

Implementation Tools: Quick Copy

SAP Business One
Release 9.0



In this topic, we will look at how to select and copy information between SAP Business One company databases.

Objectives



Objective:

- Select and copy records between SAP Business One company databases

This topic covers the use of the Quick Copy tool during an implementation project. On completing this topic, you will be able to select and copy records between SAP Business One company databases.

Business Scenario



SW Doors and Windows has three trading entities which are implemented as three separate company databases.

All three databases require the same customizations, including user-defined data, reports, and configuration settings.

Solution: Make the common customizations on one company database, then use Quick Copy to export them to the other company databases.

A customer has three distinct trading entities which are being implemented as three separate company databases. All three databases require the same customizations, including user-defined fields and tables, customized reports, and standard configuration settings.

Solution: Customizations can be copied from one company to another using the Quick Copy tool.

Implementation Center

Administration > System Initialization > Implementation Center > Implementation Tasks > Copy Data Between Companies

Implementation Tasks



- Express Configuration Wizard
- DTW
- Solution Packager
- **Quick Copy**

Implementation Project



- Project Plan templates (with embedded configuration screens)

Configuration Management



- Saved configuration settings
- Compare saved configurations

Path Settings



- Folder locations for use with tools

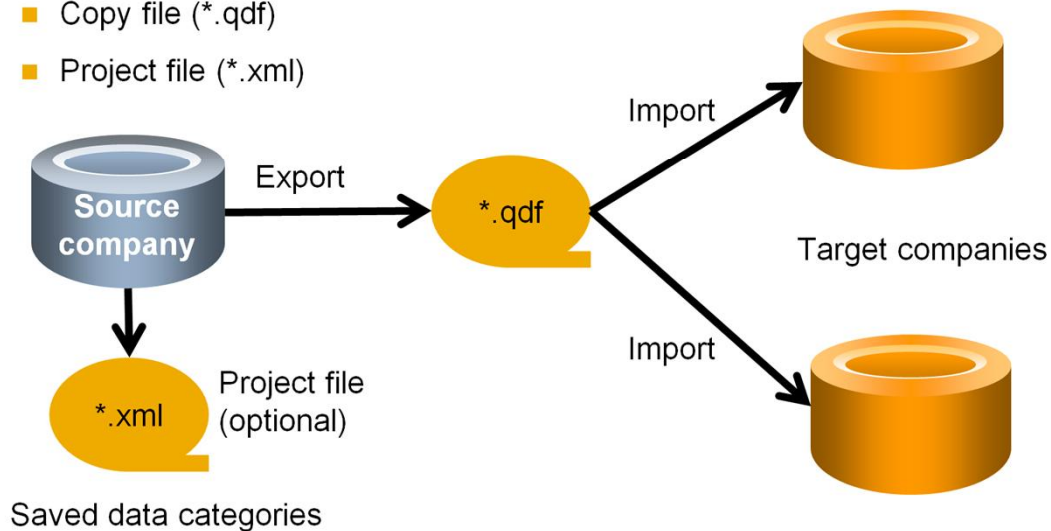
Quick Copy is one of the tools provided in the Implementation Center in SAP Business One.

To launch Quick Copy, choose *Administration > System Initialization > Implementation Center > Implementation Tasks*. Then choose *Copy Data Between Companies*.

Note that, unlike previous releases of SAP Business One, the Quick Copy tool is part of the core application in release 9.0 and is installed automatically with the SAP Business One server.

Quick Copy Overview

- Selectively copy data records between company databases of same localization
- Uses two file formats:
 - Copy file (*.qdf)
 - Project file (*.xml)



Quick Copy is a very useful tool during an implementation project. It allows you to selectively copy data records between company databases. For example, you can copy master data or customizations to a test database for testing and validation. Or you can copy configuration settings from one company entity to a different company entity. Note that this is not a full database copy. You still need to maintain full database backups for recovery purposes.

Quick Copy saves the copied data records in a file with the extension .qdf. Using Quick Copy, you can import this file into another company database.

You can optionally save an XML project file containing the saved data categories. This file can be opened in the tool and can save time if you repeatedly need to export the same types of data.

Using Quick Copy

- Data categories are blocked from selection until you select the settings on the right-hand side
- The data categories become selectable after settings are saved

Quick Copy

Source: OEC Computers UK
Target:

Data Categories

- ☐ Customization
- ☐ Administration
- ☐ Financials
- ☐ Business Partners
- ☐ Inventory
- ☐ Human Resources

Categories are initially blocked for selection

Source or Target

☐ Copy to File
☐ Copy from File

Copy Method

☐ Add New Records and Update Existing Records
☐ Add New Records Without Updating Existing Records
☐ Update Existing Records Without Adding New Records
☐ Delete All Records Then Add New Records

Error Handling

☐ Ignore All Errors and Copy Valid Records
☐ Errors Terminate the Copy Process

If Target Records Are Missing UDFs

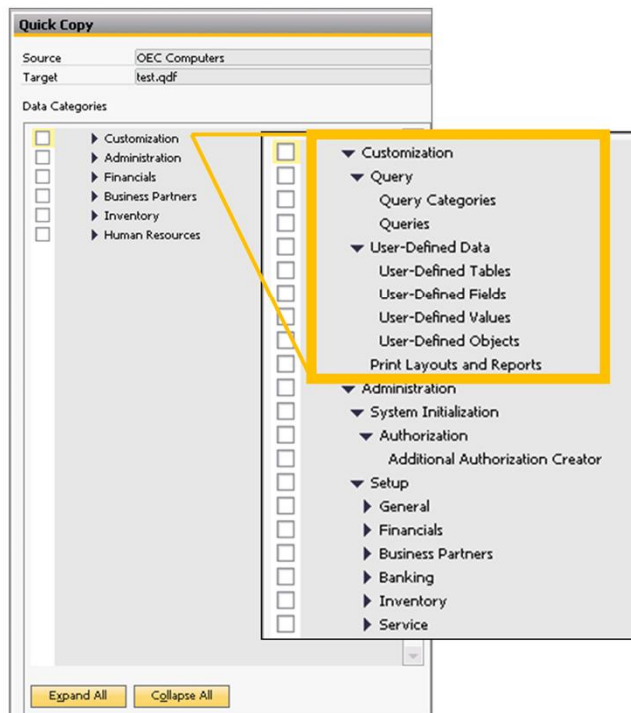
When you open the Quick Copy screen you can see the data category hierarchy on the left-hand side of the screen. The categories are initially blocked for selection until you select the required settings on the right-hand side of the screen:

- Select the function (Copy to File for export, Copy from File for import) and file name.
- Select the copy method (this applies only for import).
- Set options for handling errors.
- Select the copy options (for import only).

Once you have made these settings, and choose OK, the data categories on the left-hand side of the screen will open up for selection.

Using Quick Copy (Cont.)

- Categories are shown in a tree structure that aligns with SAP Business One menu structure
- Expand tree to view and select objects within a category's structure



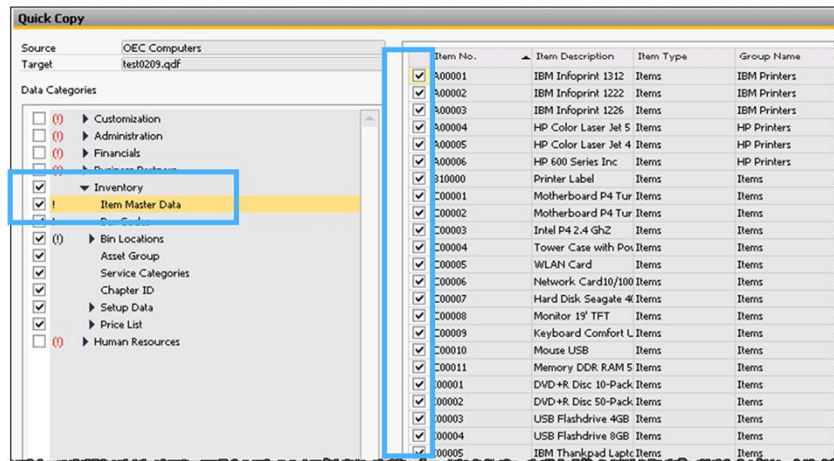
You select data from a category tree structure that aligns with the SAP Business One menu structure. Note that the structure does not change from company to company.

The categories cover customizations (including queries and reports), administration and configuration settings, financial settings, business partner master data, inventory (including item master data and price lists), and human resource master data.

You can drill-down the tree structure to view and select objects within a category structure.

Using Quick Copy (Cont.)

- You can select any object in a category's tree structure for copy
- When you select a top level category, all objects within the tree are selected, but can be individually deselected
- When you select an object at the lowest level in a category, the system will display the detailed records in the right-hand pane



You can select any object in the category's tree structure for the copy.

When you select the top level of a category, all the objects within the category's tree structure are also selected for copy. You can individually deselect objects in the tree that are not required for copy.

When you select an object at the lowest level in a category, the system will display the detailed records for the object in the right-hand pane. This is shown in the graphic for the Item Master Data category.

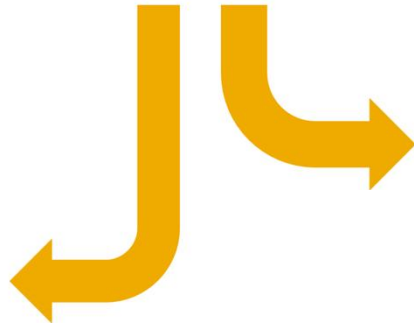
The records are selected by default, but you can deselect individual records not required for the copy.

When you later import the copy file to another company, you have the option to select categories or individual records from the data copy file.

Dependent Categories



Inventory > Item Master Data

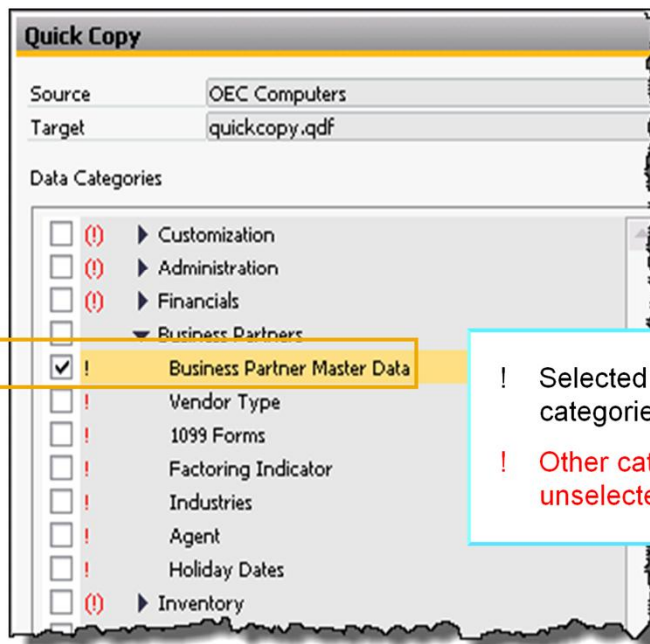


☐ Business Partner Master Data
BP Groups

☐ Item Groups
Price Lists
Customs Groups
Manufacturers
etc.

When you select a category, there might be data dependencies on other categories. For example, the item master data category has dependencies on business partner master data (vendors or resellers) as well as item groups and price lists.

Dependent Categories (Cont.)



The screenshot shows the 'Quick Copy' tool interface. At the top, 'Source' is 'OEC Computers' and 'Target' is 'quickcopy.qdf'. Below, 'Data Categories' are listed with checkboxes and dependency indicators. 'Business Partner Master Data' is selected (checked box, black exclamation mark). Other categories like 'Customization', 'Administration', 'Financials', 'Business Partners', 'Vendor Type', '1099 Forms', 'Factoring Indicator', 'Industries', 'Agent', 'Holiday Dates', and 'Inventory' are unselected (unchecked boxes, red exclamation marks). A callout box highlights the selected category with the text: '! Selected category is dependent on other categories' and '! Other categories are dependent on this unselected category'.

- Quick Copy indicates possible dependencies on other categories
- Marked dependencies are provided as a warning

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The Quick Copy tool will indicate possible dependencies on other categories. These dependencies are derived from the database table structure, and not from the actual data records to be copied, and are therefore provided as warning not an error.

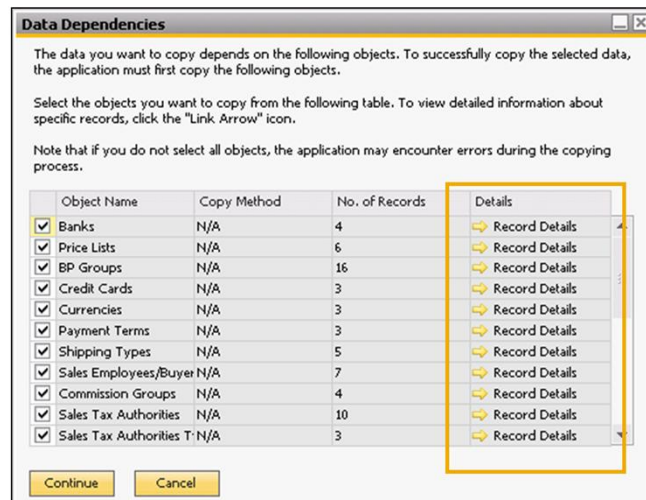
In the example shown, the Business Partner Master Data category is selected:

- A *black* exclamation mark '!' indicates that a selected category is dependent on other data categories.
- A *red* exclamation mark '!' indicates for an unselected category that other categories are dependent on this unselected category. In the example, the unselected category Vendor Type has this indicator.

When you see a category marked with parentheses '(!)', this indicates that the dependencies are deeper in the category structure. You can expand the category to see the dependent objects within its structure.

Viewing Dependent Records

- During the copy process, the system displays real dependent objects dynamically derived from the data records to be copied
- Dependent objects are automatically selected for copy with the other data
- Links provided to view dependent records
- If you deselect a dependent object, copy may fail



After you have selected the categories, choose Export to start the copy.

During the copy process, the system displays the real dependent objects, dynamically derived from the data records to be copied. These dependent objects are automatically selected for copy with the other data.

Links are provided to view the dependent records, enabling you to decide whether to include them in the copy.

Be aware that if you deselect a dependent object, the copy may fail.

Copy Log

■ Full log with link to copied records

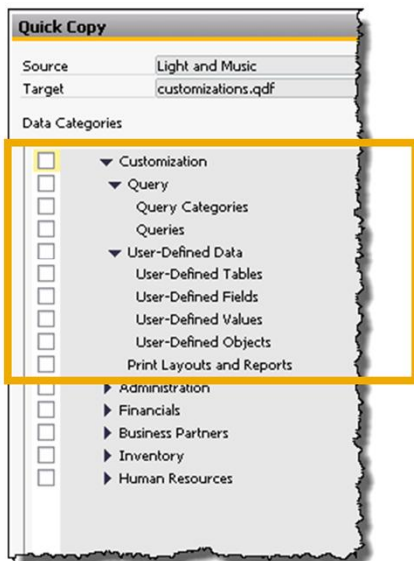
Quick Copy Log Category Details			
Data Categ...	Object Name	Number of Records Copied	Number of Records Failed
Administration	Currencies	3	0
Administration	Dunning Terms	1	0
Administration	File Formats	2	0
Administration	House Bank Accounts	4	0
Administration	Languages	1	0
Administration	Payment Methods	9	0
Administration	Payment Terms	3	0
Administration	Sales Employees/Buyers	7	0
Administration	Sales Tax Authorities	10	0
Administration	Sales Tax Authorities Type 3	0	0
Administration	Sales Tax Codes	7	0
Administration	Shipping Types	5	0
Administration	States	10	0
Business Partners	Business Partner Master D:	38	0
Business Partners	Holiday Dates	1	0
Customization	Queries	2	0
Customization	Query Categories	2	0
Customization	User-Defined Fields	11	0
Customization	User-Defined Tables	3	0
Customization	User-Defined Values	7	0
Inventory	Price Lists	6	0

Quick Copy Log Instance Details - Business Partner Master Data			
Record Key/Insta...	Result	Description	H
C50000	Copied successfully		
C60000	Copied successfully		
C65300	Copied successfully		
C70000	Copied successfully		
C99998	Copied successfully		
C99999	Copied successfully		
L10001	Copied successfully		
L10002	Copied successfully		
V10000	Copied successfully		
V10001	Copied successfully		
V20000	Copied successfully		
V23000	Copied successfully		
V30000	Copied successfully		
V50000	Copied successfully		
V60000	Copied successfully		
V70000	Copied successfully		

After the copy, the system provides a full log record of the records copied, together with a link to the copied records.

In the example, shown, we can see the number of records copied for the Business Partner Master Data category. And we can drill-down to see the codes of the master data records.

Quick Copy Restrictions



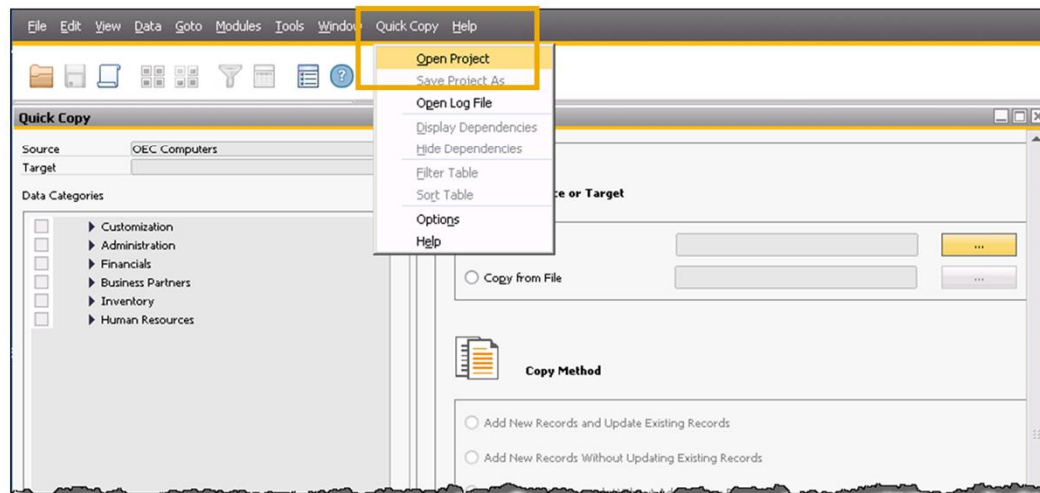
- Source and target companies must have same localization and version
- Only Customization category can be copied to a different localization:
 - Queries
 - Query categories
 - User-defined Tables
 - User-defined Fields
 - User-defined Values
 - User-defined Objects
 - Print Layouts and Reports

The source and target companies must have the *same* localization, and run on the same version of SAP Business One.

If you need to copy records to a company with a different localization, the only category that can be successfully copied to a different localization is the *Customization* category. Therefore you can copy user queries and categories, user-defined data (UDTs, UDFs, UDV, UDOs), and print layouts and reports to a company with a different localization.

Using a Project File

- Option to save settings and selected categories in a project file
- To open the project file, choose *Quick Copy > Open Project*



After you have exported data to a file, the Quick Copy tool will prompt you to optionally save a project file. When you make frequent copies, a project file can save you time since the settings and data categories used in the previous copy operation are recorded in the project file.

The project file can be opened from the Quick Copy menu on the top menu bar. Choose *Quick Copy > Open Project* to open a saved xml project file.

Note that you can only open the project file on the company on which it was created. You can also save a project file when you import on the target company.

Import Settings

Copy Method

- ☐ Add New Records and Update Existing Records
- ☒ Add New Records Without Updating Existing Records
- ☐ Update Existing Records Without Adding New Records
- ☐ Delete All Records Then Add New Records

Error Handling

- ☐ Ignore All Errors and Copy Valid Records
- ☐ 1 Errors Terminate the Copy Process

If Target Records Are Missing UDFs

- Do Not Copy Records with Missing UDFs
- Copy Records and Ignore Missing UDFs

Copy Options

When Copying Objects with Accounts

When Copying Empty Fields

☒ Force Backup Before Starting Copy Process

■ Copy Method

■ Error Handling

■ Copy Options

When you import records, you need to select the copy method, error handling option, and copy options. The choice of these options may depend on the data that already exists in the target company.

The copy method can be chosen to:

- Add new records and update records with matching keys
- Add new records but not update records with matching keys
- Update records with matching keys without adding new records
- Erase all existing records in the target database and add new records

Import Settings (Cont.)

The screenshot displays the 'Import Settings (Cont.)' dialog box with three main sections:

- Copy Method**: Contains four radio button options:
 - ☐ Add New Records and Update Existing Records
 - ☒ Add New Records Without Updating Existing Records
 - ☐ Update Existing Records Without Adding New Records
 - ☐ Delete All Records Then Add New Records
- Error Handling**: Contains two radio button options:
 - ☐ Ignore All Errors and Copy Valid Records
 - ☒ Errors Terminate the Copy ProcessA text field labeled 'If Target Records Are Missing UDFs' is followed by a dropdown menu. The dropdown menu is open, showing two options: 'Do Not Copy Records with Missing UDFs' and 'Copy Records and Ignore Missing UDFs'.
- Copy Options**: Contains two dropdown menus:
 - 'When Copying Objects with Accounts' with 'Use Accounts in Source' selected.
 - 'When Copying Empty Fields' with 'Use Default Accounts in Target' selected.A checkbox labeled 'Force Backup Before Starting Copy Process' is checked.

The error handling choices govern the Quick Copy response to an error while copying the records. You can choose to:

- Skip the affected record and continue copying valid records, or
- Stop the copy process when the number of errors reaches a specified limit

If the records to be copied contain user-defined fields, the user-defined fields will be automatically selected for copy, since they are a dependent category. However, if the dependent category is deselected, you must choose whether to copy records if the user-defined fields are not present in the target company.

Import Settings (Cont.)

The screenshot displays the 'Import Settings (Cont.)' interface with three main sections:

- Copy Method:** Contains four radio button options:
 - ☐ Add New Records and Update Existing Records
 - ☒ Add New Records Without Updating Existing Records
 - ☐ Update Existing Records Without Adding New Records
 - ☐ Delete All Records Then Add New Records
- Error Handling:** Contains two radio button options:
 - ☐ Ignore All Errors and Copy Valid Records
 - ☒ Errors Terminate the Copy ProcessBelow these is a dropdown menu for 'If Target Records Are Missing UDFs' with two visible options:
 - Do Not Copy Records with Missing UDFs
 - Copy Records and Ignore Missing UDFs
- Copy Options:** Contains two dropdown menus:
 - 'When Copying Objects with Accounts' with 'Use Accounts in Source' selected.
 - 'When Copying Empty Fields' with 'Use Default Accounts in Target' selected.At the bottom is a checked checkbox: ☒ Force Backup Before Starting Copy Process.

In the copy options, you can set how to copy accounts and empty fields. Since objects such as item and warehouse data may contain assigned accounts, the copy option for accounts can be chosen to:

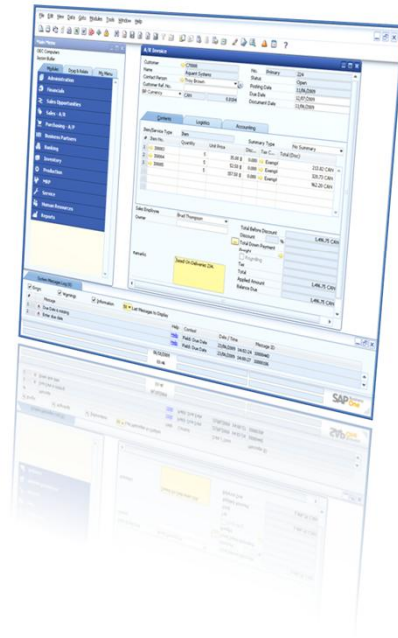
- *Use Accounts in Source* – If the source accounts also exist in the target, then the application copies the account assignments from the object in the source to the object in the target. However, if the source accounts do not exist in the target, then the application encounters an error during the copy process.
- *Use Default Accounts in Target* – The application assigns the default accounts in the target to the object, and does not copy the source assignments.

The copy option for empty fields can be chosen to:

- *Do Not Overwrite Target Fields and Keep Original Values* – If a field in the source is empty, then the application skips copying this field. The application keeps the original value of the corresponding field in the target, which remains the same before and after the copy process.
- *Overwrite Target Fields with Empty Values* – If a field in the source is empty, then the application removes the value from the corresponding value in the target.

You also have the option to enforce a backup before the import starts. If you select the *Enforce Backup before Copying* checkbox, the import will not proceed if the target database has not been backed up within two hours.

Demo



This demo will show how to copy data using the Quick Copy tool.

Key Points



Key points from this topic:

- Quick Copy allows you to selectively copy data records between SAP Business One company databases with the same localization and version. Quick Copy does not create a new company database.
- Several categories of data are supported for copying.
- The exported data records are saved in a file with the extension qdf.
- You can optionally save the selected categories and settings in an xml file, for subsequent use.
- When you select a category for export, Quick Copy automatically selects dependent objects for copying.
- Quick Copy is useful during implementations for copying customizations and configuration information, and master data, to a test system or to a different database for the same company.

Here are some key points to take away from this session.

- The Quick Copy tool allows you to selectively copy data records between SAP Business One companies with the same localization and version. Quick Copy does not create a new company database.
- The categories supported for copying include customizations, administration and configuration settings, financial settings, business partner master data, inventory, and human resource master data.
- The exported data records are saved in a file with the extension .qdf. Using Quick Copy, you can import this file into another company database.
- You can optionally save an XML project file containing the export settings as well as the saved data selections. This can save time if you repeatedly need to export the same types of data.
- When you select a category for copy, the Quick Copy tool automatically marks and selects dependent objects for copying. Links are provided to view the dependent records, enabling you to decide whether to include them in the copy.
- Quick Copy is useful during an implementation project for copying customizations and configuration information, or master data, to a test system or to a different database for the same company.

Thanks!

You have completed the topic for the
Quick Copy tool.
Thank you for your time!

You have completed the topic for the Quick Copy tool in SAP Business One.
Thank you for your time!

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