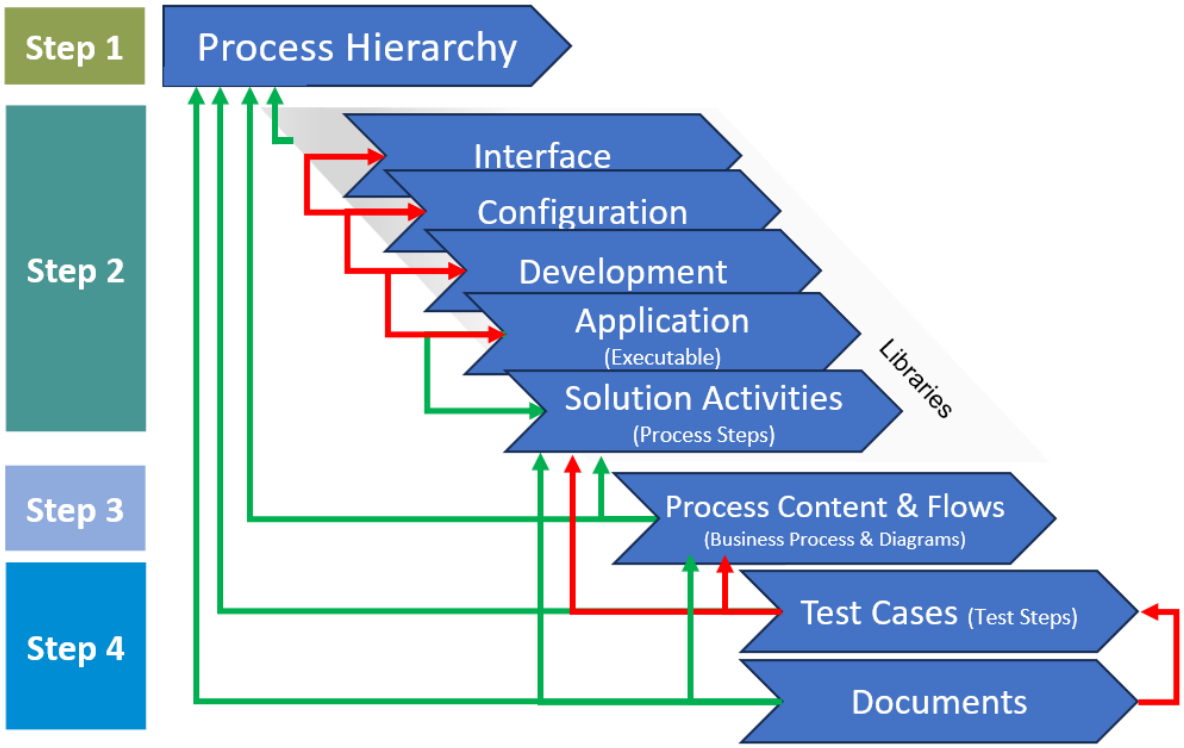


Figure 5: Rebuilding relations during the spreadsheet upload to SAP Cloud ALM:

- Green lines: Relations to entities from previous SAP Solution Manager uploads. SAP Cloud ALM can establish the relations if you have imported the related entities before.
- Red lines: Saving of prepared relations to entities that do not yet exist. SAP Cloud ALM can establish the relations as soon as the related function is available and when you import the related entities. We recommend that you import the data in the documented sequence to prevent missing references.

FAQ

- Q: In which order should the upload ideally be performed?

  A: The process hierarchy should be uploaded first before library objects such as applications and other related objects.

- Q: What happens if library objects are uploaded before the process hierarchy?

  A: If library objects are uploaded first, the upload time for the process hierarchy noticeably increases for the user due to the evaluation of relationships.

- Q: What happens if we export the process hierarchy from several branches, e.g. PRD, DEV, MAINT, DESIGN? Will the processes appear several times in SAP Cloud ALM?
  A: No, process hierarchies and other elements are not created several times in for the selective data transfer, even if they exist in several branches. The Occurence IDs (External Reference IDs) used in SAP Solution Manager are globally unique, regardless of the branch.

The upload to SAP Cloud ALM checks whether an External Reference ID already exists. If it does, you are informed accordingly. There is no automatic update or overwrite of existing content in SAP Cloud ALM.
Therefore, if you export content from several branches, ensure you clearly decide which branch version you want to transfer, as only the first upload with a given ID will be accepted — any subsequent ones with the same ID will be rejected.

2 Preparing the Data Transfer with SAP Readiness Check

SAP Readiness Check analyzes your current SAP Solution Manger 7.2 system and provides a comprehensive readiness report. It helps you to understand which parts of your data are ready for the transfer to SAP Cloud ALM. It also highlights any potential gaps or prerequisites that need to be addressed before initiating the transfer.

SAP Readiness Check is available publicly in SAP for Me, and on the launchpad of your own SAP Cloud ALM tenant. We recommend that you use SAP Readiness Check in your SAP Cloud ALM implementation to profit from an enhanced integration with SAP Cloud ALM. For more information, see Availability of SAP Readiness Check.

There is a specific check scenario for SAP Cloud ALM (see Functions of SAP Readiness Check for SAP Cloud ALM), which includes also checks for selective data transfer (see SAP Note 3236443).

The SAP Solution Manager data collector has been updated for this new capability. Make sure to implement SAP Note 3236443 version 31 (or higher) before running the collector program. Update your SAP Readiness Check analysis to upload the enhanced data collection archive.

SAP Readiness Check analyzes the following technical prerequisites:

- Compatibility with your SAP systems, check for required software versions, and ensure connectivity.
- Analyze relevant data for the data transfer:
  - Process hierarchy
  - Libraries
  - Business processes and diagrams
  - Documents and test steps
- Compatibility of identified ALM processes with SAP Cloud ALM.
- Availability status and best practices for preparing your environment, such as system upgrades, configuration adjustments, and other.
- Determine required skills and resources for your team to adopt and use SAP Cloud ALM.

Furthermore, the SAP Readiness Check analysis offers a comprehensive view of all solutions and branches within your SAP Solution Manager system. This insight is essential for selecting the appropriate source branch for your selective data transfer project.

Scope Analysis Overview:

- Total number of solutions and branches
- Total number of changes to elements in branches over the last 12 months
- Aggregated changes for all solutions, highlighting the top 5 solutions based on change volume

Scope Analysis Details:

- Information on all solutions, including changes to solution documentation elements
- Tabs for each branch showing the elements involved in each selective data transfer step and the number of recent changes
- Highlighting solution documentation elements not included in the selective data transfer due to the lack of an export tool or equivalent entity in SAP Cloud ALM

Solution Data:

- General information, logical component groups, solution settings, public scopes, custom attributes, and business partner attributes
- Necessary configurations and customizations for accurate data transfer to SAP Cloud ALM

Branch Data:

- Solution documentation elements for each selective data transfer step, number of objects and recent changes
- Elements excluded from the selective data transfer and providing insights into branch usage and future content management needs

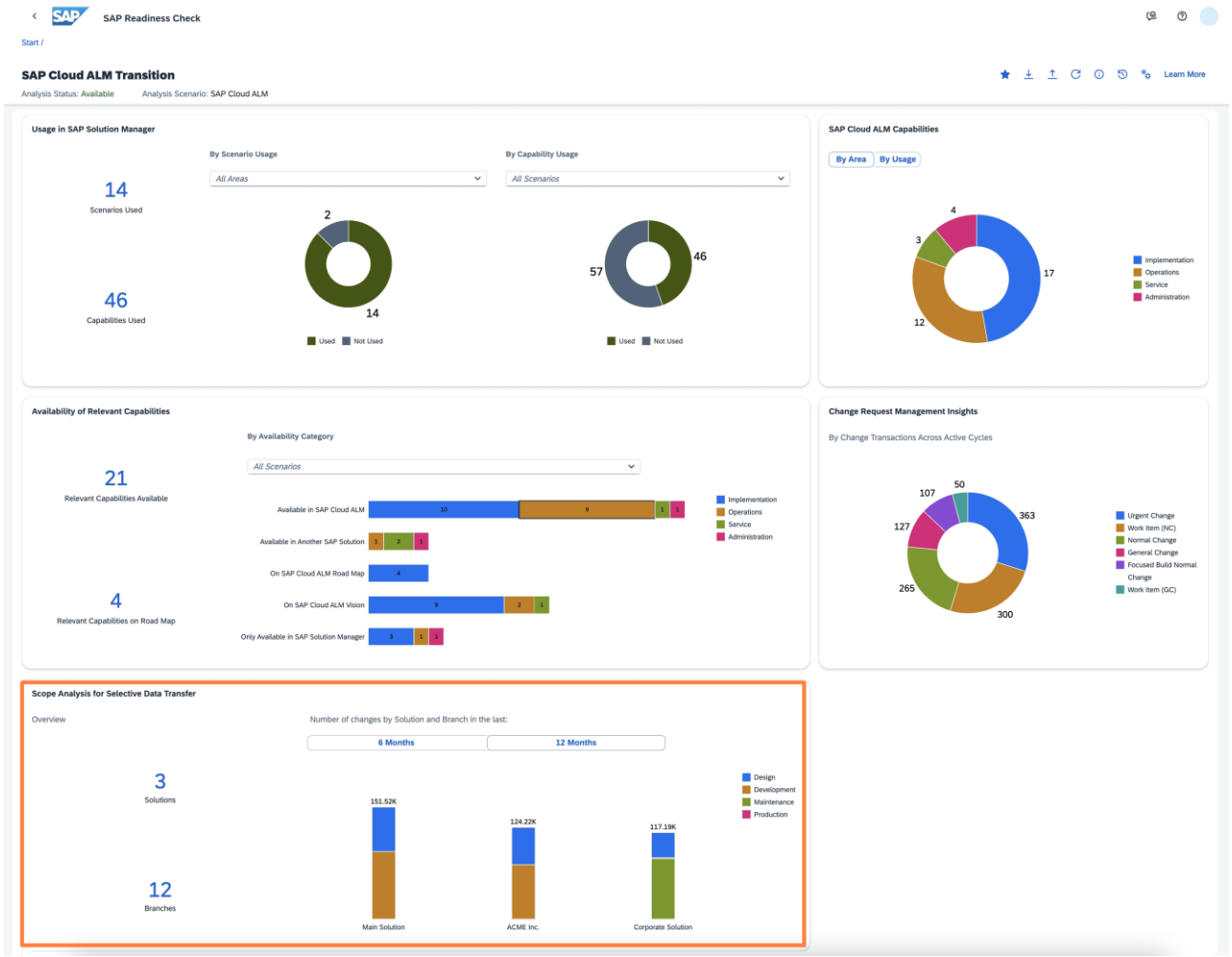


Figure 6: Dashboard of SAP Readiness Check for SAP Cloud ALM

3 Preparing the Data Transfer in SAP Cloud ALM

3.1 Setup and Administration for SAP Cloud ALM

Set up and configure SAP Cloud ALM as described in the Setup and Administration guide. The guide addresses system administrators and key users as a target audience.

On the launchpad in SAP Cloud ALM, you can find the **Get to know SAP Cloud ALM** app. This app guides you through the first and most important steps to configure and use all areas of SAP Cloud ALM: Implementation, Operations, Transformation, and Service Collaboration.

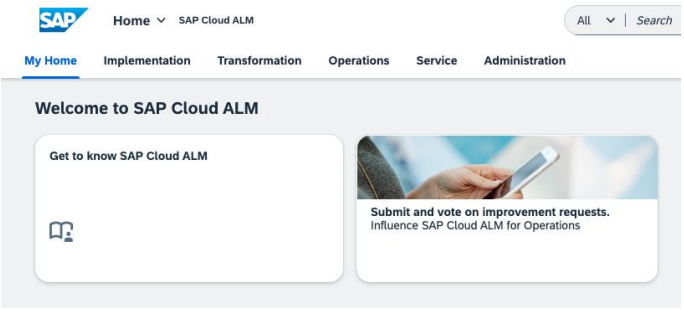


Figure 7: The SAP Cloud ALM launchpad.

3.2 User Management

To manage and work with users in SAP Cloud ALM, it is essential to first create or import them into your identity provider. Users must be maintained in both the identity provider and SAP Cloud ALM to enable logins. Once users are onboarded, they can be added to SAP Cloud ALM, and suitable roles must be assigned to grant them the necessary authorizations for their tasks.

For more information, see Onboard User in the Identity Authentication Service.

For the selective data transfer from SAP Solution Manager to SAP Cloud ALM, there are two key aspects:

- User Execution: The users who perform the selective data transfer in SAP Solution Manager and SAP Cloud ALM.
- User Information Transfer: User data in SAP Solution Manager's Process Management and Focused Build Test Step Designer, such as Process Responsible, Document Owner, or Test Step Owner, which you wish to transfer.

In SAP Solution Manager, there are specific authorizations required to perform the selective data transfer. For further information, check the related Selective Data Transfer help for SAP Solution Manager.

In SAP Cloud ALM, there are no specific roles required to execute the selective data transfer. It aligns with the general setup and administration activities for SAP Cloud ALM as described in Required Setup for SAP Cloud ALM.

In SAP Cloud ALM, there are no specific roles required to execute the data transfer itself, but users must be assigned the appropriate roles to work with the uploaded content. The following table outlines the required role titles by functional area:

Functional task	Required Role Title
SDT Project and System Group setup	Project Member
Tag Group creation	Tag Administrator
Upload Process Hierarchy	Process Hierarchy Author
Upload Libraries	Project Member

Functional task	Required Role Title
Upload Solution Activity	Process Management Process Author
Upload Processes	Process Management Process Author
Documents	Project Member
Test Cases	Project Member

These are the business role titles users should be assigned in SAP Cloud ALM to view, maintain, or manage relevant data.

For a complete overview and detailed descriptions of available roles, see the SAP Help Portal: Role Collections for SAP Cloud ALM.

3.2.1 Transferring User Information from Business Partners

As part of the selective data transfer, you can transfer specific user information from SAP Solution Manager to SAP Cloud ALM.

In SAP Solution Manager, this user information is based on business partners (BP) assigned as **Responsible** or **Owner** to entities like business processes, diagrams, documents, and test steps.

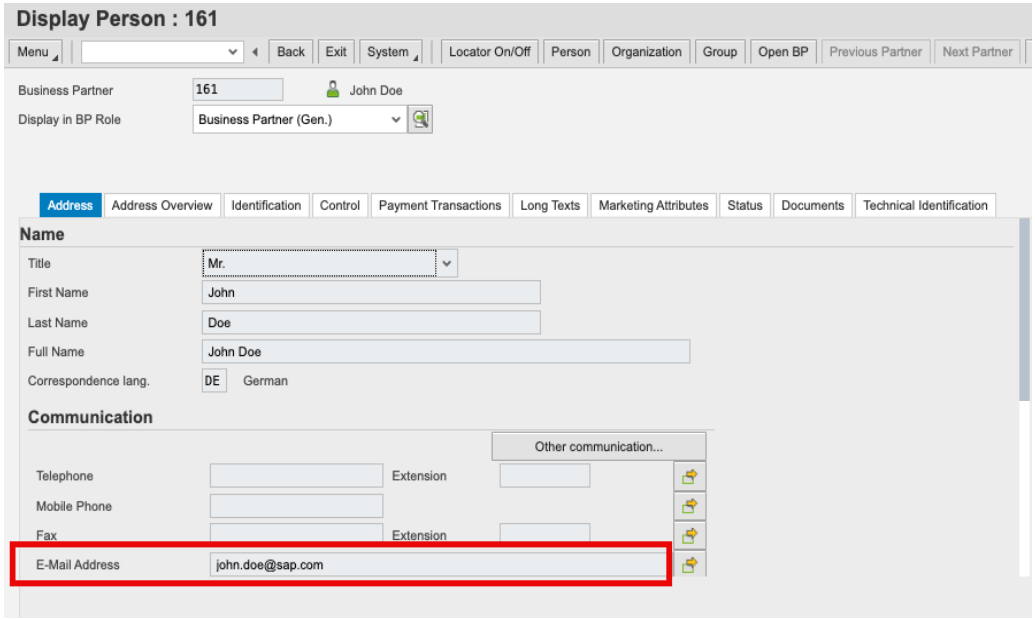


Figure 8: Business partner information with email address in SAP Solution Manager.

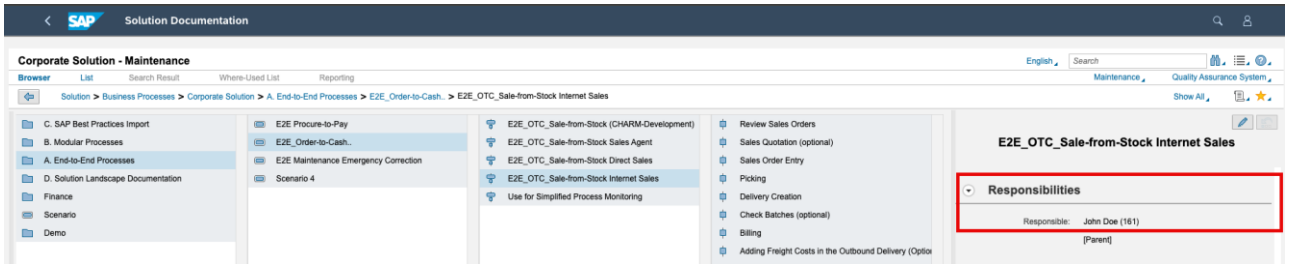


Figure 9: Example of business partner assigned as Responsible to business process in SAP Solution Manager.

Note: The selective data transfer does not support mass transfer of data such as users or business partners from SAP Solution Manager to SAP Cloud ALM. Only the relationship of entities (e.g. business process or documents) to business partners can be transferred.

The selective data transfer allows you to transfer business partner information based on the email address configured in the business partner settings of SAP Solution Manager. This email address is later included in the exported selective data transfer spreadsheet files from SAP Solution Manager. So, the email address must be assigned to a business partner in SAP Solution Manager.

In SAP Cloud ALM, you can assign owner information via the **User Management** app. You can then assign this owner to custom solution processes, solution processes, documents, or test cases.

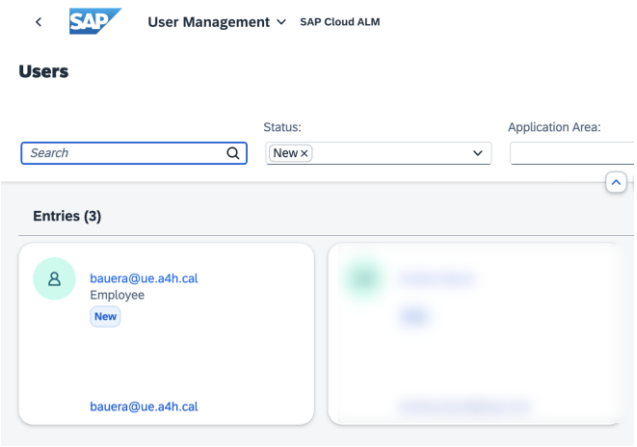


Figure 10: User Management in SAP Cloud ALM.

Limitations:

- In SAP Solution Manager, you can assign a **Responsible** to folders and scenarios in the Process Hierarchy, but SAP Cloud ALM does currently not support owner assignments to the Process Hierarchy. Therefore, it is not considered by the selective data transfer.
- The field **Responsible** is not supported in SAP Cloud ALM. If used (e.g. on a business process or document), it is shown as **Owner** in SAP Cloud ALM.

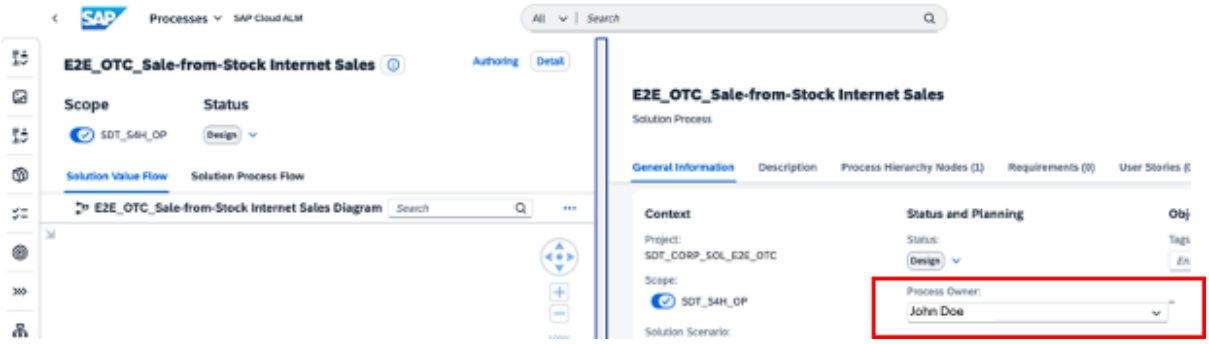


Figure 11: User assigned as process owner to a solution process in SAP Cloud ALM.

To meet the prerequisites of the selective data transfer, all users must be onboarded via their email addresses used in the **Owner** or **Responsible** attribute in Process Management in SAP Solution Manager and in the Test Step Designer in Focused Build.

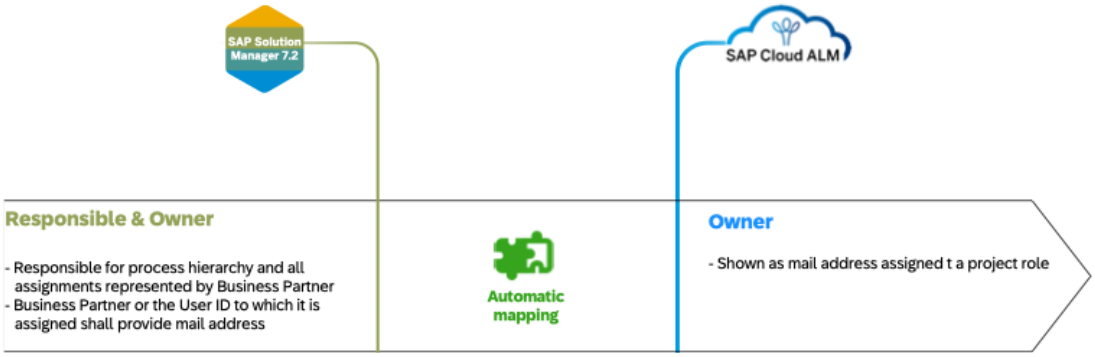


Figure 12: Selective data transfer: concept of owner and responsible person

3.2.2 Identifying Business Partner Attributes from SAP Solution Manager

SAP Readiness Check for SAP Cloud ALM helps you to identify the use of business partner attributes. The analysis shows the use of the attributes in a defined solution. For legal reasons, the analysis does not provide detailed business partner information. For more information, see Preparing Data Transfer with SAP Readiness Check.

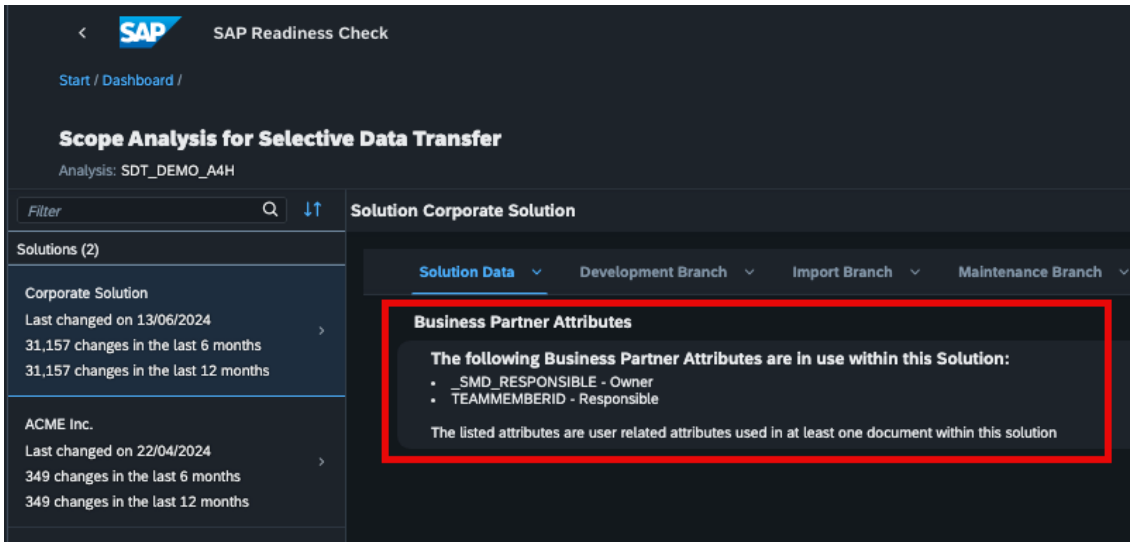


Figure 13: Identified business partner attributes in the SAP Readiness Check analysis.

To find entities that use business partners for Responsible and Owner, you can use the list view or reporting function in SAP Solution Manager – Solution Documentation. For example, navigate to the business process folder and select *List*, add the *Responsible* and *Owner* columns, and filter by type (process and document): Here you can identify all business partners used as Owner or Responsible.

The selective data transfer extracts the business partner email addresses during the export. However, you need to onboard these users in SAP Cloud ALM before uploading the selective data transfer files.

If you prefer not to transfer or replace this data, it can be managed in Solution Documentation or later in the selective data transfer spreadsheet file.

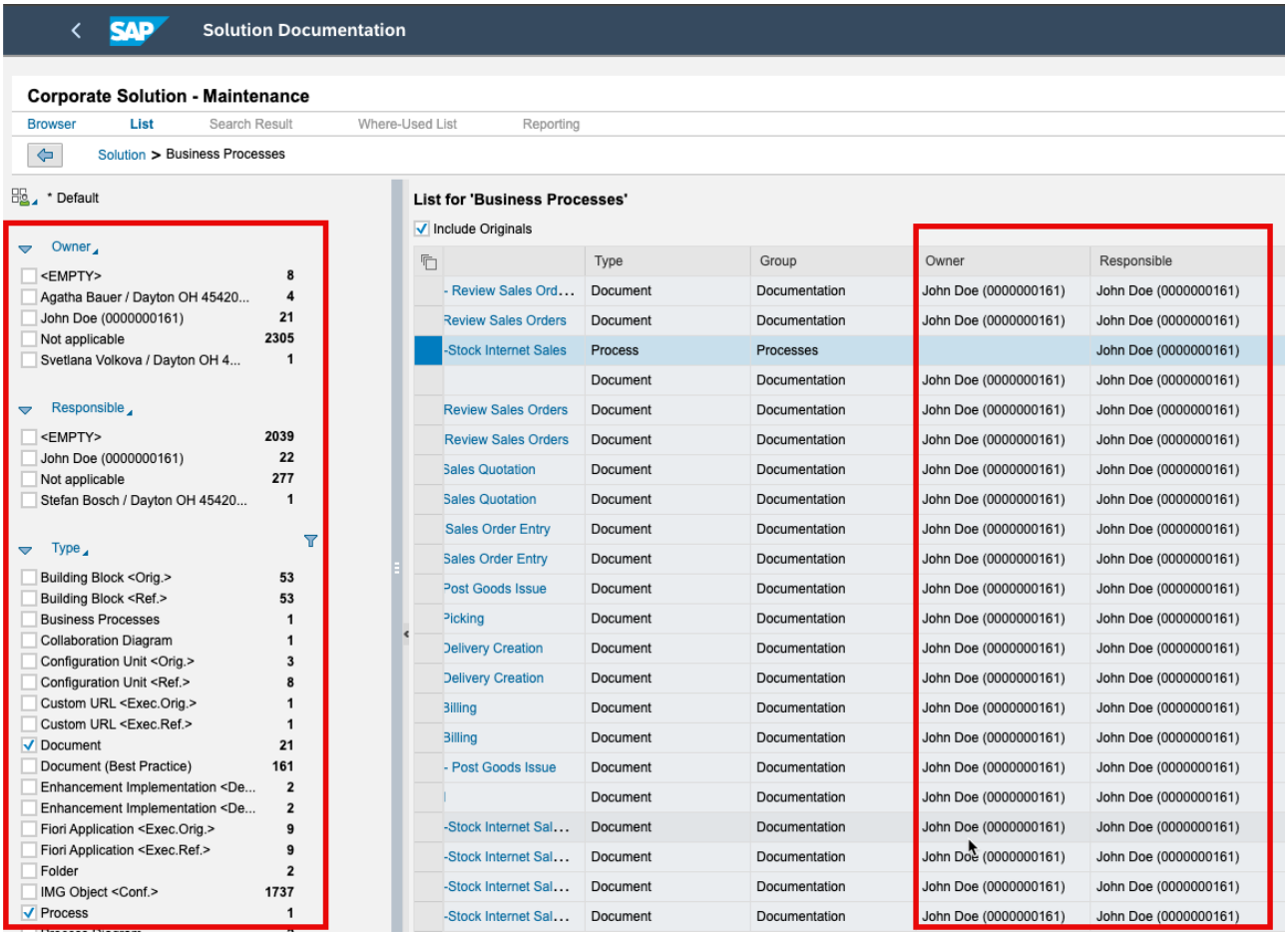


Figure 14: Overview of responsible persons and owners in SAP Solution Manager – Solution Documentation.

3.3 SAP Cloud ALM: Projects and Scopes

By systematically setting up projects and scopes in SAP Cloud ALM, you create a robust framework that not only supports the immediate transition from SAP Solution Manager but also positions your organization for efficient process and test management in the future. This methodical approach minimizes risks, enhances data integrity, and ensures a smooth transition while maintaining a clear pathway for future usage.

For detailed guidance on setting up projects and scopes in SAP Cloud ALM, refer to the Project Management Overview and Process Management Scopes.

3.3.1 Projects

A project in SAP Cloud ALM serves as a central container that organizes and consolidates all relevant activities, configurations, and resources related to your transition initiative. By setting up a project, you create a structured environment where all transition-related tasks can be managed systematically. The project acts as a single source of truth, ensuring that all stakeholders have access to the necessary information and tools to perform their roles effectively.

This centralized structure also allows for a seamless integration with other SAP Cloud ALM functionalities, such as Process Management, Document Management and Test Management. After the transition phase, the project continues to serve as a repository for ongoing activities, providing a coherent framework for managing business processes, and testing scenarios as your organization evolves within the SAP landscape.

3.3.2 Scopes

Within a project in SAP Cloud ALM, scopes are defined to segment and focus on specific areas or phases of the transition. A scope in SAP Cloud ALM enables you to isolate certain data sets, configurations, or processes that need to be transferred from SAP Solution Manager to the new environment. This selective approach ensures that only relevant data is migrated, minimizing complexity, and reducing the risk of errors.

Scopes can be tailored to represent different functional areas, business units, or phases of the transition. This flexibility allows you to manage each aspect of the transition with precision and clarity, ensuring that all critical data is accounted for while unnecessary data is excluded.

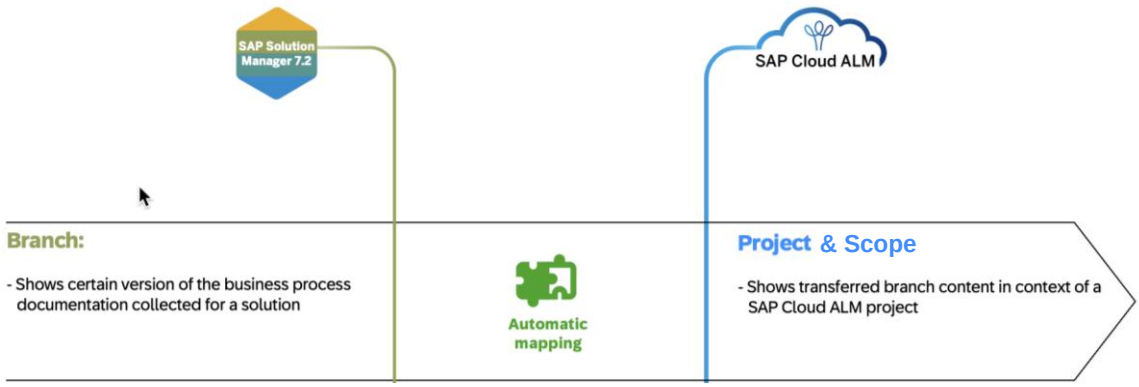


Figure 15: From Branch to Project during the selective data transfer

Business process documentation is migrated from a branch in SAP Solution Manager into a project and scope in SAP Cloud ALM. In SAP Solution Manager, a branch holds a specific version of business process documentation, for a solution.

3.3.3 Creating Project and Scope

Create a project:

1. In SAP Cloud ALM, on the *Implementation* tab, choose *Projects and Setup*.
2. On the *Manage Projects* view, choose *Create*.
3. Provide a unique name for the project that reflects its purpose, e.g., "Solution Manager Transition".
   Optionally enter additional details such as the project description, start and end dates, and assign project members. Ensure that the roles and responsibilities of each member are clearly defined.

4. Save your project. You can then configure additional settings, such as assigning specific tasks or integrating other SAP Cloud ALM functionalities.

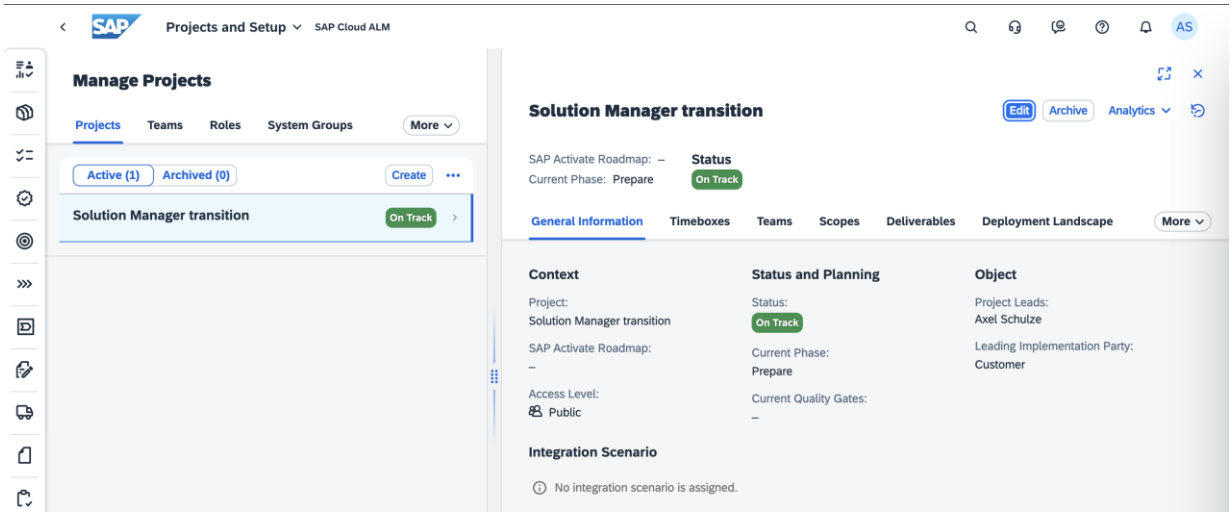


Figure 16: The Projects and Setup app in SAP Cloud ALM.

Define a scope:

1. From the sidebar navigation on the left, choose **Manage Scopes**.
2. Choose *Create* → *Scope*. Enter a name according to the specific data set or phase it will cover, e.g., "Solution Manager Transition".
   For the pure selective data transfer purpose, you don't necessarily have to select a solution scenario for your scope.
3. Review the scope details and save your configuration. You can now proceed with the selective data transfer, focusing on the areas defined within this scope.

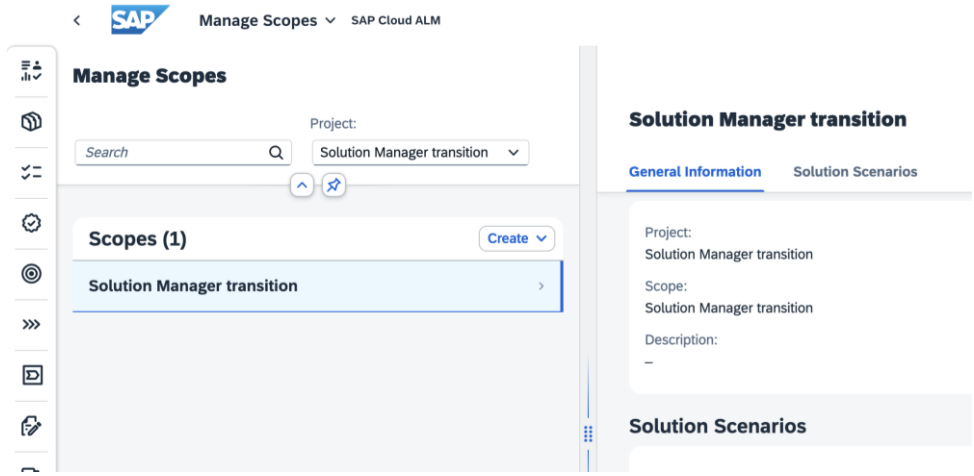


Figure 17: The Manage Scopes app in SAP Cloud ALM.

FAQ

- Q: Why is the "Custom" Solution Scenario not available for selection in Cloud ALM Scoping?

A: The "Custom" Solution Scenario cannot be activated during scoping until custom solution processes have been created or uploaded into Cloud ALM.

3.4 Landscape Management

With the Landscape Management app in SAP Cloud ALM, you manage information on your services, systems, and business services. This is the basis for all SAP Cloud ALM apps.

Note: Perform the Landscape Management setup prior to the selective data transfer. For more information, see Set Up Landscape Management.

3.4.1 System Groups

In SAP Solution Manager, logical component groups are a foundational concept used to organize and manage the various technical systems within an SAP landscape. These groups provide a structured way to handle multiple systems that work together to support a specific business process or application. By grouping related systems, logical component groups enable more efficient monitoring, troubleshooting, and lifecycle management.

In SAP Cloud ALM, a system group is a logical grouping of SAP systems that are managed together as a single entity. These systems can include different types of SAP solutions, such as SAP S/4HANA, SAP Business Suite, SAP Fiori, or even third-party applications that are integrated into the SAP landscape.

The selective data transfer facilitates the mapping of logical component groups from SAP Solution Manager to system groups in SAP Cloud ALM, ensuring an accurate and efficient alignment of system structures across platforms.

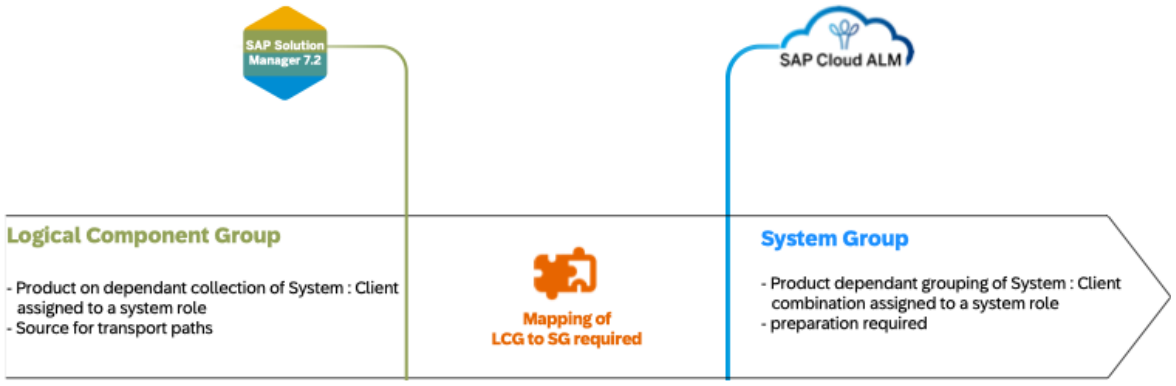


Figure 18: Logical component groups and systems groups as entities in the landscape management, relevant for selective data transfer.

SAP Readiness Check for SAP Cloud ALM provides valuable insights into the current usage of logical component groups within SAP Solution Manager. By analyzing these groups, it helps organizations understand how they are used in process management, including their role in monitoring, change management, and the overall system organization. This assessment enables a smoother transition to SAP Cloud ALM, ensuring that logical component groups are effectively

leveraged for continued process efficiency and alignment in the cloud environment. For more information, see [Preparing Data Transfer with SAP Readiness Check](#).

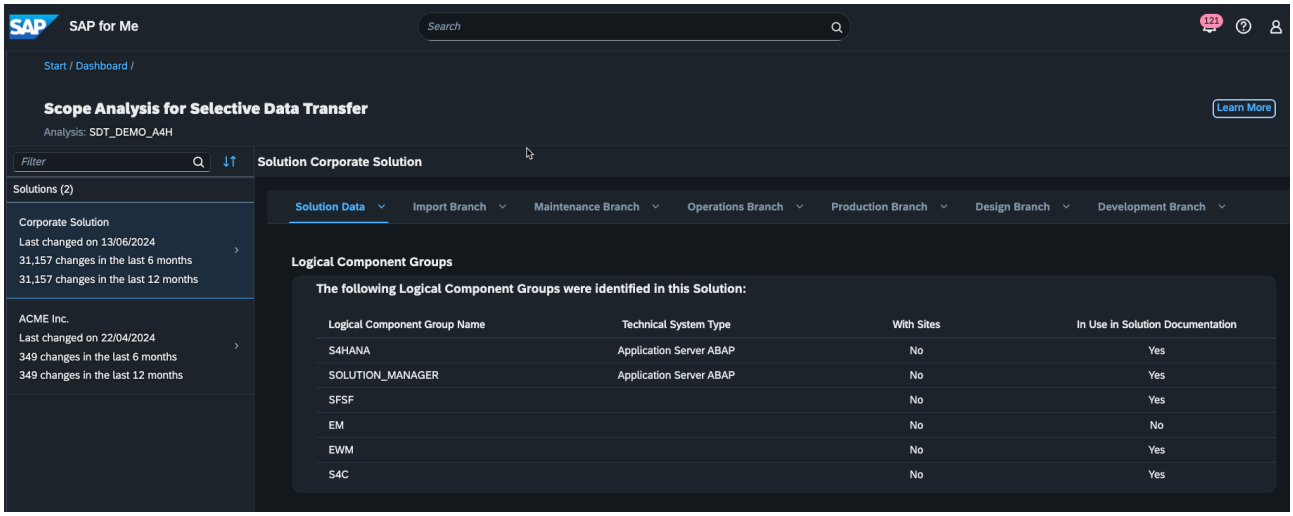


Figure 19: Analysis of logical component groups in SAP Readiness Check for SAP Cloud ALM.

Creating system groups:

1. In SAP Cloud ALM, go to the *Project and Setup* app.
2. On the *System Groups* tab, choose *Create*. Fill in a title and select a product from the drop-down menu.
   Note: The drop-down list is based on your setup in the Landscape Management app.
3. Save your system group.

Editing system groups:

1. To add systems to existing system groups, select a system group and choose *Edit* in the details view.
2. Assign one or more systems. You can assign multiple systems to your system group. The list of systems in the drop-down menu depends on the systems maintained in the Landscape Management app.
3. Save your changes.

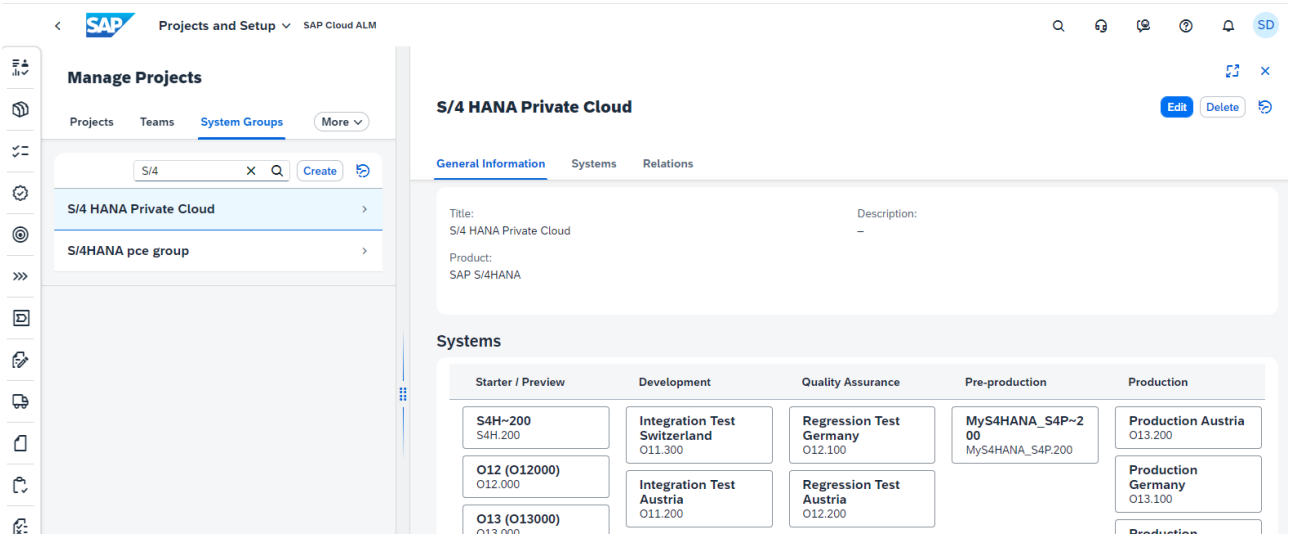


Figure 20: System group editing in the Projects and Setup app of SAP Cloud ALM.

Note: For the selective data transfer, it's not required to create the systems and assign them to system groups in SAP Cloud ALM before starting the data transfer.

FAQ

Q: Why don't I see any entries in the product drop-down list during system group creation?

A: If you do not see any products in the drop-down list when trying to create a system group in SAP Cloud ALM, it is likely due to the setup in the Landscape Management app. The product options in the drop-down list are populated based on the configurations and entries maintained in the Landscape Management app. To resolve this issue, go to SAP Cloud ALM launchpad → *Administration* → *Landscape Management* → *Configuration* → *Import of subscribed SAP Services* → Click on *Error* icon → Select *Import My Subscribed SAP Services*.

3.5 Tag Management

The transition of both SAP standard attributes and customer-specific attributes is critical to ensure data integrity and continuity.

3.5.1 Attributes vs. Tag Groups

In SAP Solution Manager, these attributes are associated with various objects, such as folders, business scenarios, processes, and documents. The challenge is to transfer them effectively into the Tag Management app of SAP Cloud ALM where they continue to be used in a structured way.

In SAP Solution Manager, attributes are used to categorize and manage different objects:

- Structure attributes: Include folders in the process and library areas, business scenarios, processes, configuration units, and library elements. These attributes help to organize and manage the vast collection of business processes and associated documentation.

- Document attributes: They relate to documents and document-based test cases, playing a crucial role in the management and retrieval of documentation within the system.

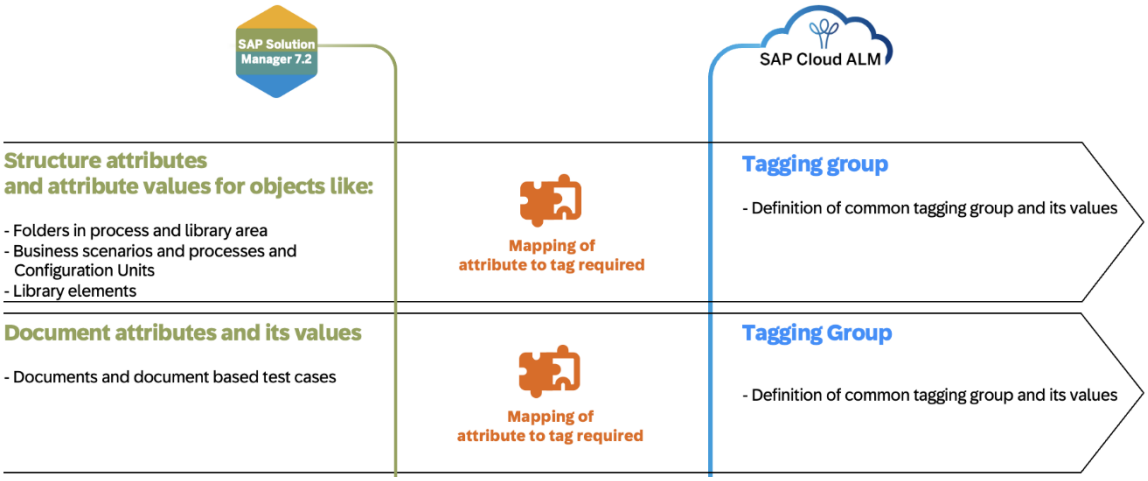


Figure 21: Structure and documents attributes in SAP Solution Manager become tagging groups in SAP Cloud ALM.

The tag group in SAP Cloud ALM represents a collection of tags that can be assigned to various objects, similarly to the use of attributes in SAP Solution Manager.

3.5.2 Using SAP Readiness Check to Identify Attributes for Data Transfer

SAP Readiness Check for SAP Cloud ALM also gives insights on the attributes that are currently in use, in SAP Solution Manager. The check report includes detailed information about the attributes used across different objects, such as business processes, documents, and configuration units.

It identifies both standard SAP attributes and customer-specific attributes that have been defined to meet specific business needs.

By leveraging SAP Readiness Check, you can gain a clear understanding of the attributes in your SAP Solution Manager environment, making the transition to SAP Cloud ALM more efficient and reducing the risk of data loss or misconfiguration. This proactive approach ensures that your organization's data structure is preserved and optimized for the new platform.

Identify critical attributes: SAP Readiness Check helps you to pinpoint critical attributes that are heavily used or have a significant impact on your business processes. That allows you to prioritize these attributes during the transfer, ensuring that they are accurately mapped to the corresponding tag groups in SAP Cloud ALM.

For customer-specific attributes, SAP Readiness Check can highlight those that may require special attention or custom handling during the migration process.

Prepare tag mapping: Once the relevant attributes are identified through SAP Readiness Check, you can begin planning the mapping process to tag groups in SAP Cloud ALM. The detailed attribute data provided by the readiness check allows for a more informed and efficient mapping process.

SAP Readiness Check also provides guidance on potential issues or conflicts that may arise during the migration of attributes, enabling you to address them proactively.

1. Run SAP Readiness Check in your SAP Solution Manager system. For more information, see Preparing Data Transfer with SAP Readiness Check.
2. In the check report, review the sections that detail the attributes associated with various objects. Pay special attention to any custom attributes or those that are critical to your business processes.
3. Create a list of all identified attributes, categorizing them into standard and custom attributes. Note any dependencies or special considerations that are highlighted by the check report.

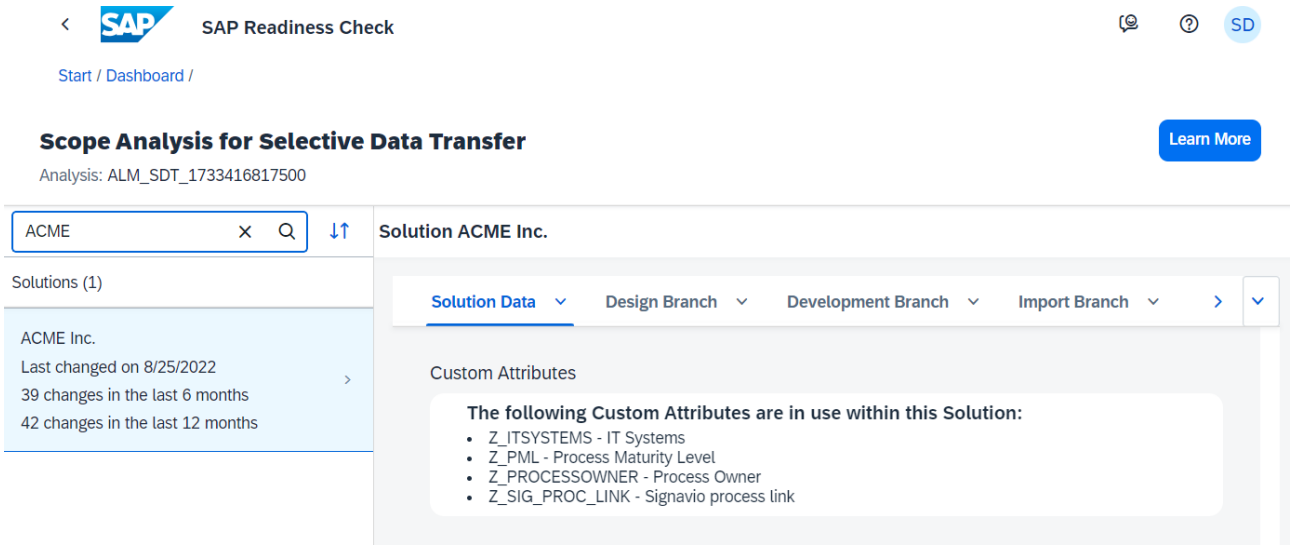


Figure 22: Attribute analysis in SAP Readiness Check for SAP Cloud ALM.

3.5.3 Mapping Attributes to Tag Groups

By carefully mapping structure and document attributes from SAP Solution Manager to tag groups in SAP Cloud ALM, you can preserve your data categorization structure and continue to manage your business processes effectively in the new environment.

1. Identify attributes in SAP Solution Manager. List all the attributes used for structure and document objects in SAP Solution Manager. Understand their purpose and how they contribute to the organization of your data.
2. For each attribute, create a tag group in SAP Cloud ALM. Define the values within each group to match those from SAP Solution Manager. For example, if a structure attribute in SAP Solution Manager categorizes processes by region, you need a similar tag group in SAP Cloud ALM to represent this categorization. For more information about how to create tag groups, see Tag Management.
3. Verify and adjust: After the initial mapping, review the tags in SAP Cloud ALM to ensure they accurately represent the data categories as intended.

3.5.4 Using the Custom Attribute “Selective Data Transfer” (Optional)

You can define a custom attribute named "Selective Data Transfer" to streamline the process of identifying and transferring only the most relevant elements. This custom attribute acts as a marker that helps to filter and select specific data that needs to be included in the data transfer. With this "Selective Data Transfer" attribute you achieve the following:

- Identify critical elements: Mark specific business processes, configurations, documents, and other objects that are essential for operations and need to be transferred.
- Exclude non-essential data: Exclude non-essential or outdated elements from the transfer process, reducing clutter, and ensuring that the new system contains only relevant and up-to-date information.
- Facilitate data filtering: During the data transfer, filter for and select only those elements tagged with "Selective Data Transfer" to make the migration process more manageable and focused.

For example, when you’re planning to transfer financial processes, you apply the "Selective Data Transfer" attribute in SAP Solution Manager to all relevant financial business processes, configurations, and documents. Later, only elements marked with "Selective Data Transfer" are transferred, ensuring that the new SAP Cloud ALM environment contains only the most crucial financial data, free from unnecessary or outdated information.

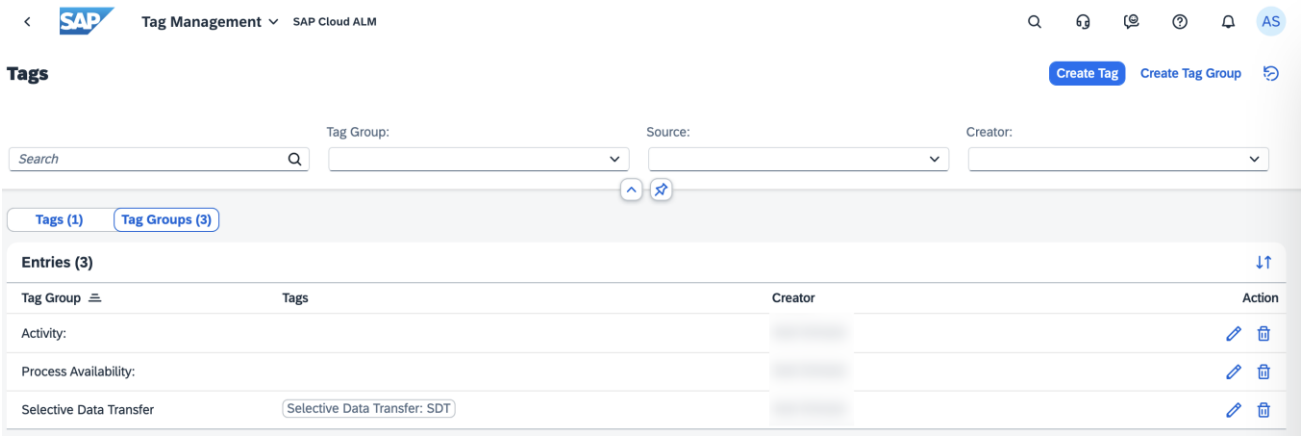


Figure 23: Tag group creation in SAP Cloud ALM

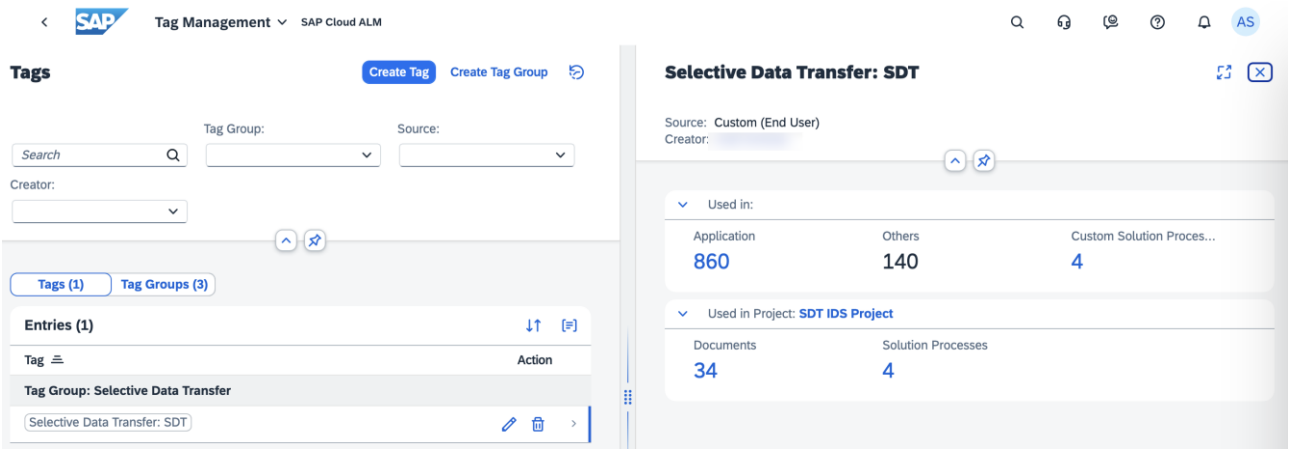


Figure 24: Where-used information for tags in SAP Cloud ALM.

4 Testing the Selective Data Transfer

The selective data transfer is a one-time activity with significant implications if not executed correctly. Data that has been transferred, cannot be overwritten and corrected by another data transfer.

SAP Cloud ALM does not offer a reset or backup functionality once the data has been transferred. This means that once the selective data transfer has been completed, there is no automated way to roll back or undo it. If errors are made during the transfer, or if irrelevant data is included, these elements must be deleted manually in SAP Cloud ALM. This can be time-consuming and is prone to further mistakes.

To mitigate risks, it is essential to conduct comprehensive testing using a small, representative set of test data:

- Validate the transfer process: Verify that the selective data transfer works as expected, and that you can transfer the correct data in the appropriate format without loss or corruption.
- Identifying potential issues: Identify and address any issues or inconsistencies in the data mapping, attribute conversion, or overall transfer process before they affect a larger dataset.
- Ensure data integrity: Confirm that the data integrity is maintained during the transfer, ensuring that all necessary elements are accurately reflected in SAP Cloud ALM.
- Fine-tune the process: Refine the selective data transfer, making necessary adjustments based on your test results.

Recommended approach for testing:

1. Select a subset of your data from SAP Solution Manager that reflects the diversity and complexity of the full dataset. Include different types of business processes, configurations, and documents that will be part of the actual transfer.
2. Perform the selective data transfer using the test data, carefully monitor the process and note any discrepancies or issues that arise.

3. Review the data in SAP Cloud ALM to ensure that all elements have been correctly transferred. Validate that the data is accurate, complete, and properly organized within the new environment.
4. Make necessary adjustments to the selective data transfer. This might involve tweaking the data mapping, adjusting attribute definitions, or refining the selection criteria for the data to be transferred.
5. Once the test phase has successfully finished, and you are confident in the selective data transfer, proceed with the full transfer, applying the lessons learned from the testing phase.

5 Upload Behavior and Error Handling

When working with data uploads in SAP Cloud ALM, there are several key considerations to keep in mind to ensure a smooth process. Proper understanding of the upload behavior and effective error handling strategies are crucial to maintain data integrity and minimize disruptions.

When you export data from SAP Solution Manager, the system generates a spreadsheet file in Microsoft Open XML Format (XLSX). It already contains the necessary data structures and fields required for your selective data transfer.

SAP Cloud ALM offers a generic spreadsheet upload that is flexible and user-friendly, allowing you to upload various types of data into the system. You can directly upload the downloaded data from SAP Solution Manager, without reformatting it. For more information, see:

- Creation of hierarchy nodes via spreadsheet upload
- Creating Library Elements via Spreadsheet Upload
- Creating Documents via Spreadsheet Upload
- Importing a Process Scope from a Spreadsheet

Note: The selective data transfer only allows for initial uploads of data from SAP Solution Manager to SAP Cloud ALM. Updating previously uploaded data by another upload is not possible.

Ensure that the XLSX files are uploaded in the correct format. Incompatible file formats can cause the upload to fail or lead to data misalignment.

Always verify the data structure before initiating the upload to avoid formatting issues that could disrupt the process.

5.1 Understand upload processing in SAP Cloud ALM

In the Selective Data Transfer (SDT) functionality of SAP Cloud ALM, a two-step upload process is implemented to validate and import content from SAP Solution Manager using Excel-based templates.

- **Step 1 – Dry Run (Validation Phase):**
  Upon uploading the Excel file, SAP Cloud ALM executes a dry run to validate file structure,

content integrity, and reference consistency. Errors or warnings are displayed directly to the end user if present.

- **Step 2 – Upload Execution (Backend Processing):**
  If the dry run completes without errors, the user can trigger the actual upload. The file is then transmitted to the backend system for processing. A progress indicator is shown in the frontend UI.

Potential Issue:
In certain situations—such as VPN interruptions, browser tab closures, or temporary loss of internet connection—the frontend loses its connection to the backend while the file is being processed. In this case:

- The upload *does not fail*.
- The file is *still processed in the backend as intended*.

However, the user may not see immediate feedback and mistakenly assume the upload did not proceed, potentially leading to a **second upload** and **duplicate content** in Cloud ALM.

How to Proceed After Upload Trigger

After you perform a successful **Dry Run** and choose to **Upload** the validated SDT file:

- **Wait for Backend Processing to Complete**
  Once you confirm the upload, the system initiates the backend import. This process may take **a few minutes**, depending on file size and server load.
- **Do Not Re-upload the File**
  Even if the frontend:
  - Temporarily shows no progress,
  - Appears to “hang,” or
  - Loses connection to SAP Cloud ALM (e.g., due to VPN timeout),

Do not trigger the upload immediately again.

Check Import Results After a Few Minutes

- Reopen the SDT upload page
- The imported data will appear **once the backend processing is finished.**

Duplicate Prevention
If you upload the same file again:

- Entities with the same External Reference ID may be rejected or lead to inconsistent behavior.
- Always wait until you verify whether the first upload completed before retrying.

Recommendation for Stable Upload

- Ensure a **stable internet/VPN connection** when triggering the upload.
- Avoid closing the browser or tab immediately after triggering the upload.

- Consider documenting the **date and time** of your upload for traceability.

5.2 Data validation and Error handling

Before uploading, SAP Cloud ALM performs a data validation check. Errors prevent the upload.

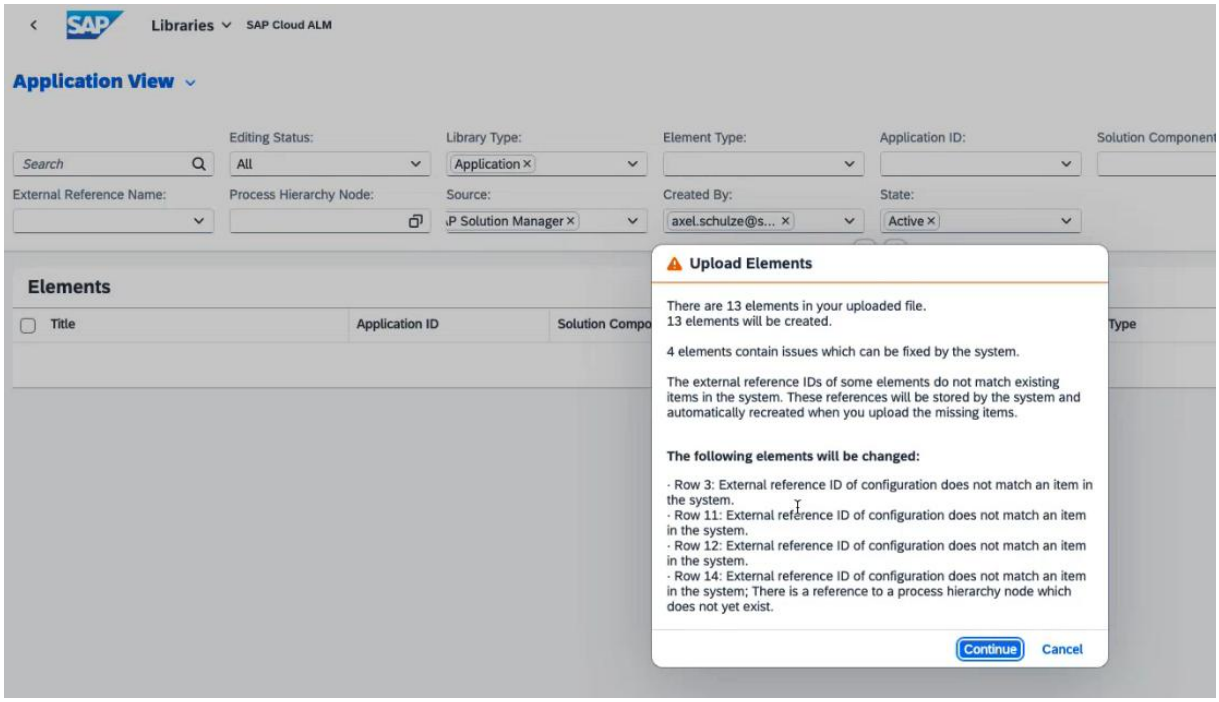


Figure 25: Example warning / errors during upload

You must review any validation issues before you attempt the upload again.

Partial Uploads and Rollback

If an upload fails at some point, SAP Cloud ALM may partially upload the data. In such cases, it's crucial to identify and rectify the issues that caused the failure and then complete the upload for the remaining data.

SAP Cloud ALM does not roll back partial uploads and users must manually resolve any incomplete data states.

Error Logs

Detailed error logs are generated during the upload process, providing insights into any issues encountered. These logs are valuable for troubleshooting. Review them thoroughly. Regular monitoring of these logs can help prevent recurring errors and improve the overall upload process.

Manual Corrections

In cases where errors are not automatically resolved by the system, manual corrections may be necessary. This could involve adjusting the data directly in SAP Cloud ALM or in the source file before attempting the upload again.

Ensure that all corrections are accurately documented to avoid further complications in future uploads.

If you encounter an error or warning message during an upload to SAP Cloud ALM, follow these steps to troubleshoot:

1. Copy the entire message content that is provided for every row.
2. Create an error sheet:
    a) Open your uploaded spreadsheet file.
    b) Add a new sheet and name it "Error".
    c) Paste the copied error or warning messages into column A.
    d) Go back to the data sheet in your spreadsheet file.
    e) Find the first empty column where you can input a formula.
    f) Optional name the column “Error”.
3. Apply the formula:
    - For a European Microsoft Excel format, paste the following formula in the empty column:
      `=IFERROR(INDEX(Error!$A:$A;MATCH("Row " & ROW() & ":"; LEFT(Error!$A:$A; FIND(":"; Error!$A:$A)); 0)); "")`
    - For a US MS Excel format, use:
      `=IFERROR(INDEX(Error!$A:$A,MATCH("Row " & ROW() & ":", LEFT(Error!$A:$A, FIND(":", Error!$A:$A)), 0)), "")`

    This is a valid and robust formula to extract messages from **Error sheet** into **Sheet1**, based on the row numbers.
    Here's a breakdown of how it works, in case you need further insights:

    1. `ROW()`
    What it does: returns the current row number of the formula's cell.
    Example: If the formula is in row 5, `ROW()` returns 5.
    2. `"Row " & ROW() & ":"`
    What it does: constructs a search pattern for the current row.
    Example: If `ROW()` returns 5, this part becomes `"· Row 5:"`.
    3. `FIND(":", Error!$A:$A)`
    What it does: finds the position of the first colon (:) in each cell of `Error!$A:$A`.
    Why: identifies the boundary where the `"· Row X:"` prefix ends.
    4. `LEFT(Error!$A:$A, FIND(":", Error!$A:$A))`
    What it does: extracts the portion of each cell in `Error!$A:$A` from the start to the first colon (:).
    Why: isolates the `"· Row X:"` part from each message in `Error!$A:$A`.
    5. `MATCH("Row " & ROW() & ":", LEFT(Error!$A:$A, FIND(":", Error!$A:$A)), 0)`

What it does: finds the position (row) in `Error!$A:$A` where the constructed `"· Row X:"` pattern matches the extracted prefix from `LEFT(...)`.

0: Indicates an exact match is required.

Example: If `Error!$A3` contains `"· Row 5: Message Text"`, this will return 3 when searching for `"· Row 5:"`.

6. `INDEX(Error!$A:$A, ...)`

What it does: retrieves the value (full message) from `Error!$A:$A` at the row position found by `MATCH(...)`.

Example: If `MATCH(...)` returns 3, `INDEX(Error!$A:$A, 3)` retrieves the value in `Error!$A3`.

7. `IFERROR(..., "")`

What it does: ensures that if no match is found (e.g. no message for the current row), the formula returns an empty string (`""`) instead of an error.

This helps you to identify and match the errors or warnings in your data sheet, making it easier to pinpoint and resolve issues.

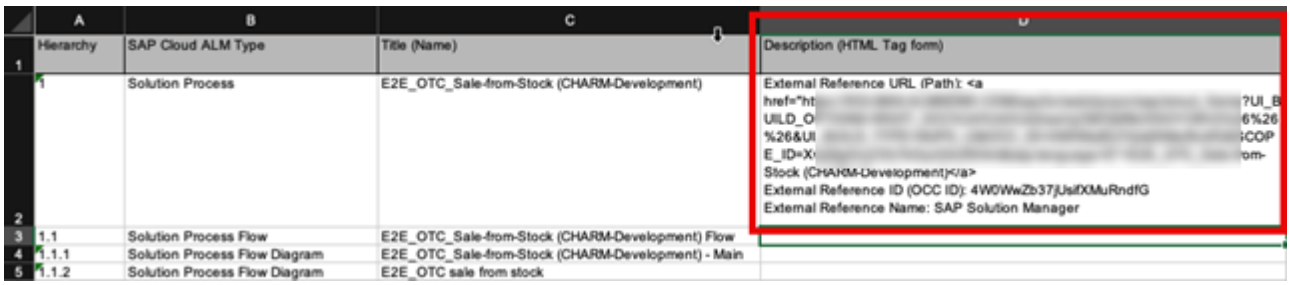
Tip: Use description fields in in the spreadsheet to include important information, e.g. External References Name, ID, Link, etc.

In the spreadsheet, fields like External Reference ID, External Reference Source, and External Reference Link help you to verify uploaded data. However, these fields are not visible in the SAP Cloud ALM UI after transfer. To ensure you can track and validate their migrated data, this information can be manually added to the description fields in the spreadsheet before the upload.

How to include important information in description field:

1. Ensure that you enable the *Description* column for your download file in SAP Solution Manager.
2. Download and open the spreadsheet file.
3. Locate the *Description* column.
4. Add external reference information.
5. Fill in the description field with relevant external reference data, e.g. External Reference ID: XYZ-12345; External Reference Source: Solution Manager; External Reference Link: https://solman.example.com/document123.
   Ensure consistency in formatting across all entries to improve readability.
6. Upload the spreadsheet to SAP Cloud ALM.

Although external reference fields aren’t visible in the UI, the data is stored within the description fields of each element.



	A	B	C	D
1	Hierarchy	SAP Cloud ALM Type	Title (Name)	Description (HTML Tag form)
2	1	Solution Process	E2E_OTC_Sale-from-Stock (CHARM-Development)	External Reference URL (Path): <a href="ht ?UI_B UILD_O 6%26 %26&UI COP E_ID=X om- Stock (CHARM-Development) External Reference ID (OCC ID): 4W0WwZb37jUsifXMuRndfG External Reference Name: SAP Solution Manager
3	1.1	Solution Process Flow	E2E_OTC_Sale-from-Stock (CHARM-Development) Flow	
4	1.1.1	Solution Process Flow Diagram	E2E_OTC_Sale-from-Stock (CHARM-Development) - Main	
5	1.1.2	Solution Process Flow Diagram	E2E_OTC sale from stock	

Figure 26: Example of description preparation in the spreadsheet

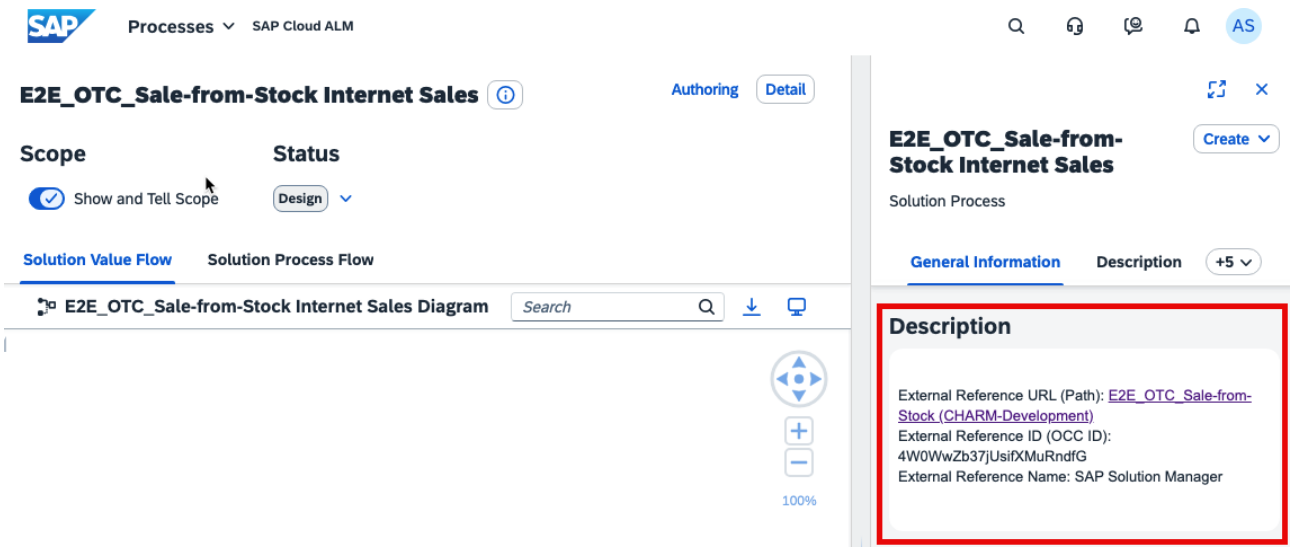


Figure 27: Example for description upload in solution process.

Tip: You can use spreadsheet formulas to fill descriptions automatically.

FAQ:

Limitations:

- Q: What are the general file limitations for selective data transfer?
  A: Files must not exceed 5MB in size and should contain no more than 10,000 lines. Files are automatically split in SAP Solution Manager during download.

General:

- Q: I've uploaded the process hierarchy, libraries, and process step libraries. However, I am not able to see them as a hierarchy model, like we see in SAP Solution Manager.
  A: The Hierarchy Assignment report is currently being enhanced to include libraries. This feature will be available soon.
  Q: What happens if a user is created with their email address only after the Test Management data upload?
  A: The email address from the upload is stored, but the user will appear as "Former Member"

until they become active in the system. A warning is shown to inform the customer of this status.

6 Performing the Selective Data Transfer

The transfer is broken down into the following essential steps:

1. Process hierarchy
2. Libraries
    a. Configuration
    b. Development
    c. Application
    d. Interface
    e. Solution activities
3. Process content
4. Test cases
5. Documents

By following these structured steps, you can successfully perform selective data transfers from SAP Solution Manager to SAP Cloud ALM. The process involves exporting data, modifying it to fit SAP Cloud ALM's requirements, and then uploading it using the generic upload function. Each step includes a *Limitations and FAQ* section to help you navigate any challenges you may encounter.

FAQ

Q: I received a ZIP file from SAP Solution Manager after running the selective data transfer. Can I upload it directly to SAP Cloud ALM?

A: ZIP file upload is currently only supported for solution processes in SAP Cloud ALM. Others, currently only supports direct MS Excel file uploads (XLSX) for the selective data transfer.
When the number of rows in a spreadsheet exceeds the defined limits, SAP Solution Manager automatically splits the data and generates a ZIP archive containing several files. In this case, you have to manually unzip the archive and upload the individual XLSX files, one by one.

Row limits per Excel file:

- Process Hierarchy: 10.000 rows
- Libraries: 1.000 rows
- Solution Activities (Process Steps): 10.000 rows
- Custom Solution Processes (Process Content): 10.000 rows per file
- Documents: 1.000 rows
- Test Cases (Test Steps): 500 test cases

6.1 Transferring the Process Hierarchy

1. Export your process hierarchy from SAP Solution Manager. For detailed instructions, see the Selective Data Transfer Guide.
2. Review and modify the data in the downloaded file.
3. Use the generic upload function in the **Process Hierarchy** app in SAP Cloud ALM to import the modified process hierarchy. For detailed instructions for this function, see Process Hierarchy and refer to the in-app help within the app.

FAQ

Q: Does the process hierarchy support more than 10 levels?

A: No, make sure that the hierarchy does not exceed 10 levels.

6.2 Transferring Libraries

6.2.1 Libraries in General

In SAP Cloud ALM, library handling is more streamlined compared to SAP Solution Manager.

In general, libraries organize re-usable elements or capabilities in dedicated library types. You can maintain the following library types in SAP Solution Manager and SAP Cloud ALM:

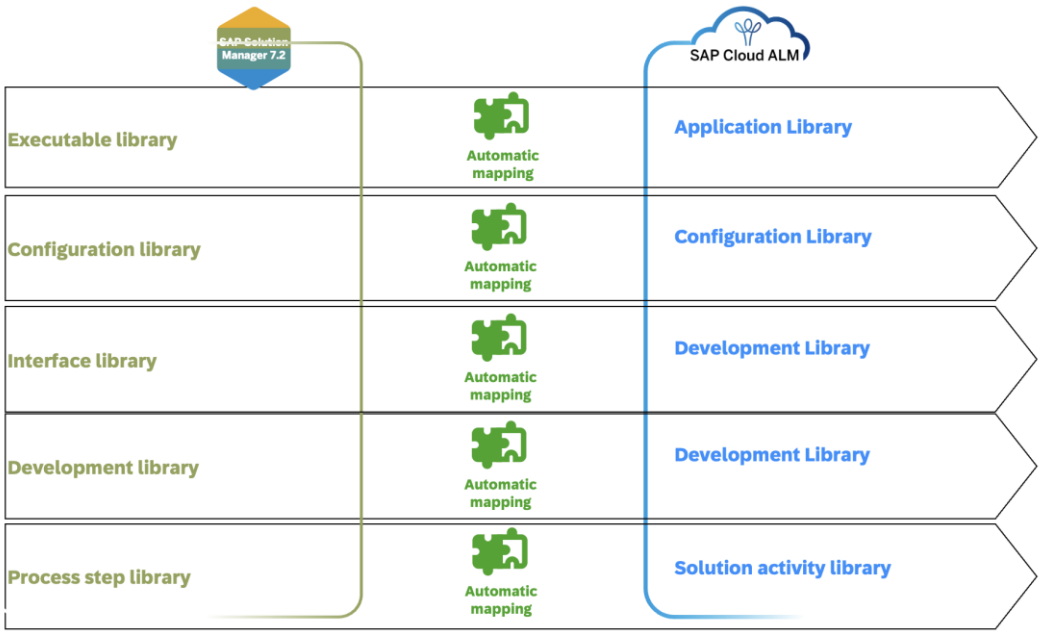


Figure 28: Selective data transfer for Libraries

Ultimately, business processes are assembled from re-usable library elements in their exact original purpose. When building up the libraries, each library element should only exist once. If the same element is used multiple times, it should be reused. By reusing the elements double documentation can be avoided.

In SAP Solution Manager, library elements can be reused in their exact original purpose but also with adjustments. This often leads to inconsistencies for library element names (e.g. process steps) and assignments (e.g. executables). Therefore, adjustments aren’t supported in SAP Cloud ALM.

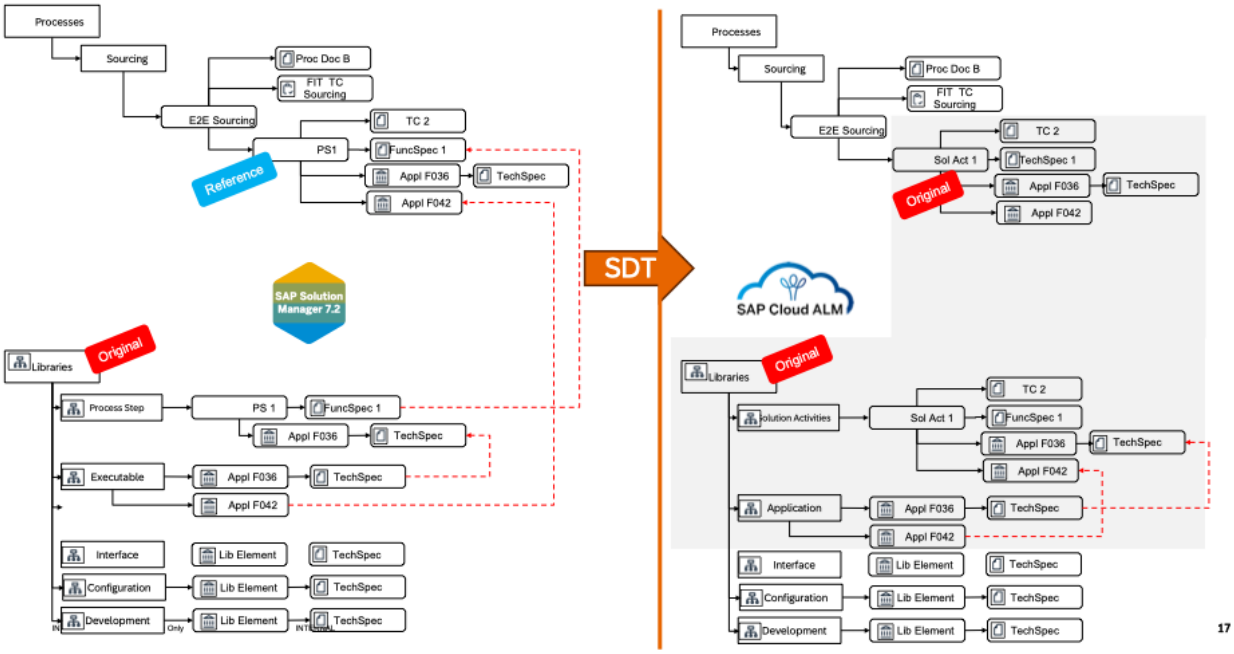
The selective data transfer for libraries ensures that all library references (configuration, development, executable, process step, and interface) are resolved to their original elements. Furthermore, it supports harmonizing the assignments (e.g. documents) between library originals and references from SAP Solution Manager. It also ensures that the structure and relationships between different artifacts remain consistent and reusable.

6.2.2 Application (Executable) Library

The Application Library in SAP Cloud ALM is part of a set of structured libraries that represent key elements of a system group. It contains executable applications—such as Fiori apps, transactions, or external URLs—that can be reused across various lifecycle management activities like test cases, tasks, and process modeling. Each library entry is associated with a specific system group, enabling targeted and consistent usage in the context of that system landscape.

Uniqueness of Library Elements

To maintain data integrity and avoid duplication, SAP Cloud ALM enforces uniqueness constraints on library elements within a system group. Specifically, for the Application Library, the combination of System Group + Title must be unique. SAP Cloud ALM doesn’t accept two entries with the same combination – even if they differ in other attributes like Fiori Action. This approach ensures a clean and manageable library structure, though it may require adaptations when transitioning from environments that allow an identification via more characteristics, like SAP Solution Manager.



Libraries handling in selective data transfer

Note: The simplified library concept in SAP Cloud ALM makes it easier to maintain and scale process documentation across an organization.

6.2.3 Perform the selective data transfer for libraries:

1. Export the library elements from SAP Solution Manager. For detailed instructions, see the Selective Data Transfer Guide.
2. Optional: Organize and modify the library elements in the spreadsheet file. Ensure that all required fields are correctly populated and that unnecessary elements are removed.
3. Upload the adjusted library data to SAP Cloud ALM. For detailed instructions for this function, see Creating Library Elements via Spreadsheet Upload.

FAQ

General

- Q: What to do if I get the error “Enter a valid system group”?
  A: Create a system group before the upload. For more information, see Landscape Management.
- Q: Why does SAP Cloud ALM reject certain entries for libraries?
  A: Other than SAP Solution Manager, SAP Cloud ALM doesn’t accept duplicate combinations of logical component groups (system group) and title.
- Q: What happens if documents are assigned to references instead of the original process steps?

A: If documents are assigned to references, they will be automatically linked to the original process steps when downloaded. The selective data transfer merges these assignments and the document will be shown in SAP Cloud ALM on the solution activity.

Configuration

- Q: What happens to Building Blocks from SAP Solution Manager during the selective data transfer?
  A: SAP Cloud ALM doesn't support Building Blocks. During the data transfer, they are automatically converted into Configuration Units, since Building Blogs represent a functional subset of Configuration Units and can be mapped without loss of functionality. This preserves all relationships and content.
  To help distinguish original Configuration Units from converted Building Blogs, a message is added to the export file.

Development

Application

- Q: Why can't Job Documentation be transferred to SAP Cloud ALM?
  A: Selective data transfer doesn't support Job Documentation because SAP Cloud ALM doesn't provide a dedicated job documentation library. Instead, SAP recommends using the *Documentation* app in SAP Cloud ALM.

Interface

- Q: Are interface details from SAP Solution Manager transferred and available in SAP Cloud ALM after the data transfer?
  A: Not in the same way. Interface details are included in the export from SAP Solution Manager if they exist—typically as part of the configurations of Interface Monitoring or Interface Discovery. However, SAP Cloud ALM currently doesn't support a dedicated "Interface Details" object. Instead, the interface details from SAP Solution Manager are uploaded as descriptions for the corresponding interface entries in the interface library of SAP Cloud ALM.

6.3 Transferring Solution Activity (Process Step) Library, Processes and Diagrams

6.3.1 Perform Selective Data Transfer for Solution Activity (Process Step) Library

The Solution Activity Library is located in the *Process Authoring* app because it provides the reusable tasks (activities) used to design and maintain processes. Keeping it within process authoring ensures that all relevant content needed for the modeling and updating processes is centrally accessible in one place.

1. Export the library elements from SAP Solution Manager. For detailed instructions, see the Selective Data Transfer Guide.

2. Optional: Organize and modify the library elements in the spreadsheet file. Ensure that all required fields are correctly populated and that unnecessary elements are removed.
3. Upload the adjusted library data to SAP Cloud ALM. For detailed instructions, see SAP help Importing Solution Activities

6.3.2 Perform Selective Data Transfer for Solution Processes

1. Export the process content, which includes detailed process steps and associated data, from SAP Solution Manager. For detailed instructions, see the Selective Data Transfer Guide.
2. Review and clean up the process content in the downloaded file. Make sure that all necessary fields are populated and irrelevant data is excluded.
3. Upload the process content into SAP Cloud ALM using the generic upload function. For detailed instructions, see SAP help Importing Custom Solution Processes

FAQ

- **Q: The diagram contains renamed solution activities, which prevents it from being uploaded.**
  A: The reason is that in SAP Solution Manager the names of the process steps <ORG> and <REF> are different, which is not supported by SAP Cloud ALM. To solve the issue in SAP Solution Manager, go to the process step <ORG>, open the context menu, and select *Distribute Changes to References*. Select all line items and choose *ok* to synchronize the names. You can also do a mass selection.
  Note: For mass changes, the *Distribute Changes to References* feature in Solution Documentation was missing in the *List* view context menu due to a functional gap. This has been resolved via support note https://me.sap.com/notes/3554339.

- **Q: What happens when renamed solution activities are used in diagrams during the selective data transfer?**
  A: If you upload solution activities first and after that you upload the diagrams referencing renamed solution activities, those diagrams are not created. However, if the ZIP file is uploaded first without a prior upload of solution activities, all diagrams are created using the occurrence names. Later uploads of renamed solution activities that are already referenced in diagrams are ignored.

- **Q: Why is only one diagram per process variant exported from SAP Solution Manager to SAP Cloud ALM?**
  A: SAP Solution Manager allows multiple diagrams to be assigned to a single process variant. However, SAP Cloud ALM only supports one diagram per variant. Therefore, during the export, only the first assigned diagram is transferred. Additional diagrams are not included in the export or visible in SAP Cloud ALM. To ensure the correct diagram is transferred, make sure

the desired diagram is defined as the first one in the list in SAP Solution Manager before you start the export.

- **Q: Why is the system symbol missing in diagrams transferred from SAP Solution Manager to SAP Cloud ALM via SDT?**
  A: SAP Cloud ALM only supports BPMN-compliant diagrams. If your diagram in SAP Solution Manager includes elements that are not part of the BPMN standard—such as the system symbol used in non-BPMN contexts—these elements will not be transferred during the SDT upload.

6.4 Perform the scoping

Scoping in SAP Cloud ALM is a crucial prerequisite for the selective data transfer, particularly to transfer test steps and documents. Without proper scoping, the uploaded processes and related artifacts from the data transfer can't be assigned or utilized correctly during the upload of test cases and documents. More under SAP Cloud ALM: Projects and Scopes.

How to perform the scoping to define which processes are managed in the data transfer:

1. On the SAP Cloud ALM launchpad, choose *Implementation* tab → *Manage Scopes*.
2. Make sure you are in the right project for the selective data transfer.
3. Choose your previously created scope for the selective data transfer and choose *Edit*.
4. Under *Solution Scenarios*, activate the *Custom* scenario.
5. Save your changes.
6. Choose *Process Scoping* at the top right to navigate to the *Open Solution Processes* view. Make sure that your custom solution processes are visible. They should include the process hierarchy, libraries, process steps, tags, and owner that were uploaded during the first steps of the selective data transfer.
7. You can use filters to quickly find specific processes based on tags, user, or date.
8. In the *Scope* column, use the toggle to include processes into your scope. Alternatively, choose *Edit Scope* and use the multi-select feature (checkboxes) to select several business processes.
9. Choose *Mass Edit* and change scope state to "in Scope".

6.5 Transferring Documents

Overview

The selective data transfer helps you to migrate documents from SAP Solution Manager to SAP Cloud ALM. The process includes different options, depending on the available case:

Use Case	Description	Pros	Cons

1. Documents remain in SAP Solution Manager	Documents stay in SAP Solution Manager; only metadata is transferred to SAP Cloud ALM, linking back to URLs in SAP Solution Manager.	Fast and easy, keeps SAP Solution Manager structure.	Requires SAP Solution Manager to stay active for access.
2. Documents are moved to an external storage, such as Microsoft SharePoint	Documents are exported from SAP Solution Manager and uploaded to an external storage. Metadata is updated in SAP Cloud ALM, with new document URLs.	Avoids reliance on SAP Solution Manager, supports various DMSs.	Manual effort required for updating links.
3. Documents are transferred to the Document Management System (DMS), on SAP BTP	Documents will be directly transferred and integrated into the DMS, for full cloud-based document storage. This is not available yet but planned for long-term document management in SAP Cloud ALM.	Full ALM integration, automation planned.	On roadmap.

6.5.1 How to Transfer Documents in Use Case 1 (Documents remain in SAP Solution Manager)

Overview

In use case 1, you keep your documents stored in SAP Solution Manager, while transferring metadata to SAP Cloud ALM. This ensures that documents remain accessible via links without physically migrating them.

- Best for: Customers who want to continue using SAP Solution Manager for document storage.
- Outcome: Documents appear in SAP Cloud ALM, but the actual files remain in SAP Solution Manager.

Step-by-Step

1. Export all relevant document header data from SAP Solution Manager. For detailed instructions, see the Selective Data Transfer Guide.
2. Make sure that the document references are accurate and that document attributes are consistent. In the downloaded file, verify and optionally modify these details.

3. Upload your documents to SAP Cloud ALM using the generic upload function. For detailed instructions for this function, see SAP help Creating Documents via Spreadsheet Upload
4. Repeat this process for multiple documents to confirm successful migration.

FAQ Documents

- Q: Why is the document description from SAP Solution Manager not appearing in SAP Cloud ALM?
  A: The description from SAP Solution Manager isn't automatically transferred to SAP Cloud ALM because it's treated as an optional attribute. To import descriptions, export the document description from SAP Solution Manager with the *# Description* column. Before the upload to SAP Cloud ALM, ensure that this column header is changed to *Content*. This change enables the upload to be recognized correctly.
- Q: Can I access SAP Solution Manager documents via URL without requiring a user login?
  A: Yes, SAP Solution Manager can be configured to allow document access without requiring individual user authentication. This setting typically involves assigning a service user with specific permissions. You can view documents in SAP Solution Manager through a specific URL format.
- Q: Why do I receive an error when uploading a document or test case if it already exists in another project or scope in SAP Cloud ALM?
  A: In SAP Cloud ALM, the combination of *External Reference Name* and *External Reference ID* must be unique across the entire SAP Cloud ALM tenant—not just within a single project or scope. This means:
  - You cannot upload a document or test case with the same external reference ID and name if it already exists in another project or scope.
  - Titles are not unique and do not cause errors—you can have multiple documents with the same title in different projects.

  This behavior ensures consistency and prevents duplication across SAP Cloud ALM. It is especially relevant during Selective Data Transfer from SAP Solution Manager.

6.5.2 How to Transfer Documents in Use Case 2 (Moving Documents to External Storage)

Overview

In use case 2, you physically move documents from SAP Solution Manager to an external Document Management System (DMS), such as Microsoft SharePoint or Google Drive. The metadata is then updated in SAP Cloud ALM to point to the new storage location.

- Best for: Customers planning to retire SAP Solution Manager or using Microsoft SharePoint or another DMS for document storage.

- Outcome: Documents are now stored in an external DMS, and SAP Cloud ALM references the new document locations.

Step-by-Step

1. Export all relevant document content from SAP Solution Manager. For detailed instructions, see Selective Data Transfer Guide.
2. Upload documents to external storage, such as Microsoft SharePoint.
3. Use replace KW URLs function in SAP Solution Manager. For detailed instructions, see Selective Data Transfer Guide.
4. Continue by following the steps in Use Case 1.

6.5.3 How to Transfer Documents in Use Case 3 (Integration with SAP BTP DMS)

In use case 3, documents from SAP Solution Manager are directly migrated into the SAP BTP Document Management System (DMS), providing a fully integrated cloud storage solution for SAP Cloud ALM. Key Benefits:

- Eliminates reliance on an external DMS, such as Microsoft SharePoint.
- Seamless document integration with SAP Cloud ALM.
- Automated version control and history tracking.
- Better security and access management within SAP ecosystem.

If you plan to fully adopt use case 3 in SAP Cloud ALM, monitor the SAP Cloud ALM Roadmap for updates on the DMS availability.

6.6 Transferring Test Cases

Overview

Selective Data Transfer (SDT) supports the export of Test Cases created with the Test Step Designer in the Focused Build add-on in SAP Solution Manager 7.2. The exported data is automatically structured to match the expected input format of the Test Cases in Test Preparation app in SAP Cloud ALM.

Each test case and its associated steps are transferred along with relevant metadata and references. Relationships between entities are preserved using external reference IDs, enabling full reconstruction in Cloud ALM.

Step-by-Step

5. Export all relevant Test Case (Test Step) content from SAP Solution Manager. For detailed instructions, see SAP Solution Manager 7.2 - Selective Data Transfer Guide.
6. Optional: Manage Test Step attachments. For detailed instructions, see SAP Solution Manager 7.2 - Selective Data Transfer Guide.

7. Upload your Test Case (Test Step) content to SAP Cloud ALM using the generic upload function. For detailed instructions for this function, see Uploading Manual Test Cases.
8. Repeat this process for multiple Test Case (Test Step) files to confirm successful migration.

7 Verifying Uploads Using Analytics in SAP Cloud ALM

After uploading content via the selective data transfer, you can use SAP Cloud ALM's analytics tools to verify that your data was imported correctly and completely. The following apps are particularly useful:

Process Hierarchy Assignment App

Use this app to review the structure of your uploaded solution. It shows how processes are organized within your solution and helps you to confirm that the hierarchy matches the exported data. You can verify whether all expected process elements are assigned correctly. More under Process Hierarchy Assignments.

Solution Traceability App

With this app you can trace the relationships between different entities in your solution, such as processes, requirements, and test cases. After an upload, it helps you ensure that these relationships are preserved and that all references have been correctly transferred. More under Solution Process Traceability.

These tools provide transparency and control over your data transfer results, enabling you to quickly identify any discrepancies and take corrective actions if necessary.