



ERP/CRM Integrator
Upgrade Guide

ERP/CRM Integrator Upgrade Guide

Revision: 18 Jul 2023

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https://productresources.collibra.com/docs/erp-crm-integrator/latest/Content/Upgrade/to_upgrade.htm

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Introduction

ERP/CRM Integrator 7.8 introduces a significant change in the way a BW system is represented in Collibra. This document describes how to approach upgrading an existing Collibra BW instance to work with ERP/CRM Integrator 7.8. There are also some steps to perform when upgrading an ERP system, though these are less than for a BW system.

In order to upgrade a ERP/CRM Integrator repository to ERP/CRM Integrator 7.8 the following areas are involved:

Source Type	(1) SAP ABAP Functions delivered by Transport	(2) Extract Source to load Files required	(3) Re-Load to ERP/CRM Integrator Repository required	(4) Reload to Collibra required
SAP ERP	Same as 7.5.5	no	no	no
SAP BW non HANA	Same as 7.5.5	no	yes	yes
SAP BW on HANA	New version for 7.8 required	yes	yes	yes
ERP (others)	n/a	no	no	no

While the upgrade steps 1-3 above are applicable to all upgrades from 7.5 to 7.8, the Collibra environments needs some additional steps and these are described in the following sections.

Upgrading to ERP/CRM Integrator 7.8

Preparation

- Make sure that all Physical Data Dictionaries (PDDs) are populated with the full set of Subject Areas from ERP/CRM Integrator 7.5.5. This is in order to ensure that the same export can be run again after the 7.8 ERP/CRM Integrator upgrade and the set of Subject Areas used will be the same.
- Unused PDDs should be deleted to make the upgrade process faster
- Backup the Collibra data!

Upgrade ERP/CRM Integrator and the Repositories

- Install ERP/CRM Integrator 7.8 and open each repository to be updated. ERP/CRM Integrator will manage the repository upgrade process
- Perform the steps 1-3 outlined in the Introduction
- Verify the contents within ERP/CRM Integrator before performing step 4

Prepare the Collibra Environment

Delete Attribute Types no longer required in ERP/CRM Integrator 7.8

- Remove the Attribute Type 'Column Type (ERP)'
- This will remove all the references to this Attribute Type from Assets and Scopes

Determine if Collibra BW PDDs need to be updated

If there are no existing PDDs in Collibra containing metadata exported from previous versions of ERP/CRM Integrator, then there is no need to perform further steps and the upgrade process to ERP/CRM Integrator 7.8 is completed.

Note To check if there is a need to perform further steps, look for Asset Types with the wildcard 'SAPBW'. If assets of such types exist then the upgrade steps of the following sections will need to be performed.

Rename the existing Asset Types for SAP BW

Rename all Asset Types where the name includes 'SAPBW' that were created by ERP/CRM Integrator to SAPBW xxxx (old).

These are:

- SAPBW Query
- SAPBW DSO
- SAPBW CubeDimension
- SAPBW Cube
- SAPBW ReusableComp
- SAPBW InofObjectAttribute
- SAPBW InfoObject

Reload All BW PDDs

Now use ERP/CRM Integrator to export to Collibra all BW PDDs. Use the same ERP/CRM Integrator Subject Areas as used in the previous export with ERP/CRM Integrator 7.5.

By this process, the new Asset Types will be created by ERP/CRM Integrator 7.8.

The process will **switch all reloaded assets to the new Asset Types**. No reloaded asset will then be attached to (e.g.) 'SAP BW Cube (old)' but will now be attached to the 'new' 'SAP BW Cube'.

This process works by 'patching' the assets using their Collibra Fullname and replacing all relationships with the new versions.

Note It is important to keep the Collibra Fullname format the same as that used in ERP/CRM Integrator 7.5. Therefore, no change of the "separators" in the ERP/CRM Integrator Settings .xlsx or the inclusion of a schema prefix not previously used is allowed.

Check for Asset Types no longer required

For each BW PDD, search for Asset Types 'SAPBW xxx (old)'. If such assets are found then:

- If of type 'SapBwCubeDimension (old)' delete them
- If of type 'Column', delete them if they have 'IO:' in the Fullname.

Note This will only be the case for customers that have enabled the switch 'SapBwTransferCharacteristicTables' in the SafyrSetting.xlsx. This is not the default setting.

- If of type 'Column', delete them if they have 'QRY:' in the Fullname. This should not be the case as these columns are replaced by SapBwFields with the same Fullname during the re-load process.
- If there are other types with '(old)' in the Asset Type name then it may be that not all BW objects that were in Collibra from the export using ERP/CRM Integrator 7.5 were also in the subsequent export using 7.8.

Delete Old Asset Types

There should now be no assets that reference any Asset Types containing '(old)'. Therefore, these Assets Types can be deleted.

Note With this deletion, all old relationship types that were based explicitly on the previous 'SAP BW*' types will be deleted as well.

Final Notes on the Migration Process

- Deleting the Asset Types of the form SAPBW xxx (old). It may be necessary to detach these from the Scope before attempting the deletion.
- For Custom Attributes, it will be necessary to assign the corresponding Attribute Types to the Scope of the 'new' Asset Types.
- Relationships between ERP/CRM Integrator-created Assets and Customer-created Assets will only survive if these Relationship Types are based upon 'common' Asset Type parents and not 'SAPBW xxx (old)' Asset Types (e.g. 'Data Asset')
- As with Custom Attributes, Custom Relationships will only show up in the UI if the corresponding Relation Types are assigned to the Scope of the new Asset Types.

Background to the Changes in Collibra Mappings

This section describes the changes to the Collibra Mappings between ERP/CRM Integrator 7.5.5 and 7.8.

AttributeType 'Column Type (ERP)' is removed

For ERPs:

The attribute type 'ColumnType (ERP)' was used for the columns of a view. It indicated if the column was derived from a view or table.

This information is now redundant because of the existing RelationType 'ColumnViewLinkColumn' and therefor removed.

For SAP BW:

The attribute type 'ColumnType (ERP)' was used to define the type of columns in a SapBwQuery (Row/Col/Free).

This information is now replaced by the new SapBwFieldGroup logic. A SapBwQuery has now up to 3 BwFieldGroups that correspond to the 'old' ColumnType (ERP).

Collibra SAP BW Asset Types

Object	ERP/CRM Integrator 7.5.5	ERP/CRM Integrator 7.7.x
SapBwDataStructure	N/A	new
SapBwField	N/A	new
SapBwFieldGroup	N/A	new
SapBwCube	SAP BW Cube (inherited from Table) (*iii)	SAP BW Cube (inherited from SAP BW DataStructure) (*ii)
SapBwCubeDimension	SAP BW CubeDimension (*i)	Replaced by SAP BW FieldGroup (*ii)
SapBwDso	SAP BW Dso (inherited from Table) (*iii)	SAP BW Dso (inherited from SAP BW DataStructure) (*ii)
SapBwHcpr	N/A	SAP BW Dso (inherited from SAP BW DataStructure) (*ii)
SapBwAdso	N/A	SAP BW Adso (inherited of SAP BW DataStructure) (*ii)
SapBwQuery	SAP BW Query (inherited of Table) (*iii)	SAP BW Query (inherited from SAP BW DataStructure) (*ii)
SapBwInfoObject	SAP BW InfoObject (inherited from DataElement) (*iii)	SAP BW InfoObject (inherited from SAP BW DataStructure) (*ii)
SapBwInfoObjectAttribute	SAP BW InfoObjectAttribute (inherited from DataElement) (*iii)	SAP BW InfoObjectAttribute (inherited from SAP BW Field) (*ii)

Object	ERP/CRM Integrator 7.5.5	ERP/CRM Integrator 7.7.x
Column	Column (SAP BW Query and SAP BW Dso context)	replaced by SAP BW Field (*ii)
SapBwReusableComp	SAP BW ReusableComp (inherited from DataElement) (*iv)	SAP BW ReusableComp (inherited from DataElement) (*ii)

Notes:

- **(*i)** Assets of this type need to be deleted as the Asset Name changes and the assets are no longer used (after a 'merge run')
- **(*ii)** The full name of the assets within Collibra is identical. Therefore, an asset type migration during the ERP/CRM Integrator to Collibra reload of the data is possible.
- **(*iii)** As the inheritance of the Asset Type changed, the existing Asset Type shall be renamed to 'xxx(old)' before the 'merge run'. The later removal of the asset type 'xxx(old)' forces the deletion of the obsolete relationship types linked to the 'old' asset type
- **(*iv)** The inheritance did not change. It is recommended to perform the same step as for (iii)

Collibra Relationship Types

These changes only apply to SAP BW mapping and content:

ERP/CRM Integrator 7.5.5	ERP/CRM Integrator 7.8
SapBwInfoObjectColumn SapBwCharacteristicTable SapBwInfoObjectAttribute	SapBwDataStructureField
SapBwInfoObjectCompounding	SapBwFieldGroupFieldRef
SapBwCubeNavAttributeRef SapBwDsoNavAttributeRef	SapBwDataStructureNavAttributeRef
SapBwReusableCompCube SapBwReusableCompDso SapBwReusableCompInfoObject	SapBwDataStructureReusableCompRef
SapBwReusableCompColumnRef	SapBwFieldReuseableCompRef
SapBwCubeToCubeRef SapBwCubeToDsoRef SapBwCubeToInfoObjectRef SapBwQueryToCubeRef SapBwQueryToDsoRef SapBwQueryToInfoObjectRef	SapBwDataStructureBasedOnRef
SchemaSapBwInfoObject	SchemaSapBwDataStructure

ERP/CRM Integrator 7.5.5	ERP/CRM Integrator 7.8
SapBwCubeToCubeDimRef SapBwInfoObjectCubeDimCharacteristic	Replaced by FieldGroup assets and SapBwFieldGroupFieldRef and SapBwDataStructureFieldGroup relationships
SapBwInfoObjectDsoKeyField SapBwInfoObjectDsoDataField SapBwInfoObjectCubeKeyFigure	Replaced by SapBwField and SapBwFieldGroup assets interconnected by SapBwFieldGroupFieldRef and SapBwDataStructureFieldGroup relationships
SapBwInfoObjectAttributeRefIObj	SapBwFieldInfoObjectRef
SapBwInfoObjectBasedOn	SapBwInfoObjectDerivedRef

If the asset types are renamed to '(old)' and later deleted, then the old and unused 7.5.5 relationship types will be deleted automatically by the Collibra system as well.