

Data Transfer Settings

Module Guide: Data Transfer Settings

Module Location

Settings > Data Transfer > Data Transfer Settings

Module Purpose

The **Data Transfer Settings** module functions as a data migration tool or a facility for bulk data import/export. This module is used to move large amounts of data into or out of the system, primarily for master data. This is crucial during the initial implementation phase of an ERP system or when bulk updates to existing data are necessary.?

1. Main View (List of Data Entities)

The main page displays a list of all data types or "entities" that can be imported or exported using this module.

View Explanation

- **Filter:** Allows searching for specific data entities by name.
- **Data Transfer Table:**
 - **Data Transfer:** The name of the data entity that can be transferred (e.g., `COA` (Chart of Accounts), `CUSTOMER`, `SUPPLIER`, `ITEM CATEGORY`).

- **Upload / Download:** This column contains two main action buttons for each entity:
 - **Upload:** A button to import new data into the system from a file (usually Excel or CSV).?
 - **Download:** A button to export existing data from the system into a template file.
- **Add New Button:** A button to open a form and define a new data entity that can be migrated, which is typically used only by developers.

2. Add New Page (Entity Definition)

This form, likely accessible only by developers, is used to define a new data entity that can be migrated.

View Explanation

- **Data:** The technical name of the table or view in the database.
- **Table Name:** The specific table name in the database that will be the source or destination for the data.
- **Field Name:** A box to select the specific columns from the table to be included in the import/export process.

3. Steps to Perform Data Migration

A typical process for importing new data (e.g., a customer list) is as follows:

- **Download Template:** From the main page, find the **CUSTOMER** entity and click the **Download** button. The system will generate a blank Excel/CSV file containing all the necessary columns for customer data.
- **Fill the Template:** Open the downloaded file and populate it with all your customer data. Ensure the data format (e.g., dates, numbers) matches what the system expects.
- **Upload File:** Return to the module, find the **CUSTOMER** entity again, and this time click the **Upload** button.
- **Select File & Process:** The system will prompt you to select the filled Excel/CSV file. Once the file is selected and the process starts, the system will read the data from the file and insert it into the customer database table.
- **Verify:** After the upload process is complete, check the customer data in the **Master Customer** module to ensure all data has been imported correctly.

4. Integrated Workflow & Business Process

- **Initial Implementation (Go-Live):** This module is a critical tool during the go-live preparation of an ERP system. The implementation team uses this module to migrate all master data from the old system to the new one, such as lists of customers, suppliers, items, and the chart of accounts.?
- **Bulk Updates:** If there is a need to update information on hundreds or thousands of master data records (e.g., changing the category of all items from 'A' to 'B'), an efficient

workflow is:

- **Download** the existing data.
- Perform bulk changes in the Excel file.
- **Upload** the modified file. This is much faster than changing data one-by-one through the user interface.

5. Tips & Important Notes

- **Data Quality:** The success of data migration heavily depends on the quality of the data in the upload file. Ensure there is no duplicate data, incorrect formatting, or missing mandatory data. The adage "garbage in, garbage out" is very applicable here.?
- **Migration Sequence:** Some data has dependencies. For example, you cannot import **ITEM** data if the **ITEM CATEGORY** does not yet exist. Perform data migration in a logical order.
- **Backup:** Before uploading a large amount of data, it is highly recommended to perform a database backup as a precaution.
- **Restricted Access:** While not as dangerous as the **Data Check** module, access to perform **Uploads** should be restricted to trained users who understand the system's data structure, such as the IT team or super users.

Revision #1

Created 23 October 2025 08:26:37 by Muhammad Ali Akbar

Updated 23 October 2025 08:28:23 by Muhammad Ali Akbar