Oracle® iSetup

User's Guide

Release 12.2

Part No. E22958-10

October 2021

ORACLE

Oracle iSetup User's Guide, Release 12.2

Part No. E22958-10

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Primary Author: Melody Yang, Mildred Wang

Contributing Author: Srikrishna Bandi, Kenneth Baxter, Anne Carlson, Sameer Chhabra, Noriko Gougler, Anish Malhotra, Ultan O'Broin, Mugunthan Srinivasan

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle iSetup User's Guide.*

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Computer desktop application usage and terminology.

If you have never used Oracle E-Business Suite, we suggest you attend one or more of the Oracle E-Business Suite training classes available through Oracle University.

See Related Information Sources on page x for more Oracle E-Business Suite product information.

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Structure

1 Introduction

This chapter gives you an overview of Oracle iSetup. It also gives you a brief introduction to Oracle iSetup's footprint and usage scenarios.

2 Configuring iSetup

This chapter helps you to configure iSetup. It covers the prerequisites for using iSetup and suggestions to tune iSetup for optimal performance.

3 iSetup Home

This chapter talks about information available on the Home page of Oracle iSetup.

4 Instance Mapping

This chapter helps you to maintain instance mappings. Mapped instances act as the source instance or target instances during migration.

5 Migrations

This chapter helps to create and maintain Selection Sets, Extracts, Transforms and Loads.

6 Reports

This chapter describes how to create, view, and download Standard and Comparison reports.

7 Interface Repository

This chapter explains the Interface Repository feature and its usage. All Oracle iSetup users can access Interface Repository for searching existing interfaces and users with the iSetup Super User role can register interfaces as well.

A Selection Set Templates

Oracle iSetup provides you with a set of selection set templates. This appendix describes the information on selection set templates.

B Profile Options

This appendix lists profile options and categories used in Oracle iSetup.

C Language Support Levels by Component

This appendix describes the language support in Oracle iSetup.

Glossary

Related Information Sources

This book is included in the Oracle E-Business Suite Documentation Library. If this guide refers you to other Oracle E-Business Suite documentation, use only the latest Release 12.2 versions of those guides.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **Oracle E-Business Suite Documentation Library** - This library, which is included in the Oracle E-Business Suite software distribution, provides PDF documentation as of the time of each release.

- **Oracle E-Business Suite Documentation Web Library** - This library, available on the Oracle Help Center (https://docs.oracle.com/cd/E26401_01/index.htm), provides the latest updates to Oracle E-Business Suite Release 12.2 documentation. Most documents are available in PDF and HTML formats.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available from My Oracle Support.

Related Guides

You should have the following related books on hand. Depending on the requirements of your particular installation, you may also need additional manuals or guides.

Oracle E-Business Suite User's Guide

This guide explains how to navigate products, enter and query data, and run concurrent requests by means of the user interfaces (UI) of Oracle E-Business Suite. It includes basic information on setting preferences and customizing the UI. An introduction to Oracle Enterprise Command Centers is also included. Lastly, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

Oracle iSetup Developer's Guide

This guide describes how to build, test, and deploy Oracle iSetup Framework interfaces.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle Advanced Pricing User's Guide

This guide describes how to set up and use Oracle Advanced Pricing features such as price lists, modifiers, qualifiers, formulas, multi-currency lists, agreements, archive and purge tools, reports, and concurrent programs.

Oracle Advanced Supply Chain Planning Implementation and User's Guide

This guide describes various types of plans and the setup tasks for Oracle Advanced Supply Chain Planning and Oracle Inventory Optimization. How to set up the supply chain, stimulate plan changes, optimize and constrain plans, as well as how to plan in various manufacturing environments are also addressed in this guide.

Oracle Assets User Guide

This guide provides you with information on how to implement and use Oracle Assets. Use this guide to understand the implementation steps required for application use, including defining depreciation books, depreciation method, and asset categories. It also contains information on setting up assets in the system, maintaining assets, retiring and reinstating assets, depreciation, group depreciation, accounting and tax accounting, budgeting, online inquiries, impairment processing, and Oracle Assets reporting. The guide explains using Oracle Assets with Multiple Reporting Currencies (MRC). This guide also includes a comprehensive list of profile options that you can set to customize application behavior.

Oracle Bills of Material User's Guide

This guide describes how to create various bills of materials to maximize efficiency, improve quality and lower cost for the most sophisticated manufacturing environments. By detailing integrated product structures and processes, flexible product and process definition, and configuration management, this guide enables you to manage product details within and across multiple manufacturing sites.

Oracle Cash Management User Guide

This guide describes how to use Oracle Cash Management to clear your receipts, as well as reconcile bank statements with your outstanding balances and transactions. This manual also explains how to effectively manage and control your cash cycle. It provides comprehensive bank reconciliation and flexible cash forecasting.

Oracle Engineering User's Guide

This guide enables your engineers to utilize the features of Oracle Engineering to quickly introduce and manage new designs into production. Specifically, this guide details how to quickly and accurately define the resources, materials and processes necessary to implement changes in product design.

Oracle Enterprise Asset Management User's Guide

This guide discusses how to manage and maintain work orders and maintenance workbench, as well as provides Oracle enterprise Asset Management (eAM) preventive maintenance solution. The eAM's integration with other Oracle products including Oracle Property Management, Cost Management, Project Manufacturing, and Quality are also addressed in this guide.

Oracle General Ledger User's Guide

This guide provides information on how to use Oracle General Ledger. Use this guide to learn how to create and maintain ledgers, ledger currencies, budgets, and journal entries. This guide also includes information about running financial reports.

Oracle HRMS Documentation Sets

These sets of guides explains how to define your employees, so you can give them operating unit and job assignments. It also explains how to set up an organization (operating unit). Even if you do not install Oracle HRMS, you can set up employees and

organizations using Oracle HRMS windows. Specifically, the following manual will help you set up employees and operating units:

Using Oracle HRMS – The Fundamentals. This user guide explains how to set up and use enterprise modeling, organization management, and cost analysis.

Oracle Inventory User's Guide

This guide describes how to define items and item information, perform receiving and inventory transactions, maintain cost control, plan items, perform cycle counting and physical inventories, and set up Oracle Inventory.

Oracle Order Management User's Guide

This guide describes how to enter sales orders and returns, copy existing sales orders, schedule orders, release orders, create price lists and discounts for orders, run processes, and create reports.

Oracle Payables User's Guide

This guide describes how to use Oracle Payables to create invoices and make payments. In addition, it describes how to enter and manage suppliers, import invoices using the Payables open interface, manage purchase order and receipt matching, apply holds to invoices, and validate invoices. It contains information on managing expense reporting, procurement cards, and credit cards. This guide also explains the accounting for Payables transactions.

Oracle Purchasing User's Guide

This guide describes how to create and approve purchasing documents, including requisitions, different types of purchase orders, quotations, RFQs, and receipts. This guide also describes how to manage your supply base through agreements, sourcing rules, and approved supplier lists. In addition, this guide explains how you can automatically create purchasing documents based on business rules through integration with Oracle Workflow technology, which automates many of the key procurement processes.

Oracle Quality User's Guide

This guide describes how Oracle Quality can be used to meet your quality data collection and analysis needs. This guide also explains how Oracle Quality interfaces with other Oracle Manufacturing applications to provide a closed loop quality control system.

Oracle Receivables User Guide

This guide provides you with information on how to use Oracle Receivables. Use this guide to learn how to create and maintain transactions and bills receivable, enter and apply receipts, enter customer information, and manage revenue. This guide also includes information about accounting in Receivables. Use the Standard Navigation Paths appendix to find out how to access each Receivables window.

Oracle Shipping Execution User's Guide

This guide provides information on setting up and using Oracle Shipping.

Oracle Work in Progress User's Guide

This guide describes how Oracle Work in Process provides a complete production management system. Specifically this guide describes how discrete, repetitive, assemble–to–order, project, flow, and mixed manufacturing environments are supported.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the Oracle E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Introduction

This chapter gives you an overview of Oracle iSetup. It also gives you a brief introduction to Oracle iSetup's footprint and usage scenarios.

This chapter covers the following topics:

- About Oracle iSetup
- Footprint
- Usage Scenarios

About Oracle iSetup

Oracle iSetup, a data migration and reporting tool, is a part of the Oracle E-Business Suite. This tool consists of the Migrator and the Reporter:

- The **Migrator** helps you to migrate data from one instance of Oracle E-Business Suite to another. Following are the steps to migrate data:
  - **Extract** select data from an Oracle E-Business Suite instance.
  - **Transform** select attributes of the extracted data objects as per your requirements.
  - **Load** data to the target Oracle E-Business Suite instance.
- The **Reporter** helps you to generate reports. You can:
  - Generate reports on the extracted data.
  - Compare two sets of extracted data to identify differences.

    Additional Information: Transforming the attributes is an optional step.

Footprint

Currently, Oracle iSetup helps to migrate data for the following applications:

- Oracle Application Object Library (FND)
- Oracle Financials
- Oracle Human Resources Management System
- Oracle Supply Chain Management

For more details on the areas covered by Oracle iSetup, within these product families, refer to Selection Sets Templates, page A-1.

Usage Scenarios

There are many scenarios where Oracle iSetup can be used. Following are some of these:

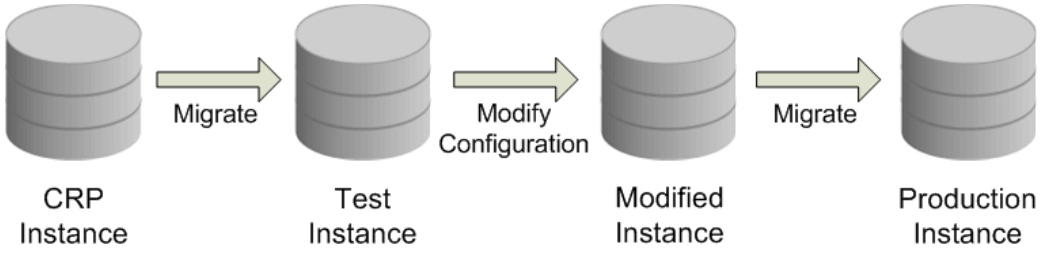
Migrate Data

For example, the CRP instance is configured and ready for test by the quality team. Now, you need to:

1. Migrate select configuration to the test instance.
2. After testing, modify the configuration in another instance.
3. Migrate the modified configuration to the production instance.

These steps are illustrated in the diagram below.

Migrate Data

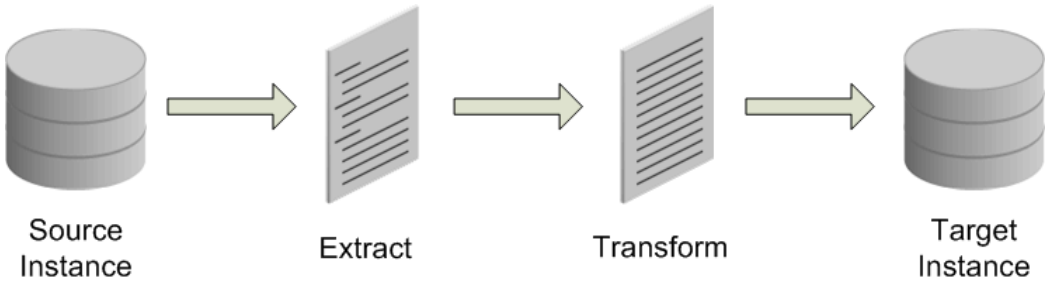


Transform Data

In another example, he test instance is configured. Using Oracle iSetup you can

transform the data and load it to the target instance, as shown in the following illustration.

Transform Data

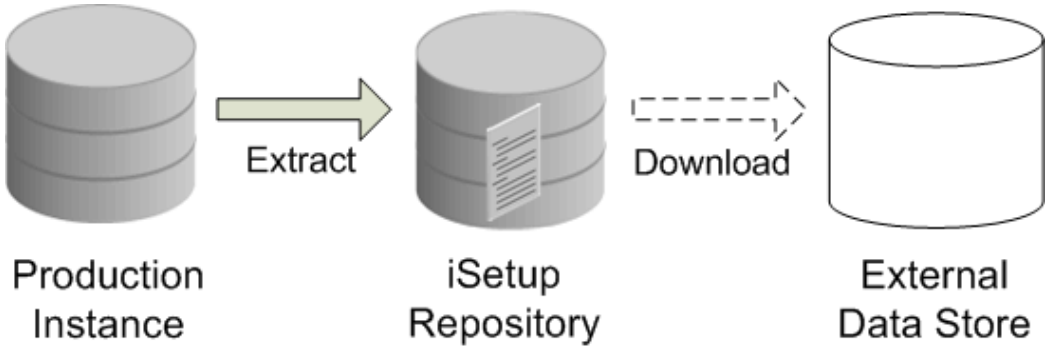


1. Extract selected data from the source instance.
2. Transform the data.
3. Load it to the target instance.

Save Configuration

Extract data from an instance using Oracle iSetup. The extracted data is stored in the Oracle iSetup repository. You can download this data and save it in an external repository, as illustrated below:

Save an Extract



The steps are:

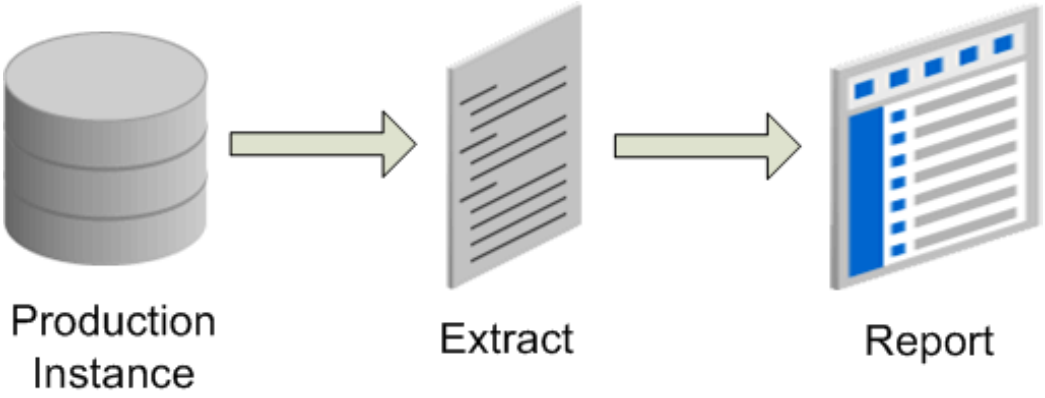
1. Extract the data from the production instance.
2. Store the data in the Oracle iSetup repository.
3. Optionally download the data to an external data store.

Report on Current Configuration

Generate a report on the extracted data available in the Oracle iSetup repository. This report can be viewed online or downloaded in different formats. The report can also, be sent to a functional analyst. The Reporter module enables this functionality.

As shown in the following diagram, data is extracted from a production instance and a report is generated from the extracted data.

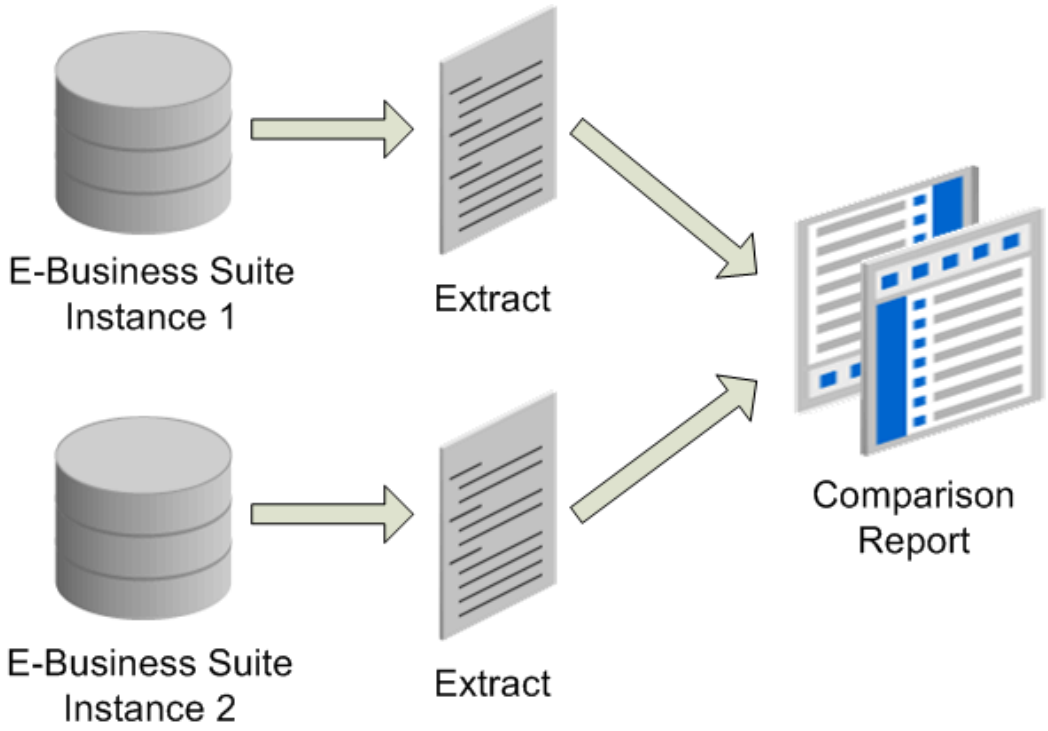
Generate Report



Comparison Reporting

Compare the differences in data between the production instance and the test instance, as shown in the following diagram:

Comparison Report



1. Extract data from each of two instances.
2. Generate a comparison report based on the extracted data.

2

Configuring iSetup

This chapter helps you to configure iSetup. It covers the prerequisites for using iSetup and suggestions to tune iSetup for optimal performance.

This chapter covers the following topics:

- Prerequisites
- Instance Overview
- Using Oracle iSetup

Prerequisites

- The source, central, and the target instances must be at the same patch set level. For more information, see Instance Overview, page 2-1.

Instance Overview

An instance comprises of one or many applications of the Oracle E-Business Suite along with a dedicated Oracle database instance.

Types of Instances

Following are the types of instances that you use while working with Oracle iSetup:

- **Source Instance:** The instance used to extract data.
- **Central Instance:** The instance that hosts the iSetup application and iSetup Repository.
- **Target Instance:** The instance where data is to be loaded.

Note:

- The Central instance is optional. Oracle iSetup can be run from either the source or the target instance.
- The Target instance need not be a fresh install.

Preparing an Instance

Perform the following tasks to prepare an instance of the Oracle E-Business Suite:

1. **Recompile Database Objects**

   Check for invalid database objects and recompile if necessary. Invalid objects may cause the load to fail. Contact your System Administrator for more information.

2. **Set Open Cursor Limit**

   Set the open cursor limit for your instance to 750. This setting is in the `init.ora` file for the instance. The default value is 500. If this value is not optimally set, you may encounter an error once the load may exceeds the maximum open cursor limit.

3. **Set Sleep Seconds for the Concurrent Manager**

   This setting specifies the time a request remains in the pending status before being picked up by the Concurrent Manager for processing. A high setting, such as 300 seconds, slows down the load or extract process.

   1. Navigate to Concurrent, then Manager, and then Define Form.
   2. Open the Define Form and query for Standard Manager. Click **Work Shifts** to continue. This takes you to the Workshifts screen.
   3. Check the Sleep Seconds setting. It is recommended to set this to 30 seconds or less.

4. **AZ: VO Fetch Size** (Concurrent Processing profile category)

   This profile option specifies the number of records that Oracle iSetup extracts in a batch, before it writes it to a temporary location on the file system for later use. The profile option is set on the source instance only. The recommended and the maximum value for the option AZ: VO Fetch Size is 100.

5. **AZ: Commit Row Counts** (Concurrent Processing profile category)

   This profile option specifies the number of records that Oracle iSetup commits to the database on the target instance during load. If the value is high, you require high JVM heap size to avoid an out-of-memory error during load. This profile option is set on the target instance only. It is recommended to set this value to 1000.

6. **AZ: CP Number Of Batches** (Concurrent Processing profile category)

   This profile option specifies the number of threads that can be launched during extract or load. This profile option is to be set on the source and the target instances. It is recommended to set this value to 5.

   > **Note:** This option must be set to 1 when any Manufacturing APIs are used to extract or load.

7. **AZ: Reporter Max Records** (User Interface profile category)

   This profile option specifies the number of records that the system would fetch for rendering the online report. The maximum value is 200 and the recommended value is 100.

8. **AZ: Number Of Records For Home Tab** (User Interface profile category)

   This profile option specifies the number of most recent Extracts, Loads, and Reports to be displayed on the Home screen. It is recommended to set this value to 4.

For more information on profile options and categories, see Profile Options, page B-1.

Using Oracle iSetup

Oracle iSetup is a part of the Oracle E-Business Suite. Hence, you must log in to Oracle E-Business Suite using the self-service login URL.

1. **Log in to Oracle E-Business Suite**

   Log in to the Oracle E-Business Suite using your user name and password.

2. **Choose a Responsibility**

   The user name you log in with must have the Oracle iSetup responsibility. From the list of responsibilities, select **iSetup** to access the Oracle iSetup functionality.

3. **Choose Function**

   Menu options for this responsibility are:

   iSetup Home: Takes you to the Home page of iSetup. This page displays the most recent extracts, loads and reports. It also has links to other components of the product.

   Migrations: This menu contains the Selection Sets, Extracts, Transforms, and Loads subtabs. Each of these subtabs take you to their respective windows.

   Reports: This menu contains the Standard Reports and Comparison Reports subtabs. Clicking on them takes you to the respective windows.

   Administration: This menu contains the Instance Mapping subtab. If you have

appropriate access privileges, you can also see the Interface Repository subtab in addition to the Instance Mapping subtab.

3

iSetup Home

This chapter talks about information available on the Home page of Oracle iSetup.

This chapter covers the following topics:

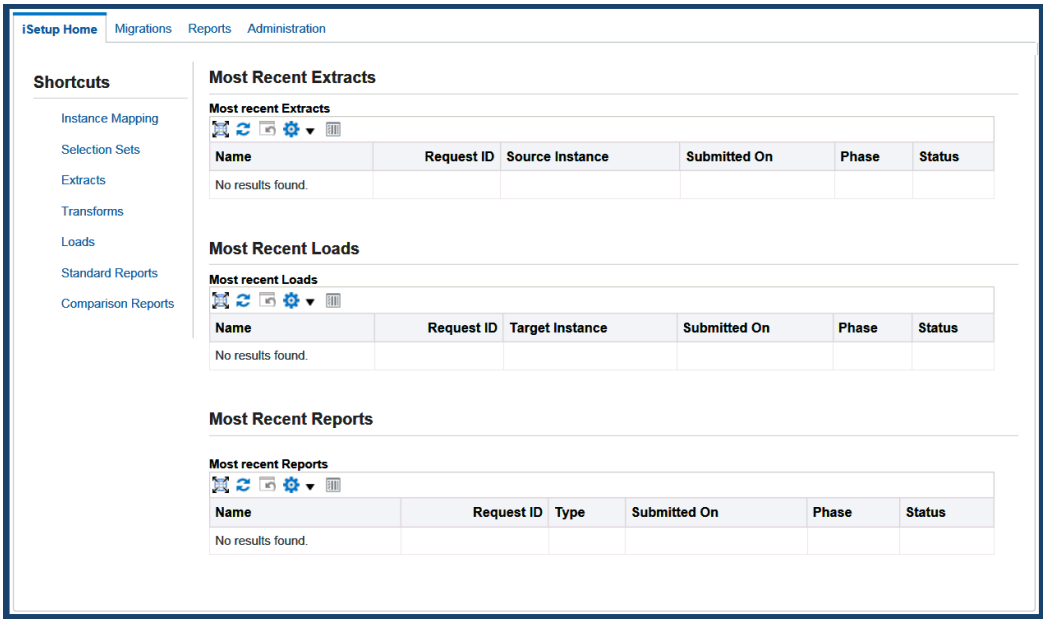
- Home Page

Home Page

The Home page in Oracle iSetup provides you information and lets you reach the required functionality with the least effort. You can find the following information in the Home page:

- Most Recent Objects
- Shortcuts
- Others

iSetup Home Page



Most Recent Objects

The Home page lists the most recent extracts, loads and reports.

- **Most Recent Extracts:** Lists the latest extracts that you have created.
- **Most Recent Loads:** Lists the latest loads that you have created.
- **Most Recent Reports:** Lists the latest reports that you have created.

> **Note:** The AZ: Number Of Records For Home Tab profile option specifies the number of records to be displayed for each of the extracts, loads, and reports.

Shortcuts

The Home page provides shortcuts that help you to quickly reach any of the following components in Oracle iSetup:

- Instance Mapping
- Selection Sets
- Extracts

- Transforms
- Loads
- Standard Reports
- Comparison Reports

Others

In addition to these, you can reach the Oracle E-Business Suite home, log out of the Oracle E-Business Suite, manage preferences, access help, or perform diagnostics.

4

Instance Mapping

This chapter helps you to maintain instance mappings. Mapped instances act as the source instance or target instances during migration.

This chapter covers the following topics:

- Overview
- Prerequisites
- Instance Mapping
- Creating an Instance Mapping

Overview

Any instance, that needs to be used as a source or target instance during migration, must be mapped from the central instance.

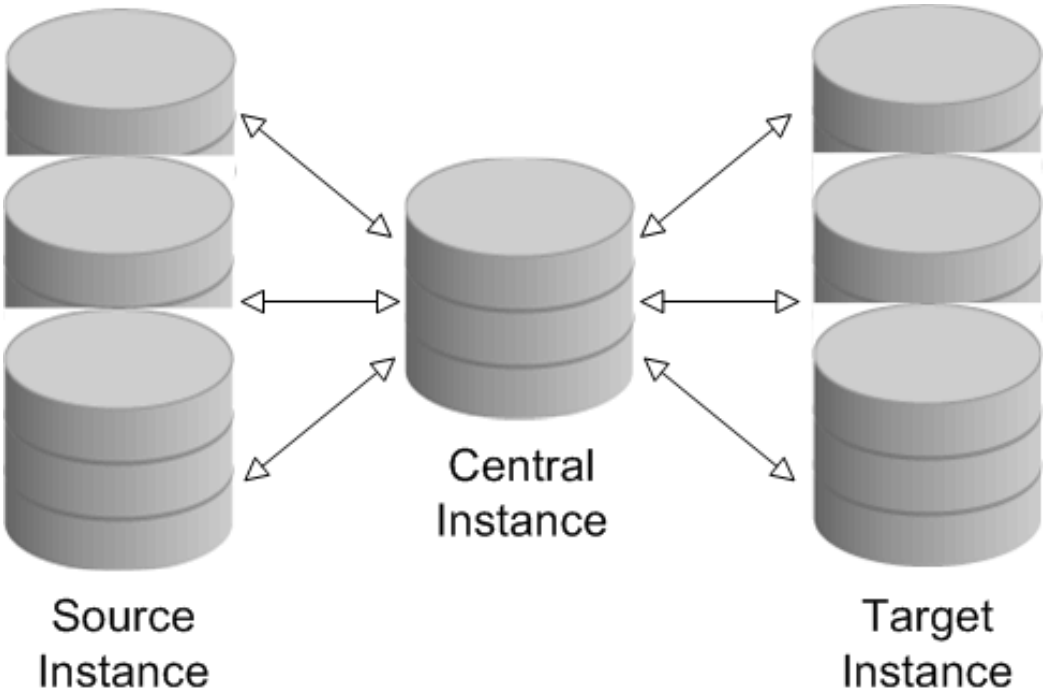
The Administration tab lets you create and maintain instance mappings. These instances appear as a list of values for the source and target instances in the Extracts and the Loads windows.

The DBC file is used to connect to the instance to process any extract or load requests.

Though Oracle iSetup may be functional on either the source or the target instance, have a central instance from which Oracle iSetup runs is highly recommended. The central instance helps you to monitor all migrations.

The following diagram shows the instance mapping topology, in which source instances and target instances are mapped to a central instance.

Instance Mapping Topology



Prerequisites

Following are the prerequisites for mapping an instance:

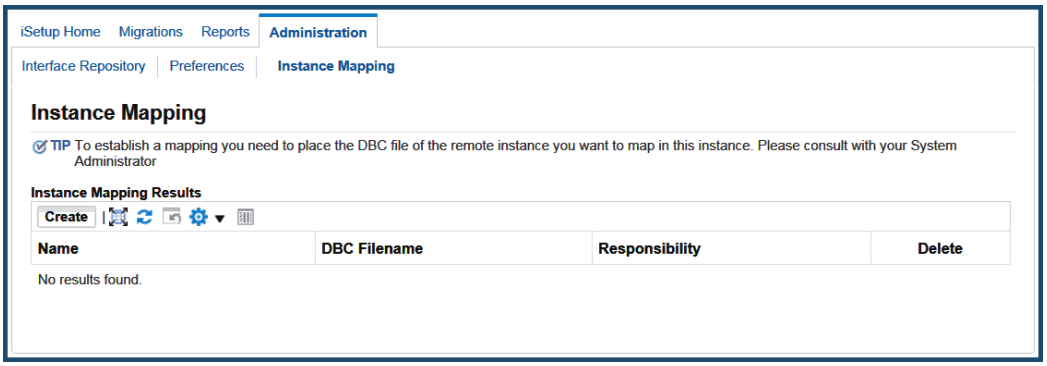
- The remote instance must have the Database Configuration (DBC) file for the central instance.
- The central instance must have a DBC file for each remote instance.
- The DBC file name is case-sensitive.
- Each instance to be mapped must have the same, valid user created as that logged into the central instance with the iSetup responsibility.
- The central, source, and target databases must be enabled to connect with each other. To do that, edit the required parameters in the `$TNS_ADMIN/sqlnet.ora` file.

Note: Map the central instance to use it as a source or a target instance.

Instance Mapping

Click the Administration tab to access the Instance Mapping window where displays the instance mappings that are already present. If you have not created any instance mappings, the table would be empty.

Administration: Instance Mapping



The Instance Mapping table consists of the following columns:

- **Name:** Displays the name you specified during instance mapping.
- **DBC Filename:** Displays the DBC filename you have specified.
- **Responsibility:** Displays the responsibility used to create the mapping. For all mappings, this must be iSetup responsibility.
    - At any time, a maximum of 10 records appear in the table.
    - You can click on some of the column headers to sort the records.
    - By default, the table is sorted on instance name.

To maintain instance mappings, you can perform the following actions from this window:

Create: Click **Create** to create a new instance mapping. This takes you to the Create Instance Mapping Window, page 4-4.

Deleting an Instance Mapping

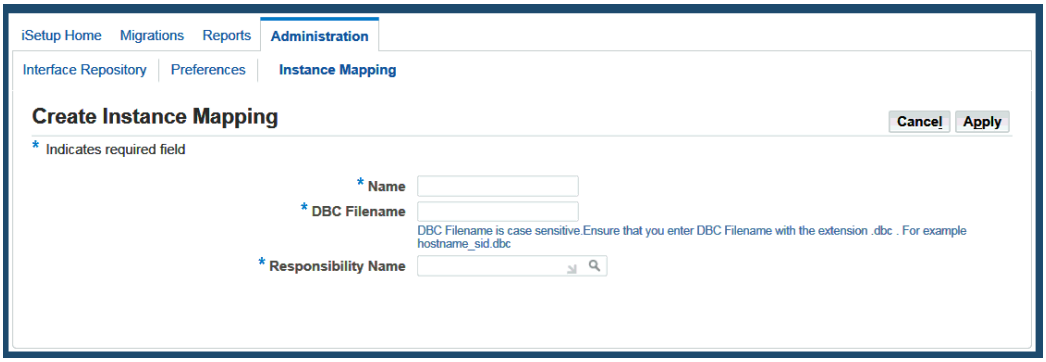
Click the **Delete** icon to delete an instance mapping. Confirm the delete action in the Warning window. Once a mapping has been deleted, it cannot be used as a source or a target instance for a new migration. Any load process that was not completed cannot be

restarted if the target instance has been deleted. It is recommended that you do not delete an instance mapping till all the extract or load processes involving this instance mapping are completed.

Creating an Instance Mapping

Prerequisites: Before you map an instance, ensure that the DBC file for that instance is available in the central instance.

Administration: Create Instance Mapping



Following are the steps to create a new instance mapping:

1. **Navigate to the Create Instance Mapping Window**

   Click **Create** in the Instance Mapping window. This takes you to the Create Instance Mapping window.

2. **Enter Mapping Parameters**

   1. Enter a unique instance mapping name. It is used in the source and target instance drop-down boxes on the Extract and Load windows.

   2. Enter a DBC file name for mapping.

      The DBC filename is case sensitive.

      > **Note:** The location of the DBC filename is available in the environment variable $FND_SECURE.

3. **Select Responsibility**

   Select the iSetup responsibility from the list of values.

4. **Save New Instance Mapping**

   Click **Apply** to save the new instance mapping. This takes you back to the

Administration window with a confirmation that the instance is mapped.

- It is recommended that you create one instance name for every instance.
- The DBC file is generated as part of the Rapid Install of Oracle E-Business Suite.
- You can generate the DBC file using the Admin AppServer utility. The AdminAppServer utility is a Java utility that you can run from the command line. For how to use this tool, see AdminAppServer Utility, *Oracle E-Business Suite Setup Guide* for details.

5

Migrations

This chapter helps to create and maintain Selection Sets, Extracts, Transforms and Loads.

This chapter covers the following topics:

- Overview
- Selection Sets
- Extracts
- Transforms
- Loads

Overview

Data migration is a four-step process:

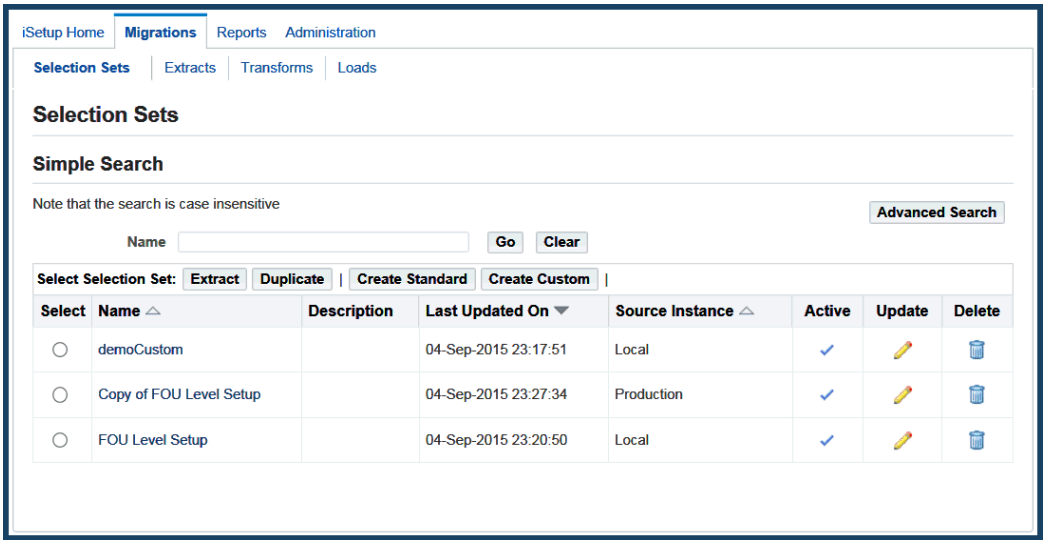
- Create a **Selection Set.**
- **Extract** data from the source instance, using the selection sets.
- **Transform** the extracted data, if required. (Optional)
- **Load** the extracted or transformed data to the target instance.

Selection Sets

Selection sets are the building blocks for the migration process. Oracle iSetup provides a set of templates allowing you to create selection sets assisted with existing templates. You can also create custom selection sets without using existing templates.

You can Create, Search, View, Update, Duplicate, or Delete a selection set.

Selection Sets



Searching for Selection Sets

You can either do a Simple Search or an Advanced Search.

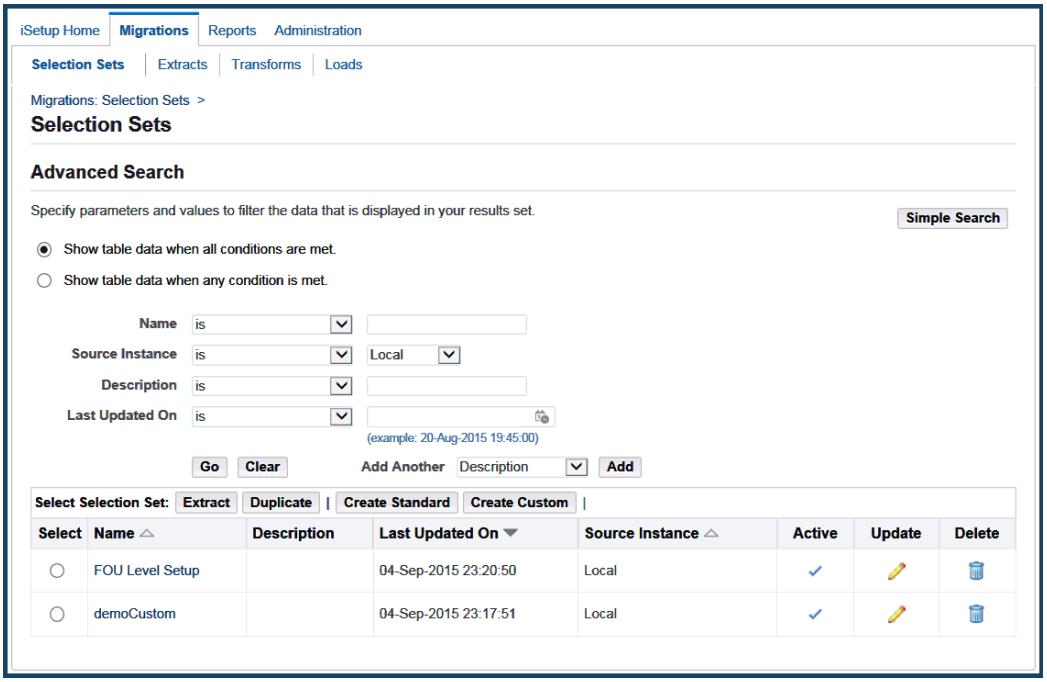
In **Advanced Search**, you can search on the following attributes of the selection set:

- Name
- Source Instance
- Description
- Last Updated On

In addition, you can have the search results match any or all the criteria you specify by selecting an appropriate button.

> **Note:** With selection sets, the filter criteria evaluation can include non-exact matches in the results, as if a wildcard character is used. For example, if "DEMO_MGT_USER" is entered as the search criterion, the search results would match "DEMO_MGT_USER%" and not only the exact string "DEMO_MGT_USER".

Advanced Search for Selection Sets



Search Results

All selection sets that match your search criteria are listed in a table format. Use the search results page to:

- View a list of selection sets with name, description, last updated on, source instance, and active status
- Create a selection set by clicking the **Create** button. Alternatively, if the required setup steps have been done, you can do the following:
  - Create a selection set using an existing template by clicking **Create Standard**
  - Create a custom selection set by clicking **Create Custom** if you have appropriate privileges
- Update a selection set by clicking the pencil icon to access the Selection Set: Update page
- Delete a selection set by clicking the "trashcan" icon
- View the details of a selection set by clicking the name link
- Create a duplicate copy of a selection set by first selecting a selection set for copy and then clicking **Duplicate**

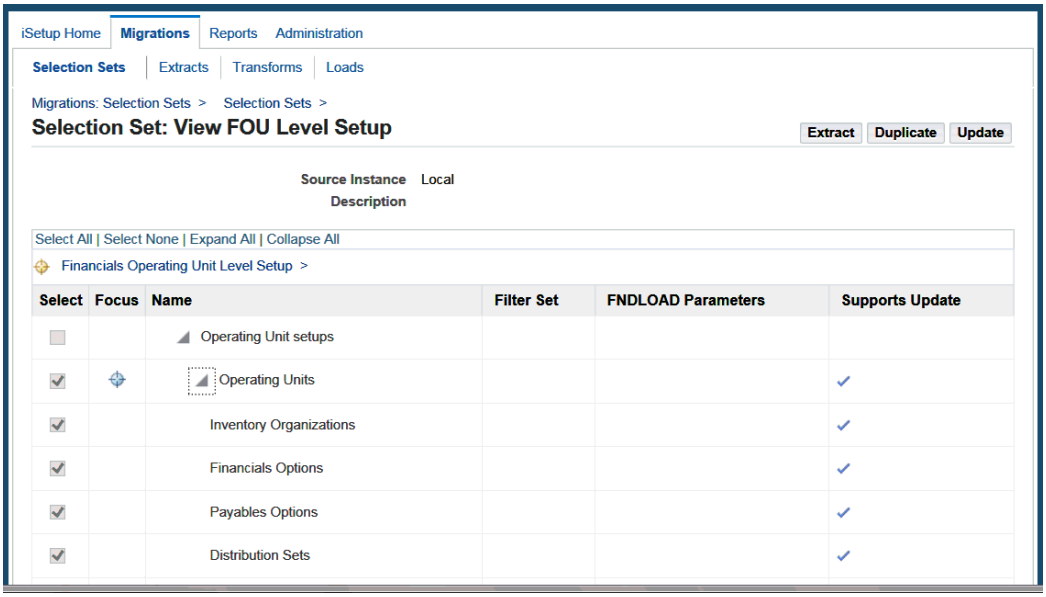
- Extract an active selection set for data migration by first selecting a selection set and then clicking **Extract**

An Active flag in the search results indicates that a selection set is created without using the templates from earlier releases. If the selection set is inactive, with the Active flag unchecked, then the selection set cannot be used for any further data migration.

Viewing a Selection Set

To view an existing selection set, click the desired name link on the search results page. This takes you to the Selection Set Details page which displays read-only information, including source instance, description, and a list of data objects that forms part of the selected selection set; and if it is a Custom Selection Set then one extra column, Load Sequence, is displayed. The buttons for Extract, Duplicate, and Update can be used to navigate to any of these flows.

Selection Set Details



Each data object of the selection set can have the following attributes:

- **Filters:** If the data object has filterable values set, then the **Filter** icon appears. By clicking the **Filter** icon, you can access the View Filters page to view filter details associated with the data object. You can also set a filter to narrow down the data to be extracted; that is, retrieve only the subset of data satisfying the given filter criteria.

  See: Viewing Filters, page 5-5.

- **FNDLOAD Parameters:** Any FNDLOAD parameters are shown here. For example, `UPLOAD_MODE=NLS WARNINGS=TRUE` for migrating translation data.

- **Supports Update:** If the data object updates the target data during load, then the Support Update flag appears. The Supports Update flag indicates that the data in the target is updatable.

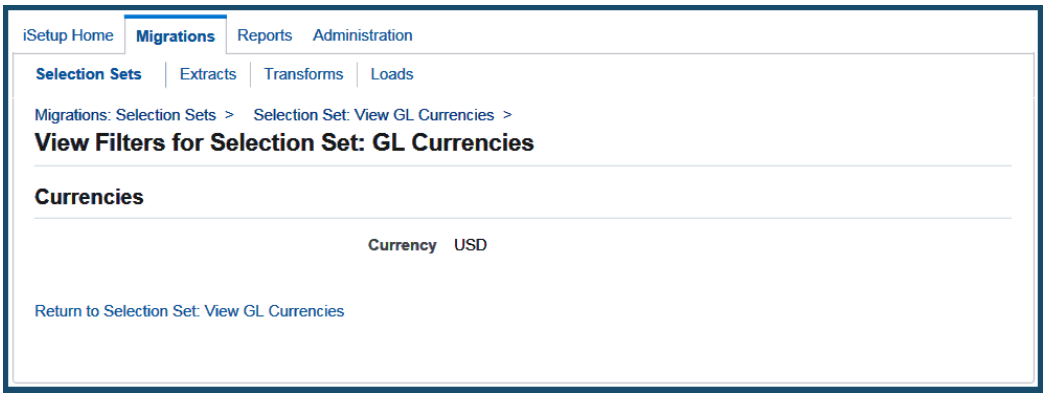
- **Load Sequence:** Number given by user while creating Custom Selection Set for specifying the order for loading the selection set.

> **Note:** Beginning with Release 12.2.6, extraction for language data uses the value of the profile AZ: Export Languages for BC4J APIs, the FNDLOAD API, and the WFLOAD API. In Release 12.2.5, for BC4J APIs, extraction for language data is based on the profile AZ: Export Languages, and for the FNDLOAD API and WFLOAD API, it is based on the current session language.

Viewing Filters

You can view filter information associated with a selection set or an extract from the Selection Set Details page or the Extract Details page. The View Filters page displays read-only view of the filter name and its value associated with the given selection set or extract.

View Filters



Creating a Selection Set

Oracle iSetup allows you to create selection sets in the following ways:

- Creating a Selection Set with a Template, page 5-6: Click **Create Standard** in the Selection Sets Search page to select a template for the selection set creation

- Creating a Custom Selection Set, page 5-10: Click **Create Custom** in the Selection Sets Search page to create a selection set without using a template

Important: The **Create Custom** button appears only if the user is granted the iSetup Super User role along with the iSetup responsibility.

Creating a Selection Set with a Template

From the Migrations tab, choose the Selection Sets subtab, and click **Create Standard** to access the Create Selection Set: Select Template page. You must first select a selection set template and then set necessary parameters for the selection set.

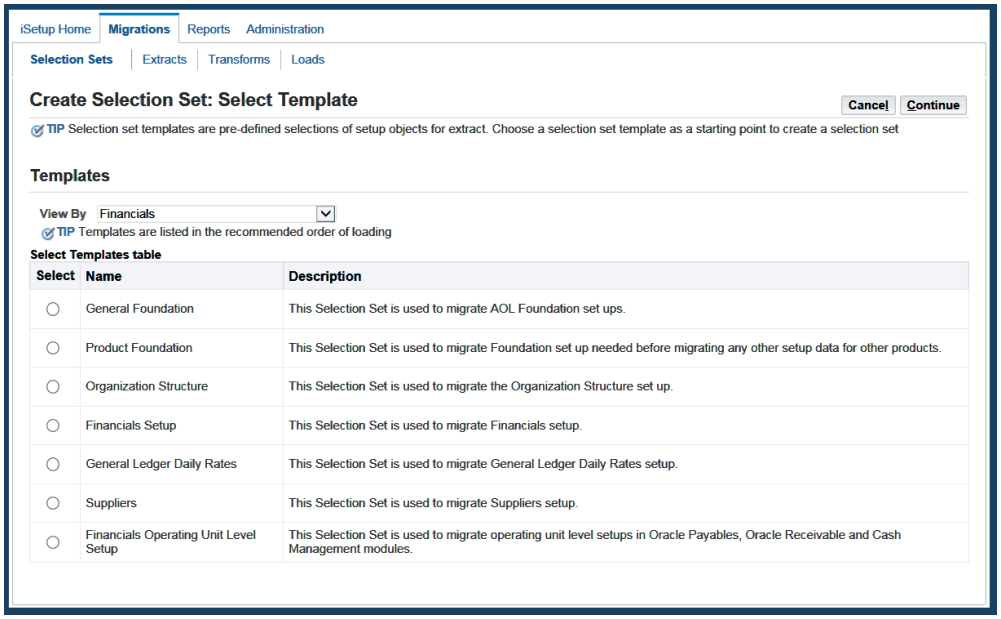
You can View Selection Sets templates by selecting any of the available categories from View By list.

Following are the steps to create a selection set with a template:

1. **Select a Template:** Select a template from the available list of selection set templates. Each template consists of a specific set of data objects. For more information on objects within each selection set, see Selection Sets, page A-1.

   Important: In Release 12, all the selection set templates from earlier releases will no longer be available for the creation of a selection set. Selection sets created using templates from earlier releases will be inactive; that is, the flag is unchecked in the Active column. If an extract was created from the earlier releases of a selection set (an inactive selection set), then this extract is inactive and cannot be used for a Transform, Load, or Report process unless it has the Report icon allowing you to create reports.

Create Selection Set: Select Template

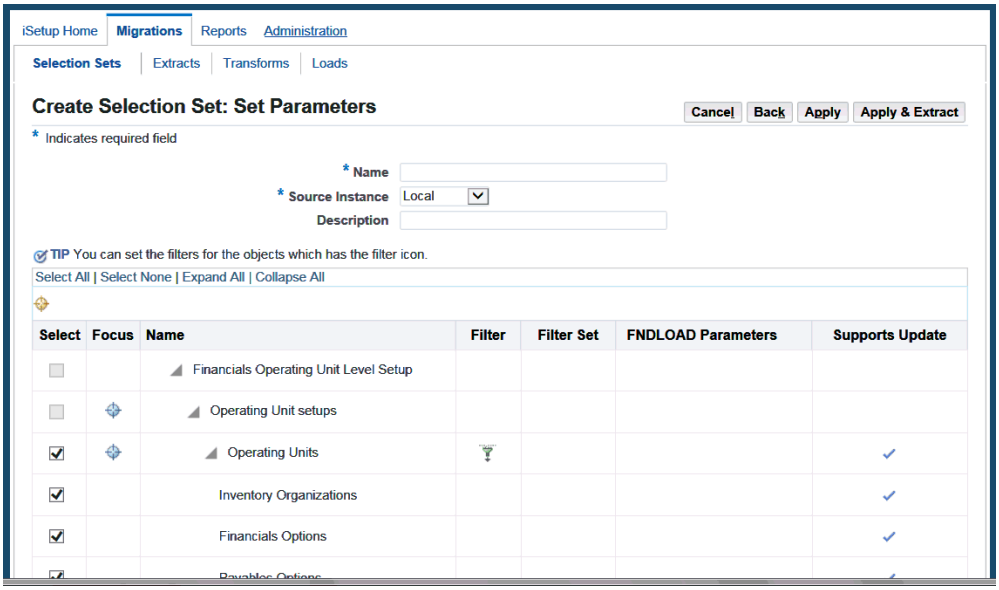


2. **Name:** Enter a name for the selection set. This is a required field.

3. **Source Instance:** Select the source instance. This helps you to set filters for the data objects during extraction. This is a required field.

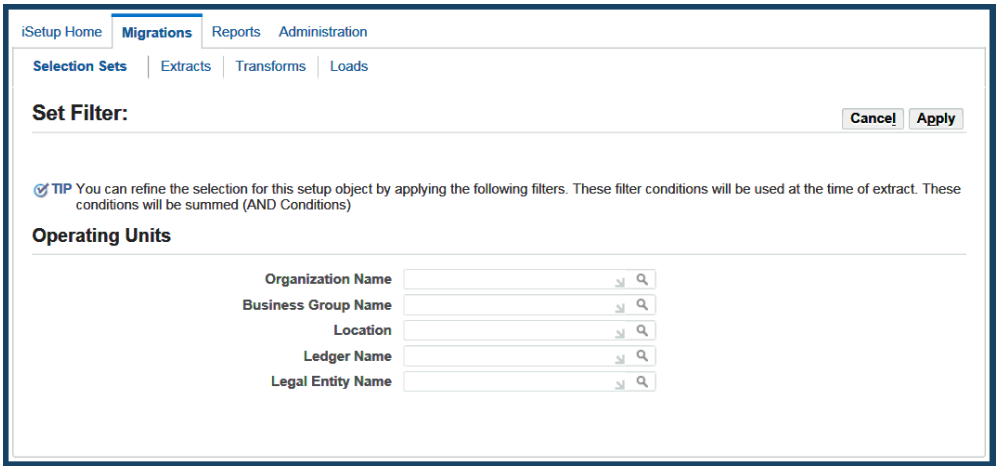
4. **Description:** Provide informative description that could help in identifying the selection set.

Create Selection Set: Set Parameters



5. **Set the Filter Criteria:** This is optional. Filters can be set on some attributes of a data object. All data objects do not support filters.

Create Selection Set: Set Filters



Following are the steps to set filters:

1. Click the **Filter** icon. All filterable attributes appear on the page.

2. You can also search for values to set the filter on. To search, click the **Search** icon. In the new window, search and select the value you want to filter on. These values are retrieved from the selected source instance.

You can filter on more than one condition and the result is a filter of all the conditions.

3. Click **Apply**. You are routed back to the Create Selection Set: Set Parameters page.

6. If using an FNDLOAD API, enter FNDLOAD Parameters. These parameters will be passed when the selection set is created.

   The following parameters are supported:

   - DOWNLOAD_PASSWORD=YES
   - UPLOAD_PASSWORD=YES
   - CUSTOM_MODE=FORCE
   - UPLOAD_MODE=REPLACE
   - UPDATE_USER=Y
   - UPLOAD_MODE=NLS
   - WARNINGS=TRUE

   Multiple parameters can be entered, separated by a space. For example,

   `UPLOAD_MODE=NLS WARNINGS=TRUE`

   A parameter can be passed with spaces. For example, `CUSTOM_MODE=FORCE` and `CUSTOM_MODE = FORCE` are both valid.

   > **Note:** For migrating translation data, the parameter `UPLOAD_MODE=NLS` is used with the parameter `WARNINGS=TRUE` to ensure that as much translated data is migrated whenever possible. For example, with menus with parent-child records, one missing child record should not prevent other existing child record of the same parent to be migrated.

7. Click **Apply** to Create Selection Set.

   This takes you to the Selection Set page with a confirmation.

8. Click **Apply and Extract** to save the selection set and navigate to the Extract window.

   Note:

- The Supports Update flag indicates if the data object updates the target data during load.
- The Active flag indicates if the selection set is created from an earlier releases with an old template.
- Only instances mapped using the Instance Mapping page under Administration are available as source instance during creation of the selection set.
- Some FND objects have predefined filters already set. You can view filter details by clicking an icon in the Selection Set Details and Extracts Details pages.

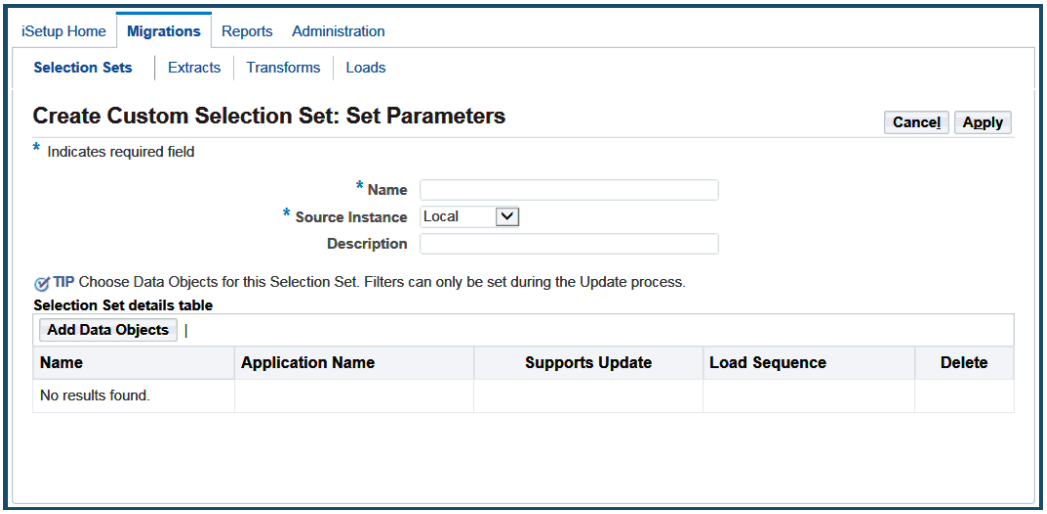
Creating a Custom Selection Set

Instead of creating a selection set using a template, users with the iSetup Super User role can create a custom selection set by adding the data objects available in the iSetup Interface Repository. See: Registering an Interface, page 7-5 and Example of Data Migration Using Registered Interfaces, page 7-12.

From the Migrations tab, choose the Selection Sets subtab, and click **Create Custom** in the Selection Sets Search window to access the Create Custom Selection Set page.

> **Important:** Only users with the iSetup Super User role along with the iSetup responsibility can see **Create Custom** displayed in the Selection Sets Search window.

Create Custom Selection Sets



Following are the steps to create a custom selection set:

1. **Name:** Enter a name for your selection set. This is a required field.

2. **Source Instance:** Select a source instance.

3. **Description:** Enter descriptive information for your selection set.

4. Click on **Add Data Object**. This action will take you to the LOV search page. Search for and select one or more Data Objects for which you want to create a Custom Selection Set.

   After selecting a data object, you can see the following associated information populates:

   - **Application Name:** The application name that owns this interface.
   - **Supports Update:** Indicates whether this interface supports update during load.
   - **Load Sequence:** Indicates the order in which loading of data objects will occur.

5. Click **Apply** to get the confirmation page and return to the Selection Set Search page.

To better understand how to use the custom selection set creation feature, see Example of Data Migration Using Registered Interfaces, page 7-12 for details.

Updating a Selection Set

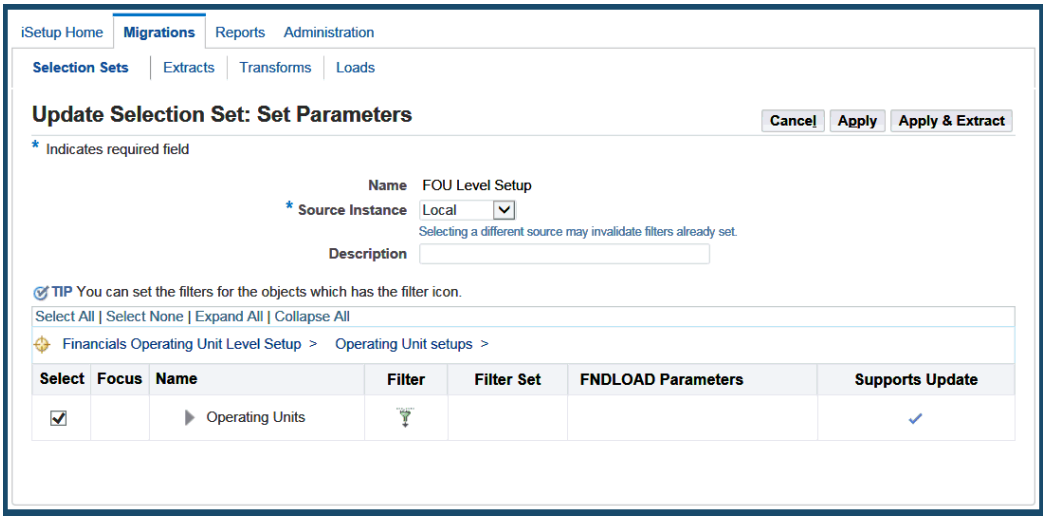
You can update both Standard and Custom Selection Sets.

Updating a Standard Selection Set

You can change the source instance, description, filter criteria, or FNDLOAD parameters (if applicable) for a selection set. However, changing the source instance may invalidate previous filter settings.

- Click **Apply** to save your update.
- Click **Apply & Extract** to save and navigate to the Extract Window.

Selection Set: Update Standard

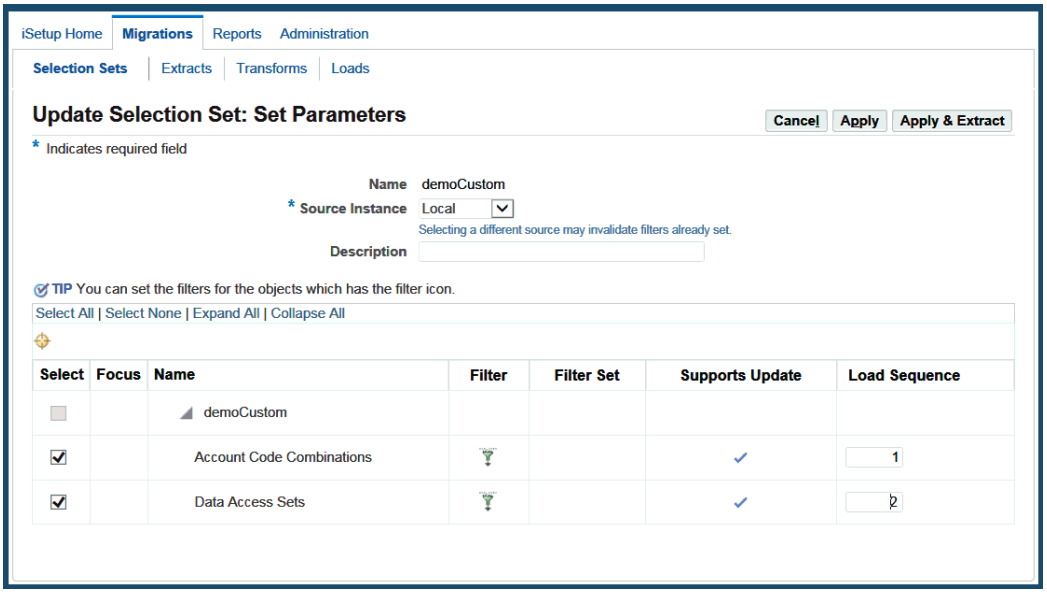


Updating a Custom Selection Set

You can change the source instance, description, sequence, or filter criteria for a selection set. However, changing the source instance may invalidate previous filter settings.

- Click **Apply** to save the update.
- Click **Apply & Extract** to save and navigate to the Extract Window.

Selection Set: Update Custom

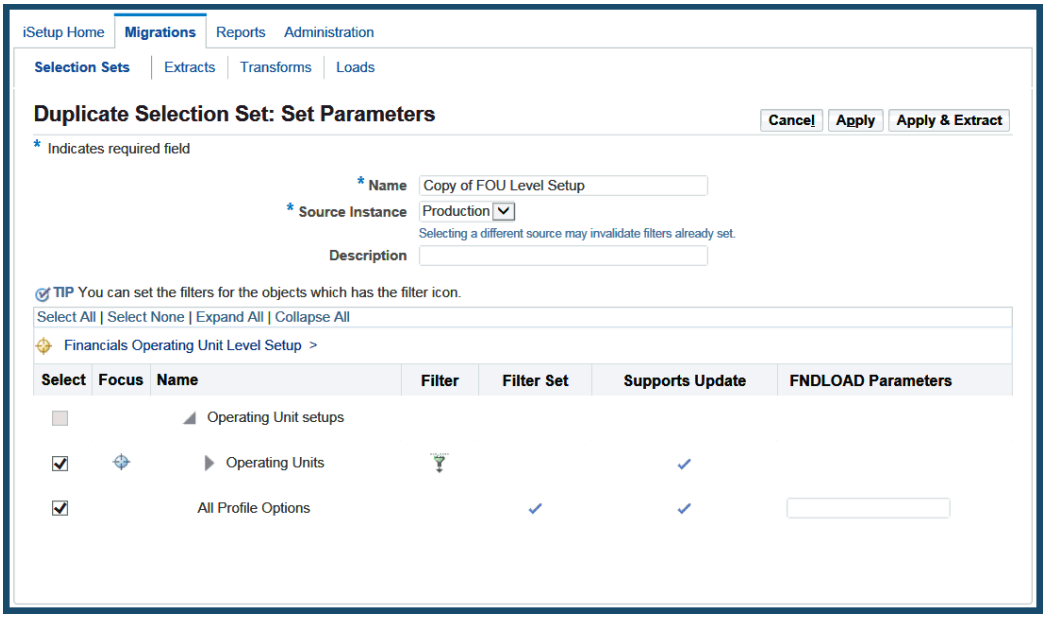


Duplicating a Selection Set

You can create a copy of a selection set, modify it to suit your business requirement and save it as a new selection set. By using the Duplicate feature, you save the time and effort of creating a new selection set with similar criteria.

- Click **Apply** to save the selection set.
- Click **Apply & Extract** to save and navigate to the Extract Window.

Selection Set: Duplicate



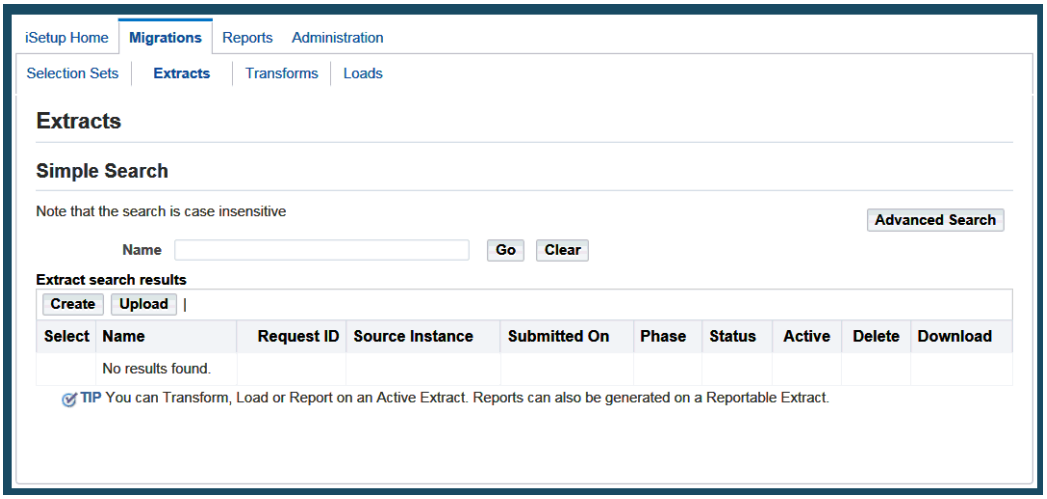
Deleting a Selection Set

You can delete a selection set. Once it is deleted, it cannot be used to extract data from a source instance.

Extracts

An extract is a snapshot of the data that you have extracted from a source instance. You can use the extract to perform migration. You extract data from the source instance using a selection set. You can Create, Upload, Download, Search, View, Transform, Load, or Report on an extract.

Extracts



Prerequisites

You have created a selection set. For more information, see Selection Sets, page 5-1.

Searching for Extracts

You can either do a Simple Search or an Advanced Search.

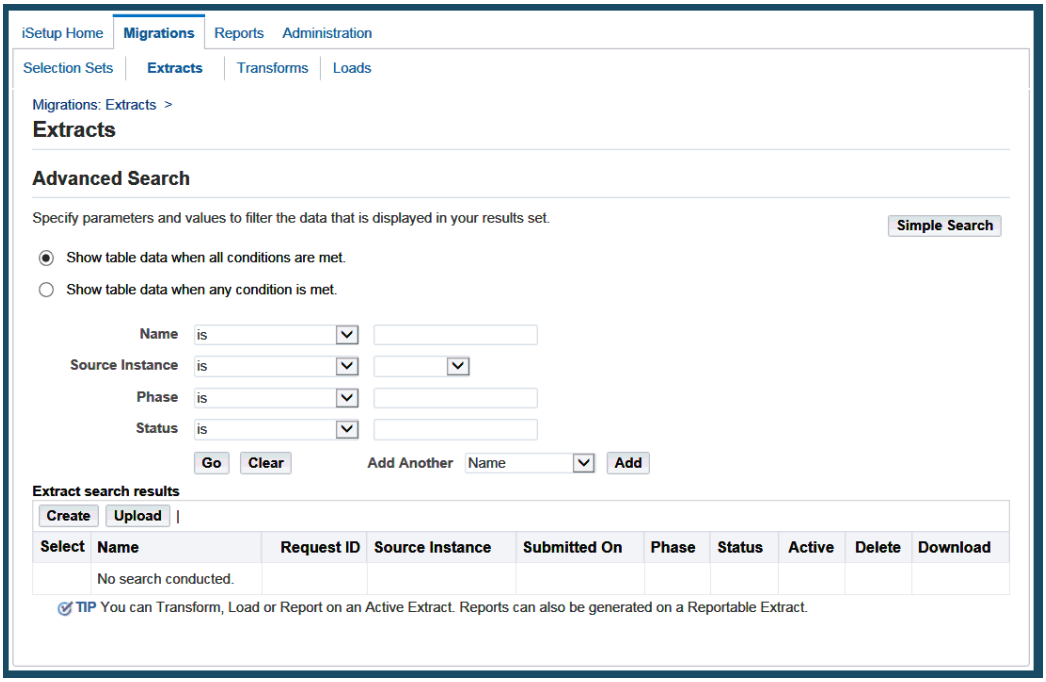
In **Advanced Search**, you can search on the following attributes of an extract:

- Name
- Request ID
- Source Instance
- Phase
- Status
- Submitted On

In addition, you can have the search results match any or all the criteria you specify by selecting an appropriate option.

> **Note:** With extracts, the filter criteria evaluation returns only exact matches. For example, if "DEMO_MGT_USER" is entered as the search criterion, the search results would include only records with the exact string "DEMO_MGT_USER".

Advanced Search for Extracts



Search Results

All extracts that match your search criteria are listed in a table format. Use the search result page to:

- View a list of extracts with name, request ID, source instance, submitted date, phase, extract status, download file, and active status
- View the details of an extract by clicking the name link
- Create an extract by clicking **Create**
- Upload an extract by first selecting an extract and then clicking **Upload**
- Download an extract by clicking the ZIP file
- Delete an extract by clicking an icon
- Transform an active extract by first selecting an extract and then clicking **Transform**
- Load an active extract by first selecting an extract and then clicking **Load**
- Create a report for an active or reportable extract by first selecting an extract and then clicking **Report**

An extract is active if it is of current release with phase as Completed and status as

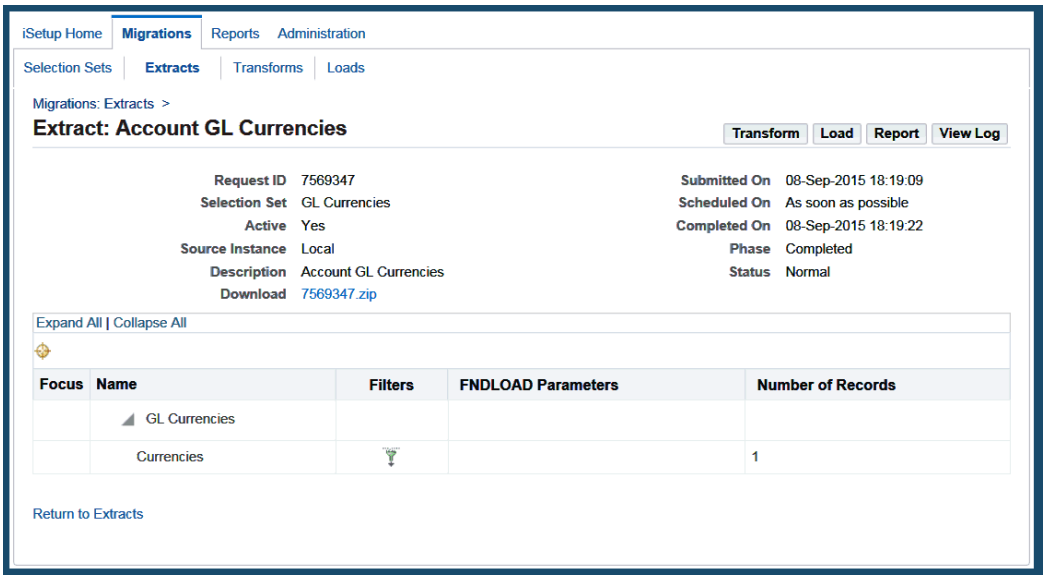
Normal.

> **Note:** The **Report** icon in the Active column indicates this extract contains one or more data objects which can be reported upon.

Viewing an Extract

To view Extract details, click the desired extract name link on the Extracts search results page. This takes you to the Extract Details page which displays read-only extract information such as status, phase, active, download file name, and other details. If the extract completed with a status of Normal, then a list of data objects for the extract is also displayed.

Extract Details



From the Extract Details page, you can:

- View the number of primary records for each extracted data object.

  > **Note:** Record count will be displayed for data objects wherever available.

- View the filters set by clicking the **Filter** icon

  > **Note:** You cannot view filter values if the extracts were created from previous releases. However, the **Filter** icon will appear if the filter had been set.

- View the log information generated during the extract process by clicking **View Log**
- Download the extract
- Transform, load, or report the extract by clicking appropriate buttons if it is an active or reportable extract
  - Transforming an Extract, page 5-21
  - Loading an Extract, page 5-20
  - Reporting from an Extract, page 5-21

  The Active column can have one of the following indicators described in the table below.

Indicators

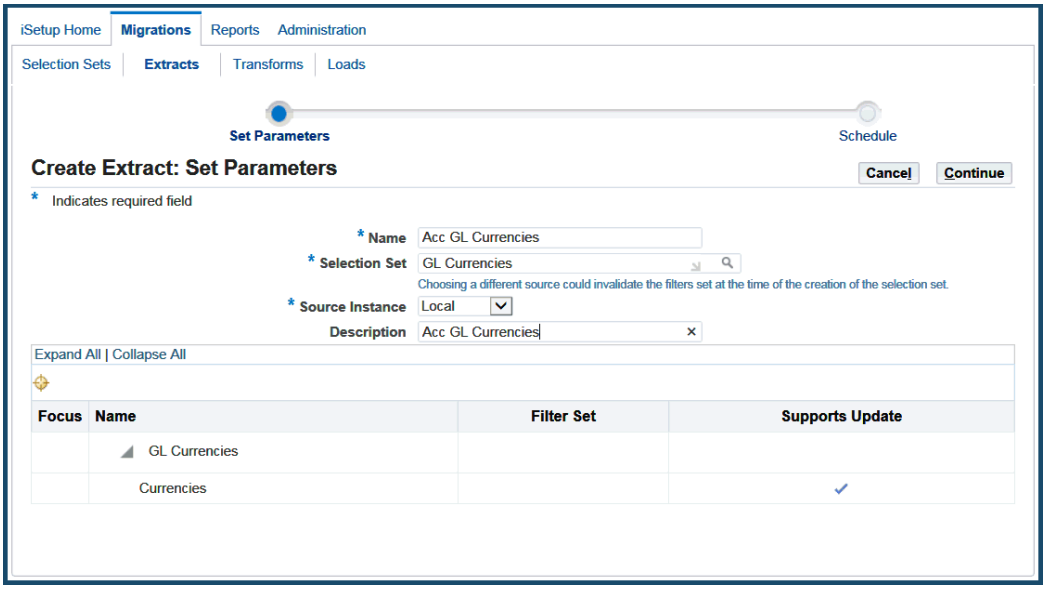
Legend Icon	Description
	This active extract can be used for the Transform, Load, or Report process.
	This extract cannot be loaded or transformed but contains at least one data object which can be reported.
Blank (No Indicator)	This extract is considered to be inactive; therefore, it cannot be used for transform, load, or report. You can view its details or download it.

Creating an Extract

From the Migrations tab, select the Extracts subtab, and click **Create** to create an extract.

Alternatively, select a selection set from the Selection Sets window and click **Extract**. This populates details of the selection set for the Extract process.

Create Extract: Set Parameters



Following are the steps to create an extract:

1. **Name:** Enter a unique name for the extract. This is a required field.

2. **Selection Set:** Select the required selection set for extraction. To do this, click the search icon. This is a required field.

   After a selection, the data objects for the chosen selection set are automatically displayed in a table format.

3. **Source Instance:** Select the source instance from the list. This is a required field.

   Important: If the selected source instance is different from that used at the time of creating the selection set, then some of the filters, if set, may become invalid and may not return any data. By default, the source instance used during creation of the selection set is populated.

   Note: If the language(s) selected in the profile AZ:Export Languages is not present in the source instance, you will get an error.

   The list of languages specified for the extract must include either the target base language or the language 'US' because at least one of these is required to maintain multilingual tables in the target instance.

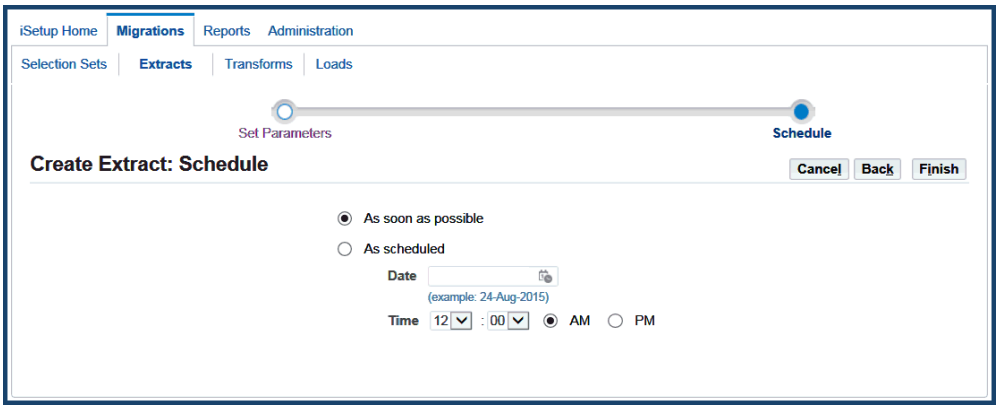
4. **Description:** Provide informative description that could help in identifying the extract.

5. **Filter Set:** Indicate if any filters are set to the data object.

6. **Supports Update:** Indicate if data object interface supports updating the existing record in the target.

7. **Schedule:** Create the extract as soon as possible or schedule it for a later date and time.

Create Extract: Schedule



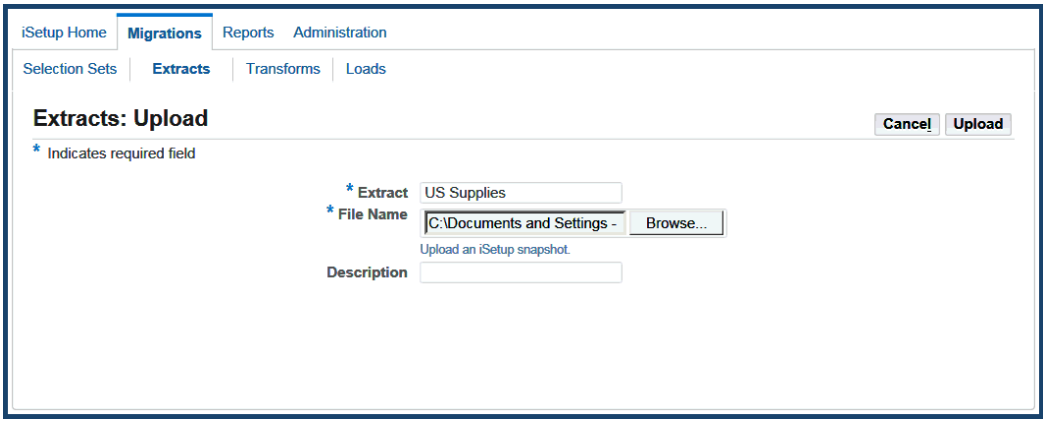
8. **Finish:** Click **Finish** to submit the extract creation process.

   This takes you to the Extract page with a confirmation.

Uploading an Extract

You can upload an extract. The extract could be one that was stored in an external repository or downloaded from another instance. This extract must be an output of an extract process on an instance that was at the same patch set level as the current central instance.

Extracts: Upload



To upload an extract:

1. **Extract Name:** Enter the unique name of the extract to be uploaded.
2. **File Name:** Browse and select the extract file.
3. **Description:** Provide informative description about the extract being uploaded.
4. **Upload:** Click **Upload** to upload the file.

Uploaded extracts are validated for the current release. If the extract is active, then it can be used in the transform, load or report process.

Transforming an Extract

You can submit an extract for transformation. For more information, see Transforms, page 5-22.

Loading an Extract

You can load an extract to a target instance. For more information, see Loads, page 5-31 .

Reporting from an Extract

You can generate a report on an extract. For more information, see Reports, page 6-5.

Deleting an Extract

You can delete an extract by clicking the **Delete** icon.

Note: Loads are dependent on respective extract records. Deleting an extract would result in failure to restart a load dependent on that extract.

Downloading an Extract

You can download an extract by clicking the Download link on the search result page or download it from the Extract Details page.

Transforms

Oracle iSetup allows you to transform extracted data in the following ways:

- Individually transform certain attributes of the data objects in an extract

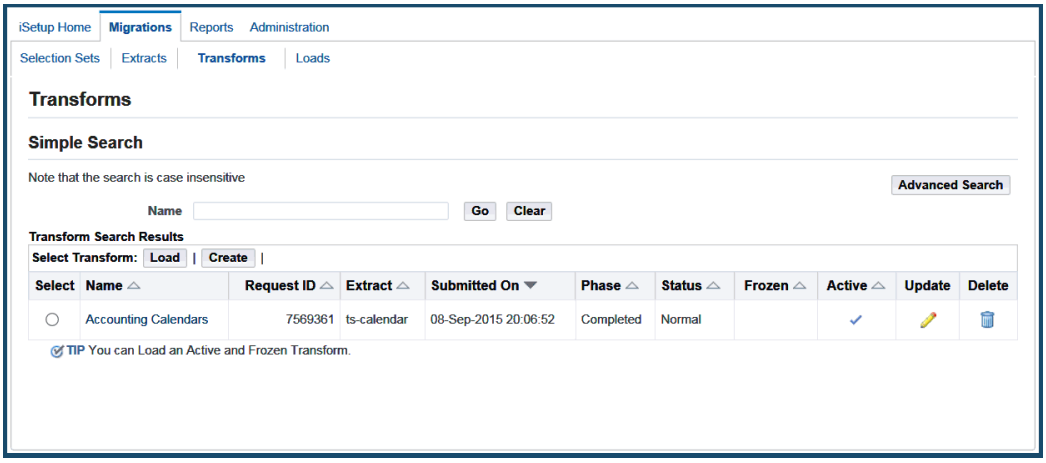
  See: Creating, Updating, and Freezing a Transform, page 5-30.

- Simultaneously transform group of attributes for the data objects in an extract

  See: Transforming All Attributes for a Data Object, page 5-30.

Note: All data objects do not support transformation.

Transforms



Transforming data is a three step process.

1. **Create:** Submit the extract for transformation.
2. **Update:** Modify the attributes of the data objects.

3. **Freeze:** Freeze the transform to prevent any further changes before it is loaded. By freezing a transform, you ensure that it will not be changed while it is being loaded.

   Important: Only frozen transforms can be loaded.

Prerequisites

An active extract which has at least one data object supporting transformation. Refer to Selection Set Templates, page A-1, to get more information on transformable data objects.

Searching for Transforms

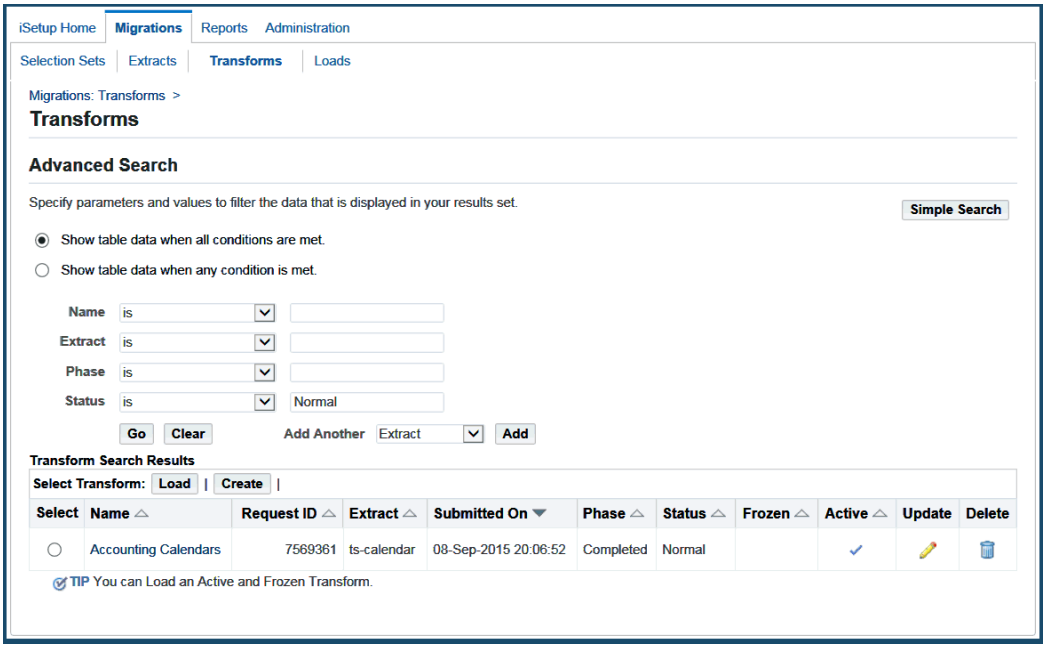
You can either do a Simple Search or an Advanced Search.

In **Advanced Search**, you can search on the following attributes of the transform, which are:

- Name
- Extract Name
- Request ID
- Phase
- Status
- Submitted On

In addition, you can have the search results match any or all the criteria you specify by selecting an appropriate option.

Advanced Search on Transforms



Search Results

All transforms that match your search criteria are listed in a table format. Use the search results page to:

- View a list of transforms with name, request ID, extracts, submitted date, phase, transform status, frozen, and active status
- View the details of a transform by clicking the name link
- Create a transform by clicking **Create**
- Load an active and frozen transform by selecting the transform first and clicking **Load**
- Delete a transform by clicking the **Delete** icon
- Update a transform by the **Update** icon

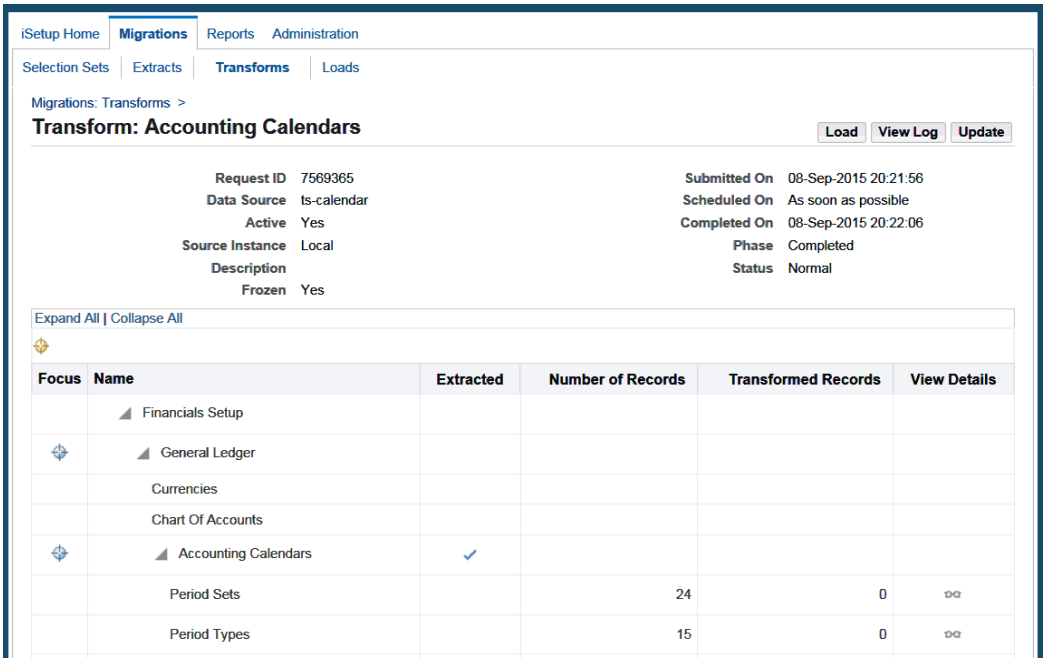
The check in the Active column indicates that the transform is created from an extract of the current release.

Viewing a Transform

To view transform details, click the desired transform name link on the Transforms search results page. This takes you to the Transform Details page which displays read-

only information in the header and a hierarchical view of the data objects. This hierarchical view also displays the number of extracted records and transformed records for the corresponding data objects.

Transform Details



From the Transform Details page, you can perform the following tasks:

- Load the transform if it is active and frozen
- Update the transform if it is not frozen
- View the transform log to see the log information generated during the transformation
- View data object details by clicking the **View** icon of the data object you want to view

  The object details page allows you to view a list of records that comprises the selected data object and the contents of each record with extracted value and transformed value. You can have an option to view all the data objects or only the transformed data objects.

Creating, Updating, and Freezing a Transform

To transform certain attributes of a data object in an extract, you can initiate the transform process in either of the following ways:

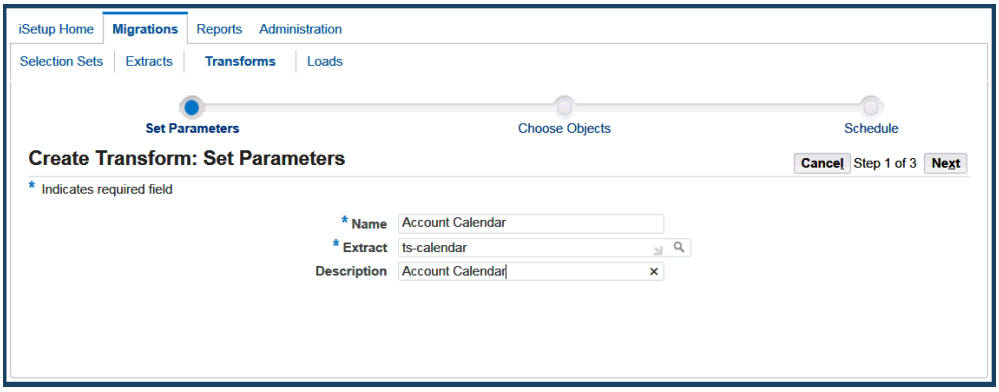
- From the Migrations tab, select the Transforms subtab, and click **Create** to create a transform.

- From the Migrations tab, select the Extracts subtab. Select an extract and click **Transform** or click **Transform** on the Extract Details page.

Following are the steps to create, update and freeze a transform:

1. **Creating a Transform**

Create Transform: Set Parameters



Following are the steps to create a transform:

1. **Name:** Enter a name for the transform. This is a required field.

2. **Extract:** Select the required extract. You can perform a search to locate available extracts. This is a required field. Only active extracts will be displayed for selection.

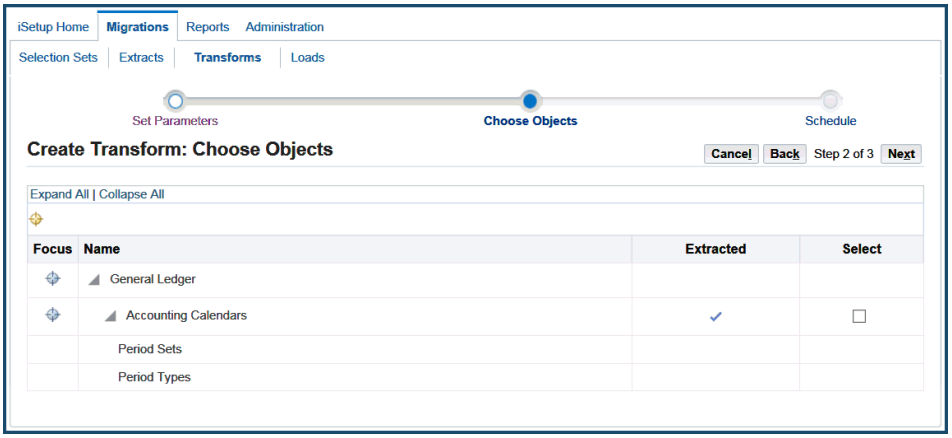
   If this process is initiated from the Extracts page, details of the extract are populated.

3. **Description:** Provide informative description that could help in identifying the transform.

4. Click **Next**. This takes you to the Create Transform: Choose Objects window if the extract contained at least one transformable object.

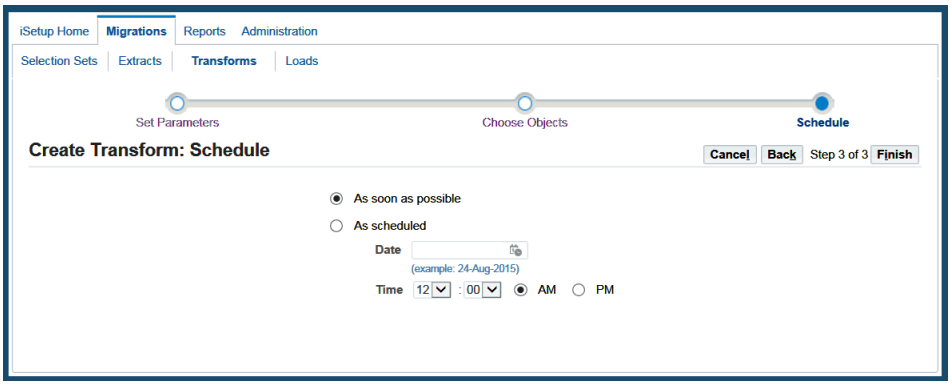
5. **Choose Objects:** Select the objects on which you want to perform transformation.

Create Transform: Choose Objects



6. **Schedule:** Create the transform as soon as possible or schedule it for a later date and time.

Create Transform: Schedule



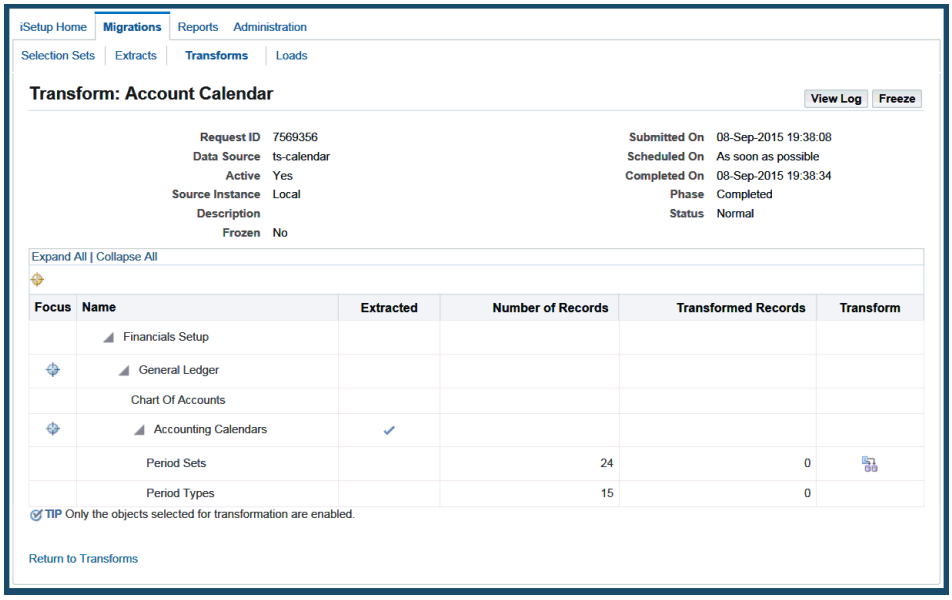
2. Updating a Transform

The **Update** icon is enabled for active transforms only. You can update the data within the transform by clicking the **Update** icon.

Following are the steps to update the transform:

1. Click the **Update** icon of the required transform. This takes you to the update page of that particular transform.

Update a Transform

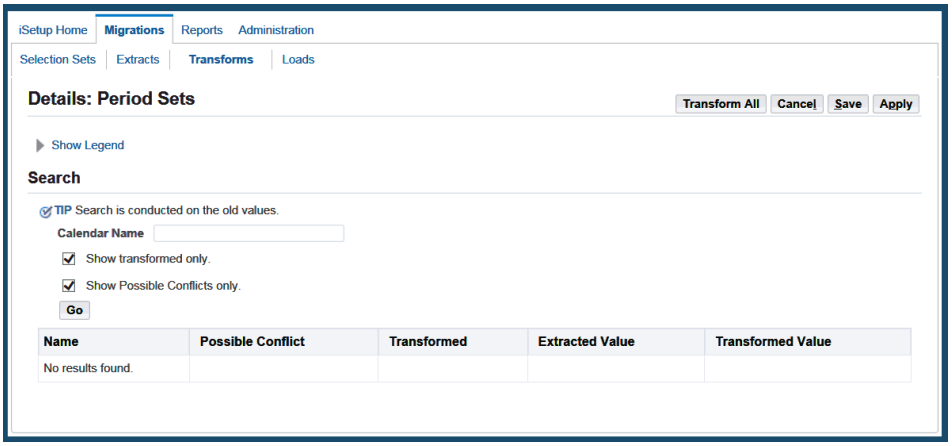


Note: If the transform is frozen, you must unfreeze it for updates.

2. Click the **Transform** icon of the data object that you want to transform. Only data objects marked for transform, during creation, are enabled. This takes you to a detail page where you can:

   - Search for the record to be transformed by using some attributes of the data object.
   - Enter the new values for attributes that allow transformation against the existing values.
   - Access the Transform All page where you can mass modify a specific attribute of all the records for an data object in one step. See: Transforming All Attributes for a Data Object, page 5-30.
   - Save the transform by clicking **Save** and continue to transform other records. On **Apply**, the details page displays the transformed data objects and the number of records that have been transformed.

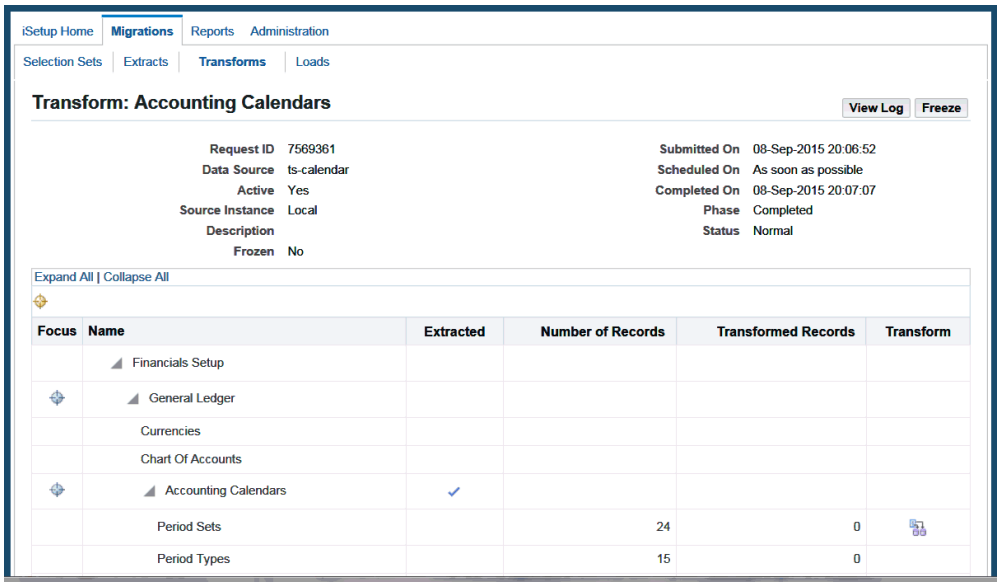
Details: Period Sets



3. Freezing a Transform

Freezing a transform prevents any further changes to the transform. By doing this, you ensure that the selected transform will not be changed during the load process.

Freeze a Transform



Following are the steps to freeze a transform:

1. From the Migrations tab, select the Transforms subtab, and click the **Update** icon of the transform. This takes you to the Update page of the transform.

2. Click **Freeze**.

Note: You can also unfreeze a frozen transform from the Update page. If a transform is unfrozen and changes are made to it, you cannot restart the dependent load which was submitted on the frozen transform.

Transforming All Attributes for a Data Object

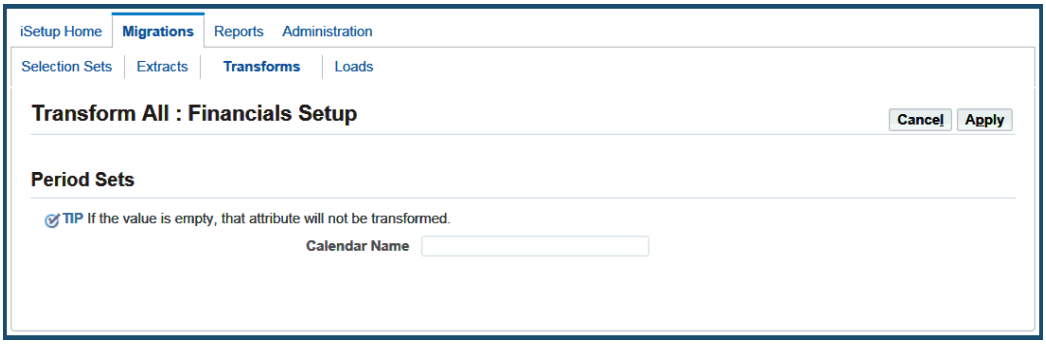
Instead of transforming data object attributes row by row, you can use the Transform All feature to mass modify a specific attribute of all the records for a data object simultaneously. If the object to be transformed is a hierarchical selection set, then all values set at the parent level will be cascading down to the child data objects.

The Transform All window lists transformable attributes. You can enter values for these attributes of the selected data object and submit the request to transform them all at once. This immediately launches a concurrent request and it cannot be scheduled. While the Transform All request is in progress, the transform will be frozen. Once the request is completed, changes made with Transform All are not reversible. Transformed records will be equal to the total number of extracted records.

Note: The values you enter for transformable attributes cannot all be empty (null). You must enter at least one attribute in order to submit the Transform All request.

This feature can only be used in the update mode and the transform must be in unfrozen state.

Transform All Page



Use the following steps to access the Transform All page:

1. From the Migration tab, select the Transform subtab. Select a Transform from the transform search results region and click **Update** to access the Transform Details page.

Note: You can also click the transform name link from the search results region to get to the view only Transform Details page and then click **Update** to enable the **Transform** icon and **Freeze** button.

2. Click the **Transform** icon for a specific attribute in the Transform Details page to access the Attribute Details page.

3. Click **Transform All** to access the Transform All page. The selected attribute name displays as the region name.

4. Enter an appropriate value for this attribute and click **Apply** to submit the request. You are directed back to the Transform Search page with confirmation of the request submitted.

Loading a Transform

You can load a transform from either the Transforms page or the details page of a particular transform.

Note: Only a frozen and active transform can be loaded.

Deleting a Transform

Click the **Delete** icon in the Transforms page to delete a transform. This takes you to the Warning page where you must confirm the delete action. Once you confirm the deletion, you return to the Transforms page.

Additional Information: After deleting a transform, you cannot restart any dependent loads.

Loads

You can load an extract or a frozen transform to the target instance.

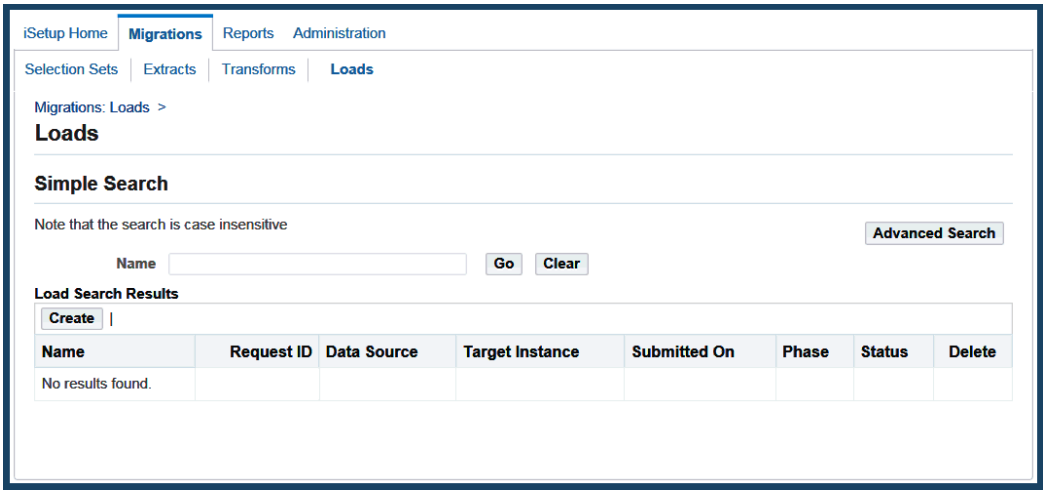
The database character set of the extract or the frozen transform must match the database character set of the target instance.

Note: If there is a mismatch of the data's language(s) in the extract (or transform) and the languages installed in the target, you will get an error message. For example, if the extract contains Japanese data from the source instance but the target instance does not have the Japanese language installed, you will get an error when you try to load the

extract.

Note: After you load an extract, run adadmin:"Maintain multilingual tables" as a post-migration step.

Loads



Searching for Loads

You can either do a Simple Search or an Advanced Search.

In **Advanced Search**, you can search on the following attributes of load:

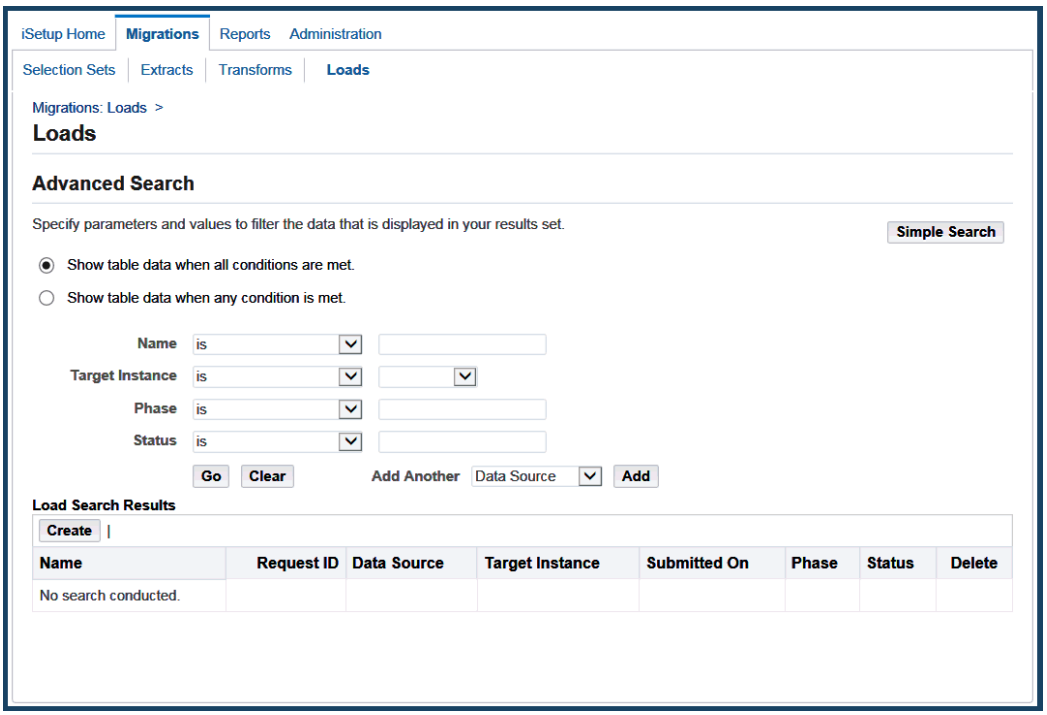
- Name
- Target Instance
- Phase
- Status
- Data Source
- Request ID
- Submitted On

Note that you can add specific search criteria; for example, you can search on an additional name.

You can have the search results match any or all the criteria you specify by selecting an

appropriate option.

Advanced Search for Loads



Search Results

All loads that match your search criteria are listed in a table format. Use the search results page to:

- View a list of loads with name, request ID, data source, target instance, submitted date, phase, and status

  The possible values in the Status field are Pending, Running, Warning, Normal, and Error.

- View the details of a load by clicking the name link
- Create a load by clicking **Create**
- Delete a load by clicking the **Delete** icon

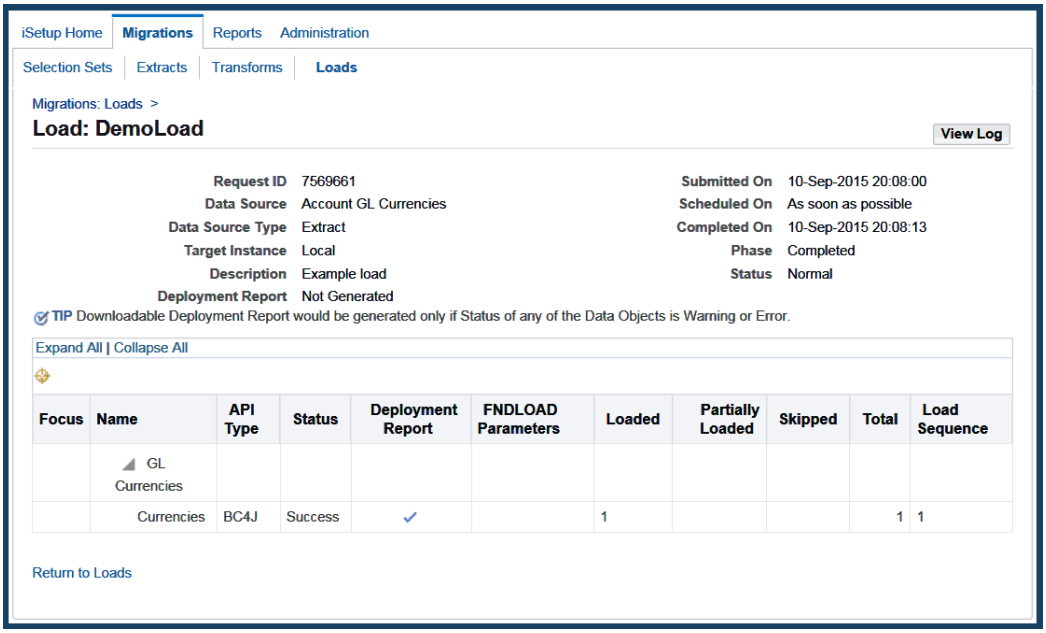
Viewing a Load

To view existing loads, click the desired name link on the search results page. This takes you to the Load Details page which displays read-only information for the load, such as load status, phase, and data source type, as well as a hierarchical view of the load status for each data object.

The hierarchical view lists the following information for each data object, as applicable:

- API Type
- Status - Status of deployment for the particular entity.
- Deployment report - whether deployment report has been selected for this data object
- FNDLOAD Parameters
- Loaded - number of records loaded successfully.
- Partially Loaded - number of records loaded with business validation exception at current or child level.
- Skipped - number of records skipped as a result of errors.
- Total - total number of records.
- Load Sequence

Load Details



If the load is completed, you can see load details by clicking **View Log**. Click **Refresh** if the status for the load is scheduled.

The downloadable deployment record gets generated only if any of the data objects selected for Deployment report generation have errors or warning. However, the report

always contains an index.html file providing detailed summary of the load status. It lists the number of records created, created with warnings, updated, updated with warnings and skipped due to errors. If there are warnings or errors, this document also has links to the deployment report of each data object.

The deployment report contains lists the following details for each record that was not loaded as a result of warning/exception.

1. **ID/Parent ID:** A separate Microsoft Excel file is generated for data object. The ID and PID are provided to match the records in the child data object file to their corresponding primary records in the parent data object file. The child records in the child data object deployment report have a PID value equal to the ID of the parent data object record in the parent deployment report Microsoft Excel file.

2. **Status:** This column gives the reason why these records were loaded or not loaded with warnings. The reasons could be any of the following:

   - **Created - One or more child records were skipped:** The primary record has been loaded. However, some of the child records were not inserted due to errors.

   - **Updated - One or more child records were skipped:** The primary record has been updated. However, some of the child records were not inserted or updated due to errors.

   - **Skipped - One or more records had errors:** One or more records had errors and 'Commit if Warning' is set to False. Therefore, the current record was skipped without processing and the load resulted in an error.

   - **Skipped - Business validation error**: This record was not loaded due to a business validation error. This record was skipped but this error will not cause the load to error out.

   - **Skipped - One or more child records had errors:** One of its child records encountered a fatal exception and the load failed.

   - **Skipped - Error:** This record had a fatal exception and the load failed.

   - **Skipped - 'Update Records' was not enabled:** Exclusive Insert option was set to True by a user. A record was found in the target instance having the same primary keys as the record to be loaded, causing the insert to fail.

3. **Log Message:** Gives the actual exception encountered when loading this record.

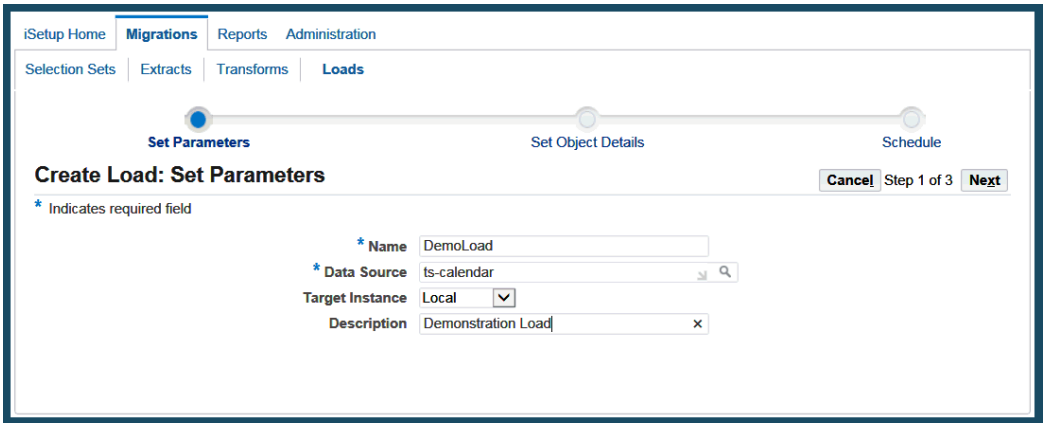
4. **Data Columns:** The rest of the columns list the data in the record that was to be loaded.

Creating a Load

From the Migrations tab, select the Loads subtab, and click **Create** to create a load. You can also initiate this process by:

- Clicking **Load** from the Extracts Search page or the Extract Details page.
- Clicking **Load** from the Transforms Search page.

Create Load: Set Parameters



Following are the steps to create a load:

1. **Name:** Enter a unique name for the load. This is a required field.
2. **Data Source:** Select a data source (an extract or a transform) from a search. Only active extracts and transforms will be displayed for selection. This is a required field.
3. **Target Instance:** Select the Target instance from the pick list.
4. **Description:** Provide informative description that could help in identifying the load.
5. **Update Existing:** Select the data objects that you want to overwrite during load. By default, this is checked for objects that support update.
6. **Deployment Report:** Select the data objects for which you want the Deployment report to be generated. The Deployment report is a downloadable Microsoft Excel sheet generated for each API that has warnings or errors. The status of the data objects in the report gives you information on why the warning or error occurred during the load process.
7. For a load using an FNDLOAD API, you can enter FNDLOAD parameters. These

parameters are passed when the load is submitted.

The following FNDLOAD parameters are supported:

- DOWNLOAD_PASSWORD=YES
- UPLOAD_PASSWORD=YES
- CUSTOM_MODE=FORCE
- UPLOAD_MODE=REPLACE
- UPDATE_USER=Y
- UPLOAD_MODE=NLS
- WARNINGS=TRUE

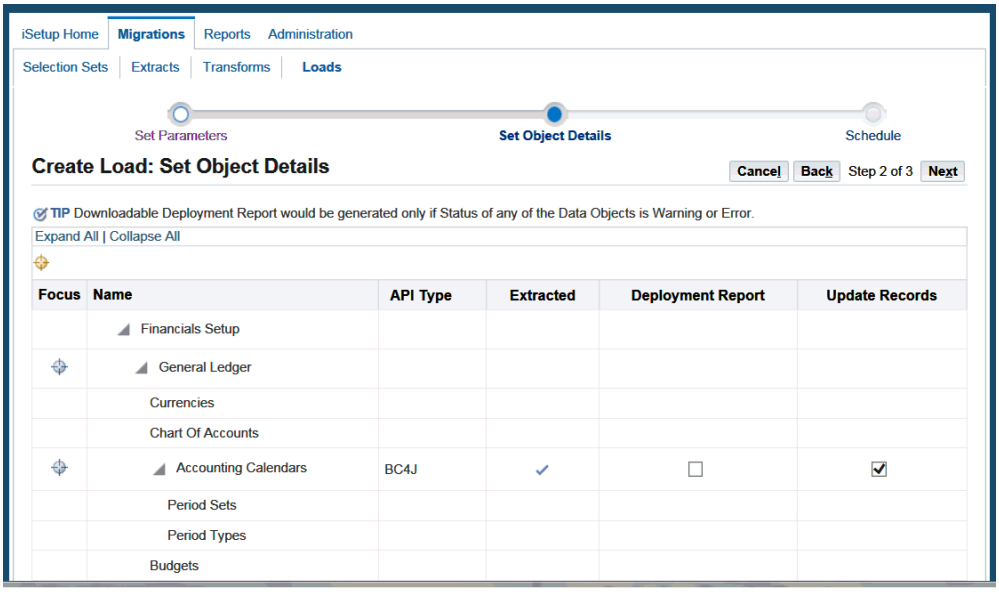
Multiple parameters can be entered, separated by a space. For example,

```
UPLOAD_MODE=NLS WARNINGS=TRUE
```

A parameter can be entered with spaces. For example, `CUSTOM_MODE=FORCE` and `CUSTOM_MODE = FORCE` are both valid.

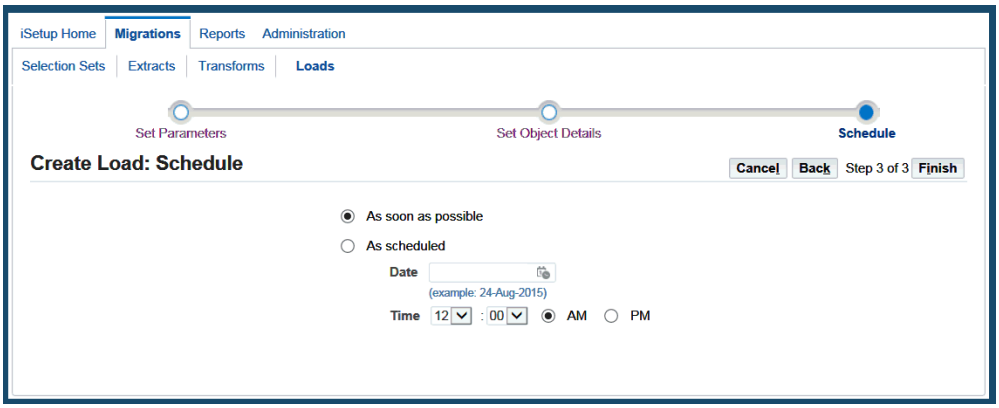
8. **Sequence:** If the extract being loaded was created from a custom Selection Set, the additional sequence column is also displayed. This allows you to modify the order of the data objects being loaded. By default, this column will be populated with the sequence specified by the user when the selection set was created. However, you can edit it to reflect the order in which you want the data objects to be loaded.

Create Load: Set Object Details



9. **Schedule:** Create a load as soon as possible or schedule it for a later date and time.

Create Load: Schedule



Note:

- The load is only allowed on extracts that are active and in Completed phase with a status of Normal.

- A transform has to be active and frozen, as well as in Completed phase with a status of Normal to initiate a load process.

- Some of the data objects must be updated during load and the Update flag would be checked for these data objects by default.
- Some data objects do not support updates.
- Language data will be uploaded when the following conditions are met:

  `LDT LAST_UPDATE_DATE` is greater than or equal to `DB LAST_UPDATE_DATE` - in which the upload parameters are implicitly specified by automatic language detection when language is non-US.

  or

  `LDT LAST_UPDATE_DATE` is greater than or equal to `DB LAST_UPDATE_DATE` - in which the upload parameters are explicitly set by the user from the UI regardless of the current session language.

Restarting a Load

You can restart the load process if the current process ends in error. However, if an extract or a transform associated with the load has been deleted or the associated extract becomes inactive in the process of upgrade from earlier releases, then the Restart option will not appear for that particular load even though the load process completes with a status of Error.

Following are the steps to restart a load:

1. From the Migrations tab, select the Loads subtab, and select the load which resulted in an error.

   This takes you to the details page of the load.

2. Click **Restart**.

   This takes you to the Set Parameters page where you specify a Name and Description for the load.

   Here you have two options:

   - To restart from the failed step: The application will start running from the API that resulted in an error. You must use this option if you have corrected the reason of the error in the target instance.
   - Skip failed step and its dependencies: The application skips the load for the data object that resulted in an error and its dependent data objects.

3. Click **Continue**.

   This takes you to the Schedule page where you can schedule the load.

Deleting a Load

Click the **Delete** icon in the Loads page to delete a load. This takes you to the Warning page where you must confirm the delete action. Once you confirm the deletion, you return to the Loads page.

6

Reports

This chapter describes how to create, view, and download Standard and Comparison reports.

This chapter covers the following topics:

- Overview
- Managing Report Preferences
- Standard Reports
- Comparison Reports

Overview

Oracle iSetup Reporter takes extracted data as input to generate standard reports and comparison reports. You can choose the data objects to generate the desired report and view the report online or download it as PDF, RTF, or Excel formats. The report online view also allows you to search for a record from within the report.

Managing Report Preferences

Use these pages to create, update, and view your preferences for reports.

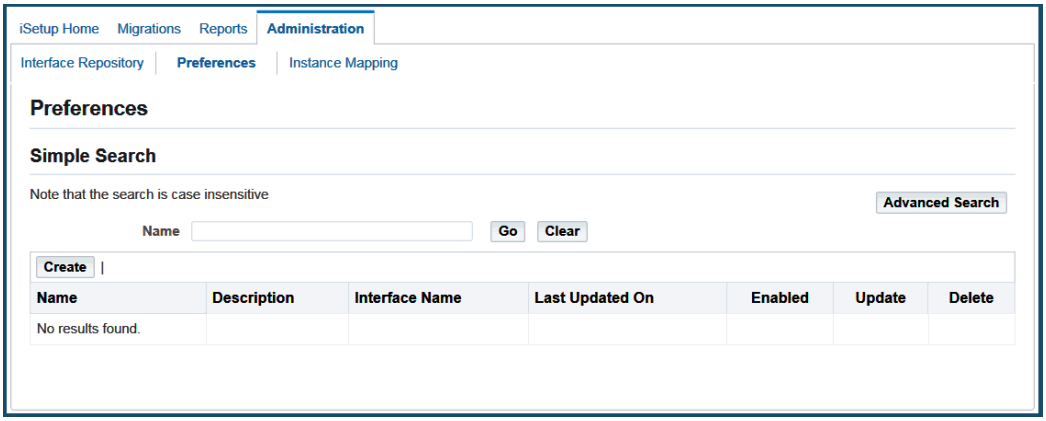
Searching for Preferences

Search for a personalization based on a user's name. The results of such a search will be the preferences set by that user. The results table will list:

- Name
- Description
- Interface

- Last Updated On
- Enabled
- Update (icon)
- Delete (icon)

Search for Preferences



Creating a Preference

1. Click the **Create** button to create a preference.
2. Enter the following for your preference:
   - Name - Name of the preference.
   - Enabled - Check this box to enable the preference.
   - Interface - This LOV lists only those APIs that are not personalized.
   - Description

     Note: The Personalization name must be unique for a user.

Based on the API picked in the LOV above, the HGrid will be rendered with the following columns:

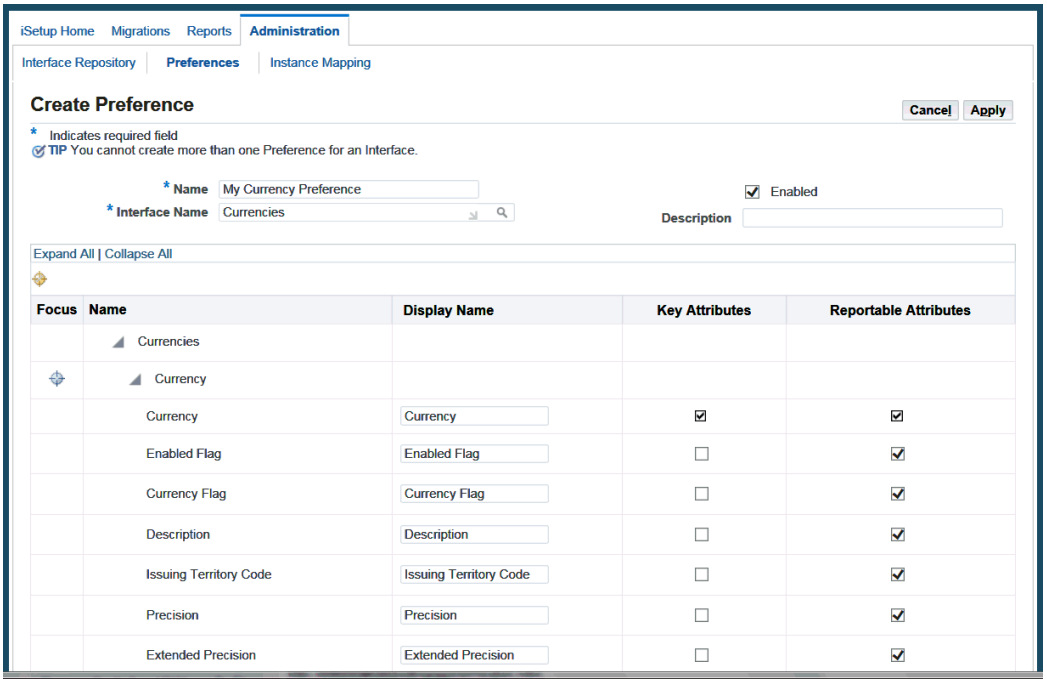
- Name: The name of the sources intended with the attributes owned by the corresponding source.
- Display Name - Displays the user defined name for attributes

- Key Attributes - This box is read-only for developer-marked keys; users are not able to update this. To add key attributes, users can check the box and add the key attributes.

- Reportable Attributes - By default all attributes are checked. Uncheck this box to prevent an attribute from appearing in reports. Developer-marked key attributes appear as read-only.

  Note: An attribute that is checked as a Key Attribute must be checked as a Reportable Attribute.

Create Preference

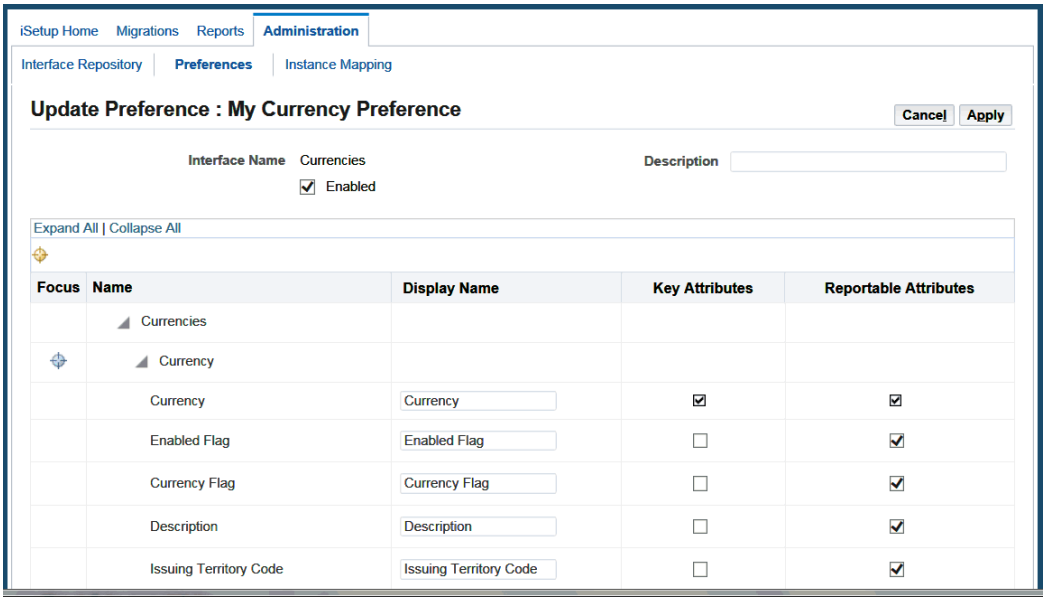


Updating a Preference

From the Search Results table, you can navigate to this page using the Update icon for a selected preference.

You can update all the fields for a preference except for Name and Interface.

Update Preference



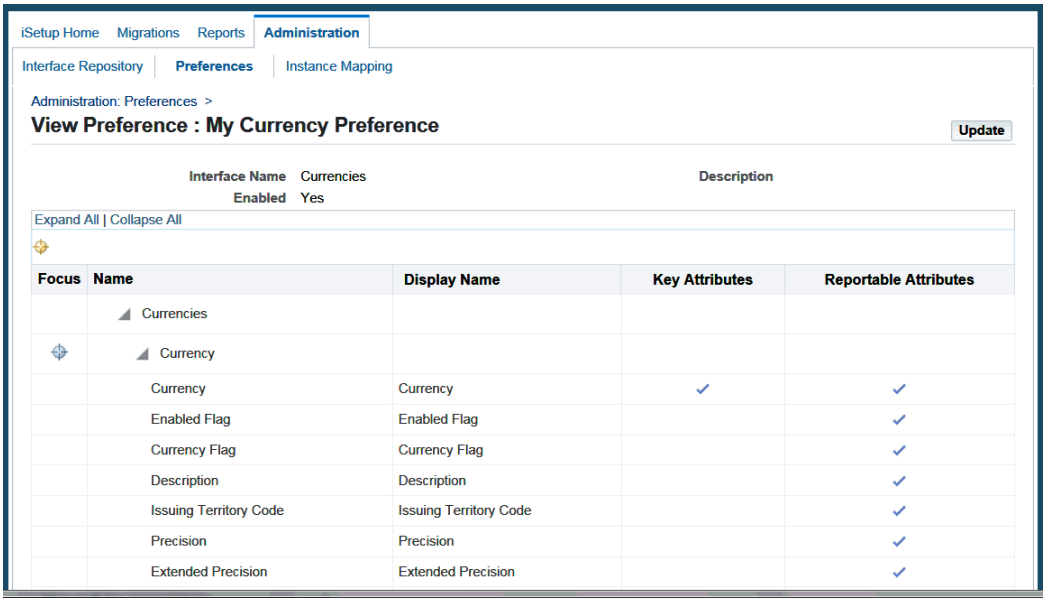
Deleting a Preference

Use this page to delete a preference. From the Search Results table, you can navigate to this page using the Delete icon for a selected preference.

Viewing a Preference

This page provides details for a preference. From the Search Results table, you can navigate to this page by clicking on the link provided for a preference.

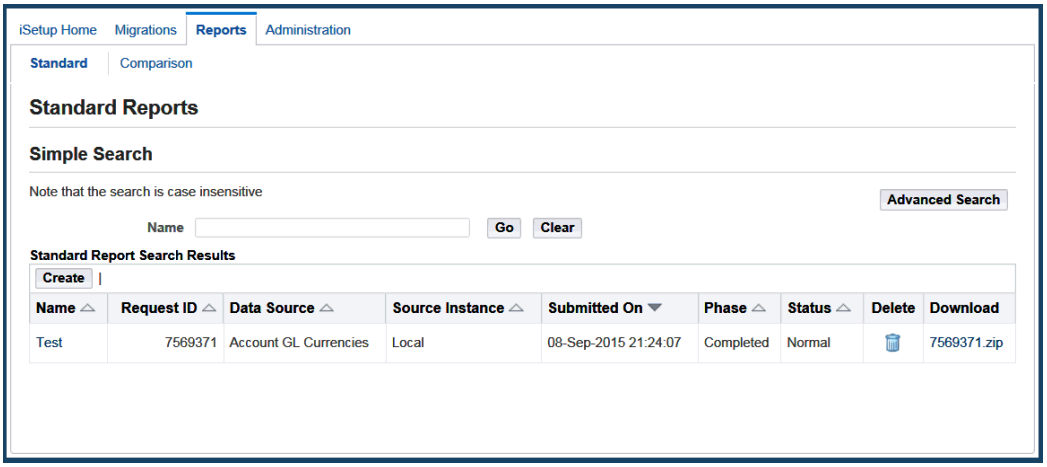
View Preference



Standard Reports

Standard Reports are generated for a single extract.

Standard Reports



Searching for Standard Reports

You can either do a Simple Search or an Advanced Search.

In **Advanced Search**, you can search on the following attributes of the standard report:

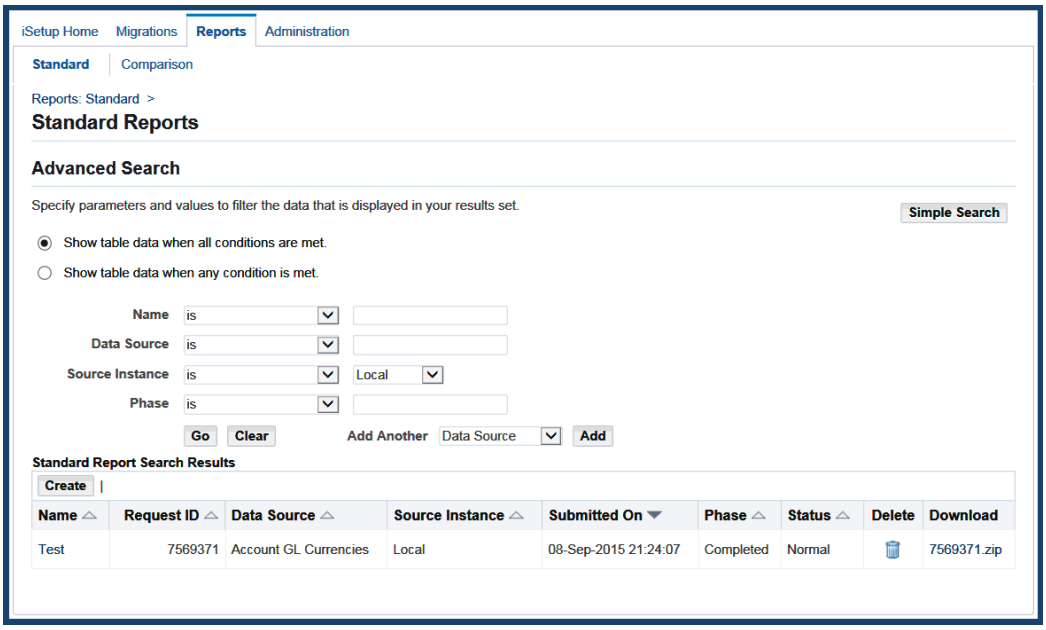
- Name
- Request ID
- Data Source
- Source Instance
- Submitted On
- Phase
- Status

In addition, you can have the search results match any or all the criteria you specify by selecting an appropriate option.

The report can be deleted by clicking on the Delete icon.

If the downloadable report option was chosen, a link appears in the Download column. Use this link to download the generated report in the form of a ZIP file.

Advanced Search for Standard Reports



Search Results

All standard reports that match your search criteria are listed in a table format. Use the search results page to:

- View the details of a selected report

- Create a standard report by clicking **Create**
- Download a report by clicking on the ZIP file link

  Note: This option is only available for reports where a download format was specified during report generation.

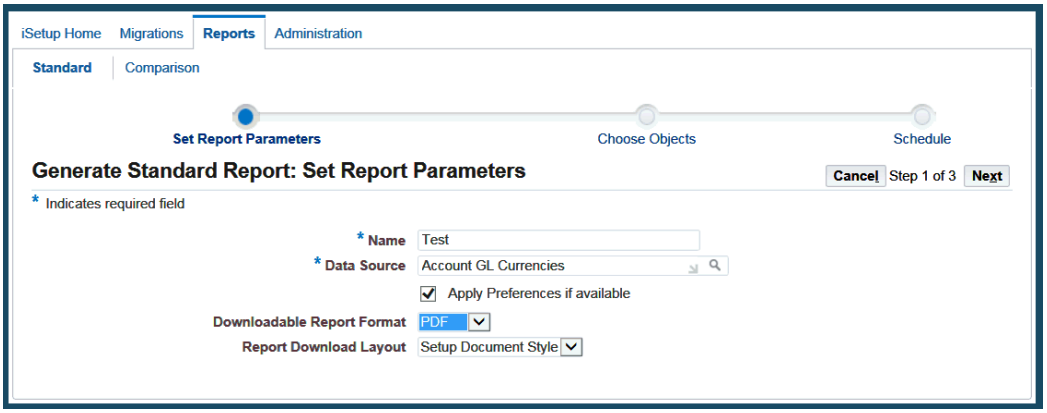
- Delete a report by clicking the **Delete** icon

Creating a Standard Report

You can initiate a standard report create process either by:

- Clicking **Create** in the Standard Reports page from the Standard subtab on the Reports tab.
- Selecting an extract on the Extracts Search page and clicking **Report**.
- Clicking **Report** on the Extract Details page.

Create Standard Report: Set Report Parameters



Following are the steps to create a standard report:

1. **Name:** Enter a unique name for the report. This is a required field.
2. **Data Source:** Select a Data Source for the report from a search. This is a required field.

   Note: The extract must have Phase as Completed, Status as Normal, and must be Active status or have one or more data objects enabled for reporting. When the creation is initiated from the Extracts

Search or the Details page, this information is populated.

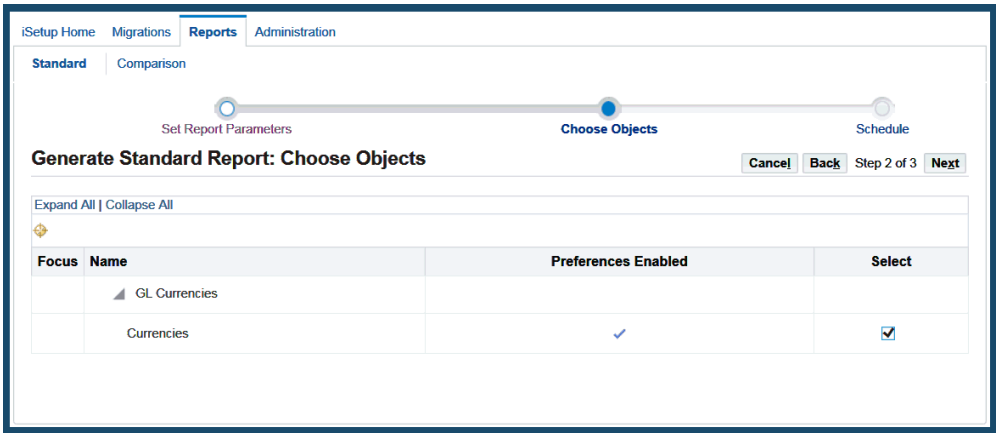
3. **Downloadable Report Format:** In addition to the online report, you can also select the format for a downloadable report. You can download the report as a .PDF, .RTF, or .XLS. The recommended format is PDF.

4. **Report Download Layout:** You can also choose one of the two downloadable layouts, Hierarchical or Setup Document Style (BR-100 style document). This dropdown list is available only if 'PDF' or 'RTF' is chosen as the report download format.

5. **Apply Preferences if Available:** If one or more interfaces in the extract have preferences configured for them, checking this box will apply those preferences while generating the report. On the same note, if this box is not checked, the user-configured preferences will not be applied on the interfaces during report generation.

6. Click **Next**. Based on the extract selected, a list of data objects is displayed. Select at least one data object for reporting.

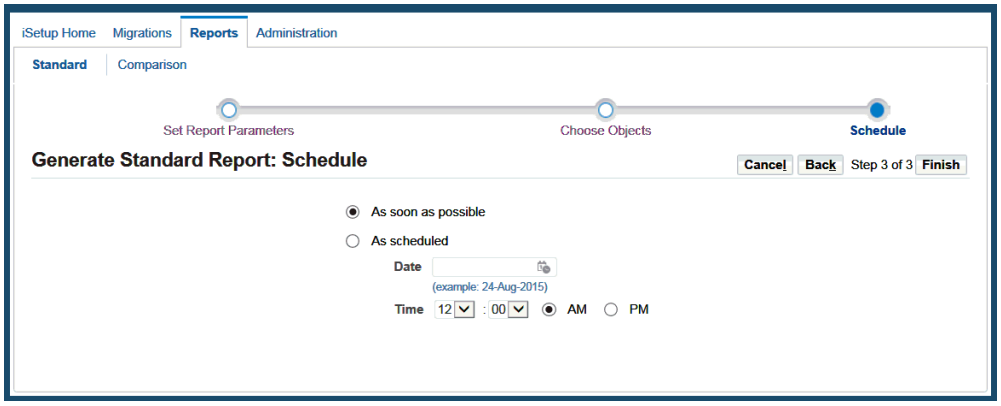
Generate Standard Report: Choose Objects



7. **Preferences Enabled:** This column displays a tick icon corresponding to those interfaces for which preferences will be applied. This column appears only if the 'Apply Preferences if Available' box on the previous page is checked.

8. **Schedule:** Create the standard report as soon as possible or schedule it for a later date and time.

Generate Standard Report: Schedule



9. **Finish:** Click **Finish** to submit the report creation process.

   This takes you to the Standard Reports Search page with a confirmation.

Viewing a Standard Report

Click the desired standard report name to view the details of a report.

This view displays the data objects that were part of the data source. The **View** icon is enabled only for the objects that were selected for the report.

While the report is being generated, the **View** icon maybe disabled for objects which are being processed. This view also displays the number of records contained in each data object.

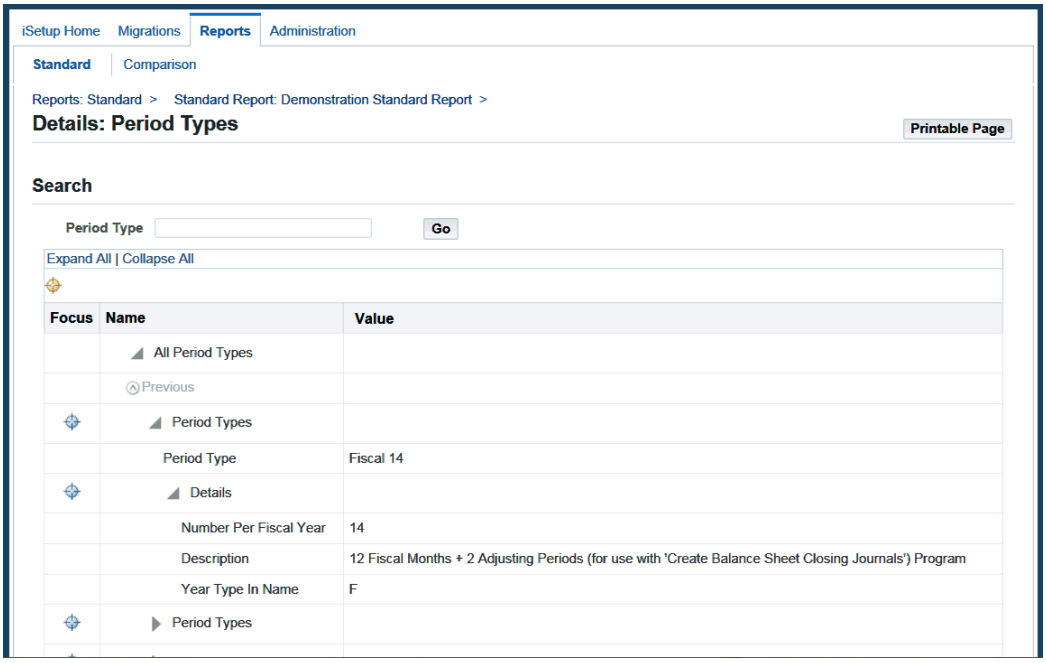
Refresh: Refresh the page to get the current status. The **Refresh** button appears as long as the status of the report is not Complete.

View Log: Click **View Log** to see the log generated during the generation of this report.

Online Report Layout: Use this dropdown list to choose a Hierarchical view or Tabular view of the online report. Click the View icon in any of the interfaces to view the online report.

Hierarchical Layout: Records are displayed in a hierarchical fashion. You can search for a record by using the available search criteria and clicking Go.

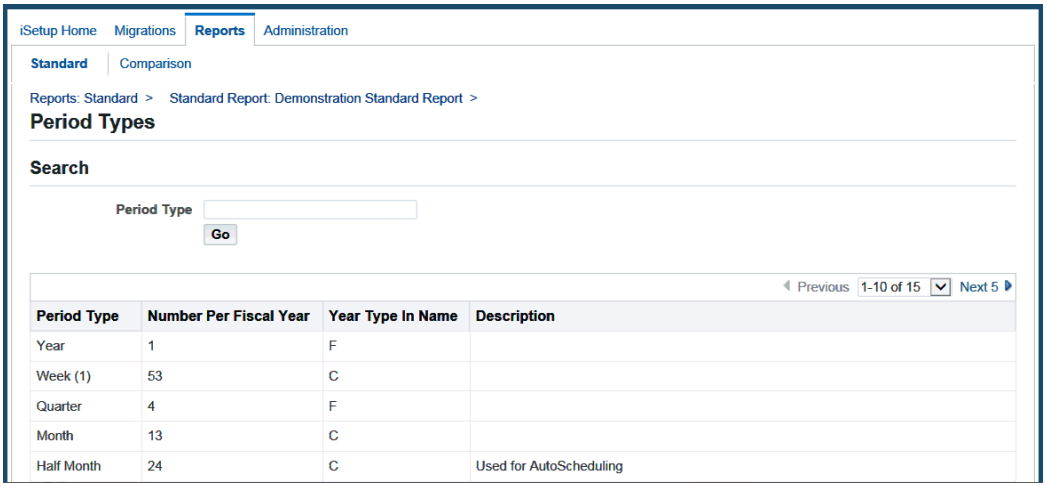
Hierarchical Layout



Tabular Layout: In a tabular layout:

- Records are displayed in a tabular format.
- The detail records for each primary row are also listed in the last few columns of the table.
- Clicking on the detail records takes the user to the detail level, listing all the detail records of that primary record in the form of a table.
- The primary level record is also displayed in a hide-show region.
- You can navigate to any of the primary records in the hierarchy by clicking the locator links generated on top of the page.
- You can also search at each level using the available search criteria and clicking Go.

Tabular Layout



Note: The online report retrieves records based on the profile option AZ: Reporter Max Records, which can be set to a maximum of 200. To restrict your search use the search filters available on the Report Details page.

Click **Printable Page** for a print version of the standard report.

Downloading a Standard Report

If you had specified a download format for the report, a ZIP file containing the downloadable report is available on the Standard Reports Search page. Click the Download link for the required report. You can also download the report from the Standard Report Details page.

Note: The download capability is available if:

- A download format was specified during creation of a standard report.
- The report is generated without any errors and the Phase is Complete and the Status is Normal.

The downloaded file name is the report Request ID and is generated by the system.

The downloaded ZIP file contains the following files and folders:

- **File *index.html*:** This file contains details of the request such as the report name, date of submission, data source name, preferences enabled. It also contains details

of the hierarchy of objects in the selection set with the number of records for that data object. The **View Detail** icon takes you to the report for the data object.

- **Folder *Publishedfiles*:** This folder contains the different object reports.
- **Folder *index_files*:** This folder contains images that appear in the `index.html` file.

Once you have downloaded the report, you need to extract the contents to a folder. Open the `index.html` file to access the report.

> **Note:** It is recommended that you navigate to the reports through the links in the `index.html` file.

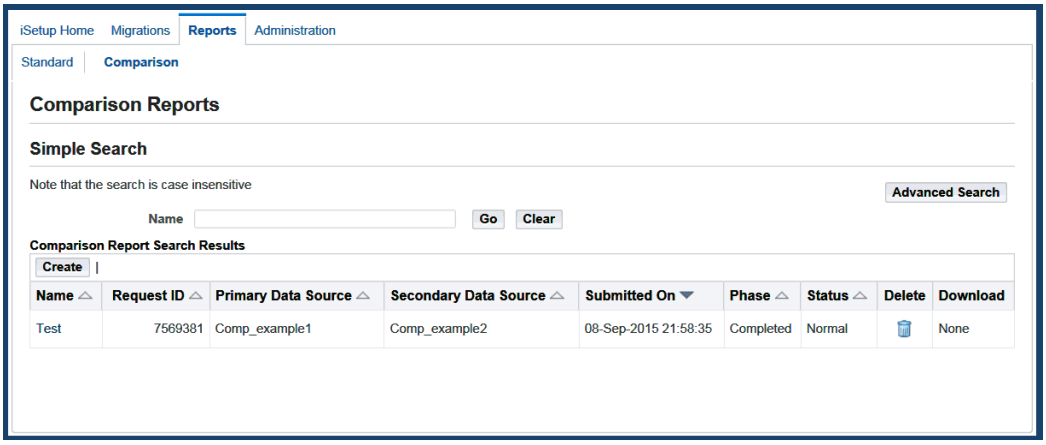
Deleting a Standard Report

Click the **Delete** icon in the Standard Reports page to delete a report. This takes you to the Warning page where you must confirm the delete action. Once you confirm the deletion, you return to the Standard Reports Search page.

Comparison Reports

A comparison report is generated from two extracts. You can create a new comparison report or view an existing comparison report.

Comparison Reports



Searching for Comparison Reports

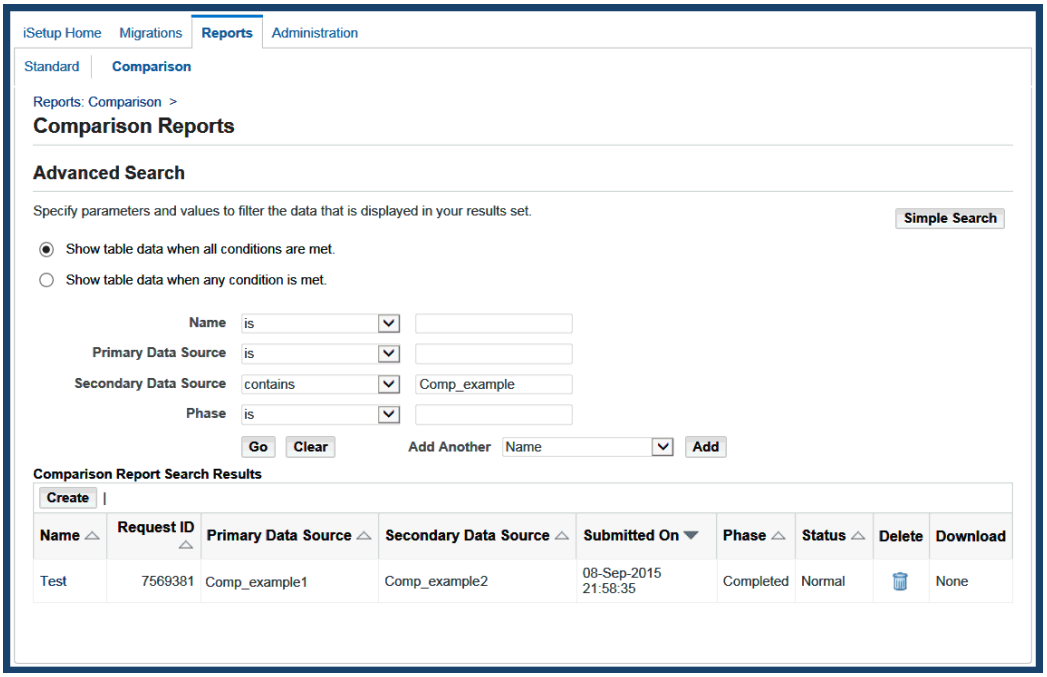
You can either do a Simple Search or an Advanced Search.

In **Advanced Search**, you can search on the following attributes of the comparison report:

- Name
- Request ID
- Primary Data Source
- Secondary Data Source
- Submitted On
- Phase
- Status

In addition, you can have the search results match any or all the criteria you specify by selecting an appropriate button.

Advanced Search for Comparison Reports



Search Results

All comparison reports that match your search criteria are displayed in a table format. Use the search results page to:

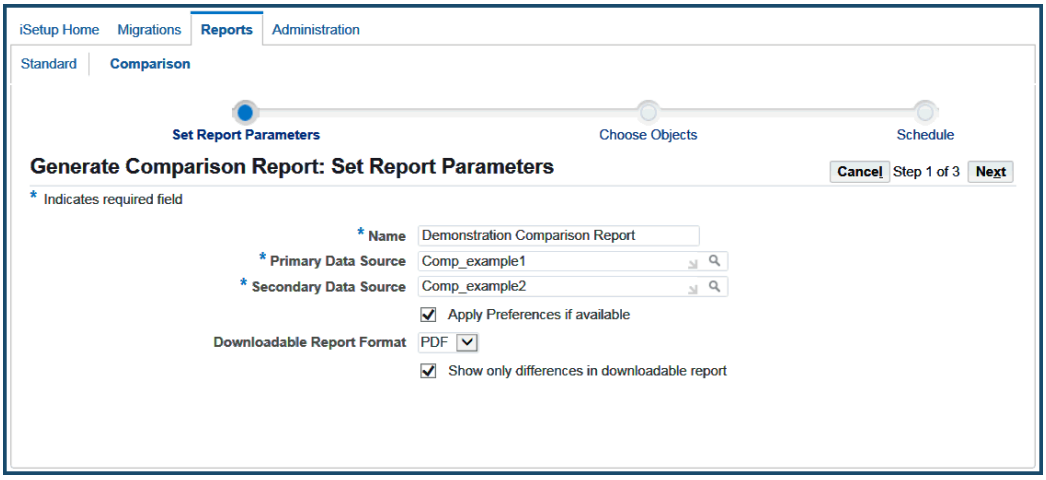
- View the details of a selected report
- Create a comparison report by clicking **Create**

- Download a report by clicking the ZIP file
- Delete a report by clicking the **Delete** icon

Creating a Comparison Report

From the Reports tab, select the Comparison subtab, and click **Create**.

Generate Comparison Report: Set Report Parameters



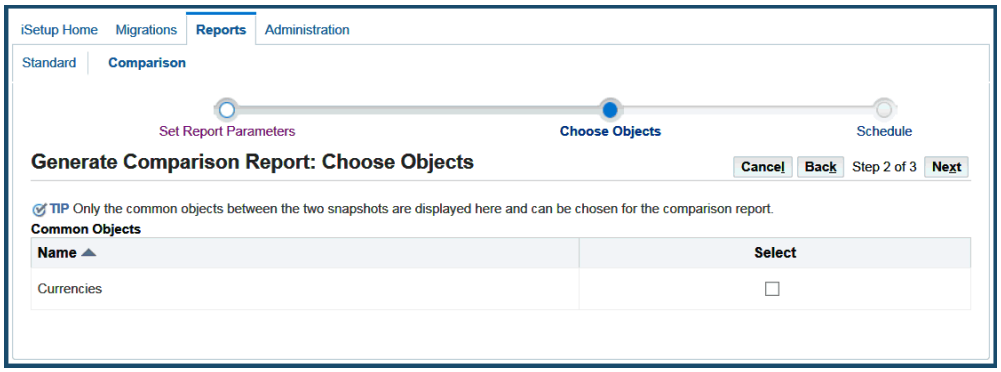
Following are the steps to create a comparison report:

1. **Name:** Enter a unique name for the comparison report. This is a required field.
2. **Primary Data Source:** Select a Primary Data Source.
3. **Secondary Data Source:** Select a Secondary Data Source.
4. **Downloadable Report Format:** In addition to the online report, you can also select the format for a downloadable report. You can download the comparison report as a .PDF, or .RTF. The recommended format is PDF.
5. **Apply Preferences if Available:** If one or more interfaces in the extract have preferences configured for them, checking this box will apply those preferences while generating the report. On the same note, if this box is not checked, the user-configured preferences will not be applied on the interfaces during report generation.
6. Click the check box "Show only differences in downloadable report" if you want only the differences to be reflected in the downloadable report.
7. Click **Next**. Based on the snapshots you have selected, the common objects of the

two snapshots are listed. Select the objects on which you want to generate the report.

In the table showing the common objects, the Preferences Enabled column displays a tick icon corresponding to those interfaces for which preferences will be applied. This column would appear only if the 'Apply Preferences if Available' box in on the previous page is checked.

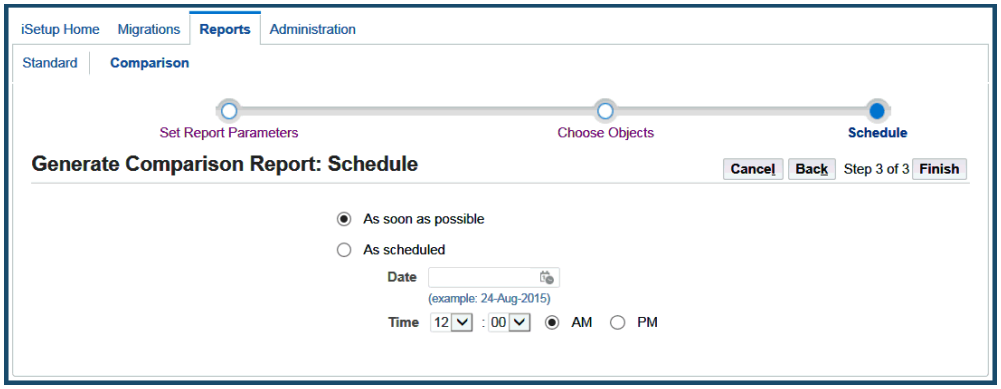
Generate Comparison Report: Choose Objects



Note: A comparison report cannot be generated if the extracts do not have any common objects.

8. **Schedule:** Create the report as soon as possible or schedule it for a later date and time.

Generate Comparison Report: Schedule



Viewing a Comparison Report

Click the report name to view the details of a report.

This view displays the objects that form the report and the number of records that are exclusive to the primary data source, exclusive to secondary data source, and records that are different as well as identical records.

Refresh: Refresh the page to get the current status. The **Refresh** button appears as long as the status of the report is not Complete.

View Log: Click **View Log** to see the log generated during the generation of this report.

To view the report generated for a data object, click on any of the difference count. Only the records of the clicked difference type is displayed. For example, clicking on the "Exclusive to Primary Data Object" count will display only those records that are exclusive to the primary data source.

This page allows you to search based on the difference types and the search criteria available for that interface.

Click the object name to view the contents of the object. A comparison view of the contents of the primary data source and secondary data source appears.

The following table describes the icons used to describe the records.

Record Icons

Legend Icon	Description
	Record only available in the Primary Data Source.
	Record only available in the Secondary Data Source.
	Record is present in the Primary and the Secondary Data Source, but has differences in some attributes.
	The attribute that is different for a record, which is present in the Primary and the Secondary Data Source.

Attribute differences are identified with the not equal to icon in the Different column.

Click **Printable Page** for a print version of the comparison report.

Downloading a Comparison Report

If you had specified a download format for the report, a ZIP file containing the report is available on the Comparison Reports page. Click the Download link for the required report. You can also initiate the download from the Comparison Report Details page.

Additional Information:

1. Download would be available if:
   - A download format was specified during creation of a comparison report.
   - Report is generated without any errors and the Phase is Complete and the Status is Normal.
2. Download file name is the report Request ID and is generated by the system.

The downloaded ZIP file contains the following files and folders:

- **File *index.html*:** This file contains details of the request such as the report name, date of submission, data source name. It contains the details of the hierarchy of data objects as in the Selection Set of the Primary Data Source and the number of records that are different for those common data objects, which were selected for reporting. The **View Detail** icon takes you to the report for the data object.
- **Folder *Publishedfiles*:** This folder contains the different object reports.
- **Folder *index_files*:** This folder contains images that appear in the `index.html` file.

Once you have downloaded the report, you need to extract the contents to a folder. Open the `index.html` file to access the report.

Deleting a Comparison Report

Click the **Delete** icon in the Comparison Reports page to delete a report. This takes you to the Warning page where you must confirm the delete action. Once you confirm the deletion, you return to the Comparison Reports Search page.

7

Interface Repository

This chapter explains the Interface Repository feature and its usage. All Oracle iSetup users can access Interface Repository for searching existing interfaces and users with the iSetup Super User role can register interfaces as well.

This chapter covers the following topics:

- Overview
- Searching for Interfaces
- Registering an Interface
- Updating an Interface
- Example of Data Migration Using Registered Interfaces

Overview

Oracle iSetup provides a central repository where users with the iSetup Super User role can register Generic Loader type of interfaces with Interface Repository. These registered interfaces contained in the AZ_APIS table can be used later in creating custom selection sets. See: Creating a Custom Selection Set, page 5-10.

In addition to interface registration, iSetup Interface Repository also provides search and update features.

For security consideration, the Interface Repository is only available for users with the iSetup Super User role along with the iSetup responsibility.

Prerequisites Before Registering Interfaces:

Before registering the interface, users should perform the following tasks:

1. Create a function of type Interface Method using the Function Developer responsibility.

   Use the following naming standards while defining the function code for the

different types:

- Type Generic Loader:

  FNDLOAD:<path>

- Type Extension

  EXT:<path>

- Type Service Bean

  EXT:<path>

`<path>` is the same as that of one entered while registering the interface.

2. Create a menu of type Interface and associate the function created in previous step. Make sure to clear the **Grant** check box.

3. Update the iSetup Super User role by creating a grant and associate the menu created in previous step with the grant.

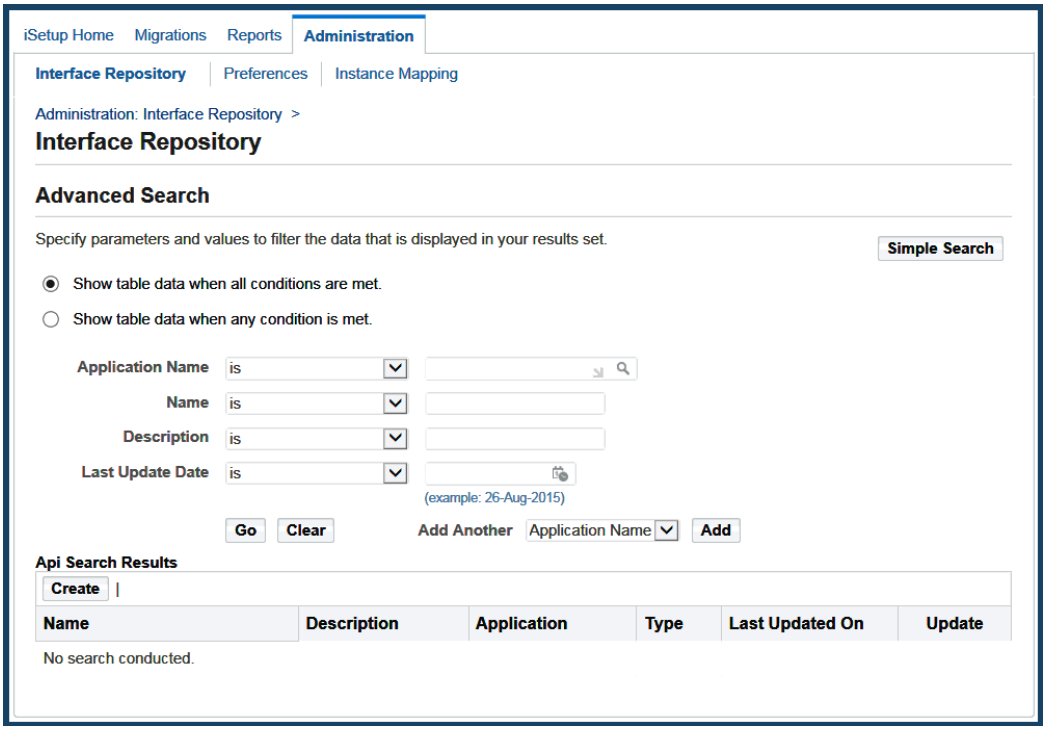
Searching for Interfaces

Oracle iSetup uses the search feature as the main entry to the Interface Repository.

To access the Interface Repository, select the Administration tab and then the Interface Repository subtab.

By default, you get the Advanced Search page.

Interface Repository Advanced Search



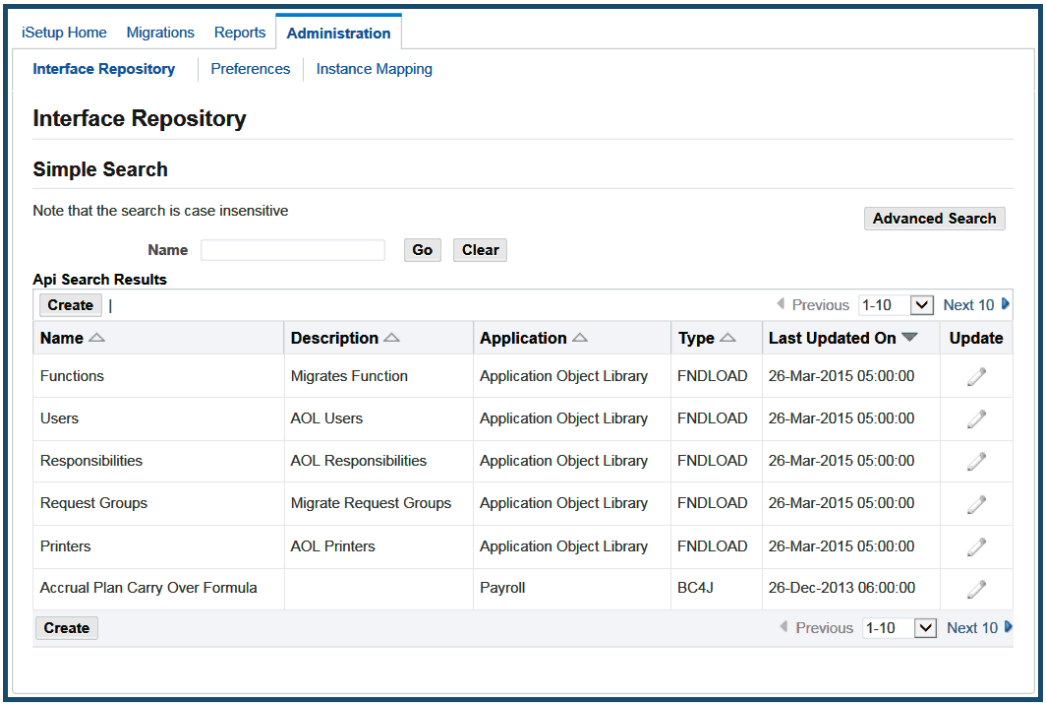
In **Advanced Search**, you can search on the following attributes of interfaces:

- Application Name
- (Display) Name
- Description
- Last Update Date

You can also search by user and API type from the Add Another drop-down list along with other criteria you entered. In addition, you can have the search results match any or all the criteria you specify by selecting the appropriate option.

You can use a Simple Search to search interfaces only by name.

Interface Repository Simple Search



Search Results

Oracle iSetup uses the search results region as the main entry to the Interface Repository. Through the search results, you can update existing interfaces that you have created by clicking appropriate icons.

All interfaces that match your search criteria are listed in a table format. Use the search results page to:

- View a list of interfaces with name, description, application, user, type, and last updated date

  The values in the User column could be the user names who created the interfaces or Oracle for seeded interfaces.

- Register a new interface with Interface Repository by clicking **Create** if you have the iSetup Super User responsibility

  See: Registering an Interface, page 7-5.

- Update an interface you created before by clicking the **Update** icon

  See: Updating an Interface, page 7-12.

Registering an Interface

To register an interface, you should have the iSetup Super User responsibility.

Navigate to the Administration tab, select the Interface Repository subtab, and click **Create** to access the Create Interface page to register new interfaces with iSetup Interface Repository.

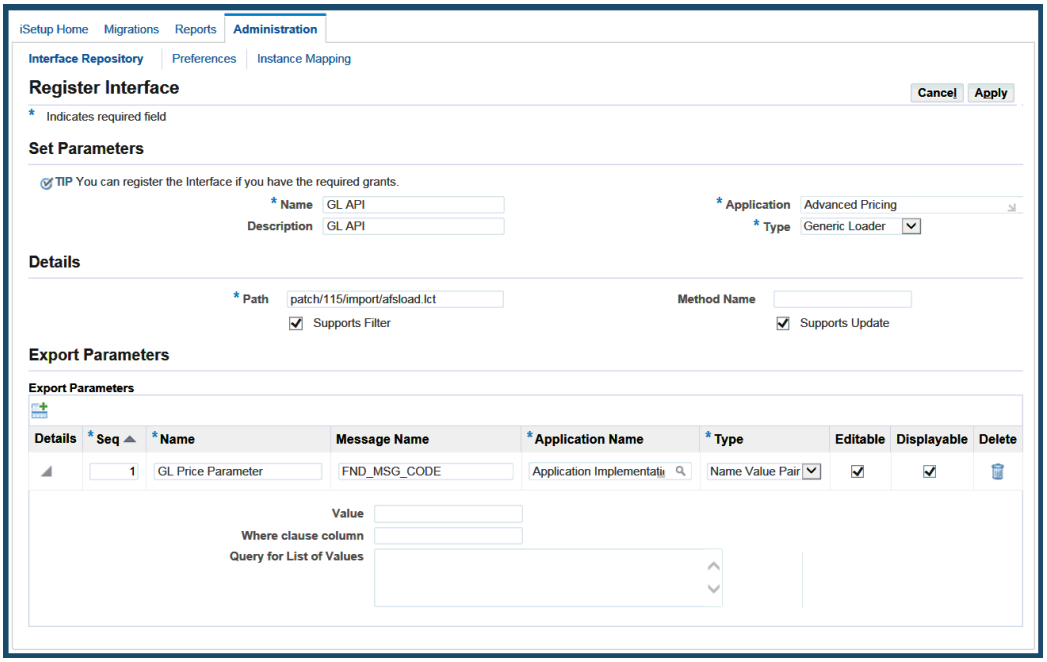
These registered interfaces can be used later in custom selection sets. See: Creating a Custom Selection Set, page 5-10 and Example of Data Migration Using Registered Interfaces, page 7-12 for details.

You can register three different types of interfaces:

- Generic Loader type
- Extension type
- Service Bean type

Generic Loader Type Interface

Register Generic Loader Type Interface



Use the following steps to register a Generic Loader type interface:

1. Enter information in the Set Parameters region:

- **Name:** Enter a name for your interface. This is a required field.
- **Description:** Enter descriptive information.
- **Application:** Select an application that owns the interface from the list of values. This is a required field.
- **Type:** Select Generic Loader from the list. Generic Loader indicates that the interface should be LCT based. This is a required field.

2. Enter information in the Details region:
   - **Path:** Provide the path for the interface such as `patch/115/import/afsload.lct`. This is a required field.
   - **Supports Filter:** Select this check box to indicate support for filtering and the corresponding filterable attributes can be provided in the Export Parameters region.
   - **Supports Update:** Select this check box to indicate that interface will update a record in the target instance if it finds a match after validation.
3. Click **Add Parameter** to enter the following information in the Export Parameters region:
   - **Seq:** Enter the order of this parameter needs to be passed to the interface for export operation.
   - **Name:** Enter the exact name of the filterable parameter defined in the corresponding LCT file.
   - **Message Name:** Enter the FND message name for the prompt of this parameter. This message name is used to display the prompt in the selection set while filtering a data object.
   - **Application Name:** Enter the application that owns the message name.
   - **Type:** Select one of the following values from the drop-down list:
     - **Name Value Pair:** If interface expects both name and value as filterable parameter during the export operation.
     - **Standalone:** If interface expects only name (standard tokens) and does not need to provide a value for the filterable parameter during the export operation.
     - **Value:** If interface expects only value and does not need to provide a name

for the filterable parameter during the export operation.

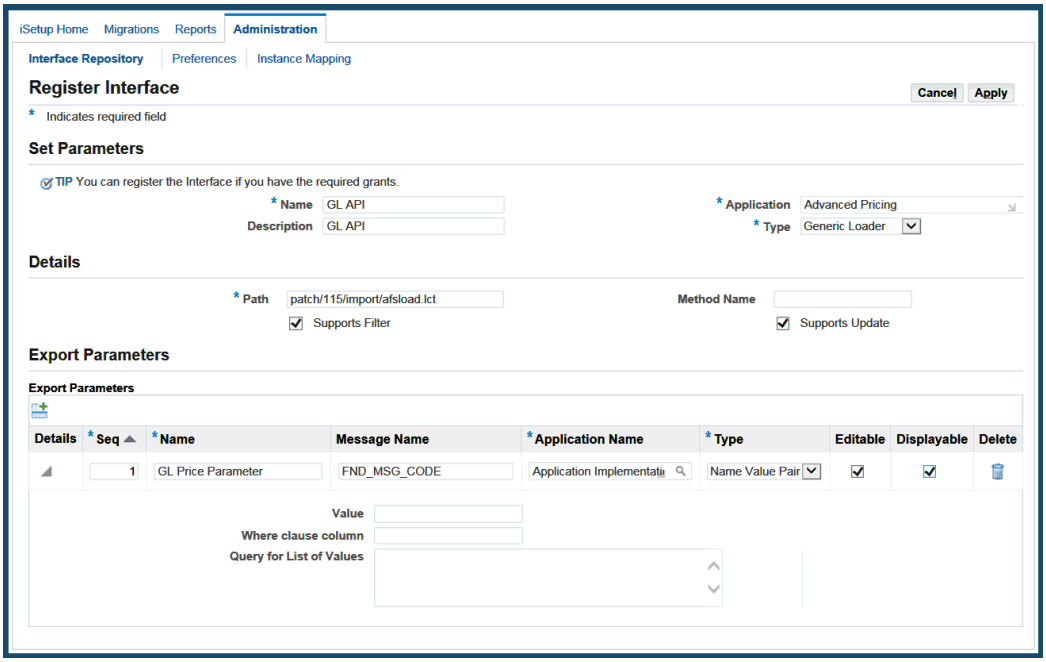
- **Editable:** Select this check box to indicate the value of the filterable parameter can be editable while setting the filter.
- **Displayable:** Select this check box to indicate the parameter can be displayed as a filterable one to the end user while setting the filter.
- **Value:** This field is useful if the Parameter type is Name Value Pair or Value. It's optional for the user to enter a value. If any values are set, then these will be considered as default values for filtering during the export process. This value would be defaulted to `%` if the user doesn't enter any value.
- **Query for List of Values:** The SQL query entered here will be used to render the list of values while setting the filters for data objects in the selection set.

  Your SQL query should have only one column in the `SELECT` clause.
- **Where Clause Column:** You need to provide the `Where` clause column name if the parameter name is different from the one specified in the `SELECT` clause of the Query for List of Values field.

4. Click the **Delete** icon if you want to delete a parameter.
5. Click **Add Parameter** if you want to add another parameter row to the Export Parameters table.
6. Click **Apply** to validate and save the creation with a confirmation message.

Extension Type Interface

Register Extension Type Interface



Use the following steps to register an Extension type interface:

1. Enter information in the Set Parameters region:
    - **Name:** Enter a name for your interface. This is a required field.
    - **Description:** Enter descriptive information.
    - **Application:** Select an application that owns the interface from the list of values. This is a required field.
    - **Type:** Select Extension from the list. Extension indicates that the interface should be java class based.
2. Enter information in the Details region:
    - **Path:** Provide the path for the interface such as `oracle.apps.az.r12.ext.api.HelloExtAPI`. This is a required field.
    - **Supports Filter:** Select this check box to indicate support for filtering and the corresponding filterable attributes can be provided in the Export Parameters region.

- **Supports Update:** Select this check box to indicate that interface will update a record in the target instance if it finds a match after validation.

- Supports Transform: Select this check box to indicate that the interface is transformable before loading to target instance.

3. Click **Add Parameter** to enter the following information in the Export Parameters region:

   - **Seq:** Enter the order of this parameter needs to be passed to the interface for export operation.

   - **Name:** Enter the exact name of the filterable parameter defined in the corresponding Java file.

   - **Message Name:** Enter the FND message name for the prompt of this parameter. This message name is used to display the prompt in the selection set while filtering a data object.

   - **Application Name:** Enter the application that owns the message name.

   - **Type:** Select one of the following values from the list:

     - **Name Value Pair:** If interface expects both a name and a value as a filterable parameter during the export operation.

     - **Standalone:** If interface expects only a name (standard token) and does not need to provide a value for the filterable parameter during the export operation.

     - **Value:** If interface expects only a value and does not need to provide a name for the filterable parameter during the export operation.

   - **Editable:** Select this check box to indicate the value of the filterable parameter can be editable while setting the filter.

   - **Displayable:** Select this check box to indicate the parameter can be displayed as a filterable one to the end user while setting the filter.

   - **Value:** This field is useful if the Parameter type is Name Value Pair or Value. It's optional for the user to enter a value. If any values are set, then these will be considered as default values for filtering during the export process. This value would be defaulted to % if the user doesn't enter any value.

   - **Query for List of Values:** The SQL query entered here will be used to render the list of values while setting the filters for data objects in the selection set.

Your SQL query should have only one column in the `SELECT` clause.

- **Where Clause Column:** You need to provide the `Where` clause column name if the parameter name is different from the one specified in the `SELECT` clause of the Query for List of Values field.

4. Click the **Delete** icon if you want to delete a parameter.

5. Click **Add Parameter** if you want to add another parameter row to the Export Parameters table.

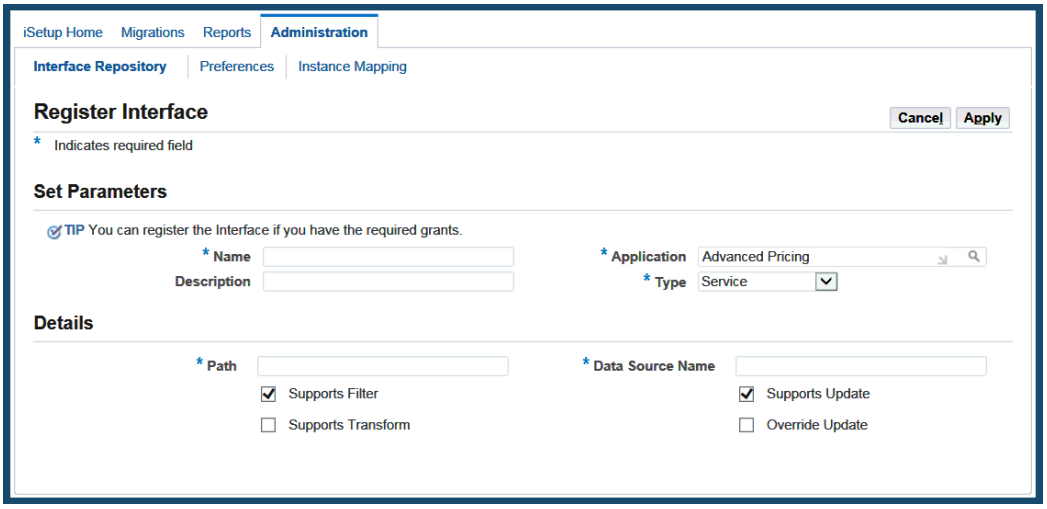
6. Click **Add Parameter** to enter the following information in the Import Parameters region:
   - **Seq:** Enter the order of this parameter needs to be passed to the interface for the import operation.
   - **Name:** Enter the exact name of the filterable parameter defined in the corresponding Java file.
   - **Type:** Select one of the following values from the drop-down list:
     - **Name Value Pair:** If interface expects both a name and a value as a filterable parameter during the export operation.
     - **Standalone:** If interface expects only a name (standard token) and does not need to provide a value for the filterable parameter during the export operation.
     - **Value:** If interface expects only a value and does not need to provide a name for the filterable parameter during the export operation.
   - **Value:** This field is useful if the Parameter type is Name Value Pair or Value. It's optional for the user to enter a value. If any values are set, then these will be considered as default values for filtering during the import process. This value would be defaulted to `%` if the user doesn't enter any value.

7. Click **Add Parameter** if you want to add another parameter row to the Import Parameters table.

8. Click **Apply** to validate and save the creation with a confirmation message.

Service Type Interface

Register Service Type Interface



Use the following steps to register a Service type interface.

1. Enter information in the Set Parameters region:
   - **Name:** Enter a name for your interface. This is a required field.
   - **Description:** Enter descriptive information.
   - **Application:** Select an application that owns the interface from the list of values. This is a required field.
   - **Type:** Select Service from the list. Service indicates that the interface should be AM class based.
2. Enter information in the Details region:
   - **Path:** Provide the path for the interface such as `oracle.apps.fnd.framework.svctoolbox.labsolutions.server.SupplierSAM`. This is a required field.
   - **Supports Filter:** Select this check box to indicate support for filtering and the corresponding filterable attributes can be provided in the Export Parameters region.
   - **Supports Update:** Select this check box to indicate that interface will update a record in the target instance if it finds a match after validation.

- **Supports Transform:** Select this check box to indicate that the interface is transformable before loading to target instance.

3. Click **Apply** to validate and save the creation with a confirmation message.

Updating an Interface

Only the interface creator has the privilege to update the interface that he or she created before. The **Update** icon for the interface will not be enabled if you are not the creator.

To update an interface, select an interface from the search results region and click the **Update** icon to access the Update Interface window.

You can update the interface information in the Details and Export Parameters regions as well as delete parameter rows if you want; however, you cannot change the interface name, type, and application in the Set Parameters region as they are displayed in read-only fields.

Example of Data Migration Using Registered Interfaces

To best understand the Interface Repository and custom selection set features, use the following steps as a guideline to migrate data using registered interfaces.

Business Scenario

A need to create a new custom selection set to include a new interface and then use this selection set for Extract and Load processes.

Assumption: *There are three different instances available as Central, Source, and Target instances.*

Follow the steps to migrate data using registered interfaces:

1. Ensure that Central, Source, and Target instances have the same username with the iSetup responsibility and iSetup Super User role.

2. Ensure the completion of the prerequisites before registering the interface in your Central instance.

   See: Prerequisites Before Registering Interfaces, page 7-1.

3. Register a new interface with iSetup Interface Repository.

   See: Registering an Interface, page 7-5.

4. Register the function in the Source for Extract and in the Target for Load processes.

   Function of type Interface Method corresponding to the interface needs to be registered in the Source for Extract and in the Target for Load processes.

   See: Prerequisites Before Registering Interfaces, page 7-1, Step 1 Create function of

type Interface Method for details.

5. Migrate the menu registered.

   Create a custom selection set by adding the interface Menus as a data object. Set the filter for Menu Code with the desired criteria. Perform an extract on this selection set from Source instance and then load the extract to Target instance.

   See: Creating a Custom Selection Set, page 5-10.

6. Migrate the iSetup Super User role which is updated with the new grant.

   Create a custom selection set by adding the interface iSetup Super User Role. Perform an extract on this selection set from Source instance and then load the extract to Target instance.

7. Migrate the metadata of the new interface that is registered.

   Create a custom selection set by adding the interface iSetup Interface as data object to migrate the interface metadata that is registered. Set the Filter for Interface Code as the Interface Code generated through Interface Repository and Application Short Name as AZ. Perform an extract on this selection set from Source instance and then load the extract to Target instance.

8. Migrate the data using the registered interface.

   Create a custom selection set by adding the registered interface as a data object. Set the required filters if there are any and then perform the Extract and Load operations.

A

Selection Set Templates

Oracle iSetup provides you with a set of selection set templates. This appendix describes the information on selection set templates.

This appendix covers the following topics:

- Overview
- Grouped Selection Sets
- Individual Selection Sets
- Custom Selection Sets

Overview

Oracle iSetup provides you with a set of selection set templates which help the creation of selection sets. Oracle iSetup groups them into the following categories:

- Grouped Selection Sets, page A-1
- Individual Selection Sets, page A-6
- Custom Selection Sets, page A-13

Grouped Selection Sets

Selection sets in this category group the interrelated data objects under one umbrella. These selection sets would be useful in the fresh implementation. This category includes the following selection sets.

General Foundation Selection Set

Description: This selection set is used to migrate Oracle Application Object Library Foundation setups.

General Foundation Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
General Foundation			
Lookups	No	No	Yes
Printers	No	No	Yes
Request Groups	No	No	Yes
Menus	Yes	No	Yes
Responsibilities	No	No	Yes
Users	No	No	Yes
Key Flexfields	No	No	Yes
Descriptive Flexfields	Yes	No	Yes
Document Sequences	No	No	Yes
Value Set Values	No	No	Yes
Document Sequence Categories	No	No	Yes
Concurrent Programs	Yes	No	Yes

Organization Structure Selection Set

Description: This selection set is used to migrate the organization structure setups.

Prerequisites:

- If the customer is Financial and HRMS, then Oracle iSetup recommends that you manually set up the Legal Entity and Operating Unit data objects on the target instance before using this selection set.
- If the customer is HRMS only, then Oracle iSetup recommends that you create custom selection sets by adding the Legal Entity and Operating Unit data objects and then migrate the setups to target instance before using this selection set.

Organization Structure Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Organization Structure			
Locations	Yes	No	Yes
Business Groups	Yes	No	Yes
Organizations	Yes	No	Yes
Organization Structure Versions	Yes	No	Yes
Organization Structures	Yes	No	Yes
Organization Structure Elements (Hierarchies)	Yes	No	Yes
Job Groups	Yes	No	Yes
Jobs	Yes	No	Yes
Grades	Yes	No	Yes
Position Structures	Yes	No	Yes
Position Structure Elements (Hierarchies)	Yes	No	Yes
Position Structure Versions	Yes	No	Yes
Positions	Yes	No	Yes
Payrolls	Yes	No	Yes

Financials Setup Selection Set

Description: This selection set is used to migrate Financials setup data. It includes the most of the General Ledger setups. This selection set covers the following modules:

- General Ledger
- Cash Management

Prerequisites:

- Before loading this selection set to the target instance you need to load the Organizations selection set.
- Ledger needs to be created manually.

Financials Setup Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
General Ledger			
Chart of Account	No	No	Yes
Currencies	No	No	Yes
Accounting Calendars	No	No	Yes
Budgets	No	No	Yes
Ledger Sets	No	No	Yes
Data Access Sets	No	No	Yes
Cash Management			
System Parameters	No	No	No
Transaction Codes	No	No	No

Payroll Element Selection Set

Description: This selection set is used to migrate HRMS Payroll Elements.

Payroll Element Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Payroll Element			
Balance Types	Yes	No	No
Defined Balances	No	No	No
Balance Attributes	No	No	Yes
Element Classifications	No	No	Yes
Fast Formula	No	No	No
Element Types	Yes	No	No
Input Values	No	No	No
Balance Feeds	No	No	No
Status Processing Rules	No	No	No
Formula Result Rules	No	No	No
Secondary Classifications	No	No	No
Run Types	No	No	No
Element Type Usages	No	No	No
Frequency Rules	No	No	No
Primary Balances	No	No	Yes
Element EIT	No	No	Yes
Iterative Rules	No	No	Yes

Data Object Name	Filterable	Transformable	Updatable
Retro Component Usages	No	No	Yes
Element Span Usages	No	No	Yes
Grossup Balance Exclusions	No	No	Yes

XML Publisher Selection Set

Description: This selection set is used to migrate XML Publisher metadata, templates, translations, XML samples and schema.

XML Publisher Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Metadata	Yes	No	Yes
Template Files	No	No	Yes
Template Translations	No	No	Yes
Template Files, both Localized and MLS (Translatable)	No	No	Yes
Template Translations	No	No	Yes
XML Samples	No	No	Yes
XML Schema	No	No	Yes

Individual Selection Sets

Selection sets in this category contain only one data object. These selection sets would be useful in the rollup and fresh implementation. This category includes the following

selection sets.

Employees Selection Set

Description: This selection set is used to migrate employees data.

Employees Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Employees	Yes	No	No

General Foundation Key Flexfield Selection Set

Description: This selection set is used to migrate General Foundation Key Flexfield setup data.

This data object is also available as part of the General Foundation selection set under the category of Grouped Selection Sets, page A-1.

General Foundation Key Flexfield Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Key Flexfield	Yes	No	Yes

General Foundation Descriptive Flexfield Selection Set

Description: This selection set is used to migrate General Foundation Descriptive Flexfield setup data.

This data object is also available as part of the General Foundation selection set under the category of Grouped Selection Sets, page A-1.

General Foundation Descriptive Flexfield Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Descriptive Flexfield	Yes	No	Yes

General Foundation Value Set Selection Set

Description: This selection set is used to migrate General Foundation Value Set setup

data.

This data object is also available as part of the General Foundation selection set under the category of Grouped Selection Sets, page A-1.

General Foundation Value Set Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Value Set	Yes	No	Yes

General Ledger Accounting Calendars Selection Set

Description: This selection set is used to migrate General Ledger Accounting Calendars setup data.

This data object is also available as part of the Financial Setup selection set under the category of Grouped Selection Sets, page A-1.

General Ledger Accounting Calendars Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Accounting Calendars	Yes	Yes	Yes

General Ledger Budget Selection Set

Description: This selection set is used to migrate General Ledger Budget setup data.

This data object is also available as part of the Financial Setup selection set under the category of Grouped Selection Sets, page A-1.

General Ledger Budget Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Budgets	Yes	No	Yes

General Ledger Chart of Accounts Selection Set

Description: This selection set is used to migrate General Ledger Chart of Accounts setup data. This selection set will create the accounting flexfield, value sets, and values

of the respective accounting flexfield.

This data object is also available as part of the Financial Setup selection set under the category of Grouped Selection Sets, page A-1.

General Ledger Chart of Accounts Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Chart of Accounts	Yes	No	Yes

General Ledger Code Combinations Selection Set

Description: This selection set is used to migrate General Ledger Accounting Flexfield Code Combinations setup data.

This data object is also available as part of the Financial Setup selection set under the category of Grouped Selection Sets, page A-1.

General Ledger Code Combinations Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Code Combinations	Yes	No	Yes

General Ledger Currencies Selection Set

Description: This selection set is used to migrate General Ledger Currencies setup data.

This data object is also available as part of the Financial Setup selection set under the category of Grouped Selection Sets, page A-1.

General Ledger Currencies Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Currencies	Yes	Yes	Yes

General Ledger Daily Rates Selection Set

Description: This selection set is used to migrate General Ledger Daily Rates setup data.

This data object is also available as part of the Financial Setup selection set under the

category of Grouped Selection Sets, page A-1.

General Ledger Daily Rates Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Daily Rates	Yes	No	Yes

General Ledger Data Access Sets Selection Set

Description: This selection set is used to migrate General Ledger Data Access Sets setup data.

This data object is also available as part of the Financial Setup selection set under the category of Grouped Selection Sets, page A-1.

General Ledger Data Access Sets Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Data Access Sets	Yes	No	Yes

General Ledger Statistical Units of Measure Selection Set

Description: This selection set is used to migrate General Ledger Statistical Units of Measure setup data.

This data object is also available as part of the Financial Setup selection set under the category of Grouped Selection Sets, page A-1.

General Ledger Statistical Units of Measure Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Statistical Units of Measure	Yes	No	Yes

Ledger Sets Selection Set

Description: This selection set is used to migrate Ledger Sets setup data.

Prerequisites: Before loading this selection set data, you need to create the Ledgers manually.

This data object is also available as part of the Financial Setup selection set under the category of Grouped Selection Sets, page A-1.

General Ledger Currencies Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Ledger Sets	Yes	No	Yes

Personalizations Selection Set

Description: This selection set is used to migrate Personalizations. This selection set is limited to the Self-Service Applications which are based on the Oracle Application (OA) Framework only.

Personalizations Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Personalizations	Yes	No	Yes

Enterprise Performance Foundation Conditions Selection Set

Description: This selection set is used to migrate Enterprise Performance Foundation Conditions.

Enterprise Performance Foundation Conditions Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Conditions	Yes	No	Yes

Profitability Manager Mapping Rules Selection Set

Description: This selection set is used to migrate Profitability Manager Mapping Rules.

Profitability Manager Mapping Rules Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Mapping Rule	Yes	No	Yes

Profitability Manager Statistics Rules Selection Set

Description: This selection set is used to migrate Mapping Rule Statistics.

Profitability Manager Statistics Rules Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Statistics Rule	Yes	No	Yes

Workflow Business Event System Objects Selection Set

Description: This selection set is used to migrate Workflow Business Event System Objects Definitions.

Workflow Business Event System Objects Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Workflow Business Event System Objects	Yes	No	No

Workflow Definitions Selection Set

Description: This selection set is used to migrate Workflow definitions.

Workflow Definitions Selection Set Metadata

Data Object Name	Filterable	Transformable	Updatable
Workflow Definitions	Yes	No	No

Custom Selection Sets

Oracle iSetup allows you to create custom selection sets by choosing the following data objects to create selection sets suitable for your business. You can also add data objects by registering the interfaces with Oracle iSetup using the Interface Repository feature.

- FND Concurrent Programs
- iSetup Interface Metadata
- iSetup Super User Role
- Functions
- Menu
- Lookups
- Printers
- Responsibilities
- Users
- Request Groups
- Role
- Legal Entity
- Operating Unit

Please note that the Legal Entity and Operating Unit data objects would only move HRMS related setups.

B

Profile Options

This appendix lists profile options and categories used in Oracle iSetup.

This appendix covers the following topics:

- Oracle iSetup Profile Options and Categories

Oracle iSetup Profile Options and Categories

Oracle iSetup uses the profile options in the following table to perform necessary setups:

Oracle iSetup Profile Options

Profile Internal Names	Profile Display Names	Profile Category	Description
AZ_R12_HOME_NUM_OF_RECORDS	AZ: Number Of Records For Home Tab	User Interface	This profile option specifies the number of records to be displayed in the iSetup Home tab. The recommended value is 4.
AZ_REPORTER_MAX_RECORDS	AZ: Reporter max records	User Interface	This profile option specifies the number of records that the system would fetch for rendering the online report. The maximum value is 200 and the recommended value is 100.
AZ_R12_REFRESH_DURATION	AZ: Refresh Duration	User Interface	This profile options gets the request phase and status from FND tables after this duration.

Profile Internal Names	Profile Display Names	Profile Category	Description
AZ_COMMIT_ROW COUNT	AZ: Commit Row Count	Concurrent Processing	This profile option specifies the number of records that Oracle iSetup commits to the database on the target instance during load. it is set on the target instance only.
AZ_EXPORT_LANG S	AZ: Export Languages	Concurrent Processing	This profile lists languages to be used by the iSetup Framework BC4J API, FNDLOAD API, and the WFLOAD API in exporting data. Valid values are as follows: • ALL - All languages • SESSION - The current session language • [blank] - If this profile is left blank, the result is the same as that with 'ALL' • A comma-delimited list of specific language codes. For example, 'AR,KO,US' **Note:** When the target base language or the language 'US' is not extracted, please make sure one of them already exists in the target instance. Otherwise, extract and load it because it is required to maintain multilingual tables in the target instance.
AZ_LOADER_MODE	AZ: Loader Mode	Concurrent Processing	This profile sets the running mode for iSpeed Setups loader. Valid value is LOAD/LOAD_ALL/MERGE_ONLY.

Profile Internal Names	Profile Display Names	Profile Category	Description
AZ_R12_CP_NUM_OF_BATCHES	AZ: CP Number Of Batches	Concurrent Processing	This profile specifies number of multiple threads that can parallely process APIs.
AZ_R12_DEBUG_MODE	AZ: Debug Mode	Concurrent Processing	This profile controls running Oracle iSetup requests in debug mode.
AZ_R12_MERGE_PDF	AZ: Merge Pdf	Concurrent Processing	This profile controls merging of PDFs in downloadable reports.
AZ_VO_FETCH_SIZE	AZ: VO Fetch Size	Concurrent Processing	This profile option specifies the number of records that Oracle iSetup extracts in a batch, before it writes to a temporary location on the file system for later use. This profile is set on the source instance only.

Additional Information: This following profile options have been end dated and no longer used in the Oracle iSetup:

- AZ: Archive Release
- AZ: Current Mode
- AZ: Current Phase
- AZ: Proxy Host
- AZ: Proxy Port
- AZ: User Defined Selection Feature

See: Profile Categories, *Oracle E-Business Suite Setup Guide* for more information.

C

Language Support Levels by Component

This appendix describes the language support in Oracle iSetup.

This appendix covers the following topics:

- Oracle iSetup Language Support Levels by Component

Oracle iSetup Language Support Levels by Component

Restrictions/Limitations

- The same database character set is used for the Source, Central (Migrator), and Target instances.
- Extract languages of the source instance must be a subset or same as the Target instance.
- Extract languages of the source instance must contain "US" or the Target base language for INSERT processing. (Otherwise, a warning message will be shown).
- The Oracle iSetup user interface is US English only.

BC4J API

BC4J APIs (.xml) : Language data can be extracted according to the AZ: Export Languages profile setting.

Generic Loader APIs

Generic Loader APIs (.ldt and .wft): For extracting, language data can be extracted only in the current session language until Release 12.2.5. Since 12.2.6, language data can be extracted according to the AZ: Export Languages profile setting.

For loading, language data cannot be loaded properly through Release 12.2.4. To work

around the limitation, either of the following workarounds should be used before Release 12.2.5:

- Use the Oracle iSetup Load function by updating one day forward in (LAST_UPDATE_DATE) field in the language LDT file, or
- Use FNDLOAD with the `upload_mode=NLS` parameter from the command line.

Since Release 12.2.5, language data can be loaded using the `upload_mode=NLS` option of the Generic Loader API via the Oracle iSetup UI.

Oracle Application Framework Personalization APIs

Oracle Application Framework Personalization APIs (.xml and .xlf): Only translations in the session language at the time of creating the personalization for the first time will be extracted, even though other language translations exist in the source instance.

Workflow Business Event System Objects Definitions API

Workflow Business Event System Objects Definitions API (.wfx): Language data can be extracted in the language specified as a Filter.

XML Publisher API

XML Publisher APIs (.xsl, .xlf, .rtf, and so on): All language data can be extracted at once.

Glossary

Central Instance

This is an instance of the Oracle E-Business Suite where Oracle iSetup is running. However, this is optional since Oracle iSetup can be run from the source or the target instance.

Custom Selection Set

Oracle iSetup provides capability to allow users with iSetup Super User role to create a selection set by adding the data objects available with the iSetup Interface Repository.

Data Source

The source of setup data that you want to load or report on. The Data Source can be an extracted or a transformed snapshot.

Instance Mapping

The process of mapping instances for use as source or target instances during the extract or load process. Mapping an instance entails defining and maintaining instance Name, a DBC Filename, and an Oracle E-Business Suite Responsibility.

DBC File

Before creating a instance mapping, you must have a DBC (Database Connectivity) File created for instance that you want to map to.

Extract

The process of extracting data from the source instance. This results in an extracted snapshot.

Filter

Used to restrict or refine the selection of specific data from an instance during extract.

Instance Name

A logical name given to the instance you create during instance mapping. This instance name is used as the source or target instance in the Migrator user interface.

Interface Repository

Interface Repository provides a central location where users with iSetup Super User role along with the iSetup responsibility can register new interfaces. These interfaces can then be added to the custom selection sets for data migration.

Load

The process of loading extracted or transformed data from a snapshot to a target instance.

Migrator

Migrator lets you migrate data between different instances of the Oracle E-Business Suite. The iSetup Migrator migrates data by extracting data from source, transforming data - if required, and loading data to the target instance.

Reporter

Reporter gives you the capability to create single snapshot report or report to compare snapshots.

Responsibility

Oracle E-Business Suite Responsibility that is used to access the Concurrent Manager in the source or target instances for extract and load, respectively.

Restart Load

The process of restarting a failed load process. The load process could fail due to invalid objects in your system or an improperly configured environment. When the load fails, you can fix the problem and restart the processes from the user interface. The load process can restart from where it failed or can skip the failed object and its dependencies and restart from the next object.

Selection Set

A selection set is a logically grouped set of objects. You can set filters on some of these objects as part of your selection set definition.

Selection Set Template

Oracle iSetup provides you with a set of selection set templates. They are the starting point to create a selection set.

Setup Object

A setup entity or API that contains logic to extract or load setup data for a given entity, such as a Set of Books.

Snapshot

A snapshot contains data that is either extracted from a source instance or transformed and ready to be loaded to the target instance.

Source Instance

This is the instance of the Oracle E-Business Suite that is the source of data to be migrated. You extract data from this instance.

Target Instance

This is the instance of the Oracle E-Business Suite that is the target where data must be migrated. You load extracted or transformed data to this instance.

Transform

Prior to loading data to the target instance, you can specify a new value, for example a new name or a new parent object, for certain attributes of the object you are loading. The changes made on the object's attributes will cascade to all referenced objects.

Update Existing (During Load) Flag

Flag used upon loading to determine whether or not the object should be overwritten if the same object value already exists in the target instance.